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1966

Analysis of the
**HINESVILLE, GEORGIA
HOUSING MARKET**

as of November 1, 1966

A Report by the
DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT
FEDERAL HOUSING ADMINISTRATION
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ANALYSIS OF THE
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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
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Summary and Conclusions

1. As of October 1966, nonagricultural wage and salary employment in the Hinesville Housing Market Area (HMA) was estimated at 2,790, an increase of 670 since October 1963. Most of the gain occurred over the last year, primarily because of civil service increases at Fort Stewart and the opening of A.C.S. Industries in nearby Walthourville. During the November 1966-November 1968 forecast period, employment in the HMA is expected to expand by about 400. Most of this gain will arise from additional employment at A.C.S. Industries and a new paper mill to be completed in mid-1968.
2. The November 1966 median annual income, after deduction of federal income tax, was about \$4,100 for all families. The median annual after-tax income of all renter households of two persons or more was \$3,500. Since 1959, the median income level in the Hinesville HMA has risen by about 21 percent.
3. As of November 1, 1966, the population of the area was about 18,200, an increase of about 3,725 since April 1960. During the 1950-1960 period, the population of the area increased from nearly 8,450 to over 14,475, or by 6,025 persons. Virtually all of the population gain since 1950 is attributed to the in-migration of military and military-connected civilians and their families. The periods of greatest population increase, therefore, have been the early 1950's and the June-November 1966 periods. Military personnel and military-connected civilians and their dependents totaled 9,025 persons, or 49.6 percent of the HMA population in November 1966. By November 1968, the total population is expected to reach 18,950, an average gain of 375 annually.
4. As of November 1966, households in the area totaled about 4,000, a gain of 575 since April 1960. During the 1950-1960 decade, the number of households in the area increased from 2,025 to about 3,425, nearly 140 annually. There were 1,725 military and military-connected civilian households in the area, or 43.1 percent of the total. By November 1968, it is expected that the number of households in the area will reach 4,200, a gain of 100 annually. Most of the increase will represent nonmilitary-connected households.
5. There were about 4,600 housing units in the Hinesville HMA in November 1966, representing a net addition to the housing stock of about 500 units since April 1960. This net gain resulted from the construction of about 425 new units, the addition of 100 trailers,

and the loss of some 25 units through demolition and other inventory changes. Of the 425 dwelling units built since 1960, 130 were private single-family units built in Hinesville, and 150 were private single-family units built outside the town limits. In addition, 16 units of two-family public housing have been constructed in Hinesville, and 130 units have been added at Fort Stewart. There were 30 private single-family units under construction in November 1966.

6. There were approximately 125 vacant, nondilapidated, nonseasonal housing units available in the Hinesville HMA in November 1966, 2.7 percent of the housing inventory. Of the total, 25 were available for sale, a homeowner vacancy rate of 1.1 percent; the remaining 100 were available for rent, a renter vacancy rate of 5.4 percent. Although the homeowner vacancy ratio increased slightly since 1960, the renter vacancy ratio declined substantially.
7. Based on the requirements to accommodate the anticipated net increase in the number of civilian households, the need to replace housing expected to be lost by demolition, and the shift of single-family units from the sales inventory to the rental inventory, there will be a demand by the nonmilitary-connected population for 110 units of new housing a year during the forecast period. Demand for new housing is expected to be entirely for single-family sales housing; demand for rental units is expected to be satisfied by existing rental units, excluding consideration of demand for low-rent public housing and rent-supplement accommodations.

Demand occasioned by military expansion may be temporary, and is excluded from the demand estimate. It appears that the current tight rental situation arising from the recent build-up at Fort Stewart is likely to continue during the forecast period unless there is a reduction of military strength.

