Analysis of the
DURHAM, NORTH CAROLINA HOUSING MARKET

as of November 1, 1967

A Report by the
DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT
FEDERAL HOUSING ADMINISTRATION
WASHINGTON, D. C. 20411

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ANALYSIS OF THE

DURHAM, NORTH CAROLINA, HOUSING MARKET

AS OF NOVEMBER 1, 1967

Field Market Analysis Service
Federal Housing Administration
Department of Housing and Urban Development

Foreword

As a public service to assist local housing activities through clearer understanding of local housing market conditions, FHA initiated publication of its comprehensive housing market analyses early in 1965. While each report is designed specifically for FHA use in administering its mortgage insurance operations, it is expected that the factual information and the findings and conclusions of these reports will be generally useful also to builders, mortgagees, and others concerned with local housing problems and to others having an interest in local economic conditions and trends.

Since market analysis is not an exact science, the judgmental factor is important in the development of findings and conclusions. There will be differences of opinion, of course, in the interpretation of available factual information in determining the absorptive capacity of the market and the requirements for maintenance of a reasonable balance in demand-supply relationships.

The factual framework for each analysis is developed as thoroughly as possible on the basis of information available from both local and national sources. Unless specifically identified by source reference, all estimates and judgments in the analysis are those of the authoring analyst and the FHA Market Analysis and Research Section.

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ANALYSIS OF THE DURHAM, NORTH CAROLINA, HOUSING MARKET AS OF NOVEMBER 1, 1967

Summary and Conclusions

1. The economic base of the Durham Housing Market Area (HMA) is well-diversified; the area is an important commercial, medical, and educational center as well as a tobacco and textile manufacturing center. Economic growth has been influenced recently by research and development activities and other employers attracted to the Research Triangle Park. The most significant addition has been the transfer of IBM from Raleigh to the Park in late 1966. The 1966-1967 employment increase of 5,080 jobs included the IBM transfer.

   In the 1960-1966 period, there was a net addition of 7,400 nonagricultural wage and salary jobs, of which 73 percent (5,400) occurred after 1963. Virtually all growth occurred in nonmanufacturing industries.

   In the two-year forecast period, from November 1967 to November 1969, 3,300 wage and salary jobs will be added in nonagricultural industries. Virtually all gains are expected in nonmanufacturing, primarily in the service industry.

2. The population of the HMA was 130,600 in November 1967, reflecting an increase of 18,600 over the April 1960 total of 112,000. Roughly two-thirds of the 1960-1967 population increase occurred after 1963, indicating average gains of 3,225 annually from 1964 to 1967. By November 1969, the population is expected to reach 136,725, an annual gain of 3,075 over the forecast period.

3. In November 1967, there were 39,050 households in the HMA indicating a total household increase of 7,825 in the post-1960 period. Over two-thirds of the 1960-1967 growth occurred after 1963, indicating a 1964-1967 addition of 1,350 households annually. In the two-year forecast period, the number of households is expected to increase to 41,250, an annual gain of 1,100 households.

4. The housing supply of the Durham HMA was 40,050 units in November 1967, of which 70 percent (27,900 units) was in single-family structures. The addition of 7,050 units since April 1960 included the construction of 9,050 units, the addition of 180 trailers, and the removal of 2,180 units, pri-

marily by planned demolition activity. The housing supply is characterized by a significant proportion of old structures. Over one-fourth of the housing supply was built before 1930 and nearly one-tenth was judged to be substandard. In November, there were 200 single-family units and 400 multifamily units in various stages of construction.

5. Available housing was in short supply in November 1967. Of the 700 units available for occupancy, only 100 were available for sale (a 0.5 percent homeowner vacancy rate) and 600 units were available for rent (a 3.3 percent renter vacancy rate). The 1960 vacancy rates were 1.4 percent for homeowner units and 5.2 percent for rental units.

6. The volume of net additions to the housing supply that will meet the requirement of anticipated growth during the forecast period and result in the maintenance of a quantitative demand-supply balance in the market is 900 single-family units and 650 multifamily units annually. The multifamily demand estimate includes 150 units at rents achievable through public benefits or assistance and excludes public housing and rent-supplement accommodations. Demand for single-family housing by price class is expected to approximate the pattern shown on page 22. Annual demand for multifamily units is distributed by monthly rent and unit size on page 23.

ANALYSIS OF THE DURHAM, NORTH CAROLINA, HOUSING MARKET AS OF NOVEMBER 1, 1967

Housing Market Area

The Durham, North Carolina, Housing Market Area (HMA) is defined as Durham County and is coterminous with the Durham Labor Market Area as defined by the North Carolina Employment Security Commission. These definitions differ from that of the Durham Standard Metropolitan Statistical Area which was broadened in March 1967 to include Orange County.

Durham, in the north central section of North Carolina, is located within North Carolina's dominant educational area. The University of North Carolina (Chapel Hill), North Carolina State College (Raleigh) and Duke University (Durham) represent the state's largest and finest educational complex. The three cities constitute what has become known as the "Research Triangle" because of the general orientation of the area to university and other research activities.

Because Durham is located only 20 miles northwest of Raleigh and only 10 miles northeast of Chapel Hill, a high volume of daily commutation characterizes the employment pattern of the Research Triangle area. Of the 2,143 residents of the HMA who worked outside Durham County in 1960, nearly 59 percent were part of the Orange County (Chapel Hill) or Wake County (Raleigh) labor forces. Orange and Wake Counties also accounted for 71 percent of the 3,166 workers commuting into the HMA from other areas. By September 1966, nearly 5,537 nonresidents were part of the Durham County labor force,[1/] of whom 69 percent lived in Orange and Wake Counties. The development of the Research Triangle Park in Durham County, particularly since the addition of the IBM plant in late 1966, has increased the volume of commutation from Wake County into the HMA so that persons working in the HMA and living in Wake County have risen from 21 percent of all in-commuters in 1960 to about 40 percent in 1967.

1/ Based on a survey of 1,100 Durham County employers during the week of September 12-17, 1966 by the North Carolina Employment Commission.

