

NC Statewide Housing Table Survey

Executive Summary: April 2025 Survey

To: NC Housing Table
From: Differentiators Data
Re: NC Housing Statewide Polling and Analysis

Methodology

Differentiators Data conducted a general election survey for the NC Housing Table. The purpose of the survey was to assess public opinion on several housing, affordability and property rights proposals at the state and local levels. The data for the survey was gathered through multi-modal responses from 500 likely general election voters April 11-14, 2025, with a margin of error of +/- 4.5%.

Bottom Line

The survey establishes housing as a top issue for North Carolina voters of both parties, though there are some notable differences between political parties and demographics on the issue and proposed solutions.

Republicans, Democrats and Unaffiliated voters agree by strong margins that housing costs are a problem. Additionally, voters between the ages of 18-29 and 30-40 are more concerned about the affordability of renting or purchasing housing and consider it a “big problem.” As it relates to property rights, Republicans more strongly support property owners deciding what to build on their property than Unaffiliated or Democratic voters.

Broad Support to Make Housing More Affordable and Attainable

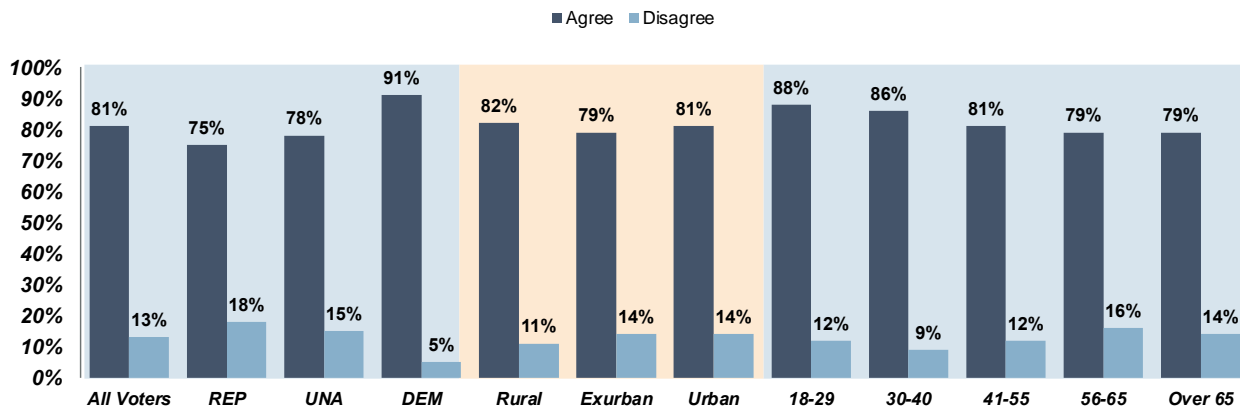
- A whopping 81% of voters said they agree that **“The average person cannot find a home, apartment or condominium they can afford to rent or purchase.”** Only 13% disagreed with this statement. 75% of voters who consider themselves Republicans agreed, 78% of Unaffiliateds and 91% of Democrats. 82% of rural voters agree, as did 79% of exurban and 81% of urban voters. Amongst all age groups, at least 79% agreed with 88% of those aged 18-29.
- 70% of voters rated **“one of the biggest problems (is)...the cost of renting or buying a home in North Carolina”** as a problem or a big problem, including 39% who rated it as a big problem. Only 25% said it is not a problem at all. 61% of Republicans, 68% of Unaffiliateds and 83% of Democrats said it was a problem or big problem as well as 82% of those aged 18-29 and 77% of those aged 30-40. Amongst urban voters, 72% said it was a problem or big problem.
- 69% of voters said the high cost of housing had a **negative impact on their ability to achieve other financial goals** like saving for retirement, buying a home, starting a family or affording educational expenses. 66% of voters who consider themselves Republicans

said it had a negative impact, 64% of Unaffiliateds and 76% of Democrats. Of those aged 18-29, 86% said it had a negative impact as did 89% of those aged 30-40.

