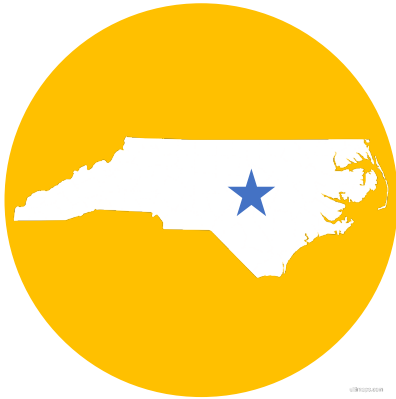


National Association of REALTORS®

NC – Wake County Housing

March 2026

Wake County Survey Methodology



500 (500 weighted)
Registered voters in
Wake County, NC



Wireless (183)
Non-wireless (32)
Online (285)



Interviews
Conducted
March 16 - 18, 2026

The overall margin of error is +/- 4.4%. The margin of error for subgroups is larger and varies. Percentage totals may not add up precisely due to rounding.

Demographics

Gender



Women
54%



Men
46%

Age

18-29: 19%
30-39: 17%
40-49: 18%
50-64: 24%
65+: 21%

Party Registration

Democrat: 33%
Unaffiliated: 46%
Republican: 21%

Owner/Renter

Homeowner: 67%
Renter: 22%
Lives w/Friends/Family: 11%

Education

Non-College Graduates: 33%
4 Yr. College Degree: 32%
Post-Graduate Degree: 34%

Ethnicity

White: 59%
African American: 17%
Hispanic: 6%
Asian: 6%
Other: 10%

Region by CCD

North (1,6) : 30%
Central (4,5,7): 40%
South (2,3): 30%

Executive Summary

Executive Summary

- **Wake County voters enjoy their quality of life, but a significant minority feel it has gotten worse in recent years.** Overall, voters report a high quality of life in Wake County, with nearly nine in ten describing it as excellent or good. However, 32 percent feel the quality of life has gotten worse in recent years while just 18 percent say it has improved; a plurality (49 percent) say it has remained the same.
- **Residential growth happening too fast.** Two-thirds of voters say the pace of residential growth and development in Wake County is happening too fast, with only thirty percent believing that growth is happening at the right pace and eight percent feeling that it is too slow. Women over the age of 50 overwhelmingly feel that growth is happening too fast (80 percent).
- **Housing affordability a bigger concern than housing availability.** Over three-quarters say the cost to buy or rent a home in Wake County is either a very big (43 percent) or fairly big (33 percent) problem. Housing availability – the number of houses or apartments available to buy or rent – is a lesser concern with just one-third calling it a very big (14 percent) or fairly big (21 percent) problem. One quarter see availability as a moderate problem.

Executive Summary

- **Already enough housing options.** Over six-in-ten (62 percent) say that there are already enough housing options (apartment buildings, town homes, duplexes and single-family homes) available to them. Only 35 percent say there are not enough different kinds of options available.
- **Slightly more concerned about housing costs than overall growth.** When forced to choose, just over half (54%) feel that the cost of housing is a more pressing issue than problems caused by growth (e.g. cost of living, increased traffic, etc.). Seniors are especially troubled by growth issues, while younger voters are more concerned about the cost of housing.
- **Residents hold conflicting views on need for more housing.** While most agree that there is a need for more affordable housing in their neighborhood (58 percent agree) and that more housing is needed to accommodate population growth (59 percent agree), voters are split as to whether the benefits of new housing outweigh the drawbacks (50 percent agree; 46 percent disagree) and doubt that building more housing will help reduce overall housing costs (44 percent agree; 54 percent disagree).

Executive Summary

- **Limited support for more dense developments.** Only 36 percent favor changing zoning laws in their community to allow for more dense development; a large majority are opposed (60 percent).
 - Young men are the only demographic to support changing zoning laws to allow for more dense development (57 percent support).
 - Voters over age 50 are broadly opposed to zoning reform, especially older women (79 percent opposed).
- **Increased traffic and higher property taxes are top concerns about density.** Six-in-ten (61 percent) are very concerned that more dense housing development will result in an increase in traffic and congestion (88 percent very or somewhat concerned). Almost half (45 percent) are very concerned that more housing will result in higher property taxes (77 percent very or somewhat concerned). Voters are also concerned that more housing will strain public services (75 percent very or somewhat concerned).
- **The most convincing arguments for increasing housing density and development are those tied to lifestyle, the environment and affordability.** Over half (56 percent) feel that the creation of mixed-use neighborhoods where people can live, shop, work, and play without needing to drive is a very or somewhat convincing reason to support greater density. Similarly, 56 percent are more likely to support increased density after hearing that it will add housing options that better match today's needs for seniors, single adults, and small families. A majority are also persuaded by arguments centered on the idea that more dense neighborhoods have more affordable housing options.

Executive Summary

- Messages in support of more dense development resonate most with voters under age 50, registered Democrats, non-homeowners, people of color, and those who have lived in Wake County for less than twenty years.

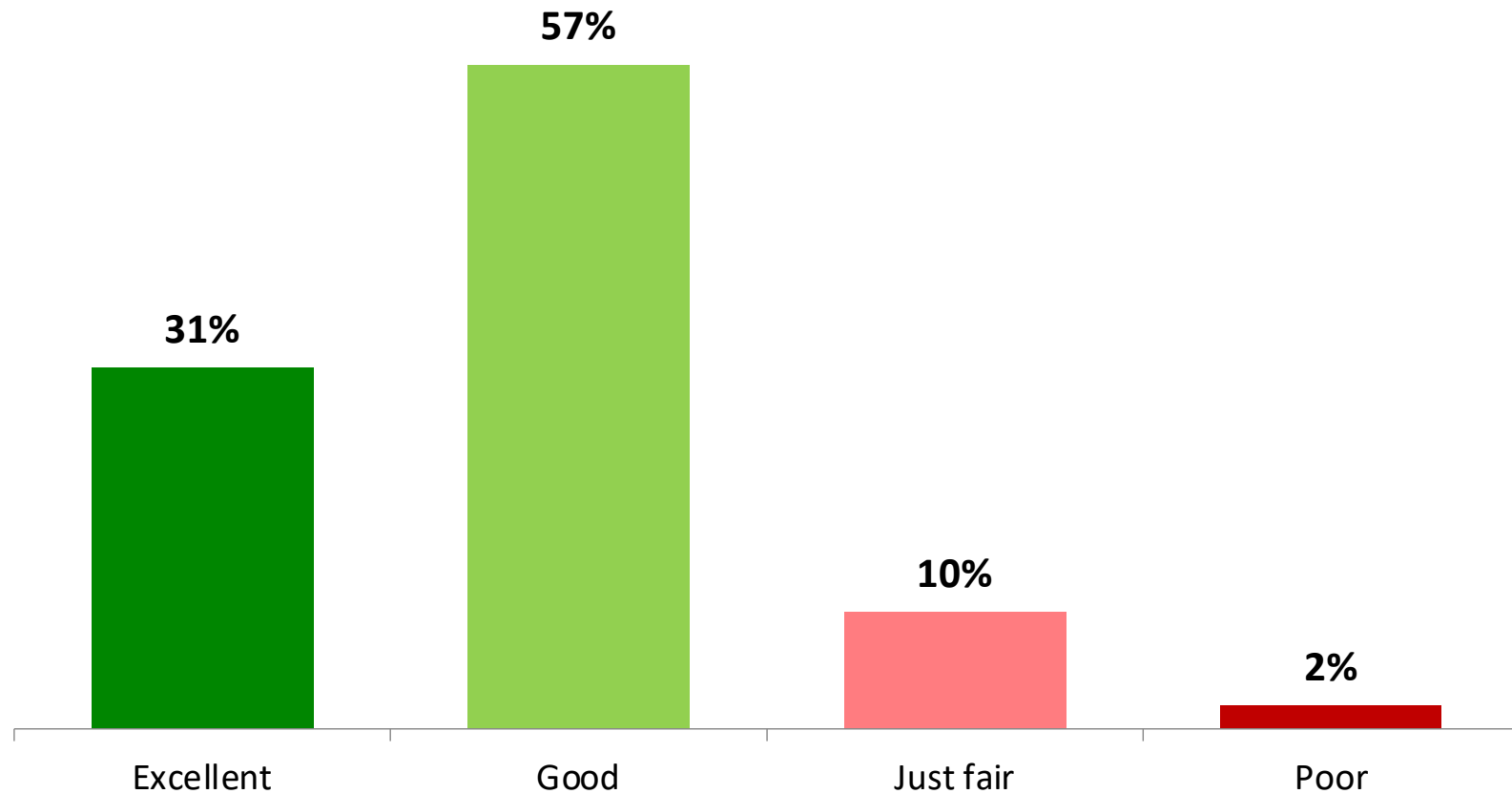
- **Support for more dense development improves only modestly after messaging.** After messaging, support for allowing more dense development rose just 4-points to 40 percent. A majority (55 percent) were opposed.
 - After messaging, majorities of voters age 18 to 34 (57 percent favor), men under age 50 (55 percent), younger non-college (56 percent) and single voters (54 percent) support zoning reform that would allow for more dense development.
 - Opposition to zoning reforms remains high among voters aged 50 and above (68 percent), registered Republicans (64 percent) and those who have lived in Wake County for more than 20 years (63 percent opposed).

