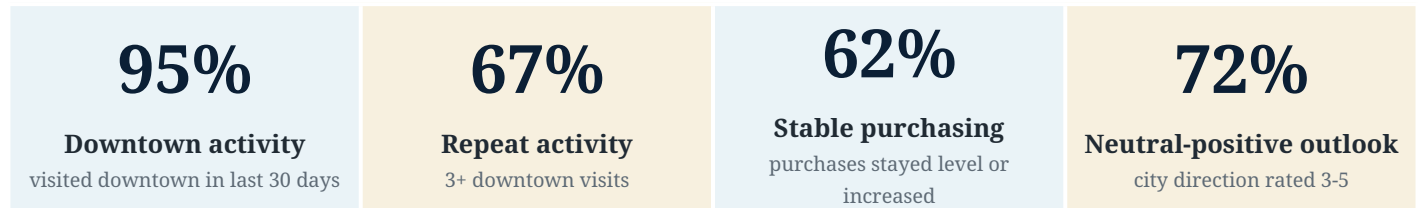


# SOUTH COUNTY PULSE

## Public Snapshot | April 2026

Localized economic intelligence on consumer demand, spending movement, downtown activity, and regional economic movement across Morgan Hill and Gilroy.



This public snapshot is designed for broad community visibility. The detailed executive brief includes deeper city-by-city metric tables, expanded resident themes, and institutional interpretation.

### Public Read

South County remains highly engaged locally, with strong downtown participation and stable purchasing activity across both communities. The strongest public-facing opportunities center on dining demand, retail variety, downtown activation, local convenience, and experience-oriented business growth.

# Executive Public Read

The public-facing South County signal shows active local engagement and measurable regional demand. Downtown activity remains strong across both communities, with clear opportunities around dining, retail variety, downtown activation, local convenience, and experience-driven business growth.

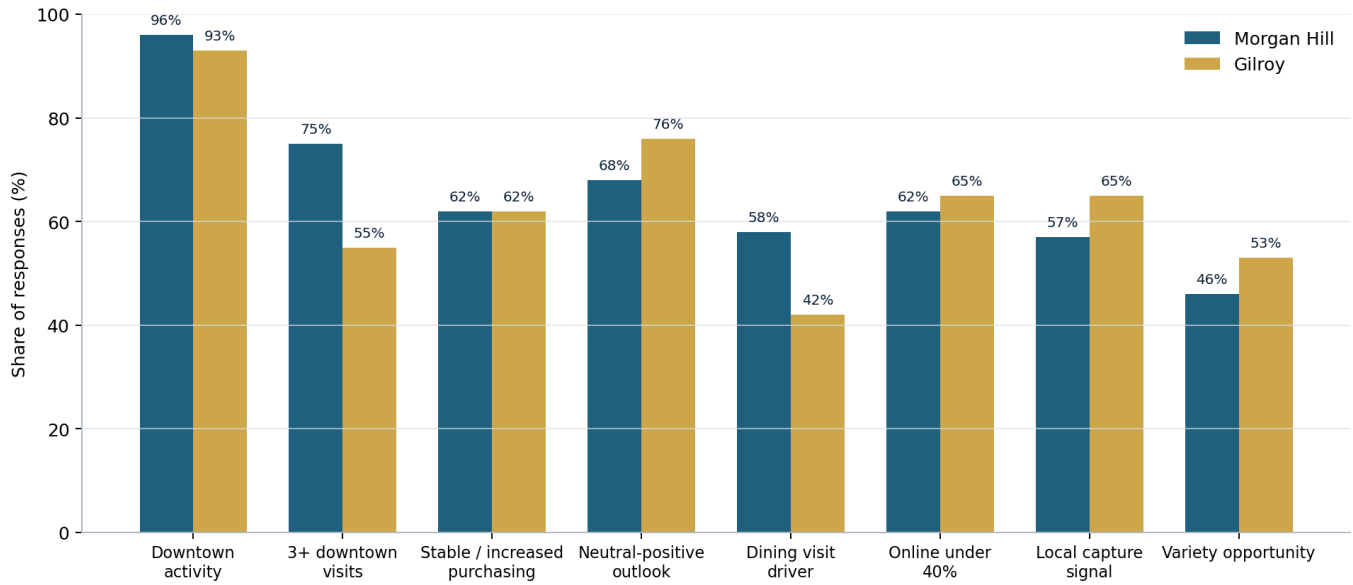
- 95% of the South County public signal shows downtown activity in the past 30 days.
- 67% indicate repeat downtown activity with 3+ visits in the past 30 days.
- 62% report purchases stayed level or increased over the last 30 days.
- 72% rate local city direction as neutral-to-positive over the next 12 months.
- 51% identify dining and restaurants as the leading downtown visit driver.
- 63% report online shopping below 40% of recent shopping activity.

