2010 Inland Empire Annual Survey

Final Report



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THE 2010 INLAND EMPIRE ANNUAL SURVEY

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

PLATINUM SPONSOR: San Bernardino Associated Governments

SILVER SPONSORS:
Riverside County Economic Development Agency
Pathology Arts

BRONZE SPONSORS:
Omnitrans
Community Foundation

CHAPTER 1: INTRODUCTION AND METHODS INTRODUCTION

The Institute of Applied Research (IAR) is pleased to present the results of its **2010**Inland Empire Annual Survey. IAR has been conducting this annual survey in San Bernardino County for thirteen years and in Riverside County for eight out of the last thirteen years.

The purpose of the survey is to provide policy-related research that relates to issues important to both counties. This 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, 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
- ♦ <u>Disseminating a coherent picture of San Bernardino & Riverside County residents'</u>

 <u>views, beliefs, and demographic characteristics</u> to key decision makers within and outside the county, thus enabling comparisons to other counties.

The Inland Empire Annual Survey also includes (on a space available basis), some *proprietary items* designed to meet specific information needs of some sponsors within the region.

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 promote the Inland Empire as a significant region 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 San Bernardino County. This is a standard random sampling approach for studies of this nature.

In order to ensure accuracy of findings, 1,052 residents were surveyed from San Bernardino County for a 95 percent level of confidence and an accuracy of approximately plus/minus 3 percent. The sample size in Riverside County was 452, for an accuracy of plus/minus 4.6 percent and a 95% level of confidence. The higher accuracy rate for San Bernardino County when compared with Riverside County was a function of differential funding from the two counties.

Since the inception of the survey, SANBAG has expressed interest in region-specific analyses 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

INSTITUTE OF APPLIED RESEARCH Chapter 1: Introduction (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 San Bernardino County Respondents, Broken Down By the Four Designated SB County Study Areas

| DI UKCII DU | wii by the Four Desi | ignated SD County i | otuuy 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 | | | |
| | | | |

Riverside County sponsors did not request regional breakdowns. The following table lists Riverside County survey respondents' community/city of residence.

Communities and Cities Mentioned by Riverside County Respondents

| | - | - |
|--------------------|---------------|--|
| Anza | Homeland | Palm Springs |
| Banning | Indio | Perris |
| Beaumont | La Quinta | Rancho Mirage |
| Blythe | Lake Elsinore | Riverside |
| Cabazon | Mecca | San Jacinto |
| Calimesa | Menifee | Sun City |
| Cathedral City | Mira Loma | Temecula |
| Coachella | Moreno Valley | Thermal |
| Corona | Murrieta | Thousand Palms |
| Desert Center | Norco | White Water |
| Desert Hot Springs | Nuevo | Wildomar |
| Hemet | Palm Desert | Winchester |

INSTITUTE OF APPLIED RESEARCH Chapter 1: Introduction 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 surveys were conducted between February 9 and February 22, 2010.

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. The Riverside chapter focuses on economic development and workforce issues of interest to the Riverside County Economic Development Agency.

INSTITUTE OF APPLIED RESEARCH Chapter 1: Introduction

CHAPTER 2: SAN BERNARDINO COUNTY FINDINGS INTRODUCTION

Following are the major San Bernardino County findings from this year's survey. In general, this chapter is divided by conceptual category (e.g. 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 13 years of data are available. A full data display of overall San Bernardino County findings is shown in Appendix II, and regional breakdowns are shown in Appendix III.

RATINGS OF THE COUNTY

OVERVIEW: The majority of San Bernardino County residents in each zone continued to rate their county as a good place to live. Over the years, "general location" has been mentioned as the "best" thing about living in the county, followed by weather, affordable housing, and the lack of crowds. Although crime continues to be the most-often mentioned negative in all four zones, lack of job opportunities was for the first time mentioned alongside traffic and smog.

Since the inception of the Annual Survey, the majority of residents have rated San Bernardino County as a "fairly good" or "very good" place to live (Question 3). While the general ratings have dropped slightly over the past couple of years, roughly two-thirds of residents continue to rate the county as a "very good" or "fairly good" place to live (Table 1, next page).

Last year we noted that West Valley respondents gave San Bernardino County the highest rating since the inception of the report. This year's figure is the lowest in the thirteen years the survey has been conducted. But West Valley respondents still rate their county higher than residents in the other three regions. There was also a continuation of the drop in Victor Valley and Desert region respondents' ratings of life in the county, but these changes are within the

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 | 7 | 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 / 08 Survey | 56 | 76 | 66 | 76 | 67 |
| 2008 / 09 Survey | 53 | 84 | 66 | 66 | 69 |
| 2010 Survey | 59 | 73 | 61 | 61 | 65 |

margin of error. East Valley residents rated life in the county higher than they have for the past four years. One explanation for this improvement may be that this year East Valley respondents appeared to have less concern about crime and gang activity when compared with last year (see Tables 4 and 11).

Tables 2 and 3 provide further explanation of all of the above ratings by listing respondents' comments about the one BEST and one MOST NEGATIVE thing about living in the county (Questions 4 and 5). Responses to this question haven't changed much over the years, with respondents mentioning "good area/location/scenery" as the most positive aspect of living in the county (Table 2), followed by "Climate/weather", "affordable housing", and "not crowded."

Table 2. Positive Factors Mentioned About the County

| | East Valley % | West Valley % | Victor Valley % | Desert % | 2005 SB County % | 2006 SB County % | 2007/08 SB County % | 2008/09 SB County % | 2010 SB County % |
|------------------------------------|---------------------|---------------------|-----------------------|----------|---------------------------|---------------------------|------------------------------|------------------------------|---------------------------|
| Good area, location, scenery | 37 | 40 | 28 | 27 | 29 | 33 | 34 | 36 | 37 |
| Good Climate, weather | 15 | 7 | 20 | 21 | 14 | 15 | 11 | 17 | 13 |
| Affordable housing | 10 | 8 | 9 | 3 | 10 | 11 | 11 | 5 | 9 |
| Not crowded | 7 | 6 | 9 | 14 | 8 | 8 | 8 | 8 | 7 |

On the other hand, crime and gang activity continues to be the most-often mentioned *negative* factor about living in San Bernardino County (although the percentage of people mentioning crime and gang activity is down from 31% last year to 26% this year). This is followed by "smog, air pollution" and "traffic."

Table 3. Negative Factors Mentioned About the County

| | East Valley % | West Valley % | Victor Valley % | Desert % | 2005 SB County % | 2006 SB County % | 2007 / 08 SB County % | 2008/ 09 SB County % | 2010 SB County % |
|---------------------------|---------------------|---------------------|-----------------------|----------|---------------------------|---------------------------|--------------------------------|-------------------------------|---------------------------|
| Crime, gang activity | 37 | 18 | 32 | 11 | 24 | 33 | 24 | 31 | 26 |
| Traffic | 4 | 9 | 4 | 4 | 12 | 12 | 10 | 7 | 6 |
| Smog, air pollution | 8 | 11 | 2 | 2 | 10 | 8 | 9 | 9 | 8 |
| Lack of job opportunities | 7 | 3 | 15 | 7 | 3 | 1 | 3 | 5 | 7 |

While the region with the highest percentage of people mentioning crime/gang activity continues to be East Valley, the figures have declined since last year's survey in all regions except West Valley, which remained the same as last year.

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

| | East | West | Victor | | SB |
|------------------|--------|--------|--------|--------|--------|
| | Valley | Valley | Valley | Desert | 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 | O | 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 / 08 Survey | 37 | 13 | 25 | 16 | 24 |
| 2008 / 09 Survey | 43 | 18 | 40 | 14 | 31 |
| 2010 Survey | 37 | 18 | 32 | 11 | 26 |

While the public's concern about crime is important, there are other concerns on the minds of respondents (e.g. smog and traffic). 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 | West | Victor | Daniel | SB |
|------------------|--------|--------|----------|--------|--------|
| | Valley | Valley | Valley | Desert | 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 | 1 | 6 | 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 / 08 Survey | 13 | 9 | 3 | 2 | 9 |
| 2008 / 09 Survey | 10 | 12 | 2 | 2 | 9 |
| 2010 Survey | 8 | 11 | 2 | 2 | 8 |

In addition, concern about traffic in the region dropped slightly in three of the four zones this year and remained the same in the East Valley. And for the second year in a row, it was ranked lower than smog.

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 | 1 | 2 | 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 / 08 Survey | 6 | 14 | 8 | 7 | 10 |
| 2008 / 09 Survey | 4 | 10 | 6 | 5 | 7 |
| 2010 Survey | 4 | 9 | 4 | 4 | 6 |

COMMUTING

OVERVIEW: For thirteen consecutive years, the San Bernardino Annual Survey data have revealed that most respondents from each zone spend less than an hour commuting to and from work. Last year we noted that the median commute time is "inching up," however this year median commute time dropped slightly. 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).

Consistent with previous years, approximately 61% of San Bernardino County residents report that they spend less than one hour each day commuting to and from work (Question 25). But for at least some of the 39% with commute times of an hour or more, it is not unreasonable to believe that there are personal and financial consequences of their commute.

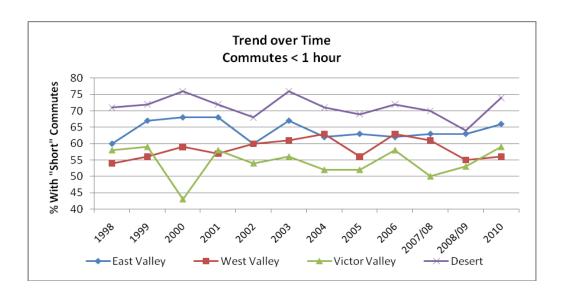
When looking at region-specific data, the percentage of people reporting short commutes has increased in all four regions, with respondents in the Desert region continuing to report the

shortest commute times, and West Valley respondents reporting the longest (surpassing Victor Valley respondents who from 2001 to 2008/09 had the longest).

The drop in commute time in all four regions is further substantiated by median commute time. Last year we reported that the median commute time was "inching up," and that this could be due to the major freeway work in the Inland Empire (particularly on the 91/60/215 freeway interchange for San Bernardino residents who work in Riverside) or lack of employment available close to home. But this year the median commute time has decreased slightly over last year.

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 | 6 | 50 | 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 / 08 Survey | 63 | 61 | 50 | 70 | 61 | 40.2 min |
| 2008 / 09 Survey | 63 | 55 | 53 | 64 | 58 | 40.0 min |
| 2010 Survey | 66 | 56 | 59 | 74 | 61 | 39.1 min |



As in the past, around two thirds of San Bernardino County respondents report that they work within San Bernardino County (Question 27), with a small increase this year in the number of people traveling *outside* the county to work. Los Angeles County is the major source of employment *outside* the county. A casual reader might note a "disconnect" in that this year there is an increased number of people traveling outside of the county to work, yet median commute times have decreased. After a careful review of the data, it is clear that many of the people crossing the county line to work live relatively close to the county line (e.g. Rancho Cucamonga or Fontana – cities close to Los Angeles County.

Table 8. San Bernardino County Respondents' Commuting Destinations, 1999-2010*

| | Work Destination (County) | | | | | | | |
|------------------|-----------------------------|---------------------|------------------|-----------------------|--|--|--|--|
| | San Bernardino County | Riverside County | Orange County | Los Angeles County | | | | |
| 1999 Survey | 73 | 6 | 3 | 15 | | | | |
| 2000 Survey | 70 | 7 | 4 | 15 | | | | |
| 2001 Survey | 69 | 8 | 4 | 16 | | | | |
| 2002 Survey | 67 | 9 | 6 | 16 | | | | |
| 2003 Survey | 69 | 7 | 5 | 16 | | | | |
| 2004 Survey | 71 | 5 | 5 | 16 | | | | |
| 2005 Survey | 72 | 5 | 4 | 17 | | | | |
| 2006 Survey | 71 | 7 | 4 | 13 | | | | |
| 2007 / 08 Survey | 70 | 7 | 4 | 15 | | | | |
| 2008 / 09 Survey | 71 | 6 | 3 | 16 | | | | |
| 2010 Survey | 64 | 6 | 6 | 20 | | | | |

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

In all four regions, the majority of working respondents stay within San Bernardino County to work. West Valley had the lowest percentage of San Bernardino County workers, with only 49% working within the county and 34% traveling to Los Angeles County to work. The small percentage of East Valley and Desert respondents who commute outside San Bernardino County tend to travel to Riverside County for work.