Wake County Mood

Most Describe Their Quality of Life as Excellent or Good

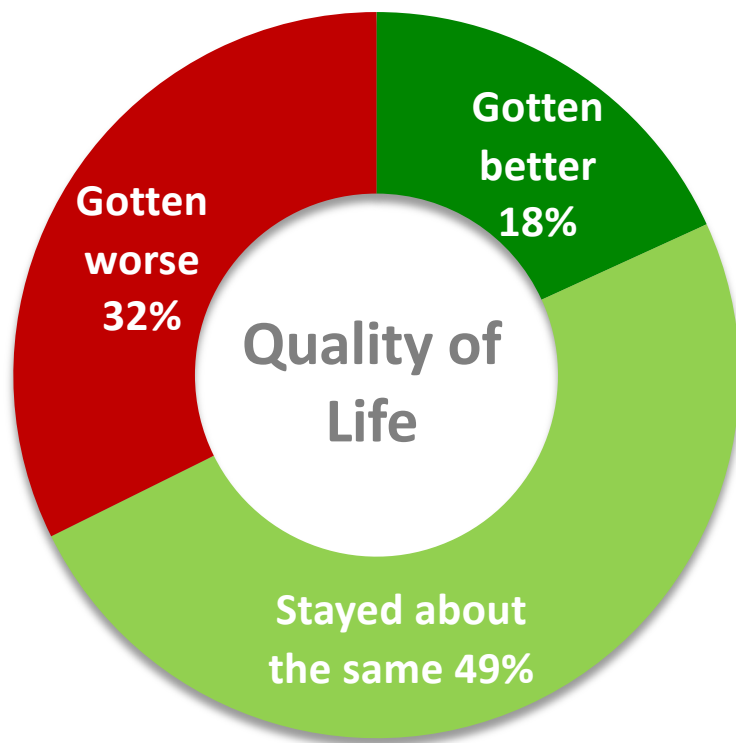
Quality of Life

Excellent/Good: 88% | Just fair/Poor: 12%

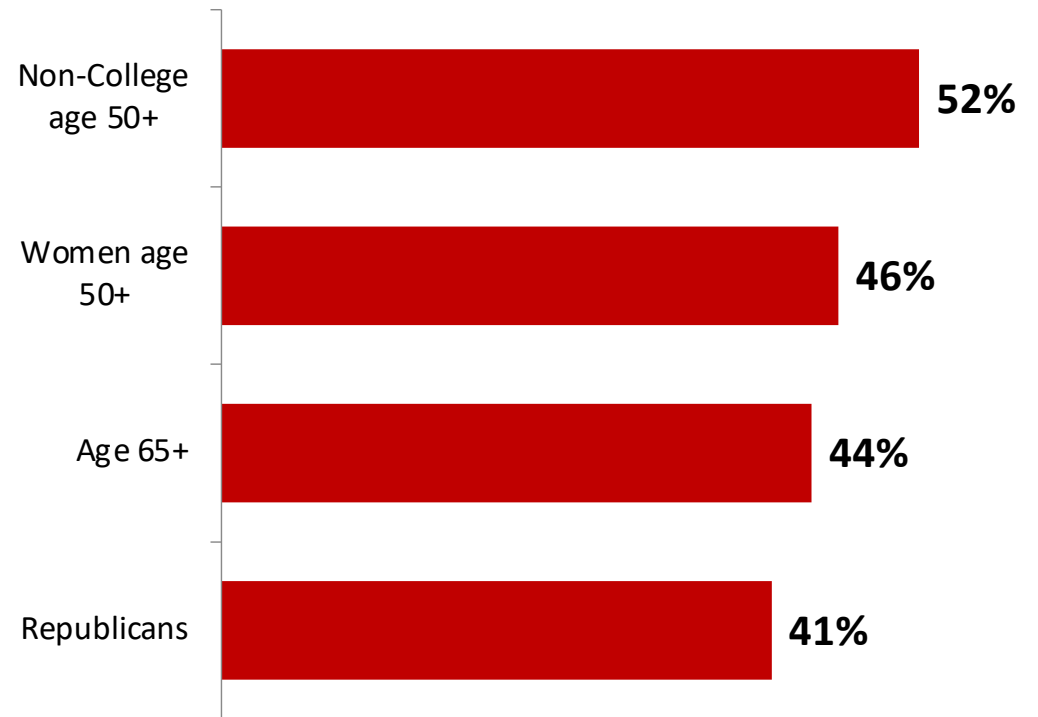


Plurality Feel Quality of Life Has Stayed the Same in Recent Years, But One-Third Say it Has Gotten Worse

Quality of Life over Previous Three Years



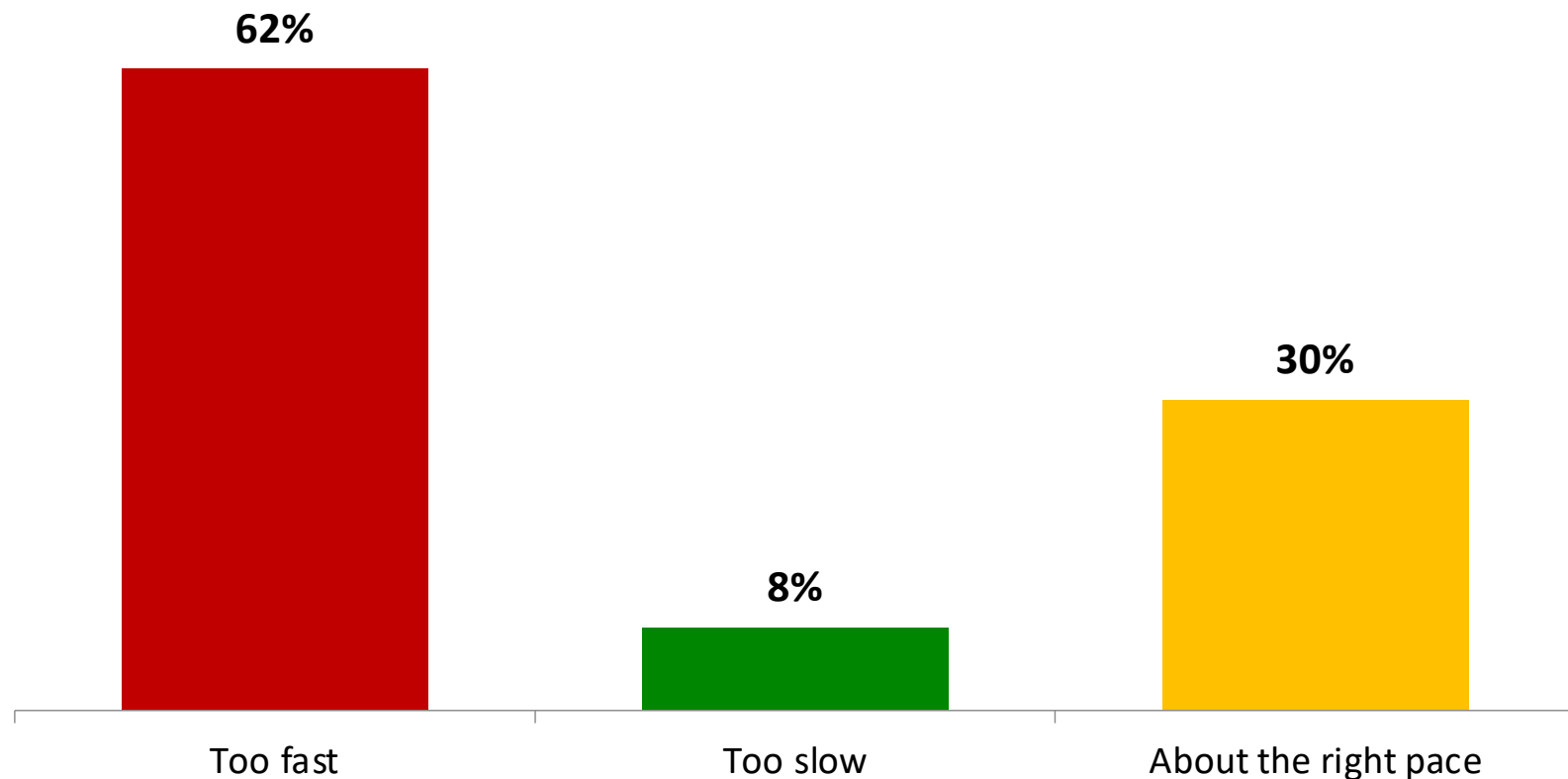
Top Groups who say Quality of Life has "Gotten Worse"



Q.5 In the past few years, do you think the quality of life in Wake County has gotten better, gotten worse, or stayed about the same?

Almost Two-Thirds Feel that Residential Growth and Development is Happening Too Fast

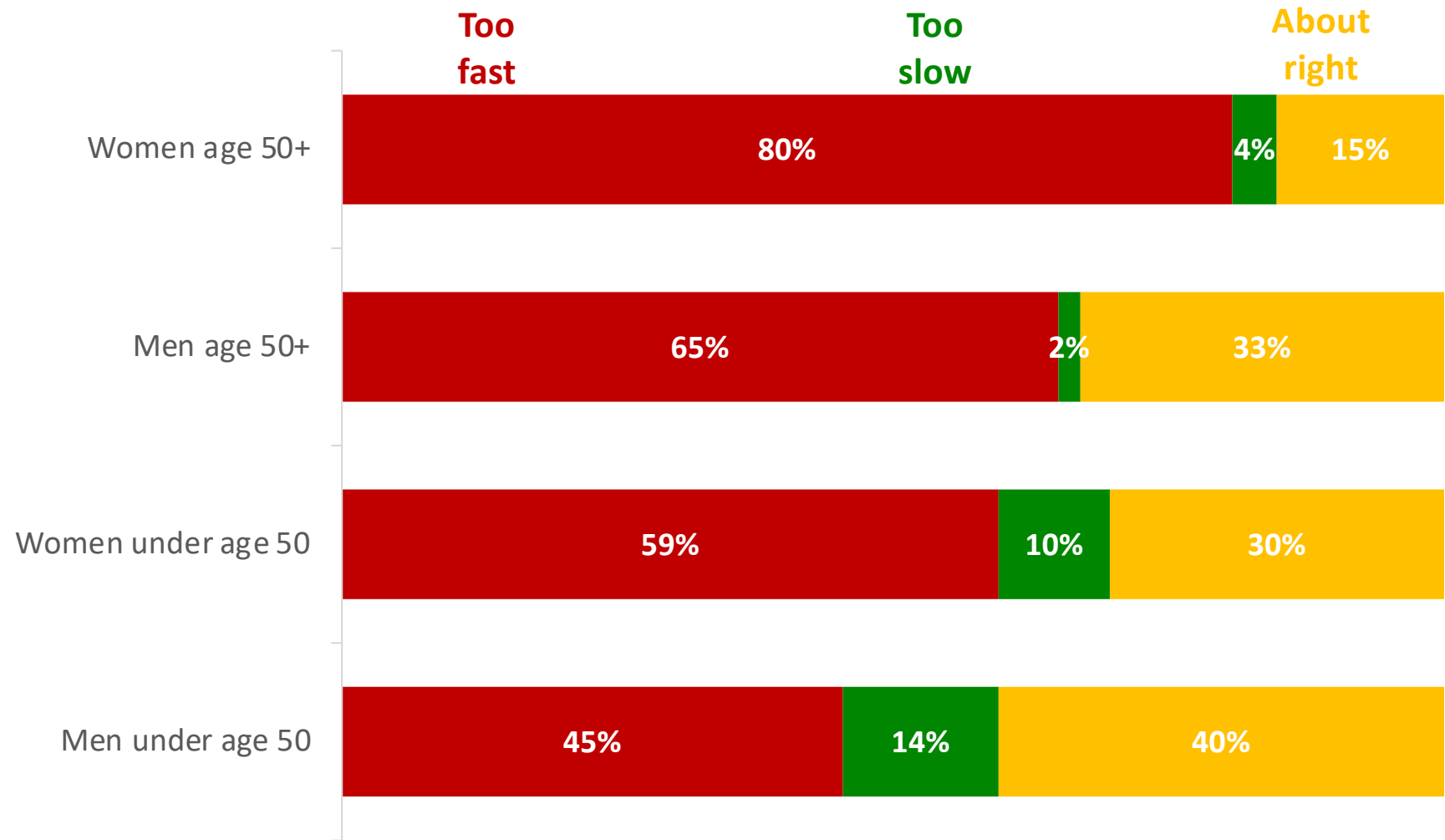
Pace of Residential Growth



Q.6 When it comes to the issue of growth and development in Wake County. Would you say that the pace of RESIDENTIAL growth and development in Wake County is happening:

Older Women Overwhelmingly Believe that Residential Growth is Happening Too Fast

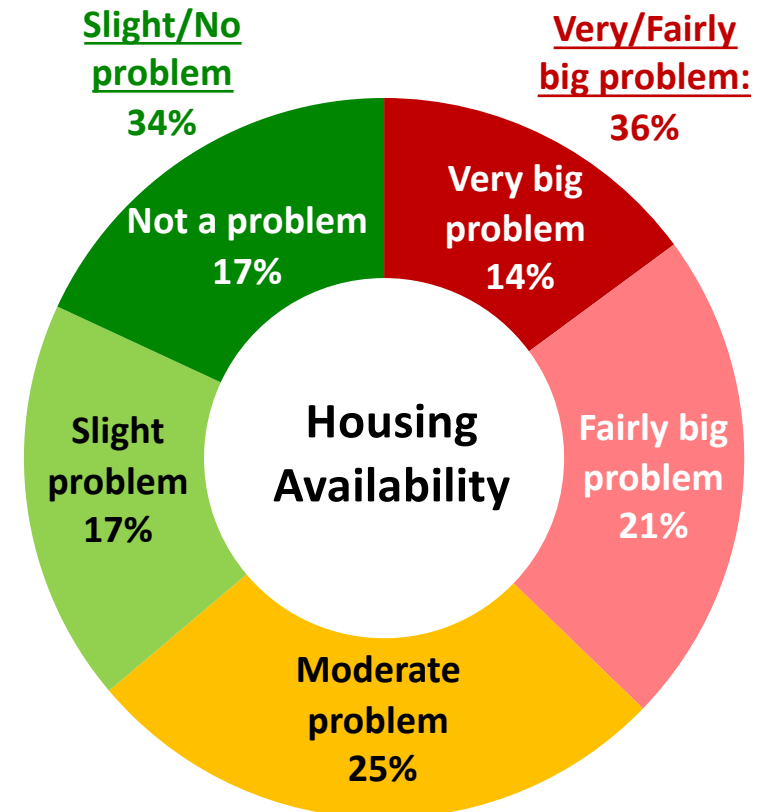
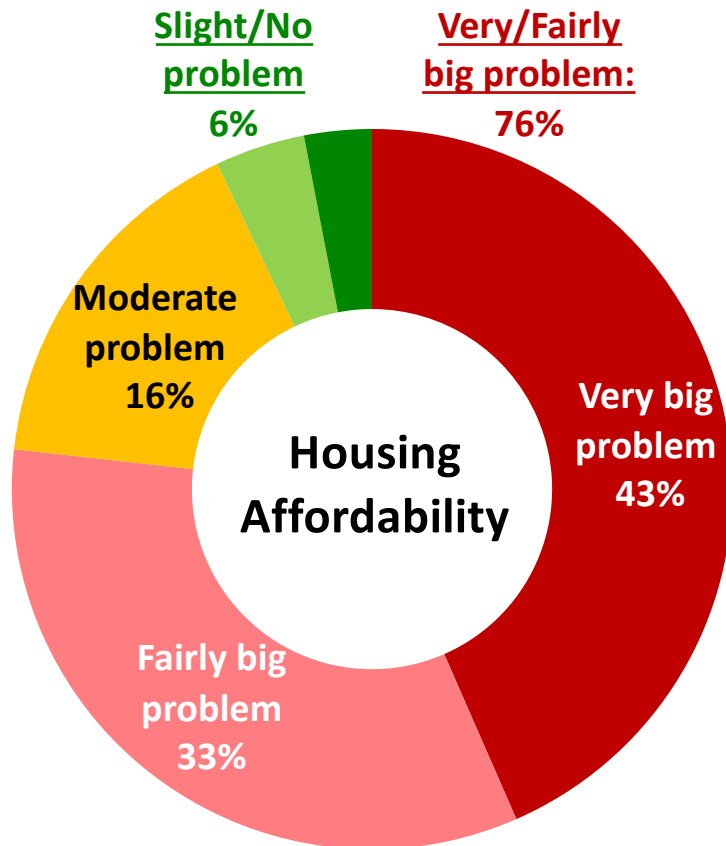
Pace of Residential Growth by Gender/Age



Q.6 When it comes to the issue of growth and development in Wake County. Would you say that the pace of RESIDENTIAL growth and development in Wake County is happening:

Broad Consensus that Housing Affordability is a Big Problem, But Much Less Concern About Housing Supply

Housing Affordability and Availability

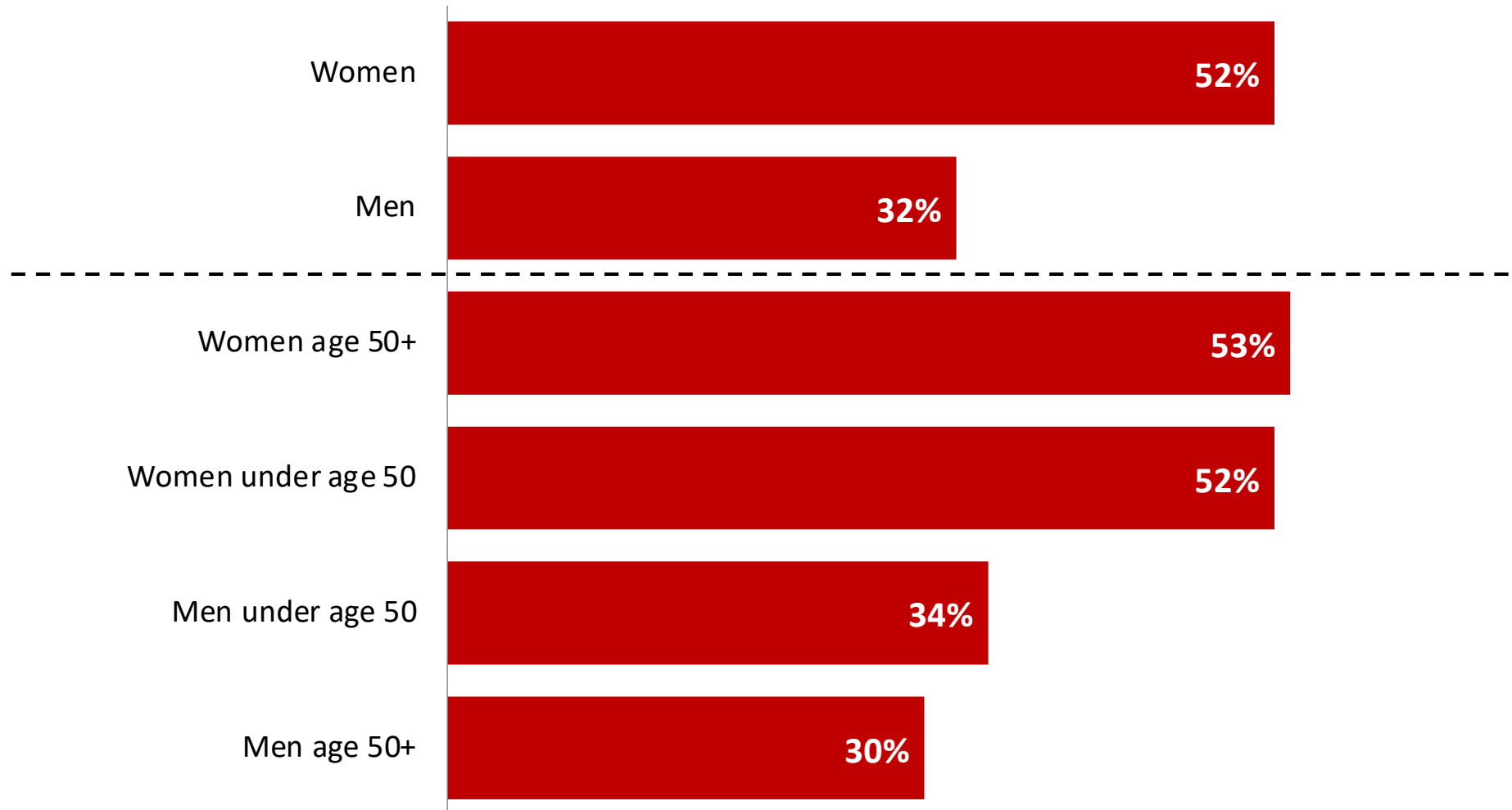


Q.7 How much of a problem is housing affordability in Wake County, that is to say, how much it costs to buy or rent a home?

Q.8 How much of a problem is the availability of housing in Wake County, that is to say, the number of houses, condominiums, or apartments that are available to buy or rent?

Most Women, Both Young and Old, View Housing Affordability as a Very Big Problem

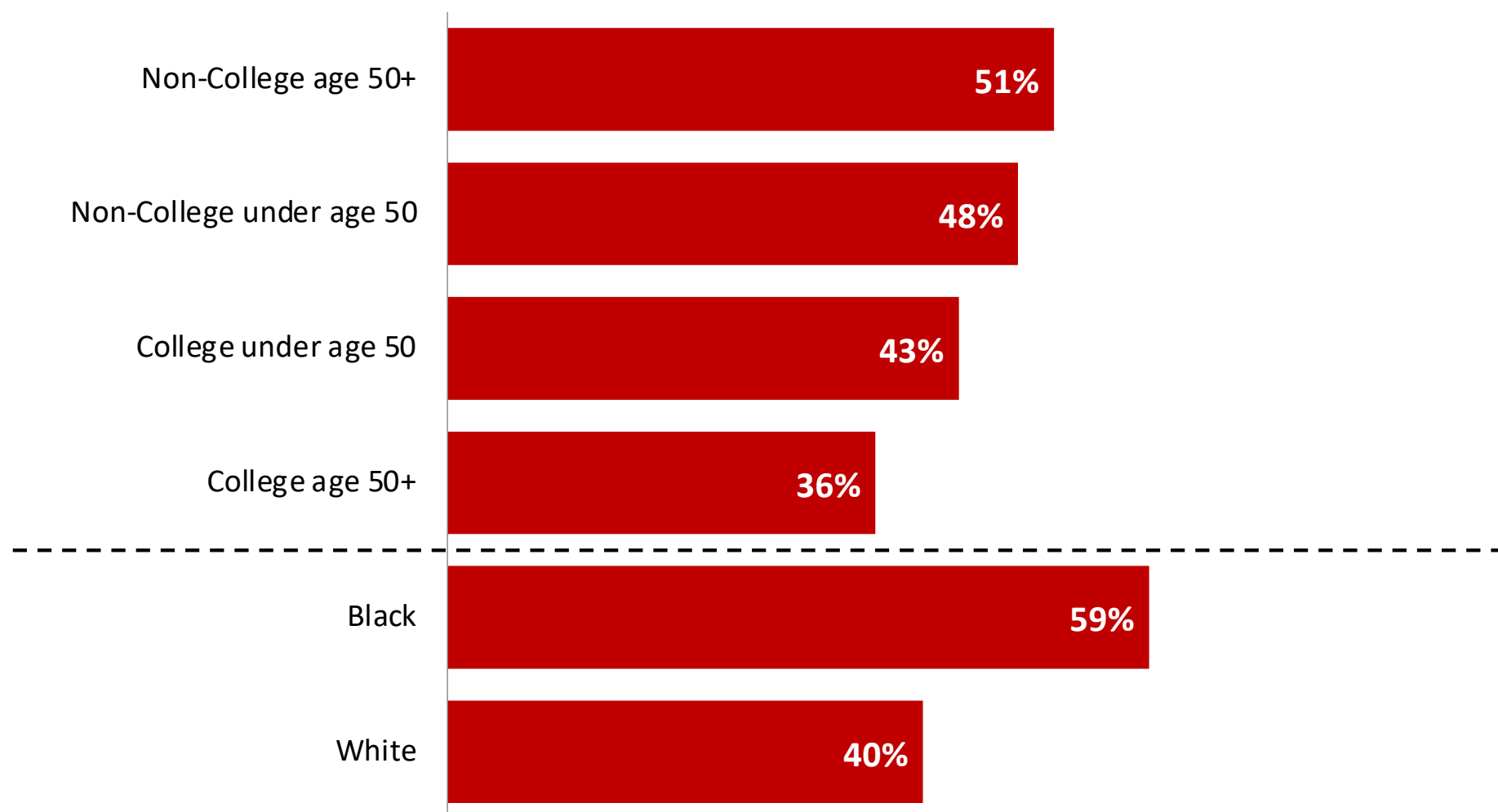
Housing Affordability is a “Very Big Problem” by Gender and Gender/Age



Q.7 How much of a problem is housing affordability in Wake County, that is to say, how much it costs to buy or rent a home?

