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Analysis of the

FAYETTEVILLE, NORTH CAROLINA HOUSING MARKET

as of October 1, 1971

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

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Housing Market Analysis

Fayetteville, North Carolina, as of October 1, 1971

Foreword

This analysis has been prepared for the assistance and guidance of the Department of Housing and Urban Development in its operations. The factual information, findings, and conclusions may be useful also to builders, mortgagees, and others concerned with local housing problems and trends. The analysis does not purport to make determinations with respect to the acceptability of any particular mortgage insurance proposals that may be under consideration in the subject locality.

The factual framework for this analysis was developed by the Economic and Market Analysis Division as thoroughly as possible on the basis of information available on the "as of" date from both local and national sources. Of course, estimates and judgments made on the basis of information available on the "as of" date may be modified considerably by subsequent market developments.

The prospective demand or occupancy potentials expressed in the analysis are based upon an evaluation of the factors available on the "as of" date. They cannot be construed as forecasts of building activity; rather, they express the prospective housing production which would maintain a reasonable balance in demand-supply relationships under conditions analyzed for the "as of" date.

Department of Housing and Urban Development
Federal Housing Administration
Economic and Market Analysis Division
Washington, D. C.

FHA HOUSING MARKET ANALYSIS - FAYETTEVILLE, NORTH CAROLINA
AS OF OCTOBER 1, 1971

The Fayetteville Housing Market Area (HMA) is defined as Cumberland County, North Carolina. This definition is used also for the Fayetteville Standard Metropolitan Statistical Area. The HMA currently has an estimated population of 205,025. Fayetteville, the county seat, is located on the Cape Fear River, 60 miles south of Raleigh, North Carolina, and 90 miles northwest of Wilmington, North Carolina. Fayetteville currently has a population of about 52,900.

The military sector is of basic importance to the economy of the Fayetteville HMA, but there is an expanding civilian industrial sector. The military sector contributed to area economic growth throughout most of the 1960's, but declined abruptly over the last two years to a level which is projected to continue over the next two years. The civilian economy has expanded rapidly since 1965, and a number of new industries have developed. Despite a recent slow down, moderate growth is expected over the next two years. Household growth has been greatly reduced recently as a result of military cutbacks which are not expected to continue. However, the impetus to growth in the near future must arise entirely in the civilian sector of the population. Vacancy levels have risen over the last two years, despite reduced building activity. While the rate of household growth is expected to increase over the next two years, the current rate of construction should decline somewhat so as to reduce the high vacancy situation.

Anticipated Housing Demand

Based on current housing market conditions and on presently anticipated population and household growth trends, it is expected that there will be a demand for about 1,600 new nonsubsidized housing units annually in the Fayetteville HMA during the two-year forecast period from October 1971 to October 1973. Best absorption probably will result if production consists of 900 single-family houses, 300 units in multifamily structures, and an additional 400 units in mobile homes. The estimates for single-family and multifamily demand are below the current rates of construction because of the excess number of available vacancies. Distributions of demand for single-family houses by price class and for multifamily units by number of bedrooms and gross rents are shown in table I.

Anticipated growth in the number of mobile homes approximates recent experience. New mobile homes sell for \$4,000 to \$11,000. Most of them go into parks and suitable lots are available. It is estimated that about 40 percent of the mobile homes in the HMA are renter occupied. Typical gross monthly rent for new mobile homes is around \$145, but older ones can rent for considerably less.

Occupancy Potential for Subsidized Housing

Federal assistance in financing costs for new housing for low- or moderate-income families may be provided through a number of different programs administered by HUD: monthly rent supplements in rental projects financed under Section 221(d)(3); partial payment of interest on home mortgages insured under Section 235; partial interest payment on project mortgages insured under Section 236; and federal assistance to local housing authorities for low-rent public housing.

The estimated occupancy potentials for subsidized housing are designed to determine, for each program, (1) the number of families and individuals who can be served under the program and (2) the proportion of these households that can reasonably be expected to seek new subsidized housing during the forecast period. Household eligibility for the Section 235 and Section 236 programs is determined primarily by evidence that household or family income is below established limits but sufficient to pay the minimum achievable rent or monthly payment for the specified program. Insofar as the income requirement is concerned, all families and individuals with income below the income limits are assumed to be eligible for public housing and rent supplement; there may be other requirements for eligibility, particularly the requirement that current living quarters be substandard for families to be eligible for rent supplements. Some families may be alternatively eligible for assistance under more than one of these programs or under other assistance programs using federal or state support. The total occupancy potential for federally assisted housing approximates the sum of the potentials for public housing and Section 236 housing. For the Fayetteville HMA, the total occupancy potential is estimated to be 825 units annually (see table II).