Worker Commutation Patterns
Durham County, North Carolina
1960-1966

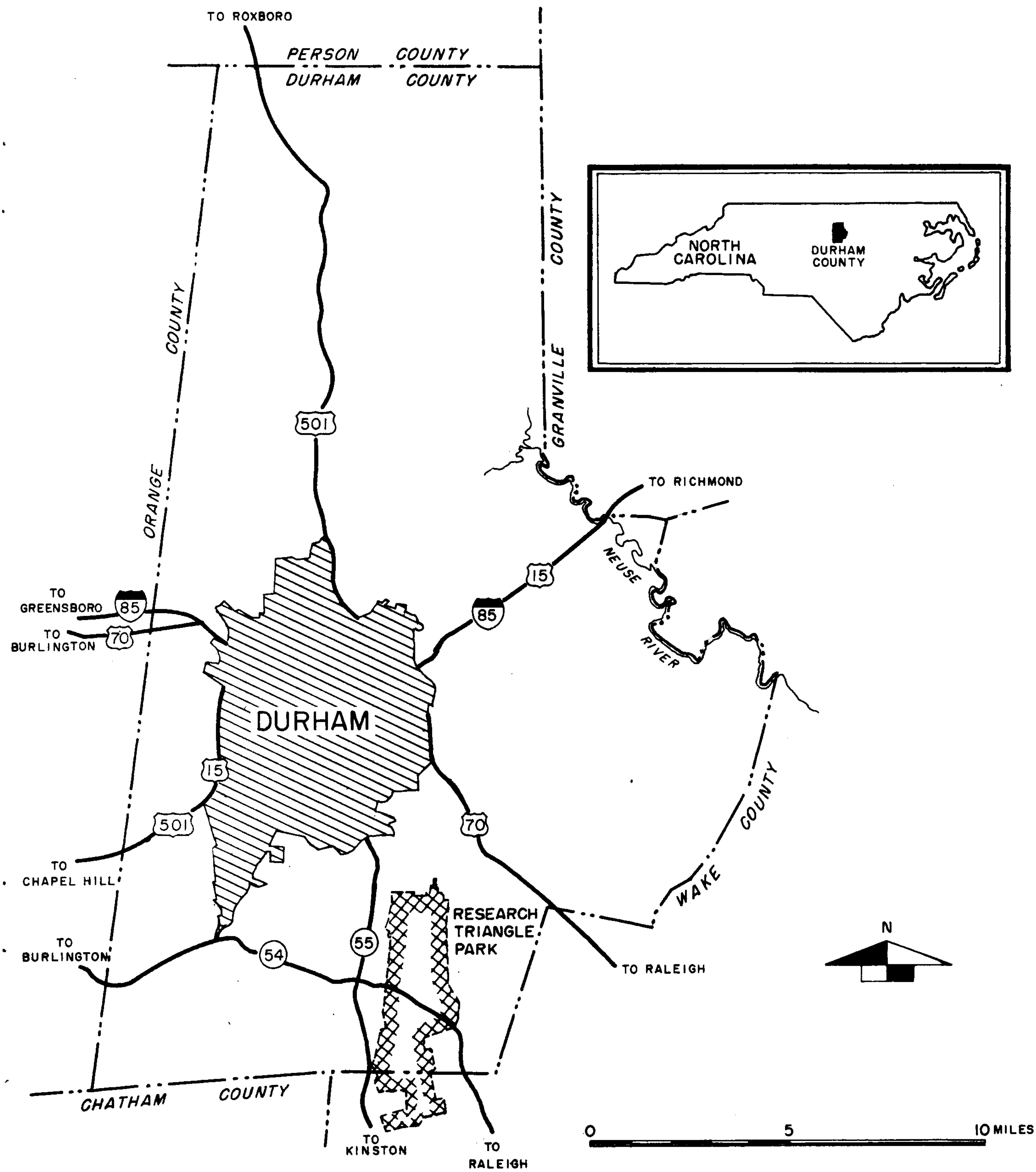
Area	Commuting Workers From the HMA April 1960	Into the HMA April 1960	Into the HMA Sept. 1966
Chatham Co.	19	119	123
Granville Co.	174	295	432
Orange Co.	746	1,606	2,663
Person Co.	49	196	693
Wake Co.	519	651	1,145
Other	636	299	481
Total	2,143	3,166	5,537

Source: U.S. Bureau of the Census and North Carolina Employment Security Commission.

Durham is located in the west-central portion of Durham County. It is the county seat and only incorporated area in the HMA. In 1960, the city contained 78,300 persons and accounted for almost 70 percent of the total population.

Major highways serving Durham are east-west Interstate 85, the major link in the HMA with Greensboro 55 miles west of Durham, U.S. 70 connecting Raleigh and Durham, and north-south U.S. highways 15 and 501. Other transportation facilities include six bus lines, five railroads and 21 trucking firms. Three airlines serve the HMA via the Raleigh-Durham Airport in Wake County.

DURHAM, NORTH CAROLINA, HOUSING MARKET AREA



Economy of the Area

Character and History

A major factor in the development of manufacturing in the HMA economy was its location in one of the most important tobacco growing areas of the world and its proximity to major South Atlantic cotton, fruit, and vegetable producing areas. Tobacco, textiles, and food products production remain significant and, until the advent of IBM in late 1966, accounted for three-fourths of all manufacturing jobs. The tobacco industry alone accounted for 40 percent of 1966 manufacturing employment. Eighteen brands of cigarettes and smoking tobacco are made in Durham; some 19 percent of all cigarettes produced in the nation are produced in the HMA. Employment in these industries has declined in recent years because of the automation of manufacturing processes.

The economy is well-diversified, however, and Durham's location within the Research Triangle has been the major factor in recent growth of the HMA. The economy has not only benefited by the influx of students, teachers, and other university-associated personnel, but also by the development of a major medical complex that includes the Duke University Medical Center, a Veterans Administration hospital, and the North Carolina Cerebral Palsy Hospital. Durham is also the home of North Carolina College, a state-supported institution, and several insurance companies, including North Carolina Mutual Insurance Company.

College Enrollment. Increasing college enrollment in the HMA has accounted for much of the growth in recent years. In the 1960-1967 period, the number of students attending Duke University and North Carolina College has risen by 42 percent from 7,675 to 10,900. Over 69 percent of the post-1960 increase occurred after 1963 as the trend toward graduate education continued. Duke University plans to strengthen graduate school enrollment throughout the 1960's, despite the increased volume of undergraduate applications. Graduate enrollment increases accounted for 62 percent of the growth from 1963 to 1967.

North Carolina College has expanded rapidly in the 1960's, particularly in the 1964-1966 period. From 1966 to 1967, however, there was a slight decline in the North Carolina College student body as a result of a lack of facilities and by the application of stricter standards of admission. A continuation of the 1966-1967 policy is indicated by North Carolina College officials so that a nominal increase of 55 students annually is planned for the forecast period.

Duke University planning officials indicated an enrollment increase of about two percent annually for the forecast period. The plans for increased graduate enrollment may have been thwarted by the change in Selective Service policy with regard to draft deferments for graduate students, however, and only nominal increases are expected in the near future. Firm estimates will be made when the impact of draft policy changes becomes clear. Table I presents college enrollment trends for the 1950-1969 period.

In addition to college enrollment increases, the development of an industrial park in the HMA has been the prime factor in economic growth since 1960. The Research Triangle Park, a 5,000-acre site located in southeast Durham County and part of Wake County equidistant from the three major universities in the Raleigh-Durham-Chapel Hill area, has developed in the HMA since 1960 as a base for governmental and industrial research. In 1959, the Research Triangle Institute was formed to act as a medium for the dissemination of university findings to industries located in the Park and became the first occupant of the Park. Since that time, 13 firms have located there and about 4,000 people work at the Park. Most of these firms employ comparatively few people. In late 1966, however, International Business Machines Corporation (IBM) moved the major portion of its operations from Raleigh into the Park.

