

CITY OF MORGAN HILL, CA

INSIGHT

MARKET ANALYTICS

HdL  ECON Solutions

**Submitted by:**

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### Employment Profile

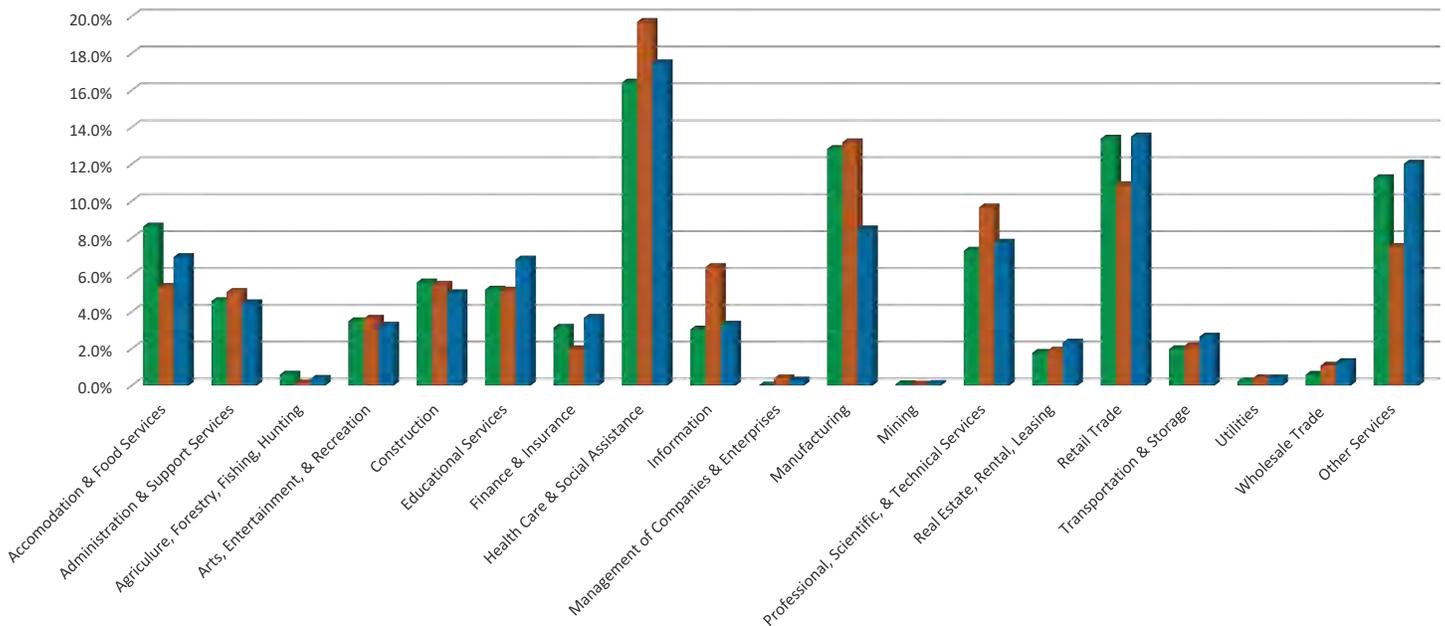
Site: City of Morgan Hill

Date Report Created: 3/31/2020

	Morgan Hill		Santa Clara		California	
Daytime Population	42,418		2,357,200		43,326,738	
Student Population	8,640		578,804		11,597,854	
Median Employee Salary	64,339		71,037		50,107	
Average Employee Salary	74,003		80,439		59,305	
<b>Wages</b>	#		#		#	
<b>Salary/Wage per Employee per Annum</b>						
Under \$15,000 CrYr	139	0.7%	4,048	0.4%	477,531	2.8%
15,000 to 30,000 CrYr	88	0.5%	4,461	0.4%	1,039,263	6.2%
30,000 to 45,000 CrYr	1,255	6.7%	43,309	3.8%	5,760,160	34.1%
45,000 to 60,000 CrYr	4,570	24.5%	158,548	13.8%	3,093,665	18.3%
60,000 to 75,000 CrYr	5,357	28.8%	373,693	32.6%	2,148,458	12.7%
75,000 to 90,000 CrYr	4,517	24.2%	358,292	31.2%	1,786,422	10.6%
90,000 to 100,000 CrYr	472	2.5%	52,733	4.6%	405,361	2.4%
Over 100,000 CrYr	2,230	12.0%	152,153	13.3%	2,174,875	12.9%

### Industry Groups

Employee's by Industry



	Establishments		Employee's		Establishments		Employee's		Establishments		Employee's	
	#	%	#	%	#	%	#	%	#	%	#	%
<b>Total</b>	<b>1,287</b>	<b>100%</b>	<b>18,627</b>	<b>100%</b>	<b>53,687</b>	<b>100%</b>	<b>1,147,237</b>	<b>100%</b>	<b>1,020,841</b>	<b>100%</b>	<b>16,885,735</b>	<b>100%</b>
Accommodation & Food Services	91	7.1%	1,606	8.6%	3,012	5.6%	61,285	5.3%	59,380	5.8%	1,176,116	7.0%
Administration & Support Services	37	2.9%	853	4.6%	1,905	3.5%	58,149	5.1%	33,300	3.3%	753,032	4.5%
Agriculture, Forestry, Fishing, Hunting	10	0.8%	109	0.6%	130	0.2%	1,338	0.1%	5,509	0.5%	60,404	0.4%
Arts, Entertainment, & Recreation	30	2.3%	649	3.5%	1,270	2.4%	41,539	3.6%	24,255	2.4%	547,876	3.2%
Construction	80	6.2%	1,041	5.6%	2,875	5.4%	62,639	5.5%	56,868	5.6%	845,097	5.0%
Educational Services	36	2.8%	968	5.2%	1,500	2.8%	59,016	5.1%	25,643	2.5%	1,153,314	6.8%
Finance & Insurance	89	6.9%	584	3.1%	2,684	5.0%	22,565	2.0%	55,183	5.4%	619,615	3.7%
Health Care & Social Assistance	208	16.2%	3,059	16.4%	9,836	18.3%	226,115	19.7%	181,618	17.8%	2,949,134	17.5%
Information	25	1.9%	565	3.0%	1,544	2.9%	73,665	6.4%	21,233	2.1%	556,246	3.3%
Management of Companies & Enterprises	0	0.0%	0	0.0%	36	0.1%	4,395	0.4%	757	0.1%	45,142	0.3%
Manufacturing	91	7.0%	2,388	12.8%	2,819	5.3%	151,271	13.2%	44,525	4.4%	1,429,636	8.5%
Mining	1	0.1%	13	0.1%	18	0.0%	521	0.0%	594	0.1%	13,733	0.1%
Professional, Scientific, & Technical Services	103	8.0%	1,362	7.3%	6,374	11.9%	110,834	9.7%	113,840	11.2%	1,307,256	7.7%
Real Estate, Rental, Leasing	59	4.6%	329	1.8%	2,292	4.3%	21,673	1.9%	44,641	4.4%	392,202	2.3%
Retail Trade	142	11.0%	2,493	13.4%	5,999	11.2%	124,575	10.9%	134,473	13.2%	2,279,739	13.5%
Transportation & Storage	10	0.8%	367	2.0%	625	1.2%	24,675	2.2%	13,644	1.3%	447,179	2.6%
Utilities	1	0.1%	41	0.2%	52	0.1%	4,417	0.4%	1,635	0.2%	65,007	0.4%
Wholesale Trade	22	1.7%	107	0.6%	1,178	2.2%	12,350	1.1%	25,988	2.5%	213,542	1.3%
Other Services	254	19.7%	2,094	11.2%	9,538	17.8%	86,215	7.5%	177,755	17.4%	2,031,465	12.0%



