BILLINGS
2045

“It’s a great city that's changing in many ways, it just needs a couple more pushes…”

“Stop trying to be another city and focus on our strengths… create a city that’s not only a great place to live [and] work but a destination.”

“…this is a great community that deserves to have an even greater place to call home.”

Community Survey responses when asked: “What else would you like us to know about living and working in Billings?”

BILLINGS 2045

In compliance with the Montana Land Use Planning Act (MLUPA) Billings 2045 must be adopted prior to the state-mandated deadline. This plan is being released for public review prior to its full completion.

This document is intended to function as an "operating" plan to ensure the City maintains its ability to administer zoning and development regulations as required by state law. If a plan is not adopted by the statutory deadline, the City may be unable to enforce certain land use regulations.

While this draft includes key components that must be adopted to meet state requirements, other sections will be refined through future amendments. The City anticipates bringing forward updates to the plan following adoption to incorporate additional analysis, policy direction, and community input.

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BILLINGS 2045

1 THE PLANNING PROCESS

INTRODUCTION TO BILLINGS

WHY WE PLAN

Comprehensive plans have long served as essential tools to guide communities through growth, change, and long-term investment. Billings 2045 is designed to help shape the future of Billings' economy, land use, neighborhoods, transportation systems, and community amenities over the next twenty years. This plan provides a strategic foundation for the City to prepare for both near-term needs and long-range opportunities—grounding future policy decisions in reliable data, shared community values, and clearly defined priorities. Billings 2045 reflects extensive public participation and collaboration, informed by the voices of residents, local organizations, business leaders, and community stakeholders, as well as the dedicated work of City staff and Interim Planning Commission members. The outcome is a community-driven roadmap that pairs long-term vision with practical, action-oriented steps to help Billings thrive.

The Billings 2045 planning effort began in 2025 to create a unified vision and updated strategy for Montana's largest city as it continues to evolve. As Billings grows and changes, the City faces important questions about where and how development should occur, how to ensure growth can be supported over time, and how to coordinate land use decisions with the infrastructure, services, and facilities residents rely on every day. The plan explores how Billings can strengthen connections between neighborhoods, improve safety and access for all travel modes, and support a range of housing choices that meet the needs of residents across incomes, ages, and household types. It also considers how reinvestment and access to services can be strengthened citywide, while protecting the natural features and open spaces that contribute to Billings' livability. Ultimately, Billings 2045 is intended to guide thoughtful growth that supports long-term community wellbeing, reflects local priorities, and reinforces the distinct character and identity of Billings, from its established neighborhoods to its downtown core.

USERS' GUIDE

The Billings 2045 Land Use Plan is designed to be a comprehensive, compelling, and accessible resource for all community members. It establishes a long-range vision for the city's future, ensuring that as Billings grows, it does so in a manner that is both strategic, and reflective of the community values expressed through this process. The plan is organized into several chapters designed to build upon one another, starting with a broad vision and moving toward more specific implementation strategies.

The Billings 2045 Land Use Plan is organized into seven interconnected sections that build upon one another. The plan moves from understanding the context of the planning process to analyzing the community's existing conditions, and finally to presenting a vision and implementation strategy for the future. The table below outlines the content and purpose of each section.

SECTION	TITLE	PURPOSE
I	THE PLANNING PROCESS	Establishes the foundation for the plan, explaining why planning is critical for Billings' future, how the plan complies with state law, and how community engagement shaped its development.
II	BUILDING COMMUNITY	Provides a detailed analysis of the city's core components, including its natural environment, population and demographic trends, economic drivers, and housing conditions.
III	SERVING THE COMMUNITY	Examines the public services and utilities that support the community, including emergency services, public works, schools, and parks and recreation amenities.
IV	CONNECTING THE COMMUNITY	Focuses on the city's transportation network, summarizing past planning efforts and highlighting the importance of multimodal connections between neighborhoods, parks, and schools.
V	COMMUNITY CHARACTER	Explores the physical fabric of Billings, reviewing historic development patterns, identifying the unique characteristics of its distinct neighborhoods, and describing existing land use patterns.
VI	FROM PRESENT TO FUTURE	Translates the plan's analysis and vision into a tangible guide for growth. This section introduces the "placetype" framework and presents the Future Land Use Map (FLUM) that will guide development for the next 20 years.
VII	FROM PLAN TO REALITY	Outlines the strategy for turning the plan's vision into action. It details the importance of implementation, provides a framework for tracking progress, and discusses the next steps in the planning process.

PHILOSPHY OF PLANNING

Modern U.S. planning emerged in the early 20th century as cities grew rapidly and needed better systems for public health, housing, transportation, and infrastructure. Over time, local governments gained authority to guide land use through zoning and comprehensive planning, supported by model enabling acts in the 1920s and reinforced by court decisions like Euclid v. Ambler (1926). In the late 20th century, environmental policy added stronger expectations for impact analysis and long-range thinking, particularly for actions involving federal lands or funding.

Planning in the Intermountain West

In the Intermountain West, land is at the core of history and culture and often publicly managed. A defining reality of the region is the enormous presence of federal land. In many Intermountain states, the federal government owns or manages a major share of land, more than half in the region overall. This has profound implications. Local communities are not planning only for their own private parcels; they are planning at the edge of vast public landscapes.

This shapes the planning philosophy of the West in several important ways:

- **Planning is shaped by boundaries, not just growth.** In much of the U.S., land use planning often assumes that development will "fill in" over time, spreading outward from cities. In the Intermountain West, growth tends to concentrate in valleys and river corridors, near existing towns and transportation routes, and near scenic amenities and recreation access. At the same time, much of the surrounding land may be federal forest, BLM land, or other public holdings. That means planning often focuses on managing the edges: where private growth meets public lands, wildlife habitat, agricultural land, and sensitive landscapes.
- **Planning is a negotiation between competing values.** Western planning is strongly influenced by the tradition of "multiple use" public land management, meaning that land is expected to support many different purposes at once: grazing, timber, mining, wildlife habitat, recreation, water supply, scenic preservation. Multiple-use history makes planning in the West less like a single vision and more like a structured negotiation among competing interests. Conflict is normal, and planning often becomes a process for balancing legitimate but opposing values.
- **Planning is tied to water and aridity.** The interior West is an arid landscape. In many places, water availability is the single most important constraint on growth. That reality shaped settlement patterns historically and continues to shape planning today. Federal reclamation policy in the early 1900s, especially irrigation works, made large areas habitable and productive, and it also established a long-standing expectation that growth and development must be connected to infrastructure systems that store and deliver water. In the West, planning has always been about the question: "Can this place actually support the level of growth we are allowing?"
- **Planning is deeply influenced by private property rights and local control.** Another defining feature of the Intermountain West is a cultural emphasis on individual ownership and rural independence. Therefore, planning often has to be justified in practical terms, considering infrastructure efficiency, public safety, protecting working lands, preventing costly sprawl, reducing conflict between neighbors. In short, planning in the West tends to be more grounded in practicality and impacts than in purely idealized design.

Montana Planning

Montana reflects all of these Intermountain West dynamics, but in a distinctly Montana way. A significant portion of Montana's land base is federally managed, which means communities are constantly interacting with decisions made by federal agencies. Federal land management affects recreation and tourism, timber and grazing economies, wildfire risk, access and infrastructure needs and environmental quality.

That context means Montana planning often includes an unusually strong coordination component, whether formally or informally, because so many outcomes depend on what happens beyond municipal boundaries.

Montana also has a uniquely influential constitutional context. The 1972 Montana Constitution recognizes both strong protection of private property rights, and an inalienable right to a "clean and healthful environment," along with a duty to protect that environment for present and future generations.

This creates a philosophical tension that is very visible in Montana planning history: Montana planning is often about balancing two values that both carry moral and legal weight, individual rights and long-term stewardship.

Finally, modern Montana land use planning was strongly shaped by the state's experience with rapid subdivision, particularly recreational and speculative subdivision in rural areas. The Montana Subdivision and Platting Act (1973) was enacted because Montanans were concerned about unregulated subdivision patterns, especially in areas without adequate services, infrastructure, or environmental protections.

That history matters because it helps explain why, in many Montana communities, subdivision review has sometimes functioned as the most visible land use "control," even where zoning was limited or politically contested.

> **"Planning must become a forward-looking preventive means of providing people with the tools to preserve the natural and social integrity of their communities and surrounding areas."**
>
> **The Montana Subdivision Inventory Project, 1975**

MONTANA LAND USE PLANNING ACT

In 2023, Montana introduced a new structure: the Montana Land Use Planning Act (MLUPA), now codified in Title 76, Chapter 25, MCA. This law reflects a broader shift in planning philosophy: instead of treating planning as mainly aspirational guidance, MLUPA pushes planning toward being an up-front, evidence-based system that directly supports implementation through zoning and land use regulations.

MLUPA requires Montana cities with a population over 5,000 that are located within counties having a total population of more than 70,000 to adopt land use plans that comply with the Act. The requirements of the land use plan include:

- **Existing conditions and population projections.** The land use plan must include inventories of existing conditions and must analyze how the jurisdiction will accommodate projected population over 20 years and expected impacts.
- **Housing**. The plan must identify and analyze existing and projected housing needs, quantify needed housing types, inventory potential sites, analyze constraints, and describe actions to accommodate needed housing types.
- **Local services and facilities (public safety, utilities, transportation).** The plan must determine existing and anticipated service levels and capacities and include inventories/maps plus identification of capital/service improvements for public safety and emergency services, utilities and the transportation network.
- **Economic development.** The plan must assess existing and potential enterprises, labor force trends, local assets and constraints, available sites, adequacy of supporting services and housing, and financial feasibility of supporting anticipated growth.
- **Natural resources, environment, and hazards.** The plan must include inventories and maps of natural resources, describe resource characteristics and trends, inventory the natural environment, and describe natural hazards.
- **Land use + future land use map.** A land use plan must include a future land use map and written description of the general distribution, location, and extent of land uses.
- **Implementation.** The plan must include implementation measures and schedules, especially around zoning adoption/amendment to achieve substantial compliance, capital improvements programming, facility expansion (costs and revenue sources), and monitoring/evaluation procedures.
- **Continuous public participation.** Public participation is not optional: the Act requires continuous participation with the adoption of a public participation plan.

WHY PLAN NOW?

As we undertake this planning effort, the City of Billings stands at a crossroads. Serving as a state and regional economic hub with great accessibility and a high quality of life, Billings is now faced with the challenge of managing the current and future growth that has led to it's success. While growth can be a sign of a community that is thriving, it also brings to the forefront core issues that require a proactive, strategic, and thoughtful response. The Billings 2045 Land Use Plan provides a vital framework to address and manage the City's future growth potential in the face of these core issues and opportunities. This plan, and the future land use map that accompanies it, are happening at the right place and time to effect a vision for Billings' future that is fiscally responsible, environmentally sound, and equitable for all.

A primary challenge facing Billings is a growing housing crisis. Between 2018 and 2023, the median home sale price in the city rose by over 50%. This rapid appreciation has far outpaced income growth, creating a significant affordability gap. The number of attainable homes has also decreased in the same period, with a current cumulative shortage of nearly 10,000 units as estimated by the Billings Association of REALTORS®, and demand for an additional 26,200 housing units by 2045 to address the growing population. If we continue as usual, based on the existing housing deficit and rate of permit approvals anticipated annually, it will take the City until 2040 to address the unmet need and account for additional growth. This lack of attainable housing directly impacts the city's economic competitiveness, as local employers struggle to recruit and retain a workforce that can afford to live in the community they serve.

Concurrent with the housing shortage are the challenges of managing physical growth. Much of the city's recent expansion has occurred on the West End, leading to concerns about urban sprawl, the loss of productive agricultural land, and the mounting cost of extending and maintaining infrastructure. This pattern of development strains municipal budgets and can lead to inefficiencies in the delivery of public services. The need to continue to revitalize and support the downtown core is a recurring theme in community discussions and a key focus of this planning effort.

THE FISCAL BENEFITS OF PROACTIVE PLANNING

Adopting the Billings 2045 Land Use Plan and Future Land Use Map is not merely an exercise in good governance; it is a fiscally prudent strategy. The alternative, reactive, ad-hoc decision-making, often leads to costly and inefficient development patterns. Well-planned communities can realize significant financial benefits, saving on upfront infrastructure costs for new construction, reducing ongoing service delivery costs, and generating more tax revenue per acre than conventional suburban development patterns.

Billings' own past planning efforts confirm these findings. The 2016 Growth Policy included a detailed scenario planning analysis that compared the fiscal impacts of different growth patterns. The study found that more compact, infill development was significantly more cost-effective than low-density, spread-out development. By strategically guiding future growth, the Billings 2045 Land Use Plan and Future Land Use Map can ensure that new development contributes positively to the city's long-term fiscal health, minimizing the tax burden on existing and future residents and businesses.

BUILDING ON A LEGACY OF PLANNING

This Land Use Plan is not being created in a vacuum. It builds upon a long history of planning in Billings and Yellowstone County, incorporating lessons learned and priorities that remain important while adapting to new and evolving challenges and legal frameworks. In the preparation of the Billings 2045 Land Use Plan and Future Land Use Map, the following plans and policy documents were reviewed for integration and key recommendations to carry forward as part of this planning effort:

PLAN	YEAR	KEY CONTRIBUTION
City of Billings/Yellowstone County Growth Policy	2003	Early collaborative effort to manage regional growth
Yellowstone County/City of Billings Growth Policy	2008	Updated regional framework for coordinated development
City of Billings Growth Policy	2016	Introduced scenario planning to evaluate fiscal impacts of growth patterns
Long Range Transportation Plan	2023	Guides transportation infrastructure investments
Bike & Trail Master Plan	2016	Provides framework for non-motorized transportation and recreation
South Billings Master Plan	Various	Guides development in the South Billings area
West Billings Neighborhood Plan	Ongoing	Creates vision for continued development of West Billings
Billings Heights Neighborhood Plan	Ongoing	Guides development in the Heights neighborhood

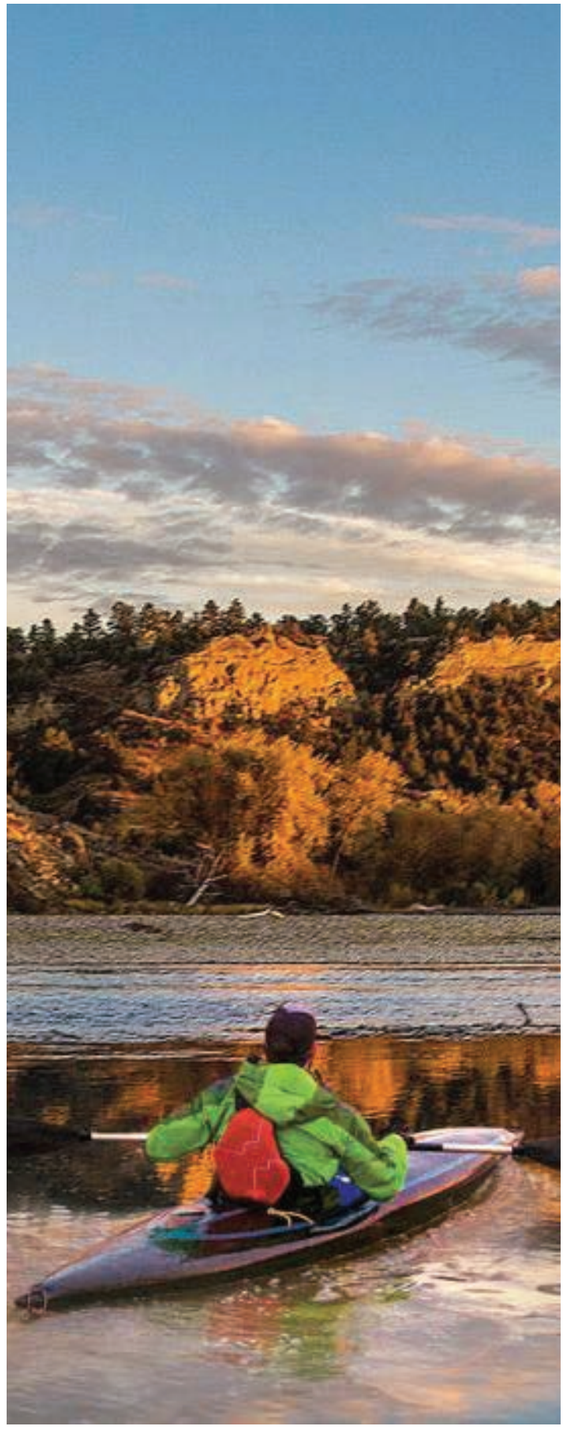
Additional plans and policies were reviewed for background and area-wide context in preparing the Billings 2045 Land Use Plan. These included:

- Broadview Community Profile (2004)
- Shepherd Community Action Plan (2004)
- Lockwood Growth Policy (2016)
- Minnesota Avenue Master Plan (2001; 2003 addendum)
- Billings Exposition Gateway Concept Plan (2013)
- Downtown Billings Framework Plan (1997)
- East Billings Urban Renewal District (EBURD) Master Plan (2009)
- South Billings Master Plan (2012)
- Infill Development Policy (2011)
- Founders Park Area Urban Renewal Analysis Report (2020)
- City of Billings Planning & Community Services Department (PCSD) Annual Report 2024
- North Park Neighborhood Plan (2008)
- Central-Terry Park Neighborhood Plan (August 1999)
- Urban Renewal Plan for the South Billings Boulevard Urban Renewal Area (SBBURD) (2008)
- The Highland Neighborhood Plan (2007)
- The Billings Heights Neighborhood Plan (2006)
- North Elevation Neighborhood Plan (1994)
- Northwest Shiloh Area Plan (2005)
- The South Side Neighborhood Plan (2008)

A complete summary of these policies can be found in Appendix A of this plan.

The Billings 2045 Land Use Plan and Future Land Use Map is more than just a document; it is a foundational tool for public and private decision-making. As required by the Montana Land Use Planning Act, this plan will serve as the primary policy guide for all land use and development-related matters within the city.

- For the City Council, Planning Commission, and other decision-makers, the plan provides a consistent, publicly-vetted framework for evaluating land use proposals, prioritizing capital investments, and coordinating with regional and state partners. It ensures that individual decisions align with the community's long-term vision. When a new subdivision or zone change is proposed, its alignment with the Future Land Use Map and the plan's goals will be a central requirement in the review process.
- For City staff, the plan serves as a day-to-day reference for aligning departmental programs, reviewing development applications, and making recommendations that are consistent with the plan's goals and the Future Land Use Map.
- For residents, property owners, and business owners, the plan offers a degree of predictability. It provides a clear indication of how the areas around their homes and businesses are expected to evolve over time, allowing them to make informed decisions about their own investments. It also outlines numerous opportunities for public participation in the ongoing planning process.
- For developers and the real estate community, the plan clarifies the city's priorities and expectations. By identifying areas suitable for growth and the types of development desired in different parts of the city, the plan helps to streamline the development review process and direct investment to where it will be most beneficial for the community.



"Managing growth is not about stopping it, but shaping it responsibly."

The Montana Subdivision Inventory Project, 1975

KEEPING THE PLAN RELEVANT: A LIVING DOCUMENT

A plan for the future must be able to adapt to changing circumstances. The Billings 2045 Land Use Plan and Future Land Use Map is intended to be a living document. The world will inevitably change over the next 20 years, and the plan must be flexible enough to respond to new challenges, emerging trends, and evolving community priorities.

To ensure its continued relevance, the plan will be subject to regular monitoring and periodic updates. The implementation chapter will establish a process for tracking progress toward the plan's goals and measuring key performance indicators. This will allow the city to assess what is working and what is not, and to make course corrections as needed.

Planning best practices as well as state law recommends a comprehensive review and update of the plan **every five years**, with an initial review two years after adoption. This regular cycle of review will provide a formal opportunity for the community to revisit the plan's vision and policies, ensuring that it remains a true and accurate reflection of Billings' aspirations for the future. By embracing this process of continuous improvement, we can ensure that the Billings 2045 Land Use Plan remains a powerful and effective tool for shaping a prosperous and livable city for generations to come.

SETTING THE STAGE FOR BILLINGS' FUTURE

A BRIEF HISTORY OF BILLINGS

From its inception as a railroad town to its current status as Montana's largest city and a regional economic hub, Billings has a history defined by steady growth and strategic adaptation, fueled by its central location in the state. The city's story is not just one of population growth, but of key economic and social turning points that have shaped its identity and continue to influence growth and development patterns today. Understanding the City's history is crucial to contextualizing the challenges and opportunities that lie ahead as we plan for 2045.

NATIVE SETTLEMENTS

The Yellowstone Valley has been inhabited for millennia, with evidence of human presence dating back to at least 2600 BC. Long before the arrival of the railroad and the founding of Billings, the Yellowstone Valley was home to Indigenous peoples whose deep connections to the land shaped the region for thousands of years. Tribes including the Crow (Apsáalooke), whose ancestral territory encompasses much of south-central Montana, as well as the Northern Cheyenne and others, used the valley as a vital corridor for seasonal migration, hunting, trade, and cultural practices. The Yellowstone River provided water, fertile land, and abundant wildlife, making it a central feature of Indigenous life. Sites such as the Pictograph Cave State Park offer enduring evidence of this long-standing presence, preserving rock art that reflects spiritual beliefs and daily experiences. These Native communities maintained complex social, economic, and ecological systems long before Euro-American settlement, and their enduring cultural ties to the region remain an essential part of Billings' broader historical narrative.

THE MAGIC CITY: A RAILROAD BEGINNING

The modern city of Billings that we know today was born from the westward expansion of the Northern Pacific Railroad. In 1882, the railroad laid out the townsite, naming it after its then-president, Frederick H. Billings. The arrival of the railroad was a significant event for the region, transforming the landscape and the economy almost overnight. The town of Billings grew so quickly—from just a handful of buildings to over 2,000 in a matter of months—that it earned the nickname the "Magic City." This explosive start established a pattern of growth that would characterize Billings for the next century and a half.

FROM AGRICULTURE AND ENERGY TO A DIVERSIFIED ECONOMY

The railroad provided a critical link to national markets, allowing Billings to become a center for agricultural trade in the state. The fertile Yellowstone Valley supported a thriving agricultural economy, with sugar beets becoming an important commodity. Livestock auctions and supportive agricultural business further solidified the city's role as a commerce hub in the heart of a vast agricultural region.

A second major economic boom arrived with the discovery of oil in Montana and Wyoming in the early 20th century. Billings was perfectly situated to become the region's energy capital, and a hub for transporting these goods and services far beyond Montana state lines. Refineries including Yale Oil (1929) and the Carter Oil Company (1947) were established, and the city became a hub for energy production, a role that was amplified during the OPEC oil embargo of the 1970s and the Bakken oil boom of the 2010s. Today, three of Montana's oil refineries are located in Yellowstone County, cementing the energy sector's importance to the local economy.

THE REGIONAL HUB EMERGES

Following World War II, Billings entered a new phase of development, transforming into the primary financial, medical, and cultural center for a vast trade area that now stretches over 125,000 square miles and serves more than half a million people in the intermountain west. he construction of Interstate 90 in the 1960s further enhanced the city's connectivity and its role as a retail and wholesale trade destination in Montana and beyond. The city's healthcare sector, anchored by Billings Clinic and St. Vincent Healthcare (now Intermountain Health), has grown into a major economic driver and the top employing industry in Yellowstone County.

The latter half of the 20th century saw significant urban development, including the construction of Montana's first high-rises in the downtown core and the expansion of the city's footprint with new residential neighborhoods and commercial centers. Despite national economic downturns in early 2000s, and considerable market and housing fluctuations as a result of the COVID 19 pandemic beginning in 2019, Billings has consistently demonstrated remarkable economic resilience among its peers in the Rocky Mountain west.

TIMELINE OF KEY TURNING POINTS

The following timeline highlights key milestones in Billings' history that have significantly impacted its growth, economic prosperity, and community development.

1882

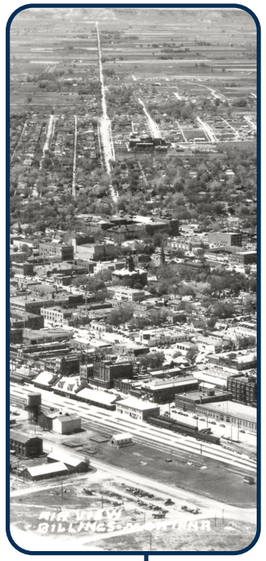
Founding of Billings by the Northern Pacific Railroad
Established the city as a transportation hub and catalyzed its initial, rapid growth.

1904

Sugar Beet Processing Plant Opens
Solidified the importance of agriculture as a foundational economic sector.

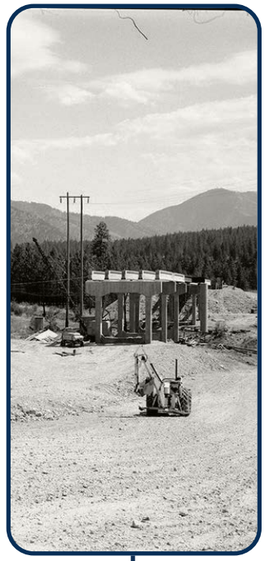
1920s

Discovery of Oil in Region
Initiated Billings' long-standing role as a major energy center.



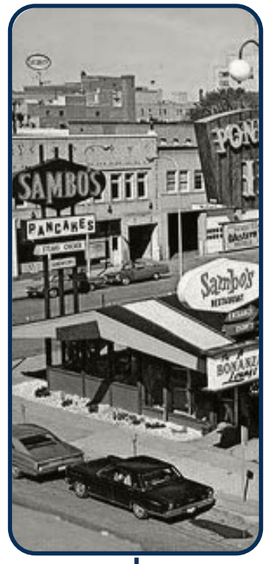
1940s

Post WWII Expansion
Marked the city's transformation into a regional hub for healthcare, finance, and culture.



1960s

Interstate 90 Construction
Improved transportation connectivity, reinforcing the city's status as a commercial center.



1970s

Energy Boom and Downtown Growth
Spurred by the OPEC oil embargo, this era saw major downtown development and the construction of the city's first high-rises.

1990s

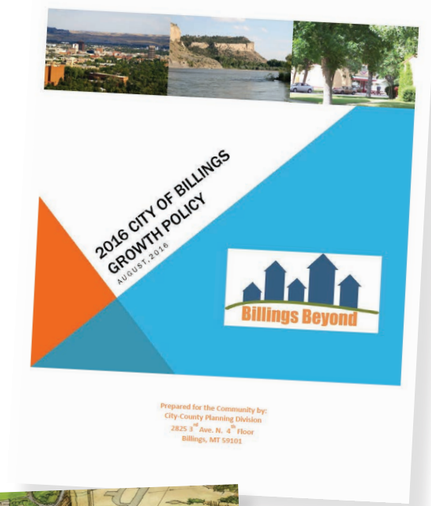
Economic Diversification
Growth of the service sector, healthcare, and retail balanced the city's traditional reliance on agriculture and energy.

2010s

Bakken Oil Boom
A new energy boom brought further economic prosperity and population growth, alongside challenges related to housing and infrastructure, especially as the City grew to the west.

THE ROLE OF PAST PLANS IN SHAPING BILLINGS' FUTURE

The Billings 2045 Land Use Plan is the latest step in a long and consistent history of community planning aimed at managing growth, enhancing quality of life, and ensuring economic prosperity. Over the years the City of Billings, often in partnership with Yellowstone County, has engaged in comprehensive planning to guide its development. These past efforts provide a rich foundation of community input, trends and data analysis, as well as policy direction that has been evaluated and, in some cases, carried forward in the creation of this plan and future land use map.



THE EVOLUTION OF GROWTH POLICIES

In Montana, the Growth Policy has long been the planning tool used to establishes a long-range vision and policy for a community. Billings has a robust history of utilizing this tool, with major updates creating a clear narrative of the community's evolving priorities.

- The 2003 and 2008 Growth Policies: These foundational documents, developed jointly by the City and Yellowstone County, established a comprehensive framework for managing growth during a period of significant expansion. The 2008 update was a response to the rapid changes occurring in the early 2000s, adding over 30 new goals and 200 new implementation strategies based on extensive public input. Key issues identified in these early plans included the need to manage urban sprawl, preserve neighborhood character, address a lack of affordable housing, and protect natural resources like the Yellowstone River and the Rimrocks. A new "Community Health" element was added in 2008, demonstrating a growing awareness of the link between the built environment and public well-being.
- The 2016 "Billings Beyond" Growth Policy: Nearly a decade later, the 2016 Growth Policy marked a significant shift, as it was the first comprehensive plan developed solely by the City of Billings. This plan focused intently on the fiscal realities of growth. Its vision statement emphasized managing growth by "encouraging development within and adjacent to the existing City limits" but giving preference " to areas where City infrastructure exists or can be extended within a fiscally constrained budget." This focus on cost-effective, orderly growth was a direct response to the increasing demand on public services and infrastructure resulting from unchecked development. The 2016 Growth Policy was guided by seven core community goals derived from public input: Essential Investment, Mobility & Access, Prosperity, Home Base, Place Makers, Strong Neighborhoods, and Community Fabric.

1.1 SELECTION OF PAST AND CURRENT PLANS

In addition to the City and City-County generated growth policies, a vast array of site-specific, regional, corridor, and master plans were developed for the region, all working toward creating a cohesive and supportive environment for continued growth and economic prosperity. The multitude of plans reviewed as part of this effort were listed in Chapter 1.1, with a more detailed analysis of each document included in this plan's appendices [Appendix A]. Through this analysis, and across these different planning eras and efforts, a consistent set of themes and community values began to emerge. These recurring priorities underscore their deep importance to the residents of Billings and form the bedrock upon which the 2045 plan is built. These themes are further evolved in Chapter 1.3.

Beyond the previous growth policies, Billings has undertaken numerous other master plans and studies that address specific facets of the community. The 2023 Long Range Transportation Plan (LRTP) outlines a 20-year vision for transportation infrastructure. The 2017 Comprehensive Parks and Recreation Master Plan provides a roadmap for the city's park system, and various Urban Renewal District plans guide the revitalization of key commercial and industrial areas. These topic specific plans are being incorporated by reference into Billings 2045, using their content to inform elements of this land use document. This comprehensive approach, where land use, transportation, recreation, and economic development are planned for together, ensures that all elements of the community are working toward a shared vision.

The Billings 2045 plan is the direct inheritor of this legacy. It will build upon the extensive data, public input, and policy successes of these previous efforts while addressing the new challenges and opportunities facing the city today and in the decades to come.

