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Analysis of the
VALLEJO-NAPA, CALIFORNIA
HOUSING MARKET

as of March 1, 1970

**DEPARTMENT OF HOUSING
AND URBAN DEVELOPMENT**

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

July 1970

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Foreword

This analysis has been prepared for the assistance and guidance of the Federal Housing Administration 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 Field Market Analysis Service 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
U.S. Federal Housing Administration
Field Market Analysis Service
Washington, D. C.

FHA HOUSING MARKET ANALYSIS
VALLEJO-NAPA, CALIFORNIA, HOUSING MARKET AREA
AS OF MARCH 1, 1970

The Vallejo-Napa, California, Housing Market Area (HMA) is defined as Solano and Napa counties, and is coterminous with the Vallejo-Napa Standard Metropolitan Statistical Area (SMSA) as defined by the Bureau of the Budget in October 1963. The HMA, with a population of 263,400 as of March 1, 1970, is located in the San Francisco Bay Area between the two large metropolitan areas of San Francisco-Oakland and Sacramento. Both Solano and Napa counties are served by an excellent system of modern freeways and highways which provide easy access in all directions. The HMA is characterized by three major population concentrations which include the areas of Vallejo-Benicia and Fairfield-Vacaville-Suisun in Solano County, and the city of Napa in Napa County.

The economy of the Vallejo-Napa area is heavily dependent upon the operations at three military installations located in Solano County-- Mare Island Naval Shipyard, Travis Air Force Base, and Skaggs Island Naval Security Group. The local civilian economy derives its basic economic support from services, trade, state and local government, and tourism. The two county area is increasingly serving as a bedroom community for the Bay Region, reflecting the relatively high cost of land in other counties of the Bay Area and the extensive network of freeways and highways covering the HMA which facilitate

commutation. As a result of the moderate expansion of the local civilian economy over the past several years and of increased out-migration from the San Francisco-Oakland metropolitan area to the HMA, the market for both sales and rental units was strong as of March 1970.

Anticipated Housing Demand

Taking into consideration the limited expansion of the Vallejo-Napa economy expected for the next two years, current supply-demand relationships, and the anticipated loss of units through demolition and other causes, there will be a demand for 1,925 new nonsubsidized housing units a year during the period from March 1, 1970 to March 1, 1972. The most desirable supply-demand relationship would be achieved if annual construction volume included about 1,125 single-family houses and 800 units in multifamily structures. Annual demand distributions for single-family houses by price classes and for multifamily units by gross monthly rents are shown in tables I and II, respectively.

Of the annual anticipated demand for 1,125 single-family houses, 725 are in Solano County and 400 are in Napa County. The expected annual demand for 800 multifamily units includes 575 in Solano County and 225 in Napa County.

Primarily as a result of the anticipated reduction in personnel strength at the major military installations of the HMA, the projected annual volume of 1,925 new nonsubsidized units during the next two years is significantly below the average construction volume of 2,425 units a year recorded during the 1960-1968 period. The adverse effect of military-connected employee reductions on the direction of demographic changes and housing requirements should be softened, however, by increased in-migration of nonmilitary-connected families to the HMA and by a moderate level of out-migration of military-connected civilian households. Many of the military-connected civilian employees whose jobs will be terminated during the next two years are expected to maintain their residences in the HMA and secure employment in other labor markets outside the two county area. The demand estimates are not intended to be predictions of short-term construction volume, but rather are intended to indicate levels of construction designed to provide stability in the housing market based on long-term growth trends evident in the area.

Occupancy Potential for Subsidized Housing

Federal assistance in financing costs for new housing for low- or moderate-income families may be provided through four different programs administered by FHA--monthly rent-supplement payments,

principally in rental projects financed with market-interest-rate mortgages insured under Section 221(d)(3); partial payments for interest for home mortgages insured primarily under Section 235; partial payment for interest for project mortgages insured under Section 236; and below-market-interest-rate financing for project mortgages insured under Section 221(d)(3).

Household eligibility for federal subsidy programs is determined primarily by evidence that household or family income is below established limits. Some families may be alternatively eligible for assistance under one or more of these programs or under other assistance programs using federal or state support. Since the potential for each program is estimated separately, there is no attempt to eliminate the overlaps among program estimates. Accordingly, the occupancy potentials discussed for the various programs are not additive. Furthermore, future approvals under each program should take into account any intervening approvals under other programs which serve the same requirements. The potentials^{1/} discussed in the following paragraphs reflect estimates unadjusted for housing provided or under construction under alternative FHA or other programs.