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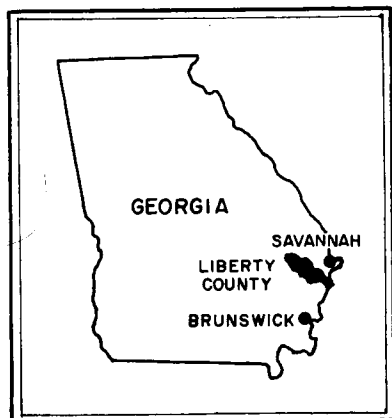
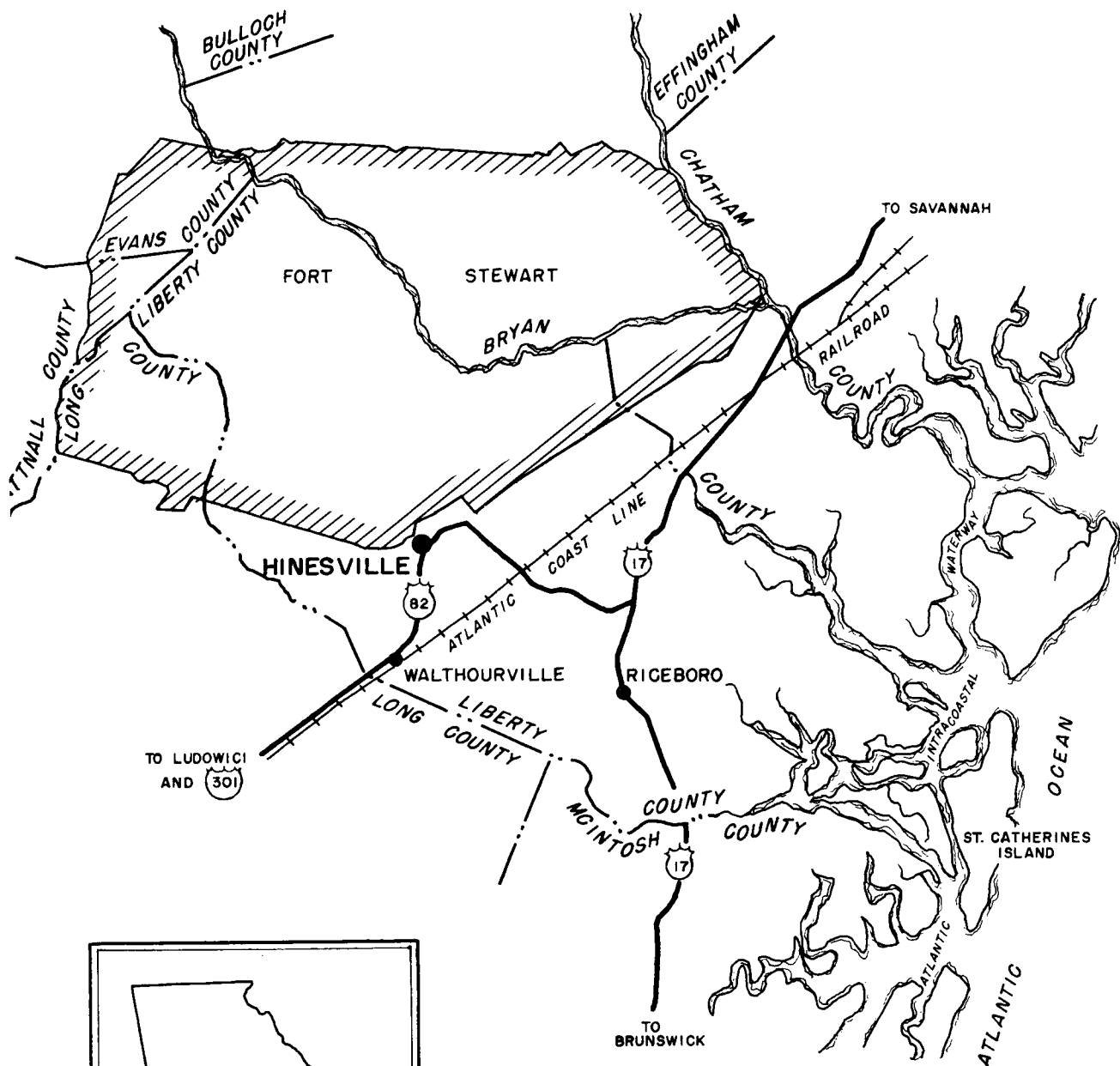
Housing Market Area

The Hinesville, Georgia, Housing Market Area (HMA) is defined as Liberty County (see map), which contained some 14,500 persons in April 1960. Hinesville, which had a 1960 population of 3,175, is the county seat and largest incorporated place in the area. Located near Georgia's Atlantic coast, Hinesville is 40 miles southwest of Savannah and 60 miles northwest of Brunswick. The HMA, with a land area of 510 square miles, is interspersed with forests in the western and central parts of the county, and rivers in the eastern portion.

Public transportation is provided by both Greyhound and Trailways Bus Lines; the Atlantic Coast Line Railroad supplies passenger service in Walthourville. Two principal north-south highways, U.S. Routes 17 and 301, are ten miles east and 15 miles west, respectively, of Hinesville, and are connected by U.S. Route 82 which passes through Hinesville.

Inasmuch as the rural farm population of the Hinesville HMA constituted only 2.5 percent of the total population in 1960, all demographic and housing data used in this analysis refer to the total of farm and nonfarm data.

HINESVILLE, GEORGIA, HOUSING MARKET AREA



Economy of the Area

Character and History

The fishing and timber industries characterized the economy of Liberty County prior to the opening of Fort Stewart in 1940. Since that time, nearly all of the area's growth has been directly related to activities at the post.