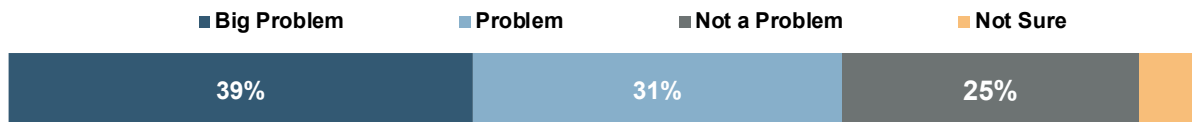
- 68% of voters agree, “**local counties, cities and towns make it too hard to find enough housing the average person can afford.**” Of those, 37% strongly agreed. 65% of voters who consider themselves Republicans agreed, 61% of Unaffiliateds and 80% of Democrats.
- A strong, bipartisan bloc of voters surveyed support policy proposals for **homeowners choosing design features (85%), converting old strip malls to housing (83%), ADUs (78%), farmland protections (76%), 90-day permitting limit (74%) and parking deregulations (63%).**

Housing Costs are a Major Voter Concern

“The average person cannot find a home, apartment or condominium they can afford to rent or purchase.”

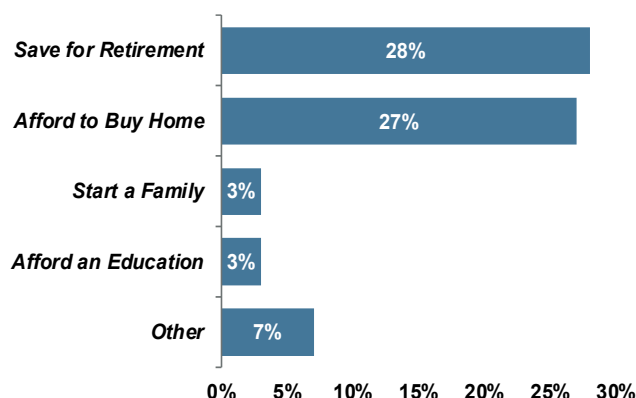
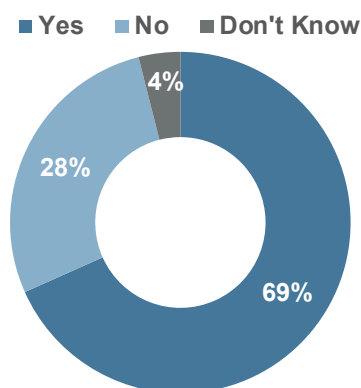


“On a rating scale of 1 to 10 with one meaning not a problem at all and ten meaning one of the biggest problems, what rating would you give the cost of renting or buying a home in North Carolina?”



	GOP	UNA	DEM	Rural	Exurban	Urban	18-29	30-40	41-55	56-65	Over 65
Big Problem	33%	33%	53%	32%	43%	43%	42%	48%	39%	41%	33%
Problem	28%	35%	30%	36%	26%	29%	40%	29%	35%	28%	29%
Not a Problem	34%	26%	13%	26%	25%	24%	16%	20%	23%	27%	30%

“Have high housing costs had a negative impact on any of the following?... Saving for Retirement, Afford to Buy Home, Start a Family, Afford an Education, Other”

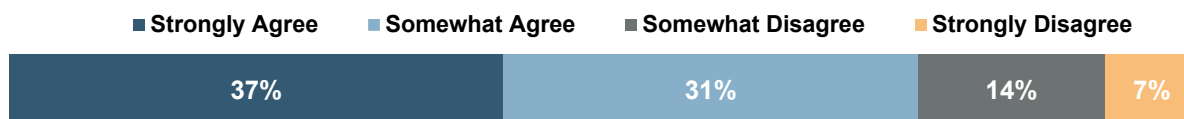


	GOP	UNA	DEM	Rural	Exurban	Urban	18-29	30-40	41-55	56-65	Over 65
Yes	66%	64%	76%	67%	66%	71%	86%	89%	70%	67%	55%
No	29%	19%	33%	30%	30%	24%	12%	11%	67%	28%	39%