Table 9. In What County do you Work?*

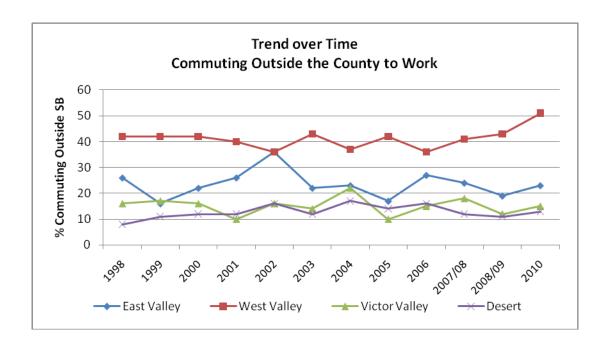
| | East Valley % | | Victor Valley % | Desert % | SB County % |
|-----------------------|---------------------|----|-----------------------|----------|-------------------|
| San Bernardino County | 77 | 49 | 85 | 87 | 64 |
| Riverside County | 10 | 3 | 2 | 6 | 6 |
| Orange County | 3 | 11 | 1 | 1 | 6 |
| Los Angeles County | 8 | 34 | 6 | 0 | 20 |

^{*} 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 the past thirteen years. As noted above, 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 | West | Victor | _ | SB |
|------------------|-------------|----------------|----------------|--------|--------|
| | Valley | Valley | Valley | Desert | County |
| | % | % | % | % | % |
| 1997 Survey | Question wa | s not asked in | the 1997 surve | ey | |
| 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 | 3 | 66 | 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 / 08 Survey | 24 | 41 | 18 | 12 | 30 |
| 2008 / 09 Survey | 19 | 43 | 12 | 11 | 29 |
| 2010 Survey | 23 | 51 | 15 | 13 | 36 |



FEAR OF CRIME AND CRIME RELATED ISSUES

OVERVIEW: Fear of being the victim of a serious crime among San Bernardino County residents reached its zenith in 2006 at 44%, and since then has dropped into the mid-30s. For the second year in a row, Victor Valley residents report being more fearful of being the victim of a serious crime than residents in any other region.

Over the years, respondents to the Annual Survey have expressed concern regarding crime and gang-related activity within the county. In fact, "crime/gang-related activity" has been overwhelmingly the most often-mentioned "negative factor" about the county for San Bernardino County respondents since the inception of the survey. This concern about crime has also consistently been 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 11 below, there continues to be variation over time in respondents' fear of crime. The percentage of respondents who reported being "very fearful" or "somewhat fearful" of being the victim of a serious crime reached a low in 2001 and then began to increase until 2006 when the fear reached the highest level since the inception of the survey in 1997. The following year it was back down to 2002 levels, and has remained at that level for the past two years.

Table 11. % "Very Fearful" or "Somewhat Fearful" of Being the Victim of a Serious Crime

| | East | West | Victor | Dogowt | SB |
|------------------|-------------|-------------|-------------|-------------|-------------|
| | Valley % | Valley % | Valley % | Desert % | 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 | 3 | 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 / 08 Survey | 44 | 31 | 32 | 29 | 36 |
| 2008 / 09 Survey | 41 | 28 | 45 | 28 | 35 |
| 2010 Survey | 37 | 35 | 38 | 29 | 36 |

Last year we noted that fear of crime increased among residents in the Victor Valley region, surpassing the East Valley region as being the most fearful of being the victim of a serious crime. This year, they continue to be more fearful than residents in any other region. Residents from the Desert region continue to be the least fearful of being the victim of a serious crime.

ECONOMIC EVALUATIONS AND FUTURE PROSPECTS

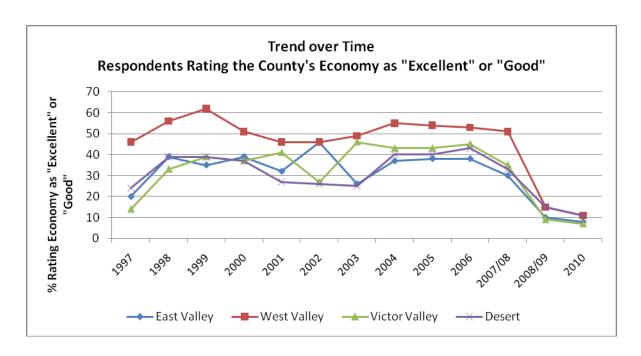
OVERVIEW: The percent of people who rated the county's economy as "excellent" or "good" continued to decline this year, despite media reports that indicate improvement within the economy. Respondents' ratings of their own financial well-being also continued to drop, with only 14% of respondents saying they are "better off" financially than last year. However, residents seem to be more optimistic about the future than last year's respondents, with 42% saying they expect to be better off financially a year from now...a figure up from 35% last year.

Last year we noted the dramatic decline in the number of San Bernardino County residents who rated the county's economy as "excellent" or "good" (down from 40% in the 2007/08 survey to 12% in the 2008/09 survey). Given the national recession and lack of jobs in

the area at that time, these ratings were understandable, but still a major concern. This year, recent media reports indicate that the economy is showing signs of improvement; however this optimism was seemingly not shared by San Bernardino County residents: only 9% rating the economy as "excellent" or "good."

Table 12. % Rating the County's Economy as "Excellent" or "Good"

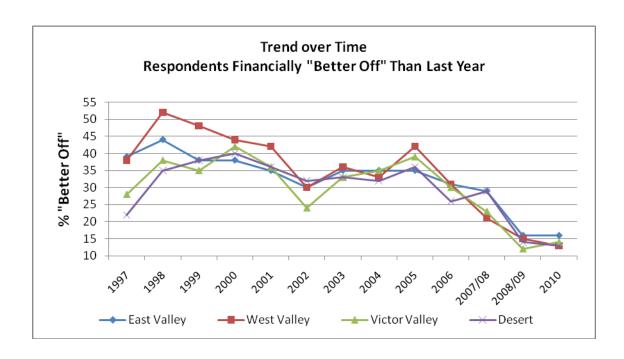
| | East Valley % | West Valley % | Victor Valley % | Desert % | SB County % |
|------------------|---------------------|---------------------|-----------------------|----------|-------------------|
| 1997 Survey | 20 | 46 | 14 | 24 | 28 |
| 1998 Survey | 39 | 56 | 33 | 39 | 45 |
| 1999 Survey | 35 | 62 | 39 | 39 | 47 |
| 2000 Survey | 39 | 51 | 37 | 37 | 44 |
| 2001 Survey | 32 | 46 | 41 | 27 | 39 |
| 2002 Survey | 4 | 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 / 08 Survey | 30 | 51 | 35 | 33 | 40 |
| 2008 / 09 Survey | 10 | 15 | 9 | 15 | 12 |
| 2010 Survey | 8 | 11 | 7 | 11 | 9 |



Not only did the vast majority of respondents hold a bleak view of the county's economy, but they also reported being less financially well-off *personally* this year. Indeed, even before the official announcement of a recession in December 2007, Inland Empire residents were reporting being less well-off than the previous year (Question 6). This year, only 14% of San Bernardino County respondents reported feeling that they are better off (down slightly from 15% last year and down significantly from 2007/08 figure of 25%). Thus this year's respondents clearly are still reeling from the effects of the current recession even in the presence of some current economic indicators pointing towards economic growth in the Inland Empire. But this growth is not being reflected in job creation and increasing rates of employment, which may account for our respondents' diminished sense of economic well-being.

Table13.
% Indicating Their Finances Are "Better Off" Compared With a Year Ago

| 76 Indicating Then Finances Are Detter On Compared with a Teal 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 | 3 | 0 | 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 / 08 Survey | 29 | 21 | 23 | 29 | 25 | | | | |
| 2008 / 09 Survey | 16 | 15 | 12 | 14 | 15 | | | | |
| 2010 Survey | 16 | 13 | 14 | 13 | 14 | | | | |



Although the respondents are pessimistic about their current financial well-being, they appear to be slightly more optimistic about their future this year as opposed to last year. Specifically, 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), this year, 42% expect to be better off financially a year from now – as compared to 35% last year. The percentage of people expecting their finances to be worse in the coming year dropped slightly from last year, with Victor Valley and Desert respondents continuing to show slightly more pessimism than East or West Valley respondents.

Table 14. 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 | 2006 SB County % | 2007/08 SB County % | 2008/09 SB County % | 2010 SB County % |
|------------|---------------------|---------------------|-----------------------|--------|---------------------------|------------------------------|------------------------------|---------------------------|
| Better off | 43 | 45 | 36 | 33 | 51 | 43 | 35 | 42 |
| Same | 45 | 43 | 43 | 44 | 41 | 48 | 47 | 44 |
| Worse off | 12 | 11 | 22 | 23 | 8 | 9 | 18 | 14 |

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

In summary, then, perhaps the recent signs of recovery in the local economy may be generating some increased optimism among our respondents concerning their future economic prospects, but appear to have little impact on their current sense of well-being.

EVALUATIONS OF SELECTED PRIVATE AND PUBLIC SERVICES

OVERVIEW: Ratings of private and public services have not changed significantly over time, 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.

Since 1999, the Inland Empire 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 15. "Excellent" or "Good" Ratings of Services

| SERVICE | 1999 % | 2000 % | 2001 % | 2002 % | 2003 % | 2004 % | 2005 | 2006 % | 2007 / 08 | 2008 / 09 | 2010 % |
|----------------------------|-----------|--------|-----------|-----------|-----------|-----------|------|-----------|--------------|-----------|-----------|
| Shopping | 68 | 63 | 68 | 70 | 66 | 66 | 65 | 68 | 68 | 62 | 64 |
| Police/Sheriff | 70 | 64 | 66 | 71 | 69 | 63 | 61 | 61 | 61 | 68 | 68 |
| Parks/Recreation | 60 | 58 | 58 | 58 | 56 | 55 | 56 | 59 | 57 | 61 | 60 |
| Public Schools | 46 | 41 | 45 | 51 | 46 | 37 | 43 | 49 | 43 | 46 | 43 |
| Entertainment | 49 | 43 | 46 | 49 | 49 | 46 | 44 | 47 | 50 | 46 | 48 |
| Transportation | N/A | 36 | 42 | 40 | 38 | 36 | 37 | 42 | 36 | 42 | 40 |
| Street/Road Maintenance | 38 | 33 | 34 | 39 | 35 | 25 | 28 | 30 | 32 | 32 | 32 |

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. While perceptions of police/sheriff services have remained relatively high, they

had started to decline somewhat in 2004. Over the past two years, however, they are back up to 2003 levels, and are rated higher than shopping.

As noted in previous reports, perceptions of street/road maintenance and transportation continue to remain low. Over the years we have voiced the concern of the average citizen, and we must once again report low ratings which have not improved over time. Whether or not these ratings are accurate representations of the true state of street and road maintenance, they *are* accurate representations of respondents' perceptions, thus it might be worthwhile for government officials to acknowledge and address these perceptions.

Table 16 below shows the regional breakdowns of ratings in services, comparing 2009 to 2010. 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 16. % Rating Local Services as "Good" or "Excellent"

| | East Valley % | | West Valley % | | Victor Valley % | | Desert % | |
|-------------------------|---------------|------|------------------|------|--------------------|------|-------------|------|
| | 2009 | 2010 | 2009 | 2010 | 2009 | 2010 | 2009 | 2010 |
| Shopping | 48 | 52 | 82 | 84 | 53 | 50 | 32 | 31 |
| Police/Sheriff | 63 | 63 | 78 | 76 | 55 | 58 | 56 | 57 |
| Parks/Recreation | 49 | 50 | 75 | 74 | 49 | 43 | 53 | 51 |
| Entertainment | 34 | 39 | 64 | 64 | 32 | 31 | 25 | 28 |
| Public Schools | 41 | 35 | 53 | 52 | 42 | 35 | 36 | 39 |
| Local Transportation | 38 | 44 | 51 | 42 | 31 | 28 | 39 | 35 |
| Street/Road Maintenance | 21 | 21 | 48 | 48 | 21 | 21 | 17 | 18 |

ENVIRONMENTAL ISSUES:

LIFESTYLE/LIFECYCLE PREFERENCES AND BEHAVIOR

OVERVIEW: Air pollution was the most-often-mentioned environmental issue facing the Inland Empire today, and most are willing to see tougher pollution standards on vehicles even if it costs them more to purchase or lease their next vehicle. Three-quarters of respondents are concerned about global warming, and most think it has already begun to happen. About a third of respondents report using public transportation, ridesharing, walking, or bicycling at least once a month.

This year, SANBAG asked a series of questions regarding environmental issues. In response to the question: "What do you think is the most critical environmental issue facing the Inland Empire today?" (Question SANBAG1), the most-often mentioned issue was air pollution / vehicle emissions (36%), followed by the water supply / drought (22%), and pollution in general (10%). Within the zones, respondents' answers often reflected the distinctive nature of the regions. For example, East and West Valley respondents were more concerned about air pollution and vehicle emissions than were those in the Victor Valley and Desert. As might be expected, Desert respondents were more concerned about water issues (water supply/drought and water pollution categories combined) than those in the other regions.