Employment

Current Estimate and Past Trend. Employment estimates are available for Liberty County for the month of October each year since 1963. As of October 1966, the Georgia State Employment Service estimated nonagricultural wage and salary employment in the Hinesville HMA at 2,790, including 220 manufacturing workers (7.9 percent of the total) and 2,570 employed in nonmanufacturing industries (see table I).

Between October 1963 and 1964, nonagricultural wage and salary employment increased by 80, only to decline by 110 during the following year. Between October 1965 and 1966, there was an increase of 700 nonagricultural wage and salary jobs, principally in nonmanufacturing industries, as shown in the following table.

Trend of Nonagricultural Wage and Salary Employment
Hinesville, Georgia, HMA
For the Month of October 1963-1966

<u>Date</u>	<u>Manu- facturing</u>	<u>Nonmanu- facturing</u>	<u>Total</u>	<u>Annual change</u>	
				<u>Number</u>	<u>Percent</u>
October 1963	150	1,970	2,120	-	-
" 1964	130	2,070	2,200	80	3.8
" 1965	100	1,990	2,090	-110	-5.0
" 1966	220	2,570	2,790	700	33.5

Source: Georgia State Employment Service.

Employment by Industry. Manufacturing employment totaled 150 in October 1963, then declined to 100 by October 1965 because of losses in durable goods employment. Between October 1965 and 1966, however, there was an increase of 120 manufacturing jobs in the area, of which 100 were in the nondurable goods category.

Employment in nonmanufacturing, which totaled 1,970 in October 1963, increased to 2,070 between 1963 and 1964. This net gain resulted from an increase of 130 in contract construction, which occurred when the Liberty

Memorial Hospital was being built, and from slight declines in transportation, communications, and utilities, trade, and services. During the next year, nonmanufacturing employment declined by 80, the result of losses in contract construction, trade, and government. Between October 1965 and 1966, there was an increase of some 580 jobs in nonmanufacturing. The bulk of this gain occurred in government which increased by 420 jobs because of civil service increments at Fort Stewart. A gain of 140 jobs occurred in transportation, communication, and utilities, when Coastal Utilities, Inc., a telephone company, was opened.

Fort Stewart

Fort Stewart covers an area of some 280,000 acres in five southeast Georgia counties. The cantonment area is located one mile north of Hinesville. Activated as an Anti-aircraft Artillery Training Center, Fort Stewart reached its peak strength (55,000) in 1943. The post was closed at the end of World War II, only to be reopened in 1950 to prepare anti-aircraft artillery units for the Korean conflict. In 1953, it was decided to conduct armor training concurrently with anti-aircraft artillery training and in 1956, the post was designated as a permanent army installation.

Currently, units of the regular army come to Fort Stewart from other army installations for range firing, tactical maneuvers, and army training tests. During the summer months, the post's primary mission is the training of reserve component troops. Because of the increased participation of the army in the Viet Nam conflict, activities at Fort Stewart have been expanded to include fixed wing flight training and helicopter gunnery courses. As a result, assigned military strength increased by over 1,550 between June 1966 and November 1966; civil service employment, which had averaged about 700 over the last three years, has increased by nearly 325.

Future plans call for Fort Stewart to be operated as a single installation with Hunter Air Force Base in Savannah after Hunter is turned over to the Department of the Army on April 1, 1967.

Fort Stewart is the largest employer in the area. As of November 1966, there were 3,240 assigned Army personnel stationed at Fort Stewart; in addition there were some 325 students temporarily attached to the post. Assigned military strength totals for June, as shown on the following page, have fluctuated. Because Fort Stewart is primarily a summer training center, it is not unusual for strength totals to vary from year to year. The increase of nearly 1,000 between September 1966 and November 1966 is unusual, however, and is the result of the build up resulting from the Viet Nam conflict.

Civilian civil service employment also has varied annually. The greatest increase, however, has occurred since June 1965; civil service personnel increased from 695 in June 1965 to 858 in September 1966 and to 1,023 in November 1966. A portion of this increase is attributed to recent changes which placed civilians in jobs previously filled by uniformed military personnel.

At this time, there is no information available concerning future military and civilian civil service personnel strength; any significant changes will depend on requirements of the Viet Nam conflict.

Assigned Military and Civilian Strength
United States Army Armor and Artillery Firing Center
Fort Stewart, Georgia
June 1960-November 1966

<u>Date</u>	<u>Assigned military strength</u>	<u>Civilian civil service</u>
June 1960	2,541	705
" 1961	2,533	695
" 1962	3,270	774
" 1963	3,108	706
" 1964	2,110	735
" 1965	2,177	695
September 1966	2,284	858
November 1966	3,240	1,023

Source: Department of the Army.