CORE THEME	EMPHASIS IN PAST PLANS
Fiscal Sustainability	The 2016 Growth Policy established fiscal analysis as a cornerstone of planning, demonstrating through scenario modeling that infill development yields the highest return on investment (14.1%) compared to sprawling growth patterns. The 2011 Infill Development Policy (Resolution 11-19128) formalized this priority, citing that downtown property tax values per acre are seven to eight times higher than commercial development in West Billings, making compact development fiscally essential for long-term city sustainability.
Infrastructure Capacity	Past plans consistently identified infrastructure deficits as critical barriers to sustainable growth. The 2008 Growth Policy emphasized contiguous development focused where infrastructure exists or can be efficiently extended, while the South Billings Master Plan (2012) and EBURD Master Plan (2009) prioritized stormwater management, street upgrades, and utility extensions as prerequisites for redevelopment. The Northwest Shiloh Area Plan (2005) used a Plan Area Suitability Map to direct growth based on existing infrastructure capacity, preventing haphazard sprawl.
Transportation Connectivity	The 2008 Growth Policy introduced Community Health as a planning element, emphasizing roadways that accommodate pedestrians and cyclists alongside vehicles. The EBURD Master Plan (2009) advocated for "Complete Streets" policies ensuring all modes of travel are accommodated, while neighborhood plans like North Park (2008) and Highland (2007) focused on traffic calming, safe routes to schools, and reducing institutional traffic impacts on residential areas. The City adopted its first Complete Streets Policy in 2011, and it is still in effect today.
Housing Diversity	The 2016 Growth Policy guidelines called for zoning that supports a mix of housing types to create "Strong Neighborhoods," while the Lockwood Growth Policy (2016) specifically recommended increasing residential densities from large-lot standards to 4-10 dwelling units per acre. The South Billings Master Plan (2012) prioritized affordable housing and preventing displacement, emphasizing the community's directive to "build this neighborhood with us, not without us."
Equitable Reinvestment	Urban renewal plans for South Billings (2008), East Billings (2009), and the ongoing Downtown North 27th Street Urban Renewal District used Tax Increment Financing to address blight and stimulate reinvestment in underperforming areas. The South Billings Master Plan (2012) integrated physical improvements with social and economic strategies, focusing on health, safety, and community empowerment. The 2016 Growth Policy's scenario analysis demonstrated that prioritizing development within existing city limits provides superior fiscal returns while supporting established neighborhoods.
Natural Resource Protection	The 2008 Growth Policy established goals to protect the Yellowstone River ecosystem, ensure sustainable water supply, and minimize wildfire risk. The Lockwood Growth Policy (2016) proposed a "resource conservation overlay zone" to protect natural areas along the Yellowstone River. The EBURD Master Plan (2009) pioneered "Green Streets" approaches integrating bioswales and rain gardens into streetscapes for innovative stormwater management, positioning environmental considerations as integral to infrastructure design.
Community Identity	The Downtown Billings Framework Plan (1997) established the foundational vision for downtown as the "heart and soul of the community," creating distinct districts and a unified "Kit of Parts" for cohesive streetscape identity. Neighborhood plans like Central-Terry Park (1999) and North Elevation (1994) emphasized preserving historic character through design guidelines and proactive zoning. The Billings Heights Plan (2006) sought to create a "premier community" with a stronger sense of place through branch libraries, community centers, and Main Street revitalization.

FROM CONTEXT TO ACTION: WHY EXISTING CONDITIONS MATTER

A comprehensive plan is fundamentally about shaping the future. However, to chart a course forward we must start with a firm understanding of the present context and conditions. The history of past planning efforts provides the narrative of the Billings' community's intentions over the years, but it is the rigorous analysis of existing conditions, the demographic, economic, and physical realities of Billings today, that provides the essential context for future recommendations to guide policy and action. This data-driven foundation ensures that the Billings 2045 Land Use Plan is not an abstract vision, but a realistic, responsive, and actionable framework for the next two decades.

Data on population, housing, and the economy are more than just statistics; they tell the story of a dynamic, growing city. They reveal the pressures on infrastructure, the demands on housing, and the opportunities for strategic investment. By understanding these trends, we can move from being reactive to proactive when thinking about future growth, connecting context to concrete action.

THE STORY IN THE DATA: CONNECTING CONDITIONS TO PLANNING IMPLICATIONS

The Plannin Implications table illustrates how specific data points about the current state of Billings directly translate into critical considerations for the future. These connections are the building blocks of the goals, policies, and implementation strategies that will be detailed in the subsequent sections and chapters of this plan.

By grounding our vision for the future in these present-day realities, the Billings 2045 Land Use Plan and Future Land Use Map can create a framework for decision-making that is both aspirational and achievable. The history and data presented in this chapter do not dictate the future, but they illuminate the path forward, ensuring that as Billings continues to grow, it does so in a way that is strategic, sustainable, and true to the values of the community.

TABLE 1.1 PLANNING IMPLICATIONS

EXISTING CONDITION (THE "WHAT")	PLANNING IMPLICATION (THE "SO WHAT?")
Population Growth: The city's population grew by 3.7% between 2020 and 2024, reaching an estimated 121,483 residents.	This steady growth necessitates planning for expanded infrastructure, public services, and a sufficient supply of diverse housing types to accommodate new residents while maintaining quality of life.
Housing Affordability Gap: The median household income in Billings is $74,400, while the estimated annual income required to qualify for a traditional mortgage on a median-priced home ($385,000) is approximately $100,000.	This significant gap highlights the critical need for strategies that promote housing affordability, including diversifying the housing stock, exploring innovative housing models, and addressing barriers to development.
Economic Engine: Healthcare is the largest employment sector, providing over 15,000 jobs. However, the highest-paying industries are Mining/Extraction and Utilities.	Planning must support the continued strength of the healthcare sector while also fostering diversification and growth in other high-wage industries to create a resilient and prosperous economy with opportunities for all residents.
Aging Population: Nearly 19% of the Billings population is 65 years or older, a figure that has been steadily increasing.	This demographic trend requires a focus on accessible housing, transportation options for non-drivers, healthcare services, and community amenities that support aging in place and enhance the quality of life for seniors.
Infrastructure Demands: The 2023 Long Range Transportation Plan identifies $934 million in transportation needs over the next 20 years, including major roadway, interchange, and trail projects.	Land use decisions must be closely coordinated with infrastructure capacity and planned investments. Promoting infill and development in areas with existing services, as prioritized in the 2016 Growth Policy, becomes a key strategy for managing fiscal resources effectively.

COMMUNITY ENGAGEMENT

Public engagement has been a foundational element of the Billings Land Use Plan process, ensuring the plan reflects local values, priorities, and lived experience while meeting the requirements of Montana's planning framework.

Engagement to date has included targeted stakeholder conversations, a citywide community survey, and Community Planning Week in November of 2025, which included workshops, open houses, mapping exercises, visual preference activities, and written input tools.

In addition to these consultant-led efforts, City staff also conducted engagement with a variety of community groups and participated in outreach at festivals and other public events to broaden participation and reach residents where they already gather. Collectively, this multi-layered engagement approach has provided both broad, citywide feedback and detailed, location-specific insight that directly informs plan recommendations.

Meaningful public engagement is essential to the planning process because it builds trust, improves decision-making, and strengthens implementation by ensuring policies are grounded in community needs rather than assumptions. This is especially important under the Montana Land Use Planning Act (MLUPA), which emphasizes transparency, accountability, and public participation as key components of effective local land use planning.

REACHING THE COMMUNITY

STAKEHOLDER CONVERSATIONS

Stakeholder conversations conducted on August 4 and 5, 2025 provided broad input on Billings' long-term growth, development patterns, and community priorities. Across all topic areas, stakeholders emphasized that future growth must be more intentional, coordinated, and aligned with long-term fiscal, environmental, and community capacity. Participants consistently highlighted that uncoordinated outward growth places increasing pressure on infrastructure, public services, housing affordability, and quality of life, while weakening the city's identity and fiscal sustainability.

A central theme across meetings was the interconnected nature of land use decisions. Infrastructure capacity, housing availability, transportation access, public safety, schools, parks, public health, and economic development were repeatedly described as inseparable. Stakeholders stressed that the growth policy should better align where and how development occurs with the City's ability to provide utilities, services, and facilities over time. Many participants emphasized the need for stronger coordination between the City, County, school districts, utilities, and regional partners to avoid fragmented growth patterns and inefficient investment.

The following summaries reflect the primary themes raised in each stakeholder meeting and illustrate how topic-specific concerns collectively inform Billings' long-term growth policy direction.

HOUSING & COMMUNITY DEVELOPMENT

Stakeholders highlighted an ongoing housing shortage affecting affordability, equity, and workforce stability. Participants emphasized the need for a broader range of housing options, incentives for infill and redevelopment, and stronger coordination between housing, transportation, and community services. Growth policy was viewed as a critical tool for reducing regulatory barriers and aligning public and private investment to expand housing opportunities.

COMMUNITY CHARACTER

Community character stakeholders emphasized that Billings' identity, historic resources, and cultural assets are essential to long-term livability and economic vitality. Participants expressed concern that suburban development patterns and sprawl erode neighborhood character and sense of place. Stakeholders emphasized the importance of downtown revitalization, arts and culture, historic preservation, and context-sensitive design, and stressed that growth policy should balance new development with protection of established neighborhoods and community identity.

ECONOMIC DEVELOPMENT

Economic development stakeholders focused on balancing growth with fiscal sustainability and long-term competitiveness. Participants emphasized the importance of downtown vitality, placemaking, and infill development, while expressing concern that continued outward expansion undermines infrastructure efficiency and economic returns. Workforce attraction, housing affordability, and stronger coordination between economic development and land use planning were recurring themes.

ENVIRONMENT

Environmental stakeholders stressed that growth must reflect environmental capacity and long-term sustainability. Key concerns included groundwater depletion, agricultural land loss, and the cumulative impacts of sprawl. Participants emphasized the need for growth policy to incorporate life-cycle cost considerations, protect natural resources, and better coordinate City and County planning efforts to avoid environmentally and fiscally unsustainable development patterns.

NEIGHBORHOOD TASK FORCE

Neighborhood representatives emphasized equity, neighborhood identity, and quality of life. Stakeholders raised concerns about infrastructure disparities, inconsistent code enforcement, and uneven access to services across the city. Participants stressed the importance of neighborhood-level engagement and the need for growth policy to support reinvestment in existing neighborhoods while strengthening coordination across city departments.

PUBLIC HEALTH & SERVICES

Public health stakeholders emphasized the connection between land use, housing, transportation, and health outcomes. Participants highlighted gaps in behavioral health services, supportive housing, and access to care, particularly for vulnerable populations. Growth policy was viewed as an opportunity to support neighborhood-based services, improve access, and strengthen coordination between health providers, nonprofits, and local governments

SCHOOLS

Education stakeholders emphasized that school facilities, funding, and enrollment pressures are closely tied to growth patterns. Participants highlighted overcrowding, aging facilities, and challenges with long-term planning and land acquisition. Growth policy was viewed as an important framework for improving coordination between school districts and local governments to ensure that educational infrastructure keeps pace with growth.

TRANSPORTATION & MOBILITY

Transportation stakeholders emphasized congestion, funding limitations, and gaps in transit, pedestrian, and bicycle infrastructure. Participants stressed the need to integrate land use and transportation planning, support multimodal options, and improve safety and accessibility across neighborhoods. Growth policy was seen as a key tool for promoting complete neighborhoods and reducing long-term transportation costs.

PARKS, TRAILS, & OPEN SPACE

Stakeholders emphasized the importance of designing parks, trails, and open space systems that are fiscally sustainable and function as essential infrastructure. Participants highlighted challenges related to maintenance burdens, fragmented open spaces, and jurisdictional responsibilities, while emphasizing opportunities to strengthen trail connectivity, river access, and conservation. Growth policy was seen as a tool to better align development with long-term parks and open space needs.

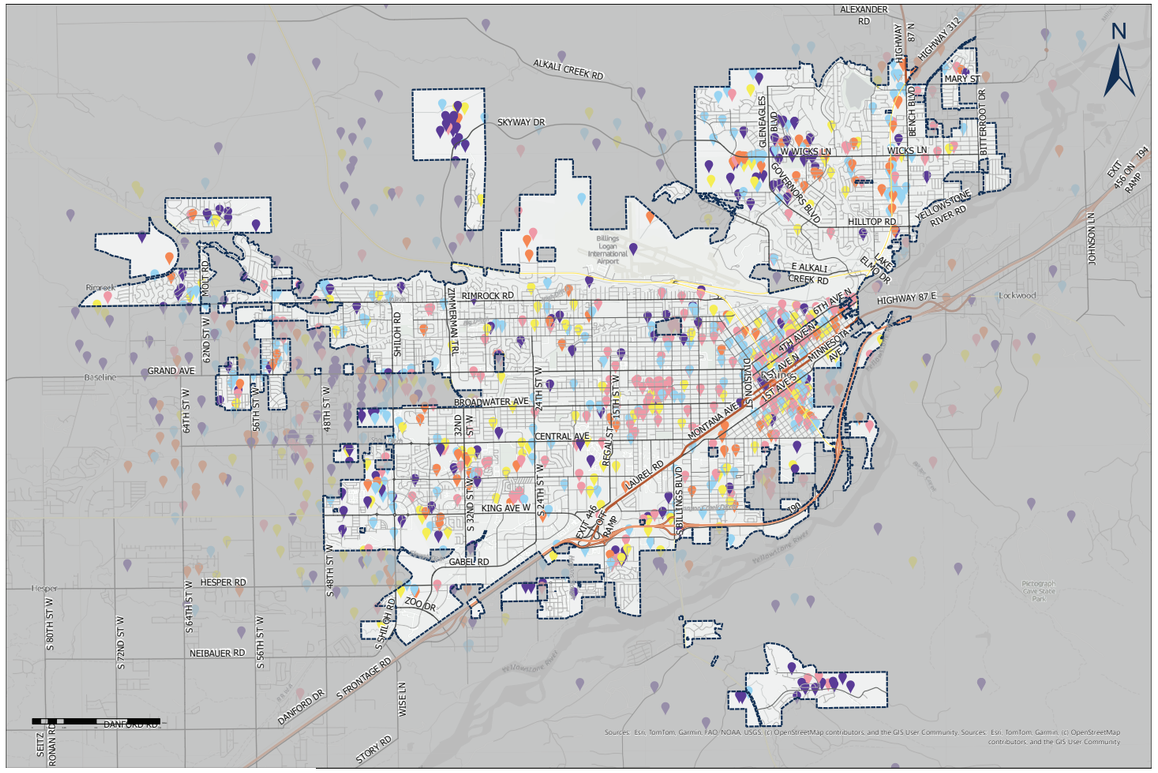
PUBLIC SAFETY

Public safety stakeholders emphasized that growth and annexation are outpacing police, fire, and emergency medical service capacity. Participants highlighted staffing challenges, rising service demands, and funding limitations. Stakeholders stressed that growth policy should better align development patterns with public safety capacity and support prevention-oriented approaches that address housing stability, behavioral health, and community trust.

UTILITIES & INFRASTRUCTURE

Stakeholders emphasized that existing water, sewer, stormwater, power, and roadway systems are under increasing strain from growth. Participants stressed that inconsistent standards, fragmented service areas, and funding limitations complicate long-term planning and directly affect housing affordability. There was strong consensus that growth policy should promote regional coordination, clearer infrastructure sequencing, and alignment between land use decisions and long-term infrastructure capacity.

1.2 SURVEY MAP



- Infill housing
- Single-family housing
- Multi-family housing
- Employment opportunities
- Neighborhood-scale commercial or retail

COMMUNITY SURVEY

The community survey was a key component of the Land Use Plan process, designed to gather broad public input on growth priorities, community values, and long-term planning considerations for Billings. The survey was open from September 4 through December 31, 2025, was advertised citywide and through the project website, and received a total of **1,169 responses.** The strong participation reflects a high level of community interest in how Billings grows and changes over time .

Across responses, residents consistently emphasized the importance of managing growth in a way that balances affordability, infrastructure capacity, and quality of life. Housing cost and housing choice emerged as central concerns, with respondents expressing a desire for a wider range of housing options that meet the needs of different households, income levels, and life stages. Many responses highlighted the need for thoughtful development patterns that support livability while avoiding unplanned or inefficient growth.

Transportation and connectivity were also recurring themes. Respondents prioritized safe and efficient movement throughout the city, including improved traffic circulation, walkability, biking infrastructure, and expanded public transit options. These themes reflect a desire for a more connected city where residents can access daily needs, employment, and recreation through multiple transportation choices.

Environmental quality, open space, and recreation were widely valued as defining assets of Billings. Access to trails, parks, and nearby natural areas was frequently cited as both a strength and a priority for future investment. At the same time, respondents expressed concern about protecting these resources as growth continues, emphasizing the need to align land use decisions with long-term environmental stewardship.

Finally, survey responses reflected strong interest in the overall quality of development, including city appearance, community character, public safety, and economic opportunity. Many respondents expressed support for reinvestment in existing areas, downtown vitality, and coordination with regional partners to ensure growth benefits the broader community. Together, these themes provide clear guidance for shaping land use policies that are inclusive, balanced, and responsive to community values.

Full survey results are provided in the appendix. Additional survey findings are referenced throughout the plan where they relate directly to specific plan topics.

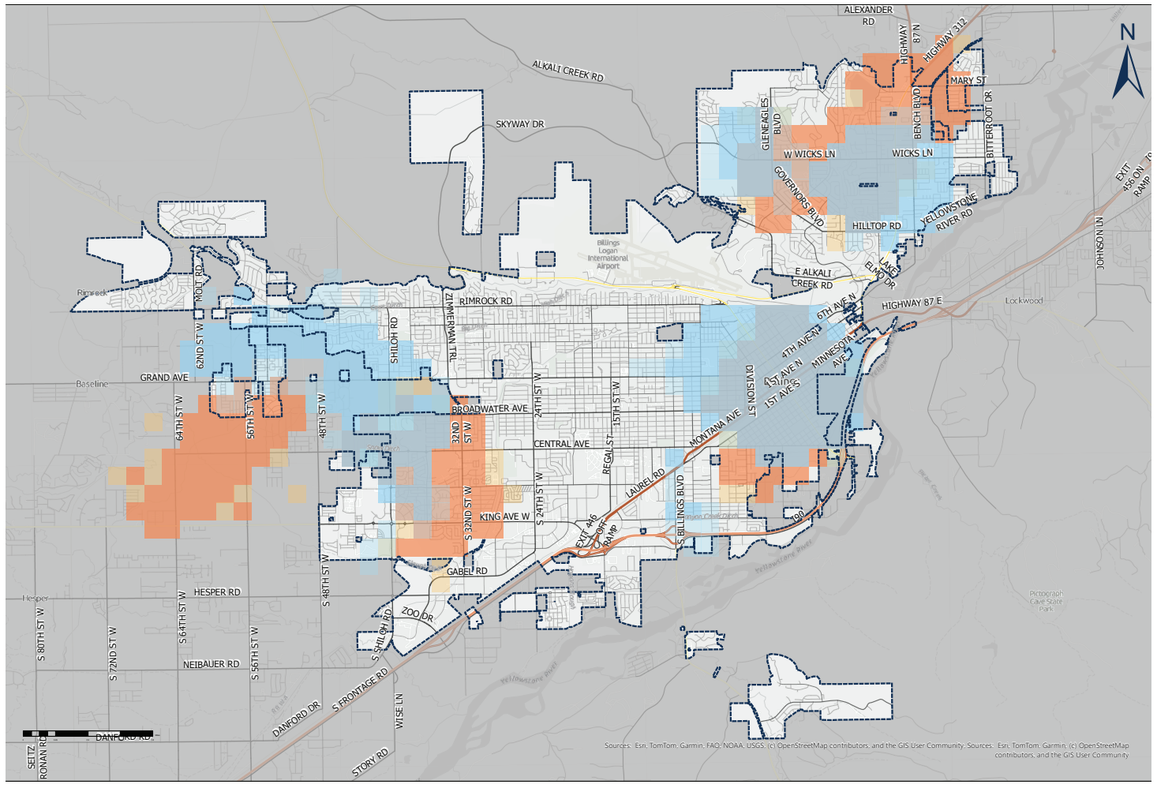
Survey Map

Accompanying the survey was a web-based mapping exercise for participants to contribute to. The exercise asked the community to consider where growth would best be located in the city, focusing on five distinct types of development:

- Infill housing
- Single-family housing
- Multi-family housing
- Employment opportunities
- Neighborhood-scale commercial or retail development

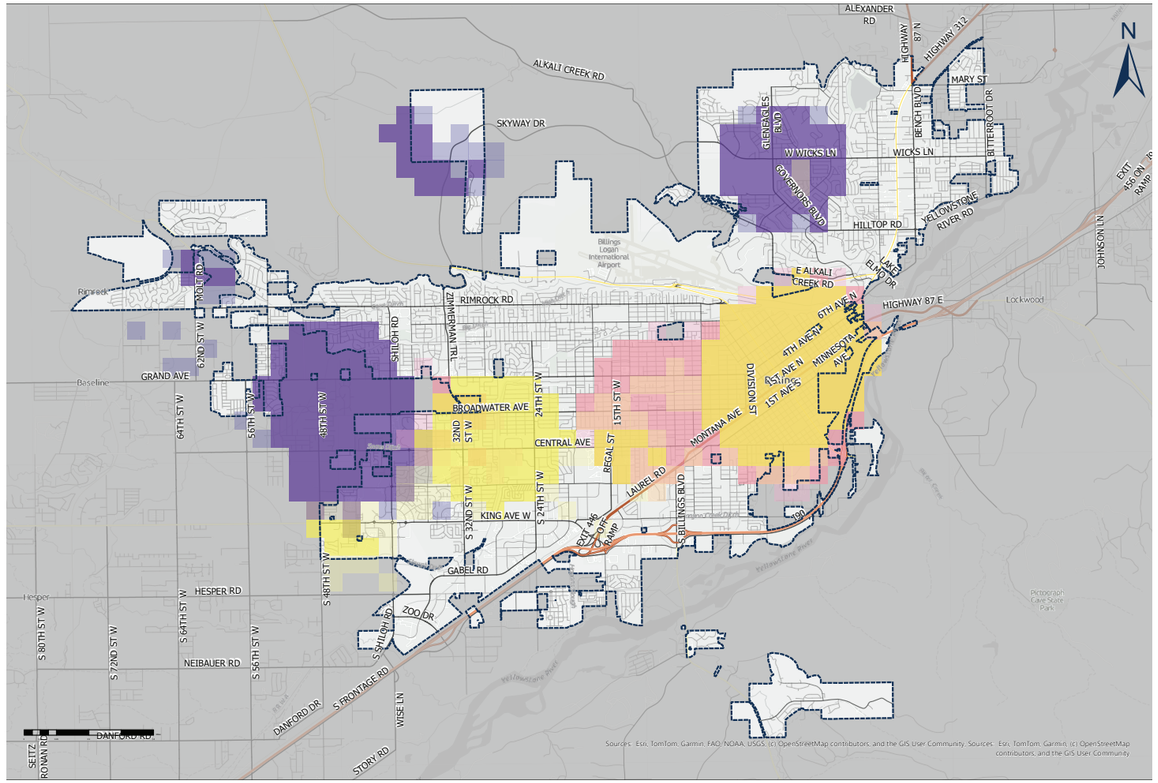
Through hot spot analysis, key locations for targeting growth emerged. The raw data is shown on the left, and composite hot spot analysis maps are located on the following page. Closer analysis of the mapping exercise is included throughout the plan.

1.3 COMMERCIAL HOTSPOT MAP



- Employment opportunities
- Neighborhood-scale commercial or retail

1.4 RESIDENTIAL HOTSPOT MAP



- Infill housing
- Single-family housing
- Multi-family housing

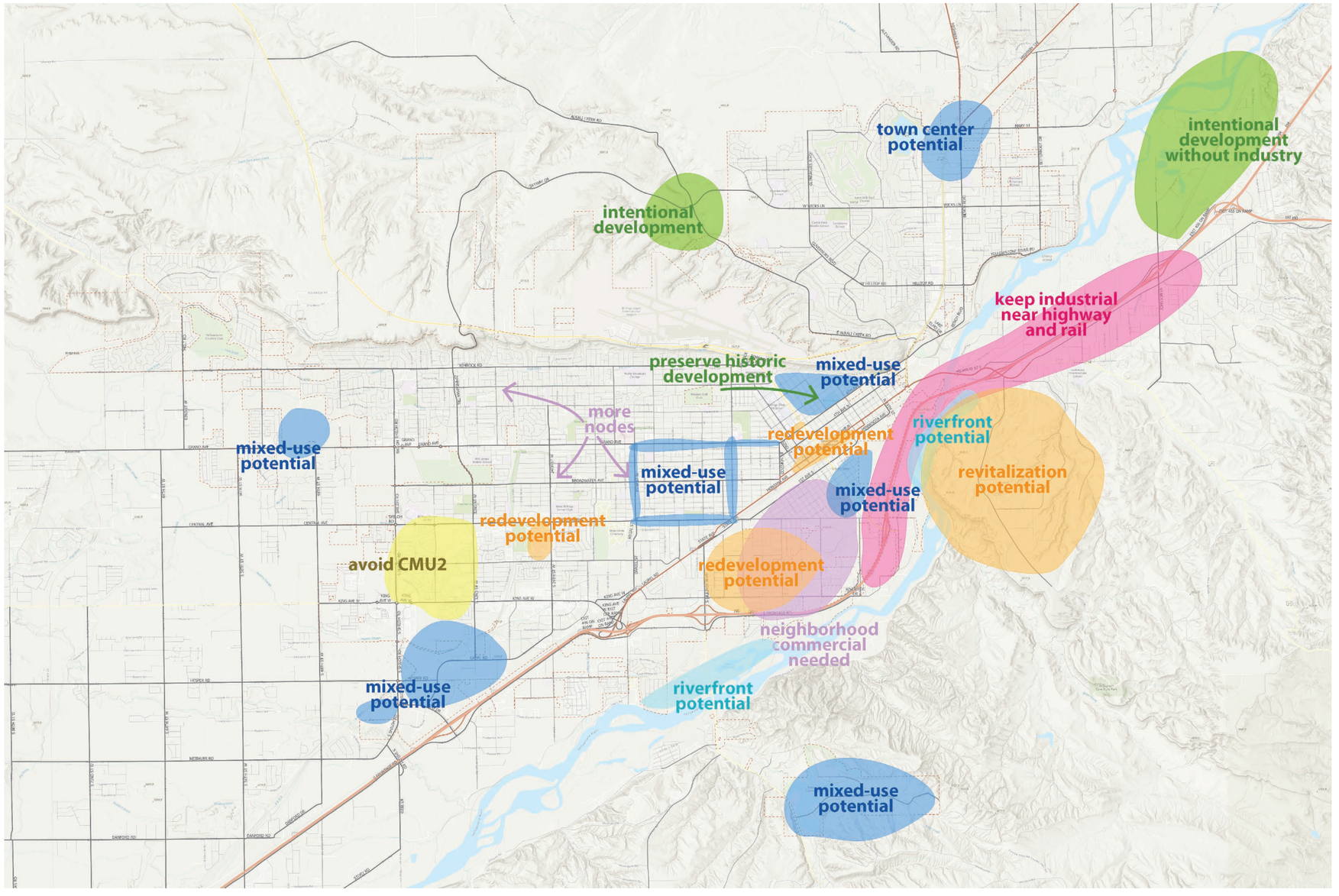
COMMUNITY PLANNING WEEK

Community Planning Week was held from November 17 through November 21, providing multiple opportunities for residents and stakeholders to engage directly in the Land Use Plan process. During the week, five community workshops and open house meetings were held at locations throughout the city, along with meetings with the Interim Planning Commission and the Southside Task Force. These events were designed to gather diverse input on Billings' future growth and development.

The community workshops and open houses allowed members of the public to interact with the consultant team and City staff on a wide range of topics, including residential development, connectivity and transportation, parks and recreation, environmental considerations, commercial and industrial development, existing land use patterns, and related planning issues. Each workshop began with a brief presentation that explained the meeting format, shared key input themes gathered to date, and outlined the overall timeline for the Land Use Plan process.

Interactive engagement tools were a central component of the workshops. Five large maps were displayed at each meeting, allowing participants to provide location-specific feedback directly on different geographic areas of the city. Two visual preference boards gave attendees the opportunity to vote on preferred development types and building styles. A large community canvas poster provided space for open-ended comments across multiple topics, and comment cards allowed participants to respond to prompts about Billings and its future.

Educational materials were also provided to support informed input, including information on missing middle housing and land use placetypes, which are discussed further in Chapter 6 of this plan. Input gathered during Community Planning Week has been organized by engagement method, with common themes identified across meetings. Map-based feedback has been synthesized into a series of summary maps that illustrate what was heard during the week and help inform future land use recommendations.



1.5 COMMERCIAL AND INDUSTRIAL SUMMARY MAP

Mapping

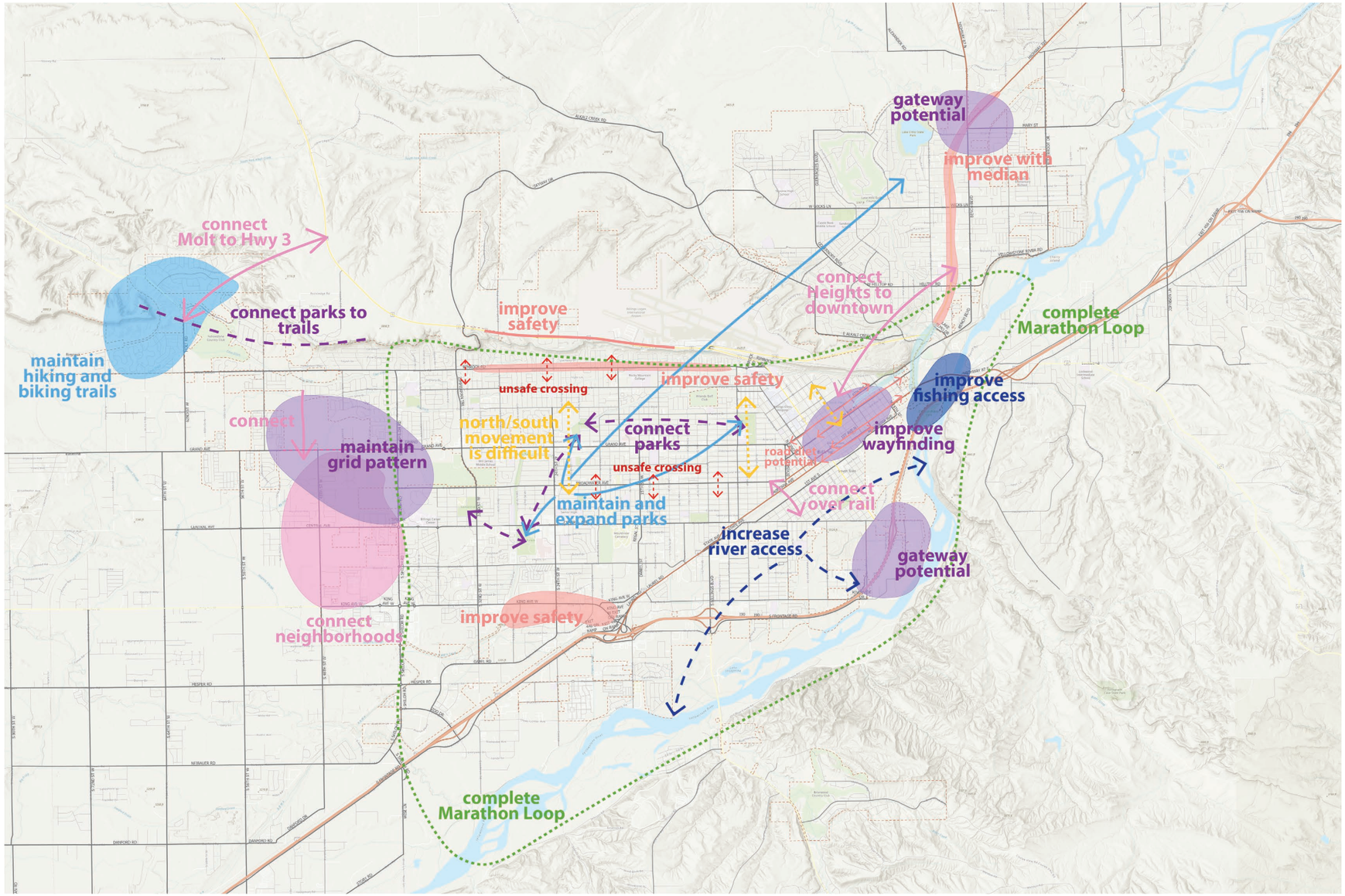
During Community Planning Week, participants provided location-specific feedback using interactive mapping exercises focused on four major topic areas. The maps summarize recurring patterns, opportunities, and concerns raised across multiple meetings and are intended to complement, not replace, the broader engagement takeaways. Together, they help illustrate how community priorities vary by location and inform future land use recommendations.

