Morgan Hill, California

Indicators Report

by
The National Economic Education Delegation (NEED)

April 20, 2024

Exploring the economics, demographics, and well-being of Morgan Hill and its residents through indicators.

This report was produced by the:

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Executive Summary

Assessing the City with Indicators

About this Report

This report provides background or summary information for the city of Morgan Hill (the City) in the form of indicators.

Using this Report

Indicators are measures of various aspects of a regional economy. They help to provide an indication of the quality of life in a region and progress toward improving conditions in the local economy. This report focuses on indicators for changing demographics, incomes, housing markets, commute patterns, and employment in Morgan Hill. These indicators are compared to Santa Clara County (the County) as a whole, a broader region where one is well defined, California, and the United Sates.

This report is vital for understanding trends in the underlying economy. It does not provide forecasts, but Rob Eyler and Jon Haveman at Economic Forensics and Analytics are available to provide them if that is of interest.

Topics Covered:

- **Demographics:** A detailed snopshot of Morgan Hill demographics is presented. This provides evidence on the size, age and sex, income and poverty status, race and ethnicity, housing status, living arrangements, education, health, and transportation choices of the population. Beyond the current population level, data on trends in local population growth, in comparison with other broader regions is presented, in both tabular and graphical form.
- **Employment Report:** Here, we provide a brief snapshot or employment and unemployment in Morgan Hill and how the City's experience differs from broader regions.
- **Income and Earnings:** Vital to understanding the prosperity of a city relative to its surrounding area is information on income and earnings. We provide a ranking of the City's income relative to all cities in California as well as growth relative to local regions. Inequality and poverty status are also important indicators for the level of equity in the community. We provide evidence of trends in both, not only for all residents, but also for children separately.
- **Housing:** This section provides evidence on the cost and availability of housing. Both median home values and rental costs are included, along with detailed information on home ownership, by age and income, in particular. Further, evidence is provided on the housing burden in the City, again, in comparison with other broader regions. We also provide evidence on the rate at which new buildings and units are permitted along with a broader housing picture. Finally, we provide evidence on the age of the housing stock in Morgan Hill, along with information on how long the City's residents have been in place.
- **Transportation:** Increasingly important, in the wake of the pandemic, is an understanding of the transportation patterns and choices of local residents. We provide detailed evidence on the proprotion of residents who work from home and on the various transportation choices of those who head to the office. This information is also provided for those who work in Morgan Hill, but do not necessarily live in Morgan Hill.
- **Migration:** Population changes comes primarily through organic causes: births and deaths. Migration between regions also plays a significant role in population growth. A final section of the report provides evidence on migration into and out of the City.

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Demographics

Definition:

Data on the demographics of a city indicate the nature of the population, with a focus on age, gender, race and ethnicity, as well as household compositon.

Why is it important?

The characteristics and growth of Morgan Hill's population are fundamental indicators of the city's growth potential.

A Demographic Snapshot

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Statistic	2022	2019
POPULATION		
Population Estimate (#, 5yr)	45,291.0	44,686.0
Veterans (#, 5yr)	1,788.0	2,208.0
Foreign born persons (%, 5yr)	20.8	18.0
Population age 25+ (#, 5yr)	30,013.0	29,879.0
AGE AND SEX		
Persons under 5 years (%, 5yr)	7.6	6.7
Persons under 18 years (%, 5yr)	26.0	26.0
Persons 65 years and over (%, 5yr)	14.7	14.0
Female persons (%, 5yr)	52.1	51.5
INCOME AND POVERTY		
Median household income ($, 5yr)	152,199.0	124,419.0
Per capita income in past 12 months ($, 5yr)	62,116.0	53,500.0
Persons in poverty (%, 5yr)	3.7	4.7
Children age less than 18 in poverty (#, 5yr)	557.0	730.0
Children age less than 18 in poverty (%, 5yr)	4.8	6.4
RACE AND ETHNICITY		
White alone (%, 5yr)	56.0	73.0
African American alone (%, 5yr)	2.3	1.9
American Indian or Alaska Native alone (%, 5yr)	0.5	0.4
Asian alone (%, 5yr)	16.3	14.0
Native Hawaiian and Other Pacific Islander alone (%, 5yr)	0.1	0.1
Two or More Races (%, 5yr)	19.3	6.3
Hispanic or Latino (%, 5yr)	33.5	31.3
White alone, not Hispanic or Latino (%, 5yr)	42.6	49.0
HOUSING		
Housing units (#, 5yr)	15,054.0	15,233.0
Owner-occupied housing units (%, 5yr)	71.7	73.9
Median value of owner-occupied housing units ($, 5yr)	1,066,800.0	855,100.0
Median selected monthly owner costs-with a mortgage ($, 5yr)	3,981.0	3,420.0
Median selected monthly owner costs-without a mortgage ($, 5yr)	918.0	803.0
Median gross rent ($, 5yr)	2,249.0	1,763.0
FAMILIES AND LIVING ARRANGEMENTS		
Households (#, 5yr)	14,575.0	14,854.0
Persons per household (#, 5yr)	3.1	3.0
Living in same house 1 year ago, % of persons age 1+ (5yr)	87.9	87.6
EDUCATION		
High school graduate or higher, % of persons age 25+ (5yr)	91.5	92.2
Bachelor's degree or higher, % of persons age 25+ (5yr)	45.7	43.9
HEALTH		
With a disability, under age 65 years (#, 5yr)	2,293.0	2,159.0
Persons without health insurance, under age 65 years (%, 5yr)	2.4	3.1
LABOR FORCE		
In civilian labor force, persons age 16+ (%, 5yr)	66.5	67.4
In civilian labor force, women age 16+ (%, 5yr)	59.9	61.0
Employed, persons age 16+ (%, 5yr)	60.9	62.5
Self employed (%, 5yr)	10.1	10.2
TRANSPORTATION		
Mean travel time to work, workers age 16+ (Mins., 5yr)	29.4	35.6
Drive alone in private vehicle (%, 5yr)	68.4	77.6
Using public transportation (%, 5yr)	3.7	7.2
Worked from home (%, 5yr)	16.8	5.5

Source: American Community Survey, Summary Files
Note: Data are from the 1-year files unless indicated by the notation 5yr.

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Current Population

The data in these two tables and the following two graphs are from the CA Department of Finance (DOF). The DOF produces population estimates for geographies around California twice a year: January and July. As estimates for cities are only available in January, these two tables are based on the January data. The remaining figures are from the American Community Survey (ACS), provided annually by the U.S. Bureau of the Census.

Table 1. Population Change by Region
(Thousands, January to January)

Region	2023 Population	% Change 1 Year	% Change 3 Year	% Change 5 Year
City				
Morgan Hill	45,892	−0.67	−0.88	2.77
County and Broader Regions				
Santa Clara County	1,886,079	−0.26	−3.04	−3.17
Bay Area	7,548,792	−0.45	−2.58	−2.62
California	38,940,231	−0.35	−1.79	−2.01

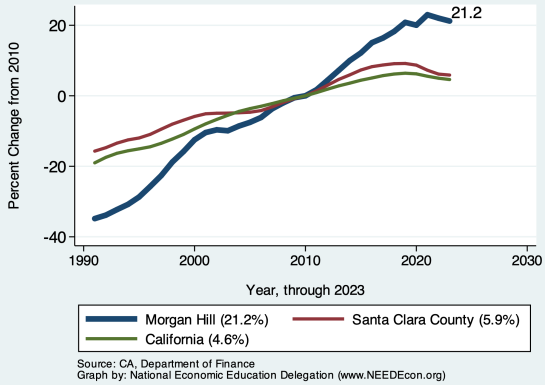
Source: CA DOF; Calculations by National Economic Education Delegation

Table 2. County Population Change by City
(Thousands, January to January)

City	2022	2023	% Change Local	% Change Bay Area	% Change California
Santa Clara County	1,891.0	1,886.1	−0.26	−0.45	−0.35
San Jose	963.7	959.3	−0.47		
Sunnyvale	156.4	156.3	−0.03		
Santa Clara	130.5	132.5	1.54		
Mountain View	83.9	83.6	−0.30		
Milpitas	80.9	81.1	0.25		
Palo Alto	67.7	67.3	−0.60		
Gilroy	59.7	60.1	0.62		
Cupertino	59.7	59.2	−0.87		
Morgan Hill	46.2	45.9	−0.67		
Campbell	43.1	42.7	−0.88		
Los Gatos	33.2	33.1	−0.20		
Los Altos	31.3	31.0	−0.76		
Saratoga	30.8	30.6	−0.62		
Los Altos Hills	8.4	8.4	−0.40		
Monte Sereno	3.5	3.5	1.09		

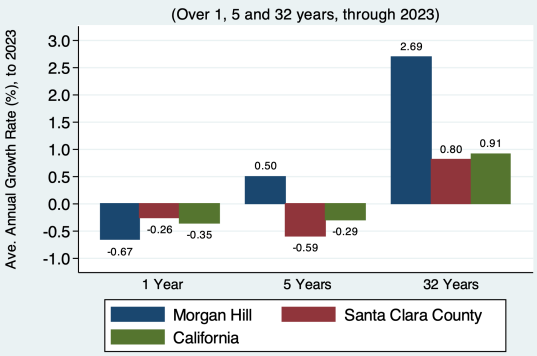
Source: CA DOF; Calculations by National Economic Education Delegation

Figure 1: Population Growth (1)



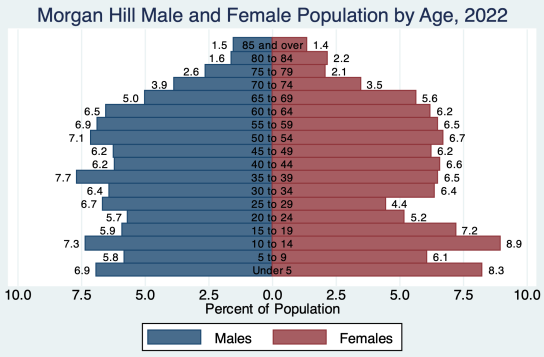
Source: CA, Department of Finance
Graph by: National Economic Education Delegation (www.NEEDEcon.org)

Figure 2: Population Growth (2)

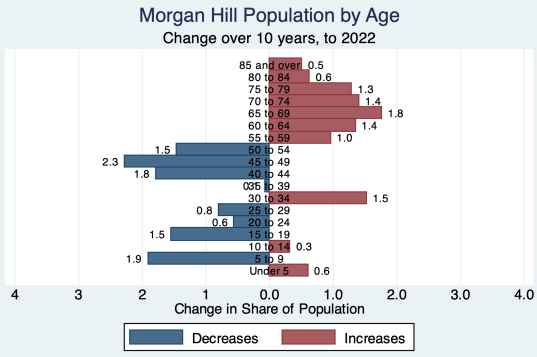


Source: U.S. Bureau of Economic Analysis
Graph by: National Economic Education Delegation (www.NEEDEcon.org)

Figure 3: Population by Age - Detailed Age Categories

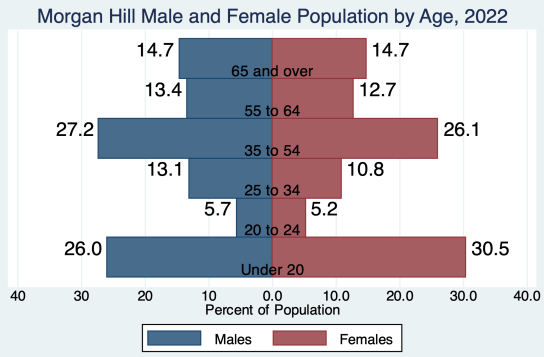


Source: U.S. Census Bureau, 5-yr American Community Survey
Graph by: National Economic Education Delegation (www.NEEDEcon.org)

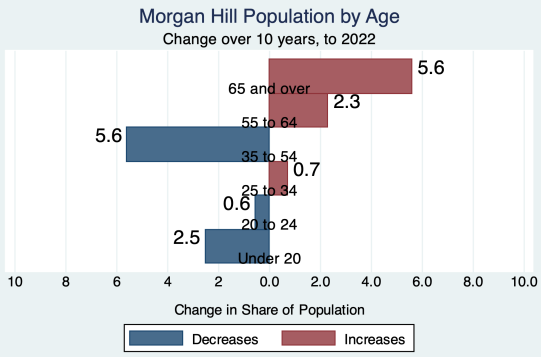


Source: U.S. Census Bureau, 5-yr American Community Survey
Graph by: National Economic Education Delegation (www.NEEDEcon.org)

Figure 4: Population by Age - Broad Age Categories



Source: U.S. Census Bureau, 5-yr American Community Survey
Graph by: National Economic Education Delegation (www.NEEDEcon.org)



Source: U.S. Census Bureau, 5-yr American Community Survey
Graph by: National Economic Education Delegation (www.NEEDEcon.org)

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Figure 5: Population by Educational Attainment

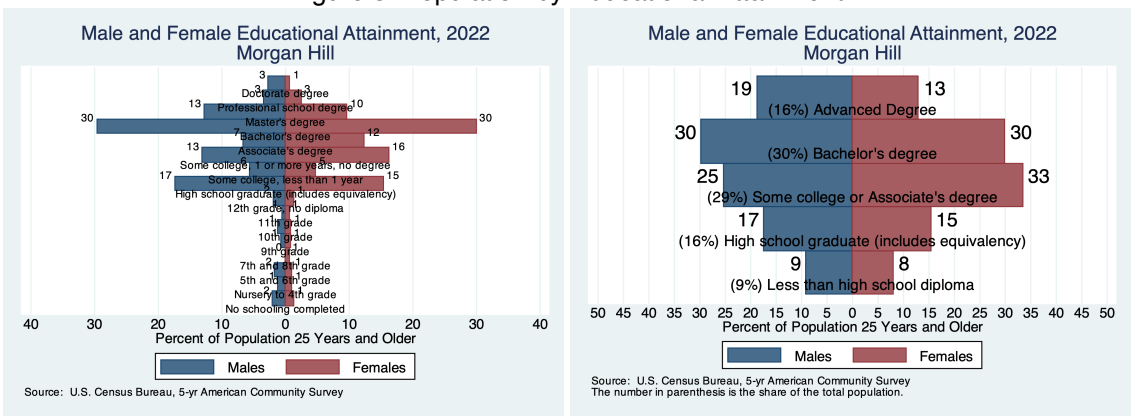


Figure 6: Population by Race/Ethnicity

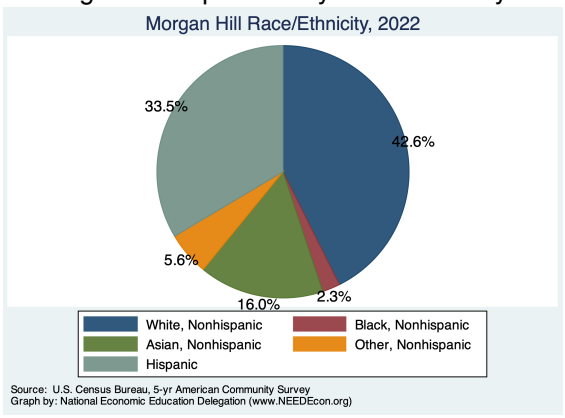
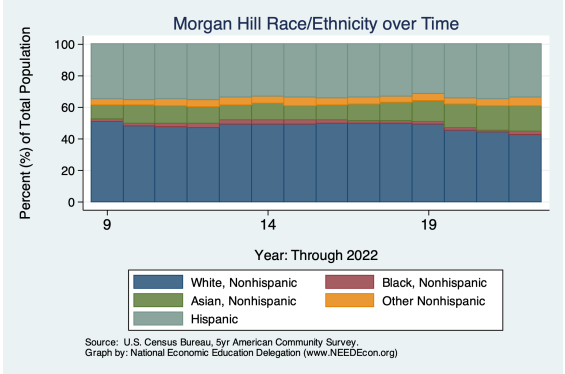


Figure 7: Population by Race/Ethnicity Over Time



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Employment Report

Citywide Employment and Unemployment

Definition:

Each month, California's Employment Development Division (EDD) publishes an update on employment in California and in MSAs, counties, and cities all across the state. The report focuses primarily on non-farm employment, providing estimates of changes in employment by industry as well as unemployment in each region. Data for cities is limited to aggregate employment, labor force, and unemployment data. Those are reported below.

Why is it important?

Employment growth is a fundamental indicator of the health of an economy.

Table 3. Morgan Hill Summary for March, 2024

Category	Current Value	Change From: Last Month	2 Months Ago	Last Year
Employment	8,924	-30	−53	-103
Labor Force	9,644	9	15	96
Number Unemployed	678	-4	21	97
Unemployment Rate	7.0	-0.0	0.2	0.9

Source: EDD, National Economic Education Delegation

Figure 8: Historical Employment and Unemployment

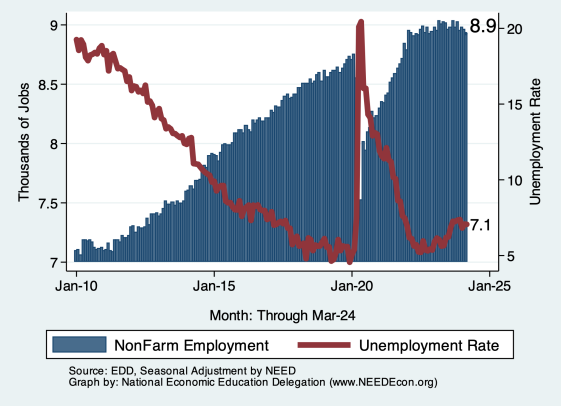


Figure 9: Employment and Unemployment - Last 12 Months

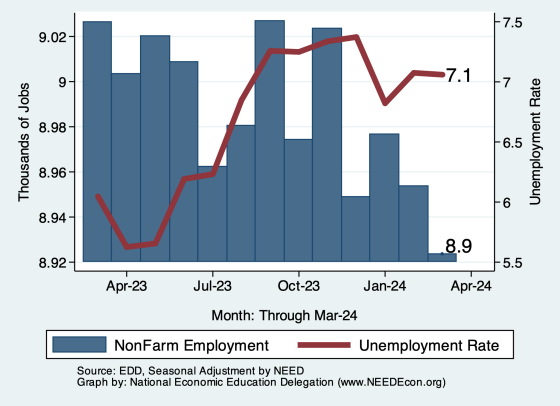


Figure 10: Relative Employment Growth Across Regions - since 2010

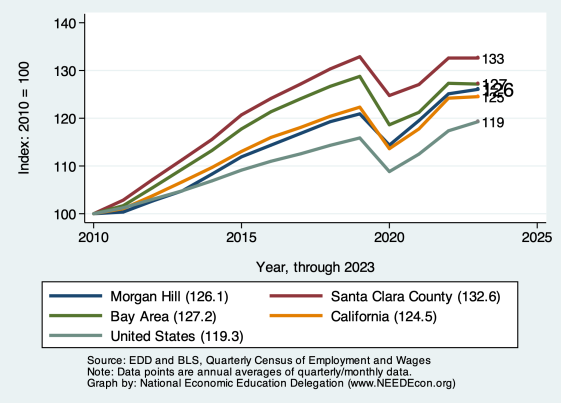
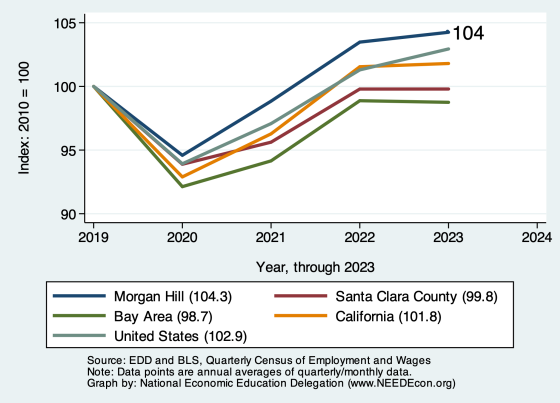


Figure 11: Relative Employment Growth Across Regions - since 2019



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County Employment by Industry

California's Employment Development Division (EDD) does not regularly produce data on employment by industry for cities. However, we are able to report indsutry-level employment data for Santa Clara County. The following table provides the latest data for the County.