The annual occupancy potentials for subsidized housing in FHA programs discussed below are based upon 1970 incomes, on the occupancy of substandard housing, on estimates of the elderly population, on most recent income limits, and on available market experience.^{2/} Distributions of the potentials by size of units required are presented in table III. The distribution of the annual occupancy potential for families by counties is roughly 75 percent in Solano County and 25 percent in Napa County; the elderly population is approximately 45 percent in Solano County and 55 percent in Napa County.

Section 221(d)(3) BMIR. If federal funds are available, a total of 310 units of Section 221(d)(3) BMIR housing could be absorbed annually during the next two years in the Vallejo-Napa HMA.^{3/} To date, three projects with a total of 414 units have been constructed

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

^{2/} Families with incomes inadequate to purchase or rent unsubsidized housing generally are eligible for one form or another of subsidized housing. However, little or no housing has been provided under some of the subsidized programs and absorption rates remain to be tested.

^{3/} At the present time, funds for allocations are available only from recaptures resulting from reductions, withdrawals, and cancellations of outstanding allocations.

in the city of Vallejo. Although a high rate of turnover has been evidenced during the past year as a result of the rotation of military personnel at Mare Island, the projects generally have experienced excellent rates of absorption.

Rent-Supplement Housing. The annual occupancy potential for rent-supplement units in the Vallejo-Napa HMA between March 1, 1970 and March 1, 1972 is estimated at 60 units for families and 275 units for elderly individuals and couples. Generally, families and individuals eligible for rent-supplements also are eligible for public low-rent housing. Approximately 15 percent of the total families and 25 percent of the total elderly individuals and couples eligible under rent-supplement housing also are eligible for Section 236 housing. There has been no housing constructed in the HMA under the rent-supplement program.

As of March 1, 1970, there were approximately 520 public low-rent housing units in the HMA, including 450 family units and 70 units designed specifically for elderly occupants. The annual occupancy potential for public low-rent housing units during the next two years is estimated at 220 units for families and 285 units for elderly individuals and couples. In March 1970, there were 30 public low-rent family housing units under construction in the Vallejo-Napa HMA. If these units are marketed during the March 1970-March 1971 period, the first year occupancy potential for public low-rent family housing units would be reduced to 190 units. In addition, the rent-supplement family potential would be reduced by approximately 30 percent.

Section 235, Sales Housing. Sales housing could be provided for low - to moderate-income families under Section 235. Utilizing exception income limits, it is estimated that there is an annual occupancy potential for 260 units under the provisions of Section 235; utilizing regular income limits the potential would be about 40 percent of that number. All of the families in the potential for Section 235 housing also are part of the potential estimated below for Section 236 housing; the estimates for these programs are not additive. The extent to which the potential may be satisfied through new construction will depend on several factors, including the propensity for homeownership among eligible families and the availability of sites convenient to employment sources, transportation, and shopping facilities. A total of 35 units have been financed in the city of Vallejo under this program.

Section 236, Rental Housing. Utilizing exception income limits, the annual occupancy potential under Section 236 in the HMA is estimated at 390 units, including 260 units for families and 130 units for elderly individuals and couples. If regular income limits are used, the potential would be about 40 percent of the annual family potential and about 75 percent of the elderly potential. Although less than five percent of the families eligible under this program

also are eligible for rent-supplements, about 50 percent of the elderly individuals and couples are eligible for rent-supplements. Because of identical income limits, families eligible under Section 236 also are eligible for Section 235 housing; the two are not additive. As of March 1, 1970, no housing had been constructed in the HMA under Section 236.

The Sales Market

The market for new and existing sales housing in the Vallejo-Napa HMA was moderately strong as of March 1, 1970. Although the March 1970 homeowner vacancy rate of 1.8 percent seems relatively high compared with other areas of northern California, the high level of military turnover, especially at Travis Air Force Base, coupled with moderate population and household growth indicate that the rate is consistent with long-term trends evident in the area. A July 1969 unsold inventory survey conducted by the San Francisco FHA Insuring Office indicates that 90 percent of new single-family houses completed in subdivisions with five or more completions during the July 1968-June 1969 period were sold before the end of the period, compared with only 83 percent in similar surveys covering houses built during the January 1967-December 1967 and January 1968-December 1968 periods. Used homes in the HMA usually remain on the market for a period of forty-five to ninety days--partly reflecting the tight money situation prevalent in the mortgage market.

A major factor in the strong sales market in the HMA is the comparatively higher cost of new homes in the neighboring counties of the Bay Region. As indicated by the July 1969 unsold inventory survey, the median price of a new house constructed during the July 1968-June 1969 period was \$28,000 in the San Francisco-Oakland Metropolitan area, compared with the median price of only \$22,500 in the Vallejo-Napa HMA. This price advantage in Solano and Napa Counties has attracted many families whose incomes are from employment in other parts of the Bay Area.