Commercial and Industrial

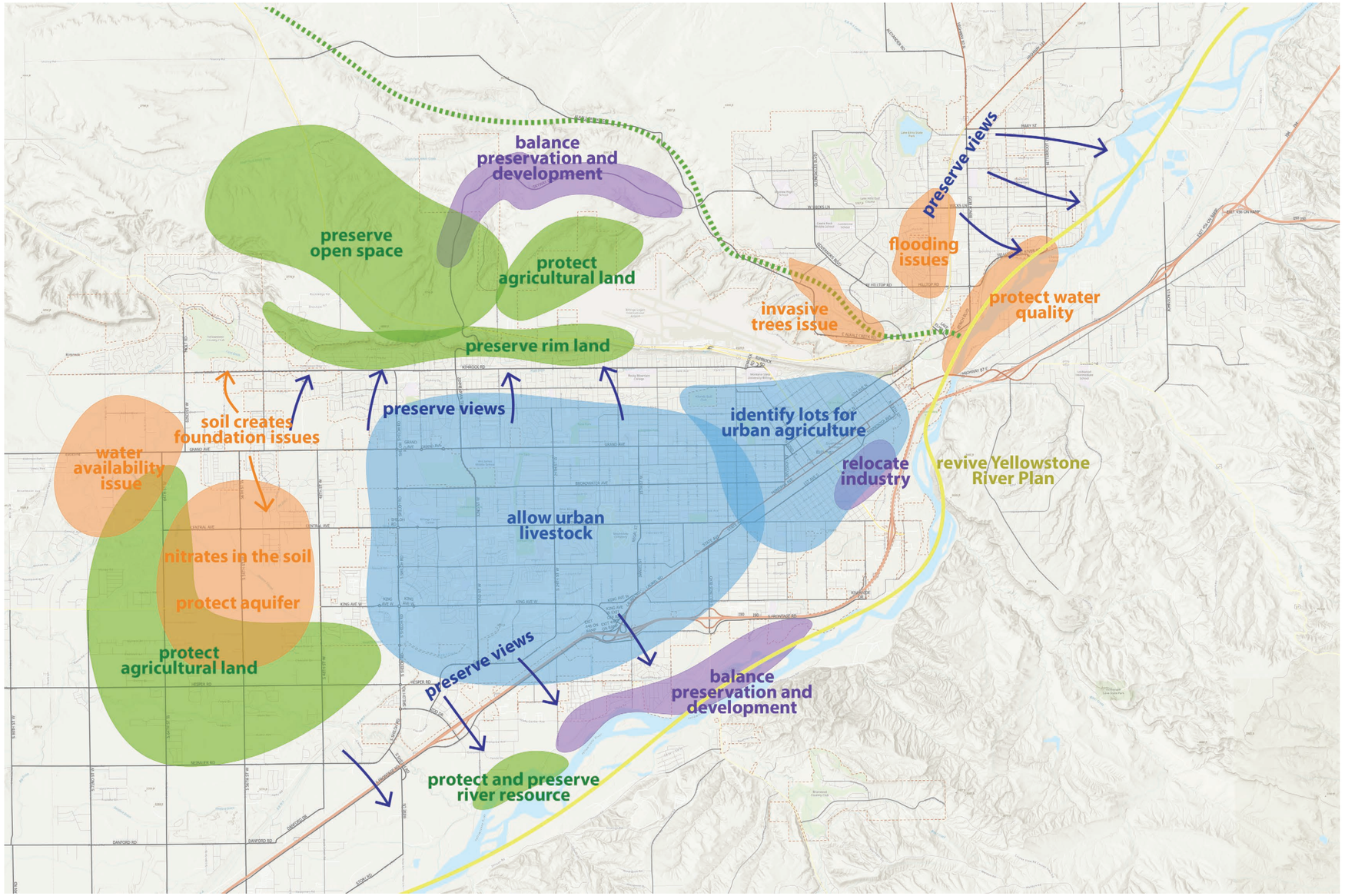
Input related to commercial and industrial areas emphasized the importance of intentional redevelopment, mixed-use potential, and strategic industrial location. Participants identified opportunities for reinvestment along key corridors and near existing infrastructure, while expressing concern about locating industrial uses near residential areas. There was strong support for focusing industrial development near highways and rail, encouraging mixed-use redevelopment in appropriate areas, and strengthening activity centers that support nearby neighborhoods.

Connectivity and Recreation

The connectivity and recreation map highlights community priorities related to mobility, safety, and access to parks and open space. Participants emphasized the need to improve walking and biking connections, address unsafe crossings, strengthen north-south connectivity, and better link neighborhoods to parks, trails, and the river. Completing regional trail loops, improving wayfinding, and expanding access to recreation areas were recurring themes, along with the need to integrate transportation improvements with land use decisions.



1.6 CONNECTIVITY AND RECREATION SUMMARY MAP



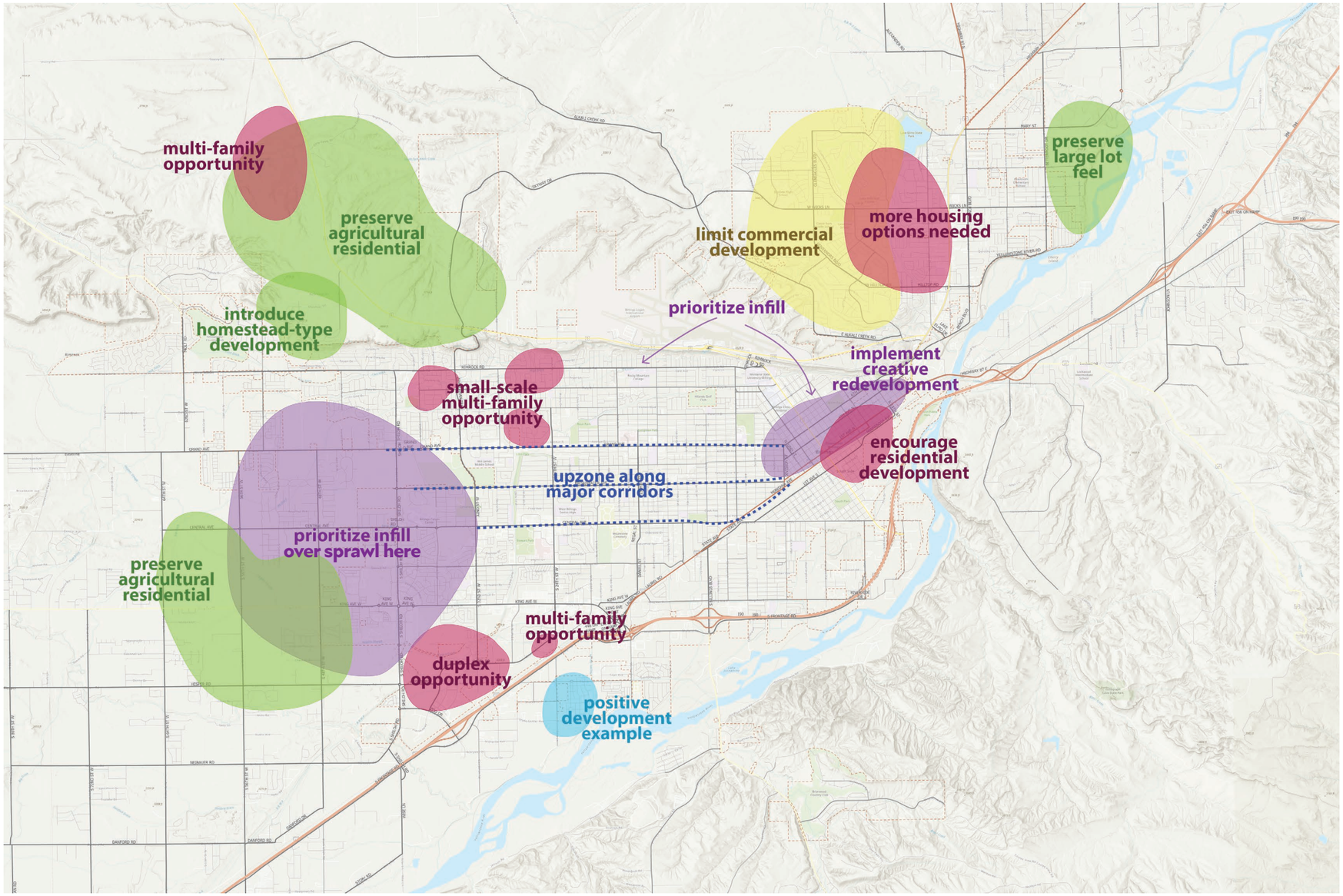
1.7 ENVIRONMENTAL SUMMARY MAP

Environmental

Environmental mapping input focused on protecting natural resources while balancing growth and development. Participants identified areas where agricultural land, open space, rim views, water quality, and river resources should be preserved. Concerns related to flooding, soil conditions, invasive species, and water availability were also noted. Overall, the input emphasized aligning future development with environmental capacity and long-term resource protection.

Residential

Residential mapping feedback highlighted a strong desire for housing choice and thoughtful neighborhood evolution. Participants identified areas where infill and redevelopment could support additional housing, including opportunities for small-scale multi-family and missing middle housing. At the same time, many emphasized preserving neighborhood character, large-lot patterns, and agricultural residential areas where appropriate. The input reflects a desire to balance new housing opportunities with context-sensitive design and neighborhood stability.



1.8 RESIDENTIAL SUMMARY MAP

Community Canvas

Input gathered from large Community Canvas posters at workshops and open houses captured community-wide perspectives on Billings' future growth and development. Participants consistently raised the need for a more coordinated and intentional approach to growth that aligns land use decisions with infrastructure capacity, public services, and long-term community priorities. The comments reflect a desire for clearer direction on how and where growth should occur to support livability, fiscal responsibility, and a strong sense of place.

Land use and transportation comments highlighted the importance of coordinating growth with infrastructure and mobility investments. Participants expressed interest in focusing higher-intensity development near transportation corridors, expanding transit service, and creating more walkable environments. There was strong support for diversified transportation options, including expanded bus service and long-term consideration of rail-based transit. At the same time, residents expressed concern about congestion on major corridors and emphasized the need for roadway design standards that can support growing subdivisions.

Community character, culture, and economic development themes focused on preserving and strengthening Billings' identity. Downtown and the Rims were consistently identified as defining features of the city, and participants expressed interest in reducing repetitive or siloed development patterns. Comments emphasized expanding arts, culture, and entertainment options, particularly activities for adults that are not centered on bars. There was also support for updating infill policies, encouraging reinvestment in existing areas, and limiting certain types of large-scale development that may not align with community values.

Housing comments reflected both urgency and diversity of opinion. Participants emphasized the need for housing abundance and affordability, while also calling for a wider range of housing types, including missing middle and mixed-use residential development. Some comments supported more compact and consolidated housing patterns to preserve natural areas, while others expressed preferences for specific housing forms. Overall, the input highlights a desire for intentional housing design that supports community interaction, shared spaces, and access to services.

Public services, parks, and schools were viewed as foundational to Billings' long-term success. Participants emphasized that growth should not outpace the City's ability to staff and maintain public services, infrastructure, and parks. There was strong support for equitable investment in recreation facilities, improved river access, and careful consideration of long-term maintenance costs. Education-related comments emphasized safe routes to school, stronger community support for schools, and the need to align school planning with broader housing and land use decisions. Collectively, the input underscores the importance of funding infrastructure and services proactively and planning growth at a pace the community can sustain.

1.9 EXAMPLE COMMUNITY CANVAS

Comment Cards

Comment cards left out during community open house and workshop meetings provided insight into residents' priorities for Billings' future. Overall, the comments reflect a desire for a more beautiful, equitable, and connected city that better reflects its natural setting and supports quality of life for all residents. While participants value Billings' small-town feel and access to nature, many noted that some corridors and neighborhoods lack greenery, thoughtful design, and attractive public spaces.

Several comments focused on concerns about uneven investment across the city, particularly in the Heights. Residents expressed frustration that the Heights contributes significantly to the local economy but has fewer services, amenities, and attractive development compared to other areas. There was a clear desire for more local shopping, entertainment, and community gathering spaces so residents can meet daily needs closer to home.

Mobility and access were recurring themes. Participants noted challenges navigating major streets on foot or by bike, limited transit access, and the difficulty of traveling across town efficiently. Improved public transportation, safer walking and biking infrastructure, and long-term planning for future transit options were viewed as essential to supporting growth and improving daily life.

Participants also emphasized the importance of downtown vitality, mixed-use development, and community character. Reducing vacant commercial spaces, investing in downtown and riverfront areas, expanding recreation opportunities, and supporting local businesses were seen as key to building community pride and retaining young people. Looking ahead, residents stressed that Billings will thrive if growth planning is inclusive, open to change, and focused on meeting the needs of those who live and work in the community.

1.10 COMMENT CARDS RECEIVED

VISUAL PREFERENCE BOARDS

Visual preference boards allowed participants to support or oppose development types in both commercial and residential categories. Visual preference board input was consolidated across meetings and is presented as follows:

COMMERCIAL DEVELOPMENT TYPE	YES!	NO!
Neighborhood shops	19	1
General business	5	11
Corridor commerce	4	10
Downtown core	15	0
Mixed-use areas	18	1
Light industrial	10	0
Heavy industrial	7	2

RESIDENTIAL DEVELOPMENT TYPE	YES!	NO!
Single-family detached housing	12	6
Accessory dwellings	7	3
Apartment or condominium communities	6	1
Cluster or conservation communities	6	5
Upper-floor housing	13	1
Townhomes or rowhouses	9	2
Manufactured home communities	5	6
Patio homes	5	2
Cottage court communities	8	1
Barndominiums	6	10
Senior housing or retirement communities	8	0
Small lot/home communities	7	1
Long-term stay RV communities	5	8
Missing middle housing infill development or communities	15	1

1.11 VISUAL PREFERENCE BOARD IN ACTION

CONVERSATIONS THROUGH THE PROCESS

Beyond the structured workshops and formal meetings led by the consultant team, Billings city staff orchestrated a comprehensive and grassroots engagement strategy to ensure a wide and diverse range of community members had the opportunity to contribute to the Billings 2045 Land Use Plan. This proactive, multi-pronged approach was designed to meet residents where they are, utilizing a blend of in-person events, broad media outreach, and digital platforms to gather feedback and raise awareness about the planning process.

A Multi-Faceted Outreach Strategy

City staff's efforts were characterized by a commitment to accessibility and broad visibility. The strategy encompassed a variety of methods to connect with a diverse cross-section of the Billings community, from families at local festivals to established community leaders and the public at large through a robust advertising campaign.

One of the core components of this strategy was a strong presence at popular community gatherings. Staff set up interactive "bean survey" booths at the Strawberry Festival in July 2025 and the Harvest Festival in October 2025, engaging over 400 residents in conversations about the city's future. This boots-on-the-ground approach extended to the distribution of flyers with QR codes linking to the community survey to nearly 200 businesses across the city, ensuring that information about the plan was visible in the places residents frequent daily.

To complement these in-person efforts, the city launched an extensive media and advertising campaign. This included:

- Broadcast Media: Numerous interviews and public service announcements were aired on local radio stations, including Yellowstone Public Radio and six stations under the Desert Broadcasting umbrella. Television interviews were conducted with Community 7 and KULR 8.
- Digital and Print Media: The city utilized press releases to 58 media contacts, secured coverage in the Billings Gazette, and maintained a significant online presence through boosted and organic posts on Facebook, Nextdoor, Instagram, and even Reddit. This digital push resulted in over 33,000 social media impressions.
- Public Advertising: A highly visible advertising campaign ran from late October through November 2025, featuring 13 billboards in strategic locations, static ads on three MET Transit buses, and informational displays on screens within City Hall.

Furthermore, staff actively engaged with established community groups and leaders. Presentations were made to six different neighborhood task forces,covering the Heights, West End, Pioneer Park, Rimrock, Midtown, and the Southside, as well as professional organizations such as the Billings Association of Realtors. These meetings provided a forum for deeper, more focused discussions with representatives who have a long-standing connection to their respective communities.

What We Heard

The feedback gathered through these diverse, staff-led initiatives provided a valuable snapshot of the community's priorities and concerns. The informal "bean surveys" at the Strawberry and Harvest Festivals, which collected responses from over 400 participants, revealed key insights into the public's vision for Billings.

At the Strawberry Festival, Public Safety and Affordable Housing emerged as the top two priorities for the city's future. When asked where new growth should be focused, the Heights was the most frequently cited area, followed by Downtown and Surrounding Neighborhoods.

These themes were echoed at the Harvest Festival, where Housing Cost was identified as the single biggest challenge facing Billings over the next 20 years. Other significant concerns included a lack of places to eat, shop, or find entertainment and the quality of schools. The table summarizes the top priorities (Strawberry Fest) and challenges (Harvest Fest) identified at the two festivals.

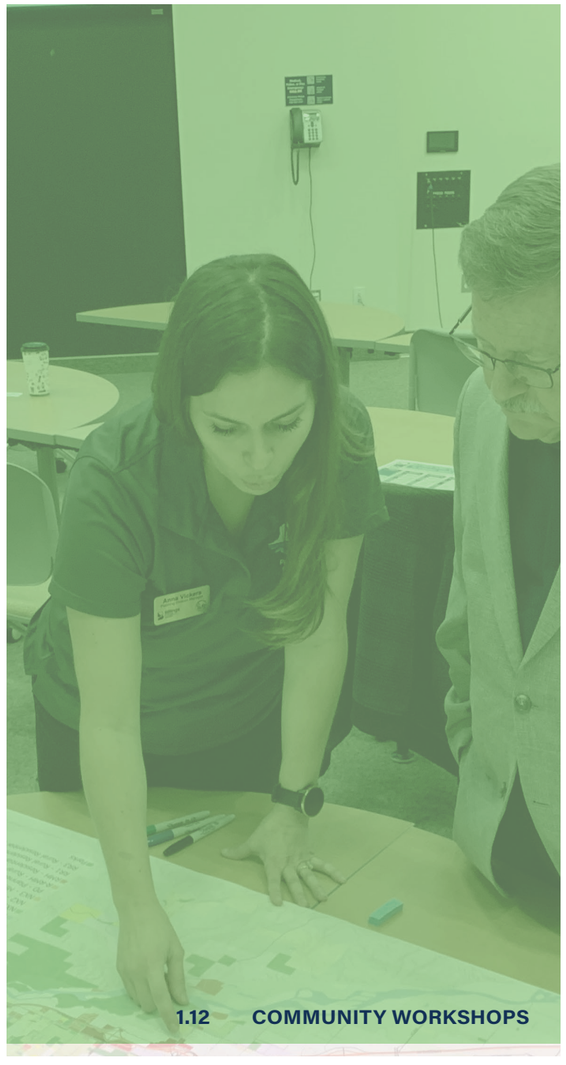
TOP PRIORITIES	%	BIGGEST CHALLENGES	%
Public Safety	38%	Housing Cost	26%
Affordable Housing	23%	Lack of Entertainment/ Shopping	12%
Environment	12%	School Quality	12%
Parks & Recreation	11%	Uncontrolled Growth	8%
Jobs & Economy	10%	Lack of Recreation Opportunities	8%

This continuous and varied dialogue, orchestrated by city staff, created a broad and inclusive platform for public participation. The insights gathered through these efforts have been instrumental in shaping the goals and strategies outlined in this plan, ensuring that it reflects the diverse voices and aspirations of the Billings community.

THE IMPACT OF INPUT

Public engagement shaped the foundation of this Land Use Plan. Through conversations, surveys, workshops, and mapping activities, residents and stakeholders shared how growth is affecting their daily lives and what they want Billings to become in the years ahead. While perspectives varied, a clear message emerged. The community is calling for growth that is thoughtful, coordinated, and aligned with the City's ability to support development with infrastructure, services, and housing, while also protecting the character, landscapes, and neighborhoods that define Billings.

Listening to the community is central to effective land use planning because growth decisions leave a lasting imprint on neighborhoods, public spaces, and public investment. Choices about the location and process of development shape transportation options, housing affordability, access to services, and long-term fiscal health. By grounding this plan in community input, the Land Use Plan reflects local values and lived experience alongside technical analysis. This approach helps ensure that future growth responds to community priorities while remaining realistic, equitable, and sustainable over time.



1.12 COMMUNITY WORKSHOPS

VISION STATEMENT AND PLAN THEMES

The Vision Statement and Plan Themes translate the engagement takeaways into a shared direction for the city's future. Across engagement activities, consistent priorities emerged, including aligning growth with infrastructure capacity, expanding housing choice, improving transportation and connectivity, protecting environmental resources, advancing equity, and strengthening community character. Together, the vision and themes articulate how Billings can grow in a way that supports quality of life, economic vitality, and long-term resilience.

Community input also included a strong place-based dimension that informs how these priorities apply across the city. Through mapping exercises and location-specific feedback, participants identified areas where growth is appropriate, where reinvestment should be encouraged, and where environmental features, infrastructure constraints, or neighborhood context warrant greater care. This input reinforces the importance of tailoring land use decisions to local conditions while remaining aligned with citywide goals.

This geographic input, combined with analysis of existing conditions and adopted policies, informs the Future Land Use Map presented later in this plan. Together, the Vision Statement, Plan Themes, and Future Land Use Map form an integrated framework that links community values with on-the-ground guidance, providing a clear and coherent path for managing growth that is intentional, fiscally responsible, and reflective of Billings' shared aspirations.

The vision statement and plan themes are as follows:

VISION STATEMENT & PLAN THEMES

MANAGE GROWTH BY SUPPORTING FISCAL SUSTAINABILITY, ALIGNING DEVELOPMENT WITH INFRASTRUCTURE, IMPROVING CONNECTIVITY, PROVIDING HOUSING OPPORTUNITY AND ADVANCING EQUITY, AND PROTECTING THE ENVIRONMENT AND REINFORCING COMMUNITY CHARACTER.

- Plan and manage growth to align fiscal sustainability with long-term community goals.
- Align land use decisions with the capacity and long-term sustainability of infrastructure, public services, and facilities.
- Support a transportation system that improves connectivity, safety, and access through multiple travel options.
- Expand housing options and affordability to support residents across incomes, ages, and household types.
- Promote equitable access to services and reinvestment in existing neighborhoods to support quality of life citywide.
- Protect natural resources and integrate parks, open space, and environmental considerations into growth decisions.
- Reinforce Billings' identity through context-sensitive development, downtown vitality, and distinctive neighborhoods.

BILLINGS 2045

BUILDING COMMUNITY

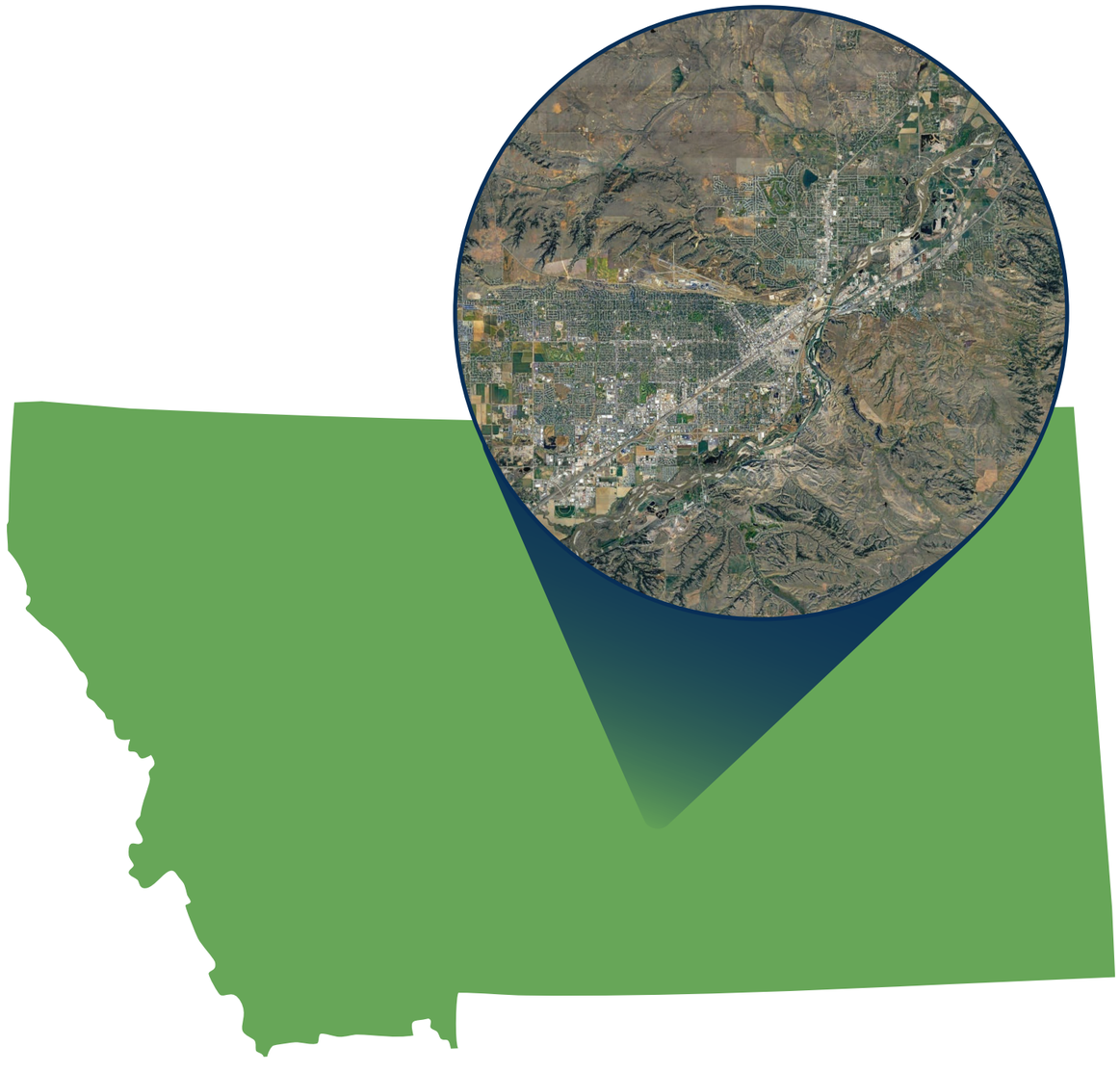
2

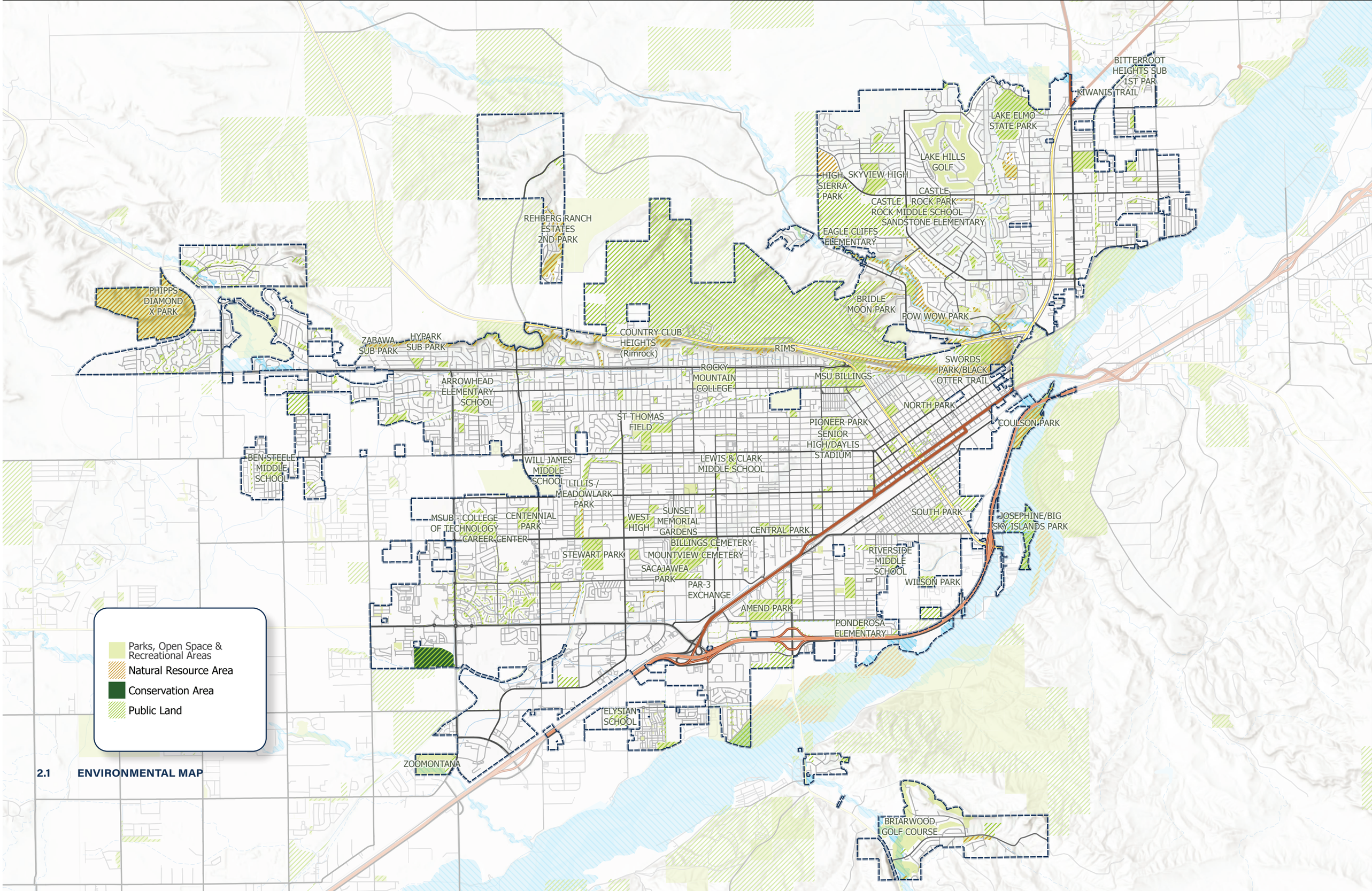
ENVIRONMENT

The natural environment of Billings, Montana, is a defining characteristic that has profoundly shaped its history, culture, and development. The city's unique location at the confluence of diverse geographic features creates a landscape of remarkable beauty and significant environmental considerations. This section provides a comprehensive overview of the natural environment of Billings, exploring its geography, water resources, climate, tree canopy, topography, and unique features, and how these elements influence the city's growth and development.

