

HRMA

Housing Requirements and Market Analysis

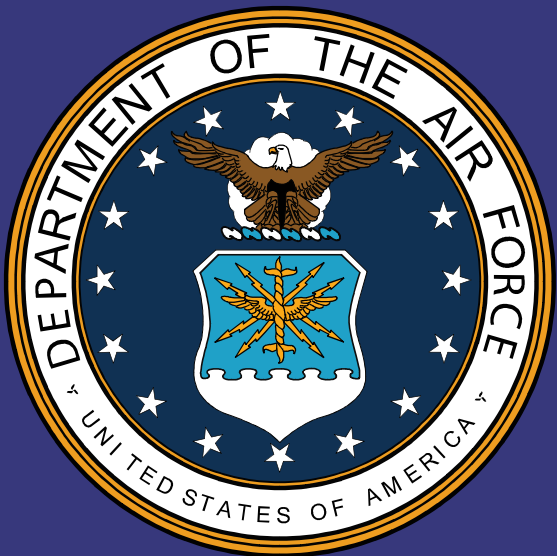
United States Air Force



SEYMOUR JOHNSON

AIR FORCE BASE

NORTH CAROLINA



2010 - 2015

JULY 2010

HOUSING REQUIREMENTS AND MARKET ANALYSIS

Seymour Johnson Air Force Base 2010 – 2015

Prepared for:

Air Force Center for Engineering and the Environment
(AFCEE)

Air Force Housing Division (AF/A7CAH)

Air Combat Command (ACC)

Seymour Johnson Air Force Base

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**HOUSING
REQUIREMENTS
AND MARKET
ANALYSIS**

**Seymour Johnson Air Force Base
2010 – 2015**

EXECUTIVE SUMMARY

Seymour Johnson AFB, North Carolina
Housing Requirements and Market Analysis (HRMA)

Results

Based on the results of the Draft HRMA, dated May 12, 2010 the projected on-base family housing requirement is

Minimum Housing "Floor" Requirement	249
Market Housing Shortfall	297
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Total Projected MFH Requirement	546

Coordination



Base Civil Engineer

26 May 10
Date

Approval



Wing Commander

1 Jun 10
Date

EXECUTIVE SUMMARY

This Housing Requirements and Market Analysis (HRMA) for Seymour Johnson Air Force Base (AFB), North Carolina, assesses the ability of the private sector housing market to meet the needs of military families. The Seymour Johnson AFB study results are:

Total Military Family Housing Requirement	546
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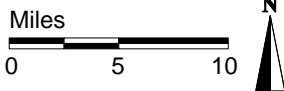
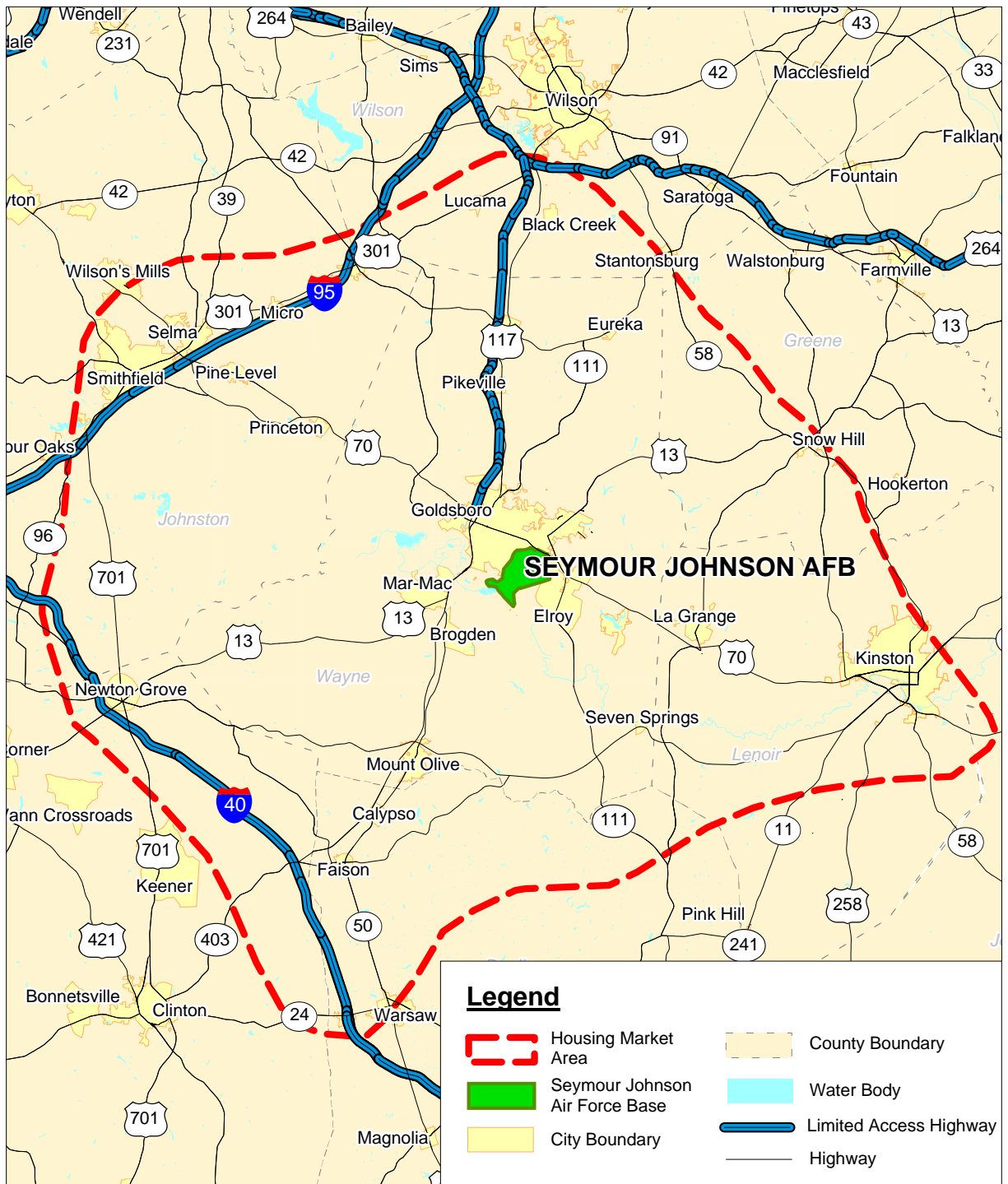
The Total Military Housing Requirement is based on a five-year planning period ending in 2015. In 2015, the installation is projected to support 4,371 personnel who are authorized housing, including 2,176 military families (Table ES-1).

**Table ES-1. Total Military Family Housing Requirement
Summary, Planning Period 2010 - 2015**

	Total
PLANNED MANPOWER	4,371
MILITARY FAMILIES	2,176
Minimum Housing Requirement	249
Private Sector Shortfall	297
TOTAL MILITARY FAMILY HOUSING REQUIREMENT	546

Seymour Johnson AFB is located in Wayne County, North Carolina and is directly southeast of the City of Goldsboro (Figure ES-1). For the purposes of this HRMA, only housing within the Seymour Johnson AFB Housing Market Area can be considered suitable for authorized military personnel. The rental market in the Goldsboro area is strongly influenced by the homeowner market with an estimated 84.4 percent of all housing units in single-family structures. Consequently, trends in the homeowner market since 2000 with annual price growth at 3.5 percent have resulted in estimated annual rent growth of 3.2 percent. Local property managers indicate that vacancies have increased to 7.4 percent as a result of the weakening economy. Consequently, growth in new units is expected to moderate over the study planning period, resulting in vacancies declining to levels of 5.0 by 2015.

Figure ES-1. Seymour Johnson Air Force Base Housing Market Area, 2010



CHANGES IN THE TOTAL HOUSING REQUIREMENT

HRMA results for an installation can vary as market and manpower change over time. A comparison to the previous HRMA analysis conducted for Seymour Johnson AFB is presented in Table ES-2.

Table ES-2. Total Military Family Housing Requirement History

Planning Year of HRMA Results	2005 Seymour Johnson AFB HRMA	2010 Seymour Johnson AFB HRMA	Total Change	Percent Change
PLANNED MANPOWER	4,625	4,371	(254)	(5.5%)
MILITARY FAMILIES	2,354	2,176	(178)	(7.6%)
Minimum Housing Requirement	253	249	(4)	(1.6%)
Military Family Homeowners	769	1,196	427	55.5%
Military Family Renters	1,332	731	(601)	(45.1%)
Private Sector Shortfall	647	297	(350)	(54.1%)
TOTAL MILITARY FAMILY HOUSING REQUIREMENT	900	546	(354)	(39.3%)

COMPONENTS OF CHANGE

Changes at the installation and within the housing market impact the Total Housing Requirement (Table ES-3).

Table ES-3. Components of Change from the 2005 Seymour Johnson AFB HRMA

MILITARY	HOUSING MARKET
➤ Manpower Authorized personnel for the projected year decreased by 254 service members	➤ Rental Supply Market growth projected at 0.5% similar to the 0.5% in the 2005 HRMA
➤ Military Families decreased by 178	➤ Vacancy Rate Currently at 7.4% compared to 3.5% in the 2005 HRMA
➤ Families Rental Requirement decreased by 601	
➤ Unaccompanied Personnel decreased by 158	➤ Rental Costs Increased 17.8% since the 2005 HRMA
➤ Unaccompanied Rental Requirement decreased by 37	➤ Basic Allowance for Housing (BAH) Increased from 24.1% to 37.0% since 2005

POLICY AND ASSUMPTIONS

In addition to changes in the HRMA parameters, changes in policy or analytical assumptions resulted in significant impacts on the Total Housing Requirements. These changes include:

1. **Methodology** - The 2005 HRMA for Seymour Johnson AFB applied the Dynamic Adjustment Model which bases the housing requirement on a hypothetical transition of military families in government-controlled housing in excess of the Minimum “Floor” Housing Requirement to community housing over a five-year period. Under current Air Force guidance, the OSD Dynamic Adjustment Model is no longer applied.

To determine the housing requirement, this HRMA applies a proportional allocation of military and civilian rental demand to the suitable supply of community rental housing for the projected year of the analysis.

2. **Purchasing Power** - Since 2005, rental costs in the market have grown 17.8 percent and BAH for military families has increased within a range from 24.1 percent to 37.0 percent, depending on pay grade. This increase in purchasing power contributed to the decrease in the private sector shortfall compared to the 2005 Seymour Johnson AFB HRMA.
3. **Homeownership** – Due to the accelerated nature of this HRMA, AF/A7CAH directed that an Air Force Housing Survey not be conducted and to apply homeownership rates used in the 2005 Seymour Johnson HRMA. The homeownership rates applied in the 2005 HRMA were based on 1997 Variable Housing Allowance (VHA) survey data. This data, in addition to being thirteen years old, is based only on personnel living off-base.