A Majority of Older Voters Without a College Degree and Black Voters View Housing Affordability as a Very Big Problem

Housing Affordability is a “Very Big Problem” by Age/Education and Race



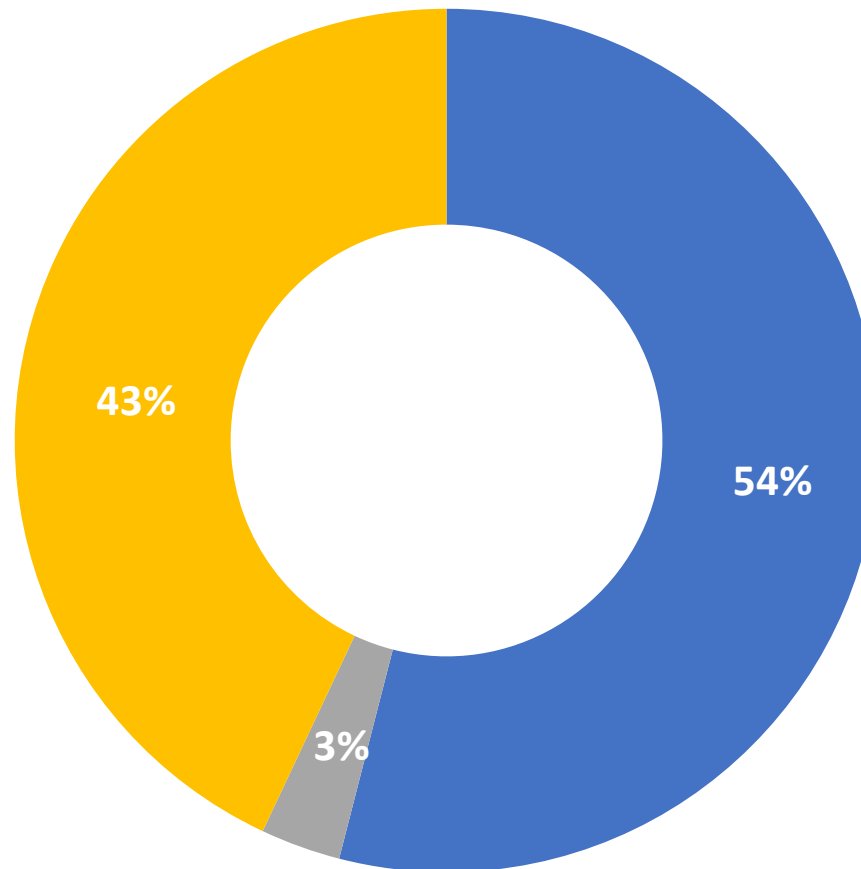
Q.7 How much of a problem is housing affordability in Wake County, that is to say, how much it costs to buy or rent a home?

Cost of Housing Trumps Growth Concerns as the More Pressing Issue in the County

Overall Growth vs. Cost of Housing as the More Pressing Issue

Overall Growth

Overall growth in Wake County, which has increased the cost of living and increased traffic, making it difficult to get around.

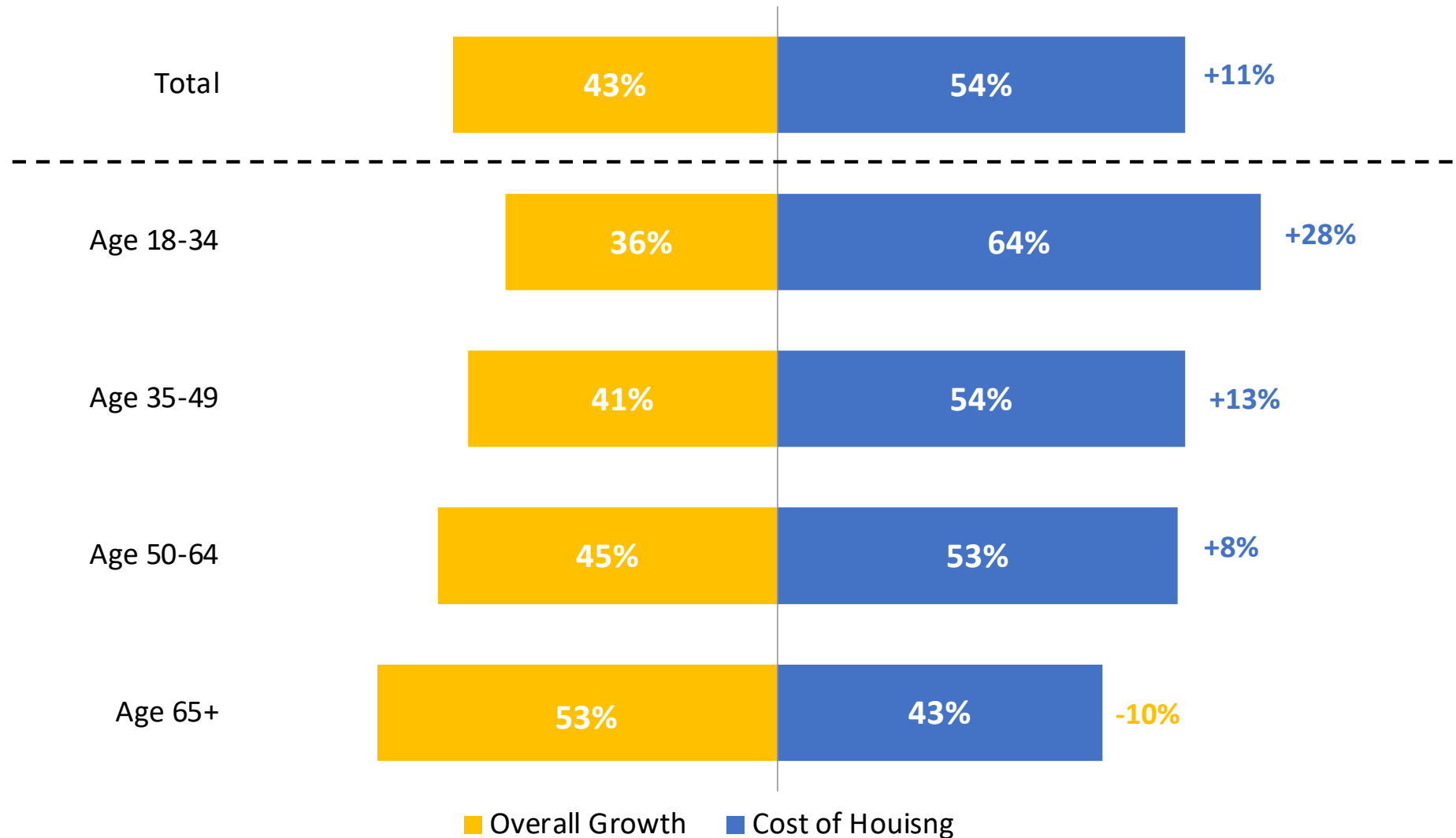


Cost of Housing

The cost of housing in Wake County, which has become so expensive that it is difficult for families and seniors to live here.

Affordability Concern Higher With Younger Voters; Seniors More Focused On Growth Concerns

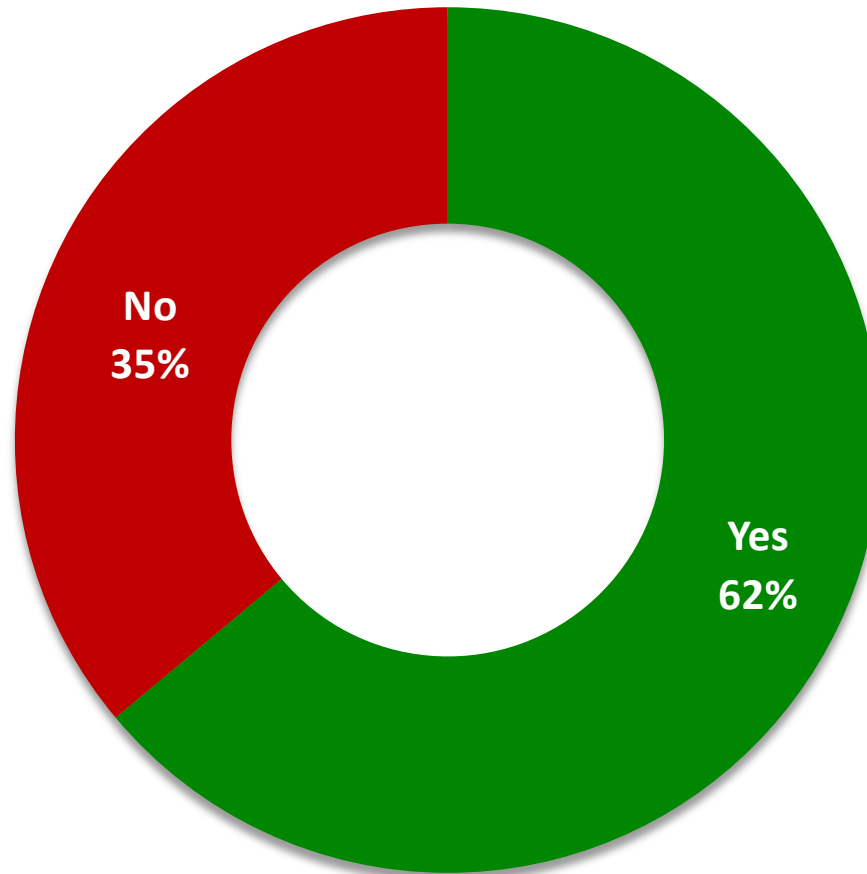
Overall Growth vs. Cost of Housing as the More Pressing Issue



Housing and Dense Development

Nearly Two-Thirds Say that Wake County has Enough Housing Options;