Table 17. What Do You Think is the Most Critical Environmental Issue Facing the Inland Empire Today?

| imanu Empire Today: | | | | | | | | | |
|---|---------------------|---------------------|-----------------------|-------------|-------------------|--|--|--|--|
| | East Valley % | West Valley % | Victor Valley % | Desert % | SB County % | | | | |
| Air pollution, vehicle emissions | 36 | 40 | 29 | 20 | 36 | | | | |
| Water supply, drought | 22 | 22 | 21 | 22 | 22 | | | | |
| Pollution in general | 11 | 8 | 12 | 12 | 10 | | | | |
| Landfill, garbage | 3 | 4 | 9 | 8 | 5 | | | | |
| Loss of forests, forest fires, wildfires | 3 | 5 | 2 | 4 | 4 | | | | |
| Water pollution | 3 | 2 | 4 | 8 | 3 | | | | |
| Growth, overdevelopment, overpopulation | 4 | 3 | 3 | 3 | 3 | | | | |
| Global warming, global climate change, greenhouse gases | 3 | 2 | 1 | 6 | 3 | | | | |

Further, most respondents said they are "somewhat concerned" (43%) or "very concerned" (33%) about greenhouse gas and global warming (Question SANBAG2). The highest level of concern was expressed by respondents in the East and West Valley.

Table 18. How Concerned Are You About Greenhouse Gas and Global Warming?

| | East Valley % | West Valley % | Victor Valley % | Desert % | SB County % |
|----------------------|---------------------|---------------------|-----------------------|-------------|-------------------|
| Very concerned | 35 | 35 | 25 | 33 | 33 |
| Somewhat concerned | 39 | 47 | 44 | 35 | 43 |
| Not at all concerned | 26 | 18 | 32 | 33 | 24 |

When asked how long they think it will take before the effects of global warming will begin to happen (Question SANBAG3), most respondents (57%) believe it has already begun to happen or will happen sometime during their lifetime (12%). Only 16% think it will never happen.

Table 19. How Long Do You Think it Will Take Before the Effects of Global Warming Will Begin to Happen?

| | East Valley % | West Valley % | Victor Valley % | Desert % | SB County % |
|--|---------------------|---------------------|-----------------------|-------------|-------------------|
| Already begun to happen | 56 | 60 | 51 | 53 | 57 |
| Within a few years | 6 | 6 | 5 | 7 | 6 |
| Within your lifetime | 6 | 6 | 8 | 5 | 6 |
| Not within your lifetime, but will affect future generations | 15 | 16 | 13 | 16 | 15 |
| Will never happen | 17 | 13 | 24 | 20 | 16 |

Moreover, concerns about the environment were clearly expressed with 70% of respondents indicating that they would be willing to see tougher air pollution standards on new passenger cars, light trucks, and SUVs (Question SANBAG5). Respondents from the West Valley were the most willing to support tougher air pollution standards on new vehicles (74%) and residents from Victor Valley were the least willing (62%).

Table 20. Would You be Willing to See Tougher Air Pollution Standards on New Passenger Cars, Light Trucks and SUV's?

| | East Valley % | West Valley % | Victor Valley % | Desert % | SB County % |
|-------|---------------------|---------------------|-----------------------|-------------|-------------------|
| Yes | 68 | 74 | 62 | 66 | 70 |
| No | 28 | 22 | 34 | 30 | 26 |
| Maybe | 4 | 4 | 4 | 4 | 4 |

But were our respondents willing to pay for more environmentally friendly vehicles? The 70% who answered "yes" to the above question were asked, "would this be true even if it made it more costly for you to purchase or lease your next vehicle?", and the vast majority of them said yes (80%). Again, East and West Valley residents are the most likely to support these tougher air pollution standards on new vehicles regardless of cost, and those from Victor Valley are the least likely. Of course, the amount of additional cost may affect the level of support. Next year's survey will address the level of additional cost respondents would be willing to tolerate.

Table 21. Would This Be True Even If It Made It More Costly For You To Purchase or Lease Your Next Vehicle?

| | East Valley % | West Valley % | Victor Valley % | Desert % | SB County % |
|-------------------------------|---------------------|---------------------|-----------------------|-------------|-------------------|
| Yes | 80 | 82 | 71 | 75 | 80 |
| Possibly, depends on the cost | 9 | 8 | 14 | 11 | 9 |
| No | 11 | 10 | 15 | 14 | 11 |

Respondents were also asked a question regarding forms of transportation other than driving a car alone: "In the past year, how often have you used transit bus, commuter train, ridesharing, walking, or a bicycle instead of driving your car alone?" (Question SANBAG4). The good news is that about a third (32%) report that at least once a month they use public

transportation, share a ride, walk, or bicycle as opposed to driving alone. On the down side, almost half (45%) said they "never" use public transportation, share a ride, walk, or bicycle.

When looking at regional differences, residents from Victor Valley are the least likely to have used public transportation while residents from the West Valley are the most likely.

Table 22. In the Past Year, How Often Have You Used Transit Bus, Commuter Train, Ridesharing, Walking, or a Bicycle Instead of Driving Your Car Alone?

| Tuttesmaring, vvaning | East Valley % | West Valley % | Victor Valley % | Desert % | SB County % |
|------------------------------|---------------------|---------------------|-----------------------|----------|-------------------|
| Never | 47 | 41 | 53 | 46 | 45 |
| Once this past year | 4 | 4 | 4 | 4 | 4 |
| A few times a year | 15 | 18 | 12 | 16 | 16 |
| At least once a month | 12 | 11 | 9 | 8 | 11 |
| At least once a week | 11 | 14 | 14 | 11 | 13 |
| Daily | 6 | 10 | 4 | 10 | 8 |
| Don't Drive/Don't have a car | 5 | 2 | 4 | 6 | 4 |

Finally, respondents were asked a series of questions about the type of housing and area they currently live in (Questions SANBAG7 and SANBAG8) and where they would prefer to live in 10 years (Questions SANBAG9 and SANBAG10). Not surprisingly, the vast majority of people throughout the county report that they currently live in a single family home (81%) (Table 23).

Table 23. Do You Live in an Apartment, Condo, or Single-Family Home?

| | East Valley % | West Valley % | Victor Valley % | Desert % | SB County % |
|--------------------|---------------------|---------------------|-----------------------|-------------|-------------------|
| Apartment | 11 | 8 | 7 | 9 | 9 |
| Condo | 3 | 8 | 2 | 1 | 5 |
| Single-family home | 79 | 81 | 87 | 81 | 81 |
| Townhouse/townhome | 1 | 1 | <1 | <1 | 1 |
| Mobile Home | 6 | 2 | 3 | 6 | 4 |
| Other | <1 | <1 | <1 | 3 | 1 |

Moreover, the standard lifecycle considerations are strong predictors of the type of housing selected. Simply consider age. The following table (Table 24) shows that 23% of young respondents (18 - 24 years old) currently live in an apartment, but by the time they are 25 - 34 years of age this figure drops dramatically to 9%. Home ownership increases from 72% among 18 - 24 year olds to 87% of 45 - 54 year olds, and then begins to decline back to 72% of older respondents (75 years old or older) living in single-family houses. Similar anticipated trends are seen when such other lifecycle variables (i.e. education, marital status, and income) are taken into account.

Table 24. Type of Housing Broken Down By Age Cohort

| | 18 - 24 | 25 - 34 | 35 - 44 | 45 - 54 | 55 - 64 | 65 - 74 | 75 or older |
|--------------------|-----------|---------|---------|---------|---------|---------|-------------|
| | years old | | | | | | |
| Apartment | 23% | 9% | 12% | 7% | 6% | 4% | 12% |
| Single-family home | 72% | 76% | 82% | 87% | 86% | 81% | 72% |

Over one-half (52%) of San Bernardino County respondents report that they currently live in the outskirts of a city, and 46% in a densely populated area (Table 25). Of course, there are some regional differences, with West Valley having the highest percentage of people living in densely populated areas and Victor Valley and Desert having the lowest.

Table 25. Do You Live in a Densely Populated Neighborhood Centrally Located to be Within Walking Distance of Dining and Schools, or in An Area Where You

Depend on a Vehicle To Get To Shopping or Schools?

| | East Valley % | West Valley % | Victor Valley % | Desert % | SB County % |
|---------------------|---------------------|---------------------|-----------------------|-------------|-------------------|
| Densely populated | 45 | 57 | 28 | 27 | 46 |
| Outskirts of a city | 54 | 42 | 70 | 72 | 52 |
| Other | 1 | 2 | 2 | 1 | 1 |

Projecting into the future, the vast majority of respondents reported that they anticipate preferring to live in a single-family home in 10 years (Table 26), and the majority (53%) anticipate living in a densely populated area in 10 years (Table 27).

Table 26. What Type Of Housing Do You Think You Will Prefer To Live In 10 Years?

| | East Valley % | West Valley % | Victor Valley % | Desert % | SB County % |
|--------------------|---------------------|---------------------|-----------------------|-------------|-------------------|
| Apartment | 5 | 4 | 4 | 4 | 4 |
| Condo | 10 | 12 | 4 | 4 | 10 |
| Single-family home | 82 | 83 | 89 | 85 | 84 |
| Townhouse/townhome | <1 | 0 | <1 | <1 | <1 |
| Mobile Home | 2 | 1 | 1 | 4 | 1 |
| Other | 2 | 1 | 1 | 2 | 1 |

Table 27. In 10 Years Will You Want To Live in a Densely Populated Neighborhood Centrally Located to be Within Walking Distance of Dining and Shopping and Schools, or in An Area Where You Depend on a Vehicle To Get To Shopping or Schools?

| | East Valley % | West Valley % | Victor Valley % | Desert % | SB County % |
|---------------------|---------------------|---------------------|-----------------------|-------------|-------------------|
| Densely populated | 53 | 60 | 38 | 39 | 53 |
| Outskirts of a city | 45 | 40 | 59 | 57 | 45 |
| Other | 2 | <1 | 3 | 4 | 2 |

CONFIDENCE IN ELECTED OFFICIALS

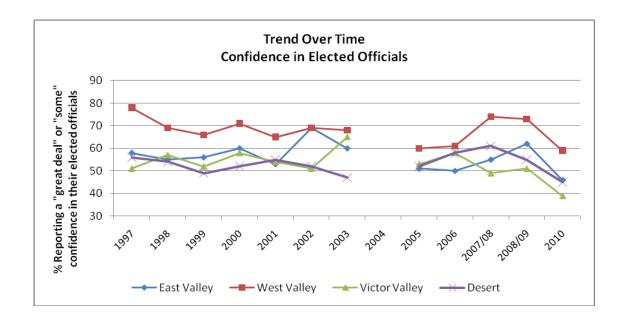
OVERVIEW: Confidence in elected officials is at an all time low, both countywide and in all four regions.

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). As noted in Table 28 below, residents' confidence in their elected officials is at an all time low (51%). We offer two possible explanations for this significant drop: First, there has been a plethora of media coverage alleging various "crimes and misdemeanors" of various prominent local elected officials. In addition, it is a well-known fact that even if local elected officials have little control over economic recession, they tend to be held responsible for it nonetheless by the general public.

The decline in confidence in their elected officials is seen in all four regions. As in previous years, confidence remains highest among West Valley residents (59% - down from 73% last year) and lowest among Victor Valley residents (39% - down from 51% last year).

Table 28. % 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 | 6 | 59 | 51 | 52 | 66 |
| 2003 Survey | 60 | 68 | 65 | 47 | 63 |
| 2004/05 Survey | Q | uestion was i | not asked on tl | nis year's sur | vey |
| 2005 Survey | 51 | 60 | 53 | 52 | 55 |
| 2006 Survey | 50 | 61 | 58 | 58 | 56 |
| 2007/08 Survey | 55 | 74 | 49 | 61 | 63 |
| 2008/09 Survey | 62 | 73 | 51 | 55 | 65 |
| 2010 Survey | 46 | 59 | 39 | 45 | 51 |



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. Between 2002 and 2006, IAR surveyed only San Bernardino County respondents. For the last three years Riverside County has once again been included in the Annual survey.

This section of the report includes the highlights of the Riverside County findings and trends over time. The chapter is divided by conceptual category (e.g. ratings of the county, commuting, jobs and housing, fear of crime and crime-related issues, economic evaluation and future prospects, evaluations of selected private and public services, and confidence in elected officials). A full data display of frequency distributions is shown in Appendix IV.

RATINGS OF THE COUNTY

OVERVIEW: The majority of residents in Riverside County continue to rate their county as a good place to live, although the overall rating is down slightly from last year. Respondents cited "good area/location/scenery," and "good climate" as positive aspects of the county, and some also cited factors such as affordable housing, lack of crowds, and friendly people. Traffic continues to be a major concern among Riverside County respondents.

Over the years, the majority of respondents in Riverside County have rated their county as either a "very good" or "fairly good" place to live, and this year is no exception (although the percentage of respondents giving it this rating is down slightly from last year.) (Question 3 -- Table 29).

Table 29. % 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 / 08 Annual Survey | 77 |
| 2008 / 09 Annual Survey | 81 |
| 2010 Annual Survey | 77 |

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). One out of every four residents in Riverside mentioned "good area/location/scenery" as the most positive aspect of living in the county (Table 20), followed by "climate/weather" (22%). "Affordable housing" was also mentioned by some respondents (6%), as was the fact that the area is "not crowded" (5%). Further, 7% of people said the people are friendly and 6% said it is a "family atmosphere." These figures have been relatively consistent over time.