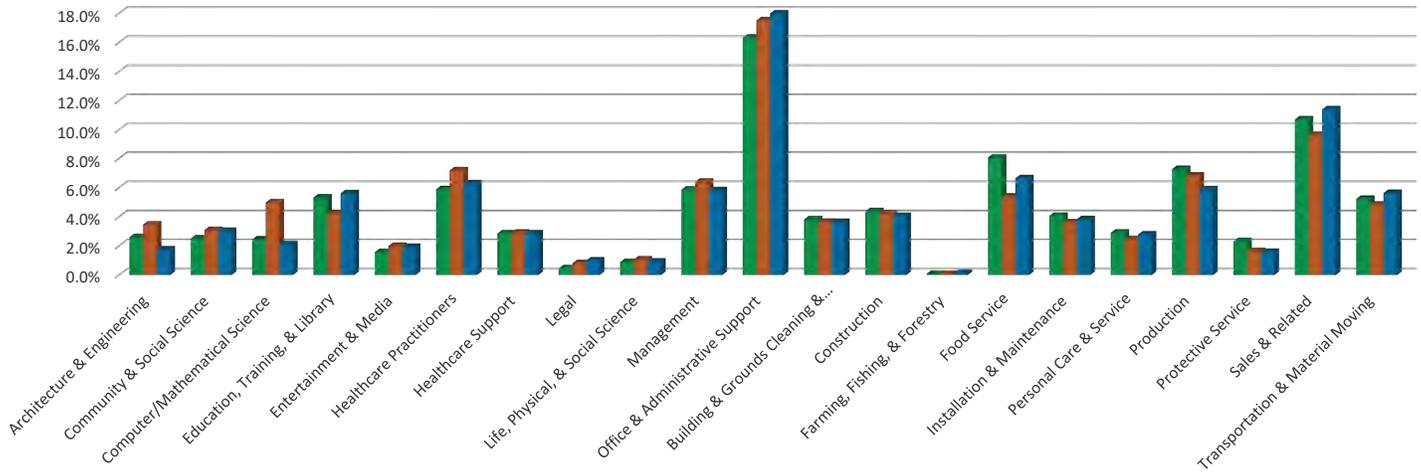
### Employment Profile

Site: City of Morgan Hill

Date Report Created: 3/31/2020

	Morgan Hill		Santa Clara		California	
Occupations	# of Employee's		# of Employee's		# of Employee's	
<b>White Collar</b>	9,369	50.3%	656,498	57.2%	8,922,200	52.8%
Architecture & Engineering	483	2.6%	39,657	3.5%	295,814	1.8%
Community & Social Science	467	2.5%	35,359	3.1%	510,843	3.0%
Computer/Mathematical Science	454	2.4%	57,109	5.0%	360,606	2.1%
Education, Training, & Library	991	5.3%	48,702	4.2%	947,546	5.6%
Entertainment & Media	291	1.6%	22,810	2.0%	324,606	1.9%
Healthcare Practitioners	1,096	5.9%	82,461	7.2%	1,062,107	6.3%
Healthcare Support	531	2.9%	33,250	2.9%	480,966	2.8%
Legal	85	0.5%	9,181	0.8%	166,518	1.0%
Life, Physical, & Social Science	164	0.9%	12,154	1.1%	154,187	0.9%
Management	1,092	5.9%	73,422	6.4%	982,362	5.8%
Office & Administrative Support	3,040	16.3%	200,870	17.5%	3,036,938	18.0%
<b>Blue Collar</b>	9,100	48.9%	485,256	42.3%	7,694,350	45.6%
Building & Grounds Cleaning & Maintenance	711	3.8%	41,810	3.6%	613,800	3.6%
Construction	815	4.4%	48,467	4.2%	685,574	4.1%
Farming, Fishing, & Forestry	16	0.1%	920	0.1%	26,930	0.2%
Food Service	1,506	8.1%	61,715	5.4%	1,121,154	6.6%
Installation & Maintenance	758	4.1%	41,372	3.6%	646,039	3.8%
Personal Care & Service	540	2.9%	28,236	2.5%	468,746	2.8%
Production	1,355	7.3%	78,285	6.8%	992,109	5.9%
Protective Service	432	2.3%	18,705	1.6%	266,330	1.6%
Sales & Related	1,992	10.7%	110,414	9.6%	1,922,562	11.4%
Transportation & Material Moving	973	5.2%	55,332	4.8%	951,106	5.6%
<b>Military Services</b>	159	0.9%	5,483	0.5%	269,185	1.6%

Employee's by Occupation



Employee Totals and History	#	#	#
Current	18,627	1,147,237	16,885,735
2019 Q3	18,027	1,114,748	16,145,070
2019 Q2	18,667	1,146,244	16,855,837
2019 Q1	18,643	1,144,401	16,736,303
2018 Q4	18,732	1,151,558	16,885,851
2018 Q3	18,146	1,118,081	16,224,295
2018 Q2	18,645	1,147,651	16,943,092
2018 Q1	18,902	1,163,371	17,390,341
2017 Q4	18,961	1,166,926	17,558,725