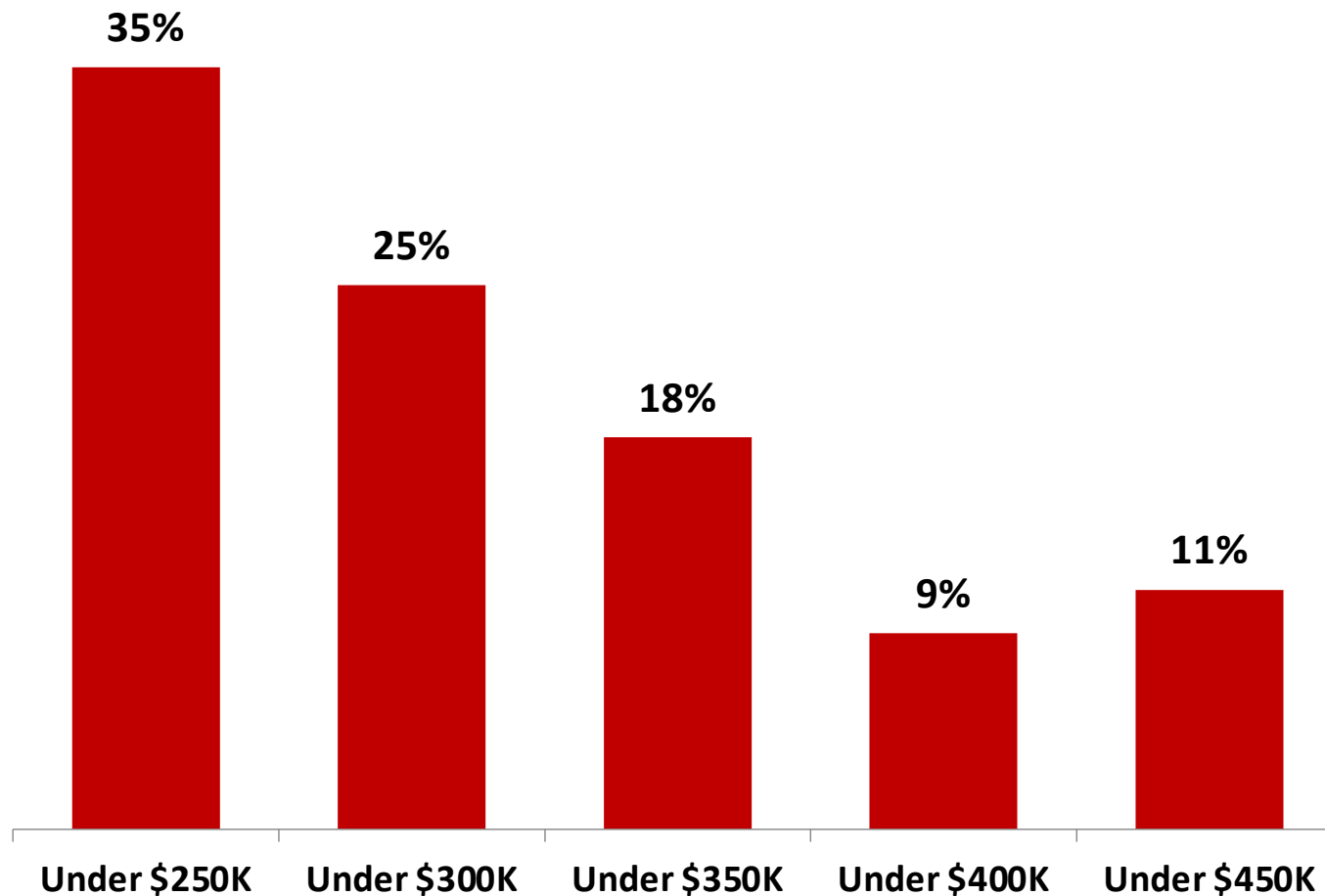
Are There Enough Different Housing Options?



Q.10 When it comes to housing options in Wake County, things like apartment buildings, town homes, duplexes, fourplexes, and single-family homes, would you say there are enough different housing options available for people who want to live in Wake County? Yes or no.

Sixty Percent View Affordable Housing as Priced Under \$300K

What Price Would You Consider to be Affordable Housing?



Q.11 When you think about adding more housing that is affordable in your community, which of the following prices are you thinking about for homes or condominiums that could be purchased...

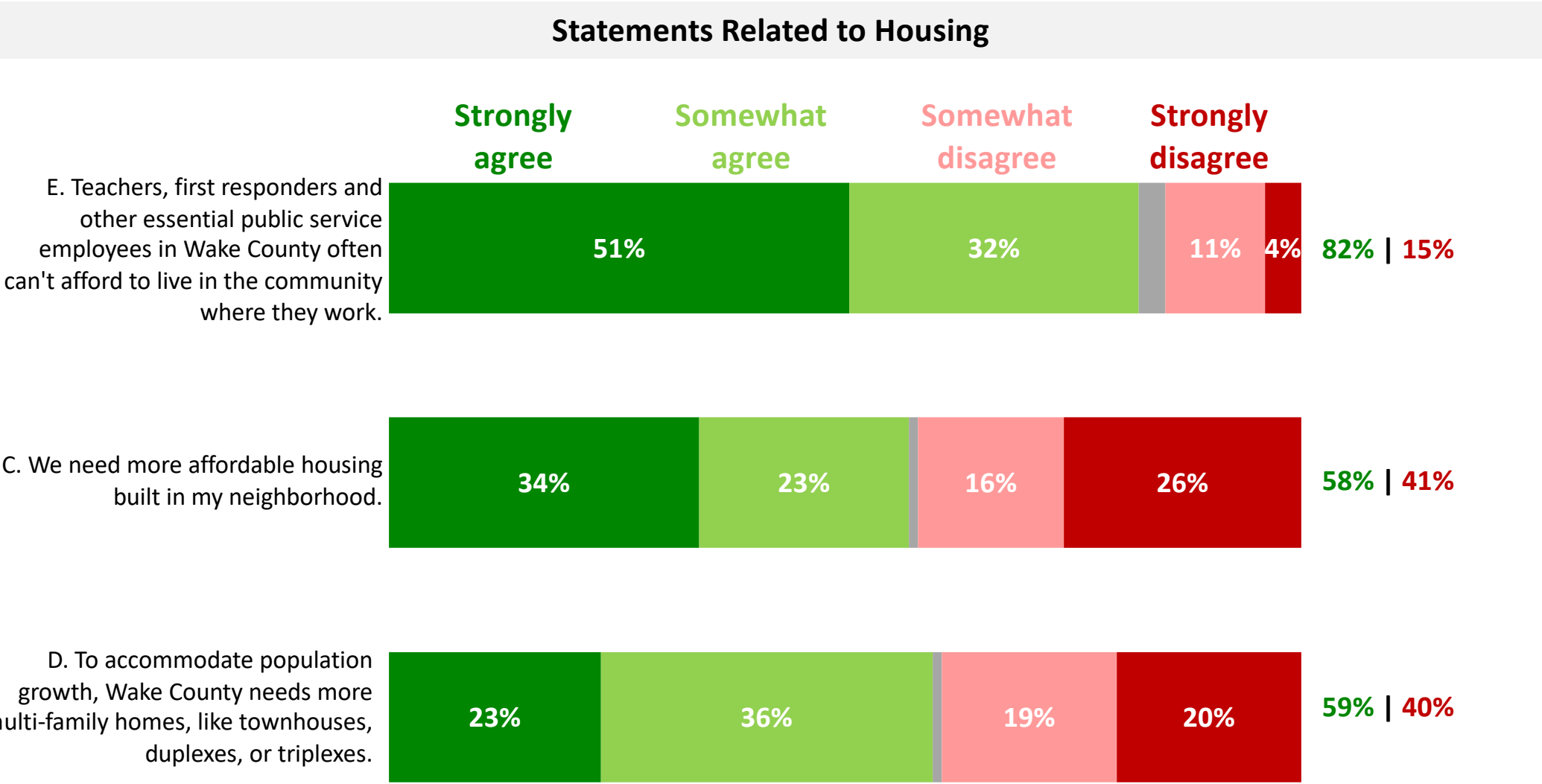
Definition of “Affordable” Housing Differs By Gender, Income And Race

What Price Would You Consider to be Affordable Housing? By Gender, Income and Race

Prices considered to be Affordable Housing		Gender		Income		Race	
Q11	Total	Men	Women	Under \$100K	Over \$100K	White	Black
Under \$250,000	35	28	41	47	24	30	55
Under \$300,000	25	23	27	26	24	27	20
Under \$350,000	18	21	14	13	22	21	12
Under \$400,000	9	10	9	5	12	11	5
Under \$450,000	11	14	8	7	14	9	8

Q.11 When you think about adding more housing that is affordable in your community, which of the following prices are you thinking about for homes or condominiums that could be purchased...

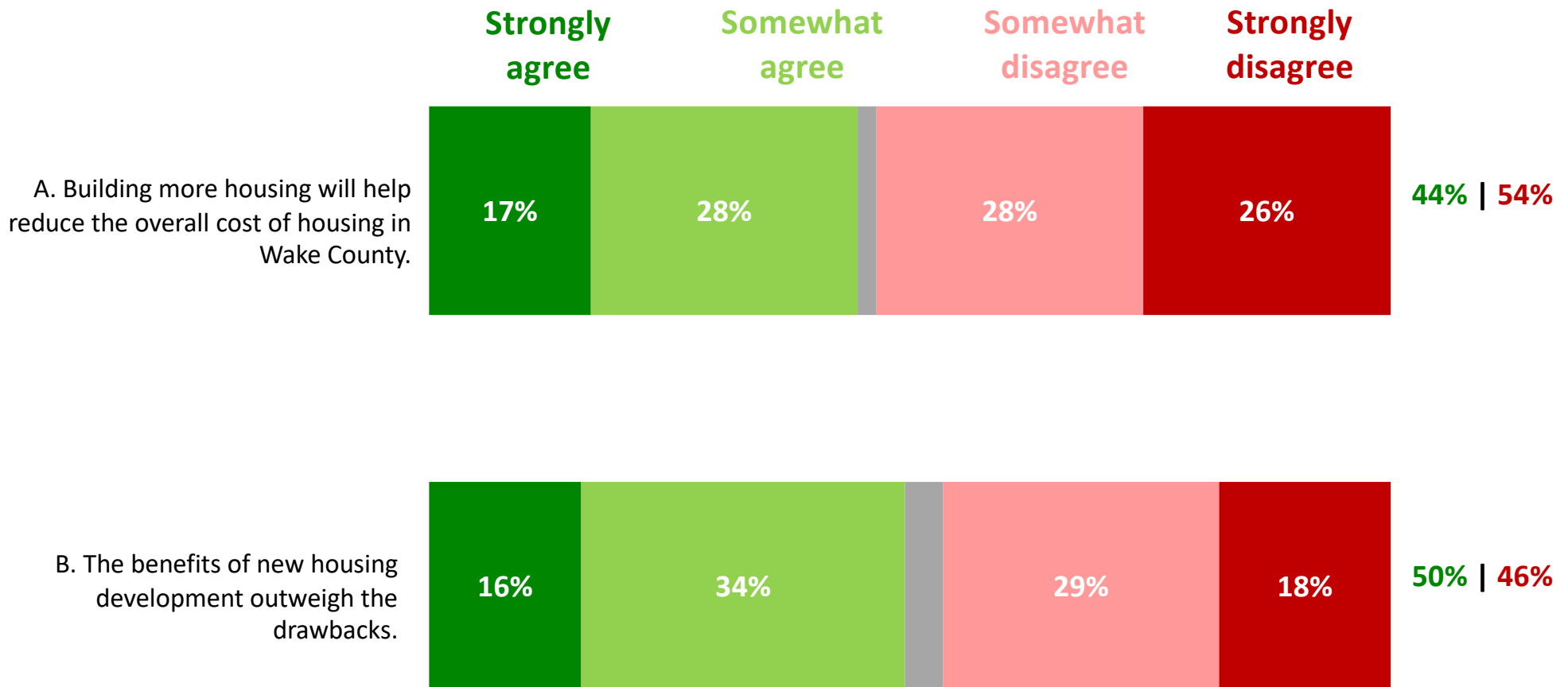
Broad Agreement That More Affordable Housing and Options Are Needed, Especially for Public Service Employees



Q.12 Now I am going to read you a series of statements related to housing in Wake County. Please tell me whether you agree or disagree with each.

Voters Split on Benefits of New Housing and Doubt That More Housing Will Bring Down Costs

Statements Related to Housing



Q.12 Now I am going to read you a series of statements related to housing in Wake County. Please tell me whether you agree or disagree with each.