The annual occupancy potentials^{1/} for subsidized housing discussed below are based upon 1971 incomes, the occupancy of substandard housing, estimates of the elderly population, income limits in effect on October 1, 1971, and on available market experience.

^{1/} The occupancy potentials referred to in this analysis have been calculated to reflect the strength of the market in view of existing vacancy. The successful attainment of the calculated potentials for subsidized housing may well depend upon suitably accessible location, as well as a distribution of rents and sales prices over the complete range attainable for housing under the specified programs.

Section 235 and Section 236. Subsidized housing for households with low to moderate incomes may be provided under either Section 235 or Section 236. Moderately-priced, subsidized sales housing for eligible families can be made available through Section 235. Subsidized rental housing for the same families may be alternatively provided under Section 236; the Section 236 program contains additional provisions for subsidized rental units for elderly couples and individuals. In the Fayetteville HMA, it is estimated (based on regular income limits) that, for the period October 1971-October 1973, there is an occupancy potential for an annual total of 320 subsidized family units utilizing either Section 235 or Section 236, or a combination of the two programs. In addition, there is an annual potential for about 45 units of Section 236 rental housing for elderly couples and individuals.

It is estimated that about 400 new houses have been insured under Section 235 in the HMA: two in 1969, 183 in 1970 and approximately 215 in the first nine months of 1971. In addition, about 167 existing houses have been insured under the program: one in 1969, 111 in 1970, and approximately 55 in the first nine months of 1971. Available evidence indicates that there is a concentration of excess sales vacancies in the \$15,000 to \$20,000 range. Therefore, new construction should not be encouraged through Section 235 and alternative methods of meeting the potential should be pursued.

There are 100 units of Section 236 housing for families in the HMA. The units are currently all occupied and there is a small waiting list. An application is in process for another 100-unit Section 236 project for families in the HMA, which would satisfy part of one year's occupancy potential for families. In view of the current nine percent vacancy rate for rental housing, approval of Section 236 proposals should be conservatively administered--superior locations and projects, competent management, and adequate absorption of previously approved projects.

Public Housing and Rent Supplement. These two programs serve households in essentially the same low-income group. The principal differences arise from the manner in which net income is computed for each program along with other eligibility requirements. For the Fayetteville HMA, the annual occupancy potential for public housing is 480 units for families and 65 units for the elderly. Under the more restrictive rent supplement program, the potential for families is about two-thirds of the above potential, and the potential for elderly would be unchanged.

There are currently 683 public housing units in the HMA, 512 of which were constructed in 1953 or before. None of these older units was designed specifically for the elderly. Within the last six months, 171 units of public housing have been completed in the HMA, 20 of which were designed specifically for the elderly. Nineteen of these recently completed units are leased and the remaining 152 were produced under the Turnkey program. It should be noted that some units not specifically designated for the elderly are elderly occupied. Currently, there are 202 units of public housing under construction, 48 under the Turnkey program and 154 under the leasing program. None of these units is specifically designed for the elderly. Most of these units are near completion. The units under construction should satisfy half of the occupancy potential for families for the first year of the forecast period. A chronically high vacancy situation

existed in public housing prior to 1969, reportedly due to management difficulties. Currently, there are no vacancies, and applications number about 900, including about 75 elderly.

In view of current high levels of rental vacancies, attention should be directed to leasing of existing housing for meeting public housing needs.

Sales Market

The sales market in the Fayetteville HMA is weak at the present time. At over three percent, the homeowner vacancy rate is higher than is desirable, and the January 1971 unsold inventory survey reported a substantial number of houses unsold for more than three months after completion.

The deterioration in the condition of the sales market dates from mid-1969, when there was a sharp cutback in military staffing at local installations as well as some slackening in the rate of expansion of the civilian economy. At that time, however, the impact of reduced demand on the sales market was moderated by the fact that tight money and high interest rates discouraged new residential construction. More recently, there has been an expansion of new construction, as financing conditions have eased, including the stimulus of Section 235 financing which has accounted for about 16 percent of new construction in the area since 1969.