Table 4. Employment Growth by Industry in Santa Clara County for March, 2024

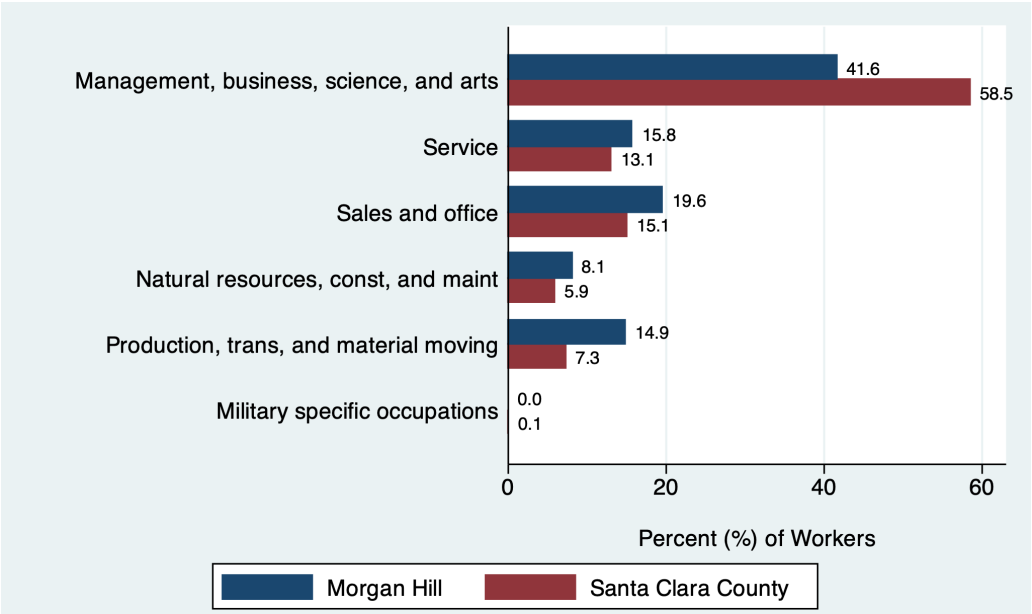
			Empl	% Growth - Annualized Rate					
Industry	**Employment**	**Share**	**Growth**	**Month**	**Qtr**	**6mo**	**1yr**	**3yr**	**5yr**
Total Nonfarm	1,160,919	100.0	3,973.9	4.2	1.6	1.5	0.2	3.0	0.5
Goods Producing	228,703	19.7	278.5	1.5	−4.9	−2.6	−2.1	2.6	0.7
Mining and Logging	200	0.0	0.0	0.0	0.0	0.0	100.0	33.3	0.0
Construction	53,354	4.6	517.3	12.4	−7.2	−4.8	−2.0	2.0	1.0
Manufacturing	174,825	15.1	−383.1	−2.6	−4.9	−2.1	−2.1	2.6	0.5
Durable Goods	167,204	14.4	−401.3	−2.8	−5.0	−2.3	−2.5	2.7	1.0
Non-Durable Goods	7,374	0.6	11.1	1.8	−2.3	0.9	4.3	1.3	−6.7
Service Providing	933,606	80.4	4,375.2	5.8	3.2	2.5	0.7	3.2	0.5
Trade, Trans & Utilities	118,031	10.2	204.7	2.1	−0.6	−1.4	−1.2	0.3	−1.8
Wholesale Trade	27,780	2.4	−2.5	−0.1	−2.6	−4.7	−3.5	−0.1	−2.4
Retail Trade	72,175	6.2	106.5	1.8	0.2	−0.1	0.1	−0.4	−2.6
Information	96,423	8.3	225.9	2.9	−10.1	−7.7	−7.4	−2.9	−0.1
Financial Activities	37,808	3.3	5.0	0.2	0.1	−1.0	−0.8	−0.2	0.6
Finance & Insurance	21,366	1.8	35.0	2.0	−0.0	−3.1	−1.8	−2.7	−0.2
Real Estate & Rental & Leasing	16,408	1.4	−34.9	−2.5	0.5	2.6	0.6	3.6	1.6
Professional & Business Srvcs	250,804	21.6	2,129.1	10.8	5.5	4.3	−0.2	1.4	0.9
Prof, Sci, & Tech	169,093	14.6	753.2	5.5	0.5	1.7	−1.9	0.8	0.8
Educational & Health Srvcs	204,231	17.6	1,015.2	6.2	6.9	6.3	6.1	6.0	3.2
Education Srvcs	50,684	4.4	58.2	1.4	3.6	3.6	4.0	6.5	0.7
Health Care & Social Assistance	152,533	13.1	1,088.1	9.0	6.5	7.8	6.9	5.5	3.8
Leisure & Hospitality	102,403	8.8	572.1	7.0	4.6	3.8	1.8	17.3	−0.4
Other Srvcs	24,284	2.1	261.2	13.9	−10.1	−3.0	−1.2	4.9	−3.1
Government	97,358	8.4	697.2	9.0	6.8	4.5	3.6	3.4	0.5
Federal	9,920	0.9	13.7	1.7	1.2	−0.5	−0.1	−1.3	0.4
State	6,856	0.6	25.0	4.5	6.8	1.4	1.3	2.3	0.5
Local	80,812	7.0	630.7	9.9	7.8	5.2	4.2	4.2	0.5

Source: EDD, National Economic Education Delegation (NEED)

Some Employee Detail

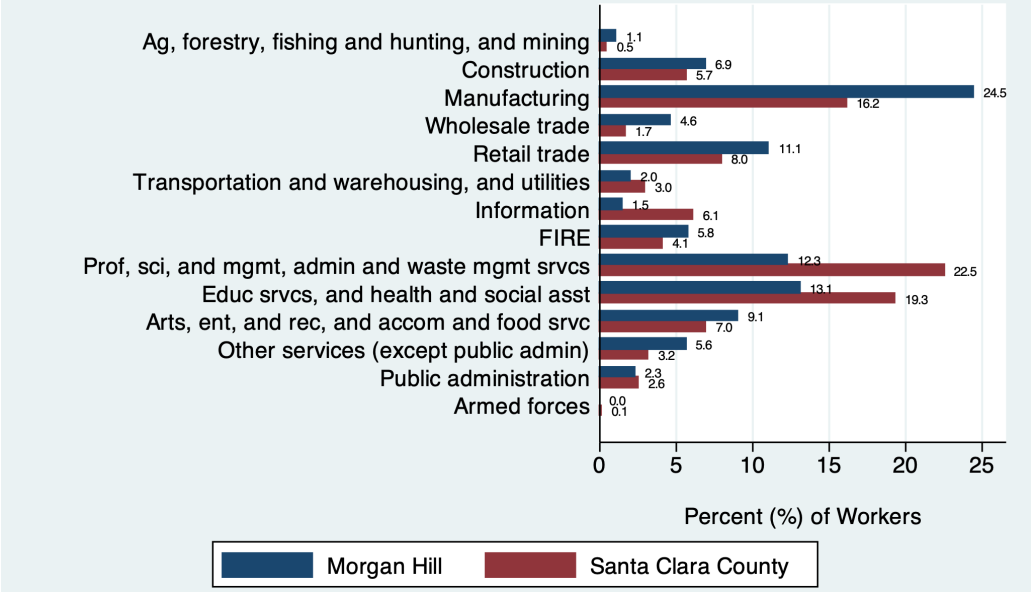
Employed in Morgan Hill

Figure 12: Employment by Occupation



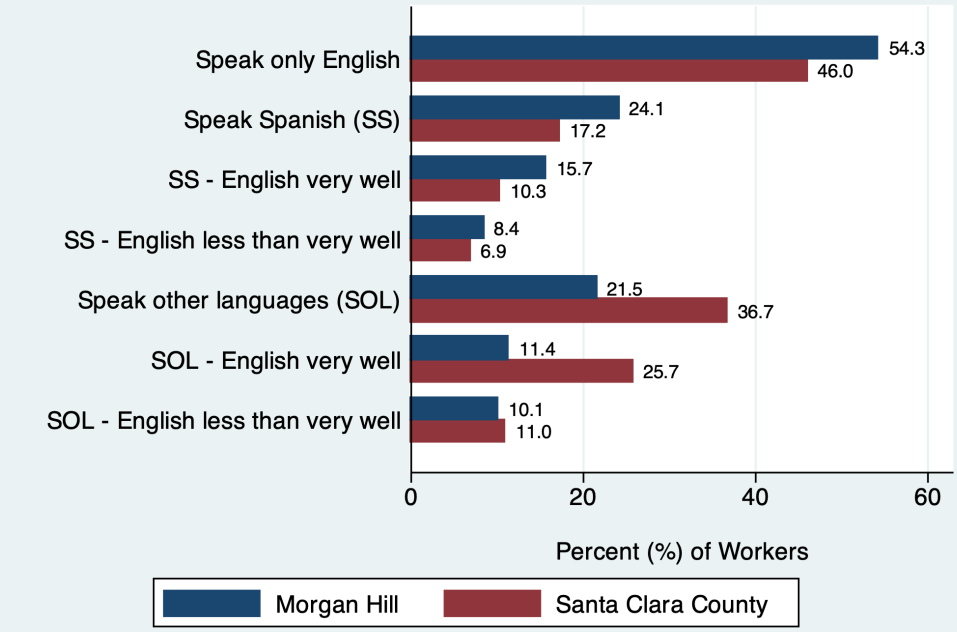
Source: American Community Survey, 2022 5-yr Summary Files.
Graph by: National Economic Education Delegation (www.NEEDEcon.org).

Figure 13: Employment by Industry



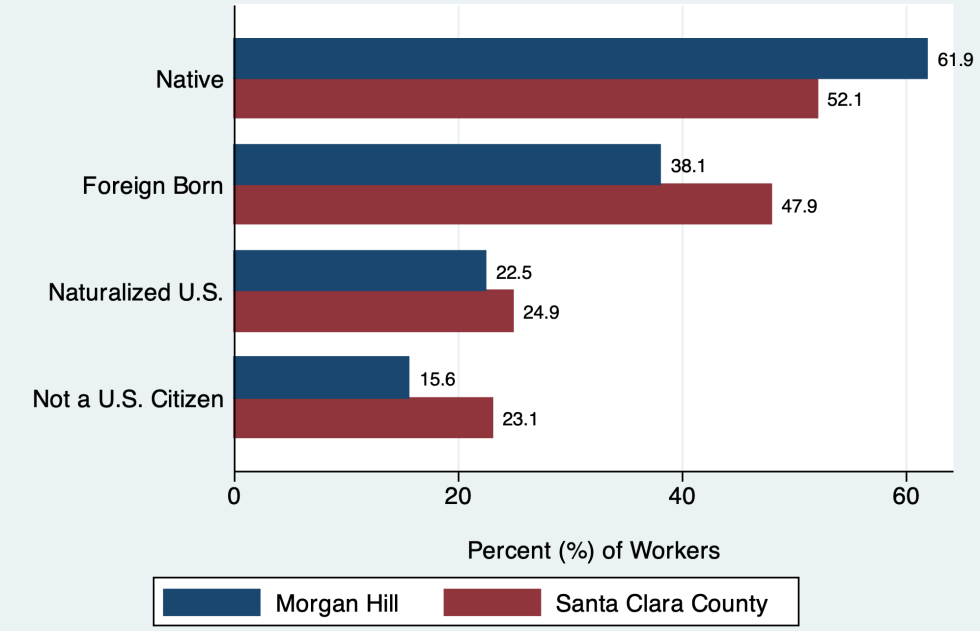
Source: American Community Survey, 2022 5-yr Summary Files.
Graph by: National Economic Education Delegation (www.NEEDEcon.org).

Figure 14: Language Spoken at Home



Source: American Community Survey, 2022 5-yr Summary Files.
Graph by: National Economic Education Delegation (www.NEEDEcon.org).

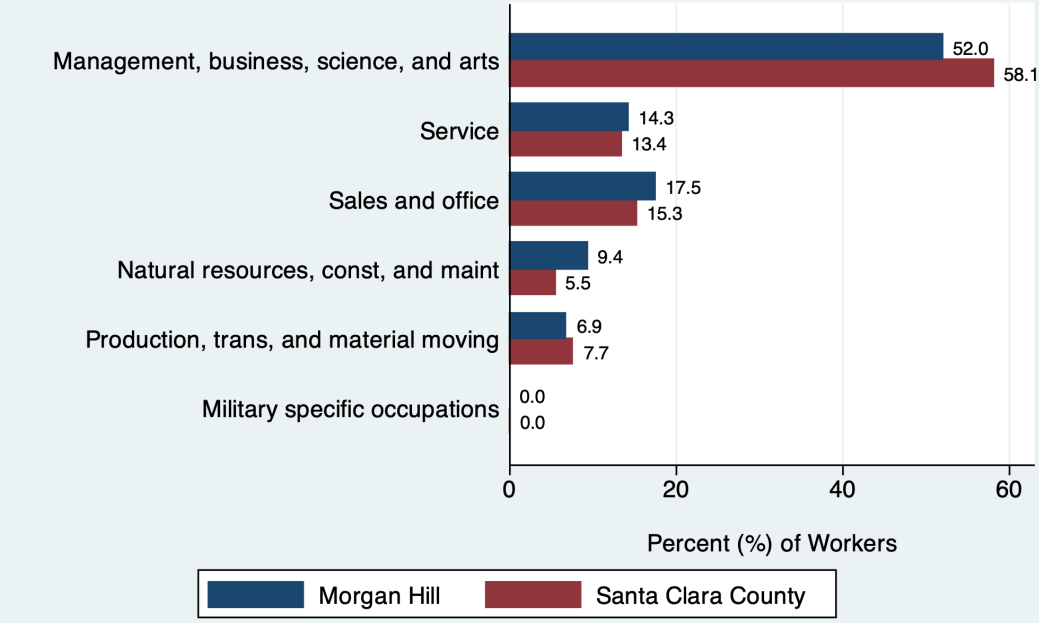
Figure 15: Citizenship



Source: American Community Survey, 2022 5-yr Summary Files.
Graph by: National Economic Education Delegation (www.NEEDEcon.org).

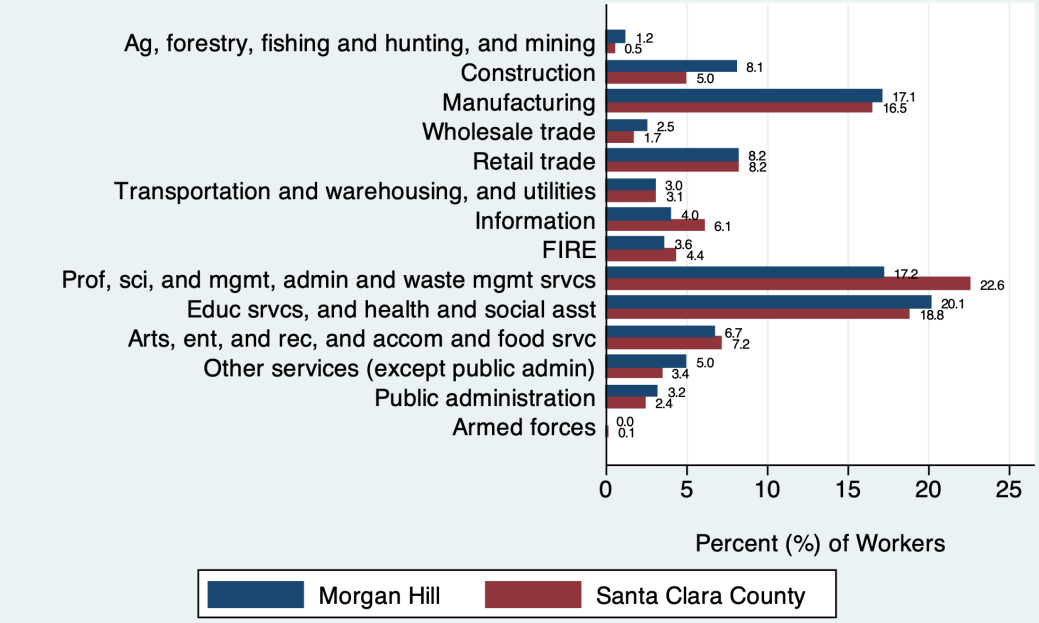
Employed Residents of Morgan Hill

Figure 16: Employment by Occupation



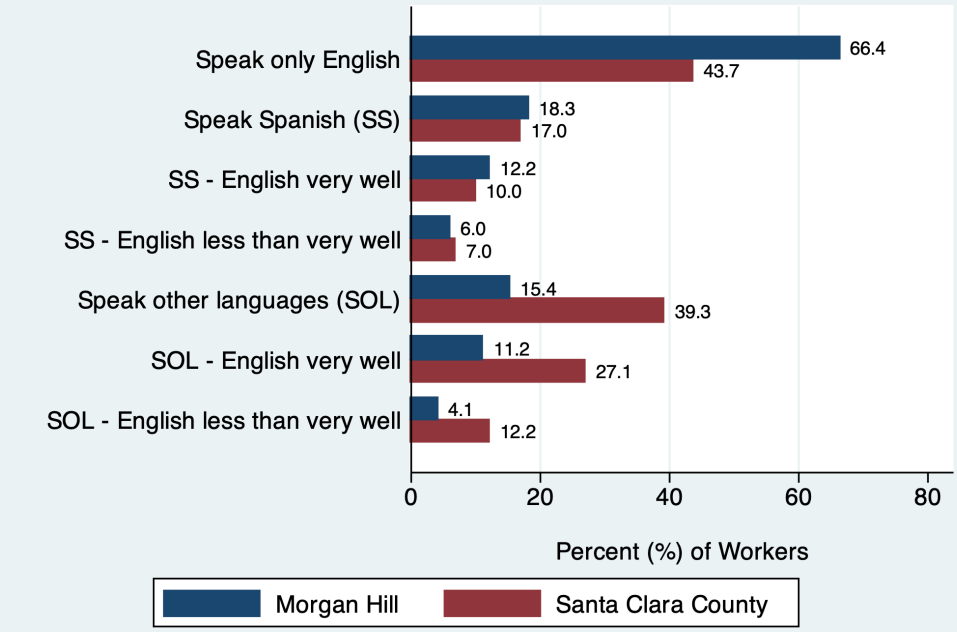
Source: American Community Survey, 2022 5-yr Summary Files.
Graph by: National Economic Education Delegation (www.NEEDEcon.org).