Unemployment

As of October 1966, 180 persons were unemployed in the Hinesville HMA, 5.0 percent of the civilian work force. As shown in table I, the unemployment rate reached a high of 8.0 percent in October 1963, but declined to 6.9 percent in 1964. In October 1965, there was a gain of only ten unemployed persons, but the unemployment rate increased to 7.5 percent because of a decline of 100 in the total work force.

Future Employment

During the two-year forecast period, an increase in civilian employment is expected at two local industries, totaling about 375 jobs. About 25 percent of the new jobs will be filled by unskilled laborers, some of whom will be drawn from the existing labor force and some of whom are expected to commute into the area from nearby counties.

Assuming little or no change from the current total of civil service employment at Fort Stewart, it is estimated that there will be an increase of about 400 nonagricultural wage and salary jobs in the area over the next two years. This total excludes contract construction employees who will be working on the two plant facilities; most of these will leave the area once construction is completed.

Income

The November 1966 median annual income, after deduction of federal income tax was about \$4,100 for all Hinesville area families. The median after-tax income of renter households (excluding one-person renter households) in the HMA was somewhat lower at \$3,500. Since 1959, the median level of income in the Hinesville HMA has risen by about 21 percent.

About 34 percent of all families and 42 percent of all renter households had after-tax incomes under \$3,000 annually. Approximately 19 percent of all families had annual after-tax incomes of \$7,000 and above; only 12 percent of all renter households were in this category.

Distributions of total families and of renter households by income classes for 1966 and 1968 are presented in table III. By 1968, it is expected that the median after-tax incomes will increase to \$4,300 for all families and \$3,700 for renter households of two or more persons.

Demographic Factors

Population

HMA Total. As of November 1, 1966, the population of the Hinesville HMA was about 18,200 (see table III), an increment of about 3,725 since April 1, 1960. During the April 1, 1950 to April 1, 1960 period, the population of the area increased from nearly 8,450 to over 14,475, or by 6,025 persons. Virtually all of the population gain that has occurred since 1950 can be attributed to the in-migration of military and military-connected civilian personnel and their families. The periods of greatest population increase, therefore, have been the early 1950's and the past six months of 1966.

Hinesville. The town of Hinesville had a population of 4,550 as of November 1, 1966, about 25 percent of the total population of the HMA, a gain of 1,375 since April 1960. During the 1950-1960 decade, the population of Hinesville increased by over 1,950, from about 1,225 in April 1950 to 3,175 in April 1960. It is estimated that approximately 85 percent of the military families living off post reside in Hinesville, as do about 50 percent of the military-connected civilian families.

Remainder of the HMA. The population of the portion of the HMA outside the corporate limits of Hinesville was estimated to be 13,650 as of November 1, 1966, a gain of some 2,325 since 1960. Between April 1950 and April 1960, the population increased from 7,225 to nearly 11,325, an increase of 4,100. The major source of population growth in this area has been the increase in the number of persons living on post at Fort Stewart, particularly nonhousehold population.

Military Population. As seen in the following table, the number of military personnel and their dependents and military-connected civilians and their dependents has increased substantially since 1960. Fort Stewart was inactive in April 1950.

Military and Civilian Components of Population
Hinesville, Georgia, HMA
April 1950-November 1966

<u>Components</u>	<u>April 1950</u>	<u>April 1960</u>	<u>November 1966</u>	<u>Change</u>	
				<u>1950-1960^{c/}</u>	<u>1960-1966^{c/}</u>
Nonmil.-conn. civ.	8,450	8,875	9,175	425	300
Mil.-conn. civ. ^{a/}	-	1,900	2,925	1,900	1,025
Military ^{b/}	-	3,700	6,100	3,700	2,400
Total ^{c/}	8,450	14,475	18,200	6,025	3,725

^{a/} Military-connected civilian employees and their families.

^{b/} Military personnel and their families.

^{c/} Rounded.

Sources: 1950 and 1960 Censuses of Population. Total population for 1966 and component data for all years estimated by Housing Market Analyst.

Military personnel and their dependents totaled 6,100 persons in November 1966, or 33.5 percent of the HMA population. This is an increase of some 2,400 persons above the total in April 1960 when military personnel and their families equaled only 25.6 percent of the total population. Military-connected civilian workers and their dependents currently total 2,925 (16.1 percent of total population), an increase of 1,025 over the April 1960 figure of 1,900 (13.1 percent).

Nonhousehold Population. Persons living in barracks at Fort Stewart account for virtually all of the population in group quarters (nonhousehold population) in the Hinesville HMA. In 1960, the census reported a nonhousehold population of 1,300 persons. Since then the increase in military activity has brought the number to 2,900 persons, or 15.9 percent of total population.