The occupancy of on-base units is used to estimate the number of families living off-base for both the current and projected years. The 2005 HRMA estimated that 1,284 on-base units would be occupied by military households in the projected year of 2010. This HRMA assumes that on-base occupancy in the projected year to remain at the current occupancy of 526 units. Computations of homeownership based on additional military families living off-base, result in significantly higher estimated homeowners than estimated in the 2005 HRMA.

TOTAL REQUIREMENT SUMMARY TABLES

Table ES-4. Seymour Johnson AFB Total Military Family Housing Requirement

Pay Grade	Military Families	Military Community	Key & Essential	Historic Housing	Minimum Housing Requirement	Private Sector Shortfall	Total Military Housing Requirement
O7+	-	-	-	-	-	-	-
O6	6	1	7	-	7	-	7
O5	40	4	25	-	25	1	26
O4	43	4	-	-	4	4	8
O3	116	12	-	-	12	3	15
O2	42	4	-	-	4	11	15
O1	11	1	-	-	1	2	3
Officers	258	26	32	-	53	21	74
E9	18	2	5	-	5	-	5
E8	59	6	-	-	6	1	7
E7	278	28	-	-	28	4	32
E6	433	43	-	-	43	30	73
E5	601	60	-	-	60	96	156
E4	338	34	-	-	34	84	118
E3	155	16	-	-	16	49	65
E2	18	2	-	-	2	6	8
E1	18	2	-	-	2	6	8
Enlisted	1,918	193	5	-	196	276	472
Total	2,176	219	37	-	249	297	546

Table ES-5. Military Family Private Sector Shortfall

Pay Grade	Number of Bedrooms			Total
	Two	Three	Four+	
O7+	-	-	-	-
O6	-	-	-	-
O5	-	-	1	1
O4	-	2	2	4
O3	2	1	-	3
O2	8	3	-	11
O1	1	1	-	2
Officers	11	7	3	21
E9	-	-	-	-
E8	-	-	1	1
E7	-	-	4	4
E6	5	23	2	30
E5	27	60	9	96
E4	58	20	6	84
E3	44	3	2	49
E2	5	1	-	6
E1	5	1	-	6
Enlisted	144	108	24	276
Total	155	115	27	297

Table ES-6. Total Military Family Housing Requirement

Pay Grade	Number of Bedrooms			Total
	Two	Three	Four+	
O7+	-	-	-	-
O6	-	-	7	7
O5	-	17	9	26
O4	-	5	3	8
O3	11	3	1	15
O2	11	4	-	15
O1	2	1	-	3
Officers	24	30	20	74
E9	-	-	5	5
E8	-	5	2	7
E7	-	22	10	32
E6	25	38	10	73
E5	66	75	15	156
E4	87	24	7	118
E3	59	4	2	65
E2	7	1	-	8
E1	7	1	-	8
Enlisted	251	170	51	472
Total	275	200	71	546

FRMA

Housing Requirements and Market Analysis

United States Air Force



2010 - 2015

SEYMOUR JOHNSON
AIR FORCE BASE
NORTH CAROLINA

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ACRONYMS AND ABBREVIATIONS

ACC	Air Combat Command
AFB	Air Force Base
AFCEE	Air Force Center for Engineering and the Environment
AF/A7CAH	Air Force Housing Division
AHRN	Automated Housing Referral Network
BAH	Basic Allowance for Housing
BAS	Basic Allowance for Subsistence
BRAC	Base Realignment and Closure
COLA	Cost of Living Adjustment
CONUS	Continental United States
DoD	U.S. Department of Defense
FHFA	Federal Housing Finance Agency
FMR	Fair Market Rent
FY	Fiscal Year
HQ	Headquarters
HRMA	Housing Requirements and Market Analysis
HUD	U.S. Department of Housing and Urban Development
IMRD	Integrated Manpower Requirements Document
K&E	Key and Essential
MAJCOM	Major Command
MAHC	Maximum Allowable Housing Cost
MFH	Military Family Housing
MHA	Military Housing Area
MSA	Metropolitan Statistical Area
OSD	Office of the Secretary of Defense
PCS	Permanent Change of Station
SOCDS	State of the Cities Data System
VHA	Variable Housing Allowance

GLOSSARY OF TERMS

Accompanied Personnel – Military members who are eligible to receive With Dependents housing allowances.

Authorized Civilian Households – Civilian households which are authorized military housing at an installation.

Basic Allowance for Housing (BAH) – The housing allowance paid to eligible members at an installation.

Effective Rental Housing – Rental housing units that are affordable and suitable to the military households and meet their bedroom entitlements.

Floor Housing Requirement – The minimum military housing assets for military families and/or unaccompanied personnel required by an installation by policy determination. Also defined as the Military Family Minimum Housing Requirement for military families and the Unaccompanied Personnel Minimum Housing Requirement for unaccompanied personnel.

Historic Housing – On-base housing units listed on or eligible for the National Register of Historic Places under the National Historic Preservation Act.

Housing Market Area – The geographic area defined by the Air Force for the purposes of determining the Total Military Family Housing Requirement for an installation.

Key and Essential Housing Requirement (K&E) – A criterion for the Minimum Housing Requirement which provides housing for all Key and Essential military and civilian personnel required to live in military housing.

Market Segment – A portion of the rental housing market defined monthly rental costs and the number of bedrooms.

Maximum Allowable Housing Cost (MAHC) – The highest rental cost by Air Force policy that determines the affordability of private sector rental housing for military personnel.

Military Community Housing Requirement – A criterion of the Minimum Housing Requirement whereby ten percent of the military family housing requirement by pay grade is determined to represent a viable military community.

Military Families – Those authorized personnel who are eligible for military family housing at an installation.

Military Family Housing (MFH) Supply – All housing controlled by the U.S. Government for use by military family members at an installation including military owned housing, housing under lease to the Air Force, housing privatized by the Air Force and housing overseas provided by the host country.

Military Family Minimum Housing Requirement – The minimum number of military family housing assets for the installation as defined by policy. Also referred to as the Military Family Floor Housing Requirement.

Military Housing – Government owned or leased family housing and unaccompanied dormitory units available for use by military members.

Military Housing Area – The geographic area that defines the Basic Allowance for Housing for the installation.

Military Households Requiring Housing – Military personnel including accompanied and unaccompanied personnel that an installation has the responsibility to house, either in military housing or in private sector housing.

Military Market Share – The number of rental housing units that are allocated to military households requiring rental housing based on their proportion of the total demand.

Planning Period – The five-year planning horizon incorporated into the HRMA covering, from the initial year to the final year of the analysis.

Private Sector Housing – Housing in the local community that is not owned or leased by a governmental organization.

Private Sector Shortfall – The difference between those military members requiring private sector rental housing and the military market share.

Privatized Housing – Housing units constructed and maintained by the private sector through agreements or partnerships with the U.S. Air Force for primary occupancy by military personnel at the installation.

Restricted Rental Housing – Rental housing units which are generally not available to military personnel due to restrictive requirements such as age and income limits on the rental units.

Service – A military branch of the armed forces of the United States of America.

Student Requirement – Military students required to reside in military housing.

Total Military Family Housing Requirement – The number of family housing units that the U.S. Government must provide in addition to housing available in the private sector to adequately house military families at an installation. The requirement is determined as the sum of the Minimum Housing Requirement plus any shortfall of housing in the private sector on a pay grade basis.

Total Military Housing Requirement – The sum of the minimum housing requirement and the number of military households unsuitably housed in the private sector for the accompaniment status.

Unaccompanied Personnel – Military personnel who have no dependents and who are not married.

Unaccompanied Personnel Minimum Housing Requirement – The minimum unaccompanied housing assets for the installation as defined by policy. Also defined as the Unaccompanied Personnel Floor Housing Requirement.

Vacancy Rate – The number of rental units that are vacant divided by the total rental housing supply.

Voluntary Separations – Military members who are voluntarily separated geographically from family members. Also known as Voluntary Family Separations.

1.0 INTRODUCTION

The Housing Requirements and Market Analysis (HRMA) is a detailed study to determine the quantity and bedroom configuration of military housing the U.S. Government must provide to ensure that all military family households that Seymour Johnson Air Force Base (AFB), North Carolina has the responsibility to house, have access to acceptable housing.

This report, and the analysis upon which the results are based, follows Air Force guidance implementing the HRMA process as advocated by the Office of the Secretary of Defense (OSD). Adherence to this guidance ensures a consistent determination of housing requirements across military services in support of the planning and programming processes.

This section describes the following:

- Methodology
- Policy and Assumptions
- Report Organization

1.1 METHODOLOGY

The HRMA follows OSD guidance which specifies that military services must rely first on the private sector to meet its housing needs prior to considering military housing. Policy allows for each service to establish a minimum requirement. The Total Military Housing Requirement is determined in part by the number of authorized families and others for whom the installation has the responsibility to house at the end of the five-year planning period. For military families not accommodated in the minimum housing requirement, the HRMA determines whether there is sufficient affordable, suitable private sector housing to meet their needs. The Minimum Family Housing Requirement plus any shortfall of private sector housing within the Housing Market Area determines the installation's Total Military Family Housing Requirement (Figure 1-1).

The minimum housing requirement for unaccompanied personnel is defined by policy by pay grade and length of service of the personnel required to reside in unaccompanied government quarters. The minimum housing requirement for military families is based on three criteria evaluated for the final year of the analysis:

- The need for a military community;
- Housing for personnel in Key and Essential positions; and,
- Preservation of historic housing.

Figure 1-1. Housing Requirements and Market Analysis Process Summary

- Determine the housing market area based on the greater of a 60-minute commute or 20 miles from the installation's headquarters building or major work centers.
- Apply the *Integrated Manpower and Requirements Document* (IMRD) for determining the military families and unaccompanied personnel requiring housing for the final year of the planning period.
- Determine the Military Family Minimum Housing Requirement:
 - Military Community
 - Key and Essential
 - Historic Housing
- Determine the Unaccompanied Personnel Minimum Housing Requirement.
- Determine the potential private sector requirement as the number of military families and unaccompanied personnel households in excess of their minimum housing requirements in the fifth year of the planning period.
- Determine the competing demand actively seeking available suitable rental housing.
- Determine the effective rental supply for the last year of the planning period.
- Compute the military market allocation for each market segment:

$$\text{Military Market Share} = \frac{\text{Competing Military Demand}}{\text{Total Competing Demand}} \times \text{Suitable Supply}$$

- Compare the military market allocation to the military rental requirement to determine a Private Sector Shortfall, if any, in the final year of the planning period.
- Establish the Total Military Family Housing Requirement as the sum of the Minimum Housing Requirement and any Private Sector Shortfall.

Private sector rental housing is assessed separately from owner-occupied housing. Military members who own their home are considered suitably housed. The homeowner market is otherwise not addressed if it is viable and responsive.