The sales market in Solano County has remained strong over the past several years. Most new construction has been concentrated in the central portion of the county, in the area which encompasses the cities of Fairfield, Vacaville, and Suisun. Primarily because of conservative financing practices in this area, the number of unsold houses in new subdivisions remains small. Most of the unsold inventory exists in the city of Fairfield in subdivisions which characteristically have been occupied by military or military-connected households. New houses in the central portion of the county generally range in price from \$17,000 to \$25,000. Some limited single-family construction activity has occurred in the cities of Vallejo and Benicia, with new houses ranging in price from \$19,000 to \$24,000 in Vallejo and from \$25,000 to \$35,000 in Benicia.

The sales market for new houses in Napa County is strong. Builders' unsold inventories are small and the majority of new homes, priced between \$20,000 and \$29,000, have been absorbed after short periods of market exposure.

Although there exists a limited excess number of used homes available for sale, most of these units are priced above \$35,000 and constitute only a relatively small portion of total demand in the county.

The Rental Market

The market for both single-family rental houses and apartments was tight as of March 1, 1970. The most recent additions to the rental inventory typically have been in garden and four-plex buildings with one- and two-bedroom units with gross monthly rents starting at about \$150 and \$170, respectively. Property management firms report that occupancy during the past year in their projects has averaged about 97 to 98 percent, and most units have been rented soon after completion.

The rental market in Solano County has remained quite strong during the past several years. As a result of extensive demolition activity of old, dilapidated World War II multifamily units during the past two years, the market for older less desirable apartments has strengthened during the past year; however, this portion of the market remains weak. Of the estimated 900 available vacant units in Solano County as of March 1, 1970 (a rental vacancy rate of 3.8 percent) approximately 25 percent were in the older and inferior quality apartments. These units were located in the city of Suisun and in scattered sections of the city of Fairfield.

Concentrations of apartments in Solano County have been constructed in the cities of Vallejo, Fairfield, and Vacaville. Generally, new rental units in all locations have attained successful occupancy levels after short periods of market exposure. Rental demand for new apartment units created by newly-formed households and in-migration of nonmilitary-connected families who, typically, have been in the market for rental housing, has more than offset the decline in rental demand by military households.

The market for rental units in Napa County is exceptionally tight, and the supply of adequate rental accommodations at all rent levels is limited. Virtually all of the apartment units constructed in Napa County have been in the city of Napa.

Economic, Demographic, and Housing Factors

The estimated demand for 2,425 new nonsubsidized housing units a year during the next two years is based on the trends in employment, income, population, and housing factors summarized below.

Employment. Total nonagricultural employment averaged 74,200 during 1969, reflecting an increase of 800 over the average recorded during 1968 (see table IV). Nonmanufacturing employment increased by 1,100 between these two years, offsetting a loss of about 400 in manufacturing employment. The gain in nonmanufacturing occurred mainly in services (700) and trade (300). Most of the increase in services represented a continued expansion in medical and other health services.

The average gain in total nonagricultural employment between 1968 and 1969 is significantly below the average annual increment of 2,375 recorded during the 1960-1968 period. Primarily as a result of decreases in federal government employment and in durable goods manufacturing, employment growth during the past year has slowed. The decline in federal government employment between 1968 and 1969 was principally due to a reduction of civil service personnel associated with the major military installations of the HMA; most of the reduction occurred during the latter part of 1969. The decline in durable goods manufacturing was due to a cutback in heavy pipe production. Although the rate of non-agricultural employment growth has declined during the 1968-1969 period, the effect of the decline on the local economy of the HMA has been largely offset by increased commutation to neighboring employment centers.

Changes in total nonagricultural employment since 1960 have been irregular. Primarily because of substantial growth in the government sector of the economy, nonagricultural employment increased by 2,100 between 1960 and 1961. During the 1961-1964 period, nonagricultural employment increased by an average of only 1,225 a year, but subsequently rose by an annual average of 3,275 during the 1964-1968 period. Most of the growth during the latter period was concentrated in government, which increased by an annual average of 1,500, in services (500), and in trade (500).

Military. There are three major defense installations in the Vallejo-Napa HMA--Mare Island Naval Shipyard, Travis Air Force Base, and Skaggs Island Naval Security Group. As of June 30, 1969, the consolidated assigned military strength of all the installations was approximately 14,700, compared with 16,900 one year earlier. Civil service civilian employees totaled 14,200 in June 1969, compared with a total of 14,100 in June 1968.

During the period from June 30, 1960 to June 30, 1969, consolidated assigned military strength ranged from a low of about 11,100 in both June 1960 and June 1961 to a high of approximately 17,100 in June 1967. During the same nine-year period, civil service civilian employees fluctuated from a low level of 11,950 in June 1964 to a high of about 14,200 in June 1969 (see table V). Based on the latest announcement by the Department of Defense, military and civil service personnel strength at the three installations is expected to decrease by about 3,000 by March 1972.