**Consumer Demand & Market Supply Assessment**

Site: City of Morgan Hill

Date Report Created: 3/31/2020

	Morgan Hill				Santa Clara				California			
	Consumer Demand	Market Supply	Opportunity Gap/Surplus		Consumer Demand	Market Supply	Opportunity Gap/Surplus		Consumer Demand	Market Supply	Opportunity Gap/Surplus	
<b>Demographics</b>												
Population	44,661				1,921,747				39,525,871			
5-Year Population estimate	47,063				1,960,400				40,946,687			
Population Households	44,340				1,892,144				38,721,097			
Group Quarters Population	322				29,603				804,774			
Households	14,431				655,732				13,380,512			
5-Year Households estimate	15,201				670,872				13,855,429			
WorkPlace Establishments	1,287				53,687				1,020,841			
Workplace Employees	18,627				1,147,237				16,885,735			
Median Household Income	\$117,616				\$119,650				\$73,551			
<b>By Establishments</b>												
Furniture Stores	\$9,741,590	\$0	(\$9,741,590)	-100%	\$424,424,089	\$408,671,924	(\$15,752,165)	-4%	\$7,711,286,668	\$7,547,635,964	(\$163,650,704)	-2%
Used Merchandise Stores	\$2,695,551	\$0	(\$2,695,551)	-100%	\$117,380,859	\$55,062,803	(\$62,318,056)	-53%	\$2,373,033,904	\$2,260,240,410	(\$112,793,494)	-5%
Vending Machine Operators (Non-Store)	\$5,533,897	\$0	(\$5,533,897)	-100%	\$245,652,942	\$143,652,517	(\$102,000,425)	-42%	\$4,404,241,918	\$4,365,743,179	(\$38,498,739)	-1%
Office Supplies/Stationary/Gift	\$4,634,981	\$1,887,953	(\$2,747,028)	-59%	\$208,838,323	\$116,156,528	(\$92,681,795)	-44%	\$3,646,110,562	\$3,812,604,390	\$166,493,828	5%
Specialty Food Stores	\$4,794,157	\$2,165,817	(\$2,628,340)	-55%	\$209,755,726	\$174,147,375	(\$35,608,351)	-17%	\$4,271,523,294	\$4,100,145,794	(\$171,377,500)	-4%
Health/Personal Care Stores	\$46,307,124	\$24,716,355	(\$21,590,769)	-47%	\$2,014,271,750	\$1,834,715,513	(\$179,556,237)	-9%	\$38,515,254,549	\$41,548,025,889	\$3,032,771,340	8%
Shoe Stores	\$5,427,161	\$2,918,231	(\$2,508,930)	-46%	\$238,262,225	\$320,247,763	\$81,985,538	34%	\$4,332,445,485	\$4,591,329,670	\$258,884,185	6%
Other General Merchandise Stores	\$91,650,689	\$51,035,369	(\$40,615,320)	-44%	\$4,010,374,237	\$3,422,946,069	(\$587,428,168)	-15%	\$74,586,530,546	\$85,716,937,581	\$11,130,407,035	15%
Clothing Stores	\$39,154,902	\$23,074,206	(\$16,080,696)	-41%	\$1,712,784,749	\$1,742,475,490	\$29,690,741	2%	\$31,668,843,473	\$32,627,901,680	\$959,058,207	3%
Building Material/Supplies Dealers	\$47,289,361	\$29,364,813	(\$17,924,548)	-38%	\$2,058,372,004	\$2,188,975,505	\$130,603,501	6%	\$39,576,088,752	\$46,342,754,031	\$6,766,665,279	17%
Direct Selling Establishments	\$5,323,333	\$3,448,773	(\$1,874,560)	-35%	\$232,128,195	\$142,360,093	(\$89,768,102)	-39%	\$3,527,109,103	\$2,905,107,059	(\$622,002,044)	-18%
Florists/Misc. Store Retailers	\$1,204,655	\$786,383	(\$418,272)	-35%	\$52,317,341	\$51,718,896	(\$598,445)	-1%	\$973,550,960	\$1,051,549,438	\$77,998,478	8%
Beer/Wine/Liquor Stores	\$7,627,542	\$5,360,386	(\$2,267,156)	-30%	\$334,146,633	\$257,818,281	(\$76,328,352)	-23%	\$6,077,651,012	\$6,463,833,201	\$386,182,189	6%
Other Misc. Store Retailers	\$12,675,700	\$9,341,974	(\$3,333,726)	-26%	\$550,421,004	\$427,169,554	(\$123,251,450)	-22%	\$10,109,961,052	\$10,815,844,624	\$705,883,572	7%
Automotive Dealers	\$165,456,423	\$125,799,737	(\$39,656,686)	-24%	\$7,164,680,262	\$5,822,604,430	(\$1,342,075,832)	-19%	\$131,524,014,128	\$135,988,278,312	\$4,464,264,184	3%
Gasoline Stations	\$71,828,623	\$56,415,481	(\$15,413,143)	-21%	\$3,126,928,144	\$4,396,688,249	\$1,269,760,105	41%	\$53,565,091,417	\$76,525,062,339	\$22,959,970,922	43%
Sporting Goods/Hobby/Musical Instrument	\$8,525,630	\$6,793,005	(\$1,732,624)	-20%	\$372,468,880	\$293,726,112	(\$78,742,768)	-21%	\$7,754,380,414	\$8,112,018,362	\$357,637,948	5%
Lawn/Garden Equipment/Supplies Stores	\$4,595,133	\$3,864,371	(\$730,763)	-16%	\$199,579,302	\$111,055,875	(\$88,523,427)	-44%	\$4,614,891,265	\$5,185,458,216	\$570,566,951	12%
Home Furnishing Stores	\$7,945,438	\$6,976,363	(\$969,075)	-12%	\$346,225,774	\$345,956,033	(\$269,741)	0%	\$7,133,105,993	\$7,564,900,479	\$431,794,486	6%
Grocery Stores	\$90,226,493	\$81,568,407	(\$8,658,085)	-10%	\$3,944,181,233	\$3,212,054,861	(\$732,126,372)	-19%	\$72,229,362,812	\$70,991,449,893	(\$1,237,912,919)	-2%
Electronics/Appliance	\$16,021,569	\$15,409,304	(\$612,265)	-4%	\$773,113,999	\$793,612,915	\$20,498,916	3%	\$13,021,377,704	\$12,478,673,403	(\$542,704,301)	-4%
Jewelry/Luggage/Leather Goods	\$5,497,996	\$5,343,638	(\$154,358)	-3%	\$239,902,575	\$244,308,528	\$4,405,953	2%	\$4,356,585,517	\$4,504,197,113	\$147,611,596	3%
Full-Service Restaurants	\$49,780,507	\$53,397,321	\$3,616,813	7%	\$2,610,221,783	\$2,362,358,013	(\$247,863,770)	-9%	\$38,722,028,966	\$41,429,801,984	\$2,707,773,018	7%
Automotive Parts/Accessories/Tire	\$13,406,648	\$15,130,345	\$1,723,698	13%	\$581,967,581	\$503,498,882	(\$78,468,699)	-13%	\$11,161,877,910	\$11,867,855,126	\$705,977,216	6%
Department Stores	\$19,340,294	\$22,151,812	\$2,811,518	15%	\$845,741,146	\$819,261,623	(\$26,479,523)	-3%	\$17,093,409,626	\$21,711,201,622	\$4,617,791,996	27%
Special Food Services	\$10,723,229	\$12,486,109	\$1,762,880	16%	\$536,253,450	\$457,151,112	(\$79,102,338)	-15%	\$7,747,279,601	\$8,328,307,553	\$581,027,952	7%
Limited-Service Eating Places	\$47,797,218	\$57,335,873	\$9,538,656	20%	\$2,389,285,684	\$2,189,060,336	(\$200,225,348)	-8%	\$37,081,748,567	\$40,097,180,007	\$3,015,431,440	8%
Book/Periodical/Music Stores	\$2,937,615	\$3,832,179	\$894,564	30%	\$128,667,322	\$130,876,063	\$2,208,741	2%	\$2,240,435,441	\$2,385,281,902	\$144,846,461	6%
Bar/Drinking Places (Alcoholic Beverages)	\$3,033,151	\$4,072,229	\$1,039,079	34%	\$169,695,062	\$152,452,823	(\$17,242,239)	-10%	\$2,517,224,715	\$2,745,211,226	\$227,986,511	9%
Electronic Shopping/Mail Order Houses	\$130,966,858	\$314,618,430	\$183,651,572	140%	\$5,941,098,660	\$24,671,837,588	\$18,730,738,928	315%	\$100,877,515,567	\$82,289,386,374	(\$18,588,129,193)	-18%
Other Motor Vehicle Dealers	\$9,103,869	\$42,434,739	\$33,330,869	366%	\$394,895,951	\$231,449,168	(\$163,446,783)	-41%	\$8,234,326,487	\$8,784,805,922	\$550,479,435	7%
<b>Consumer Demand/Market Supply Index</b>	<b>\$941,247,336</b>	<b>\$981,729,603</b>	<b>96</b>		<b>\$42,174,036,885</b>	<b>\$58,024,070,922</b>	<b>73</b>		<b>\$751,648,287,408</b>	<b>\$795,138,722,743</b>	<b>95</b>	