Figure 17: Employment by Industry



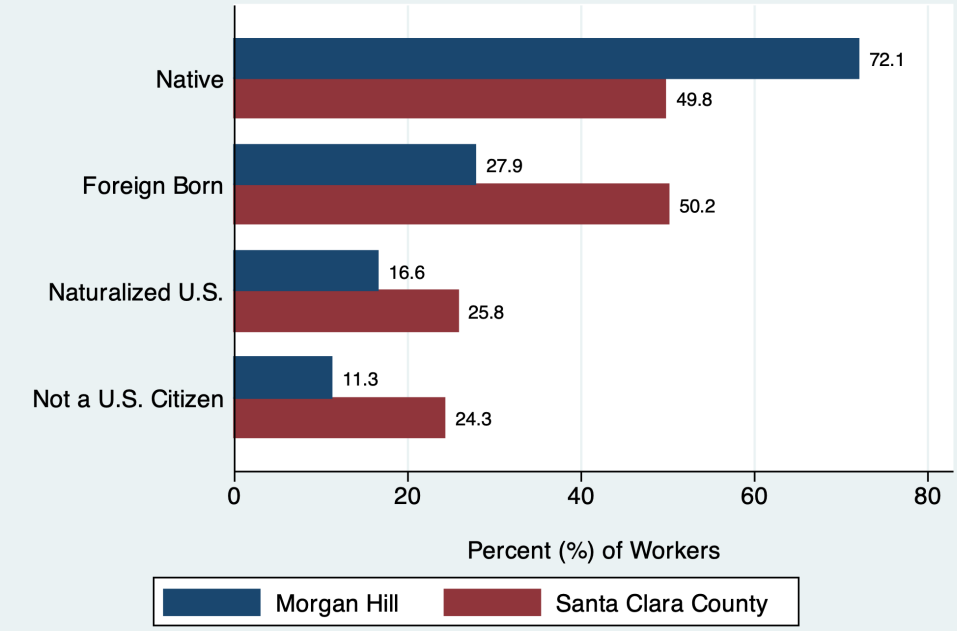
Source: American Community Survey, 2022 5-yr Summary Files.
Graph by: National Economic Education Delegation (www.NEEDEcon.org).

Figure 18: Language Spoken at Home



Source: American Community Survey, 2022 5-yr Summary Files.
Graph by: National Economic Education Delegation (www.NEEDEcon.org).

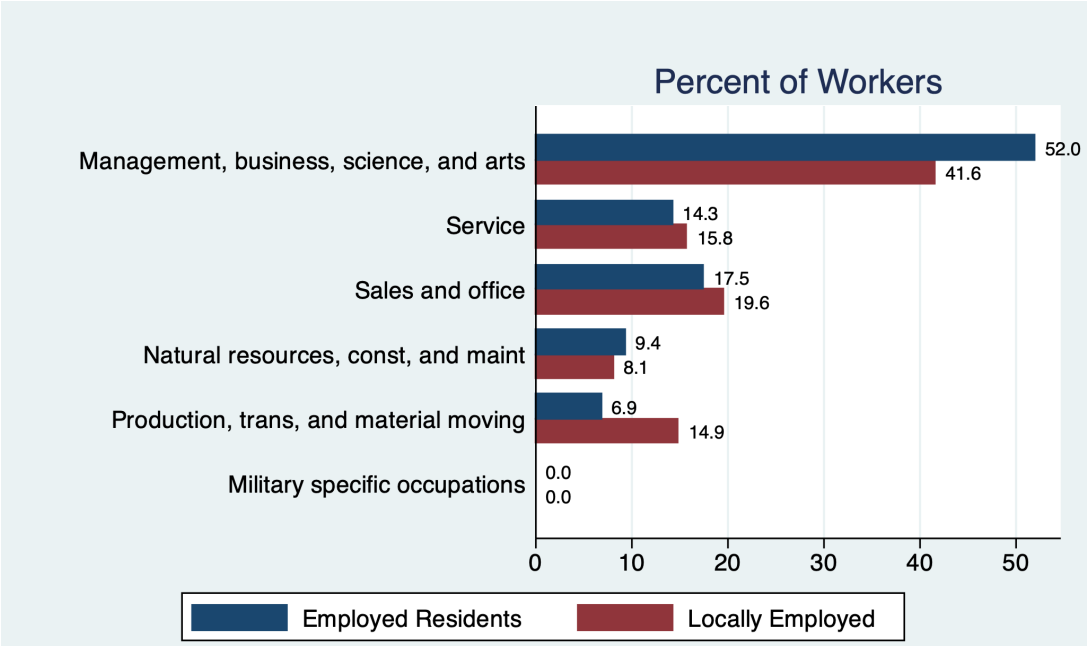
Figure 19: Citizenship



Source: American Community Survey, 2022 5-yr Summary Files.
Graph by: National Economic Education Delegation (www.NEEDEcon.org).

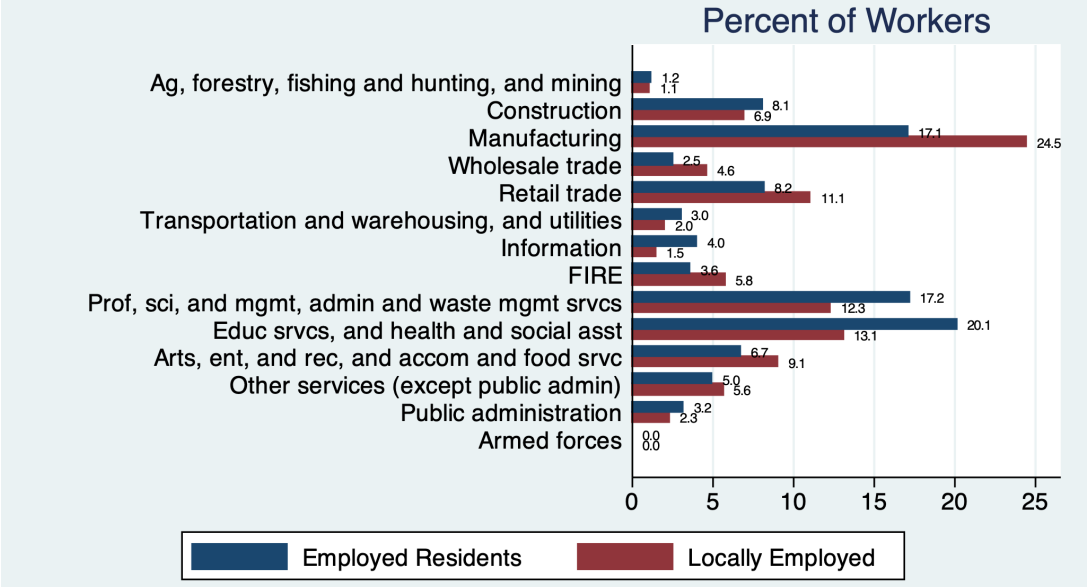
Employed Residents vs Workers in Morgan Hill

Figure 20: Employment by Occupation



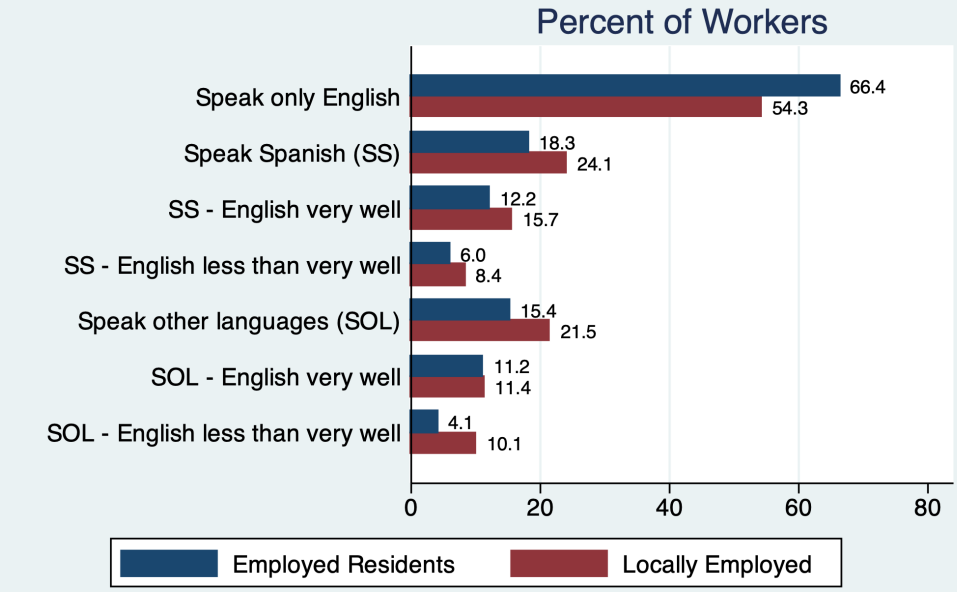
Source: American Community Survey, 2022 5-yr Summary Files.
Graph by: National Economic Education Delegation (www.NEEDEcon.org).

Figure 21: Employment by Industry



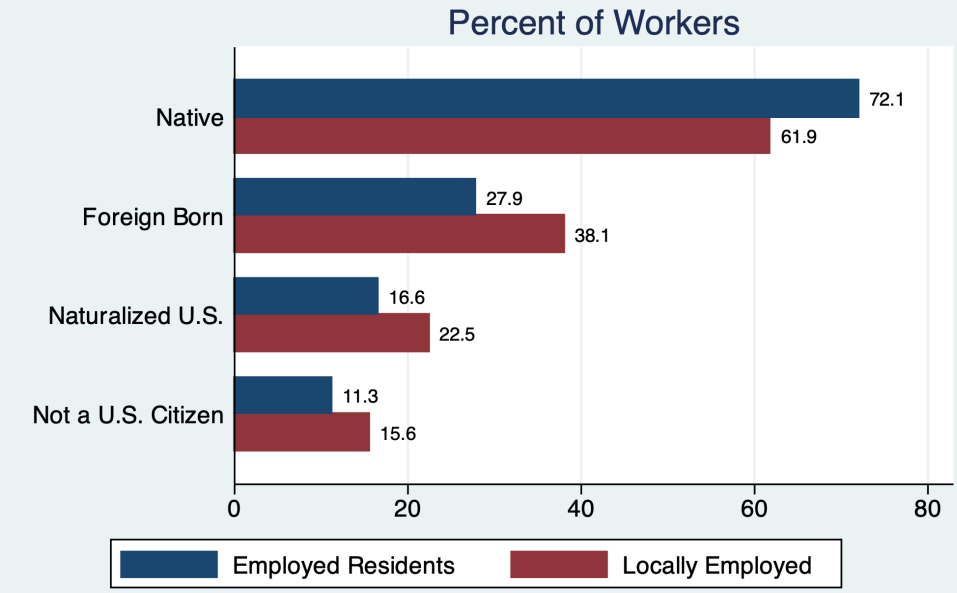
Source: American Community Survey, 2022 5-yr Summary Files.
Graph by: National Economic Education Delegation (www.NEEDEcon.org).

Figure 22: Language Spoken at Home



Source: American Community Survey, 2022 5-yr Summary Files.
Graph by: National Economic Education Delegation (www.NEEDEcon.org).

Figure 23: Citizenship



Source: American Community Survey, 2022 5-yr Summary Files.
Graph by: National Economic Education Delegation (www.NEEDEcon.org).

Income and Earnings

Per Capita Income Growth

Definition:

Per capita income is the average income per person in Morgan Hill. Personal income is the income received by, or on behalf of, all persons from all sources: from participation as laborers in production, from owning a home or unincorporated business, from the ownership of financial assets, and from government and business in the form of transfer receipts. Noncash government benefits are not included.

Why is it important?

Income is the money that is available to persons for consumption expenditures, taxes, interest payments, transfer payments to governments and the rest of the world, or for saving. As such, it is an important indicator of economic well-being in a community.

Figure 24: Real Per Capita Income Ranking Among California Cities

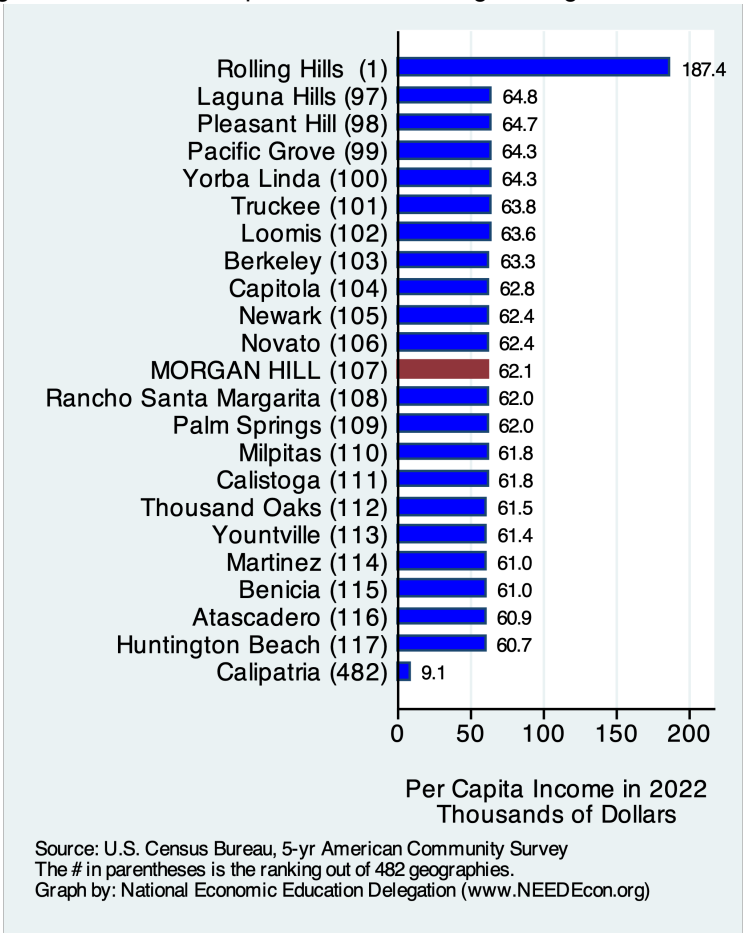
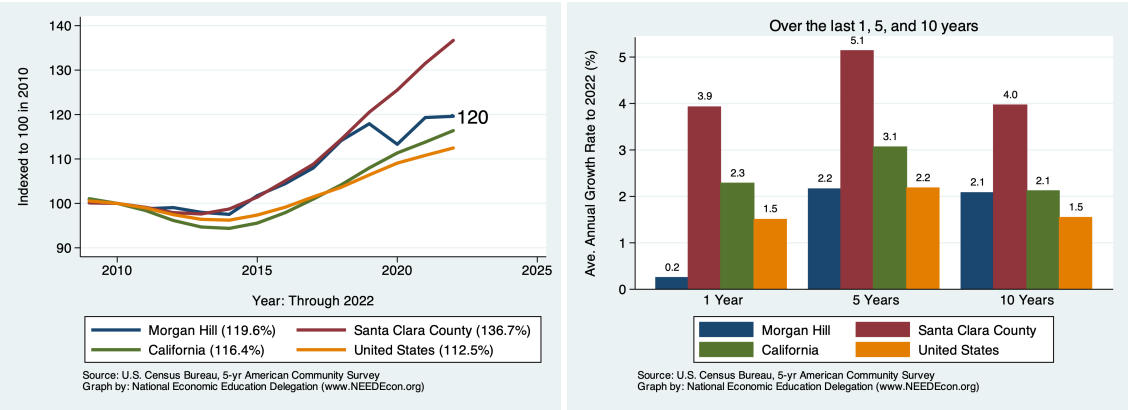


Figure 25: Regional Comparison of Growth over Time



Real Per Capita Income Ranking Among California Cities - w/Comparable Populations

Figure 26: Income Levels

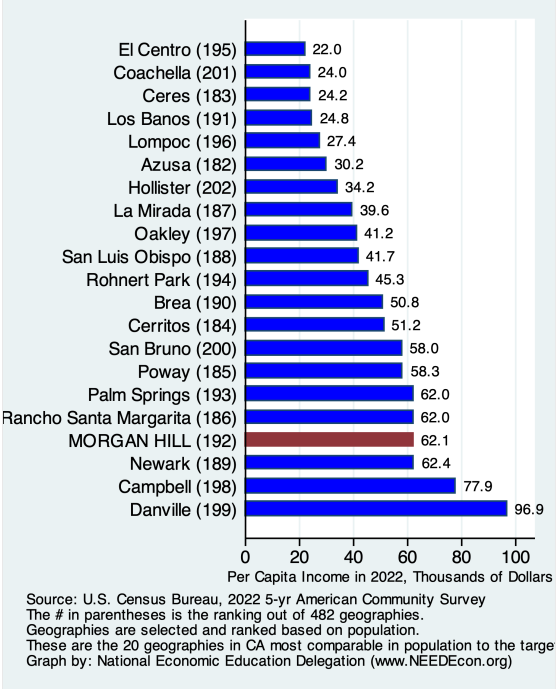
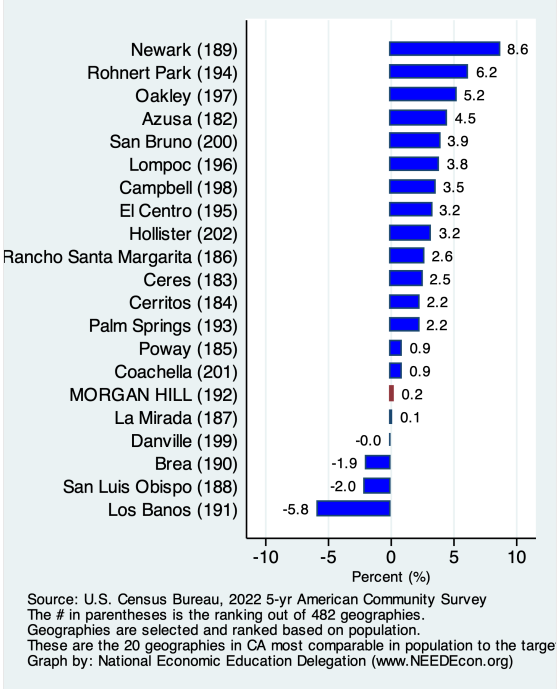


Figure 27: Growth over Time



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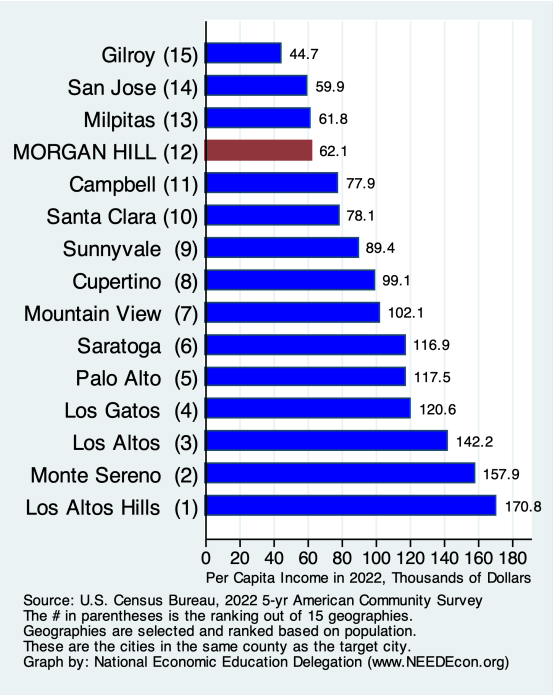
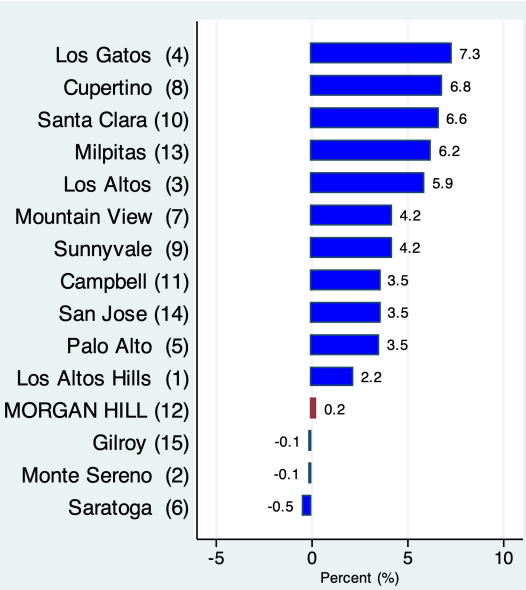
Real Per Capita Income Ranking Among Cities in Santa Clara County

Figure 28: Income Levels



Source: U.S. Census Bureau, 2022 5-yr American Community Survey
The # in parentheses is the ranking out of 15 geographies.
Geographies are selected and ranked based on population.
These are the cities in the same county as the target city.
Graph by: National Economic Education Delegation (www.NEEDEcon.org)

Figure 29: Growth over Time



Source: U.S. Census Bureau, 2022 5-yr American Community Survey
The # in parentheses is the ranking out of 15 geographies.
Geographies are selected and ranked based on population.
These are the cities in the same county as the target city.
Graph by: National Economic Education Delegation (www.NEEDEcon.org)

Figure 30: Comparison with All Cities Nationwide

Source: U.S. Census Bureau, 5-yr American Community Survey
The # in parentheses is the ranking out of 19,695 geographies.
Graph by: National Economic Education Delegation (www.NEEDEcon.org)

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Poverty and Inequality

Definition:

The local poverty rate provides an indication of the well-being of those at the bottom of the income distribution. The federal poverty rate measures the proportion of households in the region that are classified as living in poverty. Also included are measures of the extent to which the City's children are impoverished. Measures of the income distribution provide further evidence on disparities in income in the region and how those disparities have changed over time.