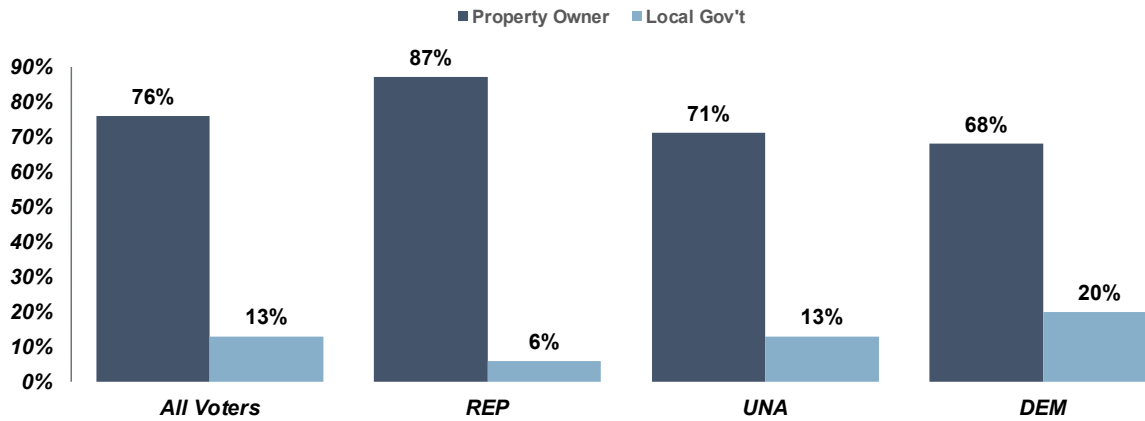
Voters are Concerned About Local Government's Impact on Housing

Voters are concerned that local governments make it too hard to obtain available and affordable housing and expressed support for property owners and the market – not government bureaucrats – being the main decision maker.

“The local counties, cities and towns make it too hard to find enough housing the average person can afford.”



76% of voters believe property owners should be the main decision maker about what to build on their property while only 13% believe local government should be the main decision maker.



Support for Housing Access and Affordability Proposals

The tables below show the difference in the housing access and affordability proposals by political party, location, age and race.

Proposal	Total	Rep	UNA	Dem	Rural	Exurban	Urban
Homeowners choose design features	85%	84%	83%	88%	91%	81%	81%
Convert Old Strip Malls to Housing	83%	82%	83%	83%	84%	76%	85%
ADUs	78%	75%	77%	80%	76%	75%	80%
Farmland protection	76%	74%	83%	73%	81%	75%	72%
90 day permitting limit	74%	81%	73%	68%	76%	75%	72%
Statewide building standard	71%	65%	77%	71%	75%	63%	71%
Vote on historic districts	65%	69%	56%	63%	67%	68%	62%
Parking deregulation	63%	68%	57%	63%	74%	59%	54%
Tiny homes	62%	57%	67%	63%	65%	54%	64%
Faith-based housing	58%	66%	50%	58%	63%	53%	56%
Lots per acre minimum	55%	55%	59%	51%	57%	51%	54%

Proposal	18-29	30-40	41-55	56-65	Over 65	White	Black	Hispanic	Asian	Other
Homeowners choose design features	92%	85%	91%	86%	78%	84%	87%	87%	89%	100%
Convert Old Strip Malls to Housing	88%	82%	79%	77%	88%	84%	80%	67%	89%	60%
ADUs	88%	77%	78%	79%	73%	78%	76%	87%	56%	100%
Farmland protection	78%	83%	76%	68%	79%	76%	80%	73%	67%	80%
90 day permitting limit	74%	72%	74%	78%	72%	74%	73%	80%	89%	60%
Statewide building standard	82%	71%	67%	72%	69%	70%	71%	80%	67%	80%
Vote on historic districts	50%	65%	68%	58%	72%	64%	66%	73%	78%	80%
Parking deregulation	48%	63%	68%	66%	62%	62%	69%	67%	67%	20%
Tiny homes	84%	71%	63%	66%	49%	62%	63%	60%	44%	60%
Faith-based housing	54%	52%	62%	53%	62%	57%	67%	47%	56%	60%
Lots per acre minimum	52%	55%	49%	53%	61%	55%	58%	53%	33%	40%

- 85% of voters support a “**proposal to protect a homeowner’s right to choose the exterior color, building materials, windows and other architectural features of their homes.**”
- 83% of voters support a “**proposal to allow apartment homes to be built near business and shopping districts in place of old offices and strip malls.**”
- 78% of voters support a “**proposal to allow homeowners to add small backyard cottages or garage apartments – often called accessory dwelling units or ADUs - to their existing lots.**”
- 76% of voters support a “**proposal to protect farmland and rural open spaces by allowing more homes to be built in suburban and urban areas.**”
- 74% of voters support a “**proposal to reduce delays in the creation of new housing by setting a standardized 90-day deadline for local governments to consider and issue permits for new homes.**”
- 63% of voters support a “**proposal that allows local property owners to decide how much parking to provide for new homes, rather than bureaucratic formulas set by the government.**”