



NC STATE Design

**HOUSING | CULTURE, POLICY, PRODUCTION**

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## **Housing Options for an Affordable Raleigh**

**Expanding Affordability and Choice Through Middle Housing**



# NC STATE Design

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Raleigh is a great city, but we can do better. People move here for strong jobs, good schools, and welcoming neighborhoods, and it is no surprise Raleigh has become one of the fastest-growing cities in the country. But as growth accelerates, the cost of finding a place to live has risen far faster than most people’s paychecks. Between 2019 and 2024, median home prices in Wake County jumped from roughly \$300,000 to more than \$460,000, while wages barely kept pace. Rents climbed just as quickly. For many residents, especially the people who keep this city running every day, the math no longer works.

Too many households now face a narrow, frustrating choice: a single-family home they cannot afford or a large apartment that may not fit their needs. The “middle” of the housing spectrum, the small, human-scale homes that once filled older Raleigh neighborhoods, has mostly disappeared. Yet these missing housing types helped shape the Raleigh many residents love today.

Missing Middle Housing, modest, human-scale homes, offer a path forward. Duplexes, triplexes, cottage courts, townhomes, and accessory dwelling units were once common and provided flexible options for young adults, aging parents, working families, and everyone in between. Over time, zoning restrictions pushed these housing types out, leaving Raleigh with lots of big houses and lots of big apartments but not enough choices in between.

Reintroducing these options is not about changing neighborhood character. It is about restoring choice, stability, and opportunity. A duplex on a quiet street does not harm a neighborhood. It gives a teacher or young professional a chance to live near their job. Townhomes near transit reduce traffic and make daily life more affordable. A backyard ADU can help a senior age in place or give a homeowner extra income. These are practical, people-centered solutions.

Raleigh has already taken positive steps by expanding where duplexes are allowed, legalizing tiny homes, broadening access to ADUs, and reducing parking requirements that made small projects impossible. These moves show the city recognizes the urgency of the housing challenge.

But zoning changes alone are not enough. Raleigh also needs financial tools and partnerships that help small-scale builders, local developers, nonprofits, and community land trusts bring these homes to life. Other cities offer useful models. Portland pairs zoning updates with fee reductions. Cambridge uses affordability overlays. Chapel Hill has shown that well-designed middle housing can fit gracefully into existing neighborhoods. Raleigh can adapt these lessons. Fee waivers, tax abatements, and pre-development grants can make small projects feasible. Partnerships with nonprofit developers and land trusts can secure long-term affordability. Thoughtful public outreach can help residents understand that middle housing strengthens neighborhood character by welcoming more people who contribute to community life.

Design matters too. Context-sensitive standards such as front porches, familiar rooflines, walkable layouts, and appropriate scale ensure middle housing blends seamlessly with existing homes. “More choices, same character” can be more than a slogan.

Missing Middle Housing will not solve every housing challenge, but it is one of the most effective tools Raleigh has to boost affordability, reduce sprawl, support sustainable growth, and help people live closer to jobs, schools, and family. Raleigh is already a great city. It becomes even greater when everyone has a fair chance to live and belong here.

## Executive Summary

Raleigh’s rapid growth has outpaced its housing options, leaving too many residents with only two choices: costly single-family homes or large apartment complexes. Missing Middle Housing - modest, human-scale homes such as duplexes, townhomes, cottage courts, and ADUs, offers a practical path to bridge this gap.

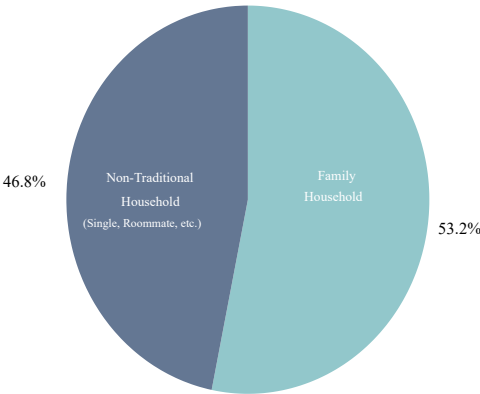
By pairing recent zoning reforms with targeted incentives, community partnerships, and thoughtful design, Raleigh can expand affordable housing choices, support diverse and connected neighborhoods, and create a more inclusive city where people of all incomes can live, work, and thrive. A Truly Great City Isn’t Measured by How Tall Its Skyline Grows, But by How Many People Can Afford to Live Beneath It.