Employment

Current Estimate and Past Trend. Nonagricultural wage and salary employment averaged 51,360 in 1967,[1] including 14,410 manufacturing workers and 36,950 employed in nonmanufacturing industries. The 11 percent employment gain from the same period in 1966 (5,080 jobs) is unprecedented in the post-1960 period and is attributable in large part to plant staffing at IBM in the Research Triangle Park. From calendar 1960 through calendar 1966, wage and salary employment increased by 7,400 (19 percent) from 39,600 to 47,000. Of the increase, 73 percent occurred after 1963; all but a minor portion of the increase occurred in nonmanufacturing industries (see table following).

1/ As used in this section of the analysis, "1967" refers to the 12-month period ending September 30, 1967.

Nonagricultural Wage and Salary Employment Trends
Durham County, North Carolina
1960-1967

Year	Manufacturing Total	Manufacturing Change	Nonmanufacturing Total	Nonmanufacturing Change	Wage and salary total Total	Wage and salary total Change
1960	13,050	-	26,550	-	39,600	-
1961	12,740	-310	27,580	1,030	40,320	720
1962	12,460	-280	28,270	690	40,730	410
1963	12,330	-130	29,270	1,000	41,600	870
1964	12,170	-160	30,720	1,450	42,890	1,290
1965	12,150	- 20	32,250	1,530	44,400	1,510
1966	12,400	250	34,600	2,350	47,000	2,600
12 mos. ending Sept.						
1966	12,340	-	33,940	-	46,280	-
1967	14,410	2,070	36,950	3,010	51,360	5,080

Source: North Carolina Employment Security Commission.

Employment By Industry. Manufacturing employment increased by 2,070 from 1966 to 1967, largely as a result of the establishment of IBM in the Research Triangle Park. Until 1967, the trend in manufacturing employment had been generally downward. Except for a nominal increase of 250 jobs from 1965 to 1966, manufacturing employment declined in the post-1960 period--from almost one-third of all jobs in 1960 to only 26 percent in 1966. Job losses reflect consistent declines in the major tobacco and textile industries. Tobacco employment decreased by 1,180 (19 percent) from 6,250 in 1960 to 5,070 in 1966, an average decline of 200 jobs annually. Losses continued in 1967 and the number employed in the tobacco industry (4,910) was 240 less than that of the comparable 1966 period. Automation of job functions and the transfer of stemmery divisions of several tobacco manufacturers to other tobacco-growing regions of North Carolina account for most of the job decline.

The number of jobs in the textile industry, in which employment is largely female, declined by 20 percent from 1960 (3,430) to 1964 (2,760) as a result of the lower level of national consumer demand during the early 1960's. Since 1964, the expanding national economy has resulted in recovery in the textile industry in the HMA so that employment reached 3,260 by 1967. (See table II).

Jobs in durable goods industries accounted for no more than 15 percent of all manufacturing employment in the HMA until 1967. Steady employment gains of 30 to 60 jobs annually after 1962 in the nonelectrical machinery industry reflected plant expansions in one local firm but did not offset losses in other durable goods industries in the post-1960 period. However, non-electrical machinery employment increased from 250 in 1966 to 2,430 in 1967 when IBM moved into the Research Triangle Park from temporary Raleigh offices. Although about 4,000 jobs were added over the 1960-1967 period at the Research Triangle Park, local sources indicate that a high proportion of those working in the Park reside in the Raleigh area.

In contrast to the downward trend in manufacturing employment, employment in nonmanufacturing industries has expanded continuously since 1960. The 3,010-job addition from 1966 to 1967 represents a record gain for the post-1960 period; about 910 jobs were added annually from 1960 to 1963 and gains were nearly double this level, at 1,775 annually, from 1964 to 1966. More than 56 percent of the 1960-1967 increase is the result of steady growth of the service industries, which expanded from less than 29 percent of all nonmanufacturing jobs (7,810) in 1960 to 37 percent (13,650) in 1967. Although much of the gain has occurred in hospital and educational services, which account for three-fourths of all service jobs, development of the Research Triangle Park has resulted in an added impetus to service employment growth. Among the largest employers in the research field included in the service category are Chemstrand, the Research Triangle Institute and Beaunit.

Female Employment. Based on September data for the 1960-1967 period, female employment has declined from 44 percent of all wage and salary jobs in 1960 (18,040) to 42 percent (22,420) in 1967. The trend, however, has not been consistently downward. In the early 1960's, which were marked by significant manufacturing job losses and only slight nonmanufacturing job gains, the number of working males actually declined from 23,360 in 1960 to 22,090 in 1963 so that the ten percent increase in female employment (1,910 jobs) from 1960 to 1963 accounted for all wage and salary employment growth in the HMA. From the post-1960 high of 47 percent of all jobs in 1963, the proportion of jobs held by women declined to 44 percent in 1965 and to 42 percent in 1967. Whereas the decline in female employment as a percent of the total from 1963 to 1965 reflected a slowdown in female employment gains, the decline in the last year is attributed to an increase in male employment, largely in manufacturing, in 1967.

Male and Female Employment Trends
Durham County, North Carolina
1960-1967

Month of September	Wage and salary jobs: Female Number	Female Change	Male Number	Male Change	Total employment
1960	18,040	-	23,360	-	41,400
1961	18,445	405	23,275	-85	41,720
1962	19,640	1,195	22,985	-290	42,625
1963	19,950	310	22,090	-895	42,040
1964	19,490	-460	24,240	2,150	43,730
1965	19,625	135	24,945	705	44,570
1966	20,715	1,090	25,685	740	46,400
1967	22,420	1,705	30,455	5,230	52,875

Source: North Carolina Employment Security Commission.

Employment Participation Rate. The ratio of employment to population is termed the participation rate. Relating wage and salary employment to 1960 population indicates an employment participation rate of about 35.4 percent at that time. Since 1960, the employment participation rate has risen substantially, to 39.3 percent in 1967, principally because of the addition of IBM to the Research Triangle Park in late 1966 (and other increases in job opportunities since 1960) which has resulted in a significant increase of worker in-commutation into the Durham labor market. Part of the increase is also a reflection of increases in the number of female and student employees. During the forecast period of this report, the participation rate is expected to decline slightly to 38.8 percent.

Unemployment

In the twelve months ending September 1967, the Durham unemployment rate averaged 3.9 percent, a significant decline from that of the comparable 1966 period, when 4.4 percent of the work force of the area was unemployed. The decline in the jobless rate over the year, however, reflects a ten percent increase in the work force (5,300 workers) rather than any significant drop in the number seeking work (see table below). The Durham unemployment rate has consistently remained above state and national averages, indicative of an excess labor supply in the HMA. This condition is attributed to the former dependence of the economy on tobacco growing and marketing, which required a large supply of unskilled labor.