About 80 percent of all construction is done on a speculative basis, and subdivision activity predominates. Most building is taking place in the north-northwest arc between Fayetteville and Fort Bragg. However, most of the over-\$30,000 building is in the northern part of Fayetteville. Little construction is taking place east of the Cape Fear River.

Currently, building is taking place in all price ranges, but is concentrated from \$17,000 to \$25,000. The weakest market appears to be from \$15,000 to \$20,000. Absorption appears to be good for houses priced above \$30,000. The weakest market for existing units is around \$16,000. The most concentrated vacancy situation is in less desirable houses in the southwest and southeast vicinity of Fayetteville. Also, vacancies in Spring Lake are quite high as a result of the military impact from nearby Fort Bragg.

An unsold inventory survey as of January 1, 1971, conducted by the Federal Housing Administration, covering 1,014 completions (85 percent of the total) during 1970, showed that of 64 houses unsold from three to 12 months after completion, 51 were in the \$15,000 to \$22,499 range, and that of 30 houses unsold for more than 12 months, 28 were priced below \$20,000. An unsold inventory survey dated January 1, 1969, covering 1,070 completions (60 percent of the total) during 1968, showed only 31 houses unsold for three to 12 months, and three houses unsold for more than 12 months.

Rental Market

Military and military-connected civilian households account for about 40 percent of the total number of households in the HMA and, since military families tend to prefer renting, they account for an even larger proportion of the households occupying rental housing. Recent declines in military

strength have had a sharp impact on the rental market as suggested by the current 9.0 percent vacancy rate. The market problem in less competitive rentals has been aggravated by the fact that new multifamily construction, although below the 1969 peak level, has continued at a relatively high rate.

However, more than half of the renter-occupied units are single-family houses, and this segment of the rental market is weaker than that for apartments. Vacancies in newer apartments are much lower than in any other segment of the rental market and absorption of new units has been generally adequate, but the tight situation of three years ago has disappeared. Waiting lists, prevalent at that time, have disappeared. Most of the newer units have been constructed in the northwest part of the county. New apartments are typically garden-type structures, renting for about \$160 to \$180 gross rent for a two-bedroom unit. Many units are offered furnished at an extra \$35 to \$45 a month.

Economic, Demographic, and Housing Factors

The estimated demand for new nonsubsidized housing is based on the trends in employment, income, population, and housing factors summarized below.

Employment. A primary economic influence in the Fayetteville HMA is the military reservation shared by Fort Bragg and Pope Air Force Base, located in northwest Cumberland County. Military and military-connected civilian employment directly support 40 percent of the households presently living in the HMA. The trend of military and civil service employment^{1/} on this reservation since 1960 is shown in table IV. This is a long-standing and relatively permanent military installation. Most of the short-term fluctuations in military strength levels have been comprised of single men living on-base in barracks-type facilities. However, these fluctuations have also involved some military and civilians who were living off-base, and this has had some impact on the economy.

From June 1960 to June 1965, total military and civil service strength rose from 35,600 to 44,700 with some wide fluctuation. After a decline of 2,700 uniformed military from June 1965 to June 1966 due to the Dominican Republic crisis, total military strength rose by 16,500 by June 1969, the great majority of which were single men living on-base in the army training center. From June 1965 to June 1969, civil service employment rose by 2,125. The impetus for this period of expansion was increased military activity in southeast Asia. From June 1969 to the present time, military and civil service employment has declined to pre-1967 levels, but most of the declines occurred during late 1970 and early 1971. From June 1969 to June 1970, total military and civil service strength declined by 4,150; whereas, during the next year declines amounted to about 9,050. Most of the recent declines are attributable to single men living on-base who left as the army training center was phased out. Over the next two years, further but only minor

^{1/} Does not include non-appropriated fund employees which currently number about 1,600.

reductions in military and civilian strength are anticipated. However, a change in unit strength levels or in the number of units assigned to the reservation by the Department of Defense could alter this forecast.

The civilian economy grew moderately at the beginning of the 1960's and has grown very rapidly since 1965. Nonagricultural wage and salary employment (see table III) increased by an average of about 1,425 a year (about 4.9 percent annually) from 1960 to 1965, and by an average of about 3,200 a year (about 7.9 percent annually) from 1965 to 1970. The largest increases occurred from 1966 to 1968 when increases averaged 4,285 a year. Nonagricultural wage and salary employment totaled 48,790 for the 12 months ending October 1, 1971, representing an increase of only 620 over the 12 months ending October 1, 1970. This increase is less than half as large as any yearly increase since 1961. It was caused by a leveling in nonmanufacturing employment, as manufacturing accounted for the increase.