Outlook. During the next two years, nonagricultural employment is expected to increase by an average of 700 workers annually. About 90 percent of the increase will be concentrated in the nonmanufacturing sector of the economy. Because of continued in-migration to the HMA by families whose main place of employment is in neighboring counties, increments in nonmanufacturing are expected to occur in services, trade,

and state and local government. New manufacturing employment prospects during the next two years in the HMA appear extremely limited at this time. Most of the manufacturing employment potentials either are three or four years away or exist outside the HMA in adjoining counties.

Income. In March 1970, the median annual income of all families (including military) in the Vallejo-Napa HMA was about \$8,900, after deduction of federal income taxes. The median after-tax income of renter households of two or more persons (including military) was \$7,550 a year. The 1970 after-tax incomes compare with the 1959 median incomes of \$5,800 for all families and \$4,925 for renter households of two or more persons. Detailed distributions of all families and renter households by 1959 and 1970 income classes are presented for Solano and Napa Counties in table VI.

Population and Households. As of March 1, 1970, the population of the Vallejo-Napa HMA was approximately 263,400, reflecting an average annual increase of 6,350 since April 1, 1960 (see table VII). The March 1970 population included approximately 79,500 military and military-connected persons, an increase of about 700 persons a year since April 1960.^{1/} Approximately 73 percent of the total population growth since 1960 occurred in Solano County. The total population of this area was approximately 180,600, indicating an average increase of 4,650 persons a year. The March 1970 population of Napa County totaled about 82,800, reflecting an average annual increase of approximately 1,700 since 1960.

Based on the prospects of limited economic growth and on anticipated high levels of in-migration to the HMA, it is estimated that the population of the two-county area will increase by an average of 5,000 persons annually (3,500 in Solano County and 1,500 in Napa County) during the next two years, reaching a level of 273,400 by March 1, 1972. During the March 1970-March 1972 period, the anticipated loss of 3,400 military and military-connected persons a year is likely to be offset by an annual nonmilitary population gain of 8,400 persons. Part of the expected gain in the nonmilitary population during the next two years will result from a shift of the military-connected population to nonmilitary status. Many of the civil service personnel whose jobs at Mare Island will be terminated during the next two years are expected to remain in the HMA with their families and secure employment in neighboring counties.

There were about 80,575 households in the Vallejo-Napa HMA as of March 1, 1970, an average annual increase of 2,350 since April 1960. Of the 80,575 households, approximately 21,050 were military or

^{1/} Includes uniformed military personnel and their dependents, and civil service employees working at the three defense installations in the HMA and their dependents.

military-connected^{1/} and 59,525 were nonmilitary-connected, reflecting average annual increments since April 1960 of 225 and 2,125, respectively. The total number of households in the HMA included about 54,700 in Solano County and 25,875 in Napa County. During the next two years, it is anticipated that the number of households in the HMA will increase by an average of 1,800 a year; 1,200 of the annual gain will be in Solano County and 600 in Napa County. Military and military-connected households are expected to decrease by 925 a year, while nonmilitary households are expected to increase by about 2,725 a year. For the reason indicated in the population section above, a portion of the expected increment in nonmilitary-connected households during the next two years will reflect a transfer of military-connected households to the nonmilitary household category.

Residential Construction and Housing Inventory. As measured by building permits issued, which cover the entire HMA, residential construction has varied from year to year throughout the 1960's (see table VIII). Single-family house construction rose from a total of 887 houses in 1960 to 1,839 in 1961, but subsequently fell to 1,406 in 1962. Between 1962 and 1964, single-family housing construction increased each year, rising to a total of 1,993 houses in 1964 (the highest level for the 1960's). Between 1965 and 1968, single-family construction volume remained relatively stable with an average of 1,425 units a year. Primarily because of an exceptionally tight mortgage market, single-family houses authorized dropped for the first eleven months of 1969. Multifamily construction in the HMA rose each year between 1960 and 1964, from a total of 309 units in 1960 to a peak of 1,224 in 1964. During the subsequent four-year period, multifamily construction dropped to an average of 921 units a year. For the first eleven months of 1969, multifamily permits totaled 577, partly reflecting the tight credit conditions prevalent throughout the United States.

Generally, the annual variations in the construction volume in the HMA since 1960 have occurred in Solano County. Total construction volume in Solano County ranged from a low of 824 units in 1960 to a high for the 1960-1968 period of 2,400 units in 1964. For the first eleven months of 1969, a total of 1,035 units have been authorized. In contrast to Solano County, construction volume in Napa County has been relatively stable since 1960. Between 1960 and 1968, residential construction volume averaged over 700 units a year and authorization for the first eleven months of 1969 totaled 738 units.