Future Population Growth. Population in the HMA is expected to reach 18,950 by November 1, 1968, an increase of 375 annually. All of this growth is expected to arise from the nonmilitary-connected civilian segment of the population as a result of the anticipated increase in employment. No information is available at present concerning projected military strength at Fort Stewart. If substantial increases or decreases in military and military-connected civilian population should occur in the forecast period, total population projections will have to be adjusted accordingly.

Natural Increase and Migration. Population change is the result of net natural increase (resident live births less resident deaths) and net migration. The following table shows the components of population change since 1950.

Components of Population Change
Hinesville, Georgia, HMA
April 1, 1950-November 1, 1966

<u>Source of change</u>	<u>April 1950- April 1960</u>	<u>April 1960- November 1966</u>
Net natural increase	3,340	1,650
Net migration	<u>2,703</u>	<u>2,075</u>
Total population change	6,043	3,725
Percent increase due to migration	44.7	55.7

Sources: 1950 and 1960 Censuses of Population; State of Georgia Department of Public Health; and estimates by Housing Market Analyst.

About 45 percent of the total population gain in the HMA during the 1950-1960 decade was attributable to in-migration. During the April 1960 to November 1966 period, in-migration accounted for approximately 56 percent of the population gain. The increasing rate of in-migration since 1960 is the result of the recent expansion at Fort Stewart.

Households

HMA Total. As of November 1, 1966, households in the Hinesville HMA totaled about 4,000 (see table III), an increment of 575 since April 1, 1960. During the April 1950 to April 1960 period, the number of households in the area increased from 2,025 to about 3,425, or by nearly 1,400. The increase of households between 1950 and 1960 reflects, in part, the change in census definition from "dwelling unit" in the 1950 Census to "housing unit" in the 1960 Census.

Nearly all of the household gain since 1950 can be attributed to the in-migration of military personnel and their families, and military-connected civilian workers and their families. The periods of greatest increase in the number of households were the early 1950's and the past six months of 1966.

Hinesville. As of November 1966, there were about 1,350 households in Hinesville (34 percent of the HMA total), representing a gain of over 375 since April 1960. During the 1950-1960 decade, the number of households in Hinesville increased by over 630, from 330 in April 1950 to over 960 in April 1960.

Remainder of the HMA. In the portion of the HMA outside the corporate limits of Hinesville, households number 2,650 currently, a gain of 200 since 1960. Between April 1950 and April 1960, households increased from 1,700 to about 2,450, an increase of 750 over the period.

Military Households. The following table presents the military and civilian components of households in 1950, 1960, and 1966.

Military and Civilian Components of Households
Hinesville, Georgia, HMA
April 1950-November 1966

<u>Components</u>	<u>April 1950</u>	<u>April 1960</u>	<u>November 1966</u>	<u>Change</u>	
				<u>1950-1960^{a/}</u>	<u>1960-1966^{a/}</u>
Nonmil.-conn. civ.	2,025	2,175	2,275	150	100
Mil.-conn. civ.	-	600	875	600	275
Military	-	650	850	650	200
Total ^{a/}	2,025	3,425	4,000	1,400	575

^{a/} Rounded

Sources: 1950 and 1960 Censuses of Housing. Total households for 1966 and components for all years estimated by Housing Market Analyst.

Based on information received from Fort Stewart, there are about 850 military households in the HMA currently, 21 percent of the area total. This is an increase of some 200 over the total in April 1960 when military households equaled only 19.0 percent of the total. Military-connected civilian households currently number 875 (21.9 percent of the total), an increase of 275 over the April 1960 figure of 600 (17.5 percent of the total). Nonmilitary-connected civilian household growth has been substantially less than that of the military-connected households.

Household Size Trends. Currently, the average household size in the Hinesville HMA is estimated to be 3.83 persons, or just slightly below the average of 3.85 in 1960.

The average household size of the military in the HMA is about 4.0 persons. The in-migration of the typically-large military households since 1950 has kept household size in the HMA well above the national average.

Future Household Growth. Based on the estimated 1968 population and on the household size trends evident in the area, it is anticipated that the number of households will reach 4,200 by November 1, 1968, a gain of 100 annually. It is expected that virtually all of this growth will be nonmilitary-connected households. It may be necessary to adjust this projection if substantial increases or decreases in military activity occur at Fort Stewart during the forecast period.