Why is it important?

It is important to track measures of poverty and inequality to assess the extent of income disparities in the region, with an eye toward understanding how well the local economy is performing for all of its citizens.

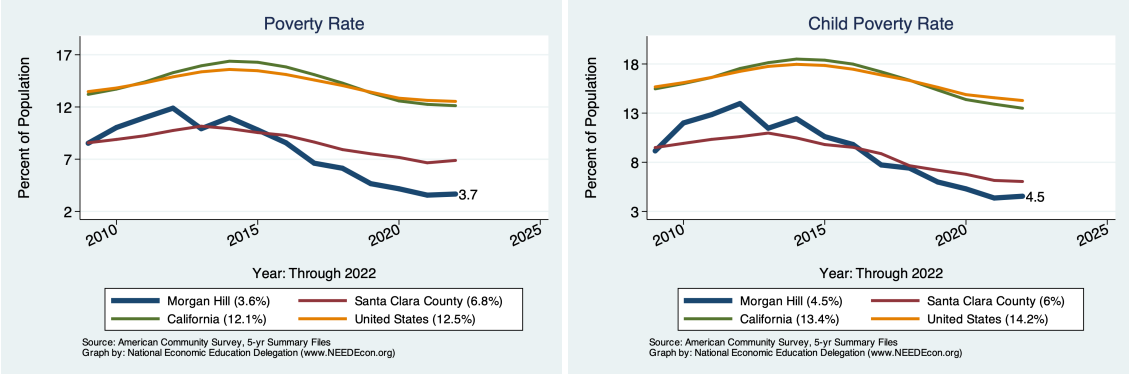

Figure 31: Inequality

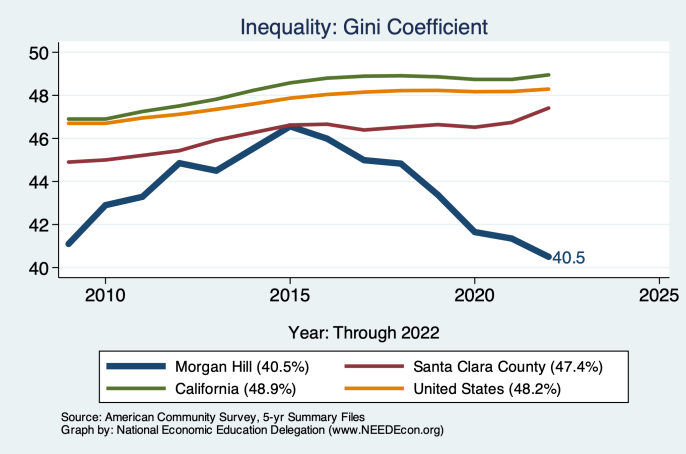

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Figure 32: Shares Across the Income Distribution

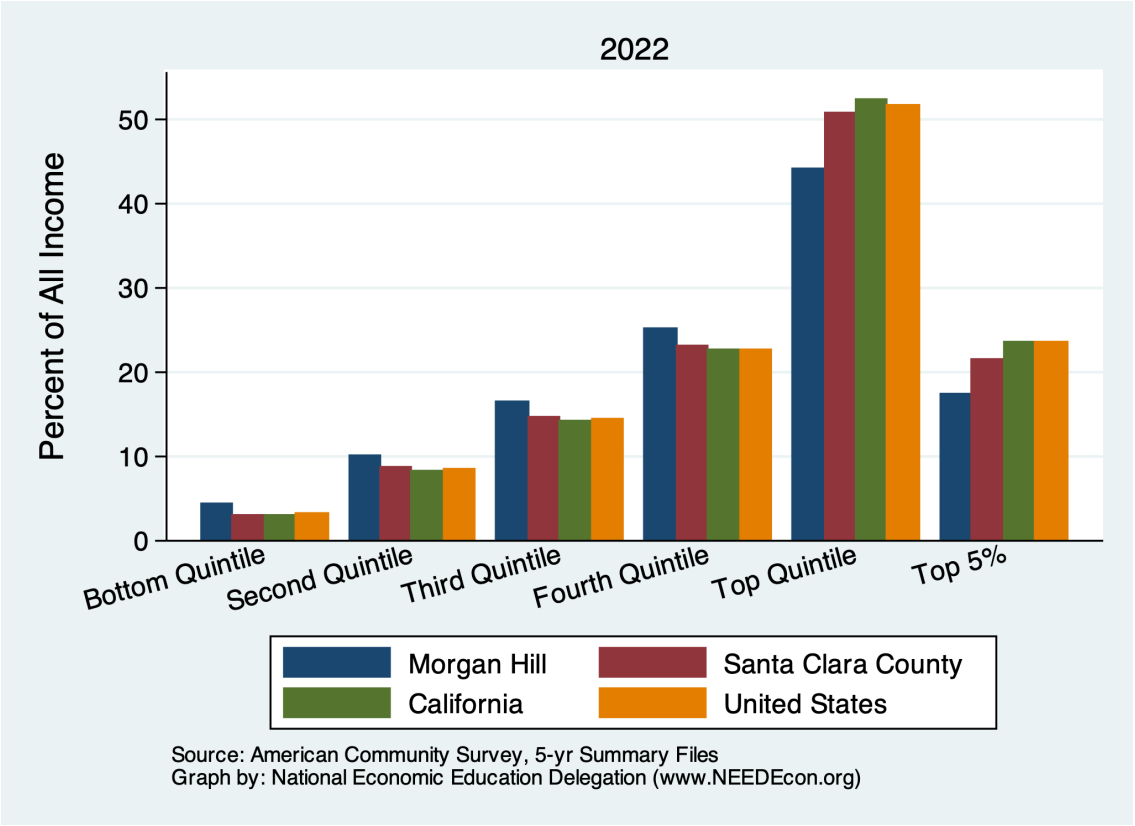
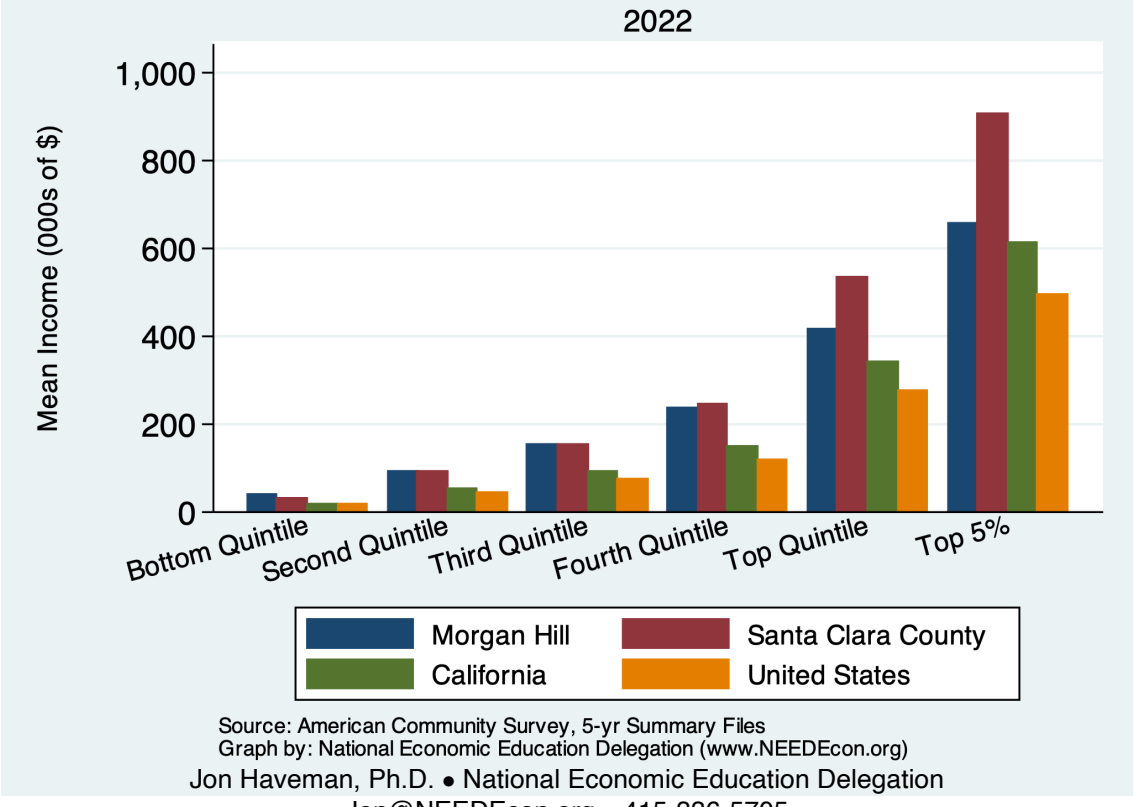


Figure 33: Means Across the Income Distribution



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Housing

Housing Costs and Affordability

Definition:

Housing costs are measured in several different ways. First, we provide evidence on the evolution of median home prices, median rental price, and finally through evidence on the housing burden in the city and comparison regions. Housing burden is defined as a household needing to commit more than 30% of their household income toward housing costs. The median value is the amount in the middle. Fifty percent of units are above the median and 50 percent are below.

Why is it important?

Housing is one of three fundamental necessities, along with food and clothing. A measure of the cost of housing is an integral part of the measurement of the cost of living in a specific community. This is particularly true in cities and regions throughout the Bay Area, where housing costs are high relative to income.

Cost of Housing in Morgan Hill and Broader Regions

Figure 34: Median Home Prices

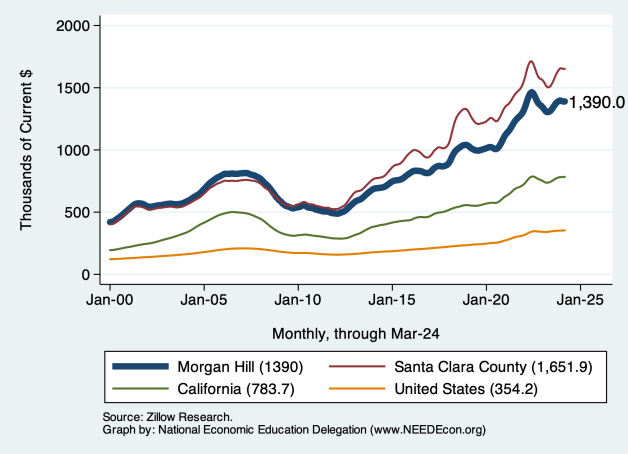
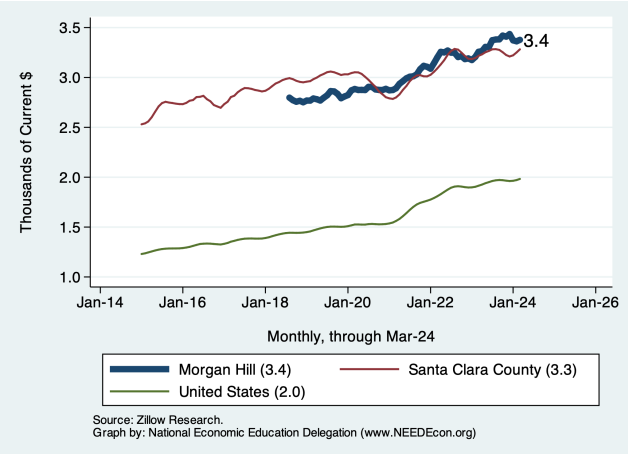


Figure 35: Median Rents



Housing Ownership in Morgan Hill and Broader Regions

Figure 36: Home Ownership Rates

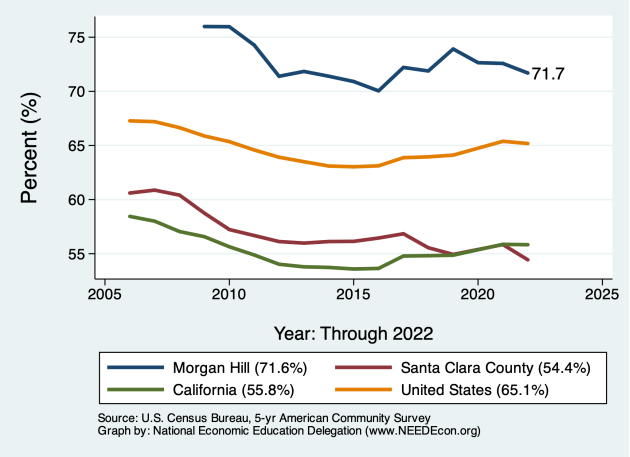


Figure 37: Home Ownership by Age

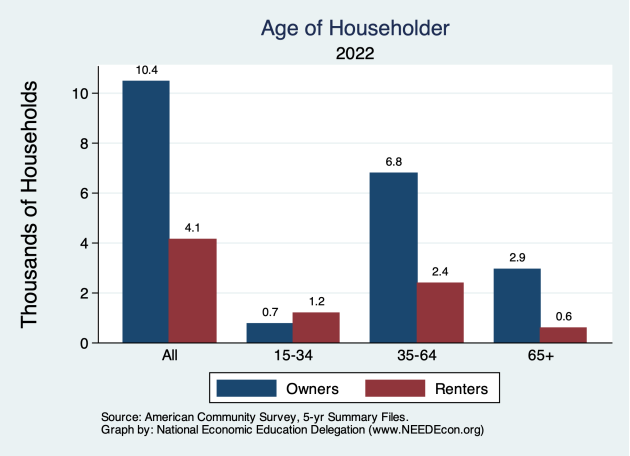


Figure 38: Income by Tenure

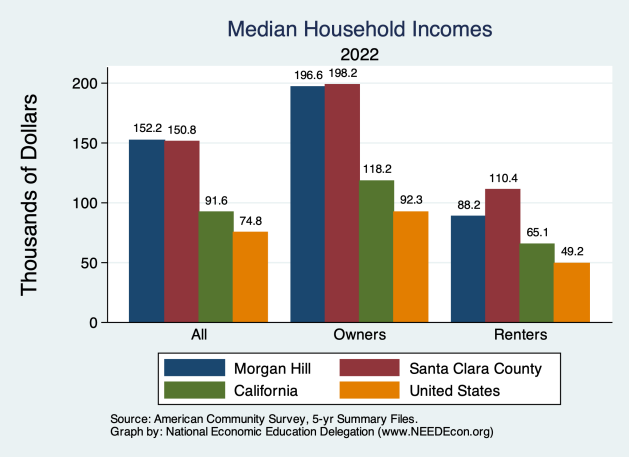


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Figure 39: Income Distribution by Tenure

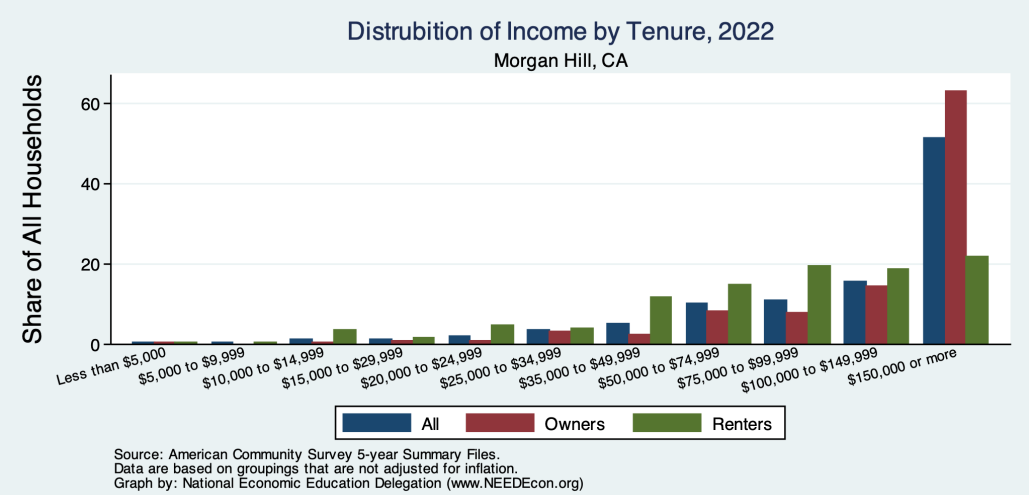


Figure 40: Income Distribution of Home Owners

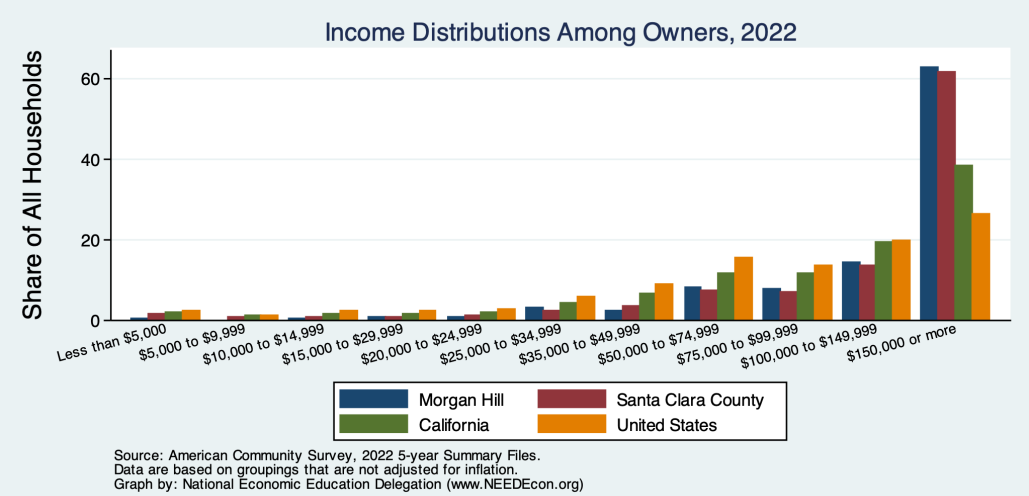
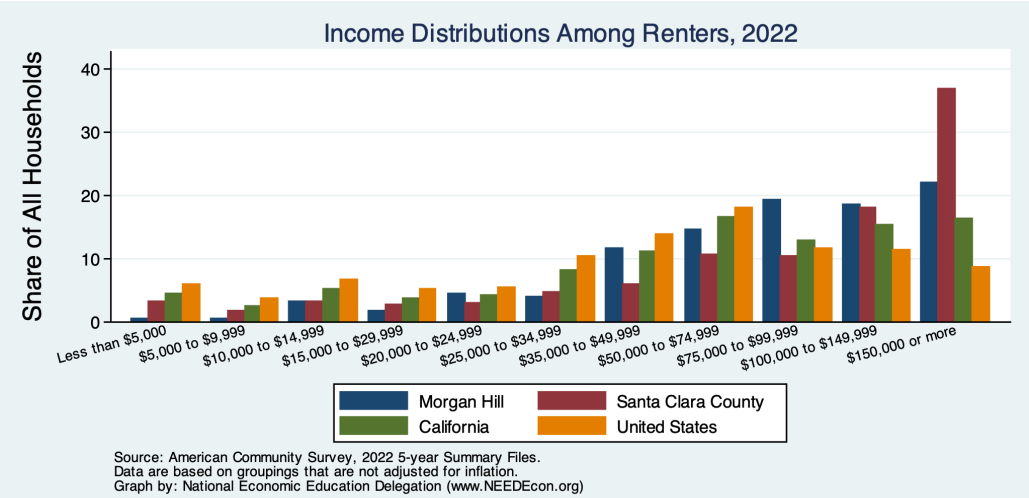