The sufficiency of the rental housing market is determined by comparing the military market share of suitable housing to the number of families and unaccompanied personnel requiring housing. An allocation process is used in which military families, unaccompanied personnel, and civilians who are in the rental market in the final year of the five-year planning period each receive a proportional market share of the affordable, suitable rental housing.

In making its determination of market sufficiency, the analysis distinguishes between the total rental housing supply and rental housing that is affordable and suitable for military personnel. The criteria for affordable, suitable rental housing includes location in the housing market area, health and safety considerations,

acceptable unit type, and military housing allowances. The analysis divides the rental market into market segments by rental cost (rent, utility costs, and renter's insurance) and number of bedroom categories. The suitable housing allocated to the military families within each market segment is the proportion of affordable, suitable housing in that segment equal to the proportion of the military families to the total competing housing demand within the market segment. This allocation becomes the market share for military families.

To determine if there is sufficient private sector housing, the market share for military families is compared to their respective private sector rental housing requirement in each market segment. A private sector rental requirement in excess of allocated suitable rentals in a market segment constitutes a shortfall for the military families in that market segment. The sum of the shortfalls for each market segment is the Private Sector Shortfall.

The final step of the HRMA methodology is determining the Total Military Family Housing Requirement. The Total Military Family Housing Requirement is the sum of the Military Family Minimum Housing Requirement, and the Private Sector Shortfall, if any, in the final year of the planning period.

1.2 POLICY AND ASSUMPTIONS

The following critical policies and assumptions are used in this HRMA.

1.2.1 METHODOLOGY

This HRMA applies a methodology that determines a proportional market share for military households based on the suitable housing available for rent and the number of civilian and military households seeking rental housing.

1.2.2 HOUSING SUPPLY

Only housing within the Housing Market Area is considered in the analysis. The Housing Market Area is based on the greater of either a 60-minute commute or 20 miles from the installation's headquarters building or major work centers.

The number of rental housing units and the distribution of housing by number of bedrooms and rent categories are based on the 2000 U.S. Census, residential construction permits, and other data. Rental housing includes only units on less than ten acres of land for which cash rent is paid and excludes seasonal rental housing.

1.2.3 HOUSING SUITABILITY

Only housing within the housing market area is considered suitable for military personnel. Additionally, suitable housing must be located in areas suitable for military members based on health and safety considerations, of an acceptable unit

type, and above a minimum quality. Discussions with Seymour Johnson AFB housing personnel, interviews with local property managers and realtors, surveys of the local community, and other published data were utilized in the housing suitability determination process.

All homeowner-occupied housing, with the exception of mobile homes, is considered suitable housing for military personnel.

1.2.4 HOUSING DEMAND

Civilian demand estimates are based on population and economic projections for the region, census information, residential construction permit data, and other factors.

Military family housing requirements are based on manpower authorizations projected for the final year of the planning period.

The methodology assumes that in the final year of the planning period, military families will occupy government-provided or privatized housing that fulfills the Minimum Housing Requirement. Military families in excess of the Minimum Housing Requirement would require private sector housing for the purpose of the HRMA analysis.

1.2.5 RENTAL RATES

Rental costs are assumed to remain constant for the duration of the five-year planning period based on the assumption that the Basic Allowance for Housing (BAH) rates will appropriately track rental housing costs.

1.2.6 MILITARY HOUSING AFFORDABILITY

The Maximum Allowable Housing Cost (MAHC), the upper limit of affordability for housing for each pay grade, is set to the local median housing cost for that pay grade (BAH) as determined by the Per Diem, Travel and Transportation Allowance Committee. For the purposes of this analysis, MAHC and BAH are held constant over the five-year planning period.

1.2.7 MILITARY/PRIVATIZED HOUSING SUPPLY

Privatized housing units are constructed and maintained by the private sector for primary occupancy by military personnel. As provided by Seymour Johnson AFB, currently there are 1,190 military controlled units with the inventory to reach an end-state at 898 units in 2015.

1.2.8 MILITARY HOUSING REQUIREMENTS

Military family housing requirements are the number of families that the installation has the responsibility to house. The number of families in the final

year of the planning period is drawn from the *2010 Integrated Manpower and Requirements Document (IMRD)*.

Bedroom entitlements are based on family characteristics of personnel currently assigned to the installation with each dependent child having a bedroom and a minimum bedroom entitlement based on military member's rank. For unaccompanied personnel, those in grades E4 (three or more years of service) and above require private sector housing.

Due to the accelerated nature of this HRMA, AF/A7CAH directed that an Air Force Housing Survey not be conducted and to apply homeownership rates used in the 2005 Seymour Johnson HRMA. The homeownership rates applied in the 2005 HRMA were based on 1997 Variable Housing Allowance (VHA) survey data.

Military personnel currently residing in government-owned or leased housing or privatized housing are assumed to become renters if required to live in the private sector.

1.3 REPORT ORGANIZATION

This HRMA for Seymour Johnson AFB is presented in the following chapters:

- Chapter 2. The Housing Market
- Chapter 3. Military Housing Requirements
- Chapter 4. Minimum Military Housing Requirements
- Chapter 5. Competing Demand
- Chapter 6. Effective Rental Housing Supply
- Chapter 7. Total Military Housing Requirement
- Chapter 8. Summary
- Chapter 9. References

2.0 THE HOUSING MARKET

The Housing Market Area sets the geographic limits of the HRMA analysis. Only the housing within the Housing Market Area is considered in determining the Total Military Housing Requirement for Seymour Johnson AFB. This chapter describes the Housing Market Area and the current housing market conditions and regional factors that impact the future housing supply available to military households in the following sections:

- The Housing Market Area
- Housing Market Conditions
 - Market Trends
 - Homeowner Housing Supply
 - Rental Housing Supply
- Military/Privatized Housing

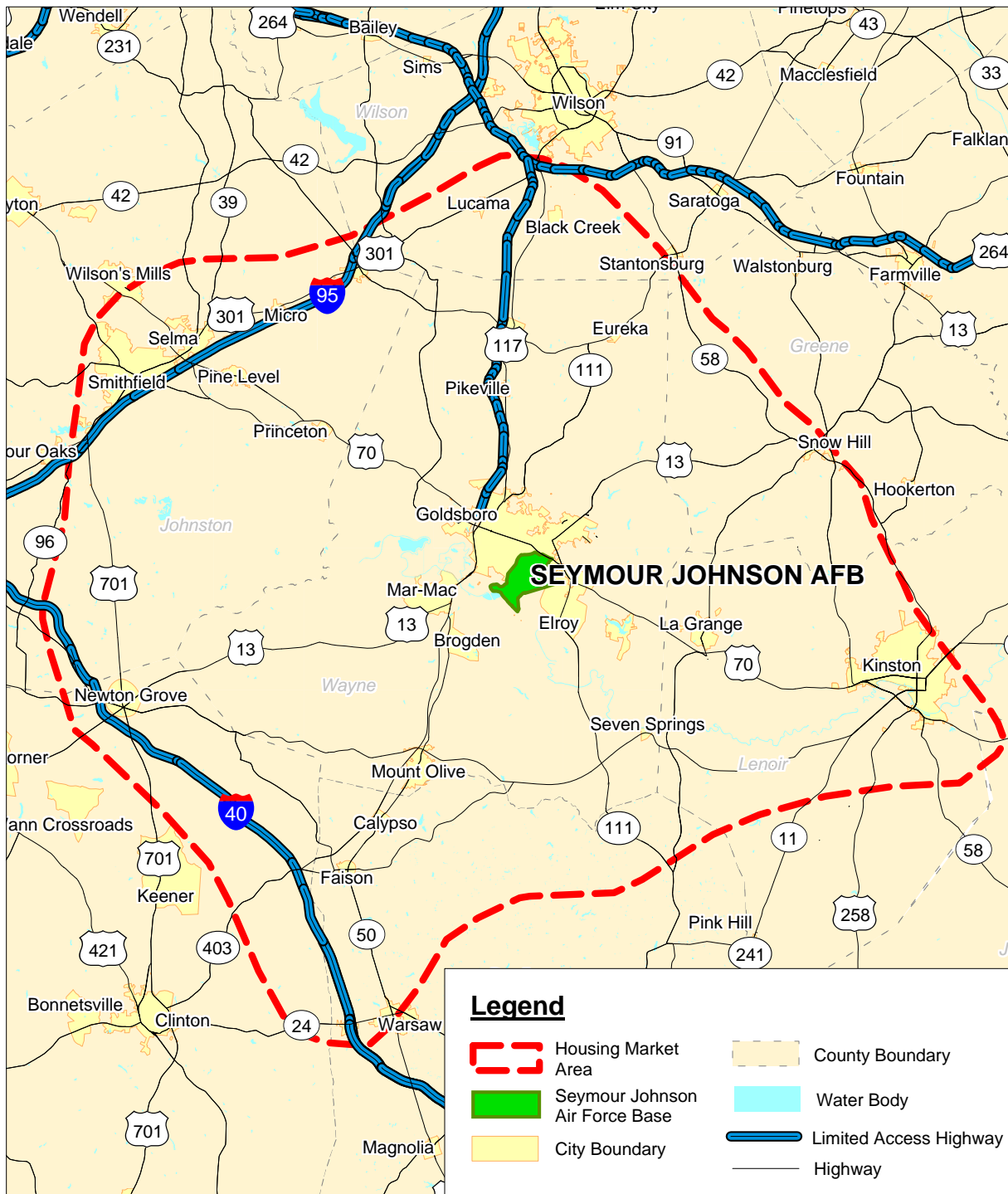
2.1 THE HOUSING MARKET AREA

The Housing Market Area for Seymour Johnson AFB is defined by the greater of either a one-hour commute or twenty miles distance originating from the installation's headquarters building during peak traffic in privately owned vehicles assuming normal weather conditions.

Seymour Johnson AFB is located in Wayne County, North Carolina and is directly southeast of the City of Goldsboro. The Housing Market Area can be described as follows (Figure 2-1):

- Encompasses all of Wayne County;
- The northern boundary extends into the southern portion of Wilson County to include the town of Black Creek;
- The southern boundary extends to I-40 near the town of Warsaw;
- Highway 70 bisects the market area from the northwest near Selma in Johnston County to the southeast of Kinston in Lenoir County;
- The western boundary follows Highway 96 south from Wilson's Mills in Johnston County to Newton Grove in Sampson County;
- The eastern boundary follows Highway 58 from Stantonsburg to Kinston.

Figure 2-1. Seymour Johnson Air Force Base Housing Market Area, 2010



2.2 HOUSING MARKET CONDITIONS

Private sector housing includes both homeowner housing as well as rental housing within the Housing Market Area. In 2010, there are an estimated 99,970 private sector housing units in the Housing Market Area (Table 2-1). The current private sector housing inventory includes 68,075 homeowner units and 31,895 rental units.