## Research Question

How can Missing Middle Housing expand affordability and stability in Raleigh by creating more housing options?

# Raleigh’s Housing Reality

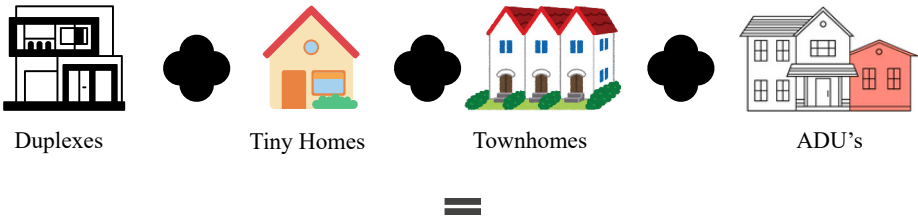
- Raleigh added 32,000+ new residents (2020–2024). Housing supply did not keep pace.
- Household structures are shifting: more singles, seniors, and multigenerational families.
- Many residents face limited choices between costly single-family homes and large apartments.



## Who benefits most?

- Small families: affordable stability near schools
- Seniors: aging in place
- Young adults & workers: attainable homes near job

Middle housing supports inclusive, mixed-income neighborhoods.



More housing choices that give more people easier access to the opportunities these neighborhoods offer.

# Current Policy Landscape

2020

→ Zoning Reform Begins (TC-5-20)

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2021

→ Duplexes Allowed in More Residential Zones (TC-20-21)

→ ADU Expansion

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2022

→ Tiny House Ordinance

→ Parking Minimums Removed (TC-11-21)

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2023

→ Frequent Transit Development Option Introduced

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2024

→ Co-Living Ordinance (TC-7-22)

## Persistent Gaps

- High construction and soft costs
- Slow permitting + bureaucratic delays Limited financing for small builders
- Remaining zoning and design constraints

Raleigh’s zoning reforms have opened more areas to middle housing, and while they’ve led to progress, they haven’t yet produced middle housing at the scale the city needs. This shows that zoning reform alone is not enough to meet demand.

# Strategic Opportunities

## Raleigh is Great But, We Can Do Better

Raleigh has made progress with ADUs, duplexes, and reduced parking rules, but rising housing costs show that zoning reform alone is not enough. To stay welcoming and affordable, Raleigh must expand housing options in walkable, transit-served neighborhoods and support the people who can actually build Missing Middle Housing.

### To scale middle housing, Raleigh should:

- Prioritize walkable, transit-rich locations
- Provide small grants/loans + fee reductions for middle-housing projects
- Support nonprofit + Community Land Trust production
- Improve permitting timelines and design clarity
- Pair zoning flexibility with actual incentives

These steps make small projects feasible for homeowners and small developers.



# Locational Strategy

Middle housing should be placed in walkable, well-connected areas with good transit, schools, and essential services. Building in these locations keeps costs lower, supports sustainability, and adds gentle density without changing neighborhood character. This approach ensures more people can live close to opportunity in Raleigh.



## Key Locational Criteria

| Best Location                       | Why It Works                                                             |
|-------------------------------------|--------------------------------------------------------------------------|
| Walkable neighborhoods              | Supports daily needs without cars; improves affordability.               |
| Transit corridors                   | Reduces parking needs and transportation costs; promotes sustainability. |
| Areas with existing infrastructure  | Lower cost, easier permitting, faster development.                       |
| Near jobs, schools, and services    | Helps families, workers, students, and seniors stay connected.           |
| Neighborhoods with infill potential | Allows gentle density without harming character.                         |

# Who Builds Middle Housing

Most middle housing in Raleigh—such as duplexes, triplexes, townhomes, or ADUs—is not built by big national developers. It comes from homeowners adding small units on their own property and local small developers who work on individual lots or small clusters of homes. These builders create housing that fits neighborhood character because they work at a neighborhood scale.

## What Raleigh Must Do

- Reduce fees for small projects
- Provide pre-approved building plans
- Offer small-dollar construction loans or grants
- Streamline approvals / fast-track infill
- Create clear design standards
- Educate homeowners on ADUs & duplex opportunities

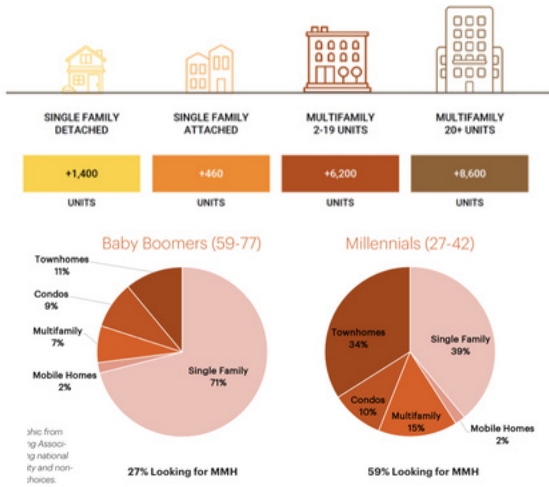
## Key Barriers:

Financial: High interest rates, limited financing for small projects.