Manufacturing employment currently totals 9,260, which is only 19 percent of total nonagricultural wage and salary employment in the HMA. However, manufacturing employment has been growing very rapidly since 1965 with gains averaging 830 a year. The peak growth year was 1969 with a gain of 1,050 jobs. Manufacturing employment grew by 640 from the 12 months ending October 1, 1970 to the 12 months ending October 1, 1971. The rapid growth since 1965 has been due mainly to the influx of six new manufacturing firms each employing over 300 persons, and the expansions of several other firms.

Growth in nonmanufacturing accounted for 91 percent of the growth in nonagricultural wage and salary employment from 1960 to 1965, but has accounted for 74 percent of the growth from 1965 to 1970. From 1966 to 1968, increases in nonmanufacturing averaged about 3,425 employees a year, compared to 1,525 a year from 1960 to 1966, and 1,600 a year from 1968 to 1970. Increases in government employment averaged 1,700 a year from 1965 to 1968, growing much faster than any other sector during that period. At least 40 percent of this growth in government employment was due directly to expansion of military employment during that time. From 1968 to the present time, military civil service employment has dropped by about 1,000, but total government employment has increased by about 610. From 1966 to the 12 months ending October 1, 1971, government employment has grown by 4,570 and trade by 3,540, together accounting for 84 percent of the total increase in nonmanufacturing during that period. However, for the 12 months from October 1, 1970 to October 1, 1971, nonmanufacturing employment did not grow because gains in trade and government were offset by declines in construction and services.

Over the next two years, nonagricultural wage and salary employment is expected to increase by about 1,825 a year. Manufacturing employment is expected to increase by about 725 a year. Most of the increase is expected in the "other" manufacturing, and metals and machinery categories. Considerable expansion is expected in at least three firms. Nonmanufacturing employment is expected to increase by about 1,100 a year. Growth is expected in government and trade, as construction and services recover from recent losses.

In 1971, it was estimated that the median annual income after deduction of federal income tax of all families in the Fayetteville area was \$7,125, and the median annual after-tax income for renter households of two or more persons was \$6,050. Detailed distributions of all families and renter households by 1971 and 1959 incomes are presented in table V.

Demographic Factors. As of October 1, 1971, the population of the Fayetteville HMA was estimated at 205,025, consisting of 98,250 military and their dependents, 10,050 military-connected civilians and their dependents, and about 96,725 nonmilitary-connected civilians (see table VI). It should be noted that according to estimates by Fort Bragg dated July 31, 1971, there were about 17,150 retired military personnel and their dependents living within 30 miles of Fort Bragg, many of whom would be in the Fayetteville HMA.

Total population has declined by about 7,025 since the April 1970 Census, mostly due to declines in single military men living on-base. The nonmilitary-connected civilian population grew moderately during this period, by about 4,225 persons. The greatest period of population growth since 1960 was around 1966 to 1969, when both the military and civilian sectors of the economy were expanding rapidly.

It is estimated that over the next two years, the population of the HMA will increase by about 1,625 persons annually. The military and military-connected civilian population is expected to decrease by about 1,475 annually, and the nonmilitary-connected civilian population is expected to increase by about 3,100 annually.

Currently, the population of the city of Fayetteville is estimated at 52,900, and that of the remainder of the county at 152,125 (see table VI). This represents a slight decline for the city since the 1970 Census, and a large decline for the county due to the recent military reductions. From April 1960 to April 1970, the county accounted for about 90 percent of the total population growth of the HMA. The city population grew by about 6,400 over this period, but as of April 1970, 11,490 persons lived in areas annexed to the city from the county since April 1960. Assuming reduced annexation impact, the population of the city would grow by about 265 a year over the next two years, while the population of the county grows by about 1,360 a year.