GEOGRAPHY

Billings is situated in the south-central portion of Montana, nestled within the Yellowstone River Valley. The city's geographic coordinates are approximately 45°48'N latitude and 108°33'W longitude, with an average elevation of about 3,126 feet above sea level. The city is framed by several scenic mountain ranges, creating a picturesque backdrop and a sense of enclosure. This setting, a blend of plains and mountain geographies, provides a diverse and rugged landscape that extends just beyond the city limits. The city itself encompasses a land area of approximately 45.4 square miles, within the larger 2,646 square miles of Yellowstone County.





2.1 ENVIRONMENTAL MAP

45.4

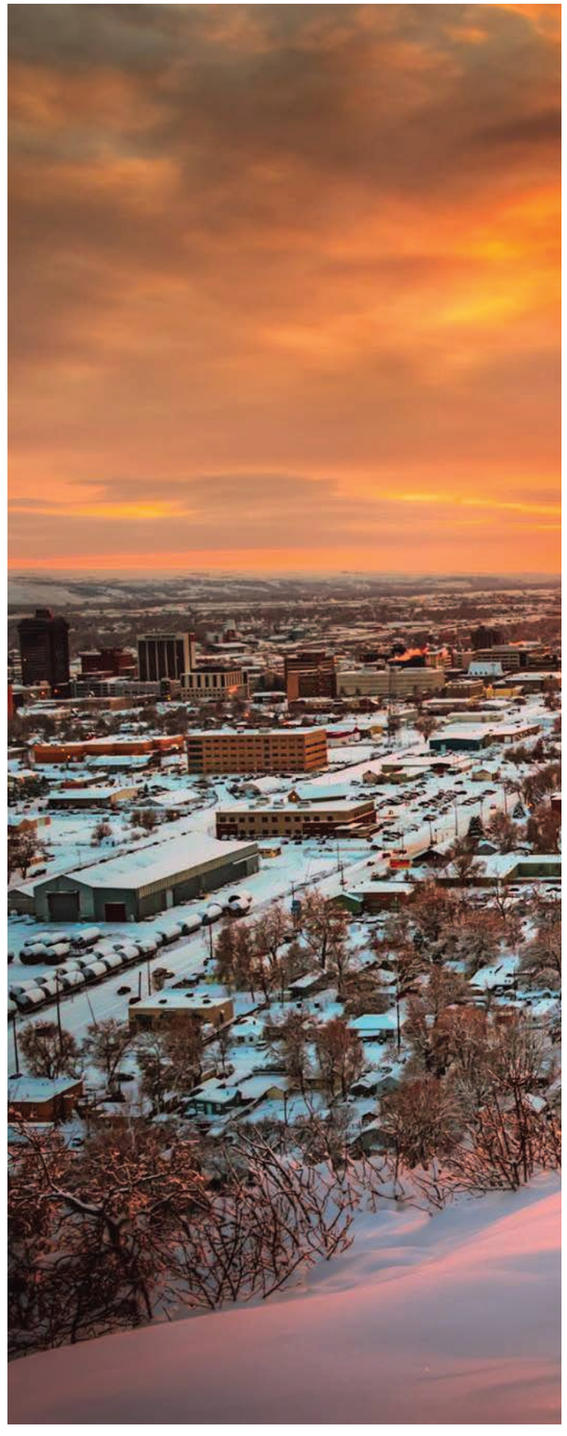
SQUARE MILES IN BILLINGS

$28M

ESTIMATED WORTH OF BILLINGS' TREES

67.6%

RATED "PRESERVING THE NATURAL ENVIRONMENT" AS "VERY IMPORTANT"



WATER RESOURCES

The Yellowstone River is the lifeblood of Billings, a dominant feature of the landscape and a critical resource for the community. As the longest free-flowing river in the contiguous United States, the Yellowstone River and its numerous tributaries have carved the valley and created the fertile lands that have supported settlement and agriculture for centuries. The river flows in a northeasterly direction through the valley, which varies in width from twelve miles to less than a quarter mile.

The river serves as the primary source of drinking water for Billings and other downstream communities. The city's water intake systems are located on the Yellowstone River, highlighting the importance of maintaining its quality and flow. The river also provides essential water for irrigation, supporting the agricultural sector that has long been a cornerstone of the regional economy.

The city's water resources also include a significant groundwater system. The area is characterized by unconsolidated, semi-confined alluvial aquifers, which are replenished by the Yellowstone River and other surface water sources. These aquifers are a vital source of water for various uses, but their shallow nature also makes them susceptible to contamination.

As shown in the provided map, a portion of the city lies within the 100-year floodplain of the Yellowstone River. This designation indicates a 1% chance of a major flood event in any given year. The historic flood of 2022, which registered between a 100-year and 500-year event, serves as a stark reminder of the potential for significant flooding and the importance of effective floodplain management.

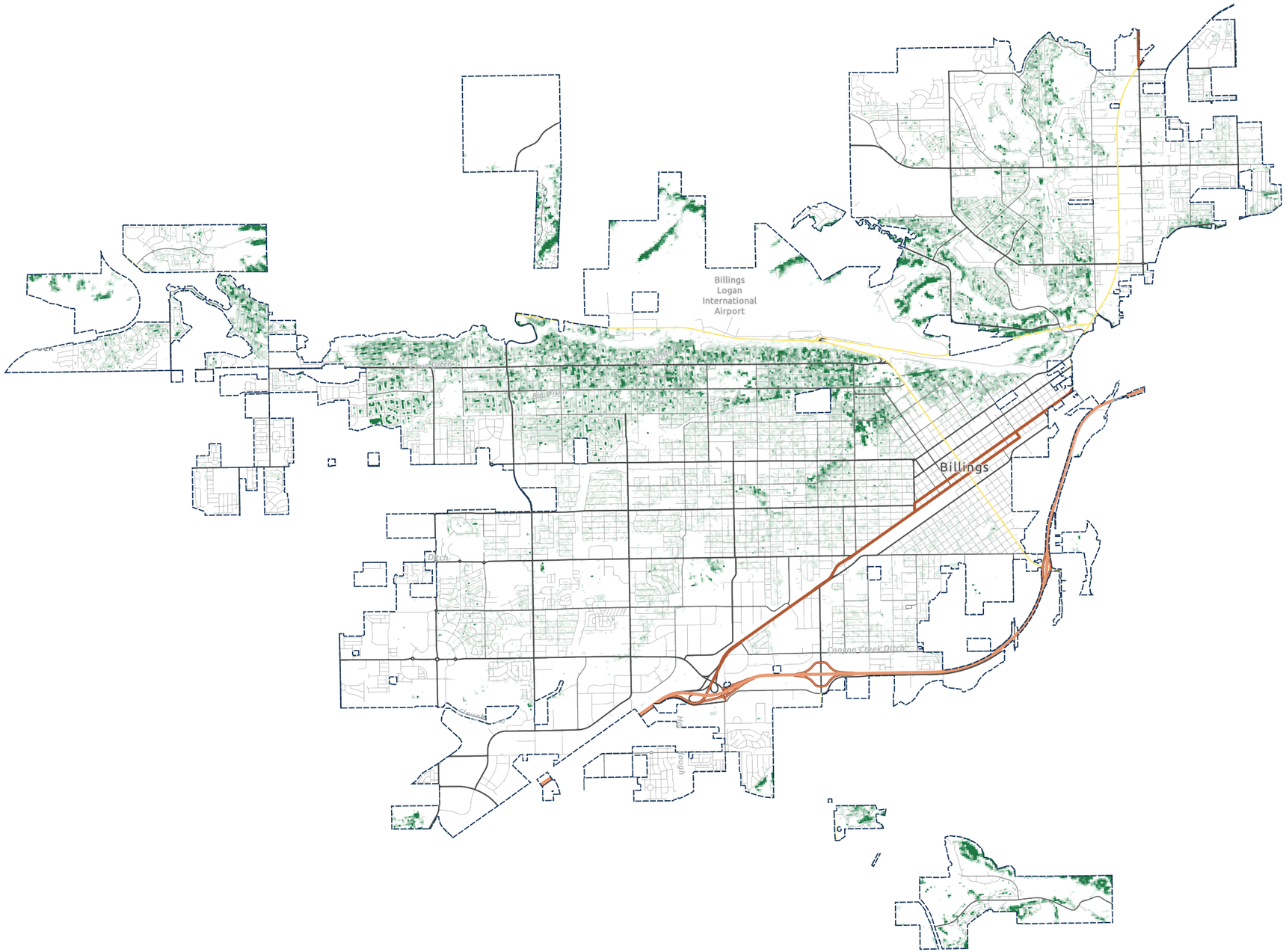
Stormwater management is another critical aspect of water resources in Billings. The city's storm sewer system is separate from its wastewater treatment system, meaning that stormwater runoff flows directly into the Yellowstone River without treatment. As the city develops and impervious surfaces like roads and parking lots increase, the volume and velocity of stormwater runoff also increase. This runoff can carry pollutants such as pesticides, fertilizers, oils, and sediment into the river, impacting water quality and aquatic habitats. The city's use of natural drainage features like ditches and drains helps to manage stormwater, but the direct discharge to the river remains a significant environmental concern.

GENERAL CLIMATIC CONDITIONS

Billings has a semi-arid climate, characterized by cold, dry winters and hot, sunny summers. Despite its northern latitude, the climate is surprisingly mild, a phenomenon largely attributed to the sheltering effect of the river valley and the frequent occurrence of Chinook winds. These warm, dry winds, which are common in the region, can rapidly melt snow cover and raise temperatures significantly in a short period.

The average annual temperature in Billings is 48°F, with a January average of 27°F and a July average of 73°F. Temperatures can fluctuate significantly, with summer highs often reaching into the 90s and winter lows dropping well below freezing. The highest recorded temperature in Billings was 112°F in 1901. The growing season is relatively short, with the last spring frost typically occurring around May 15th and the first fall frost at the end of September.

Average annual precipitation is approximately 13.66 inches, with the majority of moisture arriving in the spring and early summer. Snowfall averages around 54 inches per year, but the snow rarely accumulates to great depths due to the frequent thawing periods caused by Chinook winds.



TREE CANOPY

The urban forest and tree canopy of Billings are valuable assets that contribute significantly to the city's environmental quality and aesthetic appeal. The city has been recognized as a Tree City USA for over 30 years, a testament to its commitment to urban forestry.

As depicted in the provided Tree Canopy map, the distribution of trees is not uniform across the city. Denser canopy coverage is found in older, more established neighborhoods and parks, while newer developments on the urban fringe tend to have less tree cover. The City's Parks, Recreation and Public Lands contains a little under 13,000 trees with over 40 different species.. The most common tree species in the park's tree canopy are Ash (17%), Blue Spruce (16%), and Cottonwood (7%).

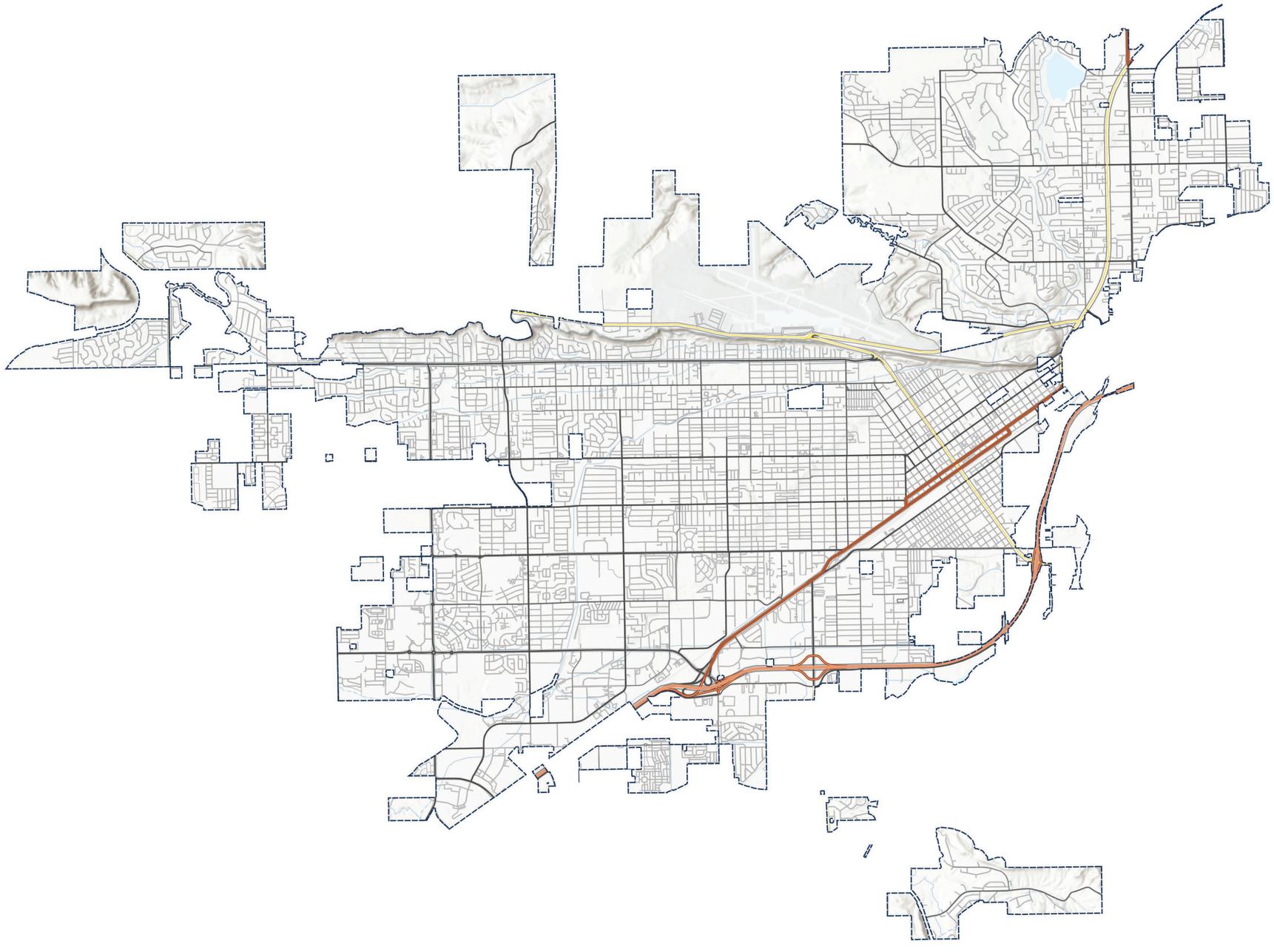
The urban forest provides numerous environmental benefits, including reducing stormwater runoff, improving air quality, and mitigating the urban heat island effect. The trees in Billings' parks are estimated to be worth nearly $28 million and provide over a million dollars in environmental benefits to residents each year.

Beyond the developed urban forest, the riparian corridor along the Yellowstone River supports a significant population of native cottonwood trees. These riparian forests are vital for bank stabilization, wildlife habitat, and water quality protection. However, they are also threatened by factors such as altered river flows and the spread of invasive species.

TOPOGRAPHY AND RELIEF

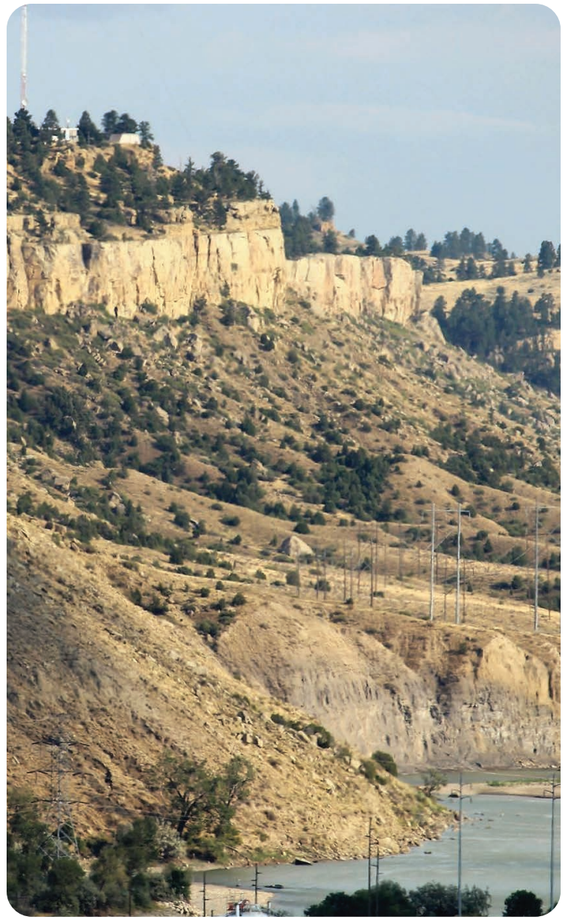
The topography of Billings is dominated by the Yellowstone River Valley and the dramatic sandstone cliffs known as the Rimrocks. The valley floor is relatively flat, with deep, well-drained loamy and silty clay soils that are ideal for agriculture.
Rising abruptly from the valley floor to the north and east of the city are the Rimrocks, a series of sandstone cliffs that reach heights of 300 to 500 feet. These cliffs are a defining landmark of Billings, offering panoramic views of the city and the surrounding landscape. The land above the Rimrocks consists of rolling hills with shallow to moderately deep sandy and clay loam soils. To the south of Billings, the terrain is characterized by rolling to moderately steep hills and high, flat tablelands.

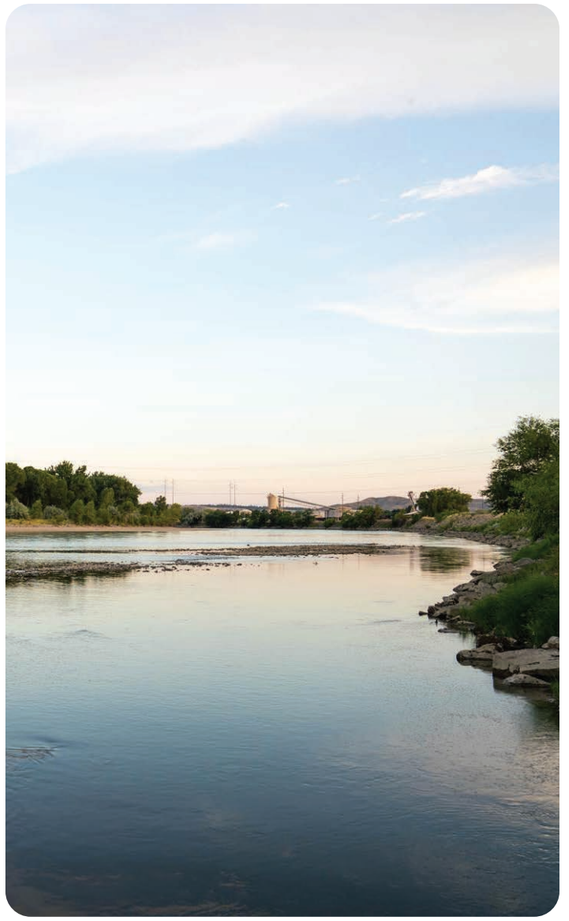
The geology of the area is as distinctive as its topography. The Rimrocks are part of the Eagle Sandstone formation, a sedimentary rock layer that is 70-80 million years old. This sandstone was deposited in a shallow sea that once covered the region during the Late Cretaceous period. The cliffs were subsequently carved and shaped by the erosive power of the Yellowstone River. The sandstone from the Rimrocks was historically used as a building material for many of the city's oldest structures.



DISTINCTIVE ENVIRONMENTAL FEATURES

Billings is home to several unique natural and cultural features that contribute to its distinct character.





THE RIMROCKS:

As previously mentioned, the Rimrocks are the city's most prominent natural landmark. They provide a stunning backdrop to the city and offer a wide range of recreational opportunities, including hiking, rock climbing, and biking. The publicly owned parks along the Rimrocks, such as Zimmerman Park and Swords Park, are popular destinations for residents and visitors alike.

PICTOGRAPH CAVE STATE PARK:

Located just east of Billings, this park is a significant archaeological and cultural site. The caves contain hundreds of pictographs, or rock paintings, created by prehistoric hunters over a period of thousands of years. The site provides a glimpse into the lives of the earliest inhabitants of the region and holds deep spiritual significance for many Native American tribes.

YELLOWSTONE RIVER:

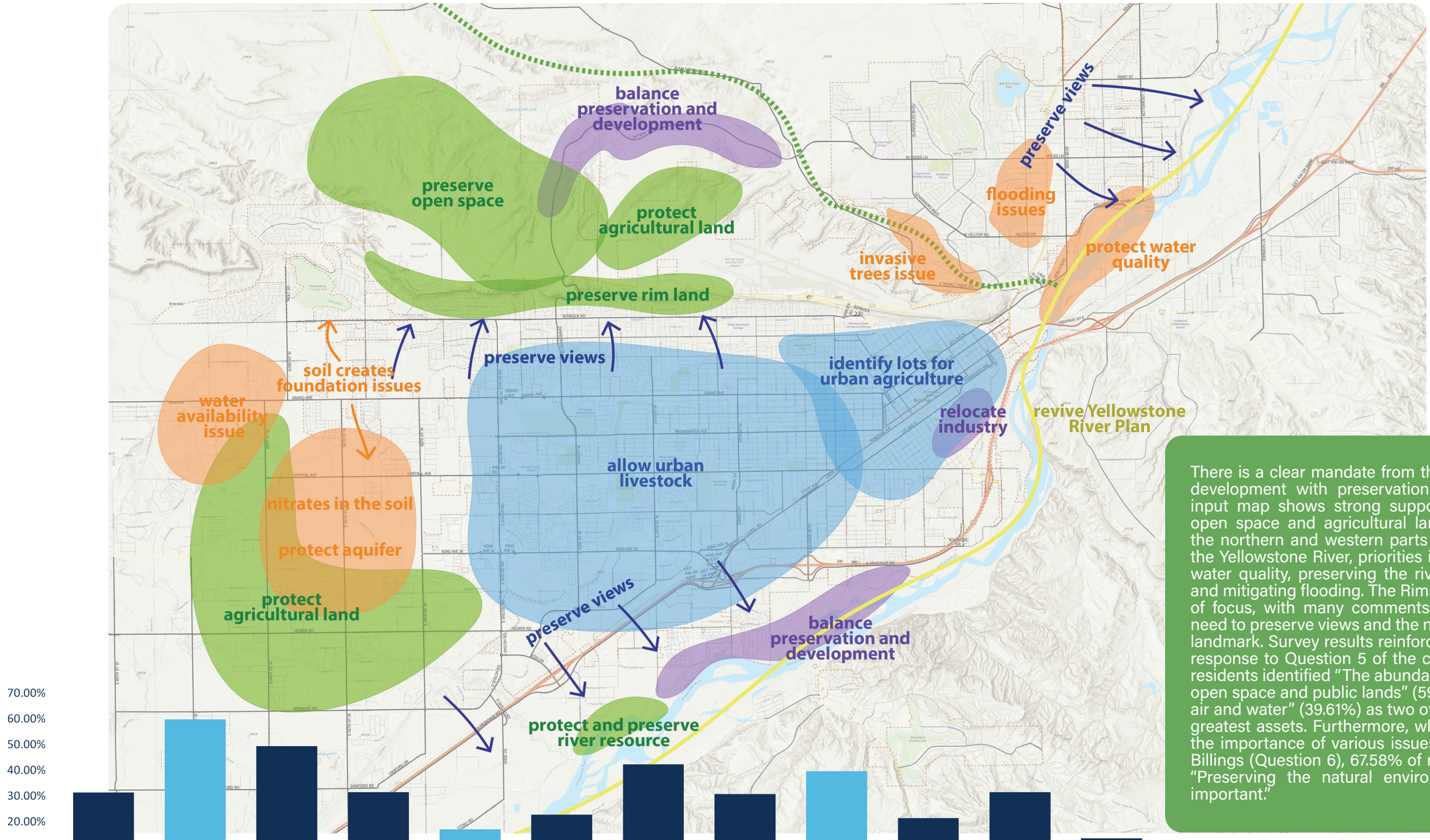
The Yellowstone River itself is a unique feature, not only for its ecological and economic importance but also for its recreational and scenic value. The river provides opportunities for fishing, boating, and wildlife viewing, and its corridor is a vital habitat for a diverse array of plant and animal species.

LOOKING FORWARD

The natural environment of Billings is a complex and dynamic system that has played a central role in the city's development. The interplay of geography, water, climate, and topography has created a landscape of both opportunity and challenge. As Billings continues to grow, it is essential that the community's deep appreciation for its natural assets, as expressed in community surveys, is translated into policies and practices that ensure the long-term health and resilience of the natural environment. The protection of the Yellowstone River, the preservation of the Rimrocks, and the enhancement of the urban tree canopy are all critical to maintaining the quality of life that makes Billings a unique and desirable place to live.

CORE ISSUES AND OPPORTUNITIES

Public input gathered through the comprehensive planning process reveals a community that deeply values the natural environment of Billings and sees a strong connection between its protection and the city's future development. Residents consistently highlighted the importance of the Yellowstone River, the iconic Rimrocks, agricultural lands, and open spaces as defining assets. Feedback from community surveys, engagement workshops, and mapping exercises indicates a desire for growth that respects these natural features while addressing the pressing need for diverse and affordable housing. This section synthesizes that public input, connecting it to the existing environmental conditions in Billings and the overarching themes of the Plan to offer a forward looking vision for the environment over the next 20 years.



2.2 SURVEY Q5: WHAT DO YOU CONSIDER TO BE THE TOP FIVE GREATEST ASSETS OF BILLINGS?

There is a clear mandate from the public: balance development with preservation. The community input map shows strong support for preserving open space and agricultural land, particularly in the northern and western parts of the city. Along the Yellowstone River, priorities include protecting water quality, preserving the river as a resource, and mitigating flooding. The Rims are another area of focus, with many comments emphasizing the need to preserve views and the natural state of this landmark. Survey results reinforce these values. In response to Question 5 of the community survey, residents identified "The abundance and access to open space and public lands" (59.79%) and "Clean air and water" (39.61%) as two of the city's top five greatest assets. Furthermore, when asked to rank the importance of various issues for the future of Billings (Question 6), 67.58% of respondents rated "Preserving the natural environment" as "Very important."

THE YELLOWSTONE RIVER

The Yellowstone River is consistently identified as one of Billings' most significant natural assets. Public input from the community input map emphasizes the need to protect and preserve the river as a resource, protect water quality, and revive the Yellowstone River Plan. The map also highlights concerns about flooding issues in areas adjacent to the river. These sentiments are echoed in additional engagement where one mural board commenter called for "More river use."

THE RIMROCKS

The Rimrocks are another iconic natural feature that the community holds in high regard. The community input map is clear in its call to preserve rim land and to preserve the viewsheds from and of the Rims. Plan engagement also identified the Rims as iconic to Billings. Future development near the Rims should be carefully managed to protect their scenic and natural character.

AGRICULTURAL LAND AND OPEN SPACE

The preservation of agricultural land and open space is a major priority for the residents of Billings. The community input map shows large areas that the community hopes to preserve as open space and agricultural land, particularly to the north and west of the city. The map also shows a desire to balance preservation and development in these areas. Engagement also revealed a desire for "Conservation in zoning (open space/green space in master site plans)."

Survey results further emphasize this point. In response to Question 11, one respondent expressed concern about "Continued sprawl, eating up farmland." Another noted, "Stop turning the valley's farmland into houses." The existing conditions narrative highlights the value of the valley's fertile soils for agriculture and notes that newer developments on the urban fringe have less tree canopy.

URBAN AGRICULTURE AND INFILL

In addition to preserving existing agricultural lands, there is also a notable interest in promoting agriculture within the city. The community input map identifies a desire to identify lots for urban agriculture and livestock in the central part of the city. This interest in urban agriculture is closely tied to the strong support for infill development. As noted in the residential preference board from the engagement workshops, "Missing middle housing infill development or communities" received the most support of any housing type. This suggests that the community sees an opportunity to create more compact, complete neighborhoods that incorporate local food production.