Metric	Morgan Hill	Gilroy	Directional Reading
Visited downtown in past 30 days	96%	93%	High local engagement
3+ downtown visits	75%	55%	Morgan Hill shows heavier repeat activity
Purchases stayed level or increased	62%	62%	Purchasing activity remains resilient
Neutral-to-positive city direction	68%	76%	Gilroy shows broader neutral-to-positive outlook
Dining / restaurants as visit driver	58%	42%	Dining remains the core downtown anchor
Online shopping below 40%	62%	65%	Local and in-store demand remain meaningful
Local purchase capture signal	57%	65%	Local spending capture remains meaningful
Limited variety as opportunity signal	46%	53%	Retail variety is the leading recapture signal

# Cross-City Signal Matrix

Morgan Hill and Gilroy are both active consumer markets, but they show different public-facing demand patterns. Morgan Hill shows stronger repeat downtown engagement, while Gilroy shows a broader neutral-to-positive city outlook and clear opportunity for downtown activation and business variety.

### Cross-City Public Demand Signals



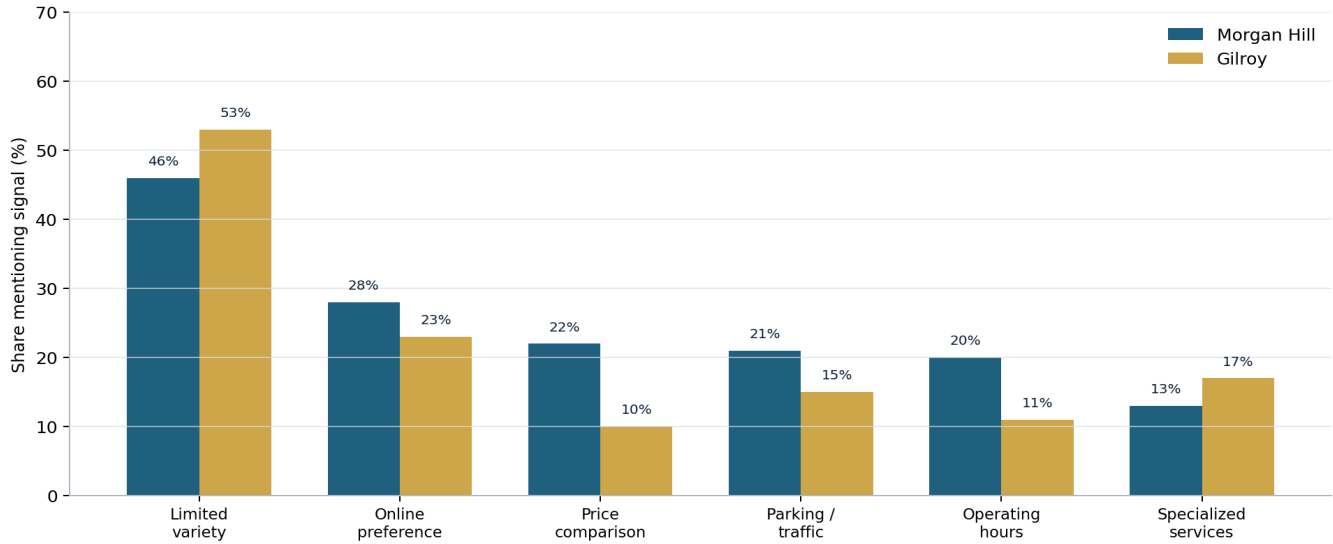
### Directional Takeaway

South County does not have a single consumer profile. Morgan Hill currently reads as a high-engagement downtown market with stronger repeat activity, while Gilroy reads as an activation-sensitive market with clear opportunity for downtown improvement and expanded business variety.

# Local Demand Recapture Opportunities

The strongest public opportunity is not simply price. Variety, convenience, online substitution, operating hours, parking, and specialized-service gaps all point to where local markets can recapture more resident spending.