There are currently 52,800 households in the HMA, consisting of 31,600 civilian and 21,200 military and military-connected civilian households (see table VI). Although the number of military and military-connected civilian households declined by about 875 since April 1970, the number of civilian households increased by about 1,675, resulting in a net increase of only about 800 households, an annual rate of 530. This compares with an annual rate of growth of about 1,825 a year from April 1960 to April 1970, most of which occurred in the second half of the decade, and about 67 percent of which were nonmilitary-connected civilian households. The recent decline in military and military-connected civilian households has been abrupt, and is expected to continue at a much lower rate, declining only about 150 households a year over the next two years. Nonmilitary-connected civilian households are expected to increase by about 1,200 a year over the next two years--a net increase of 1,050 a year for all households.

The 800 net growth in the number of households in the HMA since April 1970 resulted from a decline in the city of Fayetteville of about 75, and an increase in the county of about 875 households (see table VI). This compared with average annual gains of 325 in the city and 1,500 in the county from April 1960 to April 1970. Over the two-year forecast period, the number of households in the city is expected to increase by about 175 a year and the county to increase by about 875 a year.

Housing Factors. The housing inventory of the HMA totaled 58,000 units in October 1971, an increase of about 1,150 since April 1970 (see table VII). The net gain resulted from the construction of about 1,600 units, the loss of 1,050 units through demolition and other causes and a net increase of about 600 mobile homes. There were 955 housing units under construction in the HMA in October 1971, including 525 single-family houses and 430 units in multifamily structures. The estimate of units under construction includes about 200 low-rent public housing units and approximately 70 single-family houses that will probably be insured under Section 235.

There are currently about 4,535 units of on-base military housing for families. The newest units were built in 1963 when 280 were constructed. No new units are anticipated over the forecast period.

The trend in residential housing starts since 1960, excluding military and subsidized multifamily units, is shown in table VIII. The trend was generally upward, declining only slightly in 1964, going from 1,565 units in 1960 to 2,704 units in 1965, the highest year in the period from 1960 to date. Construction dropped sharply in 1966, and dropped somewhat further to 1,995 in 1967, but rose to 2,389 by 1969. Construction dropped very sharply in 1970 to 1,675--comparable to the lowest years at the beginning of the 1960's. For the first nine months of 1971, construction starts totaled 1,533, including an estimated 215 new houses to be insured under Section 235.

Private unsubsidized multifamily construction accounted for about seven percent of total construction from 1960 through 1967, averaging 140 a year. In contrast, it has accounted for about one fourth of total construction from 1968 through 1970, averaging about 510 a year. Also, some older single-family structures have been converted to multifamily units over the 1960-1970 period. Multifamily construction rose sharply to 359 and 716 in 1968 and 1969, respectively, and then receded to 445 in 1970. Multifamily construction starts totaled 348 for the first nine months of 1971, approximating the 1970 rate. Single-family construction has declined every year, going from 2,512 in 1965 to 1,228 in 1970 (including 183 houses insured under Section 235). The largest decreases over the period occurred in 1966 and 1970. For the first nine months of 1971, single-family construction starts totaled 1,185, including 215 houses to be insured under Section 235, indicating an increased rate of unsubsidized and subsidized single-family construction.

In October of 1971, there were about 3,225 vacant housing units available in the Fayetteville HMA (see table VII). Of that total, 950 were available for sale, and 2,275 were available for rent, equal to homeowner and renter vacancy rates of 3.1 percent and 9.0 percent, respectively. The

highly transient nature of the military population of the HMA tends towards generally high vacancy rates. However, both sales and rental vacancies have increased over the last three years, and the current vacancy situation is considered excessive. Most of the available sales vacancies, according to 1970 Census data, are in the \$15,000 to \$20,000 range. The next price range for excess available vacancies appears to be \$20,000 to \$25,000. Most of the rental vacancies are in the lower than average priced units, below \$95 gross rent a month, and vacancies are lowest in newer apartments, renting above \$150 a month. The vacancy rate is high in single-family rentals, which comprise more than half of the renter-occupied units. The vacancy rate in new apartments is much lower than the overall rental vacancy rate, and reflects a fairly reasonable balance. Postal vacancy surveys taken in October 1967 and October 1971 indicated a rise in the vacancy rate for apartments from a very tight 3.0 percent to 6.4 percent over the period.