Table 2-1. Private Sector Housing in the Housing Market Area, 2010

Housing Ownership	2010
Homeowner Housing	68,075
Rental Housing	31,895
Vacant Units	1,882
Total	99,970

2.2.1 MARKET TRENDS

The housing market is characterized by trends in housing supply growth which directly effect trends in rental prices and the availability of rental units (Table 2-2).

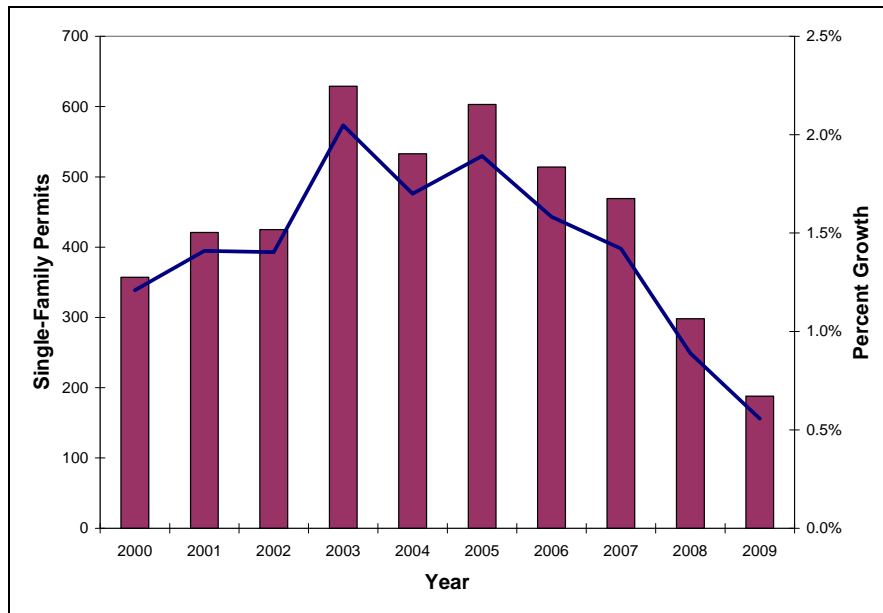
Table 2-2. Housing Market Trends, 2000-2010

Data Element	Average Annual Growth
Homeowner Supply	1.1%
Homeowner Price	3.5%
Rental Supply	0.9%
Rental Price	3.2%

2.2.1.1 Homeowner Market

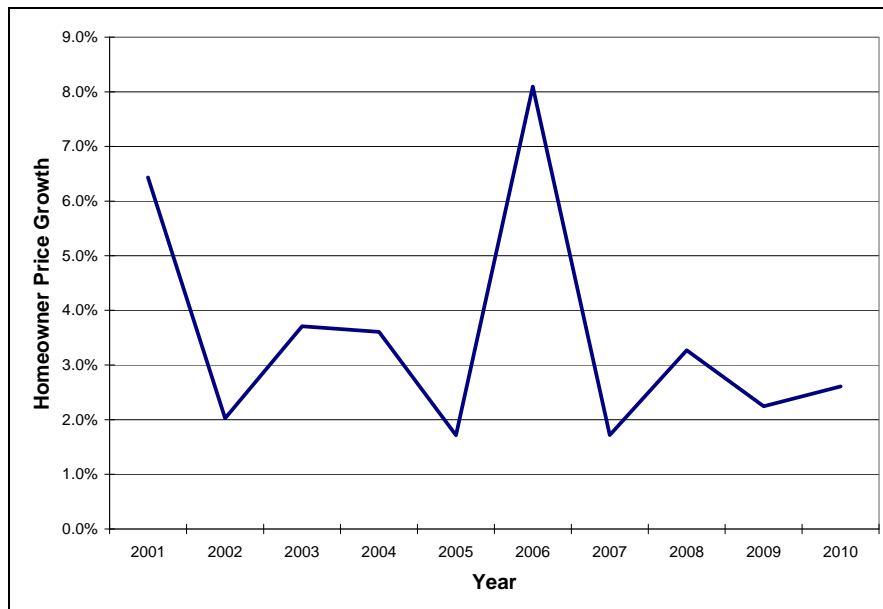
Building permit data from U.S. Department of Housing and Urban Development (HUD) for the Goldsboro, NC MSA indicates that the single-family housing stock has grown at an average rate of about 1.4 percent annually since 2000, peaking from 2003 to 2005 (Figure 2-2). The strong growth in building during the early part of the decade was largely due to consistently increasing homeowner prices and national trends for low interest financing (Figure 2-3). Nevertheless, permits have steadily declined since 2005 with the most significant drop coming in 2008 and 2009, as national trends of tighter credit and higher interest rates emerged.

Figure 2-2. Single-Family Building Permits in Goldsboro, NC MSA, 2000-2009



Source: HUD SOCDs, 2010

Figure 2-3. Homeowner Price Growth for Goldsboro, NC MSA, 2000-2010



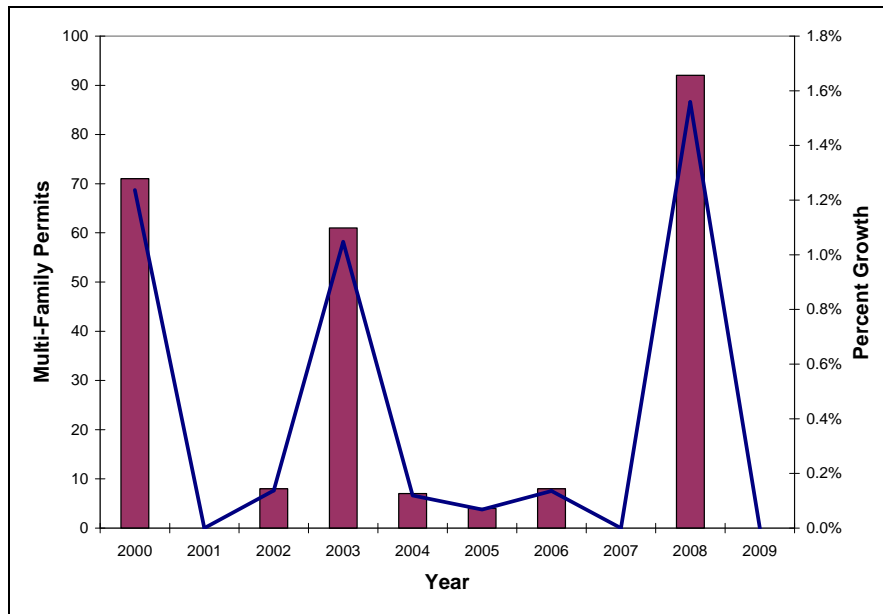
Source: FHFA, 2010

2.2.1.2 Rental Market

Building permit data from U.S. Department of Housing and Urban Development (HUD) for the Goldsboro, NC MSA indicates that the multi-family housing stock has grown at an average rate of 0.4 percent annually since 2000 (Figure 2-4). Fluctuations exist from year to year with no apparent trend. Multi-family units are a very low percentage of all new units built within the Goldsboro MSA, accounting for only 5.4 percent of new units since 2000. Correspondingly, with

very few new apartment complexes financed, the local rental market utilizes many single-family units with over 42 percent of rental market units in single-family structures in 2000. This high dependence on single-family units to accommodate rental market demand in conjunction with steadily increasing homeowner prices has contributed to growth rents with HUD estimating 3.2 percent annual growth in Fair Market Rents since 2000.

Figure 2-4. Multi-Family Building Permits in Goldsboro, NC MSA, 2000-2009



Source: HUD SOCDs, 2010

2.2.2 HOMEOWNER HOUSING SUPPLY

All owner-occupied housing is considered suitable for military personnel with the exception of mobile homes. There are no impediments to the continued growth of owner-occupied housing. As such, this HRMA does not explicitly address the sufficiency of the homeowner market.

2.2.3 RENTAL HOUSING SUPPLY

The total rental supply is based on the trends in supply growth and price changes from the 2000 Census baseline data. For the purposes of the HRMA, the rental supply consisted only of specified housing units - those rental units for which cash rent is paid and are located on less than ten acres.

The total 2010 rental housing in the Housing Market Area is estimated at 31,895 units. Two-bedroom and smaller units make up 67.6 percent of rental housing supply. Three-bedroom units make up 28.2 percent of rental housing and the remaining 4.2 percent have four or more bedrooms (Table 2-3).

The total rental supply includes housing that the military members are generally not able to obtain, such as rental units restricted by incomes or age requirements.

Often for low income housing, if the military member is eligible, waiting times to access the housing effectively makes the housing unavailable to the member. There are 6,337 rental units in the Housing Market Area that target a subset of the rental demand through eligibility restrictions (i.e., income and age restricted housing) that are not considered as part rental housing supply for military households for the purposes of the HRMA.

Table 2-3. Total Rental Housing, 2010

Rental Cost ¹	Number of Bedrooms					Total
	None	One	Two	Three	Four+	
\$1,900 & Above	-	3	17	52	16	88
\$1,700 - \$1,899	-	3	16	54	14	87
\$1,500 - \$1,699	1	8	38	141	20	208
\$1,300 - \$1,499	1	14	80	223	35	353
\$1,100 - \$1,299	-	42	299	615	97	1,053
\$1,000 - \$1,099	1	66	442	517	71	1,097
\$900 - \$999	6	137	915	681	94	1,833
\$800 - \$899	11	268	1,470	961	135	2,845
\$700 - \$799	16	399	2,226	1,318	205	4,164
\$600 - \$699	56	900	2,484	1,201	182	4,823
\$500 - \$599	67	1,197	2,170	1,182	177	4,793
Below \$500	366	3,736	4,098	2,051	300	10,551
Total	525	6,773	14,255	8,996	1,346	31,895

2.2.3.1 Rental Housing Vacancies

Rental vacancy rates in the market are important in assessing the availability of rental housing for military personnel. According to local property managers the current rental vacancy rate is 7.4 percent, higher than long-term historical averages. Market vacancies are expected to drop to 5.0 percent as the market becomes more balanced due to the current slowing in the building cycle.

There are currently an estimated 1,882 vacant rental units in the Housing Market Area (Table 2-4).

¹ Includes rent, utility costs, and renter's insurance

Table 2-4. Vacant Rental Housing, 2010

Rental Cost ¹	Number of Bedrooms					Total
	None	One	Two	Three	Four+	
\$1,900 & Above	-	-	1	5	1	7
\$1,700 - \$1,899	-	-	1	4	1	6
\$1,500 - \$1,699	-	1	3	11	1	16
\$1,300 - \$1,499	-	1	6	16	2	25
\$1,100 - \$1,299	-	3	22	45	7	77
\$1,000 - \$1,099	-	5	33	36	4	78
\$900 - \$999	-	10	67	47	5	129
\$800 - \$899	1	19	101	63	8	192
\$700 - \$799	2	25	153	75	10	265
\$600 - \$699	3	58	141	66	9	277
\$500 - \$599	2	56	106	65	9	238
Below \$500	17	186	228	125	16	572
Total	25	364	862	558	73	1,882

2.3 MILITARY/PRIVATIZED HOUSING

Privatized housing units are constructed and maintained by the private sector for primary occupancy by military personnel at the installation. For many installations, privatized housing has replaced government-owned and controlled housing. The total housing supply at Seymour Johnson AFB is currently 1,190 government-owned units (Table 2-5).