Housing Market Factors

Housing Supply

Current Estimate and Past Trend. There were about 4,600 housing units in the Hinesville HMA in November 1966, a net addition to the housing stock of about 500 units since April 1, 1960. The net addition resulted from the construction of about 425 new units (including 132 units of military housing), the addition of 100 trailers, and the loss of 25 units by demolition, fire, and other inventory changes. During the April 1950 to April 1960 decade, total housing units increased from nearly 2,250 to about 4,100, a gain of some 1,850. A part of this increase may have resulted from the census definitional change from "dwelling unit" in the 1950 Census to "housing unit" in the 1960 Census.

Type of Structure. About 92.4 percent of the housing inventory of the Hinesville HMA was in single-family houses in November 1966. This represents a slight reduction in the proportion of single-family structures in the housing inventory since April 1960 when the ratio was 93.6 percent. As indicated in the following table, the proportion of structures with two to four units increased since April 1960, whereas the proportion of structures with five units or more remained about the same.

Housing Inventory by Units in Structure
Hinesville, Georgia, HMA
April 1, 1960 and November 1, 1966

<u>Units in structure</u>	<u>April 1, 1960</u>		<u>November 1, 1966</u>	
	<u>Number</u>	<u>Percent</u>	<u>Number</u>	<u>Percent</u>
1 unit ^{a/}	3,831	93.6	4,250	92.4
2-4 units	135	3.3	210	4.6
5 units or more	128	3.1	140	3.0
Total	4,094	100.0	4,600	100.0

^{a/} Includes trailers.

Sources: 1960 Census of Housing.
1966 estimated by Housing Market Analyst.

Age of Structure. The housing inventory in the Hinesville area is relatively new, reflecting simultaneous growth with Fort Stewart. Nearly 80 percent of the total inventory has been built since 1940, and about 55 percent has been built since 1950.

Housing Inventory by Age of Structure
Hinesville, Georgia, HMA
November 1, 1966

<u>Year built</u> ^{a/}	<u>Number of units</u>	<u>Percentage distribution</u>
April 1960-November 1966	525	11.4
1959-March 1960	215	4.7
1955-1958	960	20.9
1950-1954	780	17.0
1940-1949	1,175	25.5
1930-1939	530	11.5
1929 or earlier	<u>415</u>	<u>9.0</u>
	4,600	100.0

a/ The basic data reflect an unknown degree of error in "year built" occasioned by the accuracy of response to census enumerators' questions as well as errors caused by sampling.

Sources: 1960 Census of Housing, adjusted to reflect additions and losses since 1960.

Condition of the Inventory. About 1,450 housing units (about 32 percent of the inventory) were dilapidated or lacked one or more plumbing facilities in November 1966. This was an improvement over the April 1960 ratio of 37 percent. The improving condition of the Hinesville housing inventory is the result of upgrading or demolition of some units of poor quality and the construction of new units.

Residential Building Activity

Past Trend. Accurate building permit data are not available in the HMA. Information concerning residential building activity was obtained from local builders and the office of the Hinesville Town Clerk, which has a record of building permits issued for Hinesville since 1962. Since 1960, an estimated 425 housing units have been constructed in the Hinesville area. Nearly 50 percent of these units have been built in the past two years. The total of 425 units is not the same as the net addition to the housing inventory since 1960 because of demolitions and trailers placed in the area. Of the 425 units, 130 were private single-family units built in Hinesville and 150 were private single-family units built outside the town limits. In addition, 16 units of two-family public housing have been constructed in Hinesville, and 130 units (both single-family and duplex structures) have been added at Fort Stewart.

Units Under Construction. On the basis of the postal vacancy survey conducted at the end of October and on local observation, it is estimated that there were 30 single-family units under construction in November 1966.

Tenure of Occupancy

Current Estimate and Past Trend. There has been a decided trend toward renter-occupancy in the Hinesville area since 1950 (see table IV). The proportion of renter-occupied units to total occupied units has risen from 30.4 percent in 1950 to 44.3 percent in 1960, and to 46.2 percent as of November 1966. About 2,150 units in the HMA were owner-occupied and 1,850 were renter-occupied. The 16-year trend toward renter-occupancy has been caused principally by the large influx of military-connected families, most of whom desire to rent.

Vacancy

1960 Census. There were nearly 290 nondilapidated, nonseasonal vacant available housing units in the Hinesville HMA in April 1960, equal to 7.0 percent of the total inventory. Of these, about ten were available for sale, a homeowner vacancy rate of 0.6 percent; the remaining 280 were available for rent, a renter vacancy rate of 15.4 percent (see table IV). Of the available units, about eight of the sales units and 42 of the rental units were lacking one or more plumbing facilities. Homeowner and renter vacancy ratios of 0.6 percent and 22.7 percent, respectively, were reported in the town of Hinesville in 1960. The high rental vacancy ratio in the area is a reflection of a decrease in military households at that time.