**Consumer Demand & Market Supply Assessment**

Site: City of Morgan Hill

Date Report Created: 3/31/2020

By Major Product Lines	Morgan Hill				Santa Clara				California			
	Consumer Demand	Market Supply	Opportunity Gap/Surplus		Consumer Demand	Market Supply	Opportunity Gap/Surplus		Consumer Demand	Market Supply	Opportunity Gap/Surplus	
Dimensional Lumber/Other Building Materials	\$19,235,775	\$12,883,646	(\$6,352,129)	-33%	\$838,099,582	\$954,911,156	\$116,811,574	14%	\$15,978,930,586	\$19,445,954,246	\$3,467,023,660	22%
Paints/Sundries/Wallpaper/Wall Coverings	\$3,448,423	\$2,362,076	(\$1,086,347)	-32%	\$149,513,504	\$174,169,868	\$24,656,364	16%	\$2,894,475,511	\$3,557,115,548	\$662,640,037	23%
Groceries/Other Food Items (Off Premises)	\$138,729,625	\$103,680,044	(\$35,049,581)	-25%	\$6,045,668,536	\$5,365,303,077	(\$680,365,459)	-11%	\$112,846,800,009	\$110,604,387,672	(\$2,242,412,337)	-2%
Cigars/Cigarettes/Tobacco/Accessories	\$10,052,014	\$7,910,905	(\$2,141,109)	-21%	\$432,164,477	\$483,058,739	\$50,894,262	12%	\$8,305,252,245	\$10,288,435,002	\$1,983,182,757	24%
Pets/Pet Foods/Pet Supplies	\$7,494,353	\$6,065,027	(\$1,429,326)	-19%	\$325,940,757	\$340,672,641	\$14,731,884	5%	\$6,675,636,373	\$4,892,283,008	(\$1,783,353,365)	-27%
Automotive Fuels	\$66,672,646	\$55,673,792	(\$10,998,854)	-16%	\$2,897,199,500	\$4,202,233,975	\$1,305,034,475	45%	\$49,260,845,977	\$72,873,338,128	\$23,612,492,151	48%
Alcoholic Drinks Served at the Establishment	\$23,378,496	\$19,928,797	(\$3,449,699)	-15%	\$1,322,536,881	\$850,600,694	(\$471,936,187)	-36%	\$18,718,338,233	\$16,113,196,512	(\$2,605,141,721)	-14%
Furniture/Sleep/Outdoor/Patio Furniture	\$25,936,103	\$22,776,127	(\$3,159,976)	-12%	\$1,129,755,961	\$2,090,244,437	\$960,488,476	85%	\$19,900,010,066	\$16,554,680,372	(\$3,345,329,694)	-17%
Packaged Liquor/Wine/Beer	\$16,878,028	\$14,854,840	(\$2,023,188)	-12%	\$735,950,740	\$846,957,034	\$111,006,294	15%	\$13,299,756,649	\$14,077,738,340	\$777,981,691	6%
Major Household Appliances	\$3,453,776	\$3,121,990	(\$331,786)	-10%	\$150,192,486	\$192,339,075	\$42,146,589	28%	\$2,754,942,916	\$3,632,896,441	\$877,953,525	32%
Automotive Lubricants (incl Oil, Greases)	\$3,453,776	\$3,121,990	(\$331,786)	-10%	\$150,192,486	\$192,339,075	\$42,146,589	28%	\$2,754,942,916	\$3,632,896,441	\$877,953,525	32%
Hardware/Tools/Plumbing/Electrical Supplies	\$13,381,224	\$12,292,542	(\$1,088,682)	-8%	\$582,905,585	\$903,152,986	\$320,247,401	55%	\$11,053,452,985	\$13,405,627,339	\$2,352,174,354	21%
Autos/Cars/Vans/Trucks/Motorcycles	\$145,304,709	\$133,815,505	(\$11,489,203)	-8%	\$6,288,472,150	\$5,228,998,776	(\$1,059,473,374)	-17%	\$115,855,814,428	\$120,130,246,188	\$4,274,431,760	4%
Optical Goods (incl Eyeglasses, Sunglasses)	\$2,290,154	\$2,210,053	(\$80,101)	-3%	\$99,636,102	\$160,950,443	\$61,314,341	62%	\$1,629,525,910	\$2,213,459,475	\$583,933,565	36%
Floor/Floor Coverings	\$6,420,139	\$6,230,710	(\$189,429)	-3%	\$278,910,238	\$402,499,730	\$123,589,492	44%	\$5,637,958,782	\$6,280,622,361	\$642,663,579	11%
Soaps/Detergents/Household Cleaners	\$4,139,354	\$4,262,302	\$122,948	3%	\$180,132,046	\$240,852,290	\$60,720,244	34%	\$3,488,716,416	\$4,549,413,588	\$1,060,697,172	30%
Paper/Related Products	\$3,572,227	\$3,724,073	\$151,846	4%	\$155,082,687	\$214,153,853	\$59,071,166	38%	\$3,049,548,456	\$4,136,874,815	\$1,087,326,359	36%
Footwear, including Accessories	\$13,303,069	\$14,002,196	\$699,126	5%	\$584,242,117	\$1,105,852,898	\$521,610,781	89%	\$10,706,115,436	\$10,217,460,591	(\$488,654,845)	-5%
Computer Hardware/Software/Supplies	\$23,938,469	\$26,932,225	\$2,993,756	13%	\$1,372,110,314	\$2,021,982,168	\$649,871,854	47%	\$18,848,236,245	\$15,481,932,386	(\$3,366,303,859)	-18%