Table 2-5. Military/Privatized Housing Supply, 2010

Inventory	Total
Military Owned or Leased	1,190
Active Units	531
Inactive Units	659
Privatized Housing Supply	-

¹ Includes rent, utility costs, and renter's insurance

3.0 MILITARY HOUSING REQUIREMENTS

This chapter reports the number of military families and unaccompanied personnel requiring housing at Seymour Johnson AFB in the following sections:

- Authorized Manpower
- Military Family Housing Requirements
- Unaccompanied Personnel Housing Requirements

3.1 AUTHORIZED MANPOWER

Authorized manpower includes all personnel that the housing office has the responsibility to house. Authorized manpower is 4,764 in 2010 and 4,371 personnel by 2015 (Table 3-1). Current manpower authorizations are based on ACC and Seymour Johnson AFB data. Projected manpower and pay grade distribution are from the AF/A7CAH 2010 IMRD.

Table 3-1. Seymour Johnson AFB Manpower Authorizations, 2010 & 2015

Pay Grade	Current	Projected
	Year, 2010	Year, 2015
	Total	Total
O7+	-	-
O6	8	7
O5	70	44
O4	104	58
O3	229	193
O2	125	123
O1	33	32
Officers	569	457
E9	29	25
E8	78	68
E7	400	353
E6	647	566
E5	1,187	1,065
E4	981	969
E3	707	704
E2	85	84
E1	81	80
Enlisted	4,195	3,914
Total	4,764	4,371

Military family housing requirements are based on the number of military families (Table 3-2). The IMRD provides estimates of the number of military families and unaccompanied personnel. These estimates are based on historical average demographics for Seymour Johnson AFB.

**Table 3-2. Seymour Johnson AFB
Manpower Demographics, 2010 & 2015**

	Current Year, 2010	Projected Year, 2015
Total Authorized	4,764	4,371
Military Families	2,444	2,176
Unaccompanied Personnel	1,782	1,705

3.2 MILITARY FAMILY HOUSING REQUIREMENTS

Military family housing requirements are the number of military families that the installation has the responsibility to house. Military family housing requirements are based on the grade, family size, and composition of household. Bedroom requirements are based on one bedroom per dependent child and a minimum bedroom requirement by rank. Junior enlisted and company grade officer families require a minimum of a two-bedroom unit, while families of senior noncommissioned officers and field grade officers require a minimum of a three-bedroom unit and senior officers require a minimum of a four-bedroom unit. The family size is estimated from the composition of the personnel currently assigned to the installation.

In 2010, there are 2,444 military families that require housing. There are 2,176 military families projected to require housing for 2015 (Table 3-3). Approximately 53.8 percent of the families are entitled to two-bedroom housing while 33.9 percent have a three-bedroom requirement and 12.3 percent have a four or more bedroom requirement.

Table 3-3. Military Family Housing Requirements, 2015

Pay Grade	Number of Bedrooms			Total
	Two	Three	Four+	
O7+	-	-	-	-
O6	-	-	6	6
O5	-	27	13	40
O4	-	34	9	43
O3	83	22	11	116
O2	32	9	1	42
O1	7	3	1	11
Officers	122	95	41	258
E9	-	16	2	18
E8	-	50	9	59
E7	-	221	57	278
E6	201	152	80	433
E5	389	147	65	601
E4	283	43	12	338
E3	146	6	3	155
E2	15	3	-	18
E1	14	4	-	18
Enlisted	1,048	642	228	1,918
Total	1,170	737	269	2,176

3.3 UNACCOMPANIED PERSONNEL HOUSING REQUIREMENTS

Unaccompanied personnel housing requirements are the number of unaccompanied households that the installation housing office has the responsibility to house. Bedroom requirements for unaccompanied personnel requiring housing in the private sector vary from one to three bedrooms based on OSD standards. Grade E5 and below have a one-bedroom requirement, while grades E6 to O3 have a two-bedroom requirement. Grade O4 and above have a three-bedroom requirement.

There are a total of 1,782 permanent party unaccompanied service members for whom Seymour Johnson AFB has the responsibility to house in 2010. In 2015, there are projected to be a total of 1,705 unaccompanied service members (Table 3-4).

Table 3-4. Unaccompanied Personnel Housing Requirements, 2015

Pay Grade	Number of Bedrooms			Total
	One	Two	Three	
O7+	-	-	-	-
O6	-	-	-	-
O5	-	-	1	1
O4	-	-	9	9
O3	-	61	-	61
O2	-	72	-	72
O1	-	19	-	19
Officers	-	152	10	162
E9	-	3	-	3
E8	-	1	-	1
E7	-	25	-	25
E6	-	64	-	64
E5	315	-	-	315
E4	527	-	-	527
E3	493	-	-	493
E2	59	-	-	59
E1	56	-	-	56
Enlisted	1,450	93	-	1,543
Total	1,450	245	10	1,705

4.0 MINIMUM MILITARY HOUSING REQUIREMENTS

Air Force policy establishes minimum housing requirements for military families and unaccompanied personnel. The Minimum Housing Requirement for military families is based on the greatest of three specific criteria on the basis of pay grade. For unaccompanied personnel, current Air Force policy requires personnel in grade E3 and below and grade E4 with less than three years of service to reside in government quarters. This chapter reports the minimum military housing requirements at Seymour Johnson AFB in the following sections:

- Military Family Minimum Housing Requirement
- Unaccompanied Personnel Minimum Housing Requirement

4.1 MILITARY FAMILY MINIMUM HOUSING REQUIREMENT

In the projected year of the analysis, the installation is assumed to house only its Military Family Minimum Housing Requirement. As a result, all military family rental demand in excess of the Military Family Minimum Housing Requirement requires private sector housing in 2015. The Military Family Minimum Housing Requirement is determined by the greatest of the following three criteria on the basis of pay grade:

- **Military Community** – Housing for ten percent of the military families by pay grade is established in recognition the value of the cohesive attributes of a military community to the morale of its members.

In 2015, there is a military community housing requirement of 219 housing units based on 2,176 military families (Table 4-1).

- **Key and Essential** – Housing for all key and essential military and civilian personnel.

Currently, there are 37 key and essential positions at Seymour Johnson AFB. These positions are expected to remain unchanged in the projected year of the analysis (Table 4-2).

- **Historic Housing** – On-base housing units listed on or eligible for the National Register of Historic Places under the National Historic Preservation Act.

At Seymour Johnson AFB, there are currently no housing units designated as historic housing (Table 4-3).

The Military Family Minimum Housing Requirement is the greatest of the Military Community, Key and Essential, and Historic Housing Requirements on the basis of pay grade. The Military Family Minimum Housing Requirement or Military Family Floor Housing Requirement for Seymour Johnson AFB is 249 housing units in 2015 (Table 4-4). The bedroom requirements for each pay grade are set by the bedroom requirements of the criterion on which the minimum is based for that pay grade.

Table 4-1. Military Community Housing Requirement, 2015

Pay Grade	Number of Bedrooms			Total
	Two	Three	Four+	
O7+	-	-	-	-
O6	-	-	1	1
O5	-	3	1	4
O4	-	3	1	4
O3	9	2	1	12
O2	3	1	-	4
O1	1	-	-	1
Officers	13	9	4	26
E9	-	2	-	2
E8	-	5	1	6
E7	-	22	6	28
E6	20	15	8	43
E5	39	15	6	60
E4	29	4	1	34
E3	15	1	-	16
E2	2	-	-	2
E1	2	-	-	2
Enlisted	107	64	22	193
Total	120	73	26	219

Table 4-2. Key and Essential Housing Requirement, 2015

Pay Grade	Number of Bedrooms			Total
	Two	Three	Four+	
O7+	-	-	-	-
O6	-	-	7	7
O5	-	17	8	25
O4	-	-	-	-
O3	-	-	-	-
O2	-	-	-	-
O1	-	-	-	-
Officers	-	17	15	32
E9	-	-	5	5
E8	-	-	-	-
E7	-	-	-	-
E6	-	-	-	-
E5	-	-	-	-
E4	-	-	-	-
E3	-	-	-	-
E2	-	-	-	-
E1	-	-	-	-
Enlisted	-	-	5	5
Total	-	17	20	37

Table 4-3. Historic Housing Requirement, 2015

Pay Grade	Number of Bedrooms			Total
	Two	Three	Four+	
O7+	-	-	-	-
O6	-	-	-	-
O5	-	-	-	-
O4	-	-	-	-
O3	-	-	-	-
O2	-	-	-	-
O1	-	-	-	-
Officers	-	-	-	-
E9	-	-	-	-
E8	-	-	-	-
E7	-	-	-	-
E6	-	-	-	-
E5	-	-	-	-
E4	-	-	-	-
E3	-	-	-	-
E2	-	-	-	-
E1	-	-	-	-
Enlisted	-	-	-	-
Total	-	-	-	-

Table 4-4. Military Family Minimum Housing Requirement, 2015

Pay Grade	Number of Bedrooms			Total
	Two	Three	Four+	
O7+	-	-	-	-
O6	-	-	7	7
O5	-	17	8	25
O4	-	3	1	4
O3	9	2	1	12
O2	3	1	-	4
O1	1	-	-	1
Officers	13	23	17	53
E9	-	-	5	5
E8	-	5	1	6
E7	-	22	6	28
E6	20	15	8	43
E5	39	15	6	60
E4	29	4	1	34
E3	15	1	-	16
E2	2	-	-	2
E1	2	-	-	2
Enlisted	107	62	27	196
Total	120	85	44	249

4.2 UNACCOMPANIED PERSONNEL MINIMUM HOUSING REQUIREMENT

The Unaccompanied Personnel Minimum Housing Requirement is established by Air Force policy which requires that unaccompanied personnel in grade E4 with less than three years of service and grade E3 and below reside in government-furnished quarters. In 2015, the projected year of the analysis, 740 unaccompanied personnel will require government quarters (Table 4-5).