ACHIEVING PLAN THEMES

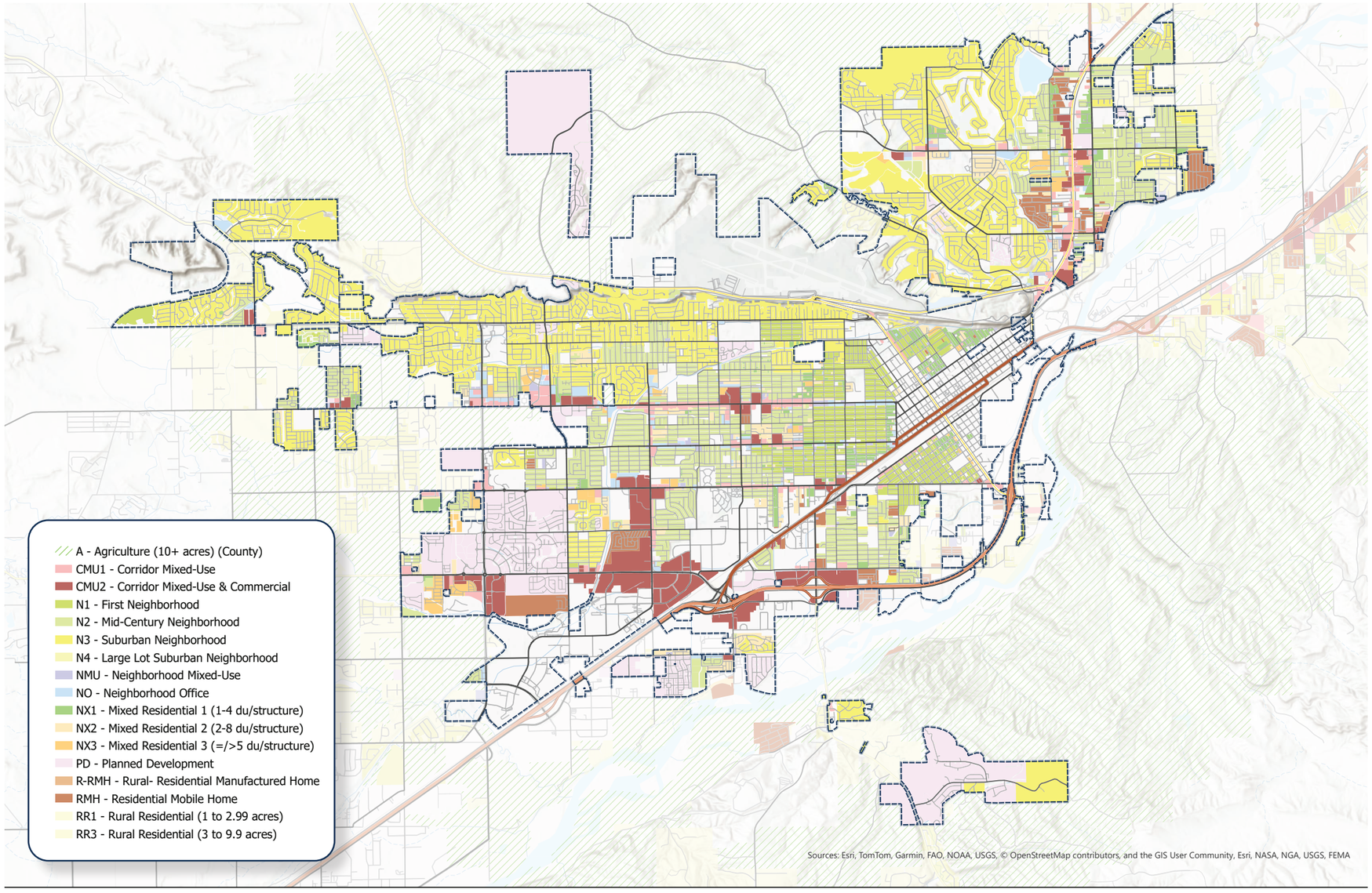
Public input on the environment articulates a clear and consistent vision for Billings' future, one that directly shapes and reinforces the Plan Themes. Residents' strong desire to protect the Yellowstone River, the Rims, agricultural lands, and open space reflects a shared commitment to safeguarding natural resources and thoughtfully integrating parks, open space, and environmental considerations into decisions about growth. At the same time, the community's preference for infill development and urban agriculture over outward expansion underscores the importance of managing growth in a way that supports fiscal sustainability and long-term community goals by making more efficient use of existing infrastructure.

Encouraging a broader range of housing options within the city's core aligns with this approach, helping to expand housing choice and affordability while promoting equitable access to services and reinvestment in established neighborhoods. Preserving iconic features such as the Rims and embracing context-sensitive infill further strengthen Billings' identity, supporting downtown vitality and the continued evolution of distinctive neighborhoods.

Looking ahead over the next 20 years, this vision suggests a coordinated and integrated path forward. A comprehensive green infrastructure framework can help identify and prioritize the protection of key environmental assets, including the Yellowstone River corridor, the Rims, agricultural lands, and open spaces, while aligning land use decisions with long-term conservation goals. Development standards can continue to evolve to ensure that new projects minimize environmental impacts through thoughtful stormwater management, tree preservation, and careful consideration of sensitive areas such as steep slopes.

At the same time, sustained emphasis on infill and redevelopment can help accommodate growth within the city's existing footprint. Zoning updates that allow for a wider diversity of housing types, paired with incentives to reuse underutilized land, can support vibrant, complete neighborhoods. Supporting urban agriculture, through clear and streamlined processes for community gardens and compatible small-scale food production, can further enhance local food security and contribute to a more resilient urban environment.

By advancing these interconnected strategies, Billings can welcome new growth while preserving the natural landscapes and community character that residents value. In doing so, the city can strengthen its sustainability and resilience, ensuring that future generations continue to experience the distinctive setting and high quality of life that define Billings today.



2.3 CURRENT RESIDENTIAL ZONING

HOUSING

A primary challenge facing Billings is a growing housing crisis. Between 2018 and 2023, the median home sale price in the city rose by over 50%. This rapid appreciation has far outpaced income growth, creating a significant affordability gap. The number of attainable homes has also decreased in the same period. Approximately 800 residential units are constructed annually, based on permitting data provided by the City. However, demand for housing has far outpaced the number of units being built, resulting in a cumulative shortage of nearly 10,000 residential units as estimated by the Billings Association of REALTORS®. With the projected need for 26,200 units by 2045, the City must account for the existing deficit as well as an additional average of 1,310 units per year to accommodate anticipated population growth. Assuming the City's permitting capacity remains the same, it will take until until 2040 to meet the projected housing need. While this appears to support the theory that if the City continues to grow in the same manner it is currently, it can account for the housing need within the set timeframe; however, we know other factors are at play. Growing out and utilizing land for detached dwellings on significant acreage is neither physically or fiscally sustainable. It is also not an affordable product for all residents who live here. This lack of attainable housing directly impacts the city's economic competitiveness, as local employers struggle to recruit and retain a workforce that can afford to live in the community they serve.

Concurrent with the housing shortage are the challenges of managing physical growth. Much of the city's recent expansion has occurred on the West End, leading to concerns about urban sprawl, the loss of productive agricultural land, and the mounting cost of extending and maintaining infrastructure. This pattern of development strains municipal budgets and can lead to inefficiencies in the delivery of public services. The need to continue to revitalize the downtown core and promote more compact, mixed-use development is a recurring theme in community discussions and a key focus of this planning effort.

The housing crisis in Billings is multifaceted, characterized by a shortage of housing at all price points, a growing affordability gap, and development patterns that are fiscally and environmentally unsustainable. A detailed analysis of the city's housing stock reveals a lack of diversity and an aging inventory, both of which contribute to the current challenges.

7,894

TOTAL MARKET-RATE UNITS

2,444

TOTAL MARKET-RATE UNITS BUILT SINCE 2015

7.7%

MARKET-RATE VACANCY RATE

EXISTING CONDITIONS

HOUSING TENURE, OCCUPANCY, AND TYPE

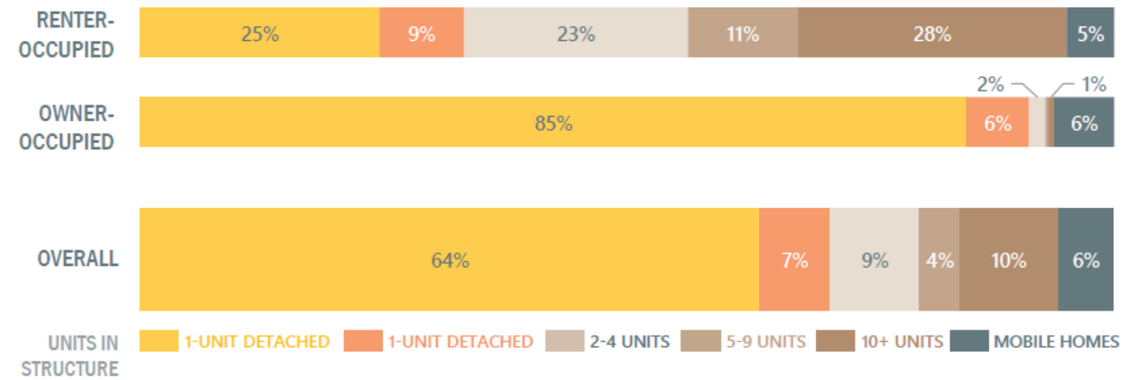
As of 2023, Billings has approximately 53,540 housing units. The majority of these units (61%) are owner-occupied, while 33% are renter-occupied and 6% are vacant. This figure includes 290 units that are sold/rented but not yet occupied, and 310 units occupied seasonally. There are 850 vacant units available for rent and 290 units for sale, per the American Community Survey. The 6% vacancy rate indicates a healthy housing market. This high rate of owner-occupancy reflects a community of stable households, but it also masks a significant disparity in housing options available to renters.

The city's housing stock is dominated by single-family homes, which account for 71% of all units (64% detached and 7% attached). In contrast, only 23% of housing units are in multifamily structures (2+ units). This composition highlights a lack of housing diversity, particularly for renters. While 85% of owner-occupied units are single-family detached homes, 62% of renter-occupied units are in multifamily structures. This indicates that renters have far fewer housing choices than owners, and are largely limited to apartments.

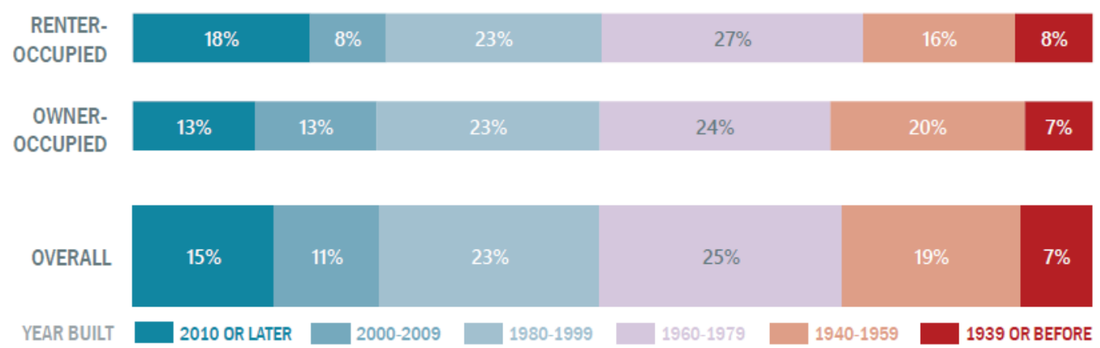
BUILDING AGE

The city's housing stock is also aging. Over a quarter of all housing units were built before 1960, and only 13% of owner-occupied units and 18% of rental units have been built since 2010. This suggests that much of the city's housing may be in need of repair or renovation, and that new construction has not kept pace with demand.

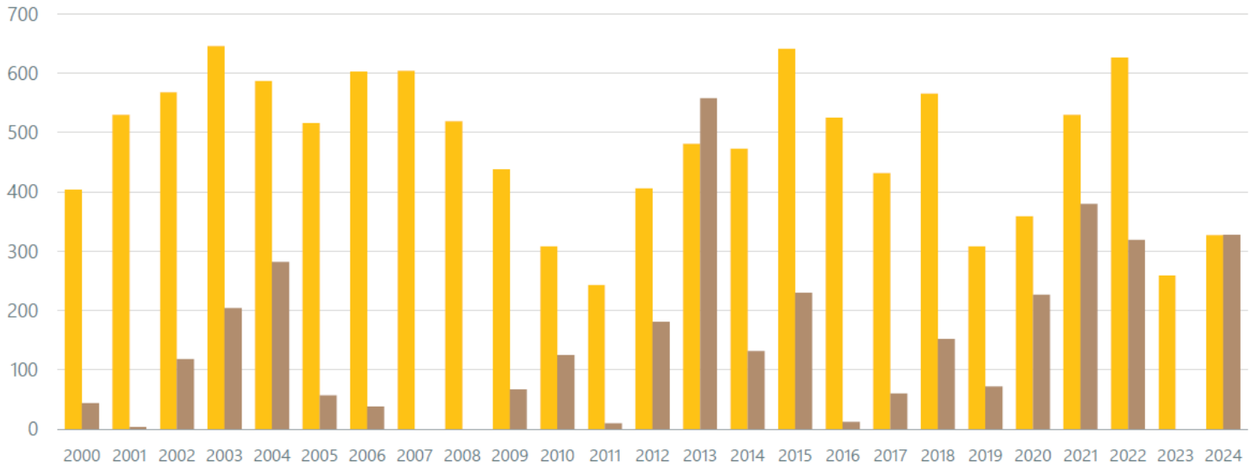
2.4 SHARE OF BILLINGS HOUSING UNITS BY TENURE AND UNITS IN STRUCTURE, 2023



2.5 SHARE OF BILLINGS HOUSING UNITS BY TENURE AND YEAR BUILT, 2023



2.6 BILLINGS RESIDENTIAL UNITS PERMITTED, 2000-2024



Source: Building Permits Survey, SB Friedman, U.S. Census Bureau

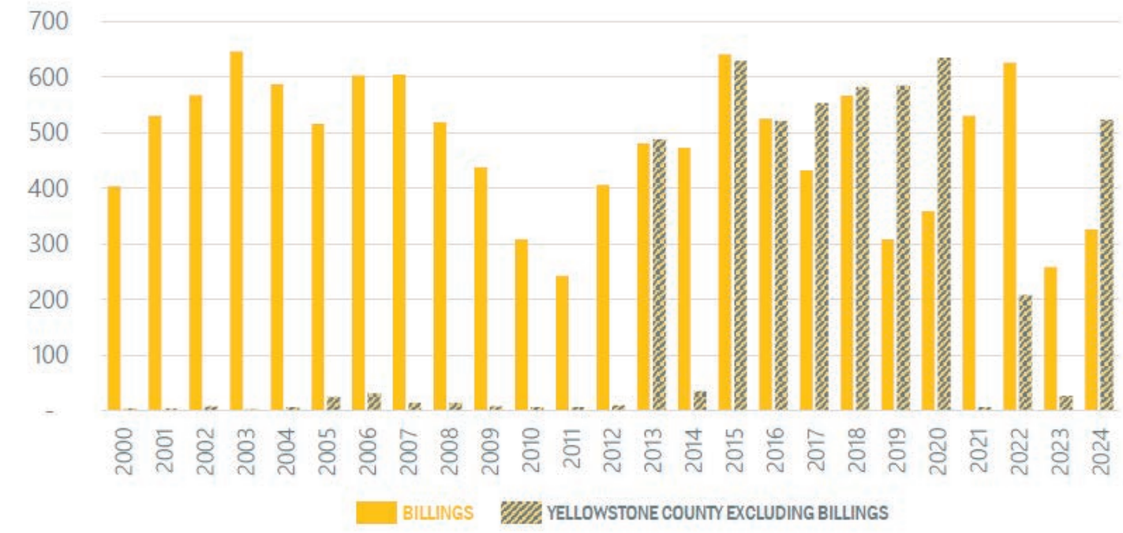
TOTAL UNITS PERMITTED

	SINGLE-FAMILY	MULTIFAMILY
2000-2004	2,735	652
2005-2009	2,680	162
2010-2014	1,911	1,006
2015-2019	2,472	526
2020-2024	2,101	1,254

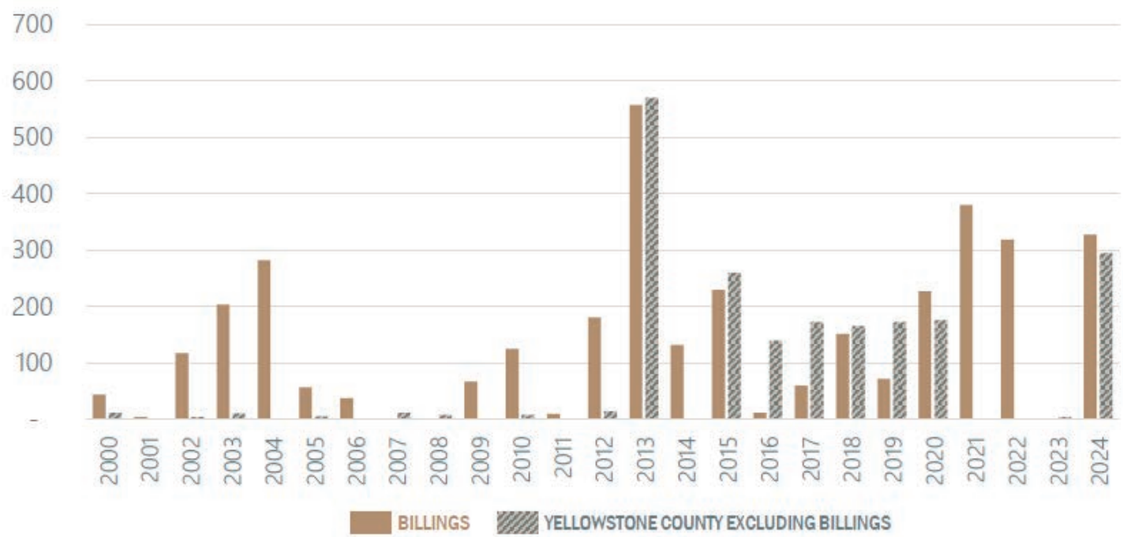
RECENT RESIDENTIAL BUILDING

Since 2015, approximately 7,800 residential units have been permitted in Billings. Of the residential housing units permitted, 43% have been single-family homes, 15% have been two-family homes, 10% have been townhomes and 32% have been multifamily homes. The mix of new housing has shifted towards denser options, while total housing production has also grown. From 2015 to 2020, 328 single-family homes and 299 homes in two-family, townhome, and multifamily buildings were permitted annually, on average. Between 2021 and 2025, the average number of single-family homes permitted annually fell to 271, while the average annual number of homes in other typologies increased to 537. Per City data, as of February 2026 subdivision applications have been submitted for over 500 additional residential units

2.7 SINGLE FAMILY UNITS PERMITTED, 2000-2024



2.8 MULTI FAMILY UNITS PERMITTED, 2000-2024



AFFORDABILITY

The most pressing housing challenge facing Billings is affordability. The median home sale price has increased by over $163,000 since 2015, a 75% increase. This rapid appreciation, particularly between 2020 and 2024, has far outpaced wage growth, making it increasingly difficult for residents to afford to buy a home. The market analysis reveals that four of the five top occupations in Billings do not provide enough income to buy a median-priced home.

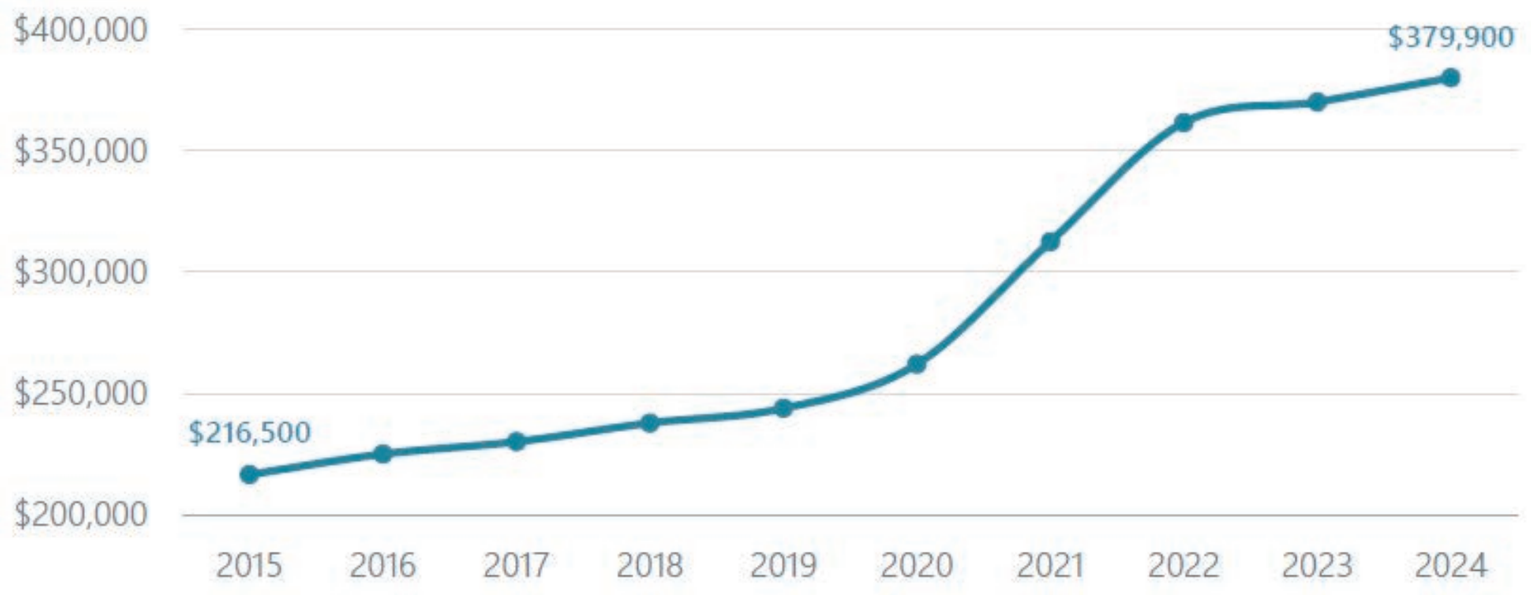
Residential Sale Trends

In 2015, the median home sales price in Billings was $216,500. The median price increased to $379,900 by 2024 (75% growth since 2015). Most of the recent increase in median home sales price occurred between 2020 and 2024. The median home sales price grew at a compound annual growth rate (CAGR) of 3.9% from 2015 to 2020. From 2020 to 2024, the median price grew at a higher rate of 9.7%. Over the entire period, the median price increased at a CAGR of 6.4%.

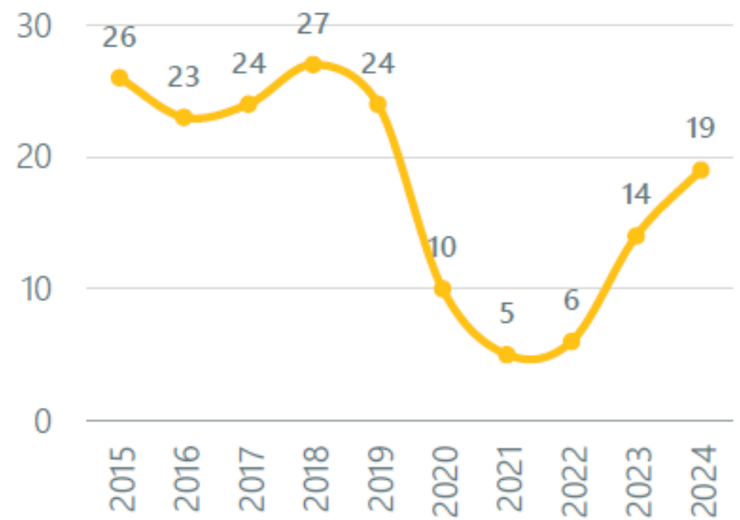
The median number of days on market for residential property in Billings has varied over the last decade. Between 2015 to 2019, the median number of days on market for residential property ranged from 23 to 27 days. Between 2020 and 2024, the median number of days on the market ranged from 5 to 19 days. The shorter time on market coincided with sharp increases in median sales prices.

From 2016 to 2020, the number of sales closed increased each year, reaching a high of 2,733 in 2020. From 2020 to 2023, the number of sales closed decreased each year, reaching 1,953 in 2023. In 2024, the number of sales closed increased to 1,979.

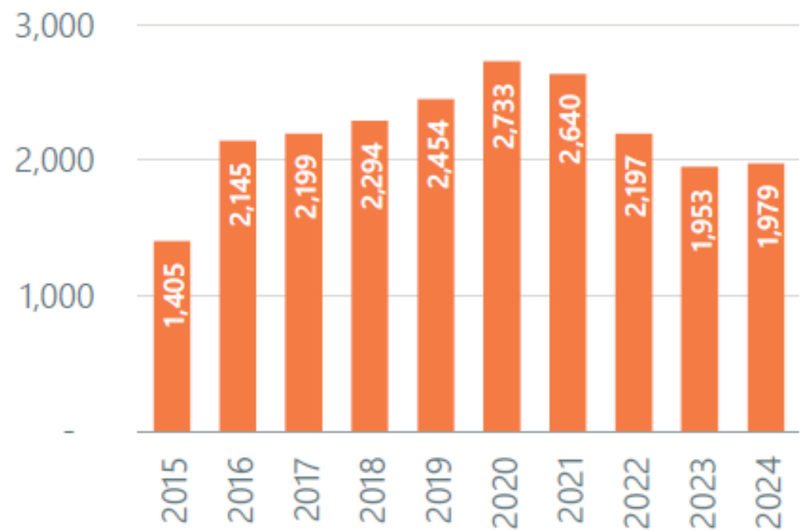
2.9 BILLINGS MEDIAN RESIDENTIAL SALES PRICE, 2015-2024



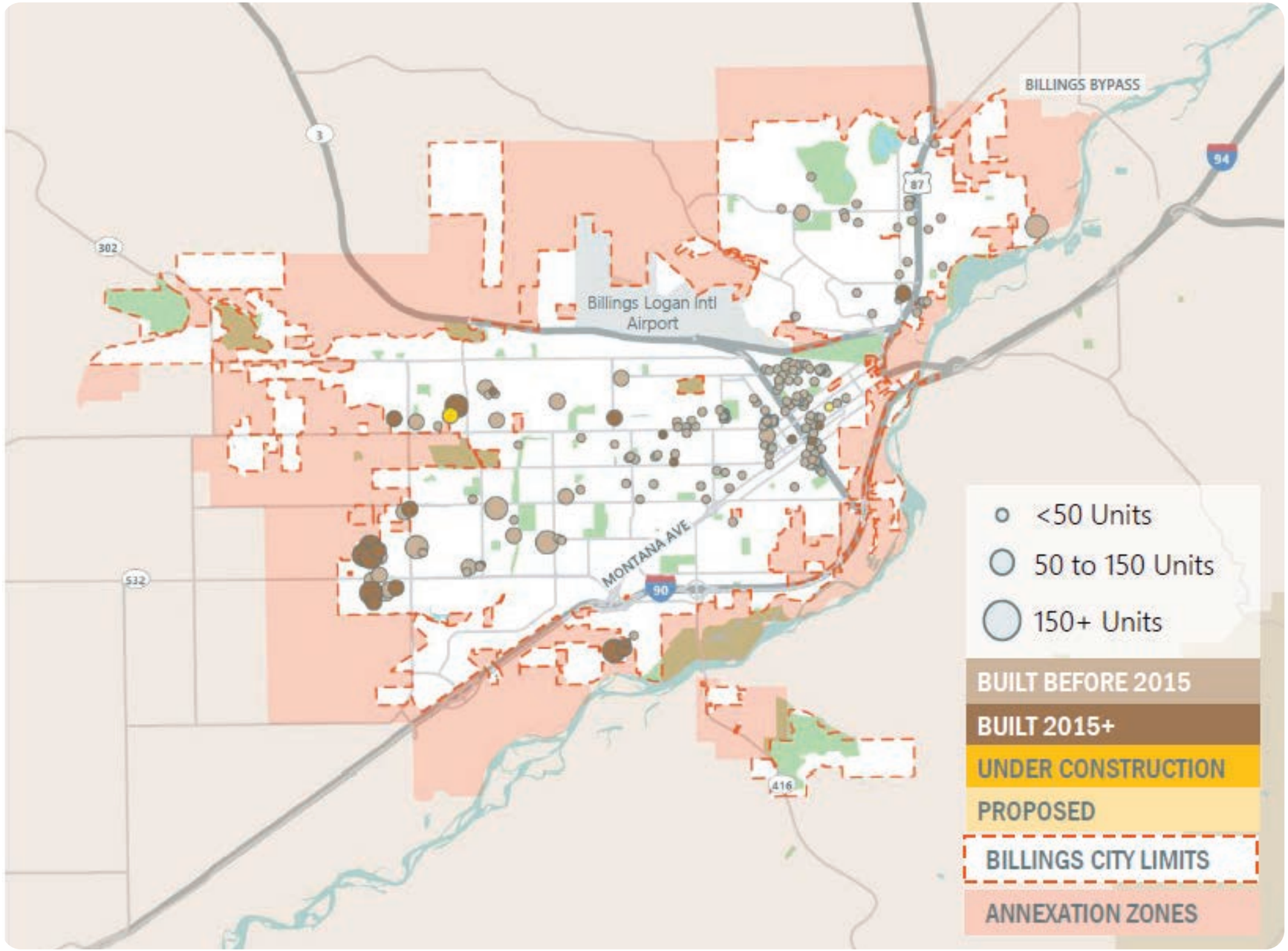
2.10 MEDIAN DAYS ON MARKET



2.11 RESIDENTIAL SALES CLOSED



2.12 MARKET-RATE MULTI FAMILY INVENTORY IN BILLINGS



Multifamily Market Rate Supply

Billings has 7,894 market-rate multifamily rental units (Co-Star). An additional 60 units are located in annexation zones. Market-rate multifamily rents average $1.57 per square foot (SF) and the overall vacancy rate is 7.7%, which indicates a healthy market; per Cushman & Wakefield, the U.S. average is 9.0%. Market-rate units are distributed throughout Billings, with a large concentration of older, smaller developments near the downtown.

Since 2015, 23 market-rate multifamily developments have been built, adding 2,444 units total, or 31% of Billings' total market-rate multifamily units. Newer market-rate developments tend to have more units and are located toward the edges of the city. Market-rate multifamily developments built before 2015 have an average of 29 units compared to those built since 2015, which have an average of 100 units. Per CoStar, there are 139 units currently under construction (one project) and 16 additional units proposed (one project) in Billings.