As of March 1, 1970, there were approximately 85,275 housing units in the Vallejo-Napa HMA, reflecting an increase of 22,200 over the April 1, 1960 inventory of about 63,075. The increase during the last ten years

^{1/} Includes households with uniformed military or military-connected civil service head.

resulted from the addition of 23,100 units through new construction and conversions, the addition of 1,500 trailers, and the loss of 2,400 units through demolition and other causes. There were approximately 900 units under construction on March 1, 1970, including about 600 single-family units (350 in Solano County and 250 in Napa County) and 300 units in multifamily structures (200 in Solano County and 100 in Napa County). The March 1, 1970 inventory in the HMA included 57,400 housing units in Solano County (an increase of 15,500 since April 1960) and 27,875 units in Napa County (a gain of 6,700 since April 1960). Of the 57,400 housing units in Solano County, approximately 2,220 were located at Travis AFB, 480 at Mare Island, and 85 at Skaggs Island. The housing units at Travis AFB included 1,150 Capehart units, 980 Wherry units, 40 appropriated fund housing units, and 50 owner-occupied trailers. All of the housing units located at both Mare Island and Skaggs Island were appropriated-fund units.

Vacancy. There were 4,700 vacant housing units in the Vallejo-Napa HMA as of March 1, 1970, including 900 units available for sale, 1,100 units available for rent, and 2,700 units either unsuitable or unavailable (see table IX). The current available vacant sales and rental units represent vacancy ratios of 1.8 percent and 3.5 percent, respectively, compared with corresponding ratios of 2.2 percent and 8.9 percent in April 1960. The March 1970 sales vacancy levels in Solano and Napa counties were 1.8 percent and 1.6 percent, respectively. Rental vacancy levels in March 1970 were 3.8 percent in Solano County and 2.5 percent in Napa County.

Table I

Estimated Annual Demand for New Nonsubsidized Single-family Houses
Vallejo-Napa, California, HMA
March 1, 1970-March 1, 1972

<u>Sales Price</u>	<u>Vallejo-Napa HMA</u>	<u>Solano County</u>	<u>Napa County</u>
Under \$17,500	105	80	25
\$17,500 - 19,999	170	110	60
20,000 - 22,499	195	120	75
22,500 - 24,999	245	165	80
25,000 - 29,999	200	125	75
30,000 - 34,999	135	80	55
35,000 and over	<u>75</u>	<u>45</u>	<u>30</u>
Total	1,125	725	400

Source: Estimated by Housing Market Analyst.

Table II

Estimated Annual Demand for New Nonsubsidized Multifamily Housing
Vallejo-Napa California, HMA
March 1, 1970 - March 1, 1972

Location and size of unit	Gross monthly rent ^{a/}								Total
	<u>120-139</u>	<u>140-159</u>	<u>160-179</u>	<u>180-199</u>	<u>200-219</u>	<u>220-239</u>	<u>240-259</u>	<u>260 and over</u>	
<u>Vallejo-Napa, California HMA</u>									
Efficiency	25	15	-	-	-	-	-	-	40
One bedroom	-	185	70	30	15	5	-	-	305
Two bedrooms	-	-	90	130	80	45	20	20	385
Three or more bedrooms	-	-	-	-	15	25	10	20	70
<u>Solano County</u>									
Efficiency	20	10	-	-	-	-	-	-	30
One bedroom	-	125	50	25	10	5	-	-	215
Two bedrooms	-	-	65	90	55	35	15	20	280
Three or more bedrooms	-	-	-	-	10	15	5	20	50
<u>Napa County</u>									
Efficiency	5	5	-	-	-	-	-	-	10
One bedroom	-	60	20	5	5	-	-	-	90
Two bedrooms	-	-	25	40	25	10	5	-	105
Three or more bedrooms	-	-	-	-	5	10	5	-	20

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

Source: Estimated by Housing Market Analyst.

Table III

Estimated Annual Occupancy Potential for Subsidized Housing^{a/}
Vallejo - Napa, California, HMA
March 1, 1970 - March 1, 1972

A. Subsidized Sales Housing, Section 235

<u>Eligible family size</u>	<u>Number of units^{b/}</u>
Four persons or less	175
Five persons or more	<u>85</u>
Total	260

B. Privately-financed Subsidized Rental Housing

<u>Unit size</u>	<u>Rent-supplement</u>		<u>Section 236</u>	
	<u>Families</u>	<u>Elderly</u>	<u>Families</u>	<u>Elderly</u>
Efficiency	-	235	-	90
One bedroom	10	40	45	40
Two bedrooms	25	-	110	-
Three bedrooms	15	-	80	-
Four or more bedrooms	<u>10</u>	<u>-</u>	<u>25</u>	<u>-</u>
Total	60	275	260	130

^{a/} The distribution of the annual occupancy potential for families by submarket areas is roughly 75 percent in Solano County and 25 percent in Napa County; the elderly distribution is approximately 45 percent in Solano County and 55 percent in Napa County.