Lawn/Garden/Farm Equipment/Supplies	\$13,038,354	\$14,705,394	\$1,667,039	13%	\$566,028,271	\$912,289,020	\$346,260,749	61%	\$11,716,886,619	\$12,664,750,777	\$947,864,158	8%
Drugs/Health Aids/Beauty Aids/Cosmetics	\$108,120,785	\$123,513,405	\$15,392,620	14%	\$4,702,775,352	\$9,211,186,500	\$4,508,411,148	96%	\$85,923,015,094	\$77,779,311,460	(\$8,143,703,634)	-9%
Automotive Tires/Tubes/Batteries/Parts	\$26,549,478	\$30,851,226	\$4,301,747	16%	\$1,152,433,388	\$1,524,771,980	\$372,338,592	32%	\$22,267,128,761	\$20,811,188,095	(\$1,455,940,666)	-7%
Retailer Services	\$29,195,151	\$34,156,650	\$4,961,499	17%	\$1,268,822,608	\$1,442,065,541	\$173,242,933	14%	\$22,586,493,753	\$24,317,804,346	\$1,731,310,593	8%
Meats/Nonalcoholic Beverages	\$93,340,658	\$109,881,504	\$16,540,846	18%	\$4,659,521,816	\$4,478,524,917	(\$180,996,899)	-4%	\$71,345,528,677	\$80,479,358,090	\$9,133,829,413	13%
Womens/Juniors/Misses Wear	\$33,171,564	\$42,554,696	\$9,383,132	28%	\$1,447,819,379	\$3,083,618,445	\$1,635,799,066	113%	\$27,489,496,945	\$27,613,045,748	\$123,548,803	0%
Photographic Equipment/Supplies	\$945,892	\$1,287,025	\$341,133	36%	\$41,140,506	\$83,619,780	\$42,479,274	103%	\$796,616,242	\$1,158,815,543	\$362,199,301	45%
Household Fuels (incl Oil, LP gas, Wood, Coal)	\$1,973,585	\$2,705,182	\$731,597	37%	\$85,156,986	\$119,634,276	\$34,477,290	40%	\$1,355,379,034	\$2,045,135,926	\$689,756,892	51%
All Other Merchandise	\$36,166,935	\$50,867,075	\$14,700,139	41%	\$1,573,288,378	\$3,358,532,473	\$1,785,244,095	113%	\$28,419,481,978	\$29,329,269,087	\$909,787,109	3%
Jewelry (including Watches)	\$8,356,737	\$11,846,970	\$3,490,233	42%	\$364,771,475	\$748,172,609	\$383,401,134	105%	\$6,554,902,822	\$7,338,758,668	\$783,855,846	12%
Televisions/VCR/Video Cameras/DVD etc	\$5,653,026	\$8,231,781	\$2,578,755	46%	\$245,829,959	\$551,399,360	\$305,569,401	124%	\$4,733,901,685	\$6,893,680,087	\$2,159,778,402	46%
Audio Equipment/Musical Instruments	\$5,150,433	\$7,598,503	\$2,448,070	48%	\$224,083,345	\$538,043,763	\$313,960,418	140%	\$4,164,230,075	\$4,620,069,971	\$455,839,896	11%
Childrens Wear/Infants/Toddlers Clothing	\$5,283,803	\$7,980,031	\$2,696,228	51%	\$234,275,014	\$545,960,605	\$311,685,591	133%	\$4,470,454,198	\$5,866,898,683	\$1,396,444,485	31%
Kitchenware/Home Furnishings	\$10,777,750	\$16,492,719	\$5,714,969	53%	\$472,043,274	\$1,188,704,740	\$716,661,466	152%	\$8,749,736,423	\$9,435,998,271	\$686,261,848	8%
Mens Wear	\$12,967,255	\$19,960,665	\$6,993,410	54%	\$568,479,197	\$1,387,063,693	\$818,584,496	144%	\$10,640,111,347	\$12,024,563,688	\$1,384,452,341	13%
Sewing/Knitting Materials/Supplies	\$343,842	\$542,005	\$198,162	58%	\$14,739,743	\$32,206,525	\$17,466,782	119%	\$310,053,177	\$438,862,705	\$128,809,528	42%
Small Electric Appliances	\$1,939,442	\$3,508,235	\$1,568,793	81%	\$84,115,157	\$252,338,321	\$168,223,164	200%	\$1,552,770,909	\$1,849,270,194	\$296,499,285	19%
Books/Periodicals	\$3,676,188	\$6,867,713	\$3,191,525	87%	\$159,128,663	\$420,770,946	\$261,642,283	164%	\$3,019,977,458	\$3,233,696,547	\$213,719,089	7%
Curtains/Draperies/Slipcovers/Bed/Coverings	\$3,964,501	\$7,604,334	\$3,639,832	92%	\$173,080,372	\$535,137,315	\$362,056,943	209%	\$3,303,412,647	\$4,373,580,665	\$1,070,168,018	32%
Toys/Hobby Goods/Games	\$4,112,055	\$8,959,622	\$4,847,567	118%	\$179,852,556	\$621,082,141	\$441,229,585	245%	\$3,648,690,523	\$4,942,168,432	\$1,293,477,909	35%
Sporting Goods (incl Bicycles/Sports Vehicles)	\$7,441,278	\$17,315,523	\$9,874,245	133%	\$325,328,043	\$1,145,297,765	\$819,969,722	252%	\$6,436,080,498	\$8,028,901,909	\$1,592,821,411	25%



## Consumer Demand & Market Supply Assessment

Site: City of Morgan Hill

Date Report Created: 3/31/2020

Morgan Hill

Santa Clara

California

Data for this report is provided via the Market Outlook database from Synergos Technologies, Inc (STI).