Work Force Components
Durham, North Carolina, HMA
1962-1967

Component	1962	1963	1964	1965	1966	12 mos. ending Sept. 1966	12 mos. ending Sept. 1967
Civilian work force	50,440	51,950	53,360	54,340	56,970	56,070	61,370
Unemployment	3,240	3,490	3,320	2,830	2,510	2,440	2,420
Rate	6.4%	6.7%	6.2%	5.2%	4.4%	4.4%	3.9%
Total employment	47,200	48,460	50,040	51,510	54,460	53,630	58,950

Source: North Carolina State Employment Security Commission.

Future Employment Prospects

Nonagricultural wage and salary employment is projected to increase by 3,300 jobs from November 1967 to November 1969, with virtually all of the two-year net gain occurring in nonmanufacturing industries. The projected increase of 1,650 jobs annually over the forecast period is above gains of the 1960-1966 period when 1,225 jobs were added annually but is considerably below the 1965-1966 addition of 2,600 and the 1966-1967 gain of 5,075. Because no additional manufacturers are expected to locate in the HMA before 1969 and because of the fairly consistent declines in the tobacco industry, slight gains by small manufacturing industries with continued national economic prosperity probably will be offset by other manufacturing job losses, resulting in no significant manufacturing job increase over the present level.

As in the past, service trades are expected to account for much of the 3,300 increase projected for the 1967-1969 period. The Research Triangle Institute predicts continued employment increases until 1975; other employment gains in research-oriented firms in the HMA are probable. Continued growth of Duke University and Duke Medical Center also will add service jobs to the economy. The projected increase in service employment of 700 annually during the 1967-1969 period will be below the 1964-1966 average addition of 940 annually and the 1966-1967 increase of 1,250. The larger gains of 1964-1967 reflected research plant establishment at the Research Triangle Park as well as a high demand for personal and business service created by such plant establishment and by large student enrollment increases in recent years. The lack of such plant establishment during the next two years coupled with the fact that student enrollment gains are projected to be well below those of recent years (see page 4) indicates a slackening of service employment growth.

Family Income

1960 Census. Data for 1959 family incomes presented in the 1960 Census indicate that the median family income in Durham County ($4,875) is about the same as that in all urban areas in the state ($4,850). Of the six major metropolitan areas in North Carolina, however, both the Durham SMSA and the Raleigh SMSA rank low in median family income. Only in the Asheville SMSA, with a 1959 median of $4,425, was it lower. The lower income level in this area is attributable in part to the presence of young student families in the HMA, who are typically in the lower income categories.

1967 After-Tax Income. As of November 1967, the median family income in the HMA was $6,200, after the deduction of federal income tax. The median income of renter households of two persons or more, at $4,725 in 1967, was nearly one-quarter below that of all families, reflecting the inclusion of low-earning student families who constitute a significant segment of renter households. About 28 percent of all families and 40 percent of the renter households earn less than $4,000 annually after the deduction of federal income tax; 19 percent of all families and nine percent of the renter households earn $10,000 or more, on an after-tax basis. Table III presents a detailed distribution of families by after-tax income for 1967 and 1969. By 1969, median incomes are expected to increase to $6,750 for all families and $5,150 for renter households.

Demographic Factors

Population

Current Estimate and Past Trend. As of November 1967, the population of the HMA totaled 130,600, an increase of 18,600 (2,450 annually) since April 1960, when the population was slightly under 112,000. Average gains since 1960 have been more than double those of the 1950-1960 decade. Based on the trend of college enrollment and employment increases of the post-1960 period, it appears that about two-thirds of the population gain has occurred since the start of 1964, indicating an average increase of 3,225 annually from 1964 to 1967.

Nonhousehold population decreased from 7,375 in 1950 to 6,800 in 1960; by November 1967, it had increased to 7,975 as a result of rapidly increasing college enrollment.

The population of Durham, at 97,850 in November 1967, has increased by 19,550 since 1960. Over 80 percent of city growth, however, is the result of four annexations in 1966 which added nearly 14 square miles on the periphery of the city and added 15,800 persons to the population. In the 1950-1960 decade, the population of the city increased by 7,000, all in areas annexed to the city in the ten-year period. (See table IV).

Population Trends
Durham, North Carolina, HMA
1950-1969

Date	Population	Average annual change from preceding date
April 1950	101,639	-
April 1960	111,995	1,036
November 1967	130,600	2,450
November 1969	136,725	3,075

Sources: 1950 and 1960 Censuses of Population; estimates by Housing Market Analyst.

Components of Population Change. Net natural increase (excess of births over deaths) and net migration are the components of population change. The rate of population increase since 1960, which is more than double that of the previous decade, reflects a sharp reversal of the pattern of migration in recent years. From 1950 to 1960, net out-migration averaged 666 persons annually; since 1960, there has been a net in-migration of 1,050 persons a year so that 43 percent of the 1960-1967 population increase is the result of migration. More rapid college enrollment increases and recent economic advances account for the reversal of the pattern. The decline in net natural increase is a reflection of the national trend toward lower birth rates. Since 1960, the yearly excess of births over deaths has declined by more than one-third, from 1,500 in 1960 to 980 in 1966.

Components of Population Change
Durham, North Carolina, HMA
1950-1967

Component	Average annual change 1950-1960	1960-1967
Net natural increase	1,702	1,400
Net migration	-666	1,050
Total	1,036	2,450

Sources: U.S. Bureau of the Census, Population Report P-23; United States Vital Statistics; North Carolina Department of Health, Vital Statistics Division; and estimates by Housing Market Analyst.

Future Population. Based on future employment and enrollment projections, the population of the Durham HMA is expected to reach 136,725 by November 1969, an average increase of 3,075 annually over the forecast period. About 400 persons of the annual increase will be in nonhousehold population. Although the projected population represents an annual increase that is 36 percent greater than that of the annual average of the 1960-1967 period, the gain is well below the rapid expansion of the 1964-1967 period.

Households

Current Estimate and Past Trend. As of November 1967, there were 39,050 households (occupied dwelling units) in the HMA; the city of Durham accounted for 77 percent (29,900). Household growth from 1960 to 1967, averaging nearly 1,025 annually, is double that of the 1950-1960 decade when 513 households were added each year. The higher level of household formation since 1960 is the direct result of substantial enrollment increases at Duke and North Carolina State College and is also a reflection of the development of the Research Triangle Park and other employment gains of recent years. Based on annual trends in college enrollment and employment (adjusted for in-commutation), is is judged that over two-thirds of the post-1960 household growth occurred after 1963. The increase of 5,325 households after 1963 indicates an addition of about 1,350 households annually over the 1964-1967 period compared with average increases of roughly 710 annually from 1960 to 1963.

The addition of over 7,775 households in the city of Durham since 1960 compares with the 1950-1960 decennial household gain of only 3,700 in the city. At least half of the 1960-1967 gain represents the results of the annexation of 14 square miles in 1966 by the city of Durham.