Regulatory: Lengthy permitting, impact fees, unclear design rules.

Technical: Lack of simple, pre-approved plans or guidance.

Social: Neighborhood opposition, misconceptions about density



# Tools to Expand Missing Middle Housing

To make middle housing easier to build, Raleigh needs a mix of regulatory, financial, and community tools. Faster permits, grants, fee waivers, and partnerships with land trusts can help turn zoning changes into real homes.

## Regulatory Tools

- Fast-track permits for ADUs, duplexes, triplexes.
- Pre-approved building plans.
- Reduced parking mandates.

## Financial Tools

- Fee waivers for affordable units.
- Small-developer grants or low-interest loans.
- Tax abatements for affordability.

## Community & Partnership Tools

- Partner with Raleigh Area Land Trust.
- Work with nonprofits to maintain long-term affordability.
- Community design workshops to build support.



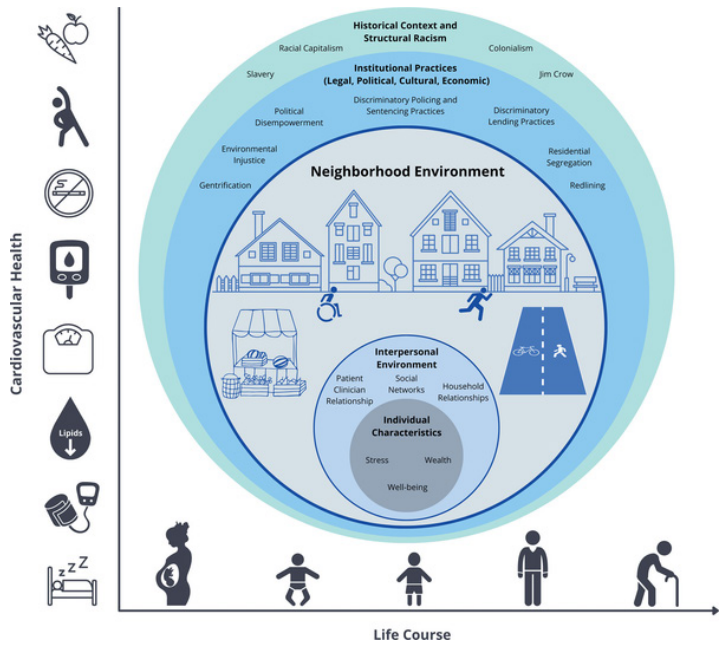


# Design Quality & Neighborhood Character

Good design ensures that middle housing blends seamlessly with existing neighborhoods. Context-sensitive standards such as matching roof pitch, front setbacks, entry orientation, and building height allow duplexes or fourplexes to look like traditional homes. This reduces neighborhood concerns and preserves the character residents value.

## Design Standards:

- Height and massing similar to neighboring homes.
- Single front door appearance options.
- Materials that match local architectural styles.
- Parking placed at the rear, not street-facing.



Guiding Principle: More choices, same character. Gentle density supports inclusivity while protecting neighborhood identity

## “More Choices, Same Character” Principles

The goal of middle housing is not to transform neighborhoods but to expand who can live in them. These principles emphasize gentle density, small, well-designed homes that preserve walkability, greenery, and visual character. Adding choices allows seniors, families, students, and essential workers to live in the same community without changing its core identity.

## Principles:

- Keep the same scale, vary the housing types.
- Protect tree canopy and setbacks.
- Encourage walkability and community interaction.
- Ensure architecture fits the neighborhood style.
- Maintain affordability through diverse unit sizes.



**Strategy:**

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**Vision:**

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- A colorful illustration of a city skyline. In the foreground, a person is running on the left, a person is riding a bicycle in the center, and a family (two adults and a child) is walking on the right. A yellow bus is driving in the middle. The background features various buildings, including a tall white building, a green building, and a yellow building. There are also trees and clouds in the sky.



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