Table 30. Positive Factors Mentioned About the County

| | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2007 | 2008 | 2010 |
|------------------------------|------|------|------|------|------|-----------|-----------|-----------|------|
| | % | % | % | % | % | - 06 % | / 08 % | / 09 % | % |
| Good area, location, scenery | 24 | 24 | 19 | 25 | 30 | * | 29 | 27 | 25 |
| Good climate, weather | 17 | 16 | 15 | 17 | 20 | * | 19 | 22 | 22 |
| Good / friendly people | ı | - | 1 | 5 | 5 | * | 4 | 3 | 7 |
| Family atmosphere | 1 | - | i | - | - | * | 1 | 3 | 6 |
| Affordable housing | 5 | 5 | 6 | 6 | 9 | * | 9 | 7 | 6 |
| Not crowded | 7 | 4 | 5 | 5 | 8 | * | 10 | 8 | 5 |

^{*} No Data Available

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 31), followed by the "usual suspects" – discontent with crime, smog, and weather. There was one notable exception this year, however. For the first time, lack of job opportunities was cited as the most important negative factor by a substantial group of respondents (6%).

Table 31. Negative Factors Mentioned About the County

| Tuble 211 (egative Tuestolls Wildingtonea History | | | | | | | | | |
|---|-----------|-----------|-----------|------|-----------|-------------------|-------------------|-------------------|-----------|
| | 1997 % | 1998 % | 1999 % | 2000 | 2001 % | 2002 - 06 % | 2007 / 08 % | 2008 / 09 % | 2010 % |
| Traffic | 5 | 8 | 9 | 14 | 12 | * | 20 | 19 | 18 |
| Crime, gang activity | 14 | 16 | 13 | 14 | 11 | * | 11 | 13 | 9 |
| Smog, air pollution | 14 | 9 | 11 | 11 | 16 | * | 9 | 13 | 8 |
| Weather | 9 | 8 | 7 | 8 | 5 | * | 9 | 7 | 7 |
| Lack of job opportunities | * | * | * | * | 2 | * | 3 | 4 | 6 |

^{*}No data available

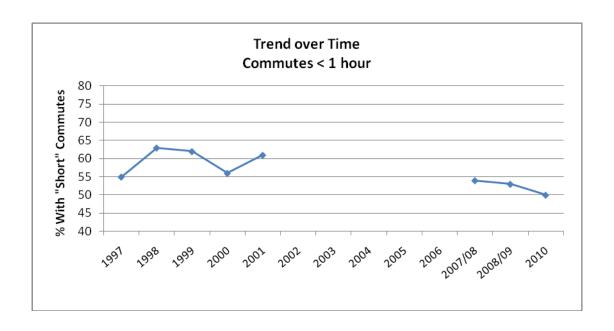
COMMUTING

OVERVIEW: Commute time among Riverside County residents is up this year. Fewer people are spending less than an hour commuting to work and the median commute time rose from 44.1 minutes last year to 50.3 minutes this year. Most Riverside County residents report working within their own county, however more are traveling to Los Angeles County and San Diego County to work.

In the earlier years of this report (1997 to 2001), the length of reported commuting times among Riverside County residents 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). However, that number has dropped over the last three years, and has reached an all time low of 50% this year. In addition, there was an increase in those traveling between 2 and 4 hours each day, and the median commute time rose significantly this year. Bottom line: Riverside County residents are spending more time in their cars commuting to work.

Table 32. Total Round Trip Commute Time of Riverside County Respondents
Who Are Employed Outside the Home

| Year of Survey | Less than 1 | 1 - < 2 Hours | 2 - < 3 Hours | 3 - < 4 Hours | 4 Hours or More | Median Commute |
|-------------------------|----------------|------------------|------------------|------------------|--------------------|-------------------|
| | Hour % | % | % | % | % | Time |
| 1997 Annual Survey | 55 | 23 | 12 | 6 | 5 | 39.8 min |
| 1998 Annual Survey | 63 | 22 | 10 | 3 | 2 | 38.6 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 | 36.3 min |
| 2002 - 2006 | | | No Data | Available | | |
| 2007 / 08 Annual Survey | 54 | 25 | 14 | 4 | 3 | 39.2 min |
| 2008 / 09 Annual Survey | 53 | 31 | 9 | 4 | 3 | 44.1 min |
| 2010 Annual Survey | 50 | 28 | 14 | 6 | 3 | 50.3 min |

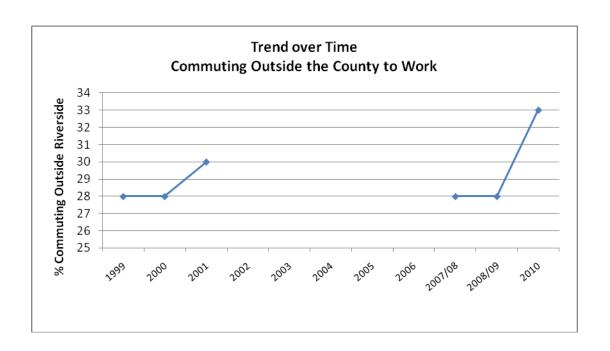


As shown in Table 33, the majority of respondents who commute to work reported that they travel to work within their own county. However this year the percentage working within Riverside County dropped from 72% to 67% while the percentage of people traveling to Los Angeles County and San Diego County rose to 7% (from 3%) and 5% (from 1%) respectively. These findings, in concert with the lack of job availability within the county mentioned earlier, therefore, have implications not only for increased traffic on the road but also increased commute time.

Table 33. Riverside County Respondent Commuting Destinations

| Work Destination | 1999 | 2000 | 2001 | 2002 – 06 | 2007 / 08 | 2008 / 09 | 2010 % |
|---------------------|------|------|------|--------------|--------------|--------------|-----------|
| County | % | % | % | % | % | % | |
| Riverside | 72 | 72 | 70 | * | 72 | 72 | 67 |
| San Bernardino | 9 | 9 | 10 | * | 8 | 11 | 10 |
| Orange | 7 | 7 | 10 | * | 7 | 10 | 9 |
| Los Angeles | 5 | 5 | 5 | * | 5 | 3 | 7 |
| San Diego | 3 | 4 | 3 | * | 3 | 1 | 5 |
| Other | 4 | 2 | 2 | * | 5 | 3 | 2 |

^{*} No data available



RIVERSIDE COUNTY ECONOMIC ISSUES (JOBS AND HOUSING)

OVERVIEW: The number of Riverside County respondents who said they would turn to the Workforce Development Center to upgrade their work skills rose from 6% last year to 11% this year. On the other hand, awareness that Riverside County offers this service has declined. Of those who commute outside the county, the major reason for doing so is that they can't find a job in Riverside County. The number of respondents who have lost or know someone who has lost their home in the current housing market rose significantly this year, as did the number who are concerned that they might lose their home in the near future.

For the past two years Riverside County Economic Development Agency/Workforce Development Center (EDAWC) has included questions on the survey which focus on Riverside County respondents' thoughts regarding various jobs and housing issues. 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). While most said they would go to a community college (42%), turn to the internet (28%) or go to a private proprietary school (15%), a sizable group (11%) said they would go to a Workforce Development Center. Further it is encouraging for EDA that the 11% is a sizable increase over last year's 6% figure.

Table 34. 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?

| 9 | 2008 / 09 | 2010 |
|------------------------------|-----------|------|
| | % | % |
| Community College | 48 | 42 |
| Internet | 31 | 28 |
| Private Proprietary School | 12 | 15 |
| Workforce Development Center | 6 | 11 |
| Other | 4 | 4 |

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). Two out of three respondents (66%) indicated that they were not aware that this service is being provided.

Table 35. Before this survey, did you know that Riverside County provides job information and training through workforce development centers, sometimes called onestop career centers?

| stop curver conters. | | | | |
|----------------------|-----------|------|--|--|
| | 2008 / 09 | 2010 | | |
| | % | % | | |
| Yes | 38 | 34 | | |
| No | 62 | 66 | | |

In order to determine the affect 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). As seen in the table below, the number of people who have been affected (either personally or through acquaintances) by the housing crisis has risen significantly over the past year.

Table 36. Have you or someone you know lost their home in the current housing market?

| then home in the current housing marnett | | | | |
|--|-----------|------|--|--|
| | 2008 / 09 | 2010 | | |
| | % | % | | |
| Yes | 50 | 64 | | |
| No | 50 | 36 | | |

Personalizing the issue even further, respondents were asked "How concerned are you that you might lose your home in the near future?" (Question EDAWC4) and 58% said they are "not at all concerned." On the other hand, 20% indicated that they are *very* concerned, a figure up from 13% last year. Clearly the economy and the housing market crisis are continuing to take their toll on Riverside County residents.

Table 37. How concerned are you that you might lose your home in the near future?

| | 2008 / 09 | 2010 % |
|----------------------|-----------|-----------|
| Very Concerned | 13 | 20 |
| Somewhat Concerned | 19 | 22 |
| Not at all Concerned | 68 | 58 |

Finally, respondents who leave the county for work were asked "What is your reason for commuting instead of working in the area?" (Question EDAWC6) and 63% said it is because of "job availability" or that they can't find a job in Riverside County. This is up significantly from last year and is consistent with the increase in both commute time and the number of residents commuting to other counties to work that was discussed earlier in this report.

Table 38. What is your reason for commuting instead of working in the area?

| | 2008 / 09 | 2010 |
|--|-----------|------|
| | % | % |
| Money: | 25 | 11 |
| Equivalent jobs in Riverside don't pay as well | | |
| Job availability: | 48 | 63 |
| Can't find a job here | | |
| Housing: | 8 | 6 |
| Can't find an affordable home where I work | | |
| Other | 34 | 20 |
| | | |

When the traffic and commuting data are linked it is clear that people are being forced to look outside the county for work.

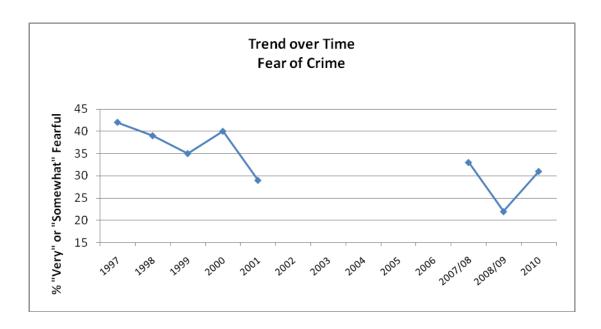
FEAR OF CRIME AND CRIME RELATED ISSUES

OVERVIEW: Fear of being the victim of a serious crime rose from 22% last year to 31% this year in Riverside County, returning to 2007/08 levels.

Last year we noted that the proportion of Riverside respondents indicating they are "somewhat fearful" or "very fearful" of being the victim of a serious crime had dropped to an all-time low of 22%. This year, fear of crime is back up to 31% (virtually 2007/08 levels), suggesting that perhaps last year's figure was an anomaly.

Table 39. % 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 / 08 Annual Survey | 33 |
| 2008 / 09 Annual Survey | 22 |
| 2010 Annual Survey | 31 |



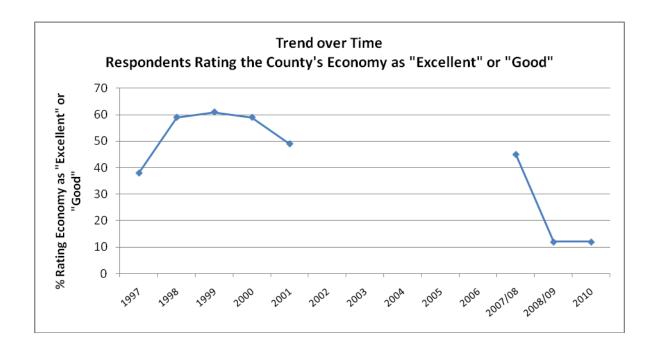
ECONOMIC EVALUATIONS AND FUTURE PROSPECTS

OVERVIEW: Respondents in Riverside County continue to feel the effects of the economic recession. Ratings of the economy are still down significantly among county residents, however residents appear to be somewhat less pessimistic about their own finances than last year. There is a slight increase in the number of residents who said that they are better off financially than they were a year ago, and in the number of respondents who expect to be better off next year.

Last year we noted the dramatic decline in the number of Riverside County residents who rated the county's economy as "excellent" or "good" (down from 45% in the 2007/08 survey to 12% in the 2008/09 survey). Given the national recession and lack of jobs in the area at that time, these ratings were understandable, but still a major concern. This year, despite recent media reports indicating that the economy is showing signs of improvement, apparently such a recovery is not being felt by Riverside County residents as, once again, only 12% rate the economy as "excellent" or "good."