Postal Vacancy Survey. A postal vacancy survey was conducted in the town of Hinesville on October 27, 1966. The survey covered 1,165 total possible deliveries, or about 25 percent of the current housing inventory (see table V). According to postal definition, a "residence" is a unit representing one stop for one delivery of mail. All dwelling units in Hinesville conform to this definition and are listed as residences in the survey. About 45 percent of these units, however, are rented.

The survey reported a total of 20 vacant units, 1.7 percent of all residences covered. Of these, 15 were used and five were new units. In addition, a total of 22 units were reported to be under construction. Also counted in the survey were 210 house trailers, all of which were occupied. No apartments were listed because they have individual mail deliveries and, accordingly, are listed as residences by postal definition.

It is important to note that 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 delineation, 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). These are principally single-family homes, but include row houses, and some duplexes and structures with additional units created by conversion. An "apartment" is a unit on a stop where more than one delivery of mail is possible. Postal surveys omit vacancies in areas (such as major parts of Liberty County) served by post office boxes and tend to omit units in subdivisions under construction. Although the postal vacancy survey has obvious limitations, when used in conjunction with other vacancy indicators, the survey serves a valuable function in the derivation of estimates of local market conditions.

Current Estimate. On the basis of the postal vacancy survey and vacancy data available locally, there were an estimated 125 vacant, nondilapidated, nonseasonal housing units available in the Hinesville HMA in November 1966, equal to 2.7 percent of the inventory. Of the 125 available vacancies, 25 were available for sale, a homeowner vacancy rate of 1.1 percent; the remaining 100 were available for rent, a renter vacancy rate of 5.4 percent. Although the homeowner vacancy ratio increased slightly since 1960, the renter vacancy ratio declined substantially. This tightening of the rental market occurred in the six months prior to November 1966, as the number of military personnel in the area increased.

Sales Market

General Market Conditions. Because military personnel are interested principally in short-term occupancy, strength fluctuations at Fort Stewart have only slight effect on sales housing conditions in the HMA. In November 1966, the sales market appeared to be in balance. Most of the new residential construction is located in Hinesville or just outside the town limits. Although most of the homes are built on scattered individual sites, there are active subdivisions located in the southwest section of Hinesville.

The market for new sales housing has become relatively active during the last three years. This activity has not been prompted by increased personnel at Fort Stewart, however; the majority of the new homes are occupied by civilians and Army retirees. Most of this new residential building in the Hinesville area has been speculative. Few builders start more than two or three units at a time, however, and have little difficulty with sales. There is no problem in the sale of older properties in good condition. As an indication of the soundness of the market, there have been only three foreclosures of FHA-insured properties in the HMA since 1960.

Rental Market

General Market Conditions. Prior to the start of the recent military build up, rental vacancies in the area were considered excessive. Since the spring of 1966, however, the rental housing situation has become tight. In Hinesville and in the nearby area, almost all acceptable vacant rental units and many unacceptable ones have been occupied. The majority of the 100 available rental units in the HMA are beyond reasonable commuting distance to Fort Stewart.

Rents for efficiencies in the area range from \$50 (furnished, including water and sewage only) to \$60 (furnished, all utilities). One-bedroom apartments rent for about the same; two-bedroom units range from \$50 to \$70; and three-bedroom units start at \$70. Unfurnished apartments rent for \$5 to \$15 less. In June 1966, the Liberty County Chamber of Commerce established a housing office to take inquiries and direct persons to available housing. The office reports many inquiries, but few vacancies within the twenty-five mile radius it has covered.

Public Housing

Currently, there are 30 public low-rent federally-aided housing units in Hinesville, all of which are occupied. The City of Hinesville Housing Authority is making tentative plans for additional public housing, but no other information is available at present.

Military Housing

Currently, there are 594 units of family housing at Fort Stewart, of which 464 are Capehart units and 130 are appropriated-fund quarters. As of October 31, 1966, 581 of the units (98 percent) were occupied. No additional military family housing is expected to be constructed at Fort Stewart during the forecast period.

Demand for Housing

Quantitative Demand

Based on an estimated civilian household increase of 100 a year, a slight adjustment for demolitions, and the shift of single-family houses from the sales inventory to the rental inventory, the demand for new housing by the nonmilitary-connected population during the two-year period from November 1, 1966 to November 1, 1968 is expected to total 110 units a year, all of which will be for single-family sales housing. Although substantial employment growth is expected in Riceboro, most of the sales demand will be concentrated in Hinesville and the surrounding area because of the existing shopping and school facilities. Demand for rental housing during the forecast period by nonmilitary-connected civilian households is expected to be satisfied by existing rental units, primarily older single-family houses, excluding consideration of demand for low-rent public housing and rent-supplement accommodations.