Household Growth Trends
Durham, North Carolina, HMA
1950-1969

Date	Number of households	Average annual change from preceding date Total
April 1950	26,099	-
April 1960	31,228	513
November 1967	39,050	1,025
November 1969	41,250	1,100

Sources: 1950 and 1960 Censuses of Housing; estimates by Housing Market Analyst.

Average Household Size. The average size of all households in the Durham HMA was 3.14 persons as of November 1967, representing a continuation of the declining trend evident in the preceding decade when the number of persons per household declined from 3.61 to 3.37. Declining household size since 1960 is a reflection of lower birth rates in recent years and the increased rate of student household formation.

Future Household Growth. There are expected to be 41,250 households in the Durham HMA by November 1969, representing an average addition of 1,100 households annually over the two-year forecast period. The anticipated level of household formation will be nearly comparable with that of the 1960-1967 period but below the 1964-1967 increase of 1,375 annually.

Housing Market Factors

Housing Supply

Current Estimate and Past Trend. The housing supply of the Durham HMA totaled 40,050 units as of November 1967, indicating a 21 percent increase in the inventory since April 1960. The net addition of 7,050 units over the 1960-1967 period was the result of the construction of 9,050 units, the addition of about 180 trailers and the loss of 2,180 units, primarily by planned demolition activity. The net addition of 930 units annually after 1960 compared with a gain of 610 units a year in the 1950-1960 period.

The city of Durham, with a November 1967 inventory of 30,500 units, accounts for over three-fourths of the total inventory of the HMA. The increase of 7,250 units in the city since 1960 included the addition of 4,550 units by annexation in 1966.

Characteristics of the Housing Supply. The proportion of single-family structures declined from 85 percent of all units (27,900 units, including trailers) in 1960 to 80 percent (32,000 units) in 1967. The addition of 2,400 units in structures containing five units or more has resulted in a proportionate increase of larger multifamily structures from 4.5 percent of all units in 1960 (1,450 units) to ten percent (3,850 units) in 1967.

The inventory is characterized by a fair proportion of old housing. In November 1967, over one-fourth of the housing supply (10,400 units, or 26.0 percent) had been built before 1930 and nearly one-tenth of all units was judged to be substandard because of dilapidated condition or lack of complete plumbing facilities. The fact that 21 percent of the inventory was added between 1960 and 1967 and the large volume of demolition activity in that period resulted in a declining proportion of substandard housing, from 17 percent of all units in 1960 (5,675 units) to about ten percent in 1967.

Residential Building Activity

Past Trend. The trend of privately-financed residential building activity (as measured by units authorized for construction by building permits, which represents virtually all home building activity in the HMA) was upward from 1961 through 1965, as shown below. The volume of construction reached a peak in 1965 at 1,794 units. The tight money market of 1966 led to a 33 percent decline in home building activity in that year. Nine-month data for 1966 and 1967 indicate recovery of single-family home building and a downturn in multifamily construction in 1967.

Units Authorized for Construction
Durham, North Carolina, HMA
1960-1967

	Privately-financed units			
Year	Single-family	Multi-family	Total units	Other units[a/]
1960	741	84	825	-
1961	675	137	812	224
1962	829	160	989	50
1963	825	137	962	-
1964	837	315	1,152	-
1965	897	897	1,794	-
1966	593	604	1,197	400
First 9 mos.				
1966	501	464	965	400
1967	605	391	696	-

a/ Includes 450 units of public housing and 224 units of married student housing at Duke University.

Sources: C-40 Construction Reports, U.S. Bureau of the Census and local building inspectors.

Type of Structure. Virtually all of the increase in construction activity after 1961 is the result of increased multifamily building in the HMA. Single-family construction varied only slightly in the mid-1960's from 829 units in 1962 to 897 units in 1965. In 1966, single-family construction declined to fewer than 593 units as a result of the tight mortgage market. Some recovery is noted in 1967, as 600 single-family units were authorized in the first nine months. The city of Durham accounted for only about one-fourth of all new single-family homes built from 1960 through 1966.

Multifamily building ranged from only 84 units to 160 units in the early 1960's, accounting for less than 15 percent of all private residential construction from 1960 through 1963. The greater need for student residences, the high rate of demolition of rental housing, and the more rapid household growth after 1963 stimulated greater apartment construction, which reached a peak in 1965 when 897 multifamily units were authorized, one-half of all authorizations that year. In 1966, 604 privately-financed multifamily units were authorized, so that 1965 and 1966 were peak years of multifamily activity. The 1967 downturn in multifamily construction (391 units authorized in the first nine months) reflects a scarcity of mortgage and construction funds. The city of Durham accounted for 86 percent of all multifamily construction from 1960 through 1966.

Demolition Activity. Since April 1960, about 2,180 units have been removed from the housing supply, including at least 1,450 through planned urban renewal programs in the city. Highway construction programs also accounted for some demolition activity. In the two-year forecast period of this analysis, a continued high level of urban renewal activity and other inventory losses should result in the demolition of 900 units.

Tenure

Current Estimate and Past Trend. There were 21,300 owner-occupied units in the HMA in November 1967, 54.5 percent of all occupied units, compared with 51 percent in 1960 and less than 45 percent in 1950. The 1950-1960 trend toward increased homeownership continues in the HMA but at a slower rate. While owner-occupied units comprised 84 percent of the 1950-1960 increase in the number of households, owner-occupied units accounted for 69 percent of the 1960-1967 increase. The number of renter-occupied units increased from 14,500 in 1950 to 15,300 in 1960, an average addition of only 80 renter households annually during the fifties. Since 1960, renter households have expanded by over 320 a year to number 17,750 in 1967. A high proportion of renter households is characteristic of the HMA because of the number of college-oriented families in the area. The 1960 proportion of renter-occupancy (49 percent) was significantly above the average of all metropolitan areas of the state (less than 41 percent) as well as the state average for all urban areas (45 percent). (See table V).

Vacancy

1960 Census. The April 1960 Census enumerated 1,065 vacant available housing units, 3.3 percent of the available housing supply at that time. Of this total, 225 units were available for sale, a homeowner vacancy rate of 1.4 percent, and 840 units were available for rent, a rental vacancy rate of 5.2 percent. Only 27 percent of the available rentals in 1960 (230 units) were in multifamily structures. The available vacancies included 10 units for sale and 190 rentals that lacked some or all plumbing facilities.

Postal Vacancy Survey. A vacancy survey was conducted in the HMA during the week of November 3-7, 1967 by the Durham post office and covered 36,150 possible deliveries, slightly over 90 percent of the total housing supply. About 500 units were enumerated as vacant, including 350 residences (1.2 percent of all residences surveyed) and 150 apartment units (two percent of the possible apartment deliveries). New units accounted for only 17 percent of all vacancies (85 units) at the time of the survey. The survey also reported 408 apartment units and 195 residences in various stages of construction at that time (table VI).

The results of the postal vacancy survey data are not entirely comparable with the data published by the Bureau of the Census because of differences in definition, area delineations, and methods of enumeration. The census reports units and vacancies by tenure, whereas the postal vacancy survey reports units and vacancies by type of structure. The Post Office Department defines a "residence" as a unit representing one stop for one delivery of mail (one mailbox).