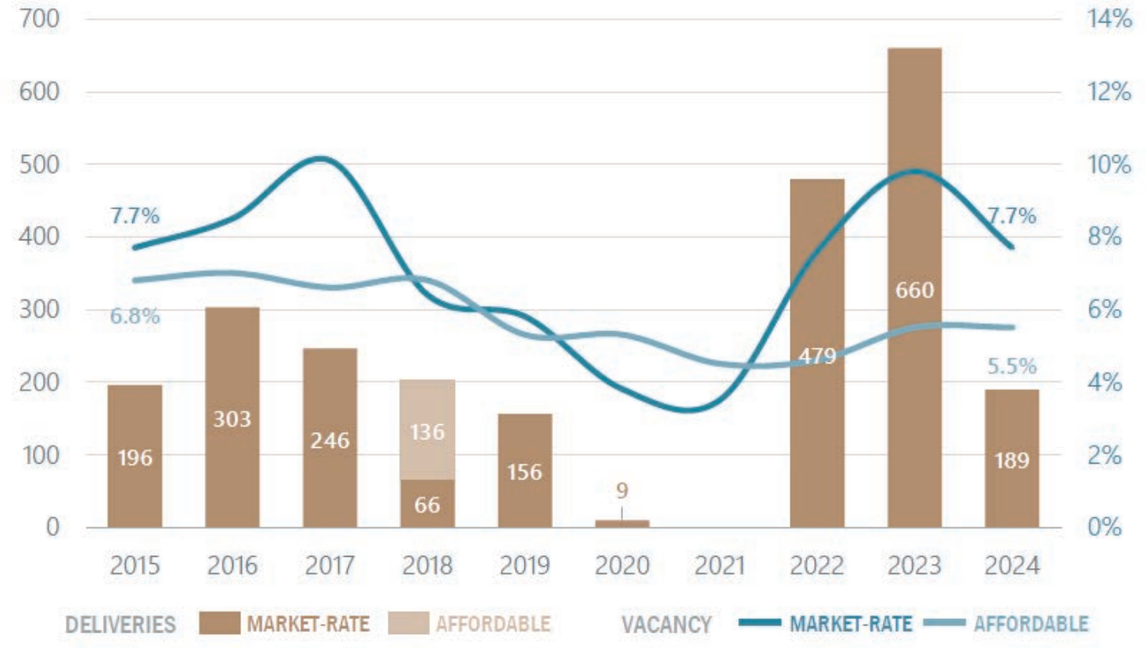
Multifamily Performance Trends

Approximately 2,440 multifamily rental units have been built in Billings since 2015. Of these units, 2,304 are market-rate and 136 are affordable. All the affordable units were delivered in 2018, whereas the market-rate unit deliveries were distributed throughout the period. After the delivery of 549 market-rate units in 2016 and 2017, the market-rate multifamily vacancy rate reached 10.1% in 2017. Once deliveries slowed over the next couple years, this vacancy decreased, eventually reaching a low of 3.5% in 2021. In 2022 and 2023, 1,139 market-rate units were delivered, resulting in vacancy rising to 9.8%. As of 2024, market-rate vacancy decreased to 7.7%. The affordable multifamily vacancy rate remained between 4.5% and 7.0% from 2015 to 2024.

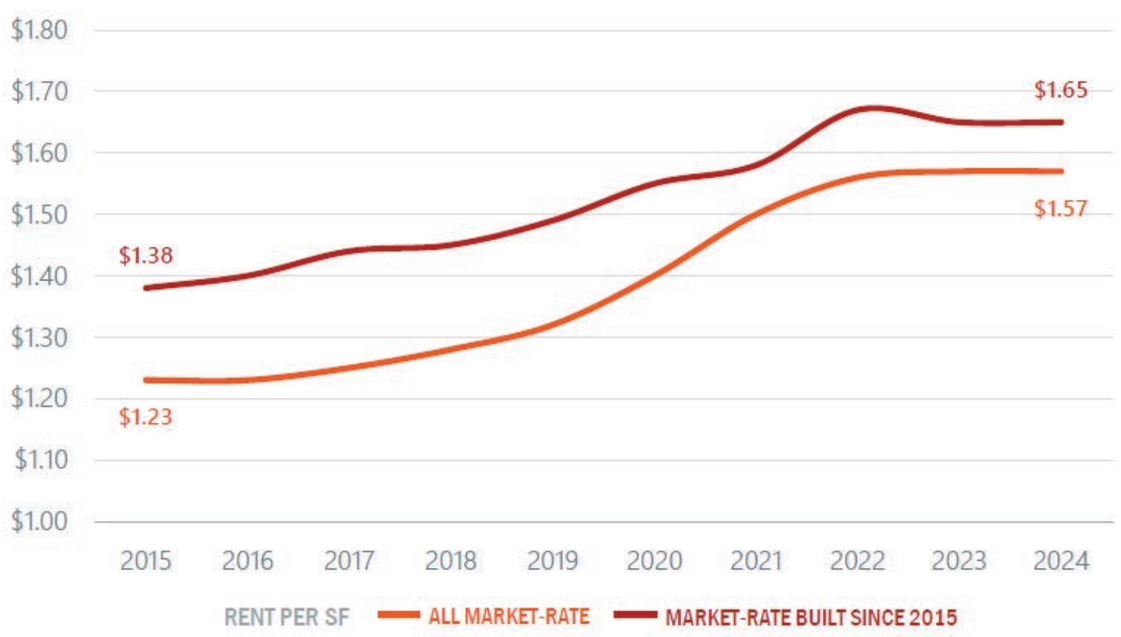
Since 2015, market-rate rents across all units have increased from $1.23 per SF to $1.57 per SF. Market-rate rents have grown at a CAGR of 2.7%. Market-rate rents for projects built since 2015 have increased from $1.38 per SF in 2015 to $1.65 per SF in 2024.

Compared to all market-rate projects, rents of projects built since 2015 have grown at a slower CAGR of 2.0%. From 2015 to 2024,

2.13 BILLINGS MULTI FAMILY UNITS DELIVERED AND VACANCY RATE



2.14 BILLINGS MARKET RATE MULTI FAMILY EFFECTIVE RENT PER SF



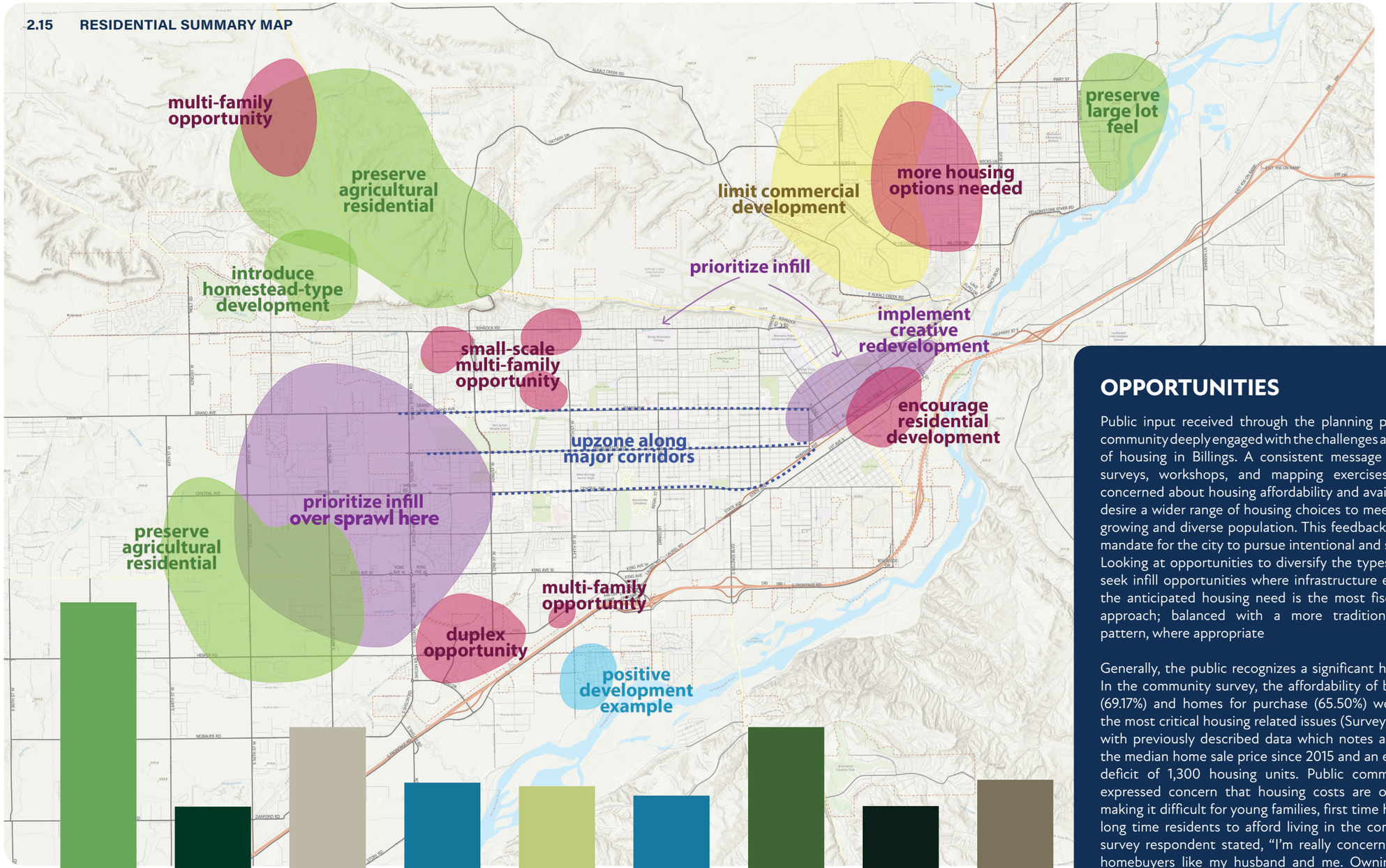
LOOKING FORWARD

Continued population growth, projected to exceed 30,000 additional residents by 2045, combined with a long-standing housing shortage will require a sustained and intentional increase in housing production. In total, the city will need to add approximately 26,200 new housing units over the next two decades to meet both future demand and existing unmet need (as estimated by the Billings Association of REALTORS®).

While recent housing development has contributed to overall supply, much of the growth since 2015 has occurred near the edges of the city, reinforcing outward expansion rather than fully leveraging existing neighborhoods and infrastructure. Local studies consistently identify infill residential development as a key opportunity to increase the supply of housing attainable to Billings residents while supporting more efficient land use patterns.

Addressing Billings' housing needs will require aligning future land use decisions with these realities. Accommodating growth in a way that supports housing choice, affordability, and long-term community goals will depend on enabling a wider range of housing types, locations, and development patterns throughout the city.

2.15 RESIDENTIAL SUMMARY MAP

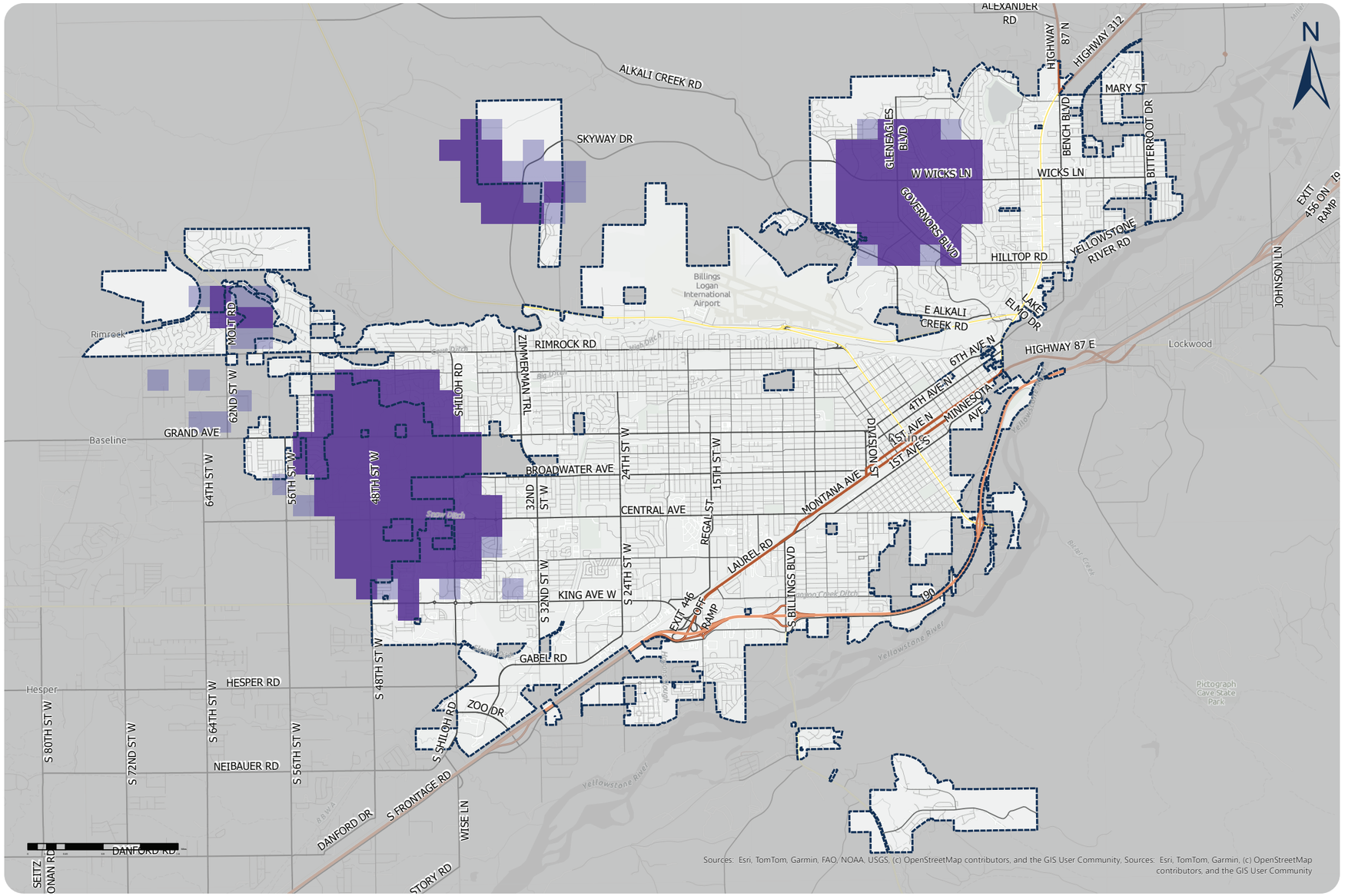


2.16 SURVEY Q13: WHAT SPECIFIC TYPES OF RESIDENTIAL DEVELOPMENT WOULD YOU LIKE TO SEE MORE OF IN BILLINGS?

OPPORTUNITIES

Public input received through the planning process reveals a community deeply engaged with the challenges and opportunities of housing in Billings. A consistent message emerged across surveys, workshops, and mapping exercises: residents are concerned about housing affordability and availability, and they desire a wider range of housing choices to meet the needs of a growing and diverse population. This feedback provides a clear mandate for the city to pursue intentional and strategic growth. Looking at opportunities to diversify the types of housing and seek infill opportunities where infrastructure exists to address the anticipated housing need is the most fiscally responsible approach; balanced with a more traditional development pattern, where appropriate

Generally, the public recognizes a significant housing shortage. In the community survey, the affordability of both rental units (69.17%) and homes for purchase (65.50%) were identified as the most critical housing related issues (Survey, Q11). This aligns with previously described data which notes a 75% increase in the median home sale price since 2015 and an estimated annual deficit of 1,300 housing units. Public comments frequently expressed concern that housing costs are outpacing wages, making it difficult for young families, first time homebuyers, and long time residents to afford living in the community. As one survey respondent stated, “I’m really concerned for first time homebuyers like my husband and me. Owning a home feels increasingly unattainable, and it seems like our generation is being pushed into renting indefinitely”. The desire for more housing options was a recurring theme, with residents advocating for everything from single family homes to more diverse, dense, and innovative housing types.



2.17 SINGLE-FAMILY RESIDENTIAL HOTSPOT MAP

Single Family Housing

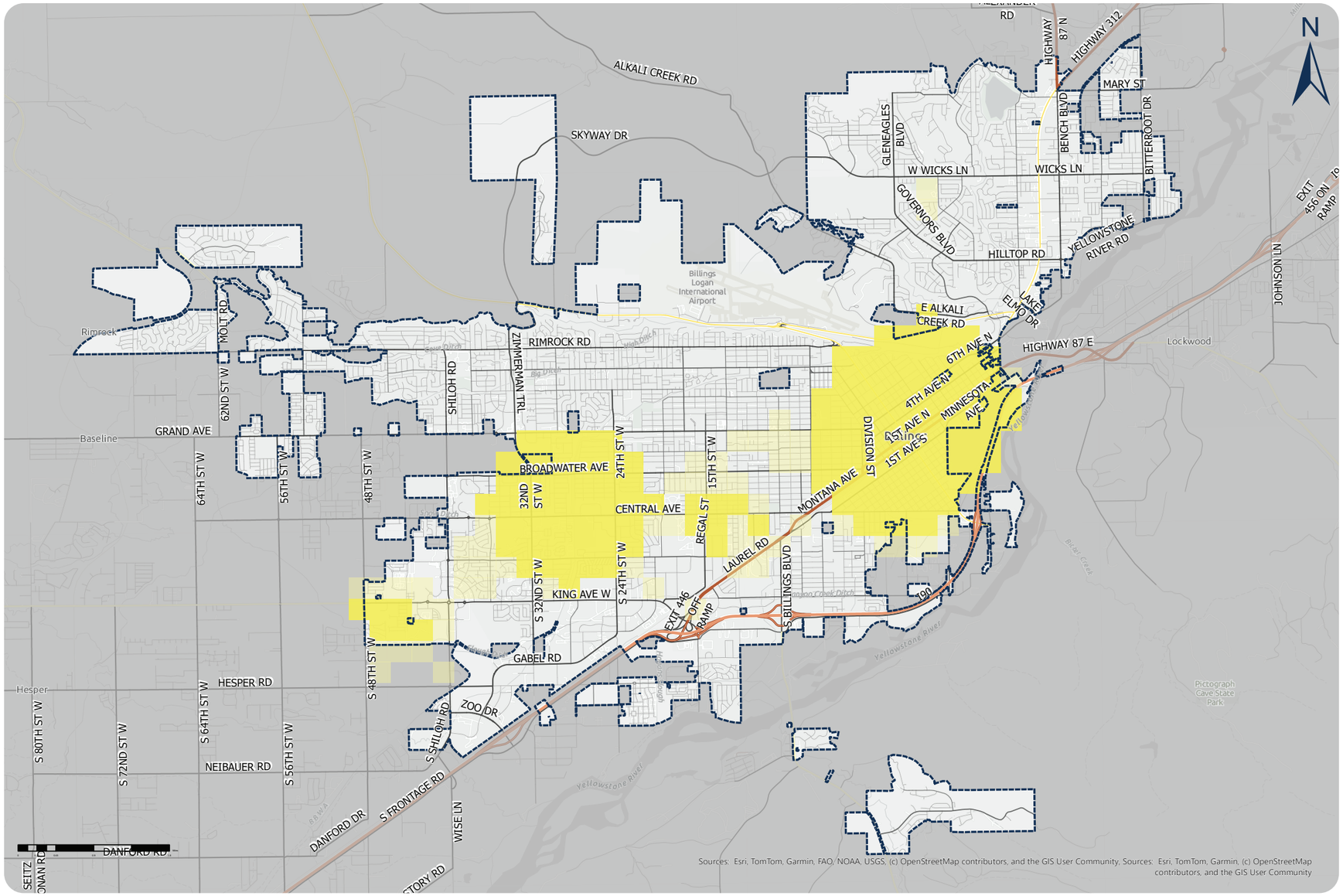
Demand for traditional single family detached housing remains strong. In the community survey, 65.28% of respondents indicated they would like to see more single-family detached housing, the most popular option presented (Survey, Q13). This preference was mirrored in public engagement sessions, where single family detached housing received strong positive feedback on the residential preference boards. The public mapping exercises identified several key areas for potential single-family development. The map shows significant interest in the West End, particularly in the areas around Grand Avenue and King Avenue West, and in the North Elevation and Heights area near Wicks Lane. The Residential Summary Map also highlights a desire to preserve agricultural residential character in the northwest and southwest quadrants of the city and to preserve the large lot feel in the area east of the Yellowstone River, suggesting a continued appreciation for lower density, single family neighborhoods.

However, this desire for single family homes is balanced by concerns about urban sprawl and the loss of agricultural land. This suggests an opportunity for the city to encourage single family development in a more compact and efficient manner, such as through small lot homes, which received positive feedback in engagement sessions, and by concentrating new development in areas with existing infrastructure.

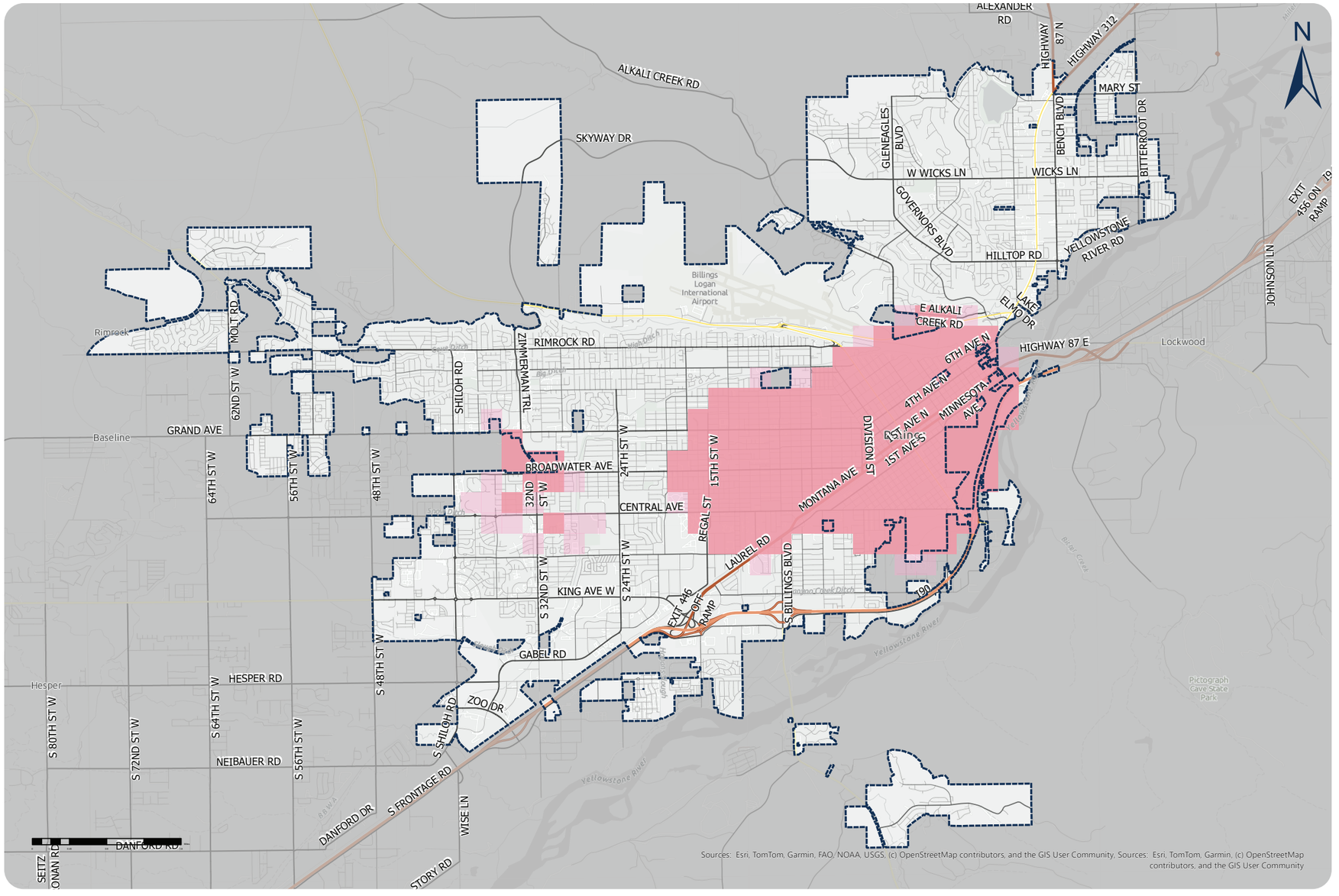
Multifamily Housing

While single-family homes are popular, there is also significant public support for a greater diversity of housing types, including multifamily options. The Residential Summary Map identifies multiple multifamily opportunity zones, particularly in the northwest, near the I-90 corridor in the south-central part of the city, and along major transportation corridors. The hotspot map reinforces this, showing a concentration of interest for multifamily development in Midtown and along the Central Avenue and Montana Avenue corridors. This aligns with the existing conditions narrative, which identifies a lack of housing diversity as a key challenge, noting that 71% of the city's housing stock is single family, while renters have far fewer choices. Gentle density and multifamily development at key nodes can increase the multifamily housing stock while maintaining the character of the city

Public input shows an appetite for various forms of multifamily housing. In the survey, nearly 22% of respondents wanted to see more apartment or condominium complexes (Survey, Q13). Even more popular was the concept of upper story housing, which garnered support from 38.71% of survey respondents and was the second most popular residential type on the engagement boards. This indicates a strong opportunity for mixed use development, especially in the downtown core and along commercial corridors, which would add housing units while also activating commercial areas. Comments from the engagement boards also supported "small scale multifamily opportunity," suggesting that residents are open to gentle density increases that are well-integrated into existing neighborhoods.



2.18 MULTIFAMILY RESIDENTIAL HOTSPOT MAP



2.19 INFILL RESIDENTIAL HOTSPOT MAP

Infill Housing

Perhaps the most significant area of consensus in public feedback was the need for more infill development. The Residential Summary Map is dominated by large areas where residents asked the city to prioritize infill. The hotspot map shows this interest is most concentrated in the city's central core, from Downtown and Midtown west to the Shiloh area, though this category saw broad city-wide support. This desire to grow inward rather than outward was a constant theme in public comments, with many residents citing the inefficiency of sprawl and the need to leverage existing infrastructure.

This support for infill aligns with a strong desire for "missing middle" housing types, which can increase density while maintaining neighborhood character. On the engagement boards, "Missing middle housing infill development" was the most popular residential preference, receiving 15 green dots and only one red dot. While the survey did not use this exact term, several missing middle housing types were very popular in Question 13:

- Cluster or conservation development: 38.71% support
- Cottage courts: 27.46% support
- Patio homes: 26.84% support
- Accessory Dwelling Units (ADUs): 24.09% support
- Townhomes or rowhouses: 21.88% support

This strong support for a variety of housing types beyond traditional single family homes and large apartment complexes presents a major opportunity for Billings. Encouraging these housing types through zoning reform and updated development regulations can help the city meet its housing demand, improve affordability, and create more diverse and walkable neighborhoods, as desired by the community.

> **“Housing affordability + access. This is a basic human need and we can certainly do a better job in ensuring our unhoused neighbors can attain this basic need.”**

Community survey response when asked to identify their greatest concern for Billings’ future

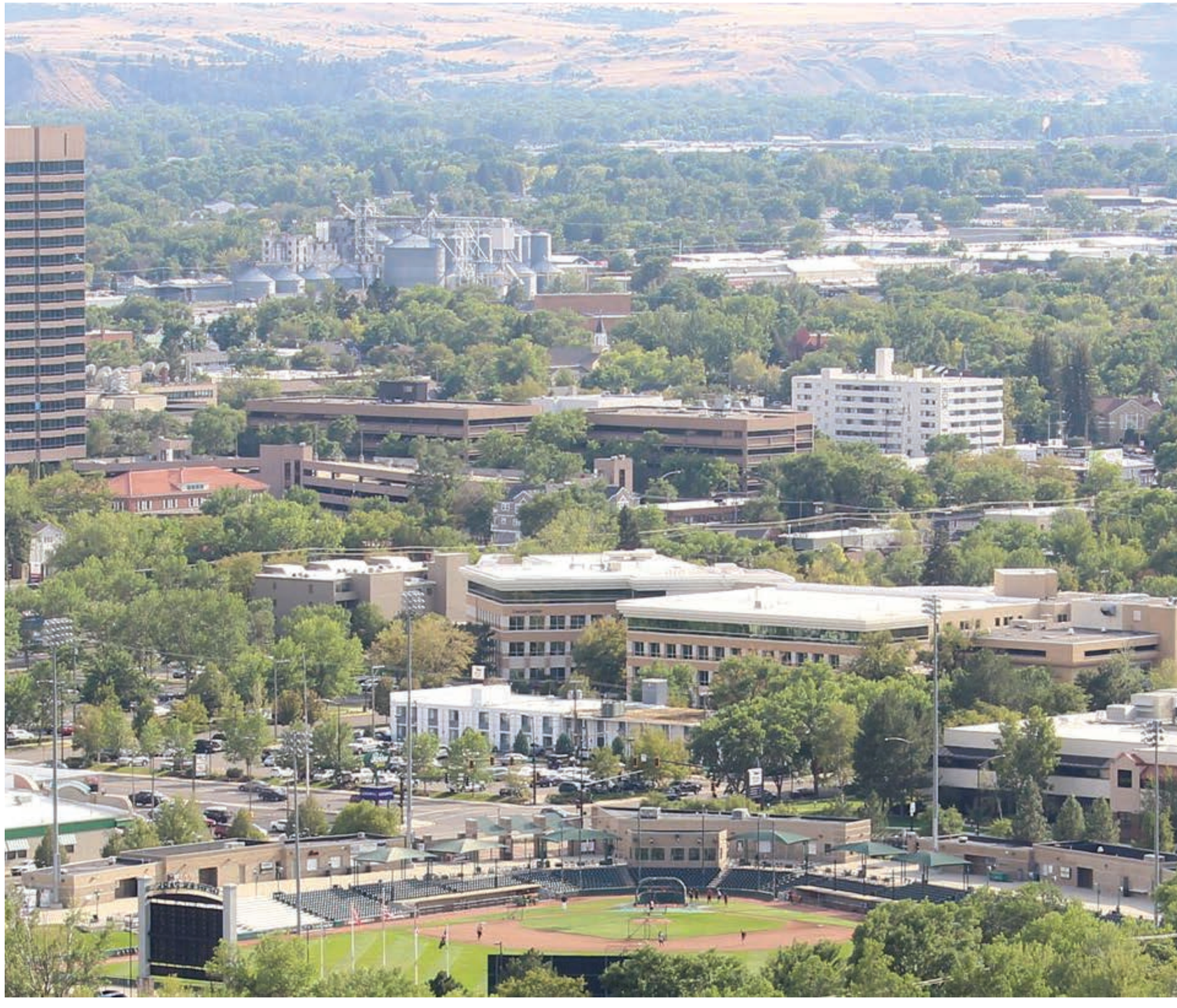
ACHIEVING PLAN THEMES

The public’s input on housing directly reflects and reinforces the data described in the existing conditions summary. The community’s overwhelming concern for affordability is a direct response to the market realities of rising prices and a stagnant housing supply. The public’s desire for more housing diversity is a clear answer to the finding that the city’s housing stock is dominated by single family homes. The future land use map must consider nodal development areas for different housing types throughout the community even in areas of current single family concentrations. The strong push for infill development is a community-driven solution to the unsustainable pattern of outward expansion. The public has not only identified the problems but has also pointed toward the solutions.

Looking forward, this public feedback provides a powerful foundation for implementing the plan themes. The call for a variety of housing options directly supports the theme to expand housing options and affordability to support residents across incomes, ages, and household types. By allowing for and encouraging single-family, multifamily, and missing middle housing in appropriate locations, Billings can begin to address its housing deficit and create a more equitable housing market. The focus on infill and redevelopment of the urban core aligns with the themes to align land use decisions with the capacity and long term sustainability of infrastructure and reinforce Billings’ identity through context sensitive development, downtown vitality, and distinctive neighborhoods.