Demand occasioned by military expansion will be temporary, and therefore is isolated from the long-term permanent growth of the community. There is very little inclination on the part of local builders to construct rental housing in the area because of the uncertainty of future demand by military personnel. Therefore, the current tight rental housing situation arising from the recent build-up at Fort Stewart is likely to continue throughout the forecast period unless there is a reduction of military strength in the area.

Qualitative Demand

Single-family Housing. The distribution of the annual demand for 110 units of new single-family sales housing is shown in the following table. The distribution is based on the ability to pay, as measured by current family income, and the ratio of income to purchase price found to be typical in the Hinesville HMA, and on recent market experience. Adequate single-family sales housing cannot be produced to sell below \$8,000.

Annual Demand for Single-family Sales Housing by Price Class
Hinesville, Georgia, HMA
November 1, 1966 to November 1, 1968

<u>Sales price</u>	<u>Total demand</u>		<u>Nonwhite demand</u>	
	<u>Number</u>	<u>Percent</u>	<u>Number</u>	<u>Percent</u>
\$ 8,000 - \$ 9,999	20	18	10	33
10,000 - 11,999	20	18	10	33
12,000 - 13,999	15	14	5	17
14,000 - 15,999	10	9	(5	(17
16,000 - 17,999	10	9	((
18,000 - 19,999	10	9	((
20,000 - 24,999	15	14	((
25,000 and over	10	9	((
Total	110	100	30	100

Table I

Civilian Work Force Components
Hinesville, Georgia, HMA
For the Month of October 1963-1966

<u>Components</u>	<u>1963</u>	<u>1964</u>	<u>1965</u>	<u>1966</u>
Total work force	<u>3,000</u>	<u>3,050</u>	<u>2,950</u>	<u>3,610</u>
Unemployment	240	210	220	180
Percent unemployed	8.0%	6.9%	7.5%	5.0%
Agricultural employment	110	110	110	110
Nonagricultural employment	<u>2,650</u>	<u>2,730</u>	<u>2,620</u>	<u>3,320</u>
Wage and salary	<u>2,120</u>	<u>2,200</u>	<u>2,090</u>	<u>2,790</u>
Manufacturing	<u>150</u>	<u>130</u>	<u>100</u>	<u>220</u>
Durable goods	120	100	70	90
Nondurable goods	30	30	30	130
Nonmanufacturing	<u>1,970</u>	<u>2,070</u>	<u>1,990</u>	<u>2,570</u>
Contract construction	30	160	120	80
Trans., comm., and utilities	80	70	70	210
Trade	360	340	320	330
Finance, ins., and real estate	20	20	20	20
Services	150	140	140	190
Government	1,300	1,310	1,290	1,710
Other nonmanufacturing	30	30	30	30
Other nonagricultural	530	530	530	530

Source: Georgia State Employment Service.

Table IV

Components of the Housing Supply
Hinesville, Georgia, HMA
April 1950 - November 1966

<u>Components</u>	<u>April 1950</u>	<u>April 1960</u>	<u>November 1966</u>
Total housing supply	<u>2,239</u>	<u>4,094</u>	<u>4,600</u>
Occupied housing units	<u>2,027</u>	<u>3,423</u>	<u>4,000</u>
Owner-occupied	1,411	1,908	2,150
Percent	69.6%	55.7%	53.8%
Renter-occupied	616	1,515	1,850
Percent	30.4%	44.3%	46.2%
Vacant housing units	<u>212</u>	<u>671</u>	<u>600</u>
Available vacant	<u>44</u>	<u>287</u>	<u>125</u>
For sale	5	11	25
Homeowner vacancy rate	0.4%	0.6%	1.1%
For rent	39	276	100
Renter vacancy rate	6.0%	15.4%	5.4%
Other vacant ^{a/}	168	384	475

^{a/} Includes seasonal units, vacant dilapidated units, units sold or rented and awaiting occupancy, and units held off the market.

Sources: 1950 and 1960 Censuses of Housing.
1966 estimated by Housing Market Analyst.

Table V

Hinesville, Georgia, Area Postal Vacancy SurveyOctober 27, 1966

Postal area	Total residences and apartments						Residences						Apartments						House trailers		
	Total possible deliveries	Vacant units				Under const.	Total possible deliveries	Vacant units				Under const.	Total possible deliveries	Vacant units				Under const.	Total possible deliveries	Vacant	
		All	%	Used	New			All	%	Used	New			All	%	Used	New			No.	%
Hinesville	1,165	20	1.7	15	5	22	1,165	20	1.7	15	5	22	-	-	-	-	-	-	210	-	0.0

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).