Market Outlook is based on the following -

- the Consumer Expenditure Survey (CE), a program of the Bureau of Labor Statistics (BLS);
- the U.S. Census Bureau's monthly and annual Retail Trade (CRT) reports;
- the Census Bureau's Economic Census; with supporting demographic data from STI: PopStats data and STI: WorkPlace.

Market Outlook data covers 31 leading retail segments and 40 major product and service lines.

The difference between demand and supply represents the opportunity gap or surplus available for each retail outlet cited on the Market Outlook report for the specified trade area or reporting geography. When the demand is greater than (or less than) the supply, there is an opportunity gap (or surplus) for that retail outlet. In other words, a negative value signifies an opportunity gap where the Consumer Demand is higher than the Market Supply, while a positive value signifies a surplus.

Consumer Demand/Market Supply Index:

n = 100 (Equilibrium)

n > 100 suggests demand is not being fully met within the market, consumers are leaving the area to shop

n < 100 suggests supply exceeds demand, attracting consumers from outside the defined area

# Household Segmentation Profile

Site: City of Morgan Hill

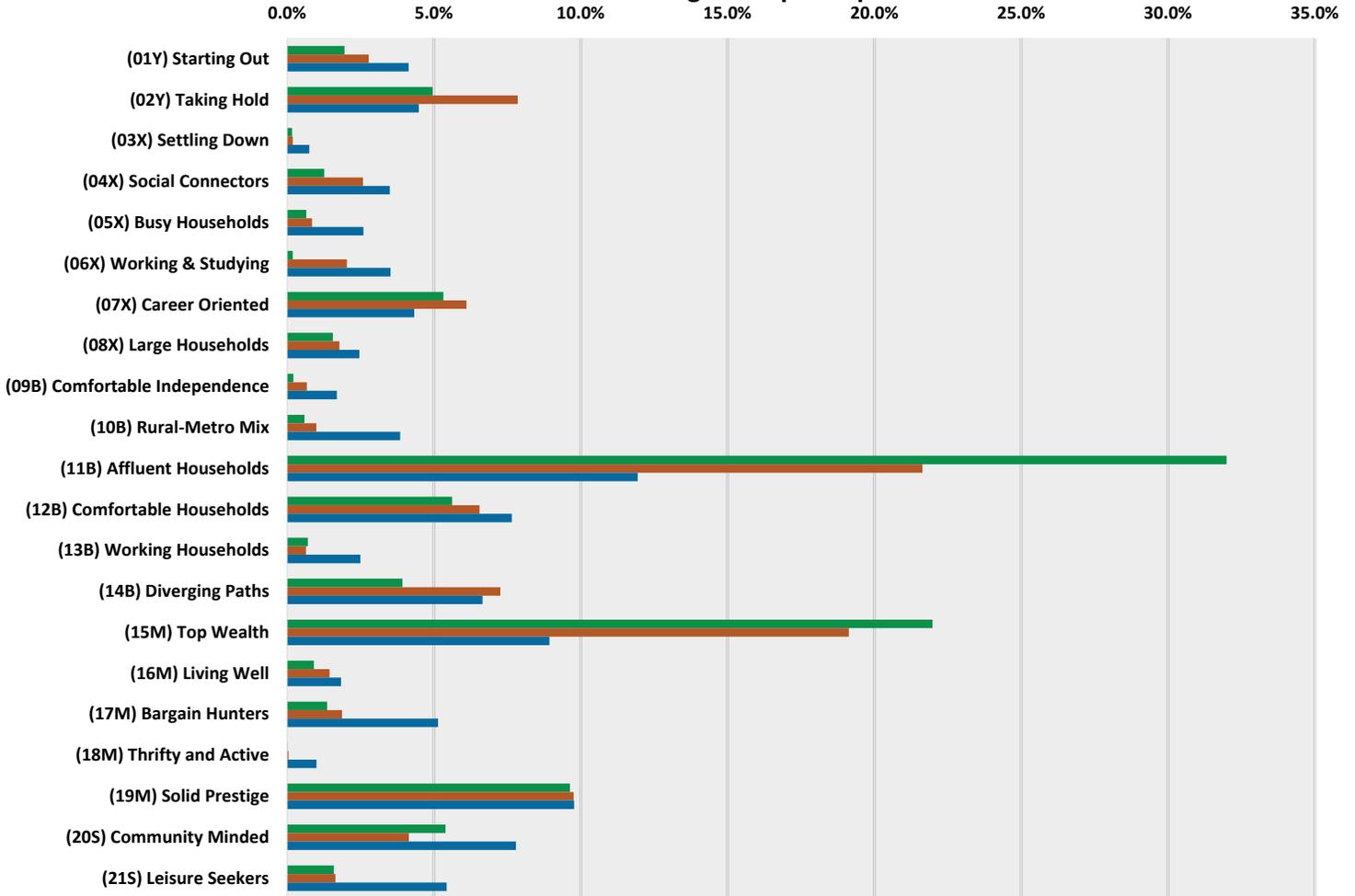


Hdl ECON Solutions

Date: 3/31/2020

	Trade Area 1: Morgan Hill	Trade Area 2: Santa Clara	Trade Area 3: California
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## Household Lifestage Group Comparison



	Morgan Hill	Santa Clara	California
<b>Total Households</b>	<b>14,183</b>	<b>642,072</b>	<b>13,085,935</b>
	<b>100%</b>	<b>100%</b>	<b>100%</b>

Rank *	Cluster	Lifestage Group	Households	%	Households	%	Households	%
1	01- Summit Estates	(11B) Affluent Households	2,341	16.5%	73,990	11.5%	614,737	4.7%
2	02- Established Elite	(15M) Top Wealth	1,870	13.2%	75,942	11.8%	639,857	4.9%
3	04- Top Professionals	(11B) Affluent Households	1,761	12.4%	48,801	7.6%	718,728	5.5%
4	03- Corporate Connected	(15M) Top Wealth	1,247	8.8%	46,864	7.3%	529,308	4.0%
5	24- Career Building	(02Y) Taking Hold	551	3.9%	44,125	6.9%	423,746	3.2%
6	33- Urban Diversity	(14B) Diverging Paths	511	3.6%	42,510	6.6%	672,512	5.1%
7	09- Busy Schedules	(19M) Solid Prestige	509	3.6%	25,246	3.9%	587,453	4.5%
8	13- Work & Play	(12B) Comfortable Households	503	3.5%	27,035	4.2%	498,256	3.8%
9	07- Active Lifestyles	(11B) Affluent Households	435	3.1%	16,129	2.5%	228,623	1.7%
10	05- Active & Involved	(19M) Solid Prestige	433	3.1%	19,746	3.1%	304,840	2.3%

\* Rank is based on Trade Area 1 cluster size



Uses the Personix household segmentation system. More information about each cluster and lifestage group is available by clicking on the respective category.