^{b/} All of the families eligible for Section 235 housing also are eligible for Section 236 housing, and vice versa, but the two are not additive. The estimates are based upon the exception income limits established by legislative authority; under regular income limits the potential would be about 40 percent of that number.

Table IV

Civilian Work Force Components
Vallejo-Napa, California, HMA
1960 - 1969

(Annual averages in thousands) ^{a/}

	<u>1960</u>	<u>1961</u>	<u>1962</u>	<u>1963</u>	<u>1964</u>	<u>1965</u>	<u>1966</u>	<u>1967</u>	<u>1968</u>	<u>1969</u>
Total civilian labor force	<u>64.2</u>	<u>66.2</u>	<u>66.9</u>	<u>68.0</u>	<u>69.8</u>	<u>72.0</u>	<u>76.9</u>	<u>79.8</u>	<u>81.3</u>	<u>82.4</u>
Unemployment	3.5	3.7	3.7	4.1	3.7	3.4	3.4	3.3	3.2	3.7
Rate	5.5%	5.6%	5.5%	6.0%	5.3%	4.7%	4.4%	4.1%	3.9%	4.5%
Total employment	<u>60.7</u>	<u>62.5</u>	<u>63.2</u>	<u>63.9</u>	<u>66.1</u>	<u>68.5</u>	<u>73.5</u>	<u>76.5</u>	<u>78.1</u>	<u>78.7</u>
Agricultural employment	6.2	5.9	5.7	5.4	5.8	5.2	5.3	4.8	4.7	4.5
Total nonagricultural employment	<u>54.5</u>	<u>56.6</u>	<u>57.5</u>	<u>58.5</u>	<u>60.3</u>	<u>63.3</u>	<u>68.2</u>	<u>71.7</u>	<u>73.4</u>	<u>74.2</u>
Manufacturing	<u>5.2</u>	<u>5.3</u>	<u>5.1</u>	<u>4.9</u>	<u>5.2</u>	<u>5.6</u>	<u>6.6</u>	<u>6.8</u>	<u>7.4</u>	<u>7.0</u>
Nondurable goods	<u>3.1</u>	<u>3.0</u>	<u>3.2</u>	<u>3.1</u>	<u>3.2</u>	<u>3.2</u>	<u>3.8</u>	<u>4.1</u>	<u>4.3</u>	<u>4.3</u>
Food	2.0	1.9	2.0	2.0	2.0	2.0	2.6	2.8	2.9	2.7
Other nondurables ^{b/}	1.2	1.1	1.1	1.0	1.1	1.2	1.3	1.4	1.5	1.6
Durable goods	2.1	2.3	2.0	1.8	2.0	2.4	2.8	2.7	3.1	2.7
Nonmanufacturing	<u>49.4</u>	<u>51.3</u>	<u>52.5</u>	<u>53.6</u>	<u>55.0</u>	<u>57.8</u>	<u>61.5</u>	<u>64.9</u>	<u>66.1</u>	<u>67.2</u>
Construction	2.5	2.8	2.9	3.2	3.2	3.2	3.0	2.9	3.2	3.1
Public utilities	2.5	2.5	2.7	3.0	2.9	3.1	3.4	3.7	3.7	3.8
Trade	9.7	9.9	10.2	10.7	11.4	11.9	12.5	13.0	13.3	13.6
Finance, insurance, and real estate ^{c/}	1.5	1.6	1.8	2.0	2.0	2.2	2.2	2.2	2.2	2.2
Services	9.1	9.4	9.7	10.4	11.0	11.5	12.2	12.8	13.0	13.7
Government ^{d/}	23.8	24.8	24.9	24.0	24.2	25.6	27.9	29.9	30.3	30.5
All other nonmanufacturing ^{e/}	.3	.3	.3	.3	.3	.3	.3	.4	.4	.3

^{a/} Industry averages may not add to subtotals and totals because of rounding.

^{b/} Includes textiles, apparel, paper, printing, chemicals, petroleum, rubber, and leather.

^{c/} Excludes operative builders.

^{d/} Includes all civilian employees of federal, state, and local government regardless of the activity in which the employee is engaged.

^{e/} Includes mining, forestry, and miscellaneous agricultural services.

Source: State of California, Department of Human Resources Development.