Current Estimate. Based on the results of the postal vacancy survey adjusted for incomplete coverage and conversion to census concepts, and on discussion with local informed sources and observation of the market, it is judged that about 700 units in the HMA were available for occupancy in November 1967. About 100 units were available for sale, a 0.5 percent sales vacancy rate, and 600 units were available for rent, 3.3 percent renter vacancy rate. Both sales and rental vacancy rates suggest a tight market.

Sales Market

General Market Conditions and New Subdivision Activity. A tight sales market developed in recent years as a result of the high rate of household formation after 1963 and a one-third decline in new home building in 1966 because of the lack of mortgage and construction funds. The tight market led to a rise in sales prices, although the lack of mortgage funds in 1966 resulted in a decline in existing home sales, according to local sources.

New home construction in the Durham area is characterized by a number of small building operations in existing subdivisions or on individual lots in scattered locations. Homes priced $25,000 and over account for a significant share of new home construction and existing home sales, reflecting the presence of high-income families associated with research activities and other high-paying industries. Of the 66 units listed for sale at the time of field work, one-third were priced at $25,000 and over. Homes in the highest price ranges of $40,000 or more are concentrated in areas west-southwest of the city. Most of the units contain at least four bedrooms and several have swimming pools and other recreational facilities.

Construction in the $20,000-$30,000 range characterizes subdivision development in north Durham. There also has been subdivision construction in the $20,000-$30,000 range in south Durham County in the post-1960 period, largely as a result of Research Triangle Park development. Although subdivision development started in this area in the $13,000-$17,000 range, homes are presently being built to sell in the higher price range indicated above. Continued development in this area is planned for the forecast period.

Units Under Construction. Of the 200 single-family units under construction in the HMA in November 1967, three-fourths were outside the city of Durham. Single-family construction in the HMA was primarily in scattered locations on the periphery of the city in November.

Rental Market

General Market Conditions. Rental housing in Durham was in short supply as of November 1967 not only because of rapid household growth and a need for student housing but also because of the removal of a large volume of substandard housing that had been primarily renter occupied. Units in multifamily structures had been added in unprecedented numbers since 1964, but absorption continued at a rapid rate with no adverse effect on competing older rentals. Although single-family units accounted for nearly 70 percent of the available rentals in 1960, suitable homes for rent were especially scarce in late 1967 and accounted for a smaller proportion of the rentals than they had in 1960.

New Rental Housing. Until the apartment building boom that started in 1964, additions to the multifamily inventory were generally in small apartment structures in scattered locations. The major portion of apartment construction since 1965 is concentrated in the $120-$140 rent range and most new units are in the two-bedroom size and include carpeting and drapes.

Vacancies are at an especially low level in new garden apartment projects. A check with two realtors that manage 264 units in five scattered new projects revealed a total of two vacancies at the time of field work. It is not unusual for new apartment projects to be fully leased before construction is completed.

Rental Housing Under Construction. As of November 1, 1967, there were an estimated 400 multifamily units under construction, all of which were privately-financed. Two project additions account for the construction of over 110 units and the largest apartment builder reported another 148 units under construction in four projects in November, all of which were two-bedroom units in the $130-$160 rent range.

Urban Renewal

Seven project areas have been delineated for urban renewal activity in Durham; six residential projects are presently in execution. Since 1960, 1,452 units have been demolished and 760 families have been relocated as of July 1, 1967. Another 978 units have yet to be cleared in the six areas and 131 families are to be relocated. Four projects were undertaken in conjunction with renewal and redevelopment of the central business district. Project R-41 is designated as an area of rehabilitation south of North Carolina College; Project R-54 was undertaken in conjunction with highway construction programs.

Urban Renewal Activity
Durham, North Carolina, HMA
1960-1967

Project Number	Number of units: Demolished as of July 1, 1967	Number of units: To be cleared	Families Relocated as of July 1, 1967: Private units	Families Relocated as of July 1, 1967: Public	Families to be relocated
R-16	439	44	148	58	-
R-17	417	14	223	69	11
R-26	131	121	18	-	100
R-41	216	179	55	36	11
R-52	88	88	25	20	8
R-54	161	532	108	-	1
Total	1,452	978	577	183	131

Source: Durham Redevelopment Commission.

Public Housing

Of the 1,152 public housing units in Durham, 450 were built since 1960 and 102 units were reconverted from a private apartment structure. Only 50 units are designated as housing for the elderly. No public housing was under construction in November 1967 although 106 units of housing for the elderly are planned and preliminary proposals have been made to purchase the 224 units of Duke married student housing for public housing uses. The public housing supply is well below demand because of the high volume of demolition activity and the large proportion of substandard units in the HMA. There is an active waiting list of about 780 families.

Student Housing

The number of Duke University students living in households more than tripled from 540 in 1960 to 2,200 in 1967, while enrollment rose by 40 percent in the same period. The fact that students living in households has risen faster than enrollment is attributable to increased pressures for college education in the country and the inability of colleges to provide both housing and other educational facilities in the face of the increase. North Carolina College students living in households have increased by 30 percent since 1960. Nevertheless, dormitory construction and a levelling off of enrollment in 1967 have meant that a greater proportion of the college students are living on campus than in 1960 (see table following). During the forecast period of this report, the number of students living in private housing is expected to remain unchanged at Duke University and decline sharply at North Carolina College with planned dormitory construction and only slight increases in enrollment.

A 224-unit married student housing project at Duke University consisting of 24 efficiencies, 168 one-bedroom units, and 32 two-bedroom apartments opened in the fall semester of 1962. Only graduate or professional students are eligible for occupancy and applications usually exceed the number of available units. Monthly rents are $70 for efficiencies, $90 for one-bedroom units, and $110 for two-bedroom apartments and generally include all utilities and furnishings (except the electricity utilized in operating an optional air conditioning unit). An 89-unit apartment project was purchased by Duke in the fall of 1966 to serve as the residence for graduate and professional women students. The two-bedroom units are furnished and are generally occupied by three students. Monthly rental rates are approximately $50 per student for apartments with three students and include utilities and furnishings. Although no graduate apartments are planned for construction or purchase during the forecast period, Duke plans to construct 300 units of married student housing if the present 224-unit project is sold to the Durham Housing Authority.

Students By Type of Residence
Durham, North Carolina, HMA
1960-1969

Type of residence	Duke University			North Carolina College		
	1960	1967	1969	1960	1967	1969
Dormitories[a/]	5,000	5,300	5,650	1,275	1,975	2,375
University-owned apartments	-	313	389	-	-	-
Private housing	537	2,194	2,161	854	1,111	825
Total[b/]	5,537	7,807	8,200	2,129	3,086	3,200
Percent living in private housing	9.7%	28.1%	26.4%	39.9%	36.0%	25.8%

a/ Includes fraternity houses at Duke University.
b/ Fall semester enrollment.