Voters Under Age 50 (Especially Those Aged 18-34) And Center Region Most Amenable to More Multi-Family Homes

...Wake County needs more multi-family homes by Region and Age

% Agree and Disagree		Region			Age			
Q12D	Total	North (1,6)	Central (4,5,7)	South (2,3)	18 - 34	35 - 49	50 - 64	Over 64
Strongly agree	23	24	29	15	36	23	17	15
Somewhat agree	36	33	36	39	41	35	31	38
Somewhat disagree	19	22	17	19	12	18	23	25
Strongly disagree	20	19	17	27	11	21	29	20
Total Agree	59	57	65	54	78	58	48	52
Total Disagree	40	40	34	46	22	40	52	46

Q.12D Now I am going to read you a series of statements related to housing in Wake County. Please tell me whether you agree or disagree with each: *To accommodate population growth, Wake County needs more multi-family homes, like townhouses, duplexes, or triplexes.*

Young College Voters and Young Men Agree that the Benefits of New Housing Development Outweigh the Drawbacks

Non-college and women voters over age 50 most likely to disagree

The Benefits of New Housing Development Outweigh the Drawbacks by Education/Age and Gender/Age

% Agree and Disagree		Education/Age				Gender/Age			
Q12B	Total	Younger Non Coll	Older Non Coll	Younger Coll	Older Coll	Younger Men	Older Men	Younger Women	Older Women
Strongly agree	16	12	11	21	12	22	13	15	12
Somewhat agree	34	36	24	38	36	42	34	34	30
Somewhat disagree	29	35	28	25	30	22	24	34	34
Strongly disagree	18	12	35	13	19	12	25	13	22
Total Agree	50	48	35	59	48	64	47	49	42
Total Disagree	46	47	62	38	49	34	49	46	55

Q.12B Now I am going to read you a series of statements related to housing in Wake County. Please tell me whether you agree or disagree with each: *The benefits of new housing development outweigh the drawbacks.*

Young Men Believe that Building More Housing Will Reduce Overall Costs While Older Non-College and Women Broadly Disagree

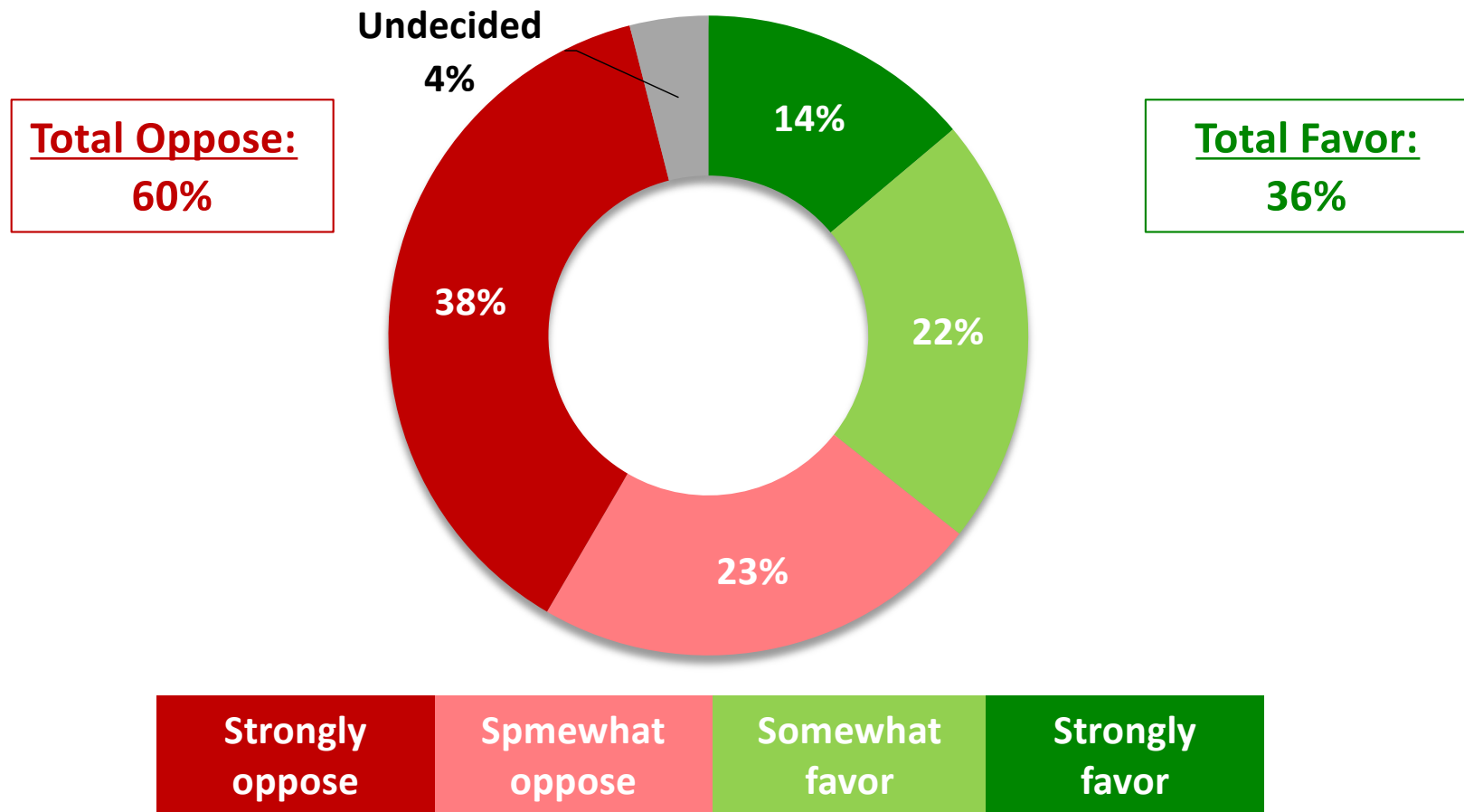
Building More Housing to Reduce Housing Costs by Education/Age and Gender/Age

% Agree and Disagree		Education/Age				Gender/Age			
Q12A	Total	Younger Non Coll	Older Non Coll	Younger Coll	Older Coll	Younger Men	Older Men	Younger Women	Older Women
Strongly agree	17	17	6	24	13	31	15	15	6
Somewhat agree	28	26	20	23	37	22	31	26	33
Somewhat disagree	28	28	32	30	25	23	28	32	25
Strongly disagree	26	29	39	21	23	19	24	27	33
Total Agree	44	43	26	47	50	53	46	41	39
Total Disagree	54	57	71	51	48	42	52	59	58

Q.12A Now I am going to read you a series of statements related to housing in Wake County. Please tell me whether you agree or disagree with each: *Building more housing will help reduce the overall cost of housing in Wake County.*

Most are Opposed to Changing Zoning Laws to Allow for More Dense Development

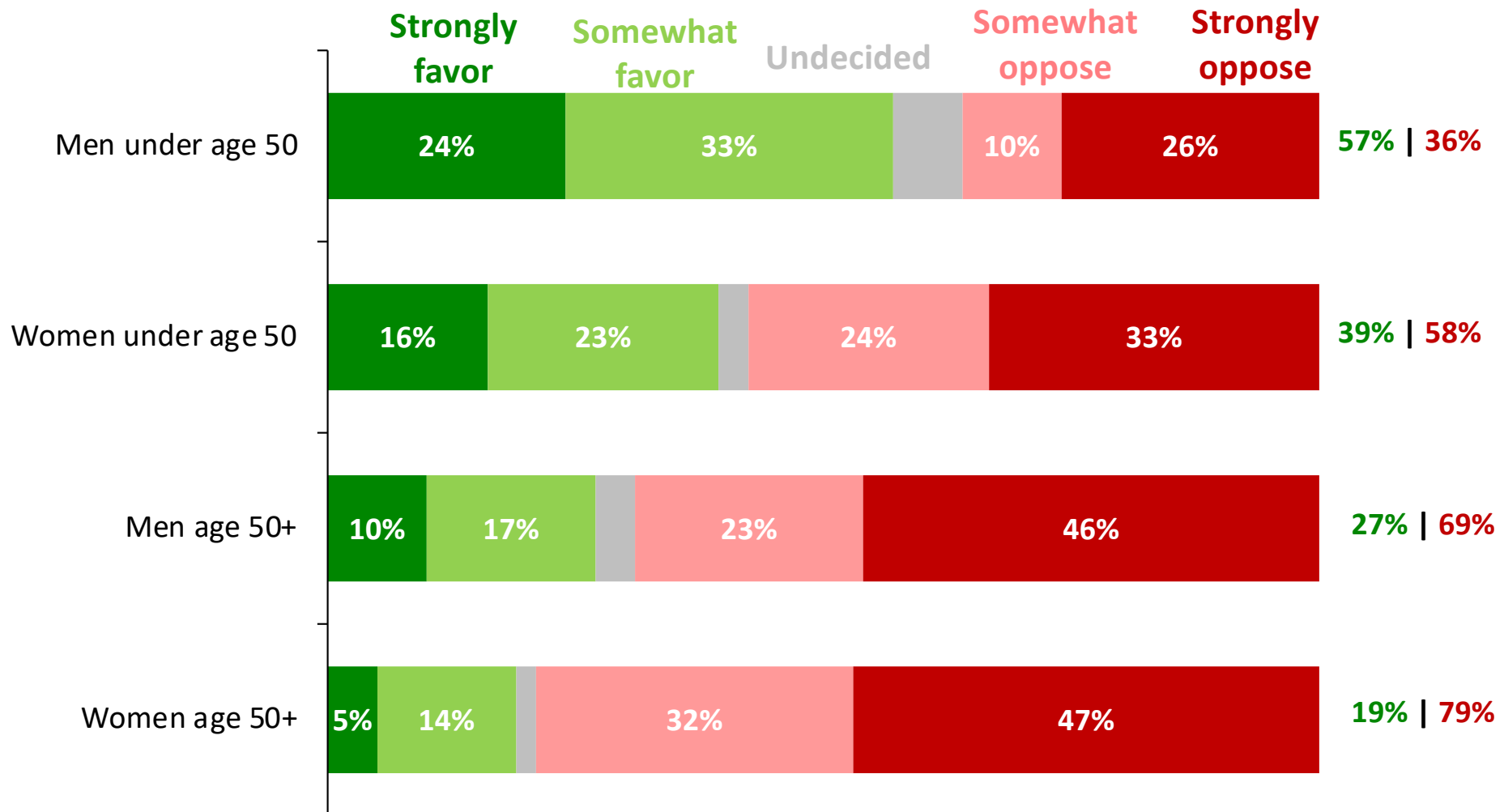
Views on Changing Zoning Laws to Allow for More Dense Development Initial Vote



Q.18 As you may know, housing density refers to the number of homes or apartments that are allowed in a neighborhood, city or county area. Communities can increase density in different ways, including allowing for more homes to be built on smaller lots, building more townhomes, duplexes or triplexes and by allowing more apartment buildings and condominiums. How about you? Do you favor or oppose changing zoning laws in your community to allow for more dense development?