Table 40: % of Riverside County Respondents Rating the Economy as "Excellent" or "Good"

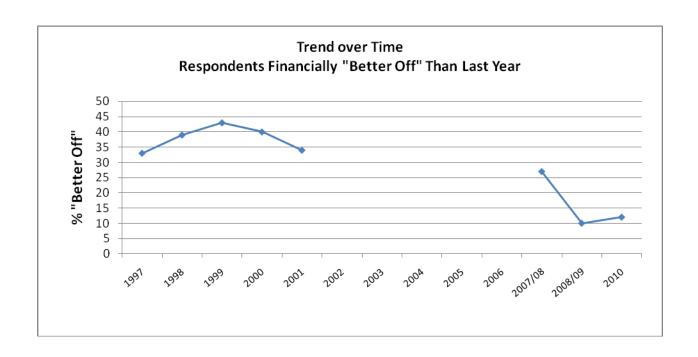
| Year of Survey | % |
|---------------------------------|----|
| 1997 Annual Survey | 38 |
| 1998 Annual Survey | 59 |
| 1999 Annual Survey | 61 |
| 2000 Annual Survey | 59 |
| 2001 Annual Survey | 49 |
| 2002 – 2006: Data not available | |
| 2007 / 08 Annual Survey | 45 |
| 2008 / 09 Annual Survey | 12 |
| 2010 Annual Survey | 12 |



Further, as another indication of the extent of the current recession and its impact on county residents can be found in responses 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 12% of Riverside County respondents (up slightly from 10% last year) reported feeling that they are better off.

Table 41: % 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 / 08 Annual Survey | 27 |
| 2008 / 09 Annual Survey | 10 |
| 2010 Annual Survey | 12 |



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 three years this optimism has declined. On the other hand, we must note that optimism among Riverside County residents is up to 41% from 34% last year, possibly indicating that the news reports stating that the economy is showing signs of improvement may be ringing true to Riverside County residents.

Table 42. 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 / 2008 Annual Survey | 49 | 41 | 11 |
| 2008 / 2009 Annual Survey | 34 | 51 | 16 |
| 2010 Annual Survey | 41 | 41 | 19 |

EVALUATIONS OF SELECTED PRIVATE AND PUBLIC SERVICES

OVERVIEW: Ratings of Riverside County's private and public services have been relatively consistent over the past thirteen years, with high marks continuing to be given to police/sheriff services and shopping, and low marks given 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 remarkable stability in ratings with Police/Sheriff given the highest rating and street/roads maintenance the lowest. The low ratings of transportation and of street and road maintenance have been consistently low since the inception of the survey, thus it would be worthwhile for government officials to make special efforts to address the problems in these areas, even in this recessionary period.

The following table details the percentage of respondents who indicate that the services are "excellent" or "good" (Questions 14 to 20).

Table 43. % of Riverside County Respondents Rating Service as "Excellent" or "Good"

| | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2007 | 2008 / | 2010 |
|----------------------------|------|------|------|------|------|------|------|--------|----------|
| | % | % | % | % | % | - 06 | / 08 | 09 | % |
| SERVICE | | | | | | % | % | % | |
| Police/Sheriff | 62 | 69 | 69 | 66 | 72 | * | 62 | 76 | 71 |
| Shopping | * | 65 | 68 | 66 | 71 | * | 69 | 69 | 68 |
| Parks/Recreation | 58 | 60 | 61 | 63 | 60 | * | 63 | 67 | 64 |
| Public Schools | 45 | 45 | 46 | 46 | 47 | * | 47 | 52 | 52 |
| Entertainment | * | 43 | 49 | 41 | 50 | * | 51 | 52 | 52 |
| Transportation | * | * | * | 38 | 42 | * | 33 | 39 | 40 |
| Street/Road Maintenance | 36 | 44 | 47 | 44 | 43 | * | 40 | 34 | 39 |

^{*}No data Available

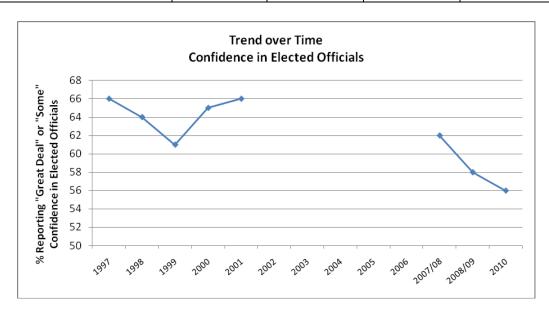
CONFIDENCE IN ELECTED OFFICIALS

OVERVIEW: Confidence in elected officials is at an all time low in Riverside County

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, there has been a decline over the past two years 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 this year it is now down to an all time low of 55% (Table 44).

Table 44. % of Respondents who have a "Great Deal" or "Some" Confidence in their Elected Officials

| Year of Survey | A Great Deal of | Some Confidence | Not Much Confidence | No Confidence |
|-------------------------|--------------------|--------------------|------------------------|------------------|
| | 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 / 08 Annual Survey | 12 | 50 | 24 | 13 |
| 2008 / 09 Annual Survey | 9 | 49 | 26 | 15 |
| 2010 Annual Survey | 8 | 47 | 28 | 17 |



CHAPTER 4: TWO-COUNTY COMPARISONS

In this section of the report we present the highlights of the two-county comparisons. 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 V.

RATINGS OF THE COUNTY

OVERVIEW: The majority of residents in both counties continue to rate their county as a good place to live, with Riverside County residents giving it a slightly higher rating than those in San Bernardino County. As with previous surveys, 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. 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 45 below shows that this is still the case, with 77% of Riverside County and 65% of San Bernardino County respondents indicating that their county is a "very good" or "fairly good" place to live.

Table 45. % Respondents Indicating Their County is a "Very Good" or "Fairly Good" Place to Live

| | Riverside County % | SB County % |
|----------------------|--------------------------|-------------------|
| Very good | 32 | 18 |
| Fairly good | 45 | 47 |
| Neither good nor bad | 18 | 23 |
| Fairly bad | 3 | 6 |
| Very Bad | 2 | 5 |

Ratings in both counties dropped slightly this year, and Riverside County residents continue to be more positive overall – a pattern that has persisted since 1997 (See Table 46).

Table 46. % Respondents Indicating Their County is a "Very Good" or "Fairly Good" Place to Live

| Good of Tuning Good Times to Elive | | | | |
|------------------------------------|--------------------------|-------------------|--|--|
| | 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 | | |
| 2010 Annual Survey | 77 | 65 | | |

To help put the above ratings in context, respondents were asked to indicate the one BEST and one MOST NEGATIVE thing about living in the county (Questions 4 and 5). Respondents in both counties mentioned "good area/location/scenery" as the most positive aspect of living in the county (Table 47). However San Bernardino County respondents are more likely to see this as the most positive aspect of living in the county while more residents from Riverside County than San Bernardino County mentioned "climate/weather." As in previous years, "affordable housing" and "not crowded" were also mentioned by a significant group of respondents (especially in San Bernardino County). For the first time, however, "friendly people" and "family atmosphere" were also mentioned by a significant number of residents.

Table 47. Positive Factors Mentioned About the County

| | Riverside County % | SB County % |
|------------------------------|--------------------------|-------------------|
| Good area, location, scenery | 25 | 37 |
| Good climate, weather | 22 | 13 |
| Friendly people | 7 | 3 |
| Family atmosphere | 6 | 5 |
| Affordable housing | 6 | 9 |
| Not crowded | 5 | 7 |

Although residents of the two counties agree on many issues, there continue to be significant differences in their perceptions regarding "the most negative thing about living in the county" (Table 48). Specifically, San Bernardino County respondents have consistently perceived crime and gang activity to be the area's worst negative factor, while Riverside County respondents have been more concerned about traffic.

Table 48. Negative Factors Mentioned About the County

| | Riverside County % | SB County % |
|---------------------------|--------------------------|-------------------|
| Traffic | 18 | 6 |
| Crime, gang activity | 9 | 26 |
| Smog, air pollution | 8 | 8 |
| Weather | 7 | 4 |
| Lack of job opportunities | 6 | 6 |

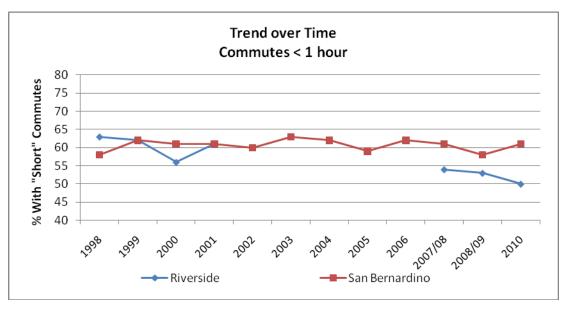
COMMUTING

OVERVIEW: Commuting patterns of San Bernardino residents has not changed significantly from previous years. However, commute time among Riverside County residents has increased as more of them are commuting outside their county to work.

A significantly higher percentage of respondents from San Bernardino County as opposed to Riverside County have short (less than one hour) round trip commutes to and from work (Question 25).

Table 49. Total Round Trip Commute Time of People Who Are Employed Outside the Home

| | Riverside County % | SB County % |
|------------------|--------------------------|-------------------|
| Less than 1 hour | 50 | 61 |
| 1 - < 2 hours | 28 | 24 |
| 2 - < 3 hours | 14 | 13 |
| 3 - < 4 hours | 6 | 1 |
| 4 or more hours | 3 | 1 |



No data available for Riverside from 2002 – 2006

Supporting the above finding, median round trip commute time among Riverside County residents has dramatically increased while the figure for San Bernardino County has slightly decreased.

Table 50. Median Round Trip Commute Time

| Year of Survey | Riverside County | San Bernardino County |
|----------------------------|-----------------------|--------------------------|
| 1997 Annual Survey | 39.8 min | * |
| 1998 Annual Survey | 38.6 min | 38.2 min |
| 1999 Annual Survey | 35.7 min | 37.3 min |
| 2000 Annual Survey | 39.3 min | 37.1 min |
| 2001 Annual Survey | 36.3 min | 38.5 min |
| 2002 – 2006: No comparativ | ve data are available | , |
| 2007 / 08 Annual Survey | 39.2 min | 40.2 min |
| 2008 / 09 Annual Survey | 44.1 min | 40.0 min |
| 2010 Annual Survey | 50.3 min | 39.1 min |

^{*} No data available

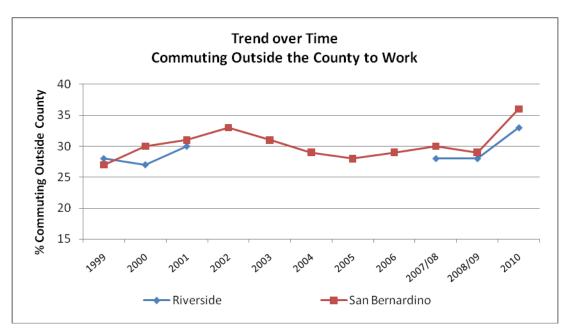
Further, the reason for the increased commute time in Riverside County is to be found in the fact that over the past year, significantly more Riverside County residents are traveling outside of their county to work (28% last year vs. 33% this year). The percentage of San Bernardino County residents traveling outside the county for work has also increased (from 29%).

last year to 36% this year), however many of those commuters live near the county line and therefore their commute out of the county has not significantly increased median commute time.

Table 51. Commuting Destinations (County)

| | | Work Destination (County) | | | | | |
|--|-----------|---------------------------|-------------------|--------|----------------|--------------|-------|
| | | Riverside | San Bernardino | Orange | Los Angeles | San Diego | Other |
| D' 1 . | 1999 | 72 | 9 | 7 | 5 | 3 | 4 |
| Riverside | 2000 | 72 | 9 | 7 | 5 | 4 | 2 |
| County | 2001 | 70 | 10 | 10 | 5 | 3 | 2 |
| Respondent Commuting | 2007 / 08 | 72 | 8 | 7 | 5 | 3 | 5 |
| Destinations* | 2008 / 09 | 72 | 11 | 10 | 3 | 1 | 3 |
| Destinations | 2010 | 67 | 10 | 9 | 7 | 5 | 2 |
| San | 1999 | 6 | 73 | 3 | 15 | <1 | 3 |
| Bernardino County Respondent Commuting | 2000 | 7 | 70 | 4 | 15 | <1 | 3 |
| | 2001 | 8 | 69 | 4 | 16 | <1 | 2 |
| | 2007 / 08 | 7 | 70 | 4 | 15 | <1 | 4 |
| | 2008 / 09 | 6 | 71 | 3 | 16 | <1 | 3 |
| Destinations* | 2010 | 6 | 64 | 6 | 20 | <1 | 3 |

^{*}Numbers in cells are % of employed respondents.



^{*} No data available for Riverside from 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.

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. It is interesting to note, however, that while significantly more San Bernardino County residents said crime and gang activity is the number one negative factor of living in their county as compared to Riverside County residents, when asked specifically "How fearful are you that you will be the victim of a serious crime, such as a violent or costly crime?" (Question 9), residents in San Bernardino County are only slightly more fearful than Riverside County residents (31% in Riverside County and 36% in San Bernardino County report being "very" or "somewhat" fearful) – Table 52.