Over the next 20 years, the City of Billings should leverage this clear public mandate to guide its housing strategy. This involves updating zoning codes to allow for a greater diversity of housing types by right, particularly in the central parts of the city identified for infill. It means streamlining the development review process for projects that meet the community’s goals for infill and mixed-use development. It also means investing in infrastructure to support growth in these areas and ensuring that new development contributes to the creation of walkable, attractive, and complete neighborhoods. By embracing the community’s vision, Billings can grow in a way that is both economically vibrant and true to the character of the city, ensuring that it remains a desirable place to live for all its residents for decades to come.

BILLINGS 2045



FROM PRESENT TO FUTURE

3

PLACETYPES

In Billings, a placetype is a descriptive framework used to define the character, function, and experience of both the natural and built environment. Traditional land use categories focus primarily on how land is used. Placetypes expand on this by also addressing development intensity, building scale, site design, and how an area relates to its surroundings.

Each placetype helps explain how a part of the city fits within the larger community. It identifies the types of amenities that support daily activities, the general form and pattern of development, and the overall character people can expect to experience. This approach provides guidance for how areas should grow and change while maintaining a consistent and recognizable identity.

For Billings, a set of placetypes has been established to guide future growth and reinvestment. These placetypes reflect existing development patterns as well as the community's vision for how different areas should evolve. As the city continues to grow, a combination of infill development, redevelopment, and outward expansion will be needed to support new housing, jobs, and services. The placetype framework helps ensure that these changes strengthen community character, improve connectivity, and support long-term livability.

Rather than prescribing rigid outcomes, the placetype system provides a flexible structure. It recognizes current conditions while setting clear expectations for future improvements. This allows Billings to accommodate change without losing the qualities that define its neighborhoods, commercial areas, and open spaces.

OVERVIEW OF THE BILLINGS PLACETYPE FRAMEWORK

The placetypes for Billings are based on local conditions, community input, and projected growth trends. Earlier planning efforts, including the West Billings Plan, helped inform this framework. The placetypes have since been refined to apply across the entire city and reflect a wider range of development contexts.

Billings includes established neighborhoods, evolving commercial corridors, industrial districts, and significant open space resources. The placetype framework recognizes this diversity while supporting appropriate transitions between different areas. Public input emphasized the importance of maintaining neighborhood character, improving access to services and amenities, and guiding infill and new development so it fits within the existing pattern of the city.

The following placetypes represent current and desired future conditions across Billings:

- Rural Residential and Agricultural
- County Neighborhoods
- Suburban Residential*
- Urban Residential Limited
- Urban Residential
- Urban Residential Mixed
- Urban Node
- Commercial Mixed
- Downtown Urban
- Employment and Industrial
- Open Space
- Public Institutional

These placetypes have been applied across the city to reflect existing land use patterns and development character. This provides a baseline understanding of how Billings functions today.

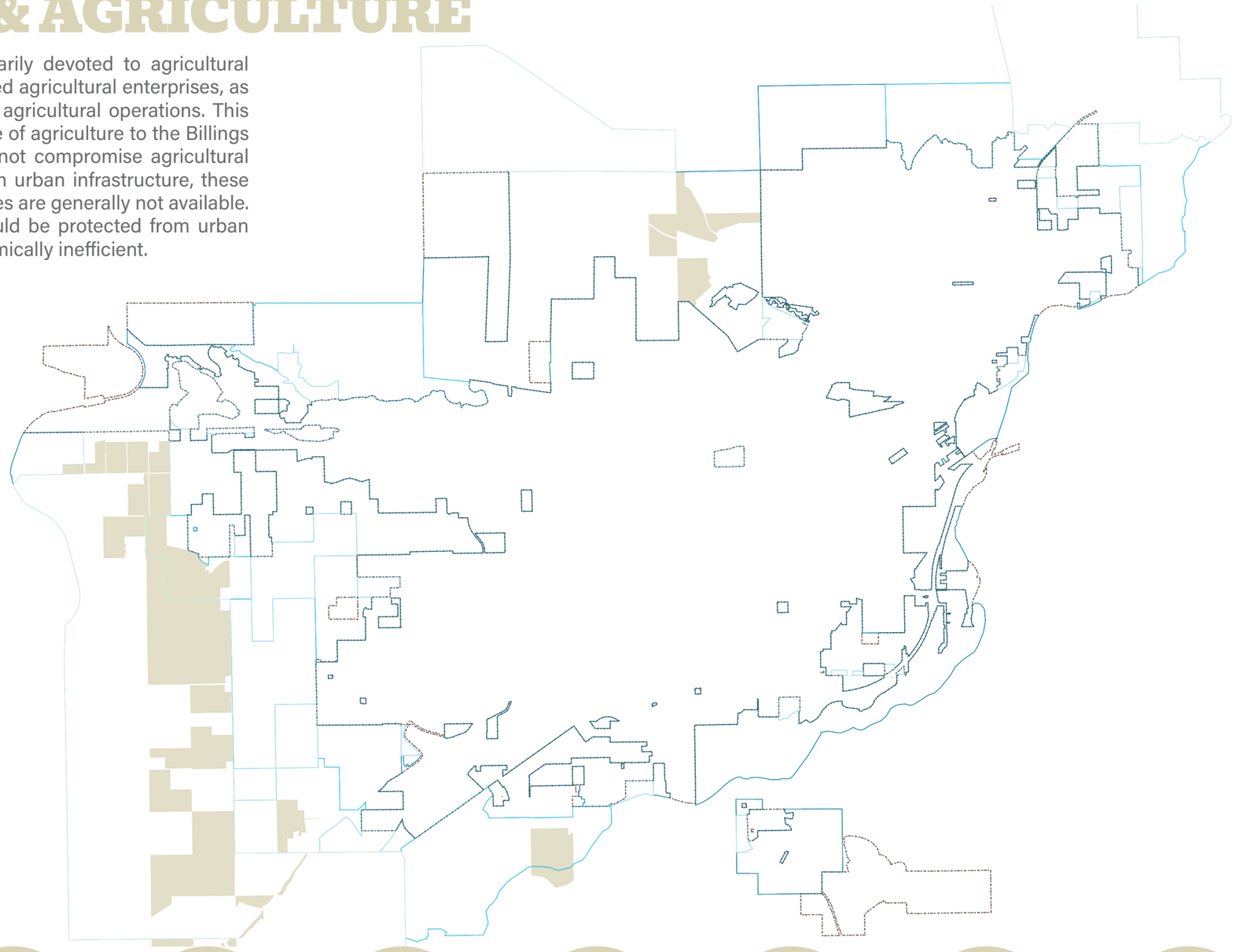
The framework also identifies where change is expected over time. Future growth will be directed to key opportunity areas, including redevelopment sites, strategic corridors, and expanding edges of the city. The Future Placetype Map illustrates how different areas are expected to evolve over the planning horizon and helps guide decisions related to land use, infrastructure, and investment.

This operating plan map does not reflect any changes resulting from public feedback collected on the Billings 2045 Land Use Plan and Future Land Use Map. Summary maps for each placetype follow; the full composite map can be found in Appendix B of this plan.

*This placetype has been added at the request of the City Council following public outreach events conducted April 6-9.

RURAL RESIDENTIAL & AGRICULTURE

The Rural Residential & Agriculture category encompasses lands primarily devoted to agricultural production, including crop cultivation, livestock operations, and value-added agricultural enterprises, as well as very low-density residential development that is compatible with agricultural operations. This category recognizes the economic, cultural, and environmental importance of agriculture to the Billings region while accommodating limited residential development that does not compromise agricultural viability. Due to the low-density nature of development and distance from urban infrastructure, these areas are all outside the City Limits and public water and wastewater utilities are generally not available. This category is appropriate for areas where agricultural operations should be protected from urban encroachment and where the extension of urban services would be economically inefficient.



PRIMARY USES & BUILDING TYPES

- Crop production and livestock operations
- Agricultural support facilities (barns, equipment storage, grain storage)
- Single-unit detached residences
- Manufactured homes
- Accessory dwelling units
- Agricultural worker housing
- Hobby farms, ranchettes ad equestrian facilities

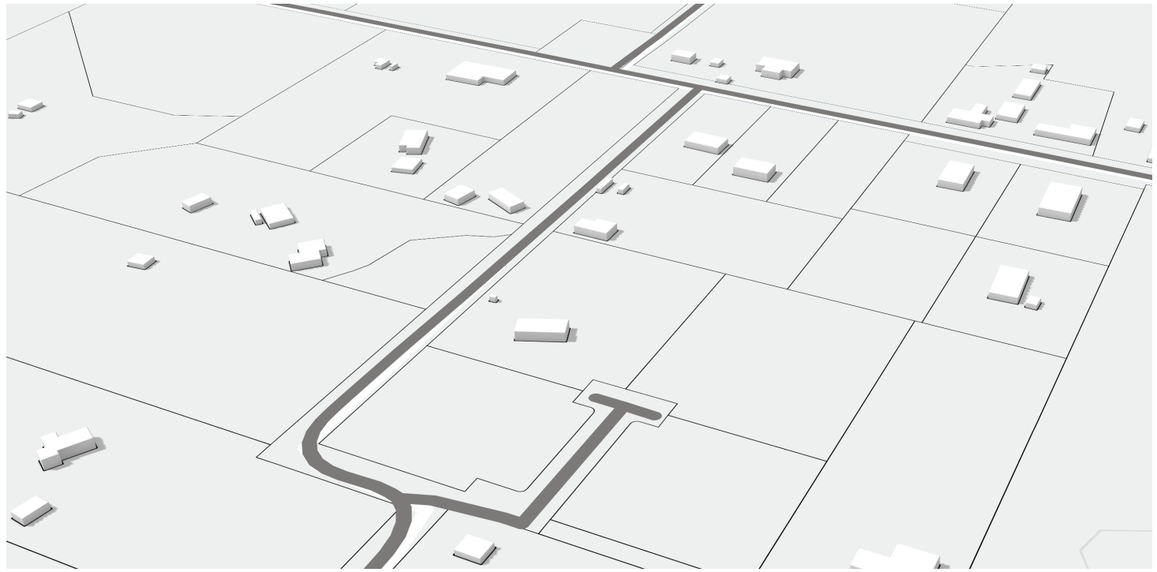
SECONDARY USES & BUILDING TYPES

- Agricultural tourism
- Value-added agricultural processing
- Agricultural education facilities
- Home-based businesses (compatible with rural character)
- Renewable energy production
- Conservation easements and wildlife habitat preservation
- Limited outdoor recreation

RRA

PLACETYPE FEATURES

Density	Generally one dwelling unit per acre or less.
Lot Size	Lot sizes are typically one acre or larger, with 5-40 acres preferred for agricultural operations.
Building Height	Structures are generally low-rise, with residential buildings around 35 feet and agricultural structures up to 45 feet.
Setbacks	Deep setbacks are characteristic, typically 25-35 feet from the front and 25-50 feet from side and rear property lines to maintain an open, rural feel.
Character	Site design should prioritize the preservation of the existing agricultural landscape and natural vegetation. Formal, manicured landscaping is not required.
Buffering	Encourage the use of landscape buffers and screening to mitigate potential conflicts between agricultural operations and residential uses.
Parking	On-site parking is typically accommodated on gravel or pervious surfaces appropriate to the rural context.
Miscellaneous	Promote the use of low-impact development techniques that preserve natural drainage patterns.

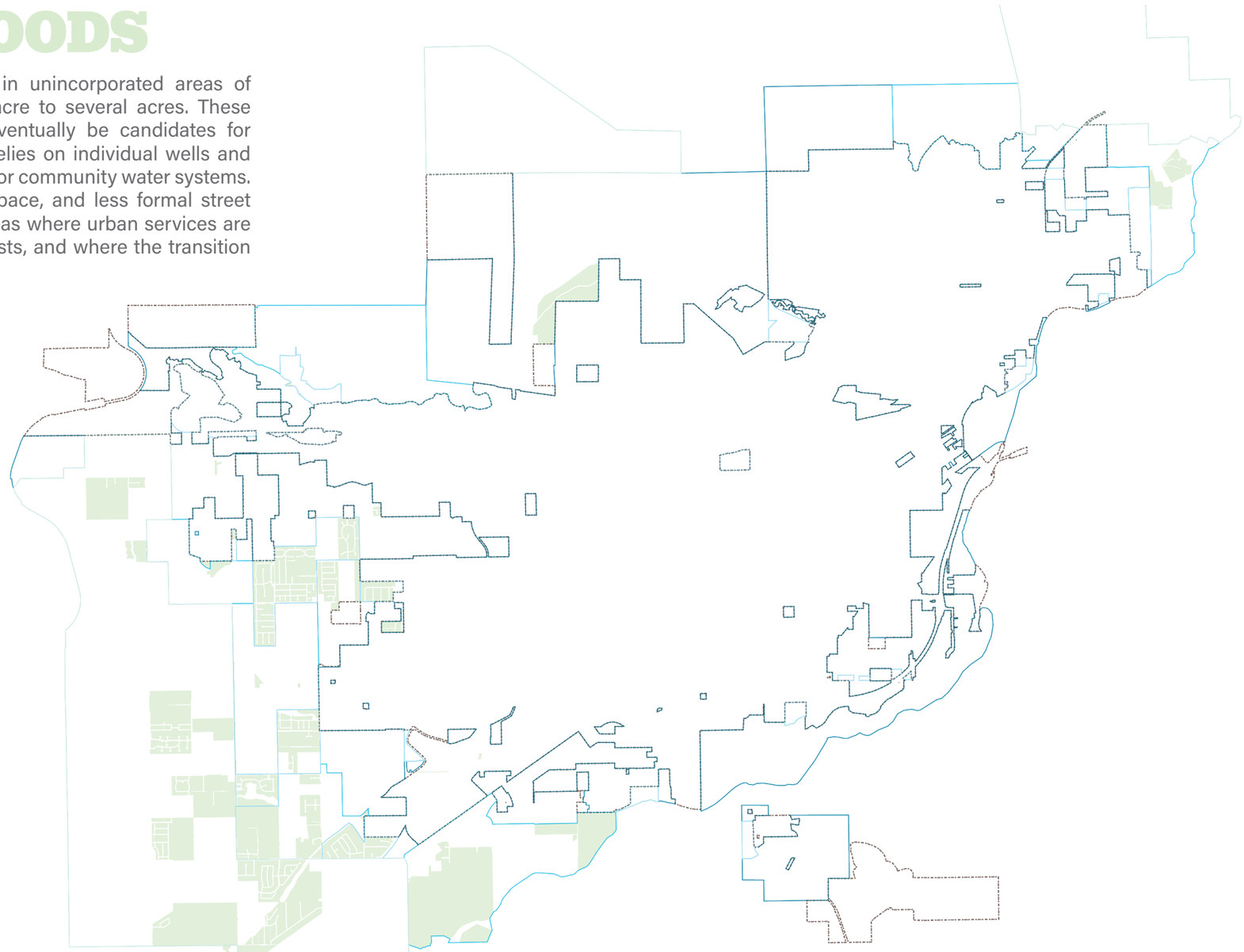


MOBILITY & CONNECTIVITY

- The transportation network is primarily composed of rural roads that follow the section line grid, designed to accommodate both passenger vehicles and large agricultural equipment.
- Connectivity should be maintained for agricultural access while connecting to the larger road network.
- Pedestrian and bicycle facilities are generally not provided, reflecting the rural, low-density nature of the area.

COUNTY NEIGHBORHOODS

County Neighborhoods represent low-density residential development in unincorporated areas of Yellowstone County, characterized by lot sizes ranging from one-third acre to several acres. These neighborhoods often develop along existing county roads and may eventually be candidates for annexation as the city expands. Development in this category typically relies on individual wells and septic systems, though some areas may have access to rural water districts or community water systems. The character is distinctly suburban-rural, with larger lots, more open space, and less formal street networks than urban residential areas. This category is appropriate for areas where urban services are not immediately available but where residential development pressure exists, and where the transition from rural to urban land uses should occur gradually over time.



PRIMARY USES & BUILDING TYPES

- Single-unit detached residences
- Manufactured homes
- Accessory dwelling units
- Small-scale agricultural uses

SECONDARY USES & BUILDING TYPES

- Home-based businesses (compatible with rural character)
- Bed and breakfast establishments
- Day care facilities
- Recreational facilities and open space
- Community gardens
- Equestrian facilities (personal use)
- Small-scale renewable energy systems

PLACETYPE FEATURES

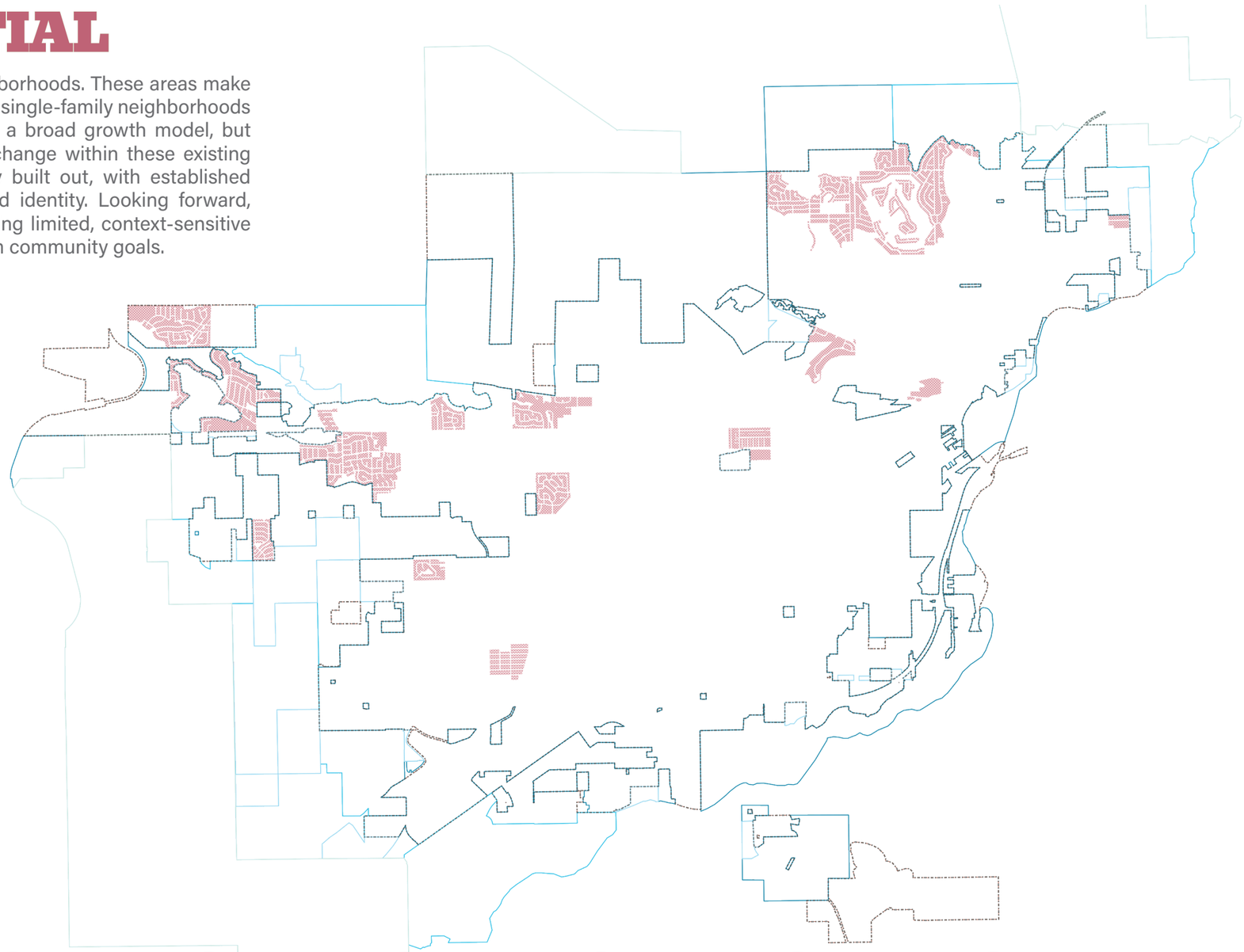
Density	Densities are low, generally ranging from 0.33 to 0.99 dwelling units per acre.
Lot Size	Lots are typically large, with a general minimum of one-third of an acre.
Building Height	Buildings are typically limited to a maximum height of around 34 feet (3 stories).
Setbacks	Setbacks are generous, around 10-30 feet in the front and 10-25 feet on the side and rear, to maintain a spacious, semi-rural character.
Character	Encourage landscaping that utilizes drought-tolerant and native species. A significant portion of each lot should be maintained as landscaped or natural open space.
Buffering	Where these neighborhoods abut more intensive agricultural or industrial uses, landscape buffers should be used to provide a transition.
Parking	Provide adequate on-site parking, typically two spaces per home. The use of pervious surfaces is encouraged.
Miscellaneous	Promote the use of low-impact development techniques that preserve natural drainage patterns.

MOBILITY & CONNECTIVITY

- These neighborhoods are connected to the larger road network via collectors or arterials, with internal streets that may be paved or gravel.
- Future development should be planned to allow for future pedestrian and bicycle connectivity if the area is annexed and urbanized.
- Sidewalks are not required in unzoned area, but rights-of-way should be preserved for future installation.

SUBURBAN RESIDENTIAL

Suburban Residential areas represent primarily existing, established neighborhoods. These areas make up a portion of the city's current residential fabric and are defined by stable, single-family neighborhoods with consistent development patterns. This placetype is not intended as a broad growth model, but rather as a framework to recognize, preserve, and incrementally guide change within these existing neighborhoods. Suburban Residential areas are typically fully or largely built out, with established infrastructure, mature landscaping, and a strong sense of neighborhood identity. Looking forward, this placetype focuses on maintaining neighborhood stability while allowing limited, context-sensitive evolution to address housing needs, infrastructure efficiency, and long-term community goals.



PRIMARY USES & BUILDING TYPES

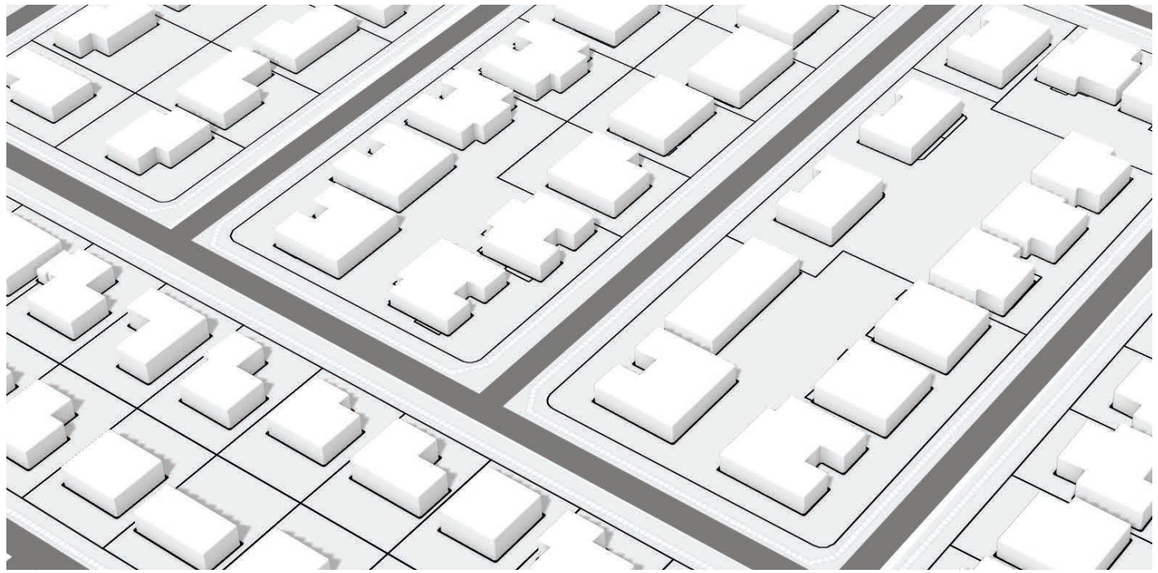
- Single-unit detached residences
- Accessory dwelling units

SECONDARY USES & BUILDING TYPES

- Existing duplexes and townhomes
- Neighborhood parks and open space
- Schools and civic uses embedded within neighborhoods

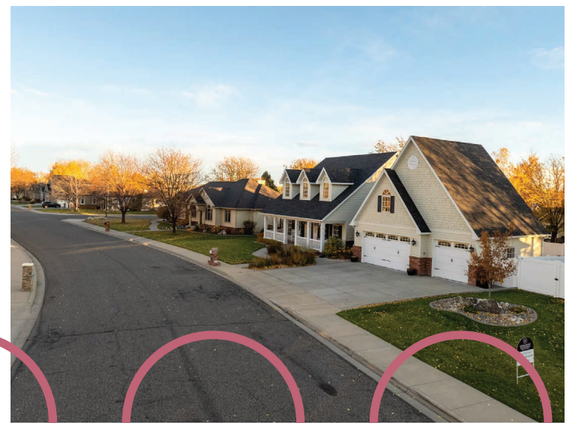
PLACETYPE FEATURES

Density	Densities are low to moderate, generally ranging from 2 to 6 dwelling units per acre
Lot Size	Lots are typically medium in size, generally ranging from 7,000 to 15,000 square feet, with some variation based on subdivision age and location
Building Height	Buildings are typically limited to a maximum height of around 30–35 feet
Setbacks	Setbacks are uniform, typically 20 feet in the front and 5-20 feet on the sides and rear, creating a consistent streetscape.
Character	Preserve the established suburban neighborhood character, including consistent building scale, yard patterns, and mature landscaping. Encourage reinvestment and landscaping that incorporates drought-tolerant and regionally appropriate species.
Buffering	Where Suburban Residential areas abut higher-intensity uses or major corridors, landscape buffering, fencing, or transitional building forms should be used to protect neighborhood character and reduce impacts
Parking	Provide adequate on-site parking, typically two spaces per dwelling unit, primarily in garages or driveways. Minimize visual impacts of front-loaded garages where feasible.
Miscellaneous	Promote incremental, context-sensitive infill and redevelopment that is compatible with existing neighborhood form. Encourage infrastructure reinvestment and low-impact development techniques where feasible within established conditions.



MOBILITY & CONNECTIVITY

- The street network consists of paved neighborhood streets with multiple connections to the city's collector and arterial road system.
- Sidewalks are required to ensure a safe environment for pedestrians.
- Bicycle connectivity to local destinations like schools and parks should be provided via low-traffic streets or shared-use paths.



URBAN RESIDENTIAL LIMITED

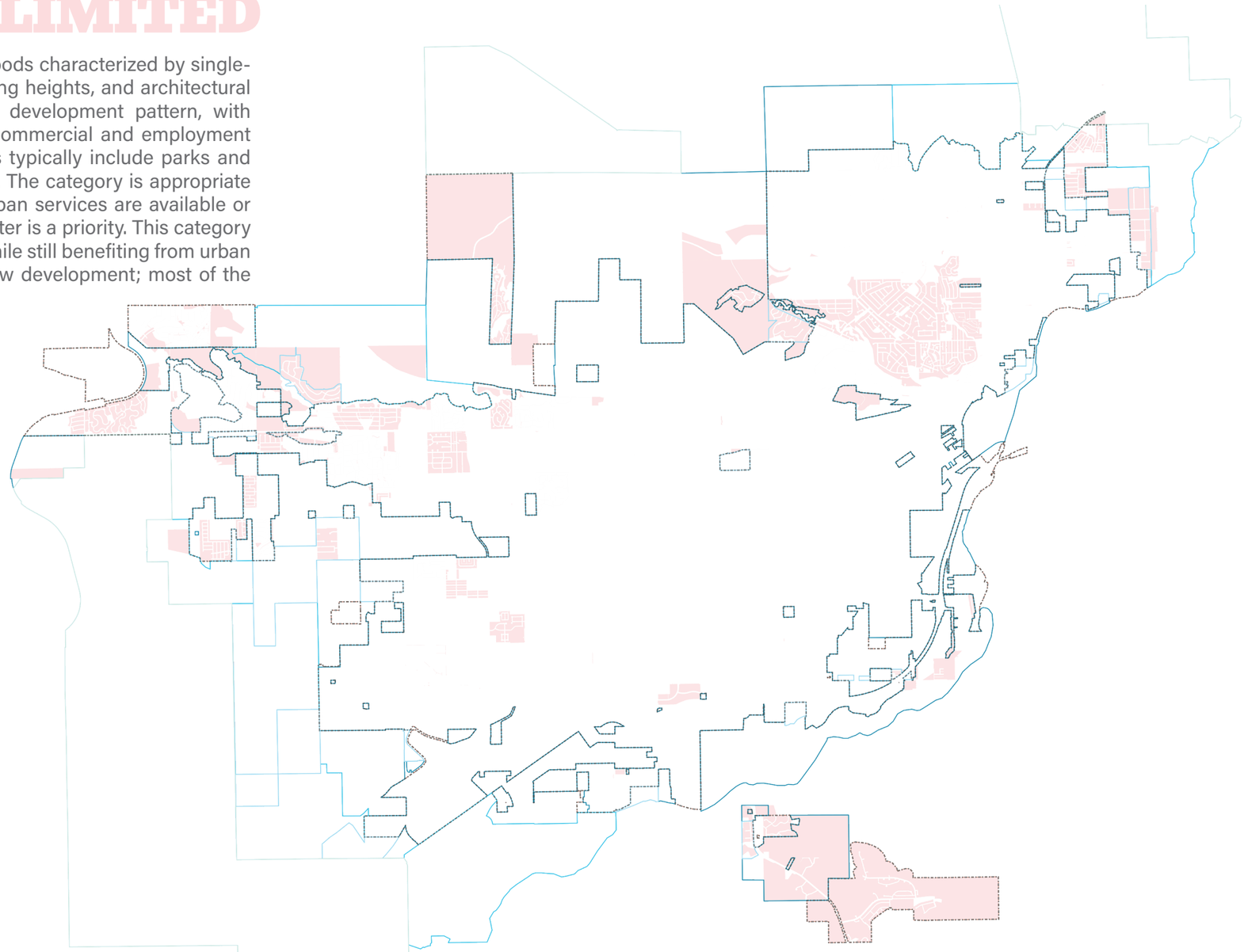
Urban Residential Limited encompasses established suburban neighborhoods characterized by single-family detached homes on individual lots, with consistent setbacks, building heights, and architectural character. This category represents the traditional American suburban development pattern, with curvilinear streets, cul-de-sacs, and separation of residential uses from commercial and employment areas. Public water and sewer services are provided, and neighborhoods typically include parks and other community amenities within reasonable walking or driving distance. The category is appropriate for areas where low-density residential development is desired, where urban services are available or planned, and where the preservation of single-family neighborhood character is a priority. This category is typified by larger lots with private yards, and a residential environment while still benefiting from urban infrastructure and services. These neighborhoods are less common in new development; most of the areas classified as URL are existing neighborhoods in the City.