Table 4-5. Unaccompanied Personnel Minimum Housing Requirement, 2015

Pay Grade	Unaccompanied Personnel	Minimum Housing Requirement
E4	527	132
E3	493	493
E2	59	59
E1	56	56
Enlisted	1,135	740
Total	1,135	740

5.0 COMPETING DEMAND

In the final year of the planning period, military families in excess of the Military Family Minimum Housing Requirement and unaccompanied personnel in excess of the Unaccompanied Personnel Minimum Housing Requirement will require housing in the private sector. The military family and unaccompanied personnel shares of the suitable rental housing supply are determined by the housing competition in each market segment. With military homeowners assumed to be suitably housed, military family and unaccompanied personnel who require rental housing compete with the civilian household demand for shares of the effective rental housing supply in each market segment. The competing demand for private sector rental housing is described in the following sections:

- Military Families Requiring Rental Housing
- Unaccompanied Personnel Requiring Rental Housing
- Civilian Rental Demand

5.1 MILITARY FAMILIES REQUIRING RENTAL HOUSING

In 2015, the final year of the planning period, an estimated 1,927 military families will require housing in the private sector (Table 5-1). Their requirements by bedroom (Table 5-2) are based on the current distribution.

Table 5-1. Military Families Requiring Housing, 2015

	2015
Military Families	2,176
Minimum Housing Requirement	249
In Private Sector	1,927

Table 5-2. Military Families Requiring Private Sector Housing, 2015

Pay Grade	Number of Bedrooms			Total
	Two	Three	Four+	
O7+	-	-	-	-
O6	-	-	-	-
O5	-	10	5	15
O4	-	31	8	39
O3	74	20	10	104
O2	29	8	1	38
O1	6	3	1	10
Officers	109	72	25	206
E9	-	16	-	16
E8	-	45	8	53
E7	-	199	48	247
E6	181	137	72	390
E5	350	132	59	541
E4	254	39	11	304
E3	131	5	3	139
E2	13	3	-	16
E1	12	3	-	15
Enlisted	941	579	201	1,721
Total	1,050	651	226	1,927

In the private sector, military families will either become homeowners or require rental housing. Ownership rates are used to estimate owner-occupied demand for military families. Ownership can be expected to vary with income, allowances, mortgage interest rates, and the general price level of the real estate market. Military households currently occupying government-controlled or privatized units are assumed to become renters of private sector housing if government-controlled or privatized housing were no longer available.

Due to the accelerated nature of this HRMA, AF/A7CAH directed that an Air Force Housing Survey not be conducted and to apply homeownership rates used in the 2005 Seymour Johnson HRMA. The homeownership rates applied in the 2005 HRMA were based on 1997 Variable Housing Allowance (VHA) survey data (Table 5-3). Military family homeownership rates are based military households living off-base within their respective pay grade and are assumed to remain at their 2010 levels over the study period.

Table 5-3. Homeownership Rates for Military Families

Pay Grade	Percentage Homeowners	Percentage Renters
O7+	0.0%	100.0%
O6	50.0%	50.0%
O5	90.0%	10.0%
O4	80.7%	19.4%
O3	85.3%	14.8%
O2	35.7%	64.3%
O1	33.3%	66.7%
E9	100.0%	0.0%
E8	96.8%	3.2%
E7	89.9%	10.1%
E6	84.2%	15.8%
E5	76.3%	23.7%
E4	42.2%	57.8%
E3	20.8%	79.2%
E2	0.0%	100.0%
E1	0.0%	100.0%

For the projected year of the analysis, 1,196 families are estimated to require homeowner housing and the remaining 731 families are expected to require rental housing (Tables 5-4 and 5-5). Approximately 57.3 percent of the rental requirements will be in the two-bedroom category, while three- and four-bedroom rental requirements will respectively account for 35.6 and 7.1 percent of the total rental demand.

Table 5-4. Military Family Homeowner Requirement, 2015

Pay Grade	Total
O7+	-
O6	-
O5	10
O4	24
O3	93
O2	12
O1	1
Officers	140
E9	16
E8	51
E7	235
E6	311
E5	330
E4	103
E3	10
E2	-
E1	-
Enlisted	1,056
Total	1,196

Table 5-5. Military Family Rental Requirement, 2015

Pay Grade	Number of Bedrooms			Total
	Two	Three	Four+	
O7+	-	-	-	-
O6	-	-	-	-
O5	-	-	5	5
O4	-	7	8	15
O3	7	3	1	11
O2	20	5	1	26
O1	6	2	1	9
Officers	33	17	16	66
E9	-	-	-	-
E8	-	-	2	2
E7	-	1	11	12
E6	13	60	6	79
E5	70	132	9	211
E4	156	39	6	201
E3	122	5	2	129
E2	13	3	-	16
E1	12	3	-	15
Enlisted	386	243	36	665
Total	419	260	52	731

There are many external factors that affect housing choices. However, the objective of an HRMA is to assess if there is sufficient affordable private sector housing of acceptable quality. For the purposes of this analysis, in order to determine the military households' market share of suitable housing, military families requiring rental housing are allocated to rental market segments within a spending band for their pay grade and bedroom entitlement. While the MAHC defines the highest affordable cost, a minimum suitable rental cost by bedroom is established to represent the minimum cost for suitable rental units setting the lower limits of spending bands for each pay grade (Table 5-6).

Table 5-6. MAHC With Dependents and Minimum Housing Cost, 2010

Pay Grade	MAHC/BAH	Minimum Housing Cost by Number of Bedrooms ¹		
		Two	Three	Four+
O7+	\$1,854	-	-	\$1,077
O6	\$1,836	-	-	\$1,077
O5	\$1,818	-	\$888	\$1,077
O4	\$1,710	-	\$888	\$1,077
O3	\$1,557	\$638	\$888	\$1,077
O2	\$1,293	\$638	\$888	\$1,077
O1	\$1,086	\$638	\$888	\$1,077
E9	\$1,602	\$638	\$888	\$1,077
E8	\$1,497	\$638	\$888	\$1,077
E7	\$1,392	\$638	\$888	\$1,077
E6	\$1,299	\$638	\$888	\$1,077
E5	\$1,059	\$638	\$888	\$1,077
E4	\$996	\$638	\$888	\$1,077
E3	\$996	\$638	\$888	\$1,077
E2	\$996	\$638	\$888	\$1,077
E1	\$996	\$638	\$888	\$1,077

Service members are allocated to market segments between the minimum cost and their MAHC (Table 5-7). Military households with a MAHC insufficient to meet the minimum cost are assumed to become a private sector shortfall. The analysis assumes that rental costs are constant over the study period.

¹ Includes rent, utility costs, and renter's insurance

Table 5-7. Military Family Rental Requirement by Price Category, 2015

Rental Cost ¹	Number of Bedrooms			Total
	Two	Three	Four+	
\$1,900 & Above	-	-	-	-
\$1,700 - \$1,899	-	-	-	-
\$1,500 - \$1,699	-	1	2	3
\$1,300 - \$1,499	-	1	4	5
\$1,100 - \$1,299	2	26	25	53
\$1,000 - \$1,099	5	61	13	79
\$900 - \$999	70	151	8	229
\$800 - \$899	107	20	-	127
\$700 - \$799	154	-	-	154
\$600 - \$699	81	-	-	81
\$500 - \$599	-	-	-	-
Below \$500	-	-	-	-
Total	419	260	52	731

5.2 UNACCOMPANIED PERSONNEL REQUIRING RENTAL HOUSING

Unaccompanied personnel requiring private sector housing are all personnel not required to live in military quarters per Air Force policy (Table 5-8).

Table 5-8. Unaccompanied Personnel Requiring Housing, 2015

	2015
Unaccompanied Personnel	1,705
In Government Quarters	740
In Private Sector	965

For the projected year of the analysis, there are 965 unaccompanied personnel who are not required to reside in military quarters and compete against civilian and military families seeking private sector housing (Table 5-9).

¹ Includes rent, utility costs, and renter's insurance

Table 5-9. Unaccompanied Personnel Private Sector Housing Requirement, 2015

Pay Grade	Number of Bedrooms			Total
	One	Two	Three	
O7+	-	-	-	-
O6	-	-	-	-
O5	-	-	1	1
O4	-	-	9	9
O3	-	61	-	61
O2	-	72	-	72
O1	-	19	-	19
Officers	-	152	10	162
E9	-	3	-	3
E8	-	1	-	1
E7	-	25	-	25
E6	-	64	-	64
E5	315	-	-	315
E4	395	-	-	395
E3	-	-	-	-
E2	-	-	-	-
E1	-	-	-	-
Enlisted	710	93	-	803
Total	710	245	10	965

Unaccompanied personnel who elect to purchase homes are considered suitably housed and do not compete in the rental housing market. The proportion of unaccompanied personnel who seek rental housing in the private sector is estimated from homeownership rates applied in the 2005 Seymour Johnson AFB HRMA (Table 5-10).

Table 5-10. Homeownership Rates for Unaccompanied Personnel

Pay Grade	Percentage Homeowners	Percentage Renters
O7+	0.0%	100.0%
O6	0.0%	100.0%
O5	50.0%	50.0%
O4	42.9%	57.1%
O3	33.3%	66.7%
O2	0.0%	100.0%
O1	12.5%	87.5%
E9	100.0%	0.0%
E8	50.0%	50.0%
E7	40.0%	60.0%
E6	25.0%	75.0%
E5	12.9%	87.1%
E4	3.6%	96.4%
E3	0.0%	100.0%
E2	0.0%	100.0%
E1	0.0%	100.0%

An estimated 112 unaccompanied service members will require homeowner housing (Table 5-11), and 853 unaccompanied service members will require rental housing (Table 5-12).

Table 5-11. Unaccompanied Personnel Homeowner Requirement, 2015

Pay Grade	Total
O7+	-
O6	-
O5	1
O4	4
O3	20
O2	-
O1	2
Officers	27
E9	3
E8	1
E7	10
E6	16
E5	41
E4	14
E3	-
E2	-
E1	-
Enlisted	85
Total	112

Table 5-12. Unaccompanied Personnel Rental Requirement, 2015

Pay Grade	Number of Bedrooms			Total
	One	Two	Three	
O7+	-	-	-	-
O6	-	-	-	-
O5	-	-	-	-
O4	-	-	5	5
O3	-	41	-	41
O2	-	72	-	72
O1	-	17	-	17
Officers	-	130	5	135
E9	-	-	-	-
E8	-	-	-	-
E7	-	15	-	15
E6	-	48	-	48
E5	274	-	-	274
E4	381	-	-	381
E3	-	-	-	-
E2	-	-	-	-
E1	-	-	-	-
Enlisted	655	63	-	718
Total	655	193	5	853

MAHC sets the upper limit of affordable housing for unaccompanied personnel (Table 5-13). Unaccompanied personnel are allocated to the rental housing market segments based on their assumed expenditures estimates by the personnel within each pay grade (Table 5-14). The analysis assumes that rental costs are constant over the study period.