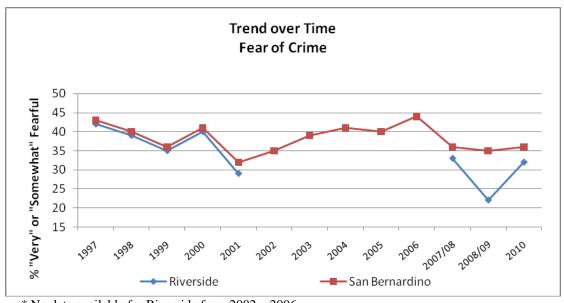
Table 52. Fear of Being The Victim of a Serious Crime (Such as a Violent or Costly Crime)

| | Riverside County % | SB County % |
|--------------------|--------------------------|-------------------|
| Very fearful | 6 | 9 |
| Somewhat fearful | 25 | 27 |
| Not too fearful | 37 | 42 |
| Not at all fearful | 31 | 22 |

Last year we noted that fear of being the victim of a serious crime had declined among Riverside County residents. However, this year that fear is up again and is now not much lower than fear among San Bernardino County residents.

Table 53. % 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 |
| 2010 Annual Survey | 31 | 36 |



^{*} No data available for Riverside from 2002 - 2006

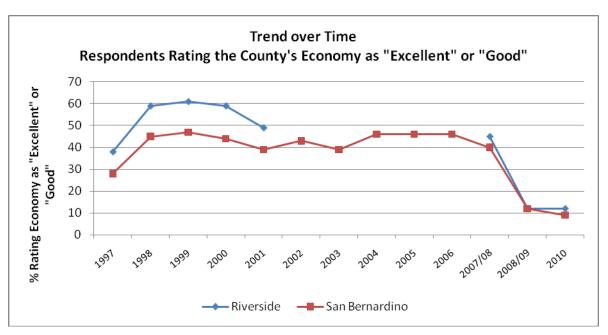
ECONOMIC EVALUATIONS AND FUTURE PROSPECTS

OVERVIEW: Respondents in both counties continue to feel the effects of the current recession. Ratings of their county's economy continue to be low this year in both counties, as is the number of residents who say they are better off financially this year as compared to last year. In addition, residents in both counties are not very optimistic regarding their financial well-being in the coming year.

As mentioned in the previous chapters, there was a dramatic decline last year in the number of residents in both counties who rated the economy as "excellent" or "good." Those numbers are down in both counties again this year, with residents in San Bernardino County rating it only slightly lower than those in Riverside County.

Table 54. % 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 |
| 2010 Annual Survey | 12 | 9 |



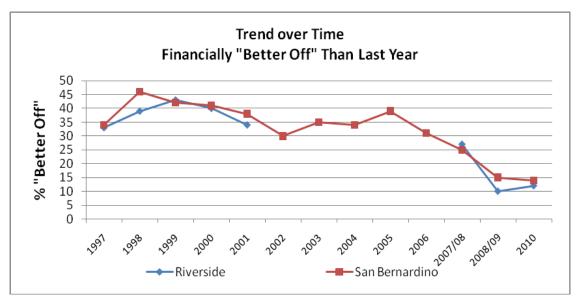
No data available for Riverside from 2002 – 2006

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). Residents of both

counties are clearly still reeling from the recession, as evidenced by the dramatic decline in number of people feeling "better off" financially both last year and this year.

Table 55. % 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 / 08 Annual Survey | 27 | 25 | | |
| 2008 / 09 Annual Survey | 10 | 15 | | |
| 2010 Annual Survey | 12 | 14 | | |



No data available for Riverside from 2002 – 2006

In addition, 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), Riverside and San Bernardino County respondents were roughly equally optimistic about their future financial condition.

Table 56. 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 | 41 | 42 |
| Same | 41 | 44 |
| Worse off | 19 | 14 |

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, and the lowest marks to street/road maintenance. For the most part, Riverside County respondents rate the services higher than their San Bernardino County counterparts.

Over the years, there has been remarkable stability in rank order of satisfaction with selected private and public services. Among both Riverside County and San Bernardino County residents, the highest ratings are given to Police/Sheriff and the lowest ratings to the way streets and roads are maintained. On the other hand, the degree of satisfaction is significantly different between counties, with Riverside County respondents giving significantly higher ratings to virtually all services. The following table (Table 57) details the percentage of respondents who indicate that the services are "excellent" or "good" (Questions 14 to 20).

Table 57. % Rating Service as "Excellent" or "Good"

| | Riverside County | SB County |
|-------------------------|---------------------|--------------|
| SERVICE | % | % |
| Police/Sheriff | 71 | 68 |
| Shopping | 68 | 64 |
| Parks/Recreation | 64 | 60 |
| Public Schools | 52 | 43 |
| Entertainment | 52 | 48 |
| Transportation | 40 | 40 |
| Street/Road Maintenance | 39 | 32 |

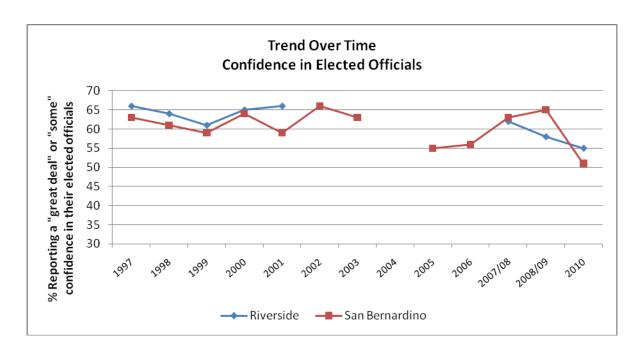
CONFIDENCE IN ELECTED OFFICIALS

OVERVIEW: Confidence in elected officials is at an all time low in both counties, particularly in San Bernardino County.

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 little difference in ratings between counties. This year confidence is at an all time low in both counties, but the erosion in confidence was especially severe in San Bernardino County (from 65% last year to 51% this year). The precipitous decline in San Bernardino County is not especially surprising given recent media coverage of alleged corruption on the part of a few high profile public officials.

Table 58. % Reporting "A Great Deal" or "Some" Confidence In Their Elected Officials.

| Year of Survey | Riverside | SB | | |
|--|-----------|--------|--|--|
| | County | 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 / 08 Annual Survey | 62 | 63 | | |
| 2008 / 09 Annual Survey | 58 | 65 | | |
| 2010 Annual Survey | 55 | 51 | | |



No data available for Riverside from 2002 - 2006

FINAL NOTE

In this report we have presented San Bernardino region-specific findings from the 2010 Inland Empire Annual Survey. The reader is encouraged to review the full data displays (attached) for the complete listing of survey results. This report will be added to previous Annual Surveys on our website (http://iar.csusb.edu) for those who wish to engage in more detailed comparative analysis with previous years' reports.

For questions about the Inland Empire Annual Survey (or additional analysis tailored to a particular organization or agency), please contact the authors: Shel Bockman (909-537-5733), Barbara Sirotnik (909-537-5729), or Christen Ruiz (909-537-5776).

Appendix I

Questionnaire

INLAND EMPIRE ANNUAL SURVEY, 2010

- SHELLO Hello, I am calling from the Institute of Applied Research at Cal State San Bernardino. We're conducting a scientific study of quality of life issues in the Inland Empire and we need the input of the head of the household or his or her partner. Have I reached [READ PHONE # FROM SCREEN]?
 - 1. CONTINUE
 - 2. DISPOSITION SCREEN

SHELLO2 (used only to complete a survey already started)

Have I reached [READ PHONE NUMBER]? Hello, this is _______, calling from the Institute of Applied Research at CSU San Bernardino. Recently, we started an interview with the [MALE/FEMALE] head of the household and I'm calling back to complete that interview. Is that person available?

SPAN INTERVIEWER: PLEASE CODE WHICH LANGUAGE THE INTERVIEW WILL BE CONDUCTED IN:

- 1. ENGLISH
- 2. SPANISH

SHEAD Are you that person?

- Yes [SKIP TO INTRO]
 No [CONTINUE]
- 8. DON'T KNOW/NO RESPONSE
- 9. REFUSED

SHEAD2 Is the head of the household or his or her partner at home?

- 1. Yes [SKIP TO INTRO]
- 2. No [CONTINUE]
- 3. DON'T KNOW/NO RESPONSE
- 4. REFUSED

CALLBK Is there a better time I could call back to reach the head of the household?

- 1. Yes [SKIP TO APPT]
- 2. No [ENDQUEST]

INTRO This survey takes about 10 minutes to complete, and your answers may be used by county officials to make policy decisions. Your identity and your responses will remain completely confidential, and of course, you are free to decline to answer any particular survey question.

I should also mention that this call may be monitored by my supervisor for quality control purposes only. Is it alright to ask you these questions now?

- 1. Yes [CONTINUE]
- 2. No [SKIP TO APPT]

- AGEQAL First, I'd like to verify that you are at least 18 years of age.
 - 1. Yes [SKIP TO BEGIN]
 - 2. No
- QSORRY I'm sorry, but currently we are interviewing people 18 years of age and older.

Thank you for your time. [ENDQUEST]

APPT Is it possible to make an appointment to ask you the survey questions at a more

convenient time?

- 1. Yes (SPECIFY)
- 2. No [ENDQUEST]

BEGIN I'd like to begin by asking you some general questions.

[INTERVIEWERS: PRESS ANY KEY TO CONTINUE]

COUNTY First, what county do you live in?

- 1. Riverside County [SKIPTO B1a]
- 2. San Bernardino County [SKIPTO B1b]
- 3. Other county [QSORRY2]

QSORRY2 I'm sorry, but we are only surveying people from Riverside or San Bernardino county at this time. Thank you for your cooperation. YES we have sheet at desk.

B1a. What city do you live in? [ASKED ONLY OF RIVERSIDE COUNTY RESIDENTS]

1. AGUANGA 16. INDIAN WELLS 31. PERRIS 2. ANZA 17. INDIO 32. RANCHO MIRAGE 3. BANNING 18. LA QUINTA 33. RIVERSIDE 4. BEAUMONT 19. LAKE ELSINORE 34. SAN JACINTO 5. BLYTHE 20. MARCH AIR RES. 35. SUN CITY 6. CABAZON

6. CABAZON 21. MECCA 36. TEMECULA 7. CALIMESA 22. MENIFEE 37. THERMAL

8. CATHEDRAL CITY 23. MIRA LOMA 38. THOUSAND PALMS 9. COACHELLA 24. MORENO VALLEY 39. WHITE WATER

9. COACHELLA 24. MORENO VALLEY 39. WHITE WATER 10. CORONA 25. MOUNTAIN CENTER 40. WILDOMAR 11. DESERT CENTER 26. MURRIETA 41. WINCHESTER

12. DESERT CENTER 20. MORRIETA 41. WINCHESTER 12. DESERT HOT SPR. 27. NORCO 98. DON'T KNOW 13. HEMET 28. NUEVO 99. REFUSED

14. HOMELAND 29. PALM DESERT 15. IDYLLWILD 30. PALM SPRINGS

- B1b. What city do you live in? [ASKED ONLY OF SAN BERN. COUNTY RESIDENTS]
 - 1. ADELANTO 19. LAKE ARROWHEAD
 - 2. APPLE VALLEY 20. LANDERS
 - 38. UPLAND 39. VICTORVILLE 3. BARSTOW 21. LOMA LINDA
 - 22. LUCERNE VALLEY 4. BIG BEAR 40. WRIGHTWOOD
 - 5. BIG RIVER 23. LYTLE CREEK 41. YERMO 6. BLOOMINGTON 24. MENTONE 42. YUCAIPA
 - 7. CEDAR GLEN 25. MONTCLAIR 43. YUCCA VALLEY
 - 8. CHINO 26. MORONGO VALLEY 98. DON'T KNOW
 - 9. CHINO HILLS 27. NEEDLES 10. COLTON 28. ONTARIO
 - 11. CRESTLINE 29. PHELAN
 - **12. EARP** 30. RANCHO CUCAMONGA
 - 13. FONTANA 31. REDLANDS 14. GRAND TERRACE 32. RIALTO
 - 33. RUNNING SPRINGS 15. HESPERIA 16. HIGHLAND 34. SAN BERNARDINO
 - 17. HINCKLEY 35. TRONA
 - 18. JOSHUA TREE 36. TWENTYNINE PALMS/ AMBOY
- B2. What is your zip code?