Figure 41: Income Distribution of Renters



Housing Burden in Morgan Hill and Broader Regions

Figure 42: Home Owners w/ A Mortgage

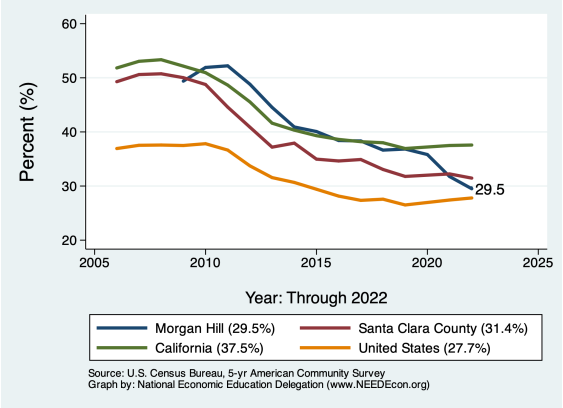


Figure 43: Home Owners w/o A Mortgage

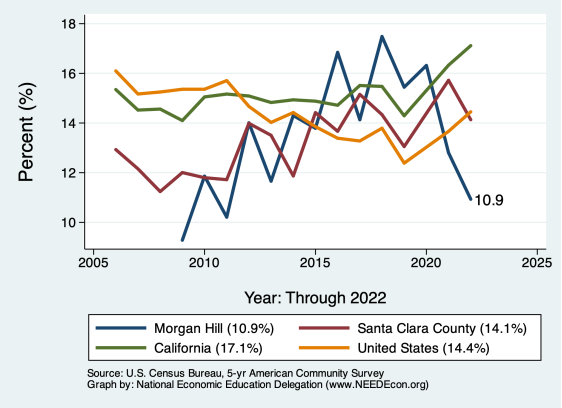


Figure 44: Renters

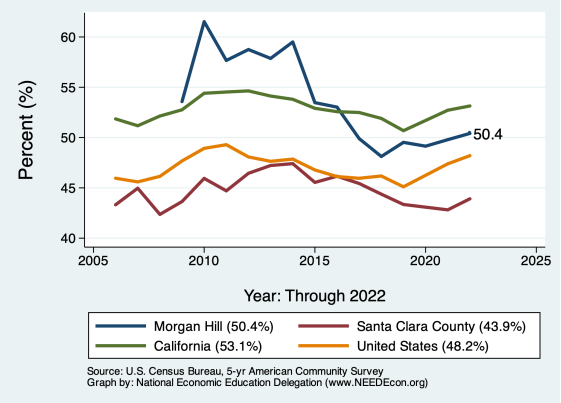
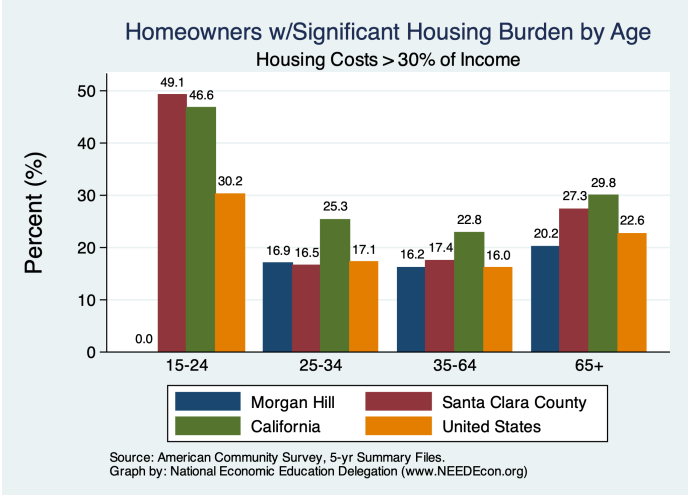


Figure 45: Homeowner Housing Burden by Age



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Housing Picture

Definition:

Housing costs are measured in several different ways. First, we provide evidence on the evolution of median home prices, median rental price, and finally through evidence on the housing burden in the city and comparison regions. The median value is the amount in the middle. Fifty percent of units are above the median and 50 percent are below.

Why is it important?

In areas where the rate of population growth exceeds the rate of housing growth, this is likely to reflect a tightening housing market. A tightening housing market will also likely be reflected in lower vacancy rates and higher occupancy rates. It may also be reflected in higher numbers of people per household.

Table 5. Housing Market Indicators

Indicator	2023	2019	2010	% Change from 2019	% Change from 2010
Total Population	45,892.0	45,745.0	37,882.0	0.3	21.1
Total # of Homes	16,178.0	15,105.0	12,859.0	7.1	25.8
# Occupied Units	15,697.0	14,454.0	12,326.0	8.6	27.3
Persons per Household	2.9	3.1	3.0	-7.7	-4.8
Vacancy Rate (%)	3.0	4.3	4.1	-31.0	-28.3

Source: CA DOF; Calculations by the National Economic Education Delegation

Figure 46: Housing Growth

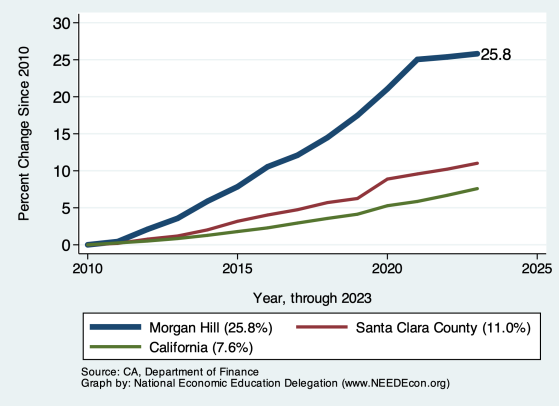


Figure 47: Persons per Household

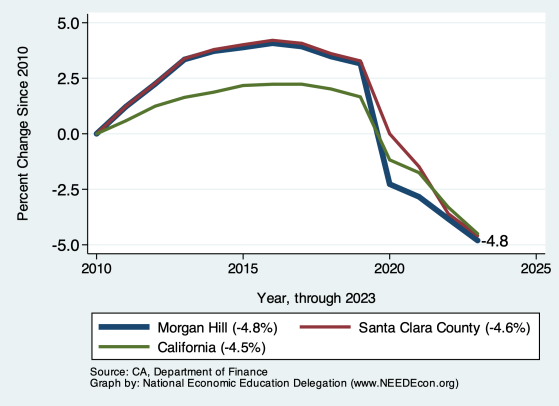


Figure 48: Vacancy Rates

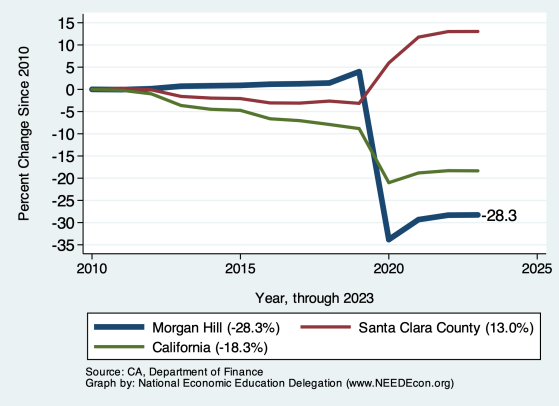
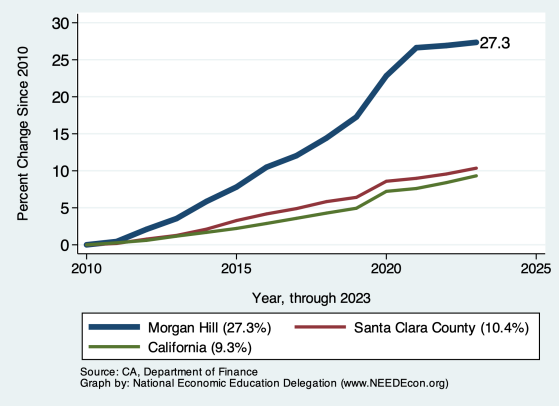


Figure 49: Number of Occupanied Units



Trends in the Growth of Housing by Housing Type

Figure 50: Single Detached Homes

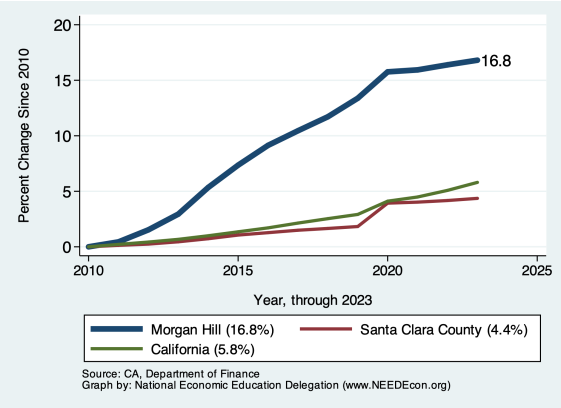


Figure 51: Single Attached Homes

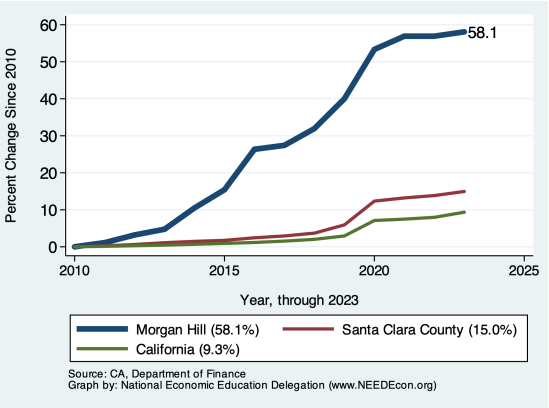


Figure 52: Housing in Buildings with Two to Four Units

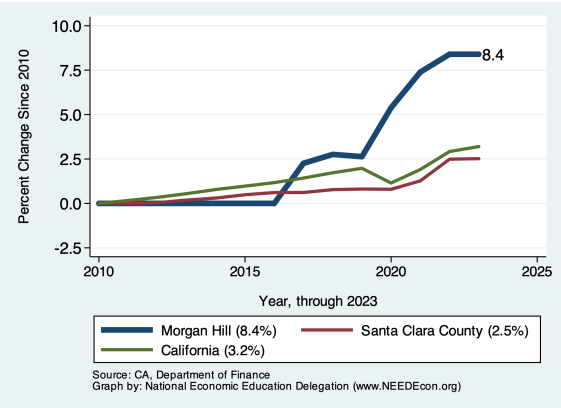
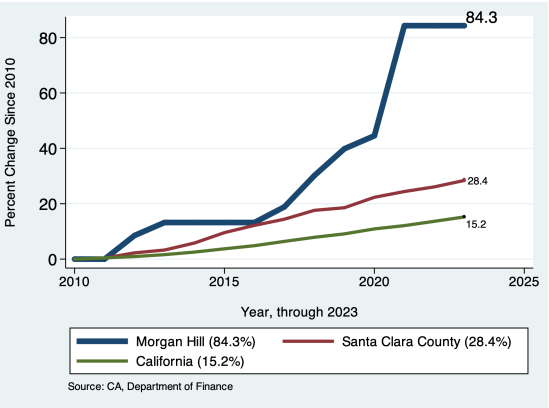


Figure 53: Housing in Buildings with Five or More Units



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Vintage of Residential Housing

Why is it important?

This section provides evidence on the year in which residential housing in Morgan Hill was built. We break it down into owned versus rented residences and provide a comparison across Santa Clara County and broader regions. A sense of the age of housing in a region provides an indication of the urgency with which a region might pursue additional housing. As the housing stock ages, an urgency with which renovations and rebuilds are permitted might result. All things equal, more recently constructed housing will be more likely to meet current codes and standards. Remodeling of existing units will be more desirable when existing units are, on average, older.

Figure 54: Distribution of Housing Construction

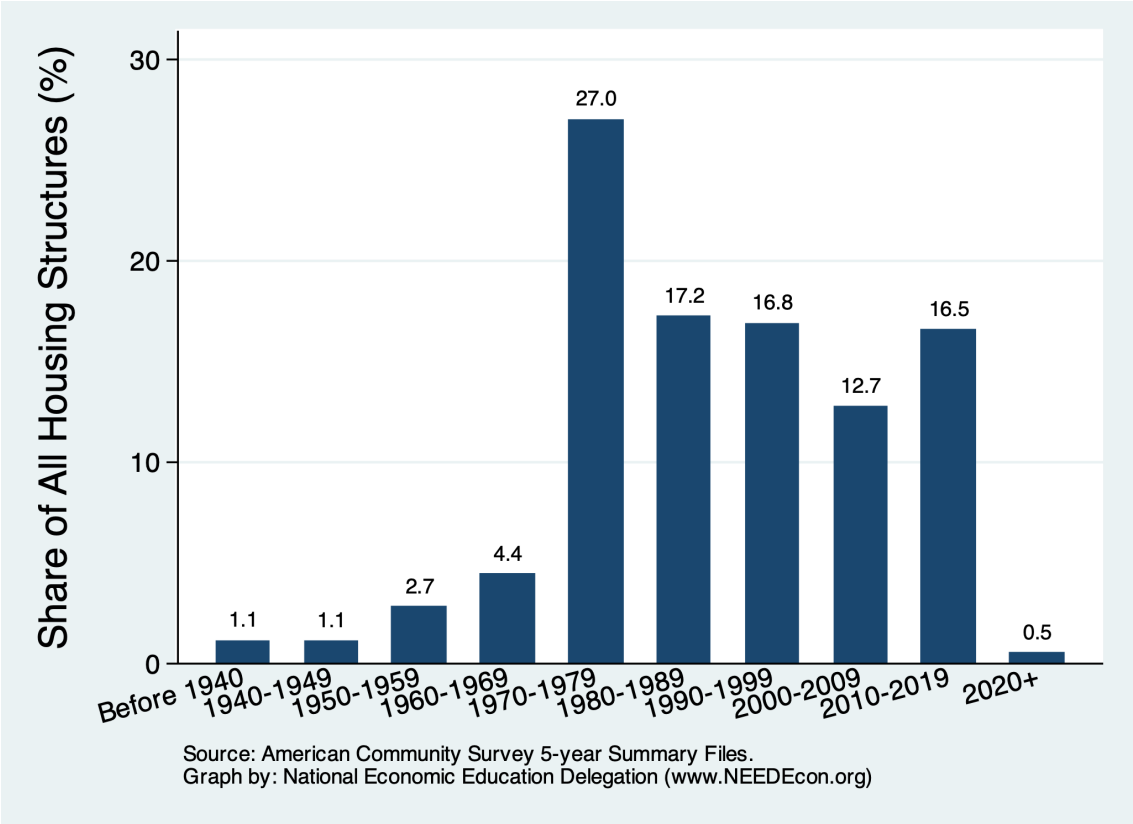


Figure 55: Housing Vintage across Regions

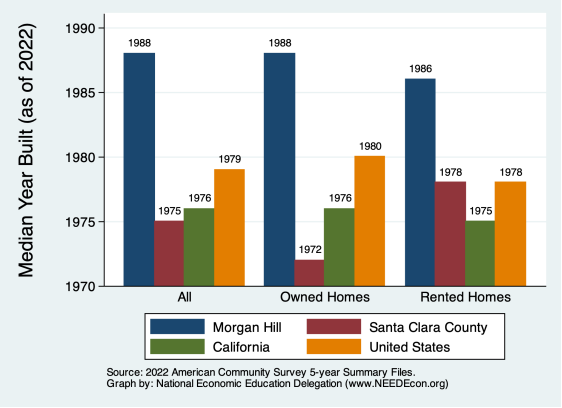


Figure 56: Housing Vintage by Tenure

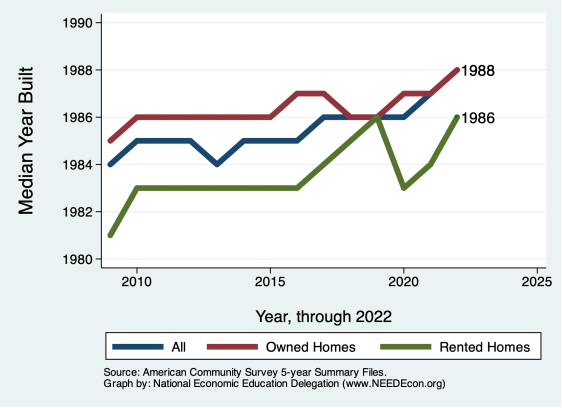


Figure 57: Vintage of Owned Residences

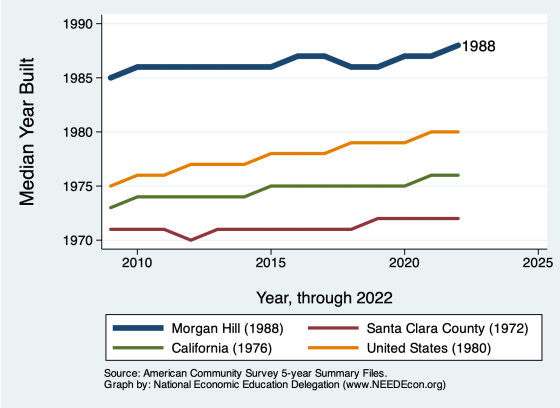


Figure 58: Vintage of Rented Residences

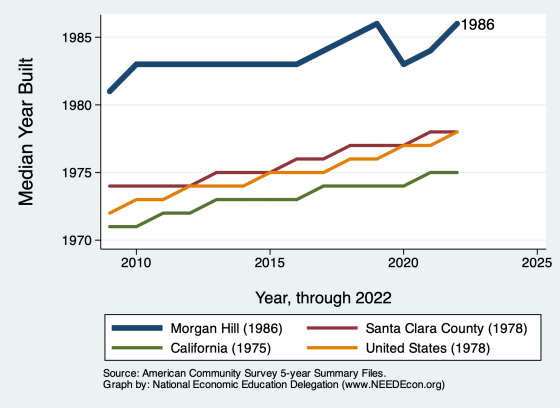
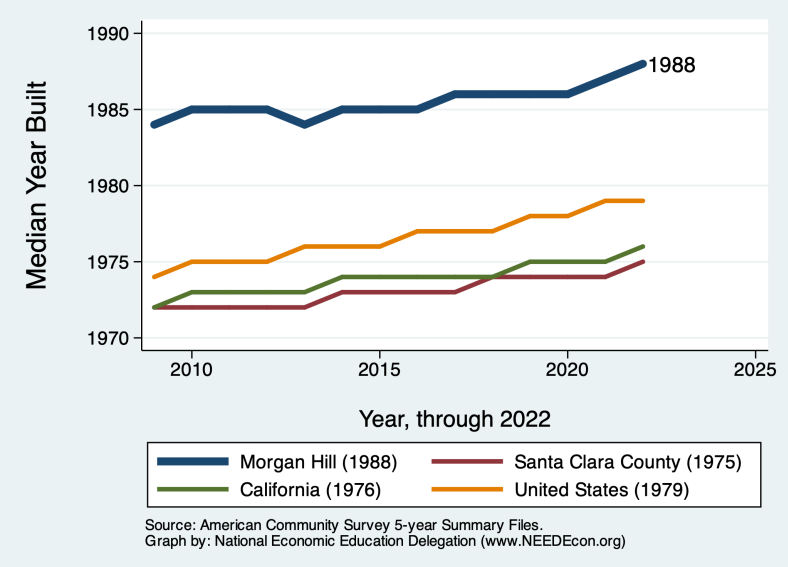


Figure 59: Vintage of All Residences



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Occupation of Residential Housing

Why is it important?