Table I

Estimated Annual Demand for Unsubsidized Housing
Fayetteville, North Carolina, Housing Market Area
October 1971 to October 1973

A. <u>Single-family Houses</u>		<u>Number of houses</u>	<u>Percent of total</u>		
<u>Sales price</u>					
Under	\$17,500	90			10
\$17,500 -	19,999	110			12
20,000 -	22,499	145			16
22,500 -	24,999	160			18
25,000 -	29,999	195			22
30,000 -	34,999	100			11
35,000 and over		<u>100</u>			<u>11</u>
Total		900			100

B. <u>Multifamily Units</u>					
<u>Monthly gross rents^{a/}</u>	<u>Efficiency</u>	<u>One bedroom</u>	<u>Two bedroom</u>	<u>Three bedroom</u>	
Under \$130	10	-	-	-	
\$130 - 159	-	85	-	-	
160 - 189	-	25	90	5	
190 - 219	-	5	35	10	
220 - 249	-	-	15	5	
250 and over	<u>-</u>	<u>-</u>	<u>10</u>	<u>5</u>	
Total	10	115	150	25	

^{a/} Gross rent is shelter rent plus the cost of utilities.

Table II

Estimated Annual Occupancy Potential for Subsidized Rental Housing
Fayetteville, North Carolina, Housing Market Area
October 1, 1971 to October 1, 1973

	<u>Section 236a/ exclusively</u>	<u>Eligible for both programs</u>	<u>Public housing exclusively</u>	<u>Total for both programs</u>
A. <u>Families</u>				
1 bedroom	40	15	65	120
2 bedrooms	105	30	155	290
3 bedrooms	75	10	120	205
4+ bedrooms	<u>40</u>	<u>5</u>	<u>80</u>	<u>125</u>
Total	260	60 ^{b/}	420 ^{b/}	740
B. <u>Elderly</u>				
Efficiency	10	15	30	55
1 bedroom	<u>10</u>	<u>10</u>	<u>10</u>	<u>30</u>
Total	20	25 ^{c/}	40 ^{c/}	85

^{a/} Estimates are based on regular income limits. The same families may be assisted with home purchases under Section 235.

^{b/} Approximately two-thirds of these families also are eligible under the rent supplement program.

^{c/} All of the elderly couples and individuals also are eligible for rent supplement payments.

Table III

Civilian Work Force Components
Fayetteville, North Carolina, Housing Market Area
(Annual averages, 1960-1971)^{a/}

Components	1960	1961	1962	1963	1964	1965	1966	1967	1968	1969	1970	12 mos. ending in Oct. 1970 Oct. 1971
Total work force	36,570	36,710	36,510	37,950	40,170	44,170	46,360	51,180	55,550	57,900	60,600	60,060 61,090
Unemployment	2,680	2,420	2,100	2,160	2,280	1,930	1,930	1,900	2,130	2,120	2,450	2,340 2,910
Percent of work force	7.3%	6.6%	5.8%	5.7%	5.7%	4.4%	4.2%	3.7%	3.8%	3.7%	4.0%	3.9% 4.8%
Total employment	33,890	34,290	34,410	35,790	37,890	42,240	44,430	49,280	53,420	55,780	58,150	57,720 58,180
Nonagric. wage & salary empl.	25,590	25,990	27,440	28,720	30,950	32,750	35,080	39,890	43,650	45,870	48,700	48,170 48,790
Manufacturing	4,000	3,800	3,980	4,000	4,470	4,670	5,210	6,090	6,960	8,010	8,820	8,620 9,260
Food	680	620	635	620	585	585	625	655	705	730	710	710 660
Textiles	1,360	1,310	1,355	1,375	1,405	1,505	1,615	1,655	1,755	1,870	1,940	1,900 1,920
Apparel	240	230	235	165	405	430	795	1,030	1,210	1,290	1,380	1,410 1,250
Metals & machinery	180	190	220	220	275	345	410	655	1,055	1,350	1,780	1,770 1,740
Other manufacturing	1,540	1,450	1,535	1,620	1,800	1,805	1,765	2,095	2,235	2,770	3,010	2,830 3,710
Nonmanufacturing	21,590	22,190	23,460	24,720	26,480	28,080	29,870	33,800	36,690	37,860	39,880	39,550 39,530
Construction	1,520	1,740	1,960	2,200	2,940	3,660	3,820	3,660	3,800	3,510	4,230	4,130 3,700
Trans., comm., & pub. util.	1,090	1,150	1,270	1,420	1,580	1,820	1,950	2,170	2,420	2,670	2,830	2,820 2,830
Trade	6,120	6,220	6,870	7,180	7,540	7,770	7,900	8,570	9,580	10,430	11,240	11,140 11,440
Fin., ins., & real estate	1,130	1,160	1,280	1,470	1,600	1,680	1,690	1,870	1,920	2,080	1,970	1,970 2,000
Service	3,670	3,810	3,910	4,210	4,370	4,430	4,680	4,820	5,190	5,300	5,280	5,360 5,140
Government	8,000	8,050	8,100	8,150	8,350	8,630	9,750	12,640	13,700	13,800	14,240	14,040 14,320
Other nonmanufacturing	60	60	70	90	100	90	80	70	80	70	90	90 100
All other nonagric. empl.	5,070	5,070	4,510	4,570	4,510	6,970 ^{b/}	6,910	7,110	7,720	7,920	7,530	7,620 7,570
Agricultural employment	3,230	3,230	2,460	2,500	2,430	2,520	2,440	2,280	2,050	1,990	1,920	1,930 1,820