ZIP CODE:

99998. DON'T KNOW 99999. REFUSED

- B3. Overall, how would you rate [INSERT COUNTY] County as a place to live? Would you say it is very good, fairly good, neither good nor bad, fairly bad, or very bad?
 - **VERY GOOD** 1.
 - 2. FAIRLY GOOD
 - 3. **NEITHER GOOD NOR BAD**
 - 4. FAIRLY BAD
 - 5. **VERY BAD**
 - DON'T KNOW 8.
 - 9. REFUSED

ROTATE THE FOLLOWING TWO QUESTIONS (B4 and B5)

- In your opinion, what is the ONE best thing about living in [INSERT COUNTY] County? B4. [INTERVIEWER: DON'T READ OPTIONS]
 - 1. GOOD AREA, LOCATION, SCENERY
 - 2. AFFORDABLE HOUSING
 - 3. GOOD CLIMATE, WEATHER
 - 4. NOT CROWDED
 - 5. GOOD SCHOOLS/UNIVERSITIES
 - 6. LESS CRIME, FEEL SAFE
 - 7. JOB AVAILABILITY
 - FRIENDLY PEOPLE 8.
 - 9. Family and Friends live here

37. TWIN PEAKS

99. REFUSED

- 10. Close to work
- 11. Family atmosphere nice neighborhood
- 12. OTHER (SPECIFY)_____
- 13. NOTHING
- 98. DON'T KNOW
- 99. REFUSED
- B5. In your opinion, what would you say is the ONE most negative thing about living in [INSERT COUNTY] County? [INTERVIEWER: DON'T READ OPTIONS]
 - 1. SMOG, AIR POLLUTION
 - 2. TRAFFIC
 - 3. POOR PUBLIC TRANSPORTATION
 - 4. DRUGS
 - 5. CRIME/GANG ACTIVITY
 - 6. BAD LOCATION
 - 7. LACK OF ENTERTAINMENT
 - 8. OVERPOPULATED
 - 9. BAD SCHOOL SYSTEM
 - 10. COST OF LIVING
 - 11. LACK OF JOB OPPORTUNITY
 - 12. WEATHER, FIRES, FLOODS
 - 13. OTHER (SPECIFY)_____
 - 14. NOTHING
 - 98. DON'T KNOW
 - 99. REFUSED
- B6. In comparison to a year ago, would you say that you and your family are financially better off, about the same, or worse off?
 - 1. BETTER OFF
 - 2. SAME
 - 3. WORSE OFF
 - 8. DON'T KNOW
 - 9. REFUSED
- B7. Now looking ahead, do you think that a year from now you and your family will be better off, about the same, or worse off than you are now?
 - 1. BETTER OFF
 - 2. SAME
 - 3. WORSE OFF
 - 8. DON'T KNOW
 - 9. REFUSED
- B8. In general, how would you rate the economy in [INSERT COUNTY] County today? Would you say that it is Excellent, Good, Fair, or Poor?
 - 1. EXCELLENT
 - 2. GOOD
 - 3. FAIR
 - 4. POOR

- 8. DON'T KNOW
- 9. REFUSED
- B9. In general, how fearful are you that you will be the victim of a serious crime, such as a violent or costly crime? Would you say that you are...
 - 1. Very fearful
 - 2. Somewhat fearful
 - 3. Not too fearful, or . . .
 - 4. Not at all fearful
 - 8. DON'T KNOW
 - 9. REFUSED

TRANS Now, I'd like to ask you some questions about voting.

- B10. Are you currently registered to vote?
 - 1. YES
 - 2. NO
 - 8. DON'T KNOW
 - 9. REFUSED
- B11. Which of the following best describes your political party affiliation? ...
 - 1. Democrat
 - 2. Republican
 - 3. Independent
 - 4. Some other Party
 - 5. NONE
 - 8. DON'T KNOW
 - 9. REFUSED TO ANSWER
- B12. Would you say that you vote ...
 - 1. In all elections
 - 2. Only in some
 - 3. Hardly ever, or
 - 4. Never
 - 8. DON'T KNOW
 - 9. REFUSED
- B13. Politically, do you consider yourself to be..... [INTERVIEWER: READ OPTIONS]
 - 1. Very liberal
 - 2. Somewhat liberal
 - 3. Middle of the road
 - 4. Somewhat conservative, or
 - 5. Very conservative
 - 8. DON'T KNOW
 - 9. REFUSED

TRANS Now, I'd like to ask you how you rate the following local, public and private services. For each please let me know if you believe the service is excellent, good, fair, or poor.

(**ROTATE B14 – B20**)

- B14. Police/Sheriff
- B15. Parks and Recreation
- B16. Maintenance of local streets and roads
- B17. Public schools
- B18. Shopping
- B19. Transportation
- B20. Entertainment
- 1. EXCELLENT
- 2. GOOD
- 3. FAIR
- 4. POOR
- 8. DON'T KNOW
- 9. REFUSED

TRANSE Now I have some questions about your employment status.

- B21. Are you currently employed?
 - 1. YES [SKIP TO **B23**]
 - 2. NO [CONTINUE]
 - 9. REFUSED [SKIPTO B28]
- B22. Are you retired, looking for work, a housewife/husband and not looking for work outside the home, or not currently in the workforce?
 - 1. RETIRED [SKIPTO B28]
 - 2. LOOKING FOR WORK
 - 3. A HOUSEWIFE/HOUSEHUSBAND AND NOT LOOKING FOR WORK OUTSIDE THE HOME; OR [SKIPTO B28]
 - 4. NOT CURRENTLY IN WORKFORCE [SKIPTO B28]
 - 9. REFUSED [SKIPTO B28]

RIVERSIDE RESPONDENTS ONLY - IF A PERSON SAYS HE/SHE IS LOOKING FOR WORK, ASK:

B22a. What type of jobs are you seeking? [OPEN ENDED]

ALL UNEMPLOYED RESPONDENTS SKIP TO QUESTION Q28

- B23. Do you work full time or part time?
 - 1. FULL TIME
 - 2. PART TIME
 - 9. REFUSED

| B24. | What is your occupation? | |
|------|--------------------------|--|
| | | |

B25. When thinking about your travel to and from work, on the average, how much total time, IN MINUTES, do you spend commuting ROUND TRIP each day?

[INTERVIEWER: CODE # MINUTES]

- 777. DOESN'T APPLY; DON'T WORK OUTSIDE HOME
- 888. DON'T KNOW
- 999. REFUSED
- B26. How many MILES roundtrip do you travel to work each day? [INTERVIEWER: EMPHASIZE "MILES" SO THEY KNOW THIS IS A DIFFERENT QUESTION THAN #25]

Total Miles

888. DON'T KNOW

999. REFUSED

- B27. What county do you work in?
 - 1. RIVERSIDE
 - 2. SAN BERNARDINO
 - 3. ORANGE
 - 4. LOS ANGELES
 - 5. SAN DIEGO
 - 6. OTHER (SPECIFY)____
 - 8. DON'T KNOW
 - 9. REFUSED
- B28. How much confidence do you have that the elected officials in your city or community will adopt policies that will benefit the general community? Would you say you have a "great deal", "some", "not much," or "no confidence
 - A GREAT DEAL OF CONFIDENCE
 - 2. SOME CONFIDENCE
 - 3. NOT MUCH CONFIDENCE
 - 4. NO CONFIDENCE
 - 8. DON'T KNOW
 - 9. REFUSED

SANBAG QUESTIONS – ASKED IN SAN BERNARDINO COUNTY ONLY

- SANBAG1 What do you think is the most critical environmental issue facing the Inland Empire today? [code, don't read -- one answer only]
 - 1. Air pollution, vehicle emissions
 - 2. Water supply, drought
 - 3. Energy, oil drilling
 - 4. Global warming, global climate change, greenhouse gases
 - 5. Water pollution
 - 6. Landfill, garbage
 - 7. Loss of forests, forest fires, wildfires
 - 8. Pollution in general
 - 9. Other (specify)
 - 98. DON'T KNOW
 - 99. REFUSED

- SANBAG2 Most scientists define greenhouse gases as those gases that may lead to climate change. Car emissions and industry are major sources of these gases. How concerned are you about greenhouse gas and global warming? Would you say that you are very concerned, somewhat concerned, or not at all concerned?
 - 1. Very concerned
 - 2. Somewhat concerned, or
 - 3. Not at all concerned
 - 8. DON'T KNOW
 - 9. REFUSED
- SANBAG3 How long do you think it will take before the effects of global warming will begin to happen? Do you think they have already begun to happen, or they will start happening within a few years, or within your lifetime, or only in future generations, or do you think they will never happen?
 - 1. Already begun to happen
 - 2. Within a few years
 - 3. Within your lifetime
 - 4. Not within your lifetime, or only in future generations
 - 5. Will never happen
 - 8. DON'T KNOW
 - 9. REFUSED
- SANBAG4 In the past year how often have you used transit bus, commuter train, ridesharing, walking or a bicycle instead of driving your car alone? Would you say never, once this past year, a few times a year, at least once a month, or at least once a week?
 - 1. Never
 - 2. Once this past year
 - 3. A few times a year
 - 4. At least once a month
 - 5. At least once a week
 - 6. Don't drive/don't have a car
 - 7. Daily
 - 8. DON'T KNOW
 - 9. REFUSED
- SANBAG5 Would you be willing to see tougher air pollution standards on new passenger cars, light trucks, and SUV's?
 - 1. YES [CONTINUE TO SANBAG 6]
 - 2. NO [SKIPTO SANBAG7]
 - 3. MAYBE [SKIPTO SANBAG 6]
 - 8. DON'T KNOW [SKIPTO SANBAG7]
 - 9. REFUSED [SKIPTO SANBAG7]

| SANBAG6 | [IF YES OR MAYBE TO #5]Would this be true even if it made it more costly |
|---------------|--|
| | u to purchase or lease your next vehicle? |
| 1. Y E | ± • • • • • • • • • • • • • • • • • • • |
| 2. PO | SSIBLY – DEPENDS ON THE COST |
| 3. NO | |
| 8. DO | N'T KNOW |
| 9. RE | FUSED |
| SANBAG7 | I'd like to get an idea of the type of housing you live in. Do you live in an |
| | nent, condo, or single-family home? [DO NOT READ LIST] |
| 1. | APARTMENT |
| 2. | CONDO |
| 3. | SINGLE-FAMILY HOME |
| 4. | TOWNHOUSE/TOWNHOME (THEY OWN THE LAND) |
| 5. | MOBILE HOME |
| 6. | OTHER (SPECIFY) |
| 8. | DON'T KNOW |
| 9. | REFUSED |
| SANBAG8 | Do you live in a densely populated neighborhood centrally located to be within |
| | ng distance of dining, shopping and schools, or in an area where you depend on a |
| | e to get to shopping or schools? |
| 1. | Densely populated neighborhood centrally located |
| 2. | You depend on a vehicle to get to shopping or schools |
| 3. | Other (specify) |
| 8. | NOT SURE/DON'T KNOW |
| 9. | REFUSED |
| SANRAGO | Now think ahead about 10 years. What type of housing do you think you will |
| | to live in? An apartment, condo, or single-family home? (DO NOT READ LIST) |
| 1. | APARTMENT |
| 2. | CONDO |
| 3. | SINGLE-FAMILY HOME |
| 4. | TOWNHOUSE/TOWNHOME (THEY OWN THE LAND) |
| 5. | MOBILE HOME |
| 6. | OTHER (specify) |
| 8. | DON'T KNOW |
| 9. | REFUSED |

- SANBAG10 And in 10 years will you want to live in a densely populated neighborhood centrally located to be within walking distance of dining and shopping and schools, or in an area where you depend on a vehicle to get to shopping or schools?
 - 1. Densely populated neighborhood centrally located
 - 2. Where you depend on a vehicle to get to shopping or schools
 - 3. Other (specify)_

- 8. DON'T KNOW
- 9. REFUSED

<u>OMNITRANS QUESTIONS – ASKED IN CERTAIN SAN BERNARDINO COUNTY ZIP</u> <u>CODES ONLY</u>

TRANSOMN INTERVIEWER: PRESS ANY KEY TO CONTINUE

| OMNI1. | What is the n | ame of your | local bus | service | provider? |
|--------|---------------|-------------|-----------|---------|-----------|
|--------|---------------|-------------|-----------|---------|-----------|

[INTERVIEWER: DON'T READ]

1. OMNITRANS (OR OMNI) [SKIPTO QUESTION OMNI3]

- 2. OMNILINK
- 3. (REDLANDS) TROLLEY
- 4. ACCESS
- 5. MTA/RTD
- 6. FOOTHILL
- 7. MARTA
- 8. VVTA
- 9. OCTA
- 10. OTHER (SPECIFY) _____
- 98. DON'T KNOW
- 99. REFUSED

OMNI2. Have you heard of Omnitrans?

- 1. YES
- 2. NO [SKIPTO FOS1]
- 8. DON'T KNOW [SKIPTO FOS1]
- 9. REFUSED [SKIPTO FOS1]

IF THEY SAID "NO", "DON'T KNOW" OR "REFUSED" TO QUESTION OMNI2, SKIP OUT OF OMNITRANS QUESTIONS.

OMNI3. On a scale of 1 to 7 with 1 meaning very poor and 7 meaning excellent, how would you rate your overall perception of Omnitrans/your local bus service, even if you have never used it personally? [NOTE: SAY "OMNITRANS" IF THEY HAVE HEARD OF IT (QUESTION OMNI2) or "YOUR LOCAL BUS SERVICE" IF THEY ANSWERED NO, DON'T KNOW, OR REFUSED TO QUESTION OMNI2]

Very poor Excellent

1 2 3 4 5 6 7

- 8. DON'T KNOW
- 9. REFUSED

OMNI4. Have you seen or heard an advertisement for Omnitrans in the last 6 months?