Young Men are the Only Group in Favor of Changing Zoning Laws to Allow for More Dense Development

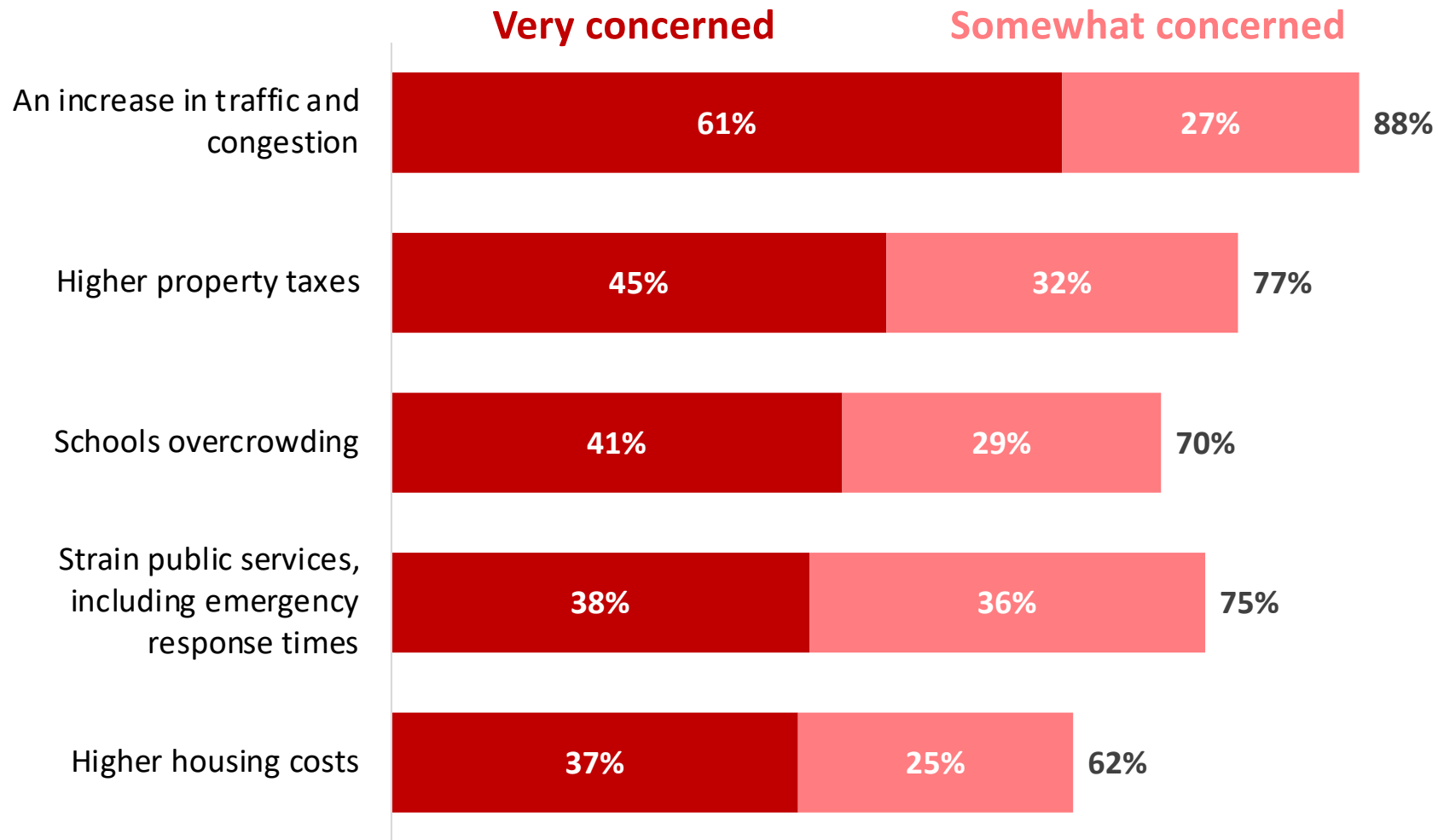
Views on Changing Zoning Laws to Allow for More Dense Development by Gender/Age



Q.18 As you may know, housing density refers to the number of homes or apartments that are allowed in a neighborhood, city or county area. Communities can increase density in different ways, including allowing for more homes to be built on smaller lots, building more townhomes, duplexes or triplexes and by allowing more apartment buildings and condominiums. How about you? Do you favor or oppose changing zoning laws in your community to allow for more dense development?

More Congestion and Traffic are Voters' Biggest Concern about Increased Housing Density Among a List of Highly Salient Concerns

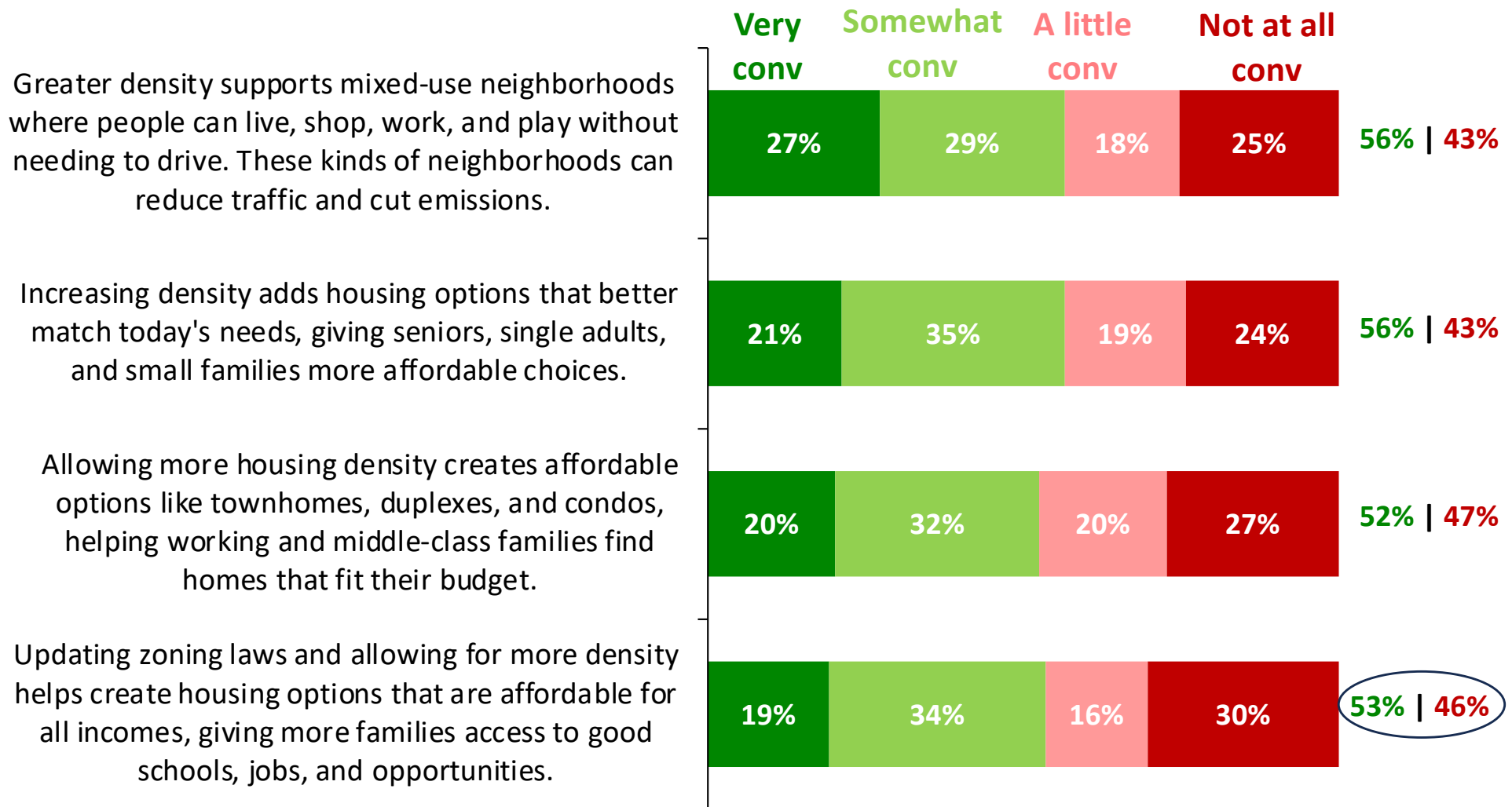
Concerns about More Housing Being Built



Q.19 Now I am going to read you some things that some people say concerns them about more homes being built in their community. As you think about proposals to increase housing in Wake County, please tell me how concerned you are about each of the following.

Mixed-Use Neighborhoods and More Housing Options for Targeted Demographics Best Testing Messages; Affordability Also Has Appeal

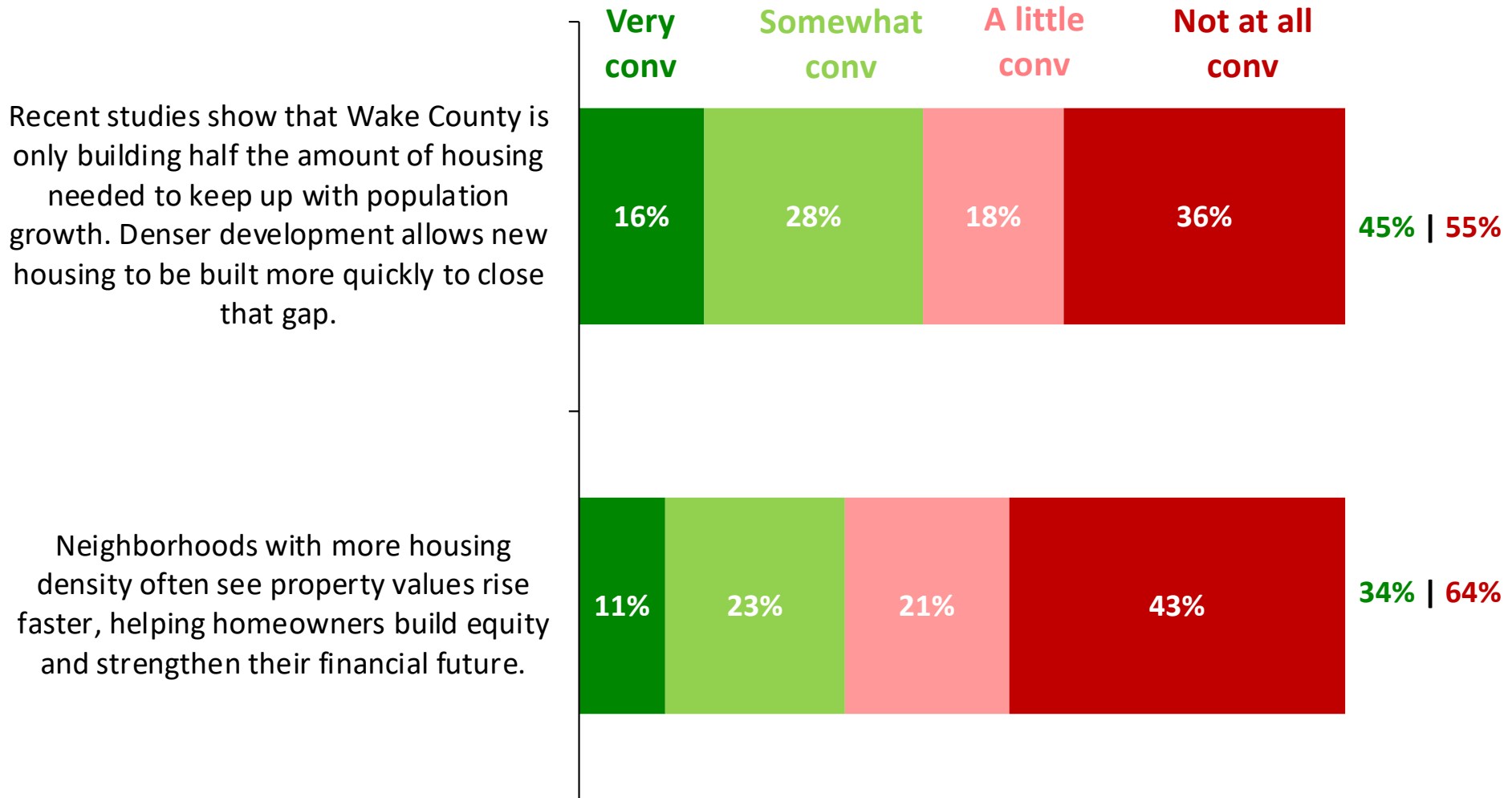
Convincing Reasons to Increase Housing Density 1st Tier



Q.25 Next I am going to read you some reasons for increasing housing density and development. For each, please tell me whether it is a very convincing, somewhat convincing, a little convincing, or not at all convincing reason to change zoning laws in your community to allow for more dense housing development.