The duration of residence in a city is important for developing future policies regarding growing the local population. If a region is highly mobile, evidenced by most residences having been recently occupied, a city might propose policies to reduce that mobility, or ask why the mobility happens. Policies could be put in place to either reduce or increase migration.

Figure 60: Year Current Occupant Moved In

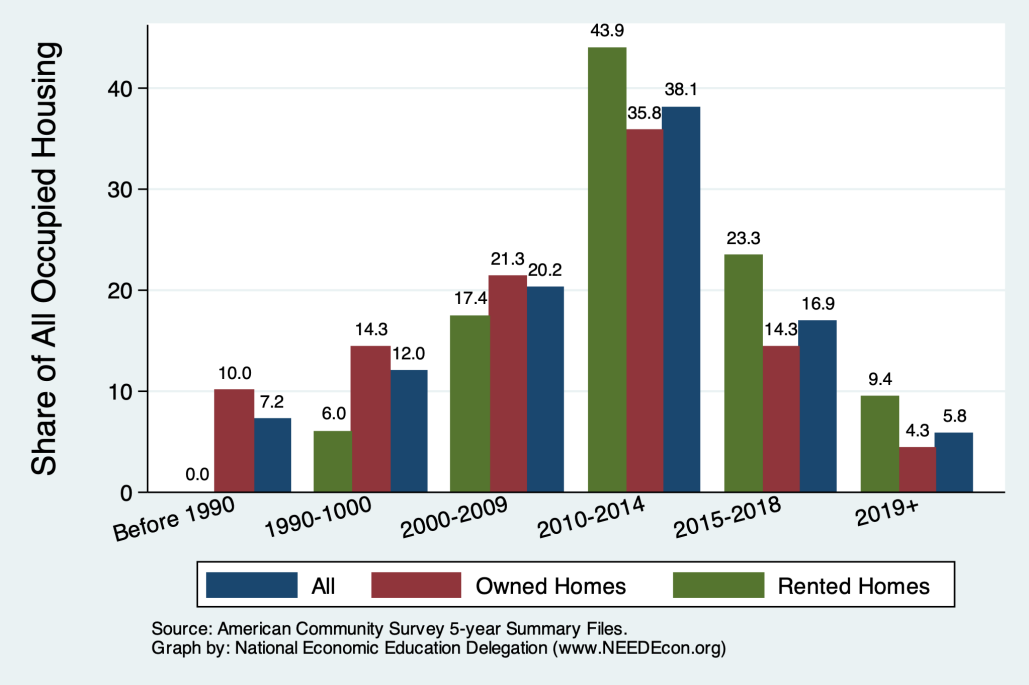

Figure 61: Year Occupied by Current Residents across Regions

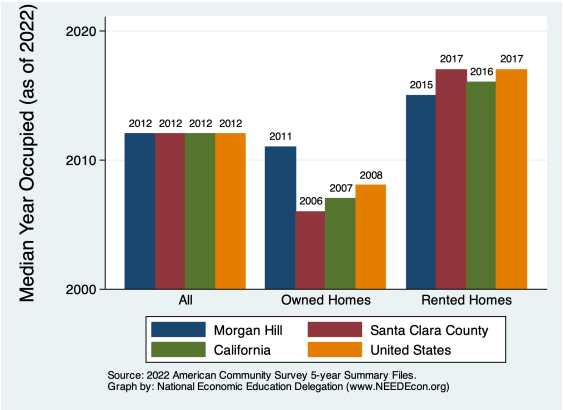

Figure 62: Year Occupied by Current Residents by Tenure

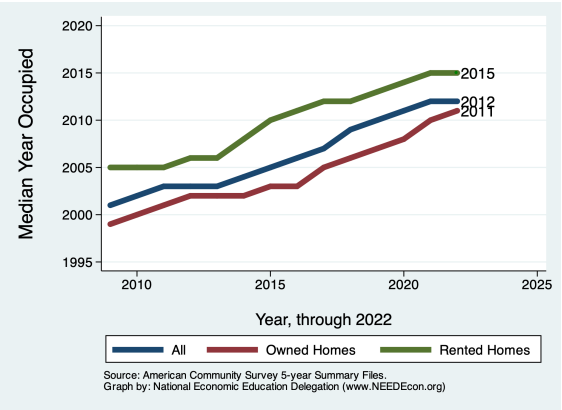

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Figure 63: Year Occupied by Current Residents for Owned Housing

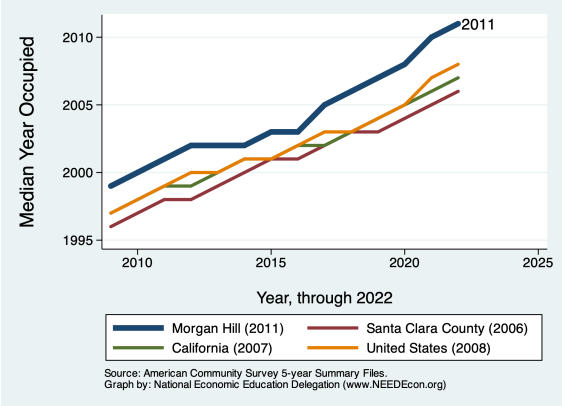


Figure 64: Year Occupied by Current Residents for Rented Housing

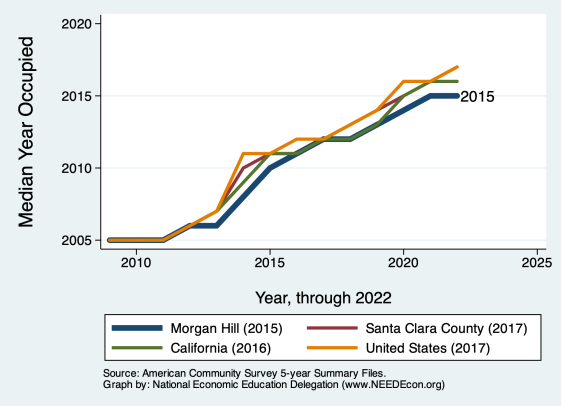
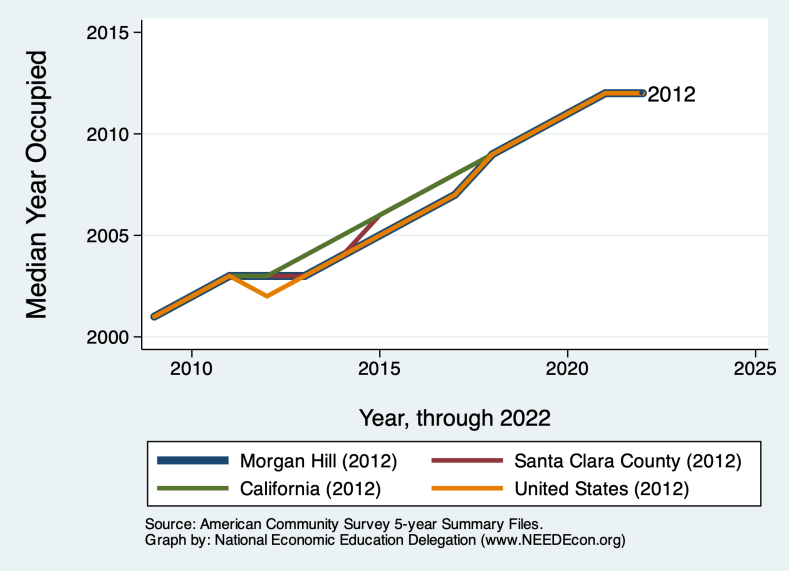


Figure 65: Year Occupied by Current Residents for All Housing



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Residential Permitting

Definition:

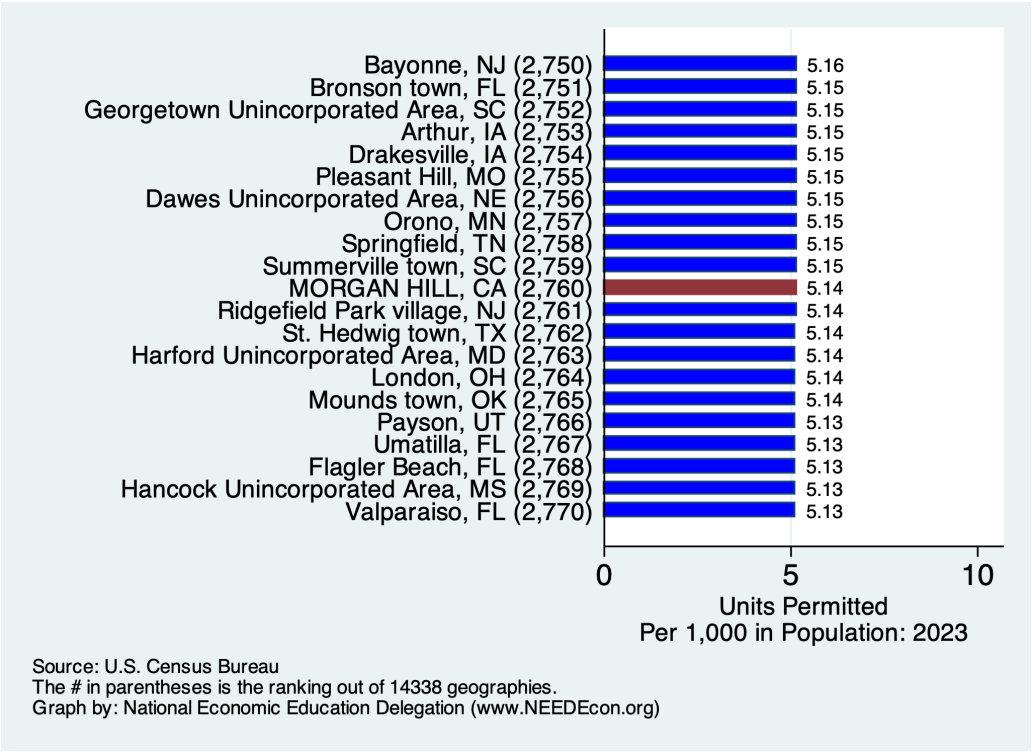
This indicator provides evidence on the number of residential buildings that are permitted for construction each year. Permit data for Morgan Hill is compared with data from Santa Clara County as a whole and broader regions. The statistic provided scales the number of permits by population. This is done to facilitate comparisons across regions.

Why is it important?

Building permits are the best indicator available of new units coming on the market. In order for a region's population to grow and flourish, new residential properties must be added to the existing stock. Building, both in the City and in the County more generally, is an indication of the extent to which new residences accommodate new residents or are affecting prices through increased supply.

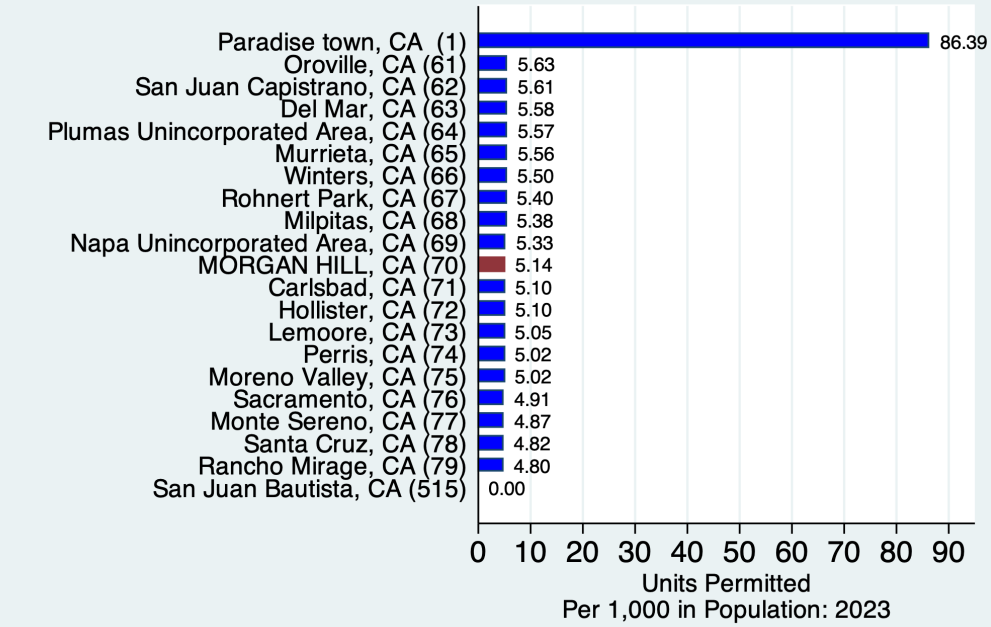
Morgan Hill - Ranking Among Comparables

Figure 66: Number of Units Permitted - Nationwide Comparables (Rank)



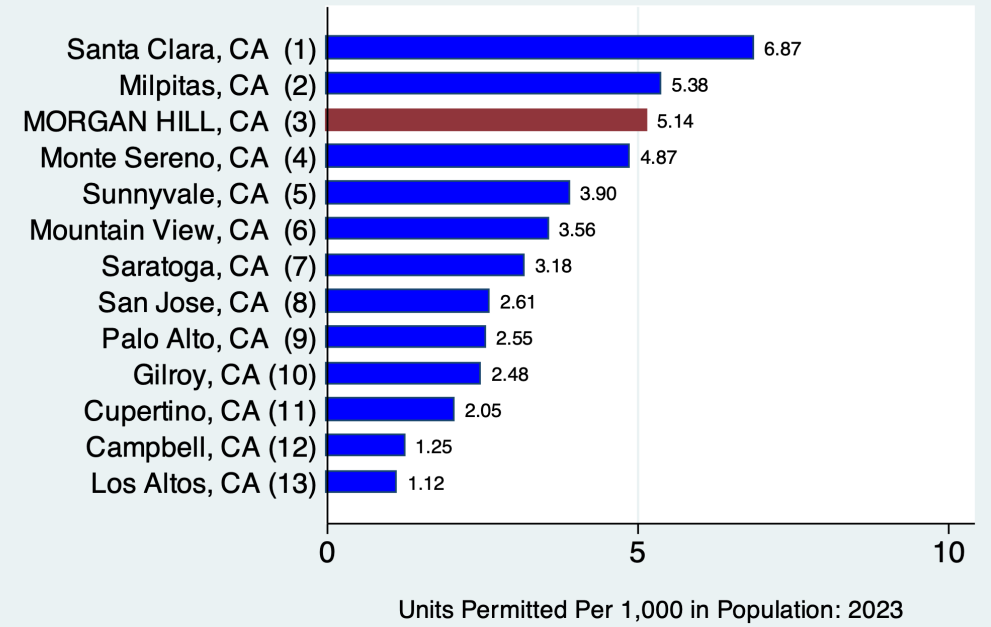
Source: U.S. Census Bureau
The # in parentheses is the ranking out of 14338 geographies.
Graph by: National Economic Education Delegation (www.NEEDEcon.org)

Figure 67: Number of Units Permitted - California Comparables (Rank)



Source: U.S. Census Bureau.
The # in parentheses is the ranking out of 515 geographies.
Graph by: National Economic Education Delegation (www.NEEDEcon.org)

Figure 68: Number of Units Permitted - Cities in Santa Clara County (Rank)



Source: U.S. Census Bureau,
The # in parentheses is the ranking out of 13 geographies.
Graph by: National Economic Education Delegation (www.NEEDEcon.org)

Morgan Hill - Permitting Activity

Annual Units Permitted - Per Capita in Morgan Hill

Figure 69: Units Permitted Each Year

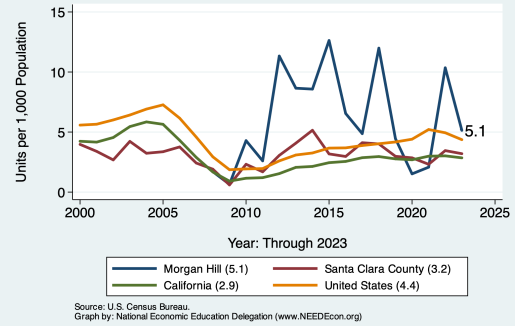
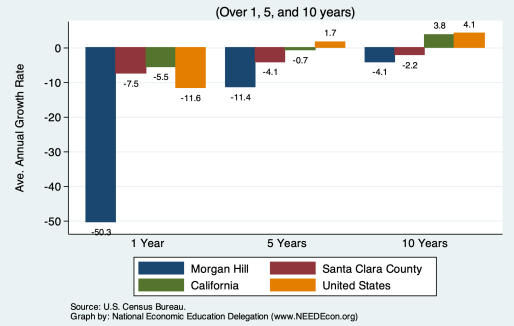


Figure 70: Average Annual Growth in Units Permitted



Annual Number of Buildings Permitted - Per Capita in Morgan Hill

Figure 71: Units Permitted Each Year

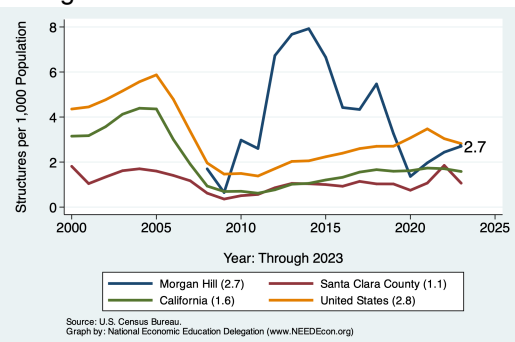
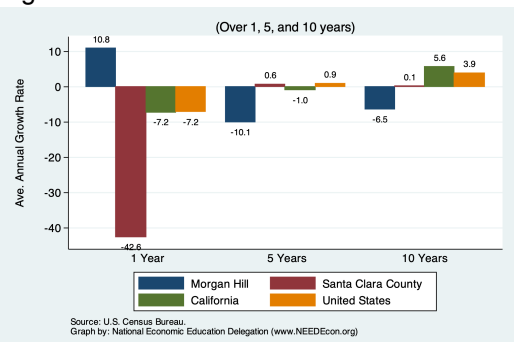


Figure 72: Average Annual Growth in Buildings Permitted



Annual Value of Property Permitted - Per Capita in Morgan Hill

Figure 73: Value Permitted Each Year

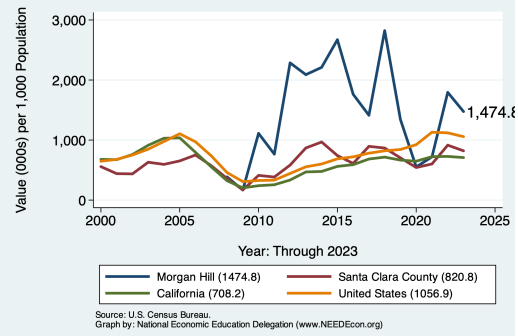
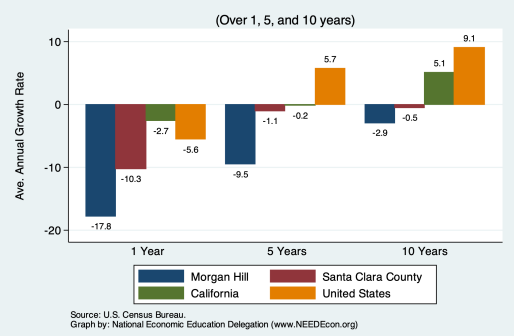


Figure 74: Average Annual Growth in Value Permitted



Commute Patterns

During the recovery from the Great Recession, the period from 2010 to 2019, the Bay Area economy, and Silicon Valley in particular, has been growing at a pace roughly double that of the state as a whole and triple that of the nation. This growth has precipitated a tight housing market and also brought about some significant changes in commute patterns, many of which have been reversed by the pandemic. Recent years have seen significant changes in both the mode of transportation and commute times.