PRIMARY USES & BUILDING TYPES

- Single-unit residential
- Duplexes
- Accessory dwelling units

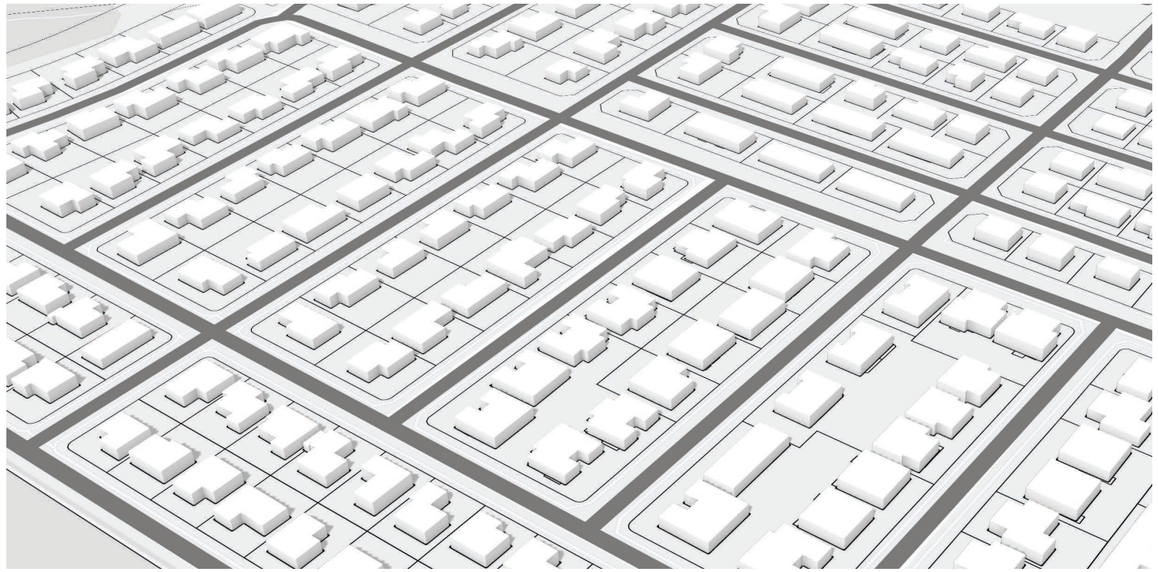
SECONDARY USES & BUILDING TYPES

- Parks and playgrounds
- Places of assembly
- Community centers
- Home occupations
- Day care facilities
- Bed and breakfast establishments
- Urban agriculture



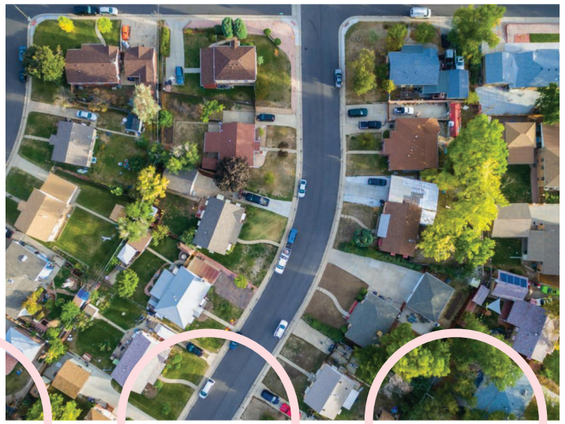
PLACETYPE FEATURES

Density	A low-density suburban pattern, with densities generally ranging from 3.5 to 7 dwelling units per acre.
Lot Size	Typical lot sizes range from 5,000 to 15,001 square feet.
Building Height	Building heights are consistent, generally around 30-35 feet (3 stories).
Setbacks	Setbacks are uniform, typically 20 feet in the front and 5-20 feet on the sides and rear, creating a consistent streetscape. Build-to zones may be used.
Character	Encourage well-maintained landscapes that contribute to an attractive streetscape. A significant portion of the lot, particularly the front yard, should be landscaped.
Buffering	Where adjacent to non-residential uses, landscape buffers should be used to screen and soften the transition.
Parking	Policy supports providing two off-street parking spaces per home, typically in a garage and driveway.
Miscellaneous	All utilities should be placed underground to improve the visual quality of the neighborhood.



MOBILITY & CONNECTIVITY

- The street network consists of paved neighborhood streets with multiple connections to the city's collector and arterial road system.
- Sidewalks are required to ensure a safe environment for pedestrians.
- Bicycle connectivity to local destinations like schools and parks should be provided via low-traffic streets or shared-use paths.



URBAN RESIDENTIAL

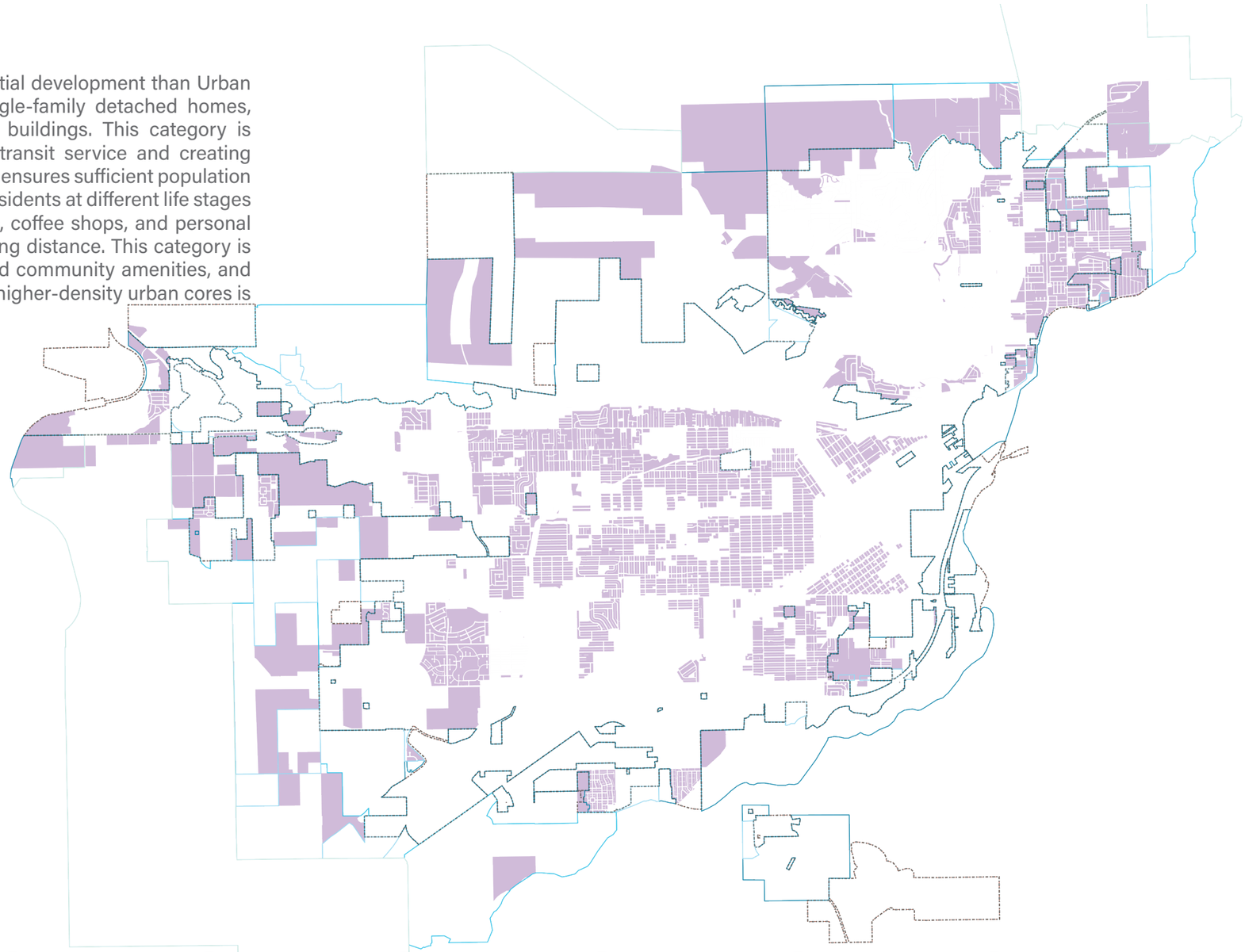
Urban Residential represents a more diverse and compact form of residential development than Urban Residential Limited, incorporating a mix of housing types including single-family detached homes, duplexes, triplexes, fourplexes, townhomes, and small-scale multifamily buildings. This category is designed to provide housing choice and affordability while supporting transit service and creating walkable neighborhoods with convenient access to daily needs. The density ensures sufficient population to support bus transit, while the mix of housing types provides options for residents at different life stages and income levels. Neighborhood commercial uses such as corner stores, coffee shops, and personal services are permitted on a limited basis to serve daily needs within walking distance. This category is appropriate for areas along transit corridors, near employment centers and community amenities, and in locations where a transition between lower-density suburban areas and higher-density urban cores is desired.

PRIMARY USES & BUILDING TYPES

- Single-unit residential
- Duplexes, triplexes & fourplexes
- Townhomes
- Accessory dwelling units
- Live-work units
- Neighborhood parks and plazas

SECONDARY USES & BUILDING TYPES

- Neighborhood commercial (corner stores, coffee shops, bakeries)
- Professional offices and personal services (dental, legal, salons)
- Places of assembly
- Home occupations
- Day care facilities
- Small-scale group homes
- Short-term rentals
- Urban agriculture



PLACETYPE FEATURES

Density	A moderate density range of 6 to 16 dwelling units per acre is encouraged to support transit and walkability.
Lot Size	Lot sizes vary by housing type, generally starting at 4,000 sq ft for single-family and increasing for multifamily structures.
Building Height	Building heights are generally up to 35-40 feet (3 stories).
Setbacks	Setbacks are reduced, with build-to zones of 5-20 feet, to create a more pedestrian-oriented streetscape.
Character	Encourage pedestrian-oriented landscaping with a strong emphasis on street trees. Front yard design should help define the public and private realm through low walls, fences, or hedges.
Buffering	Where more intensive multifamily buildings are located next to single-family homes, buffers, greater property line setbacks and stepped stories should be used to ensure compatibility.
Parking	Policy should support a flexible approach to parking, with reduced off-street requirements (e.g., 1-1.5 spaces per unit) and the use of on-street parking.
Miscellaneous	The use of green infrastructure, such as rain gardens and permeable pavement, is strongly encouraged. All utilities should be placed underground to improve the visual quality of the neighborhood.

MOBILITY & CONNECTIVITY

- The street network should be highly interconnected with short block lengths (300-400 feet) to create a walkable environment.
- Sidewalks are required.
- A network of bike lanes and shared-use paths should connect the neighborhood to the wider city.
- Streets should be designed with traffic calming measures to prioritize pedestrian safety.

URBAN RESIDENTIAL MIXED

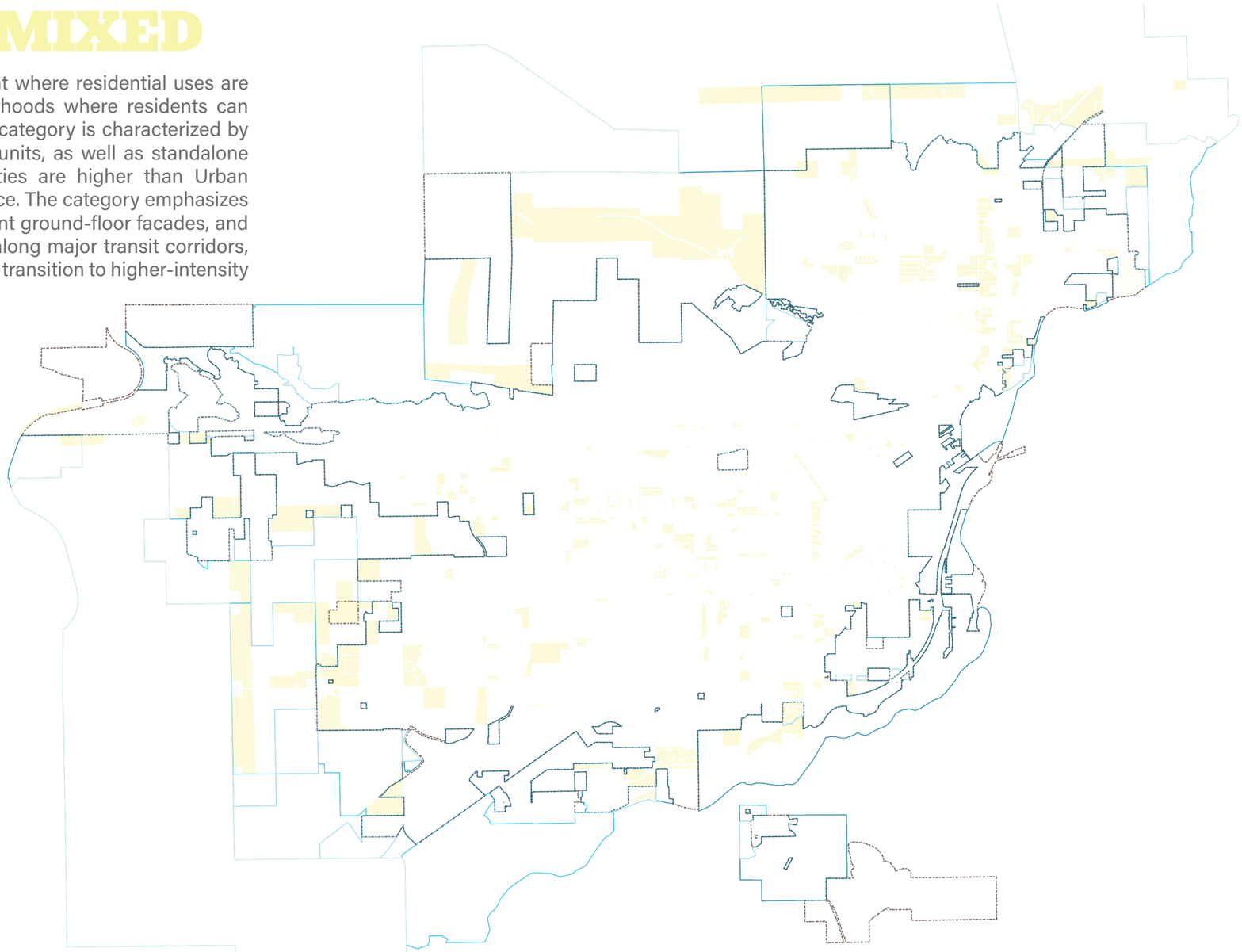
Urban Residential Mixed represents a vibrant, walkable urban environment where residential uses are integrated with commercial and office uses, creating complete neighborhoods where residents can live, work, and access daily services without relying on automobiles. This category is characterized by buildings with ground-floor commercial uses and upper-floor residential units, as well as standalone residential buildings in close proximity to commercial corridors. Densities are higher than Urban Residential to support a greater mix of uses and more frequent transit service. The category emphasizes pedestrian-oriented design, with buildings close to the sidewalk, transparent ground-floor facades, and active uses that engage the street. This category is appropriate for areas along major transit corridors, adjacent to Urban Nodes and employment centers, and in locations where a transition to higher-intensity development is desired.

PRIMARY USES & BUILDING TYPES

- Single-unit residential
- Multi-unit residential (apartments, condominiums)
- Accessory dwelling units
- Townhomes and rowhouses
- Live-work units
- Mixed-use buildings (residential above commercial)
- Senior housing
- Public space (parklets, public plazas, pocket parks)

SECONDARY USES & BUILDING TYPES

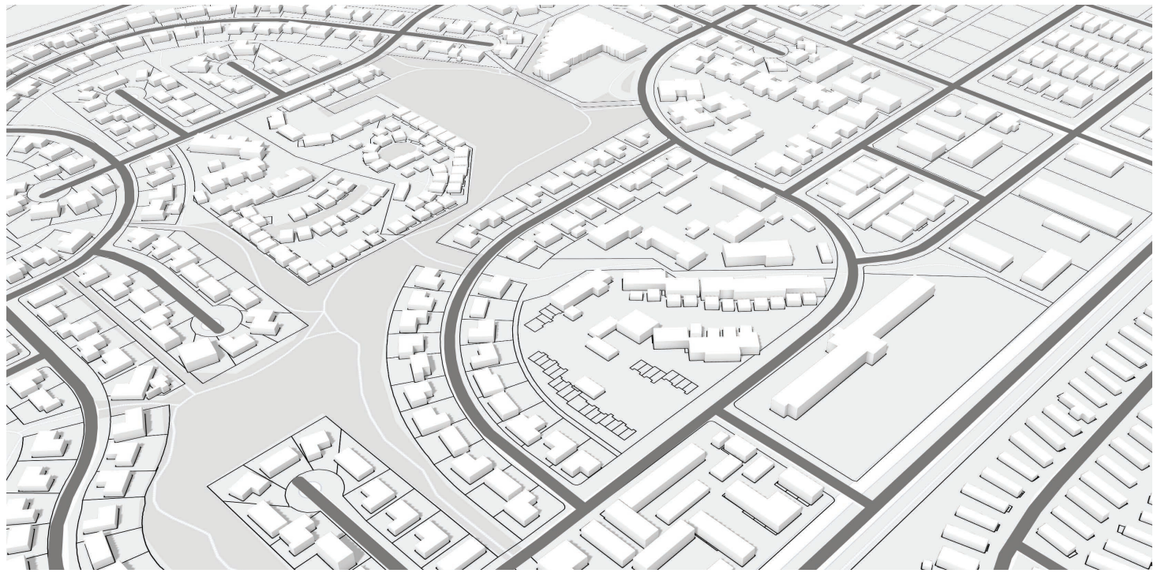
- Retail (grocery stores, boutiques, personal services)
- Offices (medical, dental, legal, financial, real estate)
- Restaurants & cafes
- Coworking spaces and business incubators
- Community facilities (libraries, community centers, health clinics)
- Cultural uses (galleries, performance spaces, studios)
- Short-term accommodations



URM

PLACETYPE FEATURES

Density	Higher densities of 12 to 24 dwelling units per acre are appropriate to support a mix of uses and frequent transit.
Lot Size	Lot sizes are flexible, generally starting around 5,000 sq ft, with smaller configurations possible for townhomes.
Building Height	Building heights are typically in the range of 45 to 55 feet (4 stories).
Setbacks	Buildings should be built close to the sidewalk (0-10 foot setback) to create a continuous, active street edge.
Character	Site design should focus on creating an active and engaging pedestrian realm. Encourage the use of street trees, green walls, and rooftop gardens in place of traditional yard space.
Buffering	Where this category abuts lower-density residential zones, a landscape buffer should be provided to ensure a graceful transition.
Parking	Policy encourages reduced parking ratios (e.g., 1 space per unit) and the use of structured parking that is either screened or wrapped with active uses.
Miscellaneous	The use of green roofs, rain gardens, and permeable pavement should be a standard practice. All utilities should be placed underground to improve the visual quality of the neighborhood.



MOBILITY & CONNECTIVITY

- A highly walkable environment is a key policy goal, supported by short blocks, wide sidewalks (6-8 feet) and shared use pathways to connect community amenities and commercial areas .
- The area should be served by frequent transit.
- Major corridors should feature complete streets design with protected bike lanes.
- Ample bicycle parking and connections to the citywide bicycle network are essential.

URBAN NODE

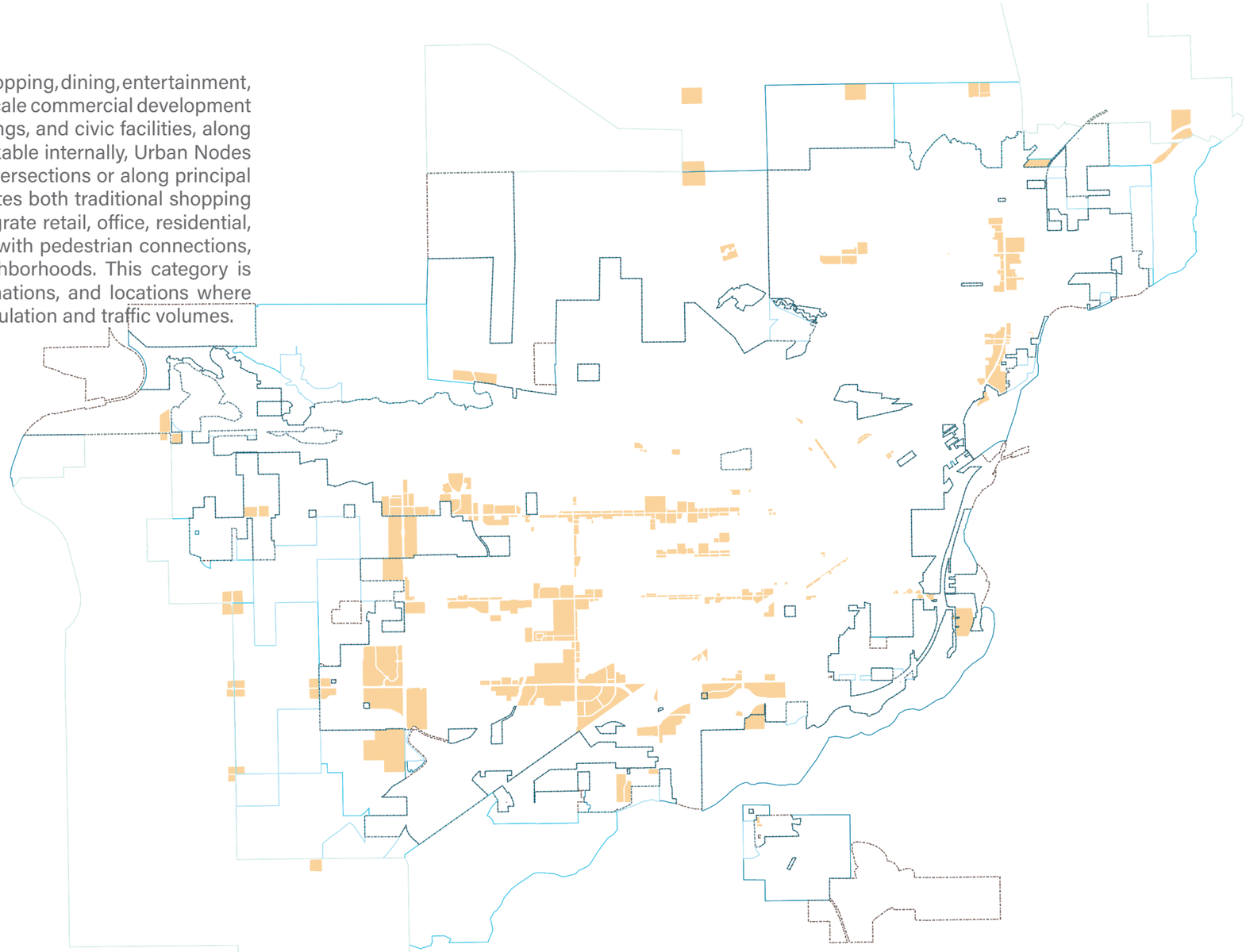
Urban Nodes represent major activity centers that serve as destinations for shopping, dining, entertainment, employment, and civic functions. These nodes are characterized by larger-scale commercial development including shopping centers, big-box retail, restaurants, hotels, office buildings, and civic facilities, along with supporting higher-density residential uses. While designed to be walkable internally, Urban Nodes are primarily accessed by automobile and are typically located at major intersections or along principal arterials with high visibility and traffic volumes. The category accommodates both traditional shopping center formats and newer mixed-use town center developments that integrate retail, office, residential, and public spaces. Urban Nodes should be designed as complete places with pedestrian connections, public gathering spaces, and transitions to surrounding residential neighborhoods. This category is appropriate for major commercial intersections, regional shopping destinations, and locations where significant commercial development can be supported by surrounding population and traffic volumes.

PRIMARY USES & BUILDING TYPES

- Shopping centers and retail complexes
- Big-box retail and department stores
- Grocery stores and supermarkets
- Restaurants (sit-down and fast food)
- Hotels and conference facilities
- Offices and business parks
- Multifamily residential (mid-rise apartments and condominiums)
- Civic and cultural facilities

SECONDARY USES & BUILDING TYPES

- Entertainment venues and recreational facilities
- Banks and financial institutions
- Automobile-oriented uses (gas stations, car washes, auto repair)
- Day care centers and educational facilities
- Public plazas and gathering spaces
- Transit centers and park-and-ride facilities
- Structured parking facilities



PLACETYPE FEATURES

Density	Where residential is included, densities should be 16 dwelling units per acre or greater.
Lot Size	Lots are typically large, 10,000 sq ft or more, to accommodate large-format development
Building Height	Building heights generally range up to 55 feet (5 stories), with opportunities for taller buildings (up to 75 feet) with design review
Setbacks	Setbacks are flexible but should encourage buildings to be oriented towards the street where feasible, with parking to the side or rear.
Character	Encourage high-quality landscaping, particularly along street frontages and within parking areas, to create a more attractive and comfortable environment.
Buffering	A substantial landscape buffer (e.g., 25 feet) with screening should be provided where these nodes are adjacent to residential areas.
Parking	Policy supports shared parking arrangements between different uses to improve efficiency. Parking lots should be broken up with landscaped islands.
Miscellaneous	It is a key policy to ensure safe and direct pedestrian walkways connect buildings, parking areas, and transit stops.

MOBILITY & CONNECTIVITY

- These areas should have excellent access to the arterial and collector street network.
- The internal street network should be designed to prioritize pedestrian safety with well-marked crosswalks and other traffic calming features.
- Nodes should serve as hubs for transit service, with high-quality shelters and amenities.
- Bicycle and pedestrian connections to surrounding neighborhoods are encouraged.

COMMERCIAL MIXED

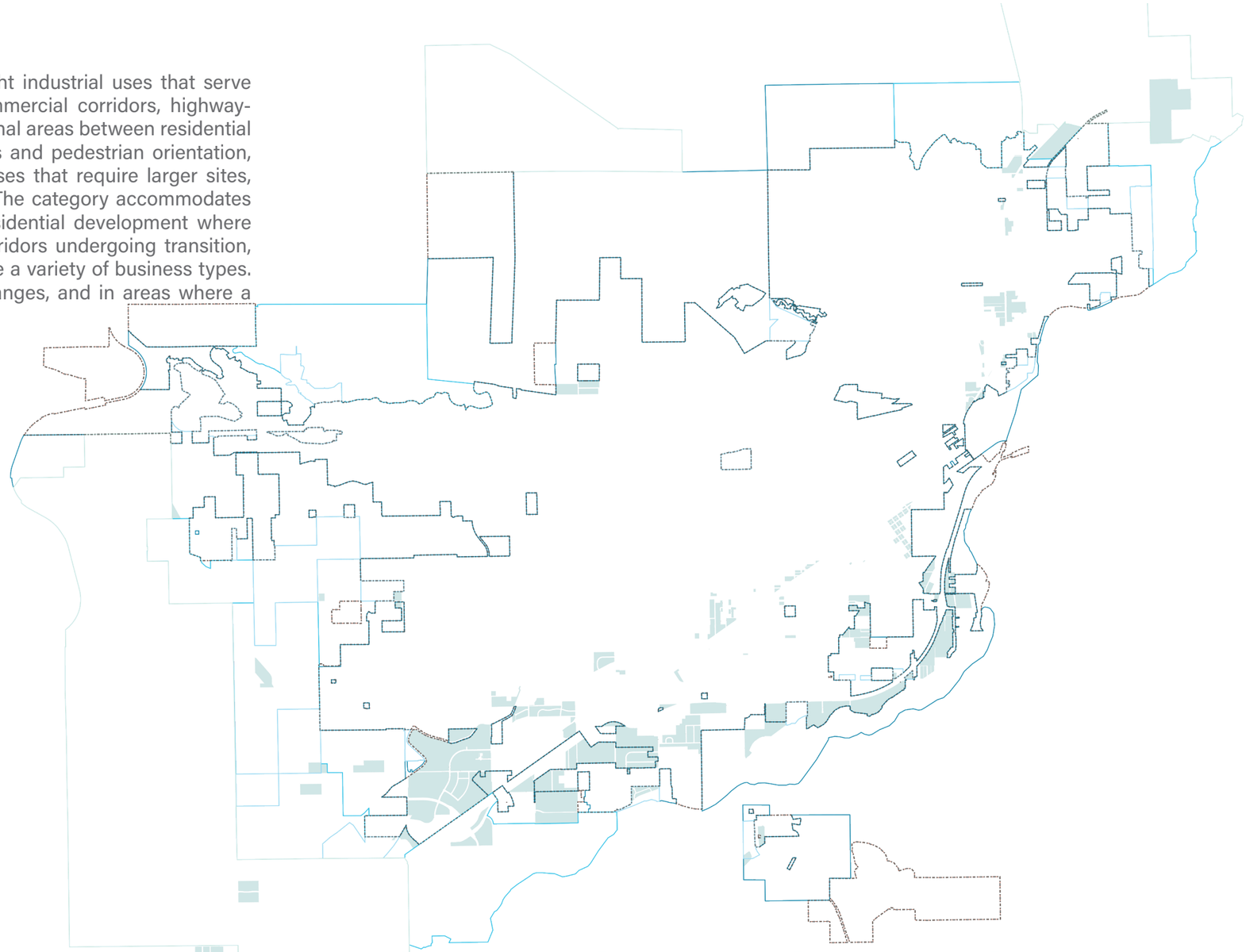
Commercial Mixed encompasses a diverse range of commercial and light industrial uses that serve both local and regional markets. This category includes traditional commercial corridors, highway-oriented commercial development, service commercial areas, and transitional areas between residential and industrial uses. Unlike Urban Nodes which emphasize a mix of uses and pedestrian orientation, Commercial Mixed areas are primarily auto-oriented and may include uses that require larger sites, outdoor storage, or are less compatible with residential neighborhoods. The category accommodates retail, office, service, and light industrial uses, as well as supporting residential development where appropriate. Commercial Mixed areas may include older commercial corridors undergoing transition, new highway-oriented development, or flex spaces that can accommodate a variety of business types. This category is appropriate along major arterials, near highway interchanges, and in areas where a buffer between residential and industrial uses is needed.

PRIMARY USES & BUILDING TYPES

- Retail stores and shopping centers
- Restaurants and bars
- Professional and business offices
- Hotels and motels
- Service commercial and contractor shops
- Self-storage facilities