## Household Segmentation Profile

Market:

0

Date: 3/31/2020

TOTAL HOUSEHOLDS		14,183	100%	642,072	100%	13,085,935	100%
Lifestage Group	Cluster Name	Morgan Hill		Santa Clara		California	
<b>(01Y) Starting Out</b>		<b>277</b>	<b>2.0%</b>	<b>17,840</b>	<b>2.8%</b>	<b>541,612</b>	<b>4.1%</b>
	<a href="#">39- Setting Goals</a>	23	0.2%	1,581	0.2%	106,720	0.8%
	<a href="#">45- Offices &amp; Entertainment</a>	46	0.3%	4,115	0.6%	97,798	0.7%
	<a href="#">57- Collegiate Crowd</a>	180	1.3%	9,464	1.5%	167,492	1.3%
	<a href="#">58- Outdoor Fervor</a>	0	0.0%	256	0.0%	35,895	0.3%
	<a href="#">67- First Steps</a>	28	0.2%	2,424	0.4%	133,707	1.0%
<b>(02Y) Taking Hold</b>		<b>703</b>	<b>5.0%</b>	<b>50,427</b>	<b>7.9%</b>	<b>586,957</b>	<b>4.5%</b>
	<a href="#">18- Climbing the Ladder</a>	15	0.1%	725	0.1%	20,941	0.2%
	<a href="#">21- Children First</a>	120	0.8%	4,894	0.8%	110,455	0.8%
	<a href="#">24- Career Building</a>	551	3.9%	44,125	6.9%	423,746	3.2%
	<a href="#">30- Out &amp; About</a>	17	0.1%	683	0.1%	31,815	0.2%
<b>(03X) Settling Down</b>		<b>24</b>	<b>0.2%</b>	<b>1,240</b>	<b>0.2%</b>	<b>99,132</b>	<b>0.8%</b>
	<a href="#">34- Outward Bound</a>	0	0.0%	65	0.0%	15,482	0.1%
	<a href="#">41- Rural Adventure</a>	8	0.1%	110	0.0%	17,740	0.1%
	<a href="#">46- Rural &amp; Active</a>	17	0.1%	1,065	0.2%	65,910	0.5%
<b>(04X) Social Connectors</b>		<b>179</b>	<b>1.3%</b>	<b>16,584</b>	<b>2.6%</b>	<b>458,059</b>	<b>3.5%</b>
	<a href="#">42- Creative Variety</a>	15	0.1%	1,959	0.3%	83,376	0.6%
	<a href="#">52- Stylish &amp; Striving</a>	88	0.6%	6,480	1.0%	158,546	1.2%
	<a href="#">59- Mobile Mixers</a>	76	0.5%	8,145	1.3%	216,137	1.7%
<b>(05X) Busy Households</b>		<b>93</b>	<b>0.7%</b>	<b>5,439</b>	<b>0.8%</b>	<b>340,367</b>	<b>2.6%</b>
	<a href="#">37- Firm Foundations</a>	21	0.1%	1,362	0.2%	115,618	0.9%
	<a href="#">62- Movies &amp; Sports</a>	72	0.5%	4,077	0.6%	224,749	1.7%
<b>(06X) Working &amp; Studying</b>		<b>27</b>	<b>0.2%</b>	<b>13,093</b>	<b>2.0%</b>	<b>461,142</b>	<b>3.5%</b>
	<a href="#">61- City Life</a>	0	0.0%	10,688	1.7%	301,782	2.3%
	<a href="#">69- Productive Havens</a>	13	0.1%	587	0.1%	50,588	0.4%
	<a href="#">70- Favorably Frugal</a>	15	0.1%	1,818	0.3%	108,772	0.8%
<b>(07X) Career Oriented</b>		<b>755</b>	<b>5.3%</b>	<b>39,220</b>	<b>6.1%</b>	<b>566,271</b>	<b>4.3%</b>
	<a href="#">06- Casual Comfort</a>	395	2.8%	14,667	2.3%	204,138	1.6%
	<a href="#">10- Careers &amp; Travel</a>	68	0.5%	5,386	0.8%	69,272	0.5%
	<a href="#">20- Carving Out Time</a>	18	0.1%	759	0.1%	28,593	0.2%
	<a href="#">26- Getting Established</a>	274	1.9%	18,408	2.9%	264,268	2.0%
<b>(08X) Large Households</b>		<b>221</b>	<b>1.6%</b>	<b>11,460</b>	<b>1.8%</b>	<b>322,106</b>	<b>2.5%</b>
	<a href="#">11- Schools &amp; Shopping</a>	67	0.5%	4,664	0.7%	70,654	0.5%
	<a href="#">12- On the Go</a>	89	0.6%	3,790	0.6%	82,562	0.6%
	<a href="#">19- Country Comfort</a>	3	0.0%	385	0.1%	63,508	0.5%
	<a href="#">27- Tenured Proprietors</a>	62	0.4%	2,621	0.4%	105,382	0.8%
<b>(09B) Comfortable Independence</b>		<b>30</b>	<b>0.2%</b>	<b>4,320</b>	<b>0.7%</b>	<b>221,949</b>	<b>1.7%</b>
	<a href="#">29- City Mixers</a>	0	0.0%	2,632	0.4%	132,992	1.0%
	<a href="#">35- Working &amp; Active</a>	13	0.1%	874	0.1%	43,922	0.3%
	<a href="#">56- Metro Active</a>	17	0.1%	814	0.1%	45,035	0.3%
<b>(10B) Rural-Metro Mix</b>		<b>84</b>	<b>0.6%</b>	<b>6,408</b>	<b>1.0%</b>	<b>503,927</b>	<b>3.9%</b>
	<a href="#">47- Rural Parents</a>	0	0.0%	185	0.0%	53,162	0.4%
	<a href="#">53- Metro Strivers</a>	83	0.6%	5,895	0.9%	395,102	3.0%
	<a href="#">60- Rural &amp; Mobile</a>	1	0.0%	328	0.1%	55,663	0.4%



Uses the Personix household life stage segmentation system. More information about each cluster and lifestage group is available by clicking on the respective category.