Sources: Registrar and Housing Offices, Duke University and North Carolina College.

Demand for Housing

Quantiative Demand

Based on the projected growth of 1,100 households annually and on the demolition of 450 units a year, there is an estimated annual demand for 1,550 new housing units, composed of 900 single-family units and 650 multifamily units for the November 1967-November 1969 forecast period. Consideration has been given to the level of new construction, to expected changes in tenure of occupancy, and to the 1967 vacancy level. The multifamily demand excludes public housing and rent-supplement accommodations but includes approximately 150 units that may be supplied at the lower rents achievable with below-market-interest-rate financing or assistance in land acquisition and cost.

The estimated annual demand for 900 single-family units from November 1967 to November 1969 is comparable to the peak volume of 900 units in 1965 and is a little above the average construction volume of 850 units annually during the 1962-1965 period. The low sales vacancy rate in 1967, especially among new units, suggests rapid absorption of new sales housing. Despite a somewhat lower level of household formations, demand will be bolstered by a level of demolition activity nearly double that of the 1960-1967 period.

The demand for 650 multifamily units annually over the forecast period is somewhat below the multifamily building volume of 1965 and 1966 when an average of 750 privately-financed units were authorized. While new rental housing produced in that period was marketed readily, the absorption of new rental units during the forecast period should be observed closely since demand will be sensitive to employment changes and to changing preferences in housing arrangements among students. The student population, particularly unmarried students who do not require family-type quarters, does not necessarily constitute a continuing source of demand for rental accommodations in housekeeping units. The following table presents demand by type of structure.

Annual Demand By Type of Structure
Durham, North Carolina, HMA
November 1967-November 1969

Type of structure	Number of units
Single-family	900
Multifamily:	
Privately-financed	500
With assistance	150
Total	1,550

The similarity of public housing income limits for families displaced by governmental action ($4,125) with those of the Section 221(d)(3) BMIR project for a one-person family ($4,100) indicates that housing provided under BMIR should be concentrated in two- three- and four-bedroom units.

Qualitative Demand

Single-family Units. The annual demand for 900 units of single-family sales housing is expected to approximate the pattern presented in the following table. The distribution of families by annual after-tax income and the proportion of income that area families typically pay for sales housing were used as a basis for estimation. Because of current construction and land costs, few if any adequate new sales houses can be built to sell for less than $10,000.

Single-family Demand By Sales Price
Durham, North Carolina, HMA
November 1967-November 1969

Sales price	Number	Percent
Less than $12,500	45	5
$12,500 - 14,999	115	13
15,000 - 17,499	140	15
17,500 - 19,999	160	18
20,000 - 24,999	170	19
25,000 - 29,999	180	20
30,000 and over	90	10
Total	900	100

The above distribution suggests a strong demand for new housing in the higher price ranges. About half (49 percent) of all sales housing demand is for units priced over $20,000. The bulk of the demand for homes priced above $30,000 will continue to be met by new construction in the west-southwest portion of Durham, while units priced in the $20,000-$30,000 range will continue to be added in new and existing subdivisions in north Durham.

Multifamily Units. The monthly rentals at which 500 privately-owned additions to the multifamily inventory that can be provided without public benefits or assistance are indicated by unit size in the following table. As the table indicates, demand is strongest in the two-bedroom size and is concentrated in lower rental ranges.

Estimated Annual Demand for Multifamily Units
Durham, North Carolina, HMA
November 1967-November 1969

	Unit size			
Gross monthly rent a/	One bedroom	Two bedroom	Three bedroom b/	Total units
$100 - $119	80	-	-	80
120 - 139	45	95	-	140
140 - 159	20	70	50	140
160 - 179	5	65	30	100
180 and over	-	20	20	40
Total	150	250	100	500

a/ Includes all utilities.
b/ Three bedrooms or more.

The preceding distribution of average annual demand for new apartments is based on projected tenant-family income, the size distribution of tenant households, and rent-paying propensities found to be typical in the area; consideration is also given to the recent absorption experience of new rental housing. Thus, it represents a pattern for guidance in the production of rental housing predicated on foreseeable quantitative and qualitative considerations. Specific market demand opportunities or replacement needs may permit effective marketing of a single project differing from this demand distribution. Even though a deviation may experience market success, it should not be regarded as establishing a change in the projected pattern of demand for continuing guidance unless thorough analysis of all factors involved clearly confirms the change.

Of the additional 150 multifamily units that can be marketed each year in the HMA at lower rents achievable with public benefits or assistance through subsidy, tax abatement, or aid in financing or land acquisition, only about 20 units can be marketed in the one-bedroom size. Two-bedroom apartments account for 70 units, and larger units of three bedrooms account for 60 units of the annual demand.

Table I

College Enrollment Trends
Durham, North Carolina, HMA
1950-1969

Fall semester	Enrollment: Duke	N.C.College	Total	Average annual change from preceding date: Duke	N.C. College	Total
1950	4,912	1,344	6,256	-	-	-
1960	5,537	2,129	7,666	62	79	141
1961	6,122	2,361	8,483	585	232	817
1962	6,345	2,483	8,828	223	122	345
1963	6,421	2,231	8,652	76	-252	-176
1964	6,695	2,651	9,346	274	420	694
1965	6,952	2,780	9,732	257	129	386
1966	7,392	3,184	10,576	440	404	844
1967	7,807	3,086	10,893	415	-98	317
Projected						
1969	8,200	3,200	11,400	197	57	254

Sources: Registrar and Housing Offices, Duke University and North Carolina College.

Table II

Nonagricultural Wage and Salary Employment By Industry
Durham, North Carolina, HMA
1960-1967

Industry	1960	1961	1962	1963	1964	1965	1966	12 months ending Sept. 1966	12 months ending Sept. 1967
Wage and salary	39,600	40,320	40,730	41,600	42,890	44,400	47,000	46,280	51,360
Manufacturing	13,050	12,740	12,460	12,330	12,170	12,150	12,400	12,340	14,410
Durable goods	1,540	1,500	1,560	1,500	1,330	1,360	1,820	1,760	4,390
Nonelec. machinery	NA	NA	80	130	180	210	270	250	2,430
Other	NA	NA	1,480	1,370	1,150	1,150	1,550	1,510	1,960
Nondurable goods	11,510	11,240	10,900	10,830	10,840	10,790	10,580	10,580	10,020
Tobacco	6,250	5,970	5,750	5,560	5,770	5,370	5,070	5,150	4,910
Textiles	3,430	3,290	3,150	2,980	2,760	3,120	3,240	3,130	3,260
Food & kindred prod.	1,170	1,160	1,140	1,160	1,130	1,100	1,070	1,000	1,080
Other	660	820	860	1,130	1,180	1,200	1,200	1,300	770
Nonmanufacturing	26,550	27,580	28,270	29,270	30,720	32,250	34,600	33,940	36,950
Contract construction	3,240	3,270	2,730	3,030	3,390	3,370	3,550	3,590	4,250
Trans., comm., util.	2,220	2,230	1,990	2,070	2,250	2,200	2,450	2,380	2,700
Fin., ins., real est.	1,850	1,980	2,200	2,230	2,250	2,330	2,540	2,490	2,680
Trade	7,020	6,840	6,640	6,810	7,160	7,430	7,750	7,650	7,840
Services	7,810	8,730	9,890	10,440	10,840	11,700	12,720	12,410	13,650
Government	4,160	4,270	4,480	4,550	4,740	5,100	5,450	5,290	5,720
Mining & other	250	260	340	140	90	120	140	140	110

Note: 1960-1964 data are based on estimates made on a bimonthly basis.
Columns may not add to total because of rounding.