Mode of Transportation

Figure 75: Percent of Workers Commuting by Car Alone

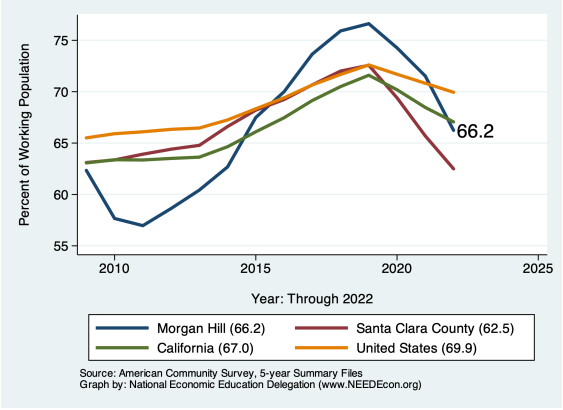


Figure 76: Percent of Workers Commuting by Carpool

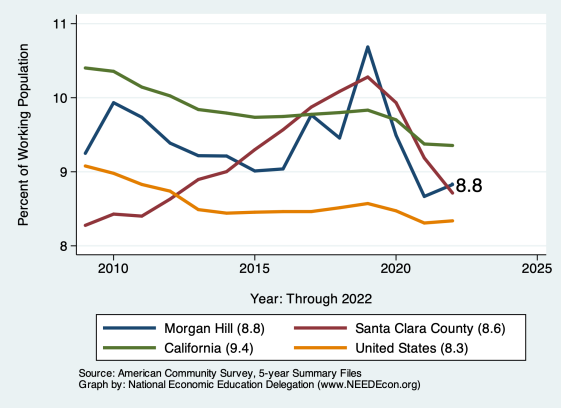


Figure 77: Percent of Workers using Public Transportation

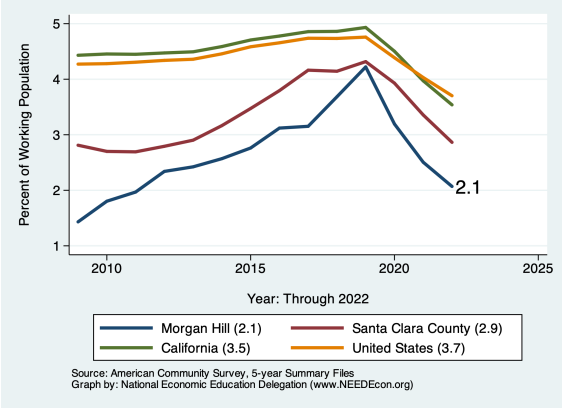
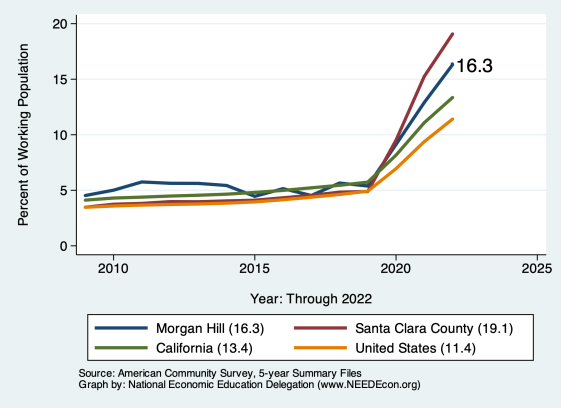


Figure 78: Percent of Workers Who Work From Home



The first table on this page presents data for those who LIVE in Morgan Hill. The second provides data on those who work, but do not necessarily live in Morgan Hill. The final two columns provide for a comparison of commute mode choices of people locally with those in California more broadly.

Table 6. SEX OF WORKERS BY MODE OF TRANSPORTATION TO WORK

	Male		Female		All Workers		All of CA
Mode of Transit	#	(%)	#	(%)	#	(%)	(%)
Car, Truck, or Van:	9,051	74.4	7,311	73.6	16,362	75.1	78.0
Drove Alone	8,186	67.3	6,252	62.9	14,438	66.2	68.4
Carpooled:	865	7.1	1,059	10.7	1,924	8.8	9.5
In 2-person carpool	724	6.0	746	7.5	1,470	6.7	6.9
In 3-person carpool	124	1.0	122	1.2	246	1.1	1.5
In 4-or-more-person carpool	17	0.1	191	1.9	208	1.0	1.1
Public Transportation (excl Taxi):	322	2.6	129	1.3	451	2.1	3.6
Bus or Trolley Bus	225	1.9	96	1.0	321	1.5	2.3
Streetcar or Trolley Car	0	0.0	5	0.1	5	0.0	0.8
Subway or Elevated	97	0.8	28	0.3	125	0.6	0.3
Railroad	0	0.0	0	0.0	0	0.0	0.2
Ferryboat	0	0.0	0	0.0	0	0.0	0.1
Bicycle	108	0.9	19	0.2	127	0.6	0.7
Walked	117	1.0	197	2.0	314	1.4	2.4
Taxicab, Motorcycle, or other	55	0.5	118	1.2	173	0.8	1.7
Worked at Home	1,955	16.1	1,599	16.1	3,554	16.3	13.6
Total:	11,608	95.5	9,373	94.4	20,981	96.3	

Source: 2022 5-year American Community Survey, Summary File

Table 7. SEX OF WORKERS BY MODE OF TRANSPORTATION TO WORK FOR WORKPLACE GEOGRAPHY

	Male		Female		All Workers		All of CA
Mode of Transit	#	(%)	#	(%)	#	(%)	(%)
Car, Truck, or Van:	7,898	74.5	6,405	75.0	14,303	75.8	78.0
Drove Alone	6,910	65.2	5,664	66.4	12,574	66.7	68.5
Carpooled:	988	9.3	741	8.7	1,729	9.2	9.5
In 2-person carpool	700	6.6	544	6.4	1,244	6.6	6.9
In 3-person carpool	118	1.1	86	1.0	204	1.1	1.5
In 4-or-more-person carpool	170	1.6	111	1.3	281	1.5	1.1
Public Transportation (excl Taxi):	43	0.4	88	1.0	131	0.7	3.6
Bus or Trolley Bus	43	0.4	79	0.9	122	0.6	2.3
Streetcar or Trolley Car	0	0.0	0	0.0	0	0.0	0.8
Subway or Elevated	0	0.0	0	0.0	0	0.0	0.3
Railroad	0	0.0	0	0.0	0	0.0	0.2
Ferryboat	0	0.0	9	0.1	9	0.0	0.1
Bicycle	61	0.6	19	0.2	80	0.4	0.7
Walked	283	2.7	263	3.1	546	2.9	2.4
Taxicab, Motorcycle, or other	107	1.0	54	0.6	161	0.9	1.7
Worked at Home	1,955	18.4	1,599	18.7	3,554	18.8	13.6
Total:	10,347	97.6	8,428	98.7	18,775	99.5	

Source: 2022 5-year American Community Survey, Summary File
The results in this table are for those who work in the region, regardless of the location of their residence.

Commute Times for Employed Residents

Table 8. SEX OF WORKERS BY TRAVEL TIME TO WORK

	Male		Female		All Workers		All of CA
Mode of Transit	#	(%)	#	(%)	#	(%)	(%)
Less than 5 minutes	174	1.5	138	1.5	312	1.5	2.0
5 to 9 minutes	681	6.1	864	9.2	1,545	7.5	7.5
10 to 14 minutes	762	6.8	882	9.4	1,644	8.0	12.2
15 to 19 minutes	886	7.9	858	9.1	1,744	8.5	15.0
20 to 24 minutes	692	6.2	628	6.7	1,320	6.4	14.3
25 to 29 minutes	429	3.8	187	2.0	616	3.0	6.3
30 to 34 minutes	937	8.3	903	9.6	1,840	8.9	15.0
35 to 39 minutes	383	3.4	457	4.9	840	4.1	2.9
40 to 44 minutes	760	6.8	701	7.5	1,461	7.1	4.3
45 to 59 minutes	1,511	13.4	1,022	10.9	2,533	12.3	8.6
60 to 89 minutes	1,836	16.3	855	9.1	2,691	13.0	7.9
90 or more minutes	602	5.4	279	3.0	881	4.3	4.0
Total:	9,653	85.9	7,774	82.8	17,427	84.5	

Source: 2022 5-year American Community Survey, Summary File

Figure 79: Percent of Employed Population With Commutes of More than 30 Minutes

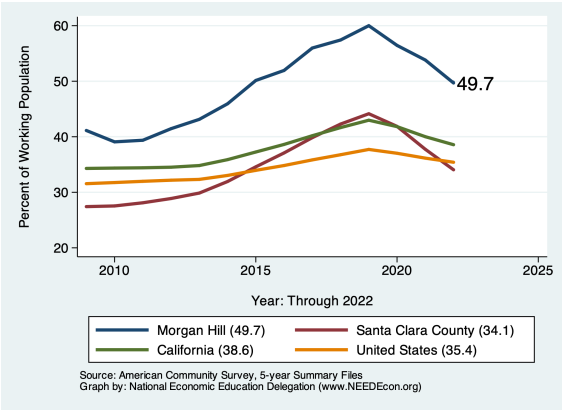


Figure 80: Percent of Employed Population With Commutes of More than 90 Minutes

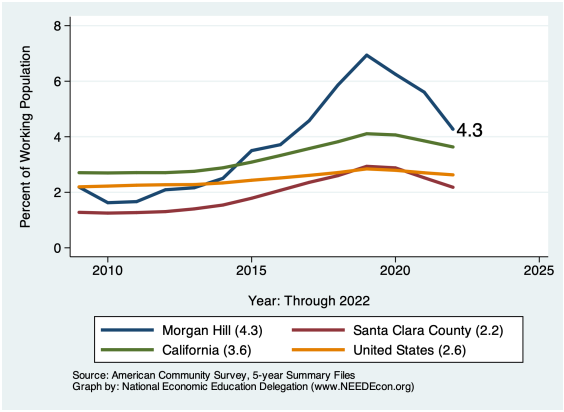
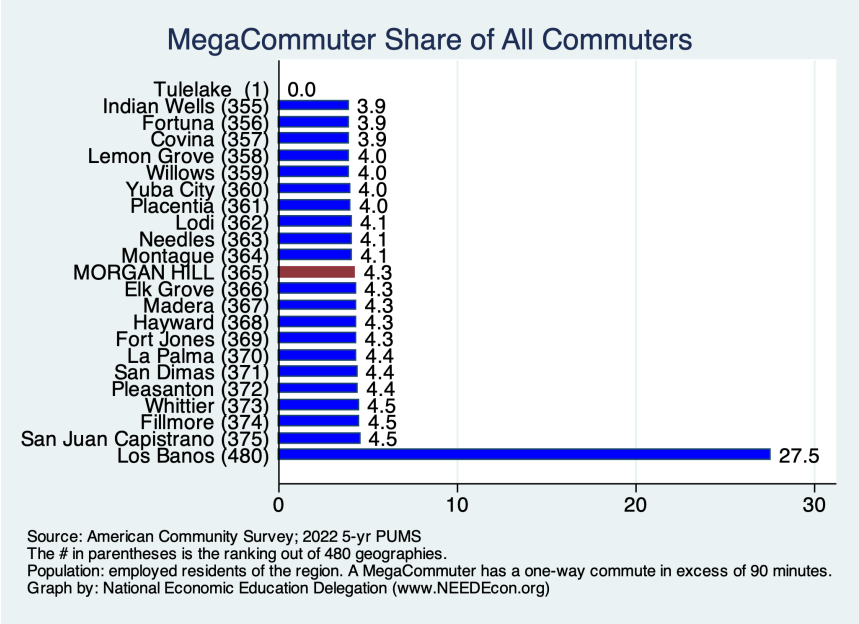


Figure 81: Rank: Share of MegaCommuters Across Similar Geographies



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Commute Times for Those Employed in the City

Table 9. SEX OF WORKERS BY TRAVEL TIME TO WORK FOR WORKPLACE GEOGRAPHY

	Male		Female		All Workers		All of CA
Mode of Transit	#	(%)	#	(%)	#	(%)	(%)
Less than 5 minutes	186	1.9	149	1.9	335	1.9	2.0
5 to 9 minutes	712	7.4	897	11.3	1,609	9.3	7.5
10 to 14 minutes	776	8.0	970	12.3	1,746	10.1	12.2
15 to 19 minutes	1,227	12.7	1,275	16.1	2,502	14.5	15.0
20 to 24 minutes	1,310	13.6	848	10.7	2,158	12.5	14.3
25 to 29 minutes	548	5.7	702	8.9	1,250	7.2	6.3
30 to 34 minutes	1,205	12.5	772	9.7	1,977	11.5	15.0
35 to 39 minutes	194	2.0	169	2.1	363	2.1	2.9
40 to 44 minutes	500	5.2	302	3.8	802	4.6	4.3
45 to 59 minutes	670	6.9	311	3.9	981	5.7	8.6
60 to 89 minutes	594	6.2	322	4.1	916	5.3	7.9
90 or more minutes	470	4.9	112	1.4	582	3.4	4.0
Total:	8,392	87.0	6,829	86.2	15,221	88.2	

Source: 2022 5-year American Community Survey, Summary File
The results in this table are for those who work in the region, regardless of the location of their residence.

Figure 82: Percent of Local Employees With Commutes of More than 30 Minutes

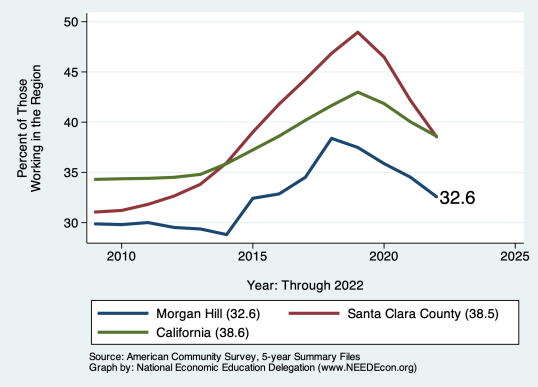


Figure 83: Percent of Local Employees With Commutes of More than 90 Minutes

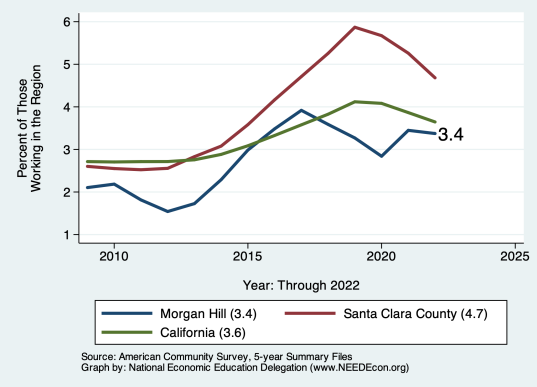
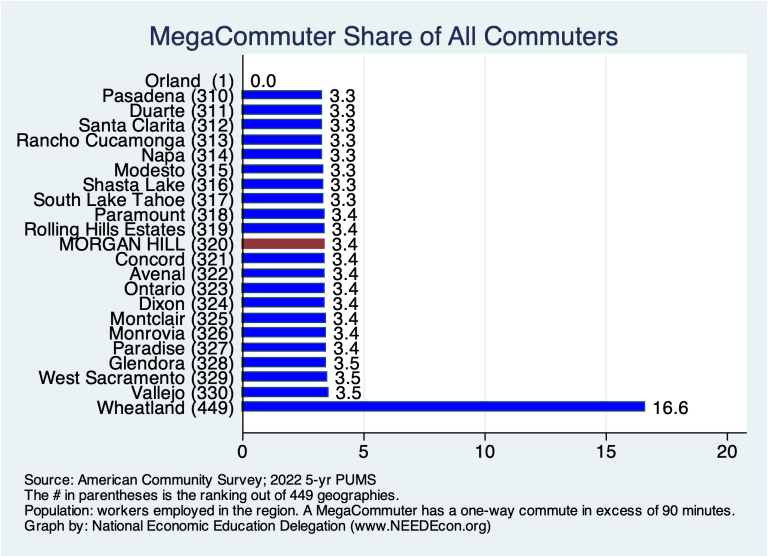


Figure 84: Rank: Share of MegaCommuters Across Similar Geographies



Place of Work

This section provides evidence on where workers living in Morgan Hill work. As evidenced in the first table, some of Morgan Hill's employed workers work in the City, but many do not. The first table and graph pair provide evidence at the county level while the second provide evidence with regard to working outside of the Morgan Hill city boundary.

Table 10. SEX OF WORKERS BY PLACE OF WORK–STATE AND COUNTY LEVEL

	Male		Female		All Workers		All of CA
Place of Work	#	(%)	#	(%)	#	(%)	(%)
Worked in state of residence:	11,584	95.3	9,368	94.3	20,952	96.1	99.6
Worked in county of residence	10,748	88.4	8,857	89.2	19,605	89.9	84.1
worked outside of county of residence	836	6.9	511	5.1	1,347	6.2	15.4
Worked outside state of residence	24	0.2	5	0.1	29	0.1	0.4
Total:	11,608	95.5	9,373	94.4	20,981	96.3	