Voters Reject Need for More Housing Argument and Assertion that Density Increases Property Values

Convincing Reasons to Increase Housing Density 2nd Tier



Q.25 Next I am going to read you some reasons for increasing housing density and development. For each, please tell me whether it is a very convincing, somewhat convincing, a little convincing, or not at all convincing reason to change zoning laws in your community to allow for more dense housing development.

Messages Work Best with Voters Under Age 50 and Non-Republicans

Reasons for Increasing Housing Density by Gender/Age and Party Registration

% Very or Somewhat Convincing		Gender/Age				Party Registration		
Q25	Total	Younger Men	Older Men	Younger Women	Older Women	Dem	Unaff/Other	Rep
B. Greater density supports mixed-use neighborhoods...	56	69	42	65	47	64	57	41
E. Increasing density adds housing options...	56	65	44	68	45	68	55	39
A. Updating zoning laws and allowing for more density...	53	69	39	61	40	59	58	31
C. Allowing more housing density creates affordable options...	52	64	41	60	42	59	55	36

Q.25 Next I am going to read you some reasons for increasing housing density and development. For each, please tell me whether it is a very convincing, somewhat convincing, a little convincing, or not at all convincing reason to change zoning laws in your community to allow for more dense housing development.

Newer Arrivals, Non-Homeowners and People of Color Find Messages More Persuasive Than Their Counterparts

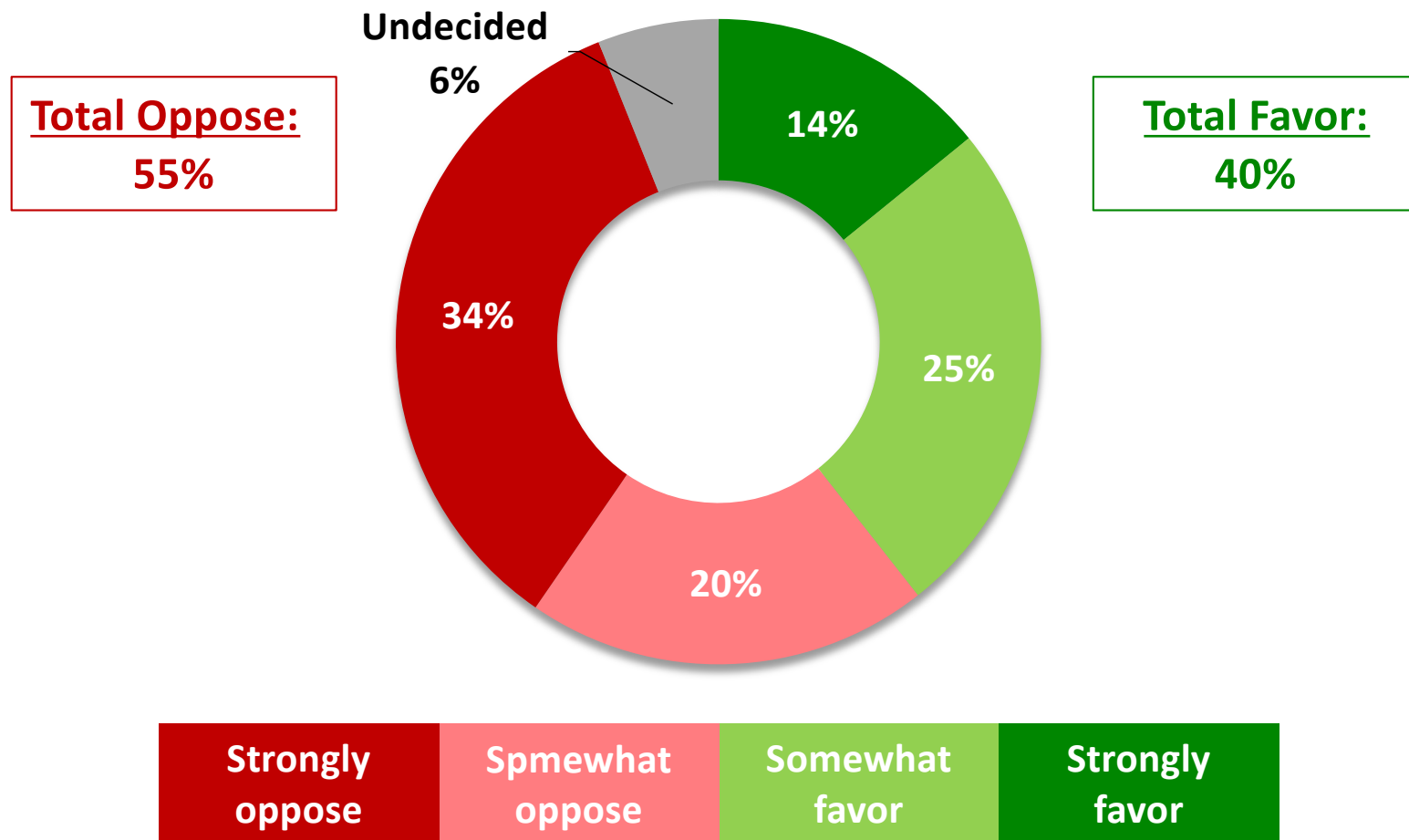
Reasons for Increasing Housing Density by Tenure, Homeownership Status, and Race

% Very or Somewhat Convincing		Tenure			Homeownership		Race	
Q25	Total	Less than 10 yrs	11 - 20 yrs	>20 yrs	Own	Total Non - owner	White	POC
B. Greater density supports mixed-use neighborhoods...	56	68	61	46	50	69	52	62
E. Increasing density adds housing options...	56	58	59	54	52	66	53	62
A. Updating zoning laws and allowing for more density...	53	57	59	47	46	66	49	58
C. Allowing more housing density creates affordable options...	52	59	59	45	47	64	50	56

Q.25 Next I am going to read you some reasons for increasing housing density and development. For each, please tell me whether it is a very convincing, somewhat convincing, a little convincing, or not at all convincing reason to change zoning laws in your community to allow for more dense housing development.

Majority are Still Opposed to Changing Zoning Laws Even After Heavy Messaging In Favor Of Changes

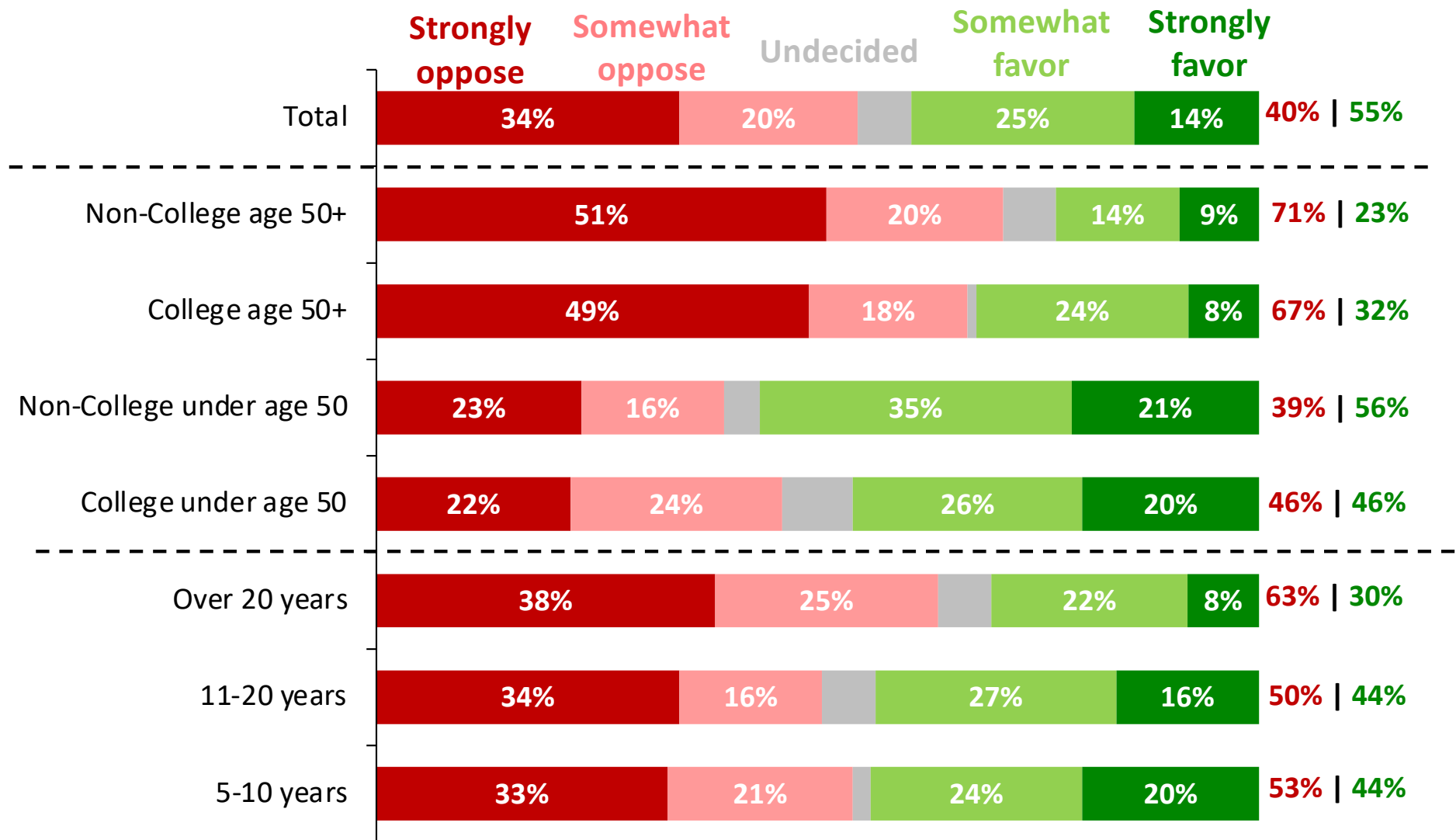
Views on Changing Zoning Laws to Allow for More Dense Development Informed Vote



Q.32 Now, after hearing more information, let me ask you again, do you favor or oppose changing zoning laws in your community to allow for more dense development?

Older And Longer-Term Residents Remain Firmly Opposed To Changing Zoning Allows To Allow For More Density

Views on Changing Zoning Laws to Allow for More Dense Development by Age/Education and Tenure



Q.32 Now, after hearing more information, let me ask you again, do you favor or oppose changing zoning laws in your community to allow for more dense development?

National Association of REALTORS®

NC – Wake County Housing

March 2026

Statara designed and administered this multi-modal survey conducted by professional interviewers and via an online platform. The survey reached 500 adults (500 weighted), age 18 or older, who indicated they are registered to vote. The survey was conducted March 16-18, 2026.

Thirty-seven percent of respondents were reached on wireless phones and six percent on VOIP/landlines. Fifty-seven percent of respondents were reached online. Quotas were assigned to reflect the demographic distribution of registered voters in Wake County, and the data were weighted to ensure an accurate reflection of the population. The sample was drawn from a third-party vendor file. The overall margin of error is +/- 4.4%. The margin of error for subgroups is larger and varies. Percentage totals may not add up precisely due to rounding.