Table V

Military and Civilian Personnel Strength
Vallejo-Napa, California, HMA
June 30, 1960 - June 30, 1969

	<u>Total all installations</u>			<u>Travis Air Force Base</u>			<u>Naval Security Group Activity ^{b/}</u>		
	<u>Total</u>	<u>Assigned</u>	<u>Civil service</u>	<u>Total</u>	<u>Assigned</u>	<u>Civil service</u>	<u>Skaggs Island</u>		
		<u>military personnel</u>	<u>civilian employees</u>		<u>military personnel</u>	<u>civilian employees</u>	<u>Assigned</u>	<u>Civil service</u>	
June 30, 1960	24,763	11,145	13,618	11,283	9,719	1,564	-	-	-
June 30, 1961	25,262	11,124	14,138	11,461	9,724	1,737	-	-	-
June 30, 1962	26,758	12,695	14,063	12,997	10,935	2,062	-	-	-
June 30, 1965	28,332	15,483	12,849	14,987	12,813	2,174	-	-	-
June 30, 1964	27,779	15,842	11,937	15,332	13,082	2,250	-	-	-
June 30, 1965	29,429	16,978	12,451	15,890	13,723	2,167	-	-	-
June 30, 1966	28,699	15,893	12,806	15,669	13,168	2,501	-	-	-
June 30, 1967	30,785	17,052	13,733	16,432	13,619	2,813	-	-	-
June 30, 1968	31,026	16,919	14,107	15,679	12,623	3,056	-	-	-
June 30, 1969	28,966	14,730	14,236	12,868	10,227	2,641	-	-	-
	<u>San Francisco Naval Shipyard</u>			<u>Benicia Army Arsenal ^{a/}</u>			<u>Naval Security Group Activity ^{b/}</u>		
	<u>Total</u>	<u>Assigned</u>	<u>Civil service</u>	<u>Total</u>	<u>Assigned</u>	<u>Civil service</u>	<u>Skaggs Island</u>		
<u>military personnel</u>		<u>civilian employees</u>	<u>military personnel</u>		<u>civilian employees</u>	<u>Assigned</u>	<u>Civil service</u>		
June 30, 1960	10,958	1,394	9,564	2,522	32	2,490	-	-	-
June 30, 1961	11,532	1,360	10,172	2,269	40	2,229	-	-	-
June 30, 1962	12,516	1,718	10,798	1,245	42	1,203	-	-	-
June 30, 1963	13,003	2,649	10,354	342	21	321	-	-	-
June 30, 1964	12,447	2,760	9,687	-	-	-	261	243	18
June 30, 1965	13,278	3,012	10,266	-	-	-	351	316	35
June 30, 1966	12,679	2,409	10,270	-	-	-	432	396	36
June 30, 1967	13,921	3,037	10,884	-	-	-	412	375	37
June 30, 1968	14,935	3,921	11,014	-	-	-	404	367	37
June 30, 1969	15,694	4,136	11,558	-	-	-	-	-	-

^{a/} Deactivated January 1, 1964.

^{b/} Activated January 1, 1965.

Source: Department of Defense.

Table VI

Estimated Percentage Distribution of All Families and Renter Households
by Annual Income After Deduction of Federal Income Tax
Vallejo-Napa, California, HMA 1959 and 1970

Annual after-tax income	Vallejo - Napa HMA				Solano County				Napa County			
	1959		1970		1959		1970		1959		1970	
	All families	Renter ^{a/} households	All families	Renter ^{a/} households	All families	Renter ^{a/} households	All families	Renter ^{a/} households	All families	Renter ^{a/} households	All families	Renter ^{a/} households
Under \$3,000	16	21	7	10	16	21	7	10	15	20	6	9
\$3,000 - 3,999	10	14	5	7	11	15	6	8	9	12	5	6
4,000 - 4,999	12	16	6	9	13	16	7	9	12	16	5	7
5,000 - 5,999	15	17	7	9	16	16	7	9	14	18	6	9
6,000 - 6,999	13	11	8	11	12	11	9	11	14	12	8	10
7,000 - 7,999	11	9	9	11	10	8	9	11	11	9	8	10
8,000 - 8,999	7	5	9	10	7	5	9	10	8	5	9	10
9,000 - 9,999	6	3	9	8	6	3	9	8	6	3	9	9
10,000 - 12,499	5	2	17	13	4	3	16	13	5	2	18	16
12,500 - 14,999	2	1	12	7	2	1	11	7	2	2	13	8
15,000 - 19,999	{ 3	{ 1	8	{ 5	{ 3	{ 1	7	{ 4	{ 4	{ 1	9	{ 6
20,000 and over			3		3	1	3	4	4	1	4	6
Total	100	100	100	100	100	100	100	100	100	100	100	100
Median	\$5,800	\$4,925	\$8,900	\$7,550	\$5,650	\$4,800	\$8,525	\$7,250	\$6,000	\$5,100	\$9,325	\$7,925

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

Source: Estimated by Housing Market Analyst.