Source: 2022 5-year American Community Survey, Summary File

Figure 85: Percent of Workers Employed Outside of Their County of Residence

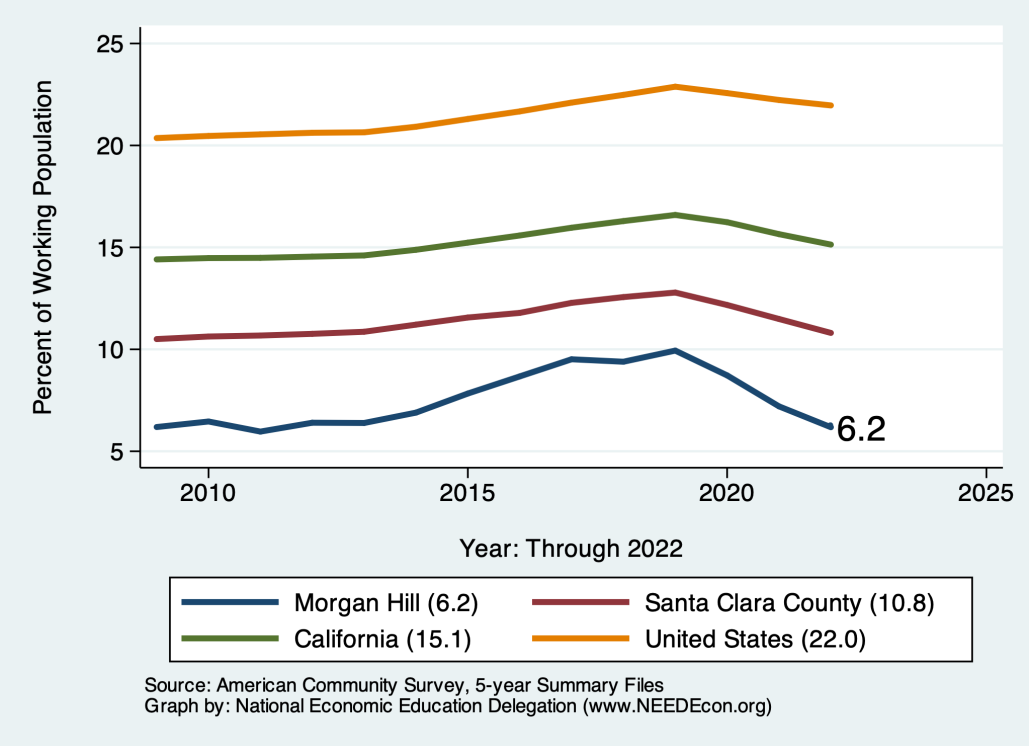
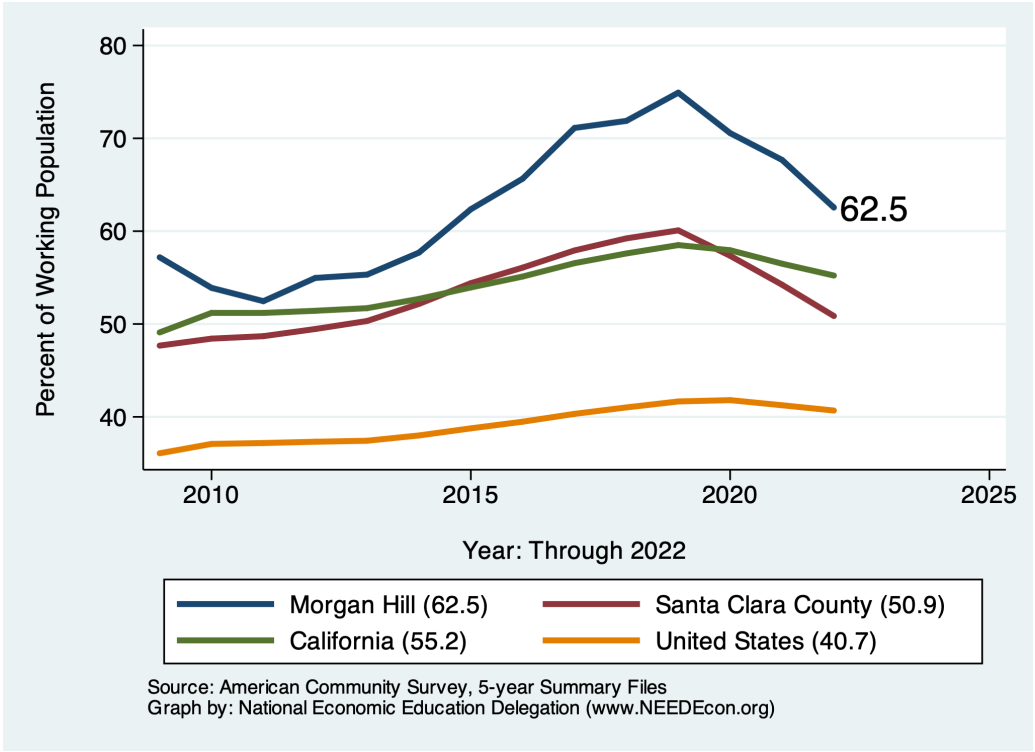


Table 11. SEX OF WORKERS BY PLACE OF WORK–PLACE LEVEL

Place of Work	Male #	Male (%)	Female #	Female (%)	All Workers #	All Workers (%)	All of CA (%)
Living in a place:	11,608	95.5	9,373	94.4	20,981	96.3	95.9
Worked in place of residence	3,764	31.0	3,585	36.1	7,349	33.7	39.5
Worked outside place of residence	7,844	64.5	5,788	58.3	13,632	62.5	56.4
Not living in a place	0	0.0	0	0.0	0	0.0	4.1
Total:	11,608	95.5	9,373	94.4	20,981	96.3	

Source: 2022 5-year American Community Survey, Summary File

Figure 86: Percent of Workers Employed Outside of Their Place of Residence



Commute Mode by Income

Table 12. MEDIAN EARNINGS IN THE PAST 12 MONTHS BY MEANS OF TRANSPORTATION TO WORK

	City	California		United States	
	Median	*Median*	*Ratio*	*Median*	*Ratio*
Car, truck, or van - drove alone	69,459	48,566	89.8	46,171	89.3
Car, truck, or van - carpooled	71,222	36,463	122.7	34,487	122.6
Public transportation (excluding taxicab)	129,485	40,179	202.4	45,100	170.5
Walked	38,750	29,366	82.9	27,142	84.8
Taxicab, motorcycle, bicycle, or other means	43,667	40,433	67.8	36,140	71.7
Worked from home	105,318	75,153	88.0	67,180	93.1
Total:	77,632	48,747	159.3	46,099	168.4

Source: 2022 5-year American Community Survey, Summary File

Notes: 1) Ratio = the ratio of the regional median to either the CA or US median, relative to the Total ratio.
Values above 100 imply a high local median. Values below 100 imply a low local median.
For example, a value of 200 means that the local mean is 2x higher than would be expected.
For "Total:", ratio is simply the ratio of the medians.
2) For regions with more than one geography, the medians are averages weighted by working population.

Table 13. MODE OF TRANSPORTATION TO WORK BY WORKERS' EARNINGS

	< $25,000		$25,000-$74,999		$75,000+		All		All of CA
Mode of Transit	#	(%)	#	(%)	#	(%)	#	(%)	(%)
Car, Truck, or Van: Drove Alone	2,052	36.7	4,412	71.9	6,860	63.7	14,438	66.3	68.4
Car, Truck, or Van: Carpooled	372	6.7	468	7.6	939	8.7	1,924	8.8	9.5
Public Transportation (excl Taxi)	90	1.6	36	0.6	312	2.9	451	2.1	3.6
Walked	113	2.0	77	1.3	88	0.8	314	1.4	2.4
Taxicab, Motorcycle, or other	89	1.6	88	1.4	114	1.1	300	1.4	2.4
Worked at Home	281	5.0	678	11.1	2,451	22.8	3,554	16.3	13.6
Total:	2,997	53.6	5,759	93.9	10,764		20,981	96.4	100.0

Source: 2022 5-year American Community Survey, Summary File

Table 14. MODE OF TRANSPORTATION TO WORK BY WORKERS' EARNINGS FOR WORKPLACE GEOGRAPHY

	< $25,000		$25,000-$74,999		$75,000+		All		All of CA
Mode of Transit	#	(%)	#	(%)	#	(%)	#	(%)	(%)
Car, Truck, or Van: Drove Alone	2,819	42.5	4,701	75.3	3,595	51.9	12,574	66.7	68.5
Car, Truck, or Van: Carpooled	482	7.3	397	6.4	596	8.6	1,729	9.2	9.5
Public Transportation (excl Taxi)	58	0.9	28	0.4	0	0.0	131	0.7	3.6
Walked	160	2.4	143	2.3	207	3.0	546	2.9	2.4
Taxicab, Motorcycle, or other	49	0.7	43	0.7	73	1.1	241	1.3	2.4
Worked at Home	281	4.2	678	10.9	2,451	35.4	3,554	18.8	13.6
Total:	3,849	58.1	5,990	95.9	6,922		18,775	99.5	

Source: 2022 5-year American Community Survey, Summary File

The results in this table are for those who work in the region, regardless of the location of their residence.

Commute Mode by Poverty Status

Table 15. MODE OF TRANSPORTATION TO WORK BY POVERTY STATUS

	In Poverty		100-149% of Pov		>150% of Pov		All		All of CA
Mode of Transit	#	(%)	#	(%)	#	(%)	#	(%)	(%)
Car, Truck, or Van: Drove Alone	169	14.6	239	27.3	14,030	67.3	14,438	66.2	68.7
Car, Truck, or Van: Carpooled	7	0.6	36	4.1	1,881	9.0	1,924	8.8	9.5
Public Transportation (excl Taxi)	37	3.2	0	0.0	414	2.0	451	2.1	3.6
Walked	56	4.8	0	0.0	258	1.2	314	1.4	2.1
Taxicab, Motorcycle, or other	0	0.0	0	0.0	300	1.4	300	1.4	2.4
Worked at Home	10	0.9	11	1.3	3,533	16.9	3,554	16.3	13.6
Total:	279	24.1	286	32.6	20,416	97.9	20,981	96.3	

Source: 2022 5-year American Community Survey, Summary File

Table 16. MODE OF TRANSPORTATION TO WORK BY POVERTY STATUS FOR WORKPLACE GEOGRAPHY

	In Poverty		100-149% of Pov		>150% of Pov		All		All of CA
Mode of Transit	#	(%)	#	(%)	#	(%)	#	(%)	(%)
Car, Truck, or Van: Drove Alone	297	33.9	328	37.3	11,949	66.6	12,574	66.7	68.7
Car, Truck, or Van: Carpooled	67	7.6	7	0.8	1,655	9.2	1,729	9.2	9.5
Public Transportation (excl Taxi)	37	4.2	0	0.0	94	0.5	131	0.7	3.6
Walked	19	2.2	61	6.9	466	2.6	546	2.9	2.1
Taxicab, Motorcycle, or other	0	0.0	0	0.0	241	1.3	241	1.3	2.4
Worked at Home	10	1.1	11	1.2	3,533	19.7	3,554	18.8	13.6
Total:	430	49.1	407	46.2	17,938		18,775	99.5	

Source: 2022 5-year American Community Survey, Summary File
The results in this table are for those who work in the region, regardless of the location of their residence.

Migration

Overall Migration Flows

Definition:

The United States is a country with an increasingly mobile population. People move, migrate, from one place to another with increasing frequency.

Why is it important?

Having a handle on whether or not Morgan Hill is a net recipient (migration inflows) or donor (migration outflows) of population is very important for understanding trends in the City's development. This section outlines migration patterns by age, education, income, marital status, and housing tenure. Understanding recent trends is very important for making policy, investment, and other decisions about the future. Also, understanding the extent to which the population is stable, or experiences significant turnover each year is helpful for planning purposes.

Figure 87: Overall Movements of Residents

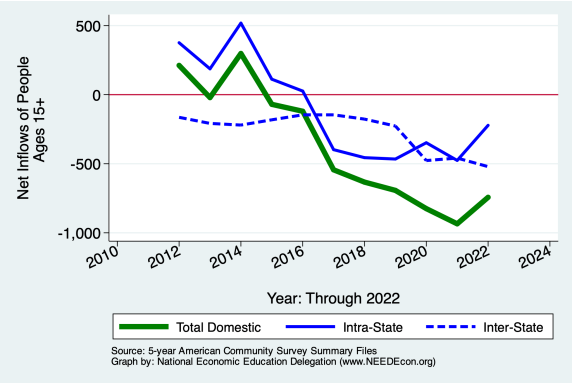


Table 17: Migration by Income

		Net Inflows				
			Same State			
Category	Population	All Migration	W/in County	Between Counties	Across States	From Abroad
No income	4,818	152	198	11	−79	22
With income	30,634	−638	471	−902	−442	235
$1 to $9,999 or loss	3,091	−269	−110	−143	−77	61
$10,000 to $14,999	1,839	−221	18	−49	−216	26
$15,000 to $24,999	2,479	−107	−13	−146	−8	60
$25,000 to $34,999	2,298	−295	−92	−135	−68	0
$35,000 to $49,999	3,765	212	243	−96	14	51
$50,000 to $64,999	2,539	38	107	−35	−34	0
$65,000 to $74,999	1,409	−206	−68	−138	0	0
$75,000 or more	13,214	210	386	−160	−53	37
All:	35,452	−486	669	−891	−521	257

Source: 2022 5-year American Community Survey, Summary File
Note: The data in this and other tables in this section are limited in that there is no information on the City's population that has moved abroad.
The "From Abroad" column is gross movements into the City from abroad.

Figure 88: Overall Movements of Low Income Residents

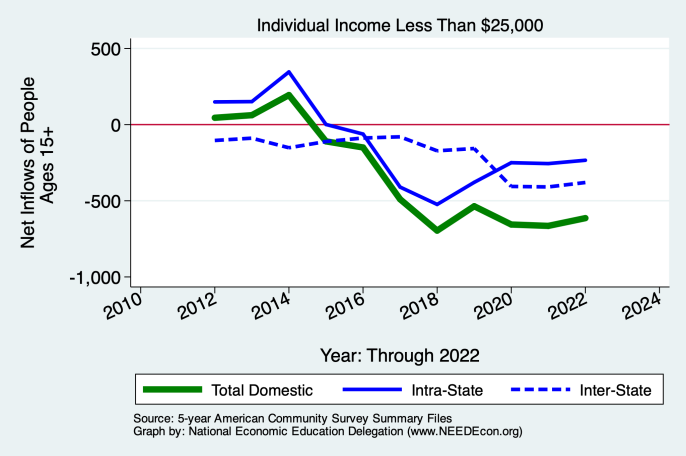


Figure 89: Overall Movements of Middle Income Residents

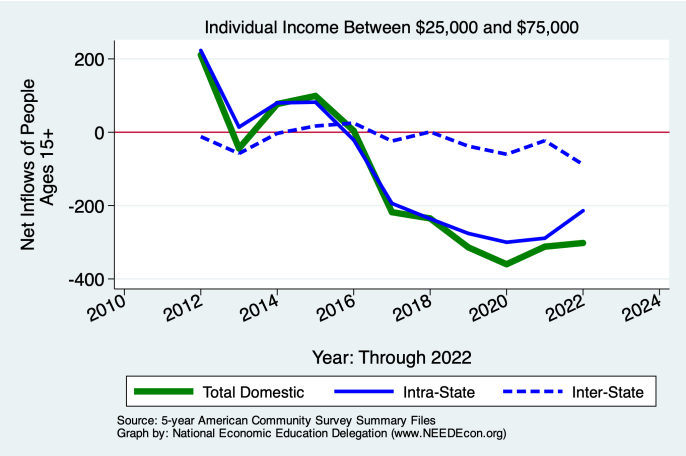
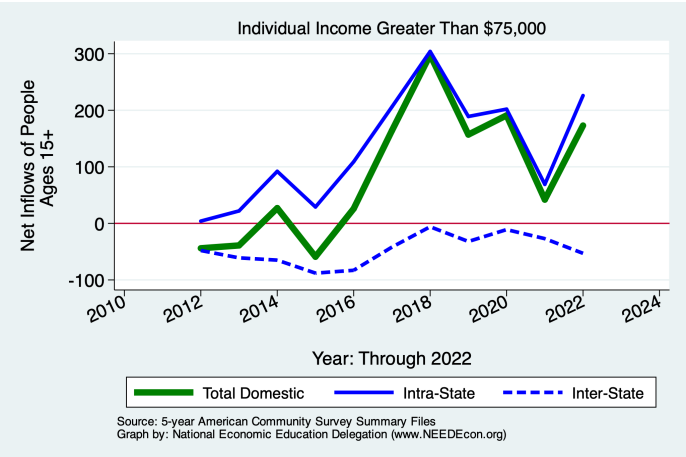


Figure 90: Overall Movements of High Income Residents



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Demographics of Migration Flows

Table 18: Migration by Marital Status

Category	Population	Net Inflows				
			Same State			
		All Migration	W/in County	Between Counties	Across States	From Abroad
Never married	10,371	−568	145	−608	−253	148
Now married, except separated	20,374	298	636	−288	−153	103
Divorced	3,035	−156	−22	−13	−121	0
Separated	396	−47	−54	1	0	6
Widowed	1,276	−13	−36	17	6	0
Total:	35,452	−486	669	−891	−521	257

Source: 2022 5-year American Community Survey, Summary File

Table 19: Migration by Tenure

Category	Population	Net Inflows				
			Same State			
		All Migration	W/in County	Between Counties	Across States	From Abroad
Householder lived in owner-occupied housing units	31,157	287	1,050	−557	−367	161
Householder lived in renter-occupied housing units	13,234	−298	88	−394	−163	171
Total:	44,391	−11	1,138	−951	−530	332

Source: 2022 5-year American Community Survey, Summary File

Figure 91: Domestic Movements of Residents by Tenure

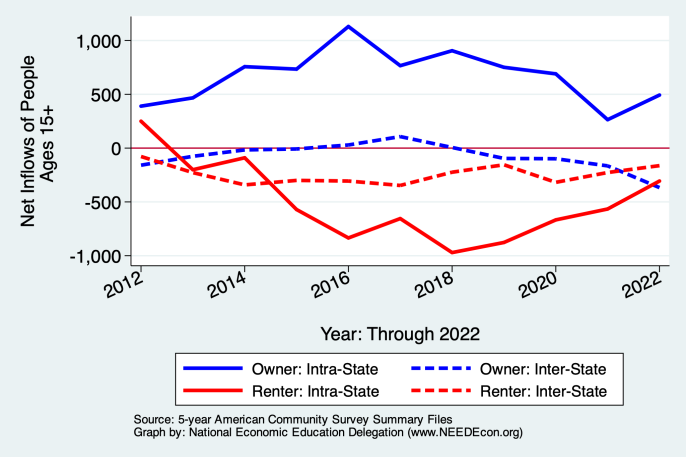

Table 20: Migration by Age

		Net Inflows				
			Same State			
Category	Population	All Migration	W/in County	Between Counties	Across States	From Abroad
1 to 4 years	3,060	224	201	57	−34	0
5 to 17 years	8,313	190	313	−153	−45	75
18 and 19 years	1,062	−109	56	−122	−43	0
20 to 24 years	2,456	−546	−167	−228	−194	43
25 to 29 years	2,491	−67	−43	−128	−1	105
30 to 34 years	2,898	308	343	−64	−15	44
35 to 39 years	3,198	70	128	−25	−60	27
40 to 44 years	2,906	6	29	−19	−23	19
45 to 49 years	2,827	−132	41	−105	−68	0
50 to 54 years	3,131	39	90	−42	−9	0
55 to 59 years	3,026	19	52	−43	4	6
60 to 64 years	2,883	−41	33	−2	−72	0
65 to 69 years	2,415	−112	−7	−72	−33	0
70 to 74 years	1,660	−26	12	−29	−9	0
75 years and over	2,578	124	99	−12	24	13
Total Population:	44,904	−53	1,180	−987	−578	332

Source: 2022 5-year American Community Survey, Summary File

Table 21: Migration by Educational Attainment

		Net Inflows				
			Same State			
Category	Population	All Migration	W/in County	Between Counties	Across States	From Abroad
Less than high school graduate	2,564	−35	26	−64	−10	13
High school graduate (includes equiv)	4,912	−3	113	−129	7	6
Some college or assoc. degree	8,834	−14	242	−197	−164	105
Bachelor's degree	8,948	1	186	−115	−160	90
Graduate or professional degree	4,755	239	210	−36	65	0
Total:	30,013	188	777	−541	−262	214

Source: 2022 5-year American Community Survey, Summary File

Table 22: Median Income of Migration Flows

Flow	In-Migration	Out-Migration
Same House 1 Year Ago	60,049	60,049
Moved Within Same County	61,190	50,339
Moved to Different County, Same State	58,713	38,988
Moved Between States	48,929	12,247
Moved from Abroad	23,634	
Total Population:	59,762	57,739

Source: 2022 5-year American Community Survey, Summary File

Table 23: Median Age of Migration Flows

Flow	In-Migration	Out-Migration
Same House 1 Year Ago	39.9	39.9
Moved Within Same County	32.3	29.3
Moved to Different County, Same State	35.6	28.7
Moved Between States	33.3	23.0
Moved from Abroad	25.9	
Total Population:	38.4	38.5

Source: 2022 5-year American Community Survey, Summary File

References and Sources

The majority of the data presented in this report are from the American Community Survey (ACS). For larger geographies, the 1-year Summary Files provide the data. For smaller communities, roughly those with less than 65,000 in population in 2021, the 5-year Summary Files provide the data.

The ACS data are supplemented by building permit data from the U.S. Census Bureau, population and housing data from the California Department of Finance, and home price and rental rates from Zillow.

U.S. Census Bureau. American Community Survey 1-year and 5-year Summary Files. https://www.census.gov/programs-surveys/acs/data/data-via-ftp.html. The 1-year data are released in September each year and the 5-year data are relased in January.

Zillow Research Data https://www.zillow.com/research/data/

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