^{a/} Number may not add to totals because of rounding.

^{b/} Method of calculation revised in 1965.

Source: Employment Security Commission of North Carolina.

Table IV

Military Strength and Civil Service Employment^{a/}
at Fort Bragg and Pope Air Force Base
1960-1971

<u>Year^{b/}</u>	<u>Total</u>	<u>Fort Bragg</u>		<u>Pope Air Force Base</u>	
		<u>Military</u>	<u>Civilian</u>	<u>Military</u>	<u>Civilian</u>
1960	35,608	30,573	2,261	2,499	275
1961	37,246	32,143	2,385	2,445	273
1962	47,979	42,704	2,637	2,376	262
1963	43,268	38,031	2,587	2,399	251
1964	43,511	37,572	2,590	3,098	251
1965	44,691	38,265	2,677	3,499	250
1966	42,760	34,785	3,378	4,278	319
1967	56,974	47,781	4,597	4,263	333
1968	60,057	50,844	4,851	4,019	343
1969	60,627	51,566	4,744	3,997	320
1970	56,466	47,897	4,301	3,937	331
1971	47,421 ^{c/}	38,818 ^{d/}	3,842 ^{e/}	4,174	587

^{a/} Does not include noncivil service civilian employment

^{b/} Except as indicated, figures are as of June of each year.

^{c/} Due to the unavailability of the June 1971 figures for Fort Bragg, this 1971 total is based on other months as noted.

^{d/} As of May 1971.

^{e/} As of March 1971.

Source: U. S. Department of Defense.

Table V

Percentage Distribution of All Families and Renter Households
by Estimated Annual Income After Deduction of Federal Income Tax
Fayetteville, North Carolina, Housing Market Area
1959 and 1971

<u>Annual income</u>	<u>1959</u>		<u>1971</u>	
	<u>All families</u>	<u>Renter households^{a/}</u>	<u>All families</u>	<u>Renter households^{a/}</u>
Under \$2,000	17	26	8	9
\$2,000 - 2,999	22	24	4	8
3,000 - 3,999	21	21	8	9
4,000 - 4,999	14	12	8	11
5,000 - 5,999	10	7	10	12
6,000 - 6,999	6	4	11	10
7,000 - 7,999	3	2	9	10
8,000 - 8,999	2	)	7	10
9,000 - 9,999	)	)	7	6
10,000 - 12,499	)	)4	11	5
12,500 - 14,999	)5	)	7	5
15,000 and over	)	)	10	5
Total	100	100	100	100
Median	\$3,525	\$3,025	\$7,125	\$6,050

^{a/} Excludes one-person renter households.

Source: Estimated by Housing Market Analyst.

Table VI

Population and Household Trends
Fayetteville, North Carolina, Housing Market Area
1960-1971