Table VII

Population and Household Trends
Vallejo - Napa, California, HMA
April 1, 1960 - March 1, 1972

	April 1, 1960	March 1, 1970	March 1, 1972	Average annual change			
				1960-1970		1970-1972	
				Number	Percent ^{a/}	Number	Percent ^{a/}
<u>Population</u>							
Vallejo - Napa HMA	200,487	263,400	273,400	6,350	2.7	5,000	1.8
Military ^{b/}	72,500	79,500	72,700	700	1.0	-3,400	-4.3
Nonmilitary	127,987	183,900	200,700	5,650	3.7	8,400	4.3
Solano County	134,597	180,600	187,600	4,650	3.0	3,500	1.9
Napa County	65,890	82,800	85,800	1,700	2.3	1,500	1.8
<u>Households</u>							
Vallejo - Napa HMA	57,320	80,575	84,175	2,350	3.5	1,800	2.2
Military ^{c/}	18,850	21,050	19,200	225	1.1	-925	-4.4
Nonmilitary	38,470	59,525	64,975	2,125	4.4	2,725	4.4
Solano County	38,453	54,700	57,100	1,650	3.6	1,200	2.1
Napa County	18,867	25,875	27,075	700	3.2	600	2.3

^{a/} Derived through the use of a formula designed to calculate the percentage rate of change on a compound basis.

^{b/} Includes uniformed military personnel and their dependents, and civil service employees working at either of the three defense installations in the HMA and their dependents.

^{c/} Includes households with uniformed military or military-connected civil service head.

Sources: 1960 Censuses of Population and Housing; 1970 and 1972 estimated by Housing Market Analyst.

Table VIII

Housing Units Authorized by Building Permits
Vallejo - Napa, California, HMA
1960 - 1969

Year	Vallejo - Napa HMA			Solano County			Napa County		
	Total	Single-family	Multifamily	Total	Single-family	Multifamily	Total	Single-family	Multifamily
1960	1,196	887	309	824	553	271	372	334	38
1961	2,700 ^{a/}	1,839	861	2,043 ^{a/}	1,342	701	657	497	160
1962	2,319	1,406	913	1,594	930	664	725	476	249
1963	2,989	1,791	1,198	2,238	1,320	918	751	471	280
1964	3,217 ^{b/}	1,993	1,224	2,400 ^{b/}	1,418	982	817	575	242
1965	2,329 ^{c/}	1,408	921	1,630 ^{c/}	929	701	699	479	220
1966	2,247	1,388	859	1,510	954	556	737	434	303
1967	2,403	1,440	963	1,619	903	716	784	537	247
1968	2,450	1,450	1,000	1,638	811	827	812	639	173
1969 ^{d/}	1,773	1,196	577	1,035	688	347	738	508	230

^{a/} Includes 876 units of public housing.

^{b/} Includes 200 units of public housing.

^{c/} Includes 200 units of public housing.

^{d/} First eleven months.

Sources: U.S. Bureau of the Census and local building permit offices.

Table IX

Components of Housing Inventory
Vallejo - Napa, California, HMA
April 1, 1960 and March 1, 1970

	<u>Vallejo-Napa HMA</u>	<u>Solano County</u>	<u>Napa County</u>
<u>April 1, 1960</u>			
Total housing inventory	63,070	41,894	21,176
Total occupied units	57,320	38,453	18,867
Owner-occupied	35,212	22,046	13,166
Percent	61.4	57.3	69.8
Renter-occupied	22,108	16,407	5,701
Percent	38.6	42.7	30.2
Total vacant units	5,750	3,441	2,309
Available vacant	2,952	2,214	738
For sale	787	505	282
Homeowner vacancy rate	2.2%	2.2%	2.1%
For rent	2,165	1,709	456
Renter vacancy rate	8.9%	9.4%	7.4%
Other vacant ^{a/}	2,798	1,227	1,571
<u>March 1, 1970</u>			
Total housing inventory	85,275	57,400	27,875
Total occupied units	80,575	54,700	25,875
Owner-occupied	49,850	31,925	17,925
Percent	61.9	58.4	69.3
Renter-occupied	30,725	22,775	7,950
Percent	38.1	41.6	30.7
Total vacant units	4,700	2,700	2,000
Available vacant	2,000	1,500	500
For sale	900	600	300
Homeowner vacancy rate	1.8%	1.8%	1.6%
For rent	1,100	900	200
Renter vacancy rate	3.5%	3.8%	2.5%
Other vacant ^{a/}	2,700	1,200	1,500

^{a/} Includes dilapidated units, seasonal units, units rented or sold and awaiting occupancy, and units held off the market for absentee owners or other reasons.

Sources: 1960 Census of Housing; 1970 estimated by Housing Market Analyst.

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