## Household Segmentation Profile

Market:

0

Date: 3/31/2020

TOTAL HOUSEHOLDS		14,183	100%	642,072	100%	13,085,935	100%
Lifestage Group	Cluster Name	Morgan Hill		Santa Clara		California	
<b>(11B) Affluent Households</b>		<b>4,537</b>	<b>32.0%</b>	<b>138,920</b>	<b>21.6%</b>	<b>1,562,088</b>	<b>11.9%</b>
	<a href="#">01- Summit Estates</a>	2,341	16.5%	73,990	11.5%	614,737	4.7%
	<a href="#">04- Top Professionals</a>	1,761	12.4%	48,801	7.6%	718,728	5.5%
	<a href="#">07- Active Lifestyles</a>	435	3.1%	16,129	2.5%	228,623	1.7%
<b>(12B) Comfortable Households</b>		<b>797</b>	<b>5.6%</b>	<b>42,081</b>	<b>6.6%</b>	<b>1,001,369</b>	<b>7.7%</b>
	<a href="#">13- Work &amp; Play</a>	503	3.5%	27,035	4.2%	498,256	3.8%
	<a href="#">17- Firmly Established</a>	294	2.1%	15,046	2.3%	503,113	3.8%
<b>(13B) Working Households</b>		<b>101</b>	<b>0.7%</b>	<b>4,123</b>	<b>0.6%</b>	<b>326,704</b>	<b>2.5%</b>
	<a href="#">38- Occupational Mix</a>	101	0.7%	4,060	0.6%	292,662	2.2%
	<a href="#">48- Farm &amp; Home</a>	0	0.0%	63	0.0%	34,042	0.3%
<b>(14B) Diverging Paths</b>		<b>557</b>	<b>3.9%</b>	<b>46,636</b>	<b>7.3%</b>	<b>870,780</b>	<b>6.7%</b>
	<a href="#">16- Country Enthusiasts</a>	1	0.0%	255	0.0%	27,972	0.2%
	<a href="#">22- Comfortable Cornerstones</a>	19	0.1%	693	0.1%	32,099	0.2%
	<a href="#">31- Mid-Americana</a>	27	0.2%	1,369	0.2%	58,951	0.5%
	<a href="#">32- Metro Mix</a>	0	0.0%	1,809	0.3%	79,246	0.6%
	<a href="#">33- Urban Diversity</a>	511	3.6%	42,510	6.6%	672,512	5.1%
<b>(15M) Top Wealth</b>		<b>3,117</b>	<b>22.0%</b>	<b>122,806</b>	<b>19.1%</b>	<b>1,169,165</b>	<b>8.9%</b>
	<a href="#">02- Established Elite</a>	1,870	13.2%	75,942	11.8%	639,857	4.9%
	<a href="#">03- Corporate Connected</a>	1,247	8.8%	46,864	7.3%	529,308	4.0%
<b>(16M) Living Well</b>		<b>130</b>	<b>0.9%</b>	<b>9,292</b>	<b>1.4%</b>	<b>240,474</b>	<b>1.8%</b>
	<a href="#">14- Career Centered</a>	101	0.7%	8,111	1.3%	151,953	1.2%
	<a href="#">15- Country Ways</a>	2	0.0%	243	0.0%	32,113	0.2%
	<a href="#">23- Good Neighbors</a>	26	0.2%	938	0.1%	56,408	0.4%
<b>(17M) Bargain Hunters</b>		<b>193</b>	<b>1.4%</b>	<b>12,000</b>	<b>1.9%</b>	<b>672,948</b>	<b>5.1%</b>
	<a href="#">43- Work &amp; Causes</a>	16	0.1%	1,335	0.2%	74,603	0.6%
	<a href="#">44- Open Houses</a>	27	0.2%	1,655	0.3%	99,854	0.8%
	<a href="#">55- Community Life</a>	36	0.3%	1,334	0.2%	94,963	0.7%
	<a href="#">63- Staying Home</a>	103	0.7%	6,866	1.1%	351,014	2.7%
	<a href="#">68- Staying Healthy</a>	11	0.1%	810	0.1%	52,514	0.4%
<b>(18M) Thrifty &amp; Active</b>		<b>1</b>	<b>0.0%</b>	<b>316</b>	<b>0.0%</b>	<b>130,786</b>	<b>1.0%</b>
	<a href="#">40- Great Outdoors</a>	0	0.0%	58	0.0%	19,667	0.2%
	<a href="#">50- Rural Community</a>	1	0.0%	224	0.0%	86,165	0.7%
	<a href="#">54- Work &amp; Outdoors</a>	0	0.0%	34	0.0%	24,954	0.2%
<b>(19M) Solid Prestige</b>		<b>1,366</b>	<b>9.6%</b>	<b>62,651</b>	<b>9.8%</b>	<b>1,278,689</b>	<b>9.8%</b>
	<a href="#">05- Active &amp; Involved</a>	433	3.1%	19,746	3.1%	304,840	2.3%
	<a href="#">08- Solid Surroundings</a>	424	3.0%	17,659	2.8%	386,396	3.0%
	<a href="#">09- Busy Schedules</a>	509	3.6%	25,246	3.9%	587,453	4.5%
<b>(20S) Community Minded</b>		<b>765</b>	<b>5.4%</b>	<b>26,645</b>	<b>4.1%</b>	<b>1,020,108</b>	<b>7.8%</b>
	<a href="#">25- Clubs &amp; Causes</a>	104	0.7%	3,140	0.5%	148,658	1.1%
	<a href="#">28- Community Pillars</a>	236	1.7%	7,546	1.2%	207,630	1.6%
	<a href="#">36- Persistent &amp; Productive</a>	426	3.0%	15,959	2.5%	663,820	5.1%
<b>(21S) Leisure Seekers</b>		<b>226</b>	<b>1.6%</b>	<b>10,571</b>	<b>1.6%</b>	<b>711,302</b>	<b>5.4%</b>
	<a href="#">49- Home &amp; Garden</a>	49	0.3%	2,132	0.3%	138,418	1.1%
	<a href="#">51- Role Models</a>	18	0.1%	1,407	0.2%	105,163	0.8%
	<a href="#">64- Practical &amp; Careful</a>	70	0.5%	2,444	0.4%	159,536	1.2%
	<a href="#">65- Hobbies &amp; Shopping</a>	51	0.4%	1,892	0.3%	135,282	1.0%
	<a href="#">66- Helping Hands</a>	37	0.3%	2,696	0.4%	172,903	1.3%



Uses the Personix household life stage segmentation system. More information about each cluster and lifestage group is available by clicking on the respective category.