- 1. YES
- 2. NO [SKIPTO Curt1]
- 8. DON'T KNOW [SKIPTO curt1
- 9. REFUSED [SKIPTO curt1

OMNI5. Where was that? [INTERVIEWER: DON'T READ OPTIONS....CHECK ALL THAT ARE MENTIONED BY RESOPNDENT]

- 1. TV
- 2. RADIO
- 3. NEWSPAPER
- 4. DIRECT MAIL
- 5. BILLBOARD
- 6. AD ON OUTSIDE OF BUS
- 7. BUS SHELTER
- 8. OTHER (SPECIFY)
- 98. DON'T KNOW
- 99. REFUSED

<u>PATHOLOGY ARTS QUESTIONS – ASK IN BOTH COUNTIES, ONLY OF PEOPLE WHO WORK IN ORANGE AND LA COUNTY</u>

CURT1 How do you usually get to work each day? If you use more than one way to get to work identify the mode you use most often during your typical work week.

[INTERVIEWER: DON'T READ – IF THEY LIST MULTIPLE MODES THEN ASK ABOUT THE ONE MODE THEY USE FOR THE LONGEST PART OF THE TRIP]

| 1. | DRIVE ALONE | INCLUDES MOTORCYCLES |) [SKIPTO CURT6] | |
|----|-------------|----------------------|------------------|--|
|----|-------------|----------------------|------------------|--|

- 2. CAR VANPOOL [SKIPTO CURT6]
- 3. PUBLIC BUS [SKIPTO CURT6]
- 4. METROLINK OR RAIL
- 5. OTHER (SPECIFY): ______ [SKIPTO CURT6]
- 8. DON'T KNOW [SKIPTO CURT6]
- 9. REFUSED [SKIPTO CURT6]

IF THEY USE METROLINK, ASK CURT 2 TO 5....

CURT2 How far is your place of work from the Metrolink station?

- 1. Less than 1 mile away
- 2. 1 to less than 5 miles
- 3. 5 to less than 10 miles
- 4. More than 10 miles away
- 8. DON'T KNOW
- 9. REFUSED

CURT3 Currently how do you usually get to work from the Metrolink station?

- 1. WALK
- 2. SOMEONE PICKS ME UP AT THE STATION
- 3. BUS/TAXI
- 4. TRAIN
- 5. BICYCLE
- 8. DON'T KNOW
- 9. REFUSED

CURT4

How often do you need to do errands during your lunch or throughout the day that would require the use of a car?

- 1. Every day
- 2. A few times a week
- 3. A few times a month
- 4. Rarely
- 5. Never
- 8. DON'T KNOW
- 9. REFUSED

CURT5 What do you see as the advantages of taking the Metrolink to work? [INTERVIEWER: THIS IS A MULTIPLE RESPONSE QUESTION...RECORD ALL ANSWERS]

- * NONE
- * CHEAPER THAN TAKING MY CAR
- * MORE CONVENIENT
- * DON'T WANT TO HASSLE WITH TRAFFIC
- * DON'T KNOW
- * REFUSED

SKIPTO CURT6

IF THEY DON'T USE METROLINK, ASK....

CURT6

What are your reasons for not using Metrolink? [MULTIPLE RESPONSE]

- * WORK IS TOO FAR AWAY FROM THE STATION
- * NEED MY CAR DURING THE DAY
- * PREFER TO DRIVE
- * COSTS LESS TO CARPOOL
- * COSTS LESS TO DRIVE MY OWN CAR
- * NOT ENOUGH ROUTES TO MEET MY TIME SCHEDULE
- * TAKES TOO LONG WITH METROLINK
- * I DO USE IT, BUT NOT MOST OF THE TIME
- * OTHER (SPECIFY):_____
- * DON'T KNOW
- * REFUSED.

ASK EVERYBODY WHO WORKS IN LA OR ORANGE COUNTY

CURT7

Suppose a small electric car was made available at around \$15 a day that would allow you to drive between the Metrolink station and your workplace, and use throughout the day. If that were the case.....

[IF NOT A METROLINK USER, ASK]: would you be more likely to use the Metrolink?

[IF METROLINK USER, ASK]: would you be interested in using such a car?

- 1. Yes [SKIPTO CURT9]
- 2. Maybe [SKIPTO CURT9]
- 3. No
- 8. DON'T KNOW
- 9. REFUSED

CURT8

[**IF NO to CURT7**] How much *would* you be willing to pay per day for that small car? \$ _____

777. DOESN'T APPLY

888. DON'T KNOW

999. REFUSED

CURT9

Would you be willing to participate in a FREE pilot program that would provide you with an electric vehicle as transportation between the Metrolink station and your work place?

- 1. YES
- 2. NO
- 8. DON'T KNOW
- 9. REFUSED

RIVERSIDE COUNTY ECON. DEV. AGENCY QUESTIONS – ASK ONLY IN RIVERSIDE COUNTY

TRANSEDA: Now I have a few questions of interest to the Riverside County Economic Development Agency and Workforce Development Centers

EDAWC1. 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? Would it be a community college, the internet, a workforce development center, or a private proprietary training school?

- 1. Community College
- 2. Internet
- 3. Workforce development center (one stop career center)
- 4. Private proprietary school
- 5. Other (SPECIFY)_____
- 8. DON'T KNOW
- 9. REFUSED

FALLBACK FOR INTERVIEWER: IF THEY ASK WHAT A "PRIVATE PROPRIETARY SCHOOL" IS, SAY "FOR EXAMPLE, A SCHOOL THAT PROVIDES TRUCK DRIVER TRAINING...")

| | aining thr | fore this survey, did you know that Riverside County provides job information ough workforce development centers, sometimes called one-stop career centers? |
|----------------|------------|---|
| | | Yes |
| | | No |
| | | DON'T KNOW |
| | 9. 1 | REFUSED |
| EDAV | VC3. Ha | ve you or someone you know lost their home in the current housing market? |
| | 1. | Yes |
| | 2. I | No |
| | 9. | REFUSED |
| EDAV you sa | y that you | How concerned are you that you might lose your home in the near future? Would u are very concerned, somewhat concerned, or not at all concerned? Very concerned |
| | | Somewhat concerned |
| | | Not at all concerned |
| | | |
| | | DON'T KNOW |
| | 9.] | REFUSED |
| ASK Z | | RST 2 QUESTIONS ONLY OF COMMUTERS WHO LEAVE THE |
| EDAV | VC5. | You said that your occupation was[FILL IN OCCUPATION] |
| | What in | dustry do you work in? [OPEN ENDED QUESTION] [INTERVIEWER: IF |
| | TEACH | IER OR ADMINISTRATOR IN A SCHOOL, ASK WHAT GRADE LEVEL |
| | AND SI | UBJECT DO THEY TEACH] |
| EDAV | | What is your reason for commuting instead of working in the area? |
| | [INTER | VIEWER: DON'T READ – CHECK ALL THAT APPLY] |
| | 1. | MONEY – EQUIVALENT JOBS IN SAN BERNARDINO DON'T PAY AS S |
| | 7 | WELL |
| | | JOB AVAILABILITY – CAN'T FIND A JOB HERE THAT I WANT |
| | 3. I | HOUSING – CAN'T FIND AN AFFORDABLE HOME WHERE I WORK |
| | | OTHER (specify) |
| | | DON'T KNOW |
| | 6. I | REFUSED |
| COM | NATINITAN | |
| | | Y FOUNDATION QUESTIONS approximately how much money did you donate to charities and non-profits, not |
| rosi | | approximately now indent money did you donate to charities and non-profits, not ag religious organizations like a church, temple, or mosque? \$ |
| | | |
| | | EY SAY 0 SKIPTO FOS3 |
| | | . DON'T KNOW . REFUSED |
| INIOMIC | | |
| INSTIT | UIEUFAP | PPLIED RESEARCH 14 2010 Inland Empire Annual Survey |

FOS2 About what percent of that was donated to organizations in the Inland Empire? _____ % 998. DON'T KNOW 999. REFUSED

FOS3 How do you decide what organizations should receive your financial support? [INTERVIEWER: CHECK ALL THAT APPLY. IF THEY DON'T UNDERSTAND THE QUESTION, SAY: For example, do you only give to organizations you have had a personal involvement in, or do you respond to mail solicitations, or give if a friend asks you to support an organization?]

- 1. I DON'T GIVE TO ORGANIZATIONS
- 2. PERSONAL INVOLVEMENT (EXAMPLES: ON THE BOARD, ALUMNI, OR MEMBER OF A GROUP)
- 3. CAUSES CLOSE TO MY HEART
- 4. RESPOND TO MAIL SOLICITATIONS
- 5. RESPOND TO MEDIA (TV/RADIO/NEWSPAPER) AD OR ARTICLE
- 6. A FRIEND ASKS ME TO SUPPORT
- 7. OTHER (SPECIFY)_____
- 8. DON'T KNOW
- 9. REFUSED

[DEMOG]

DEMOG And finally I'd like to ask a few questions about you and your background...

- D1. What was the last grade of school that you completed?
 - 1. SOME HIGH SCHOOL OR LESS
 - 2. HIGH SCHOOL GRADUATE
 - 3. SOME COLLEGE
 - 4. COLLEGE GRADUATE (BACHELOR'S DEGREE)
 - 5. SOME GRADUATE WORK
 - 6. POST-GRADUATE DEGREE
 - 8. DON'T KNOW
 - 9. REFUSED
- D2. Which of the following best describes your marital status?...
 - 1. Single, never married
 - 2. Married
 - 3. Divorced
 - 4. Widowed
 - 5. Separated
 - 6. Single, living with partner
 - 7. Other (Specify)
 - 9. REFUSED

D2b. How many children ages 18 years old or younger do you have living at home? **REFUSED [ENTER 999]** IF 0, SKIPTO TO D3 CSUSB CHILDREN CENTER QUESTIONS – SAN BERNARDINO COUNTY ONLY Ask only if they have children under 18: How many of these children are under the age of 13? BOB1 IF 0, SKIPTO D3 Ask only if they have children under 13: Cal State San Bernardino has a children's center on campus. How interested are BOB2 you in using the Children's Center on CSUSB's campus for child care? 1. Very Interested [SKIPTO D3] 2. Somewhat Interested [SKIPTO D3] [CONTINUE TO BOB3] 3. Not Very Interested Not at all Interested [CONTINUE TO BOB3] 4. 8. DON'T KNOW 9. **REFUSED** BOB3 What are the reasons for your disinterest in on-campus child care? [SELECT ALL THAT APPLY] I would be interested, but waiting list is too long 1. 2. Too expensive Other child care is more convenient (location) 3. Satisfied with other child care arrangements 4. Family or spouse watches the kids 5. 6. I was unaware there was on-campus child care Hours at the child care center are inconvenient 7. 8. Other _____(8 did not work on 2/9/10 but is fixed on 2/10/10) 9. DON'T KNOW 10. **REFUSED** Are you of Hispanic or Latino origin? YES 1. 2. NO 8. DON'T KNOW 9. **REFUSED** D4. How would you describe your race or ethnicity? **SELECT ALL THAT APPLY** ASIAN (SPECIFY) 1. 2. BLACK OR AFRICAN AMERICAN

HISPANIC

CAUCASIAN OR WHITE

OTHER (SPECIFY)

3.

4.

5.

- 8. DON'T KNOW
- 9. REFUSED
- D5. How many cars do you have for your household?

DON'T KNOW [ENTER 998]

REFUSED [ENTER 999]

D6. What was your age at your last birthday?

DON'T KNOW [ENTER 998] REFUSED [ENTER 999]

D7. How long have you lived in [INSERT COUNTY] County? (In years, ROUND UP) DON'T KNOW [ENTER 998]

REFUSED [ENTER 999]

DSB1 Do you see yourself retiring within the next 10 years?

- 1. YES
- 2. NO
- 3. MAYBE
- 4. ALREADY RETIRED [SKIPTO D8]
- 8. DON'T KNOW
- 9. REFUSED

DSB2 Has the recent recession changed your plans for when you will retire?

- 1. YES TOOK EARLY RETIREMENT BECAUSE OF RECESSION
- 2. YES I NEED TO KEEP WORKING LONGER
- 3. MAYBE
- 4. NO
- 5. OTHER (SPECIFY-___)
- 6. NO HAVE NOT THOUGHT ABOUT RETIREMENT YET 2/10/10 ADDED
- 8. DON'T KNOW
- 9. REFUSED
- D8. Which of the following categories best describes your total household or family income before taxes, from all sources, for 2009? Let me know when I get to the correct category.
 - 1. Less than \$25,000
 - 2. \$25,000 to less than \$35,000
 - 3. \$35,000 to less than \$50,000
 - 4. \$50,000 to less than \$65,000
 - 5. \$65,000 to less than \$80,000
 - 6. \$80,000 to \$110,000
 - 7. Over \$110,000
 - 8. DON'T KNOW
 - 9. REFUSED

END:

INTERVIEWER QUESTIONS

GENDER The respondent was...

- 1. Male
- 2. Female
- 3. Couldn't tell

COOP How cooperative was the respondent?

- 1. Cooperative
- 2. Uncooperative
- 3. Very Uncooperative

UNDSTD How well did the respondent understand the questions?

- 1. Very easily
- 2. Easily
- 3. Some difficulty
- 4. Great deal of difficulty

LNG In what language was the interview conducted?

- 1. English
- 2. Spanish

NAME Interviewer name?