Table 5-13. MAHC Without Dependents and Minimum Housing Cost, 2010

Pay Grade	MAHC/BAH	Minimum Housing Cost by Number of Bedrooms ¹		
		One	Two	Three
O7+	\$1,593	-	-	\$888
O6	\$1,560	-	-	\$888
O5	\$1,464	-	\$638	\$888
O4	\$1,404	-	\$638	\$888
O3	\$1,212	\$524	\$638	\$888
O2	\$1,038	\$524	\$638	\$888
O1	\$936	\$524	\$638	\$888
E9	\$1,200	\$524	\$638	\$888
E8	\$1,122	\$524	\$638	\$888
E7	\$1,044	\$524	\$638	\$888
E6	\$975	\$524	\$638	\$888
E5	\$867	\$524	\$638	\$888
E4	\$747	\$524	\$638	\$888
E3	\$747	\$524	\$638	\$888
E2	\$747	\$524	\$638	\$888
E1	\$747	\$524	\$638	\$888

Table 5-14. Unaccompanied Personnel Rental Requirement by Price Category, 2015

Rental Cost ¹	Number of Bedrooms			Total
	One	Two	Three	
\$1,900 & Above	-	-	-	-
\$1,700 - \$1,899	-	-	-	-
\$1,500 - \$1,699	-	-	-	-
\$1,300 - \$1,499	-	-	-	-
\$1,100 - \$1,299	-	1	2	3
\$1,000 - \$1,099	-	5	1	6
\$900 - \$999	-	29	2	31
\$800 - \$899	23	50	-	73
\$700 - \$799	75	70	-	145
\$600 - \$699	293	38	-	331
\$500 - \$599	264	-	-	264
Below \$500	-	-	-	-
Total	655	193	5	853

¹ Includes rent, utility costs, and renter's insurance

5.3 CIVILIAN RENTAL DEMAND

Civilian housing demand is comprised of the housing demand by civilian households residing within the housing market area and any military personnel residing in the area who are not a housing responsibility of the installation. Housing demand by these households is determined by their housing decisions based on factors such as income, location, and personal preferences. The civilian rental housing demand projected for 2015 is 29,701 (Table 5-15).

Table 5-15. Civilian Rental Demand, 2015

Rental Cost ¹	Number of Bedrooms					Total
	None	One	Two	Three	Four+	
\$1,900 & Above	-	3	18	58	20	99
\$1,700 - \$1,899	-	3	17	58	15	93
\$1,500 - \$1,699	1	8	40	146	22	217
\$1,300 - \$1,499	1	14	82	238	35	370
\$1,100 - \$1,299	-	44	303	650	88	1,085
\$1,000 - \$1,099	2	69	445	517	63	1,096
\$900 - \$999	6	142	867	760	94	1,869
\$800 - \$899	10	240	1,420	1,009	150	2,829
\$700 - \$799	18	315	2,214	1,234	187	3,968
\$600 - \$699	57	666	2,366	1,133	171	4,393
\$500 - \$599	67	1,029	1,986	1,059	153	4,294
Below \$500	344	3,485	3,593	1,727	239	9,388
Total	506	6,018	13,351	8,589	1,237	29,701

¹ Includes rent, utility costs, and renter's insurance

6.0 EFFECTIVE RENTAL HOUSING SUPPLY

In this analysis, the Total Military Housing Requirement is based on the manpower and housing supply in 2015, the final year of the five-year planning period. This chapter describes the housing supply available to military households in 2015. While homeowner occupied housing is presented, military homeowners are assumed to be suitably housed for the purposes of the analysis.

The focus of the analysis is the effective rental supply including only those rental units which are affordable and suitable for the military costing no more than their housing allowance and meeting their bedroom requirements. The effective rental housing supply is derived from estimates of the total rental supply and suitable housing in the following sections:

- Private Sector Housing
- Homeowner Housing Supply
- Effective Rental Housing Supply

6.1 PRIVATE SECTOR HOUSING

Private sector housing includes both homeowner housing as well as rental housing within the Housing Market Area. The private sector housing inventory is estimated to increase by 0.5 percent annually through 2015 to a total of 102,496 units, including 69,794 homeowner units and 32,702 rental units (Table 6-1). The effective rental market includes only those rental units which military households are eligible to rent and are affordable and suitable with a rental cost not exceeding their housing allowances while meeting their bedroom requirements.

Table 6-1. Private Sector Housing in the Housing Market Area, 2015

Housing Ownership	2015
Homeowner Housing	69,794
Rental Housing	32,702
Effective Supply	8,016
Percent of Total Rental Supply	25%
Total	102,496

6.2 HOMEOWNER HOUSING SUPPLY

Homeowner housing is estimated to grow at 0.5 percent annually, reaching 69,794 units by 2015. All owner-occupied housing, with the exception of mobile homes, is considered suitable for military personnel.

6.3 EFFECTIVE RENTAL HOUSING SUPPLY

The effective rental supply is comprised of the rental housing units that are affordable and suitable to the military households. The effective supply does not include housing that is more costly than the highest BAH rates for the installation nor below the cost of a minimally acceptable housing unit. The effective rental supply also does not include any efficiency units as they would not satisfy the bedroom entitlement of military families or unaccompanied personnel.

The determination of the effective rental supply starts with the total rental supply. Restricted rental units, for which the military households are not eligible, are first removed from the total supply. The effective rentals are further reduced by the removal of unsuitable units. Suitability is addressed from the perspective of

- Housing Type,
- Unsuitable Housing Areas,
- Housing Condition.

Finally, suitability is further limited in terms of cost by the housing allowance and the bedroom entitlement of the military members requiring private sector housing.

6.3.1 TOTAL RENTAL HOUSING SUPPLY

The total rental supply in the Housing Market Area by 2015 is estimated at 32,702 units. Two-bedroom and smaller units make up 67.9 percent of rental housing supply (Table 6-2). Three-bedroom units make up 27.9 percent of rental housing and the remaining 4.2 percent have four or more bedrooms.

Table 6-2. Rental Housing Supply, 2015

Rental Cost ¹	Number of Bedrooms					Total
	None	One	Two	Three	Four+	
\$1,900 & Above	-	3	17	52	17	89
\$1,700 - \$1,899	-	3	16	56	16	91
\$1,500 - \$1,699	1	8	38	151	22	220
\$1,300 - \$1,499	1	14	80	237	37	369
\$1,100 - \$1,299	-	42	308	646	104	1,100
\$1,000 - \$1,099	2	66	462	542	73	1,145
\$900 - \$999	6	136	961	713	94	1,910
\$800 - \$899	11	280	1,545	985	135	2,956
\$700 - \$799	16	420	2,355	1,318	205	4,314
\$600 - \$699	58	970	2,571	1,201	182	4,982
\$500 - \$599	73	1,354	2,170	1,182	177	4,956
Below \$500	367	3,755	4,098	2,051	299	10,570
Total	535	7,051	14,621	9,134	1,361	32,702

¹ Includes rent, utility costs, and renter's insurance

6.3.2 RESTRICTED RENTAL HOUSING

Income and age restrictions are the most common limiting factors for units that have eligibility restrictions. In general, military households do not meet these requirements or when they do, the waiting lists are excessively long in relation to the member's tour of duty at a location so that such housing is not an option for the eligible military household. As such these rental units are assumed not to be available to military households.

6.3.3 SUITABLE RENTAL HOUSING

The effective rental supply only includes housing that is determined to be affordable and suitable for military personnel. In general, suitability is a function of location (i.e., within the Housing Market Area), health and safety concerns, and level of quality. From the individual military household perspective, the housing must be affordable in that it does not exceed the member's housing allowance and must meet the household's bedroom requirement.

Determinations of rental housing suitability within the Seymour Johnson AFB Housing Market Area is based on discussions with the installation housing office personnel, interviews with local property managers and realtors, surveys of the local community, and other published data. Housing must meet the general suitability factors, have enough bedrooms to meet the minimum bedroom entitlement, and not exceed the maximum BAH rates for each bedroom category.

Location and cost are two important criteria used in determining suitability. The HRMA process does not permit extensive surveying or inspection of the individual housing units. Housing may have similar conditions based on their location. Common age and type of construction, transportation, level of crime, health and safety factors, coupled with close proximity, may permit classifying housing suitability by a geographic area. Rental cost may serve as a proxy for housing condition. Other things being equal, lower cost housing will generally have fewer amenities and reduced qualities than more expensive housing. A rental cost that represents the lowest cost for a minimally acceptable housing unit is used to set the lower limit of rental housing suitability.

6.3.3.1 Air Force General Suitability Factors

Air Force standards for judging suitability of private sector housing are based on DoD 4165.63-M (U.S. Department of Defense, 1993) as interpreted by the Air Force (Figure 6-1). Housing must be within the Housing Market Area for the installation and not in an area designated by the base commander as unacceptable for health or safety reasons. Housing must be no more expensive than the Basic Allowance for Housing for each pay grade as determined by DoD based upon the local median housing cost.

Figure 6-1. Air Force General Suitability Factors

- Housing must be well maintained and structurally sound.
- Housing must not pose a health or safety hazard.
- Housing must be a complete unit with private entrance, bathroom, and kitchen for the sole use of its occupants.
- Rooms must be arranged so that the kitchen, a bathroom, the living room, and bedrooms can be entered without passing through bedrooms.
- Units must have air conditioning or a similar cooling system and a permanently-installed, adequately-vented heating system if the installation is located in a climate where these are to be included in U.S. Government construction by DoD standards.
- Housing must have adequate electrical service with washer/dryer connections or accessible laundry facilities on the premises.
- Unit must have hot and cold running potable water and sufficient sanitary and sewage disposal facilities.
- Mobile homes, even if owner-occupied, are not considered suitable housing for military personnel.

Source: DoD 4165.63-M U.S. Department of Defense, 1993

6.3.3.2 Unsuitable Housing Types

By policy, mobile home units are considered unsuitable housing for military personnel. 2000 U.S. Census data provides estimates of rental mobile home totals and price bedroom composition.

6.3.3.3 Unsuitable Housing Areas

For the purposes of this analysis, rental housing within the Housing Market Area is considered unsuitable for military households if it falls within a geographical area that is characteristic of conditions that would present health and safety concerns. Some of these conditions include a high rate of violent crime against persons or property, an industrial area and/or high commercial density, and extreme decay in neighborhood condition. According to the *American Housing Survey*, neighborhood conditions that could signify problems include long-term problems with trash accumulation, major street repairs, bared windows, broken windows, vandalized property, and boarded/abandoned properties.

Unsuitable areas were estimated for this analysis by considering data provided by Seymour Johnson AFB housing office and published crime data. Applied unsuitable areas are defined for analytical purposes only.

6.3.3.4 Unsuitable Housing Condition

Housing units that are unsuitable for military households are not limited to unsuitable areas or of an unsuitable housing type. As a house by house survey for suitability is beyond the scope of this HRMA, housing cost is applied as a proxy for suitability. In a competitive market, rental costs reflect the housing quality other things being equal. The rental costs by number of bedroom categories are estimated to establish the minimum costs per month in order for a military member to secure housing of a minimum acceptable quality (Table 6-3). As such, any private sector rental units below the defined minimum limits are considered unsuitable for military members.