### Primary Local Recapture Signals



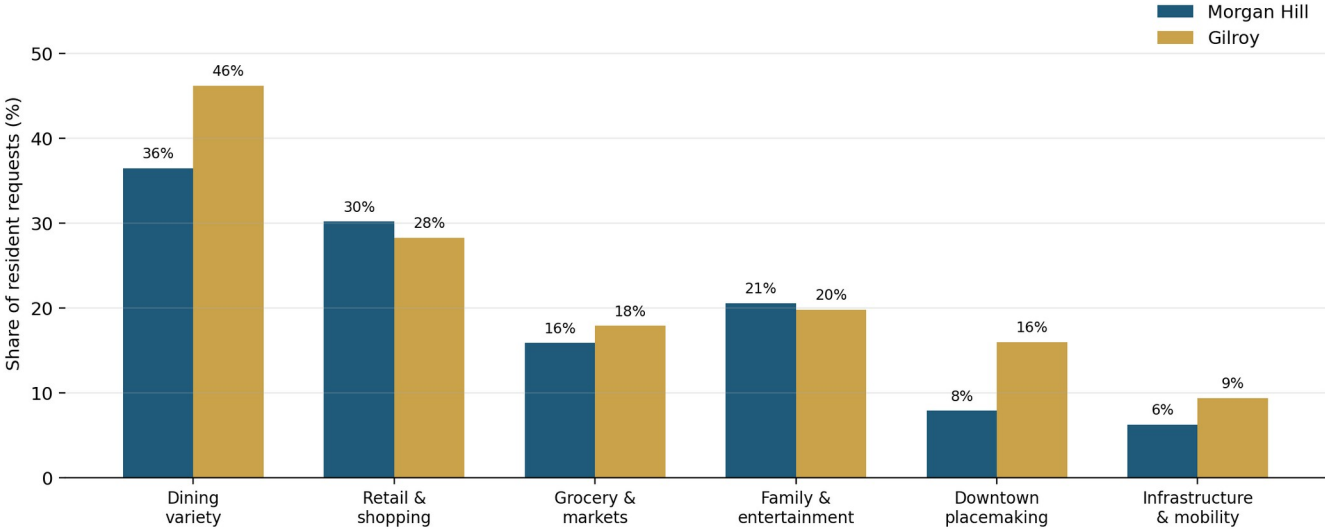
Opportunity Signal	Morgan Hill	Gilroy
Limited variety / selection	46%	53%
Preference for online shopping	28%	23%
High prices compared to other areas	22%	10%
Parking or traffic concerns	21%	15%
Operating hours	20%	11%
Lack of specialized services	13%	17%

# Downtown Activity And Public Demand Themes

Dining is the dominant downtown driver in both cities, but the public demand signal extends beyond restaurants. Residents repeatedly point toward better retail variety, grocery and specialty market access, family-friendly activities, and downtown placemaking.

Downtown Visit Reason	Morgan Hill	Gilroy
Dining / restaurants	58%	46%
Coffee / casual meetups	12%	12%
Shopping / retail	9%	11%
Events / festivals	2%	5%
Just passing through	11%	17%

## Public Demand Themes



# Public Implications

These public signals are useful because they convert broad community sentiment into directional economic movement. The pattern is clear: South County residents are engaged locally, but local markets must compete harder on variety, convenience, affordability, and experience.

<p><b>For Chambers &amp; Cities</b></p> <p>Prioritize retail recruitment, downtown activation, business mix planning, and public-facing economic communication.</p>	<p><b>For Developers &amp; Investors</b></p> <p>Demand is strongest around dining variety, practical retail, grocery access, family entertainment, and experience-oriented downtown uses.</p>
<p><b>For Financial Institutions</b></p> <p>Use regional demand, spending resilience, and affordability signals to better understand consumer conditions and local business environment beyond lagging indicators.</p>	<p><b>For Commercial Operators</b></p> <p>Local demand exists, but execution must match community expectations around price, selection, hours, parking, and convenience.</p>
<p><b>For Community Partners</b></p> <p>Recurring public intelligence can help connect resident demand to business attraction, infrastructure, and growth priorities.</p>	<p><b>For NextMove Metrics</b></p> <p>South County Pulse establishes a recurring public layer of regional economic intelligence, with deeper executive intelligence available by request.</p>

## Representative Public Comments

City	Resident Signal
Morgan Hill	More affordable family restaurants.
Morgan Hill	More retail in downtown.
Morgan Hill	Small stores for downtown, not just restaurants.
Gilroy	More indoor activity centers for kids and adults.
Gilroy	Continue working on downtown with quality restaurants.
Gilroy	Make it easier for small businesses to operate downtown. Spruce things up.

# About NextMove Metrics

NextMove Metrics is a regional economic intelligence platform focused on identifying localized demand movement, consumer behavior shifts, and economic activity across South County and Silicon Valley.

Through continuous intelligence collection, behavioral analysis, and regional monitoring systems, NextMove Metrics helps organizations better understand where communities are evolving, where spending is moving, and how local economies are changing in real time.

The platform supports chambers of commerce, municipalities, developers, financial institutions, and commercial operators seeking forward-looking regional intelligence beyond traditional lagging reports.

**South County Pulse is the public-facing intelligence layer. Detailed executive briefs, custom briefings, and city-specific reporting are available for organizations that need deeper visibility.**

**Contact: [info@nextmovemetrics.com](mailto:info@nextmovemetrics.com)**

## Request The Full Executive Brief

For a detailed city-by-city brief, presentation, or custom intelligence package, contact [info@nextmovemetrics.com](mailto:info@nextmovemetrics.com).