<u>Geographic components</u>	<u>April 1960</u>	<u>April 1970</u>	<u>October 1971</u>	<u>Average annual change</u>	
				<u>1960- 1970</u>	<u>1970- 1971</u>
HMA total population	<u>148,418</u>	<u>212,042</u>	<u>205,025</u>	<u>6,350</u>	<u>-4,675</u>
Fayetteville	47,106	53,510 ^{a/}	52,900	625 ^{a/}	-400
Remainder	101,312	158,532	152,125	5,725	-4,275
HMA total households	<u>33,856</u>	<u>52,000</u>	<u>52,800</u>	<u>1,825</u>	<u>530</u>
Fayetteville	12,898	16,097 ^{b/}	16,025	325 ^{b/}	-50
Remainder	20,958	35,903	36,775	1,500	580
<u>Demographic Components</u>					
HMA total population	<u>148,418</u>	<u>212,042</u>	<u>205,025</u>	<u>6,350</u>	<u>-4,675</u>
Civilian	62,018	92,492	96,725	3,050	2,800
Military-connected civilian ^{c/}	6,400	10,450	10,050	400	-275
Military ^{d/}	80,000	109,100	98,250	2,900	-7,200
HMA total households	<u>38,856</u>	<u>52,000</u>	<u>52,800</u>	<u>1,825</u>	<u>530</u>
Civilian	17,780	29,925	31,600	1,225	1,125
Military-connected civilian ^{c/}	1,775	3,225	3,150	150	-50
Military ^{d/}	14,300	18,850	18,050	450	-545

^{a/} As of April 1970 there were 11,490 persons in areas annexed from the county since April 1960.

^{b/} As of April 1970 there were about 3,425 households in areas annexed from the county since April 1960.

^{c/} Civilian head of households employed by the military, and their dependents.

^{d/} Military personnel and their dependents.

Sources: 1960 and 1970 Censuses and estimates by Housing Market Analyst.

Table VII

Housing Inventory, Tenure, and Vacancy
Fayetteville, North Carolina, Housing Market Area
1960-1971

	<u>April</u> <u>1960</u>	<u>April</u> <u>1970</u>	<u>October</u> <u>1971</u>
Total housing inventory	<u>36,531</u>	<u>56,864</u>	<u>58,000</u>
Total occupied	<u>33,856</u>	<u>52,000</u>	<u>52,800</u>
Owner-occupied	15,672	28,903	29,750
Percent of all occupied	46.3%	55.6%	56.3%
Renter-occupied	18,184	23,097	23,050
Percent of all occupied	53.7%	44.4%	43.7%
Vacant housing units	<u>2,675</u>	<u>4,864</u>	<u>5,200</u>
Available vacant	<u>1,265</u>	<u>2,959</u>	<u>3,225</u>
For sale	251	876	950
Homeowner vacancy rate	1.6%	2.9%	3.1%
For rent	1,014	2,083	2,275
Renter vacancy rate	5.3%	8.3%	9.0%
Other vacant ^{a/}	1,410	1,905	1,975

^{a/} Includes vacant units that are seasonal, dilapidated (counted in 1960 only), sold or rented awaiting occupancy, lacking one or more plumbing facility, and units held off the market.

Sources: 1960 and 1970 Censuses of Housing, and estimates by Housing Market Analyst.

Table VIII

Estimated Housing Starts
Fayetteville, North Carolina, Housing Market Area
1960-1971

Year	HMA total			Fayetteville			Remaindera/		
	Total	Single-family	Multi-family	Total	Single-family	Multi-family	Total	Single-family	Multi-family
1960	1,565	1,495	70	274	250	24	1,291	1,245	46 ^{b/}
1961	1,583	1,515	68	314	288	26	1,269	1,227	42
1962	2,020	1,888	132	400	346	54	1,620	1,542	78
1963	2,519	2,356	163	500	431	69	2,019	1,925	94 ^{c/}
1964	2,440	2,231	209	479	380	99	1,961	1,851	110
1965	2,704	2,512	192	511	425	87	2,193	2,087	106
1966	2,260	2,084	176	293	211	82	1,967	1,873	94
1967	1,995	1,862	133	314	291	23	1,681	1,571	110
1968	2,189	1,830	359	481	337	144	1,708	1,493	215
1969	2,389	1,673	716	556	260	296	1,833	1,413	420
1970	1,673	1,228	445	350	195	155 ^{d/}	1,323	1,033	290
1971 (9 mos.)	1,533	1,185	348	397	196	201 ^{e/}	1,136	989	147

^{a/} Includes Hope Mills and Spring Lake.

^{b/} Excludes 367 units of military housing.

^{c/} Excludes 280 units of military housing.

^{d/} Excludes 247 units of public housing, and 100 units of Section 236 housing.

^{e/} Excludes 126 units of public housing.

Note: Includes about 400 new houses insured under Section 235--two in 1969, 183 in 1970, and approximately 215 in the first nine months of 1971.

Sources: U. S. Bureau of the Census, Cumberland County Electrical Inspector, and estimates by Housing Market Analyst.

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