Table 6-3. Minimum Acceptable Costs by Bedroom, 2015

Number of Bedrooms	Minimum Rent ¹	Total Average Utility Costs ²	Rental Insurance	Minimum Costs
One	\$400	\$114	\$10	\$524
Two	\$450	\$171	\$18	\$638
Three	\$650	\$213	\$25	\$888
Four+	\$850	\$194	\$33	\$1,077

6.3.4 EFFECTIVE RENTAL SUPPLY

The effective rental housing supply in the Housing Market Area is estimated at 8,016 units in 2015 (Table 6-4). These are the affordable, suitable rental housing units for the military households, both families and unaccompanied personnel. Only rental housing costing less than the highest BAH rate for each bedroom category is included.

Table 6-4. Effective Rental Housing Supply, 2015

Rental Cost ³	Number of Bedrooms				Total
	One	Two	Three	Four+	
\$1,900 & Above	-	-	-	-	-
\$1,700 - \$1,899	-	-	41	12	53
\$1,500 - \$1,699	-	30	136	18	184
\$1,300 - \$1,499	-	49	202	31	282
\$1,100 - \$1,299	-	187	520	80	787
\$1,000 - \$1,099	-	310	398	12	720
\$900 - \$999	-	703	475	-	1,178
\$800 - \$899	170	1,039	62	-	1,271
\$700 - \$799	210	1,486	-	-	1,696
\$600 - \$699	549	803	-	-	1,352
\$500 - \$599	493	-	-	-	493
Below \$500	-	-	-	-	-
Total	1,422	4,607	1,834	153	8,016

¹ Minimum rent estimates are based on Seymour Johnson AFB provided AHRN listings from March 18, 2010.

² Average cost estimates are based on 2010 HUD Allowances for Tenant Furnished Utilities for Goldsboro, NC.

³ Includes rent, utility costs, and renter's insurance

7.0 TOTAL MILITARY FAMILY HOUSING REQUIREMENT

This chapter summarizes the determination of the Total Military Family Housing Requirement for Seymour Johnson AFB. The Private Sector Shortfall of 297 units coupled with the 249 unit Military Family Minimum Housing Requirement results in a Total Military Family Housing Requirement of 546 units.

7.1 PRIVATE SECTOR SHORTFALL

Military households in excess of the Minimum Housing Requirement for their accompaniment status are assumed to require private sector rental housing. Military households that own their housing are assumed to be suitably housed.

For military households requiring rental housing, the sufficiency of the market to meet their requirements is determined through an allocation process which determines the military's share of the suitable rental housing for each accompaniment status. The allocation of the available, suitable supply for the military is based on a competitive market share concept. In each market segment, the military households compete against the civilian and other households who may also require rental housing in the market area. Each competing group is allocated their proportionate share of the suitable rental units.

The Private Sector Shortfall is determined as the difference between the military households requiring rental housing and the share of rental housing allocated to military households.

7.1.1 SUITABLE MARKET SUPPLY ALLOCATED TO THE MILITARY

The allocation of suitable rental housing to the military families requiring rental housing is shown in Table 7-1. The analysis indicates that 434 military families would be allocated suitable rental units. There is still an additional requirement, or shortfall, of 297 suitable community rentals for Seymour Johnson AFB in excess of its Military Family Minimum Housing Requirement in 2015.

Table 7-1. Market Allocation of Suitable Rental Housing

Military Families	731
Allocated Suitable Housing	434
Private Sector Shortfall	297

7.1.2 PRIVATE SECTOR HOUSING SHORTFALL

As determined by the allocation analysis, the Private Sector Shortfall of 297 units for military families is presented in Table 7-2.

Table 7-2. Private Sector Shortfall for Military Families

Rental Cost ¹	Number of Bedrooms			Total
	Two	Three	Four+	
\$1,900 & Above	-	-	-	-
\$1,700 - \$1,899	-	-	-	-
\$1,500 - \$1,699	-	-	-	-
\$1,300 - \$1,499	-	-	1	1
\$1,100 - \$1,299	1	7	7	15
\$1,000 - \$1,099	2	20	11	33
\$900 - \$999	21	73	8	102
\$800 - \$899	36	15	-	51
\$700 - \$799	60	-	-	60
\$600 - \$699	35	-	-	35
\$500 - \$599	-	-	-	-
Below \$500	-	-	-	-
Total	155	115	27	297

7.2 TOTAL MILITARY FAMILY HOUSING REQUIREMENT

The Military Family Minimum Housing Requirement is comprised of the Community Housing Requirement, the Key and Essential Housing Requirement, and the Historic Housing Requirement (Table 7-3). About 90.9 percent of the 297 unit Private Sector Shortfall is in two and three bedroom units with the remaining 9.1 percent in four bedrooms units (Table 7-4). The Total Military Family Housing Requirement by bedroom category is the sum of the Military Family Minimum Housing Requirement and the Private Sector Shortfall (Table 7-5).

¹ Includes rent, utility costs, and renter's insurance

Table 7-3. Total Military Family Housing Requirement Summary

Pay Grade	Military Families	Military Community	Key & Essential	Historic Housing	Minimum Housing Requirement	Private Sector Shortfall	Total Military Housing Requirement
O7+	-	-	-	-	-	-	-
O6	6	1	7	-	7	-	7
O5	40	4	25	-	25	1	26
O4	43	4	-	-	4	4	8
O3	116	12	-	-	12	3	15
O2	42	4	-	-	4	11	15
O1	11	1	-	-	1	2	3
Officers	258	26	32	-	53	21	74
E9	18	2	5	-	5	-	5
E8	59	6	-	-	6	1	7
E7	278	28	-	-	28	4	32
E6	433	43	-	-	43	30	73
E5	601	60	-	-	60	96	156
E4	338	34	-	-	34	84	118
E3	155	16	-	-	16	49	65
E2	18	2	-	-	2	6	8
E1	18	2	-	-	2	6	8
Enlisted	1,918	193	5	-	196	276	472
Total	2,176	219	37	-	249	297	546

Table 7-4. Military Family Private Sector Shortfall

Pay Grade	Number of Bedrooms			Total
	Two	Three	Four+	
O7+	-	-	-	-
O6	-	-	-	-
O5	-	-	1	1
O4	-	2	2	4
O3	2	1	-	3
O2	8	3	-	11
O1	1	1	-	2
Officers	11	7	3	21
E9	-	-	-	-
E8	-	-	1	1
E7	-	-	4	4
E6	5	23	2	30
E5	27	60	9	96
E4	58	20	6	84
E3	44	3	2	49
E2	5	1	-	6
E1	5	1	-	6
Enlisted	144	108	24	276
Total	155	115	27	297

Table 7-5. Total Military Family Housing Requirement

Pay Grade	Number of Bedrooms			Total
	Two	Three	Four+	
O7+	-	-	-	-
O6	-	-	7	7
O5	-	17	9	26
O4	-	5	3	8
O3	11	3	1	15
O2	11	4	-	15
O1	2	1	-	3
Officers	24	30	20	74
E9	-	-	5	5
E8	-	5	2	7
E7	-	22	10	32
E6	25	38	10	73
E5	66	75	15	156
E4	87	24	7	118
E3	59	4	2	65
E2	7	1	-	8
E1	7	1	-	8
Enlisted	251	170	51	472
Total	275	200	71	546

8.0 SUMMARY

This chapter summarizes the HRMA Total Military Family Housing Requirement results for Seymour Johnson AFB.

Table 8-1. Military Family Housing Requirement Summary

Total Military Housing Requirements	Military Families
Military Households	2,176
Minimum Housing Requirement	249
Private Sector Shortfall	297
Total Military Housing Requirements	546

HOUSING MARKET AREA

Seymour Johnson AFB is located in Wayne County, North Carolina and is directly southeast of the City of Goldsboro.

HOUSING SUPPLY

There is a total private housing stock of 99,970 units, including 68,075 homeowner units and 31,895 rental units. At an estimated annual growth rate of 0.5 percent, the housing market would increase to 102,496 units in 2015.

Seymour Johnson AFB currently has 1,190 total military family housing units and is currently authorized and funded to reach an end-state of 898 units by 2015.

MILITARY HOUSING DEMAND

The Seymour Johnson AFB housing office is currently responsible for supporting 4,764 military personnel including tenant personnel. This number is expected to increase to 4,371 authorizations by 2015.

There are projected to be 2,176 military families and 1,705 unaccompanied personnel, of which 1,927 military families and 965 unaccompanied personnel will require private sector housing.

MILITARY FAMILY MINIMUM HOUSING REQUIREMENT

The Military Family Minimum Housing Requirement, based on the greater of each of its components by pay grade, totals 249 military housing units. The individual components are:

Military Community Housing Requirement

The on-base community criterion requires military housing for 10 percent of all military families by pay grade. This requirement is projected to total 219 housing units.

Key and Essential Housing Requirement

There are projected to be 37 key and essential positions at Seymour Johnson AFB.

Historic Housing Requirement

There are no historic housing units at Seymour Johnson AFB.

PRIVATE SECTOR SHORTFALL FOR MILITARY FAMILIES

There is a projected shortfall of 297 suitable private sector rental units for military families.

TOTAL MILITARY FAMILY HOUSING REQUIREMENT

The Total Military Family Housing Requirement based on the sum of the Military Family Minimum Housing Requirement and the Private Sector Shortfall by pay grade totals 546 military housing units.

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APPENDIX A – UNACCOMPANIED HOUSING REQUIREMENTS

Table A-1. Unaccompanied Housing Requirements History

Planning Year of HRMA Results	2006 Charleston AFB HRMA	2010 Charleston AFB HRMA	Total Change	Percent Change
UNACCOMPANIED PERSONNEL	1,863	1,705	(158)	(8.5%)
Minimum Housing Requirement	855	740	(115)	(13.5%)
Unaccompanied Homeowners	118	112	(6)	(5.1%)
Unaccompanied Renters	890	853	(37)	(4.2%)
Private Sector Shortfall	527	351	(176)	(33.4%)
TOTAL UNACCOMPANIED HOUSING REQUIREMENT	1,382	1,091	(291)	(21.1%)

Table A-2. Seymour Johnson AFB Total Unaccompanied Personnel Housing Requirement

Pay Grade	Unaccompanied Personnel	Minimum Housing Requirement	Require Private Sector Housing	Private Sector Shortfall	Total Military Housing Requirement
O7+	-	-	-	-	-
O6	-	-	-	-	-
O5	1	-	1	-	-
O4	9	-	9	2	2
O3	61	-	61	14	14
O2	72	-	72	27	27
O1	19	-	19	7	7
Officers	162	-	162	50	50
E9	3	-	3	-	-
E8	1	-	1	-	-
E7	25	-	25	5	5
E6	64	-	64	18	18
E5	315	-	315	114	114
E4	527	132	395	164	296
E3	493	493	-	-	493
E2	59	59	-	-	59
E1	56	56	-	-	56
Enlisted	1,543	740	803	301	1,041
Total	1,705	740	965	351	1,091