Source: North Carolina Employment Security Commission.

Table III

Percentage Distribution of Families by After-tax Income
Durham, North Carolina, HMA
November 1967-November 1969

After-tax income	November 1967 All families	November 1967 Renter households[a/]	November 1969 All families	November 1969 Renter households[a/]
Under $ 3,000	18	27	16	23
$ 3,000 - 3,999	10	13	8	12
4,000 - 4,999	9	14	9	13
5,000 - 5,999	11	11	9	11
6,000 - 6,999	10	10	10	11
7,000 - 7,999	9	8	9	7
8,000 - 8,999	8	5	7	6
9,000 - 9,999	6	3	7	5
10,000 - 12,499	10	6	13	7
12,500 - 14,999	5	2	7	3
15,000 and over	4	1	5	2
Total	100	100	100	100
Median	$6,200	$4,725	$6,750	$5,150

[a/] Excludes one-person renter households.

Source: Estimated by Housing Market Analyst.

Table IV

Population and Household Trends
Durham, North Carolina, HMA
1950-1967

Population	April 1950	April 1960	November 1967	Average annual change 1950-1960	Average annual change 1960-1967[a]
City of Durham	71,311	78,302	97,850	699	2,575
Remainder of HMA	30,328	33,693	32,750	337	-125
Total	101,639	111,995	130,600	1,036	2,450
Households					
City of Durham	18,414	22,121	29,900	371	1,020
Remainder of HMA	7,685	9,107	9,150	142	5
Total	26,099	31,228	39,050	513	1,025

[a] Rounded.

Sources: 1950 and 1960 Censuses of Population and Housing
Estimates by Housing Market Analyst.

Table V

Occupancy and Vacancy Trends
Durham, North Carolina, HMA
April 1950-November 1967

Tenure and vacancy	April 1950	April 1960	November 1967
Total housing supply	26,917	32,994	40,050
Occupied housing units	26,099	31,228	39,050
Owner occupied	11,621	15,939	21,300
Percent	44.5%	51.0%	54.5%
Renter occupied	14,478	15,289	17,750
Percent	55.5%	49.0%	45.5%
Vacant housing units	818	1,766	1,000
Available vacant	351	1,065	700
For sale	138	225	100
Homeowner vacancy rate	1.2%	1.4%	0.5%
For rent	213	840	600
Renter vacancy rate	1.4%	5.2%	3.3%
Other vacant	467	701	300

Sources: 1950 and 1960 Censuses of Housing and estimates by Housing Market Analyst.

Table VI

Durham, North Carolina, Area Postal Vacancy Survey

November 3-7, 1967

Postal area	Total residences and apartments: Total possible deliveries	Vacant units: All	%	Used	New	Under const.
The Survey Area Total	47,171	601	1.3	491	110	807
Durham County						
Durham	36,147	505	1.4	418	87	603
Main Office	9,285	138	1.5	134	4	9
Stations:						
Duke	80	-	0.0	-	-	-
East Durham	5,291	80	1.5	58	22	25
Forest Hills	8,936	91	1.0	64	27	365
North Durham	5,083	83	1.6	71	12	52
West Durham	7,472	113	1.5	91	22	152
Orange County	11,024	96	0.9	73	23	204
Carrboro	1,312	6	0.5	3	3	51
Chapel Hill	8,249	73	0.9	53	20	145
Hillsborough	1,463	17	1.2	17	-	8

Postal area	Residences: Total possible deliveries	Vacant units: All	%	Used	New	Under const.
The Survey Area Total	37,251	437	1.2	353	84	252
Durham County						
Durham	28,365	351	1.2	287	64	195
Main Office	5,371	74	1.4	74	-	5
Stations:						
Duke	80	-	0.0	-	-	-
East Durham	4,664	51	1.1	43	8	23
Forest Hills	7,400	66	0.9	44	22	97
North Durham	4,987	79	1.6	67	12	52
West Durham	5,863	81	1.4	59	22	18
Orange County	8,886	86	1.0	66	20	57
Carrboro	1,103	3	0.3	3	-	1
Chapel Hill	6,320	66	1.0	46	20	48
Hillsborough	1,463	17	1.2	17	-	8

Postal area	Apartments: Total possible deliveries	Vacant units: All	%	Used	New	Under const.
The Survey Area Total	9,920	164	1.7	138	26	555
Durham County						
Durham	7,782	154	2.0	131	23	408
Main Office	3,914	64	1.6	60	4	4
Stations:						
Duke	-	-	-	-	-	-
East Durham	627	29	4.6	15	14	2
Forest Hills	1,536	25	1.6	20	5	268
North Durham	96	4	4.2	4	-	-
West Durham	1,609	32	2.0	32	-	134
Orange County	2,138	10	0.5	7	3	147
Carrboro	209	3	1.4	-	3	50
Chapel Hill	1,929	7	0.4	7	-	97
Hillsborough	-	-	-	-	-	-

Postal area	House trailers: Total possible deliveries	Vacant: No.	%
The Survey Area Total	959	15	1.6
Durham County			
Durham	488	9	1.8
Main Office	8	-	0.0
Stations:			
Duke	-	-	-
East Durham	97	-	0.0
Forest Hills	96	-	0.0
North Durham	131	8	6.1
West Durham	156	1	0.6
Orange County	471	6	1.3
Carrboro	6	-	0.0
Chapel Hill	358	6	1.7
Hillsborough	107	-	0.0

The distributions of total possible deliveries to residences, apartments, and house trailers were estimated by the postal carriers. The data in this table, therefore, are not strictly comparable to the distribution of deliveries by structural type for surveys prior to 1966. The total possible deliveries for the total of residences, apartments, and house trailers, however, are as recorded in official route records.

The survey covers dwelling units in residences, apartments, and house trailers, including military, institutional, public housing units, and units used only seasonally. The survey does not cover stores, offices, commercial hotels and motels, or dormitories; nor does it cover boarded-up residences or apartments that are not intended for occupancy.

The definitions of "residence" and "apartment" are those of the Post Office Department, i. e.: a residence represents one possible stop with one possible delivery on a carrier's route; an apartment represents one possible stop with more than one possible delivery.

Source: FHA postal vacancy survey conducted by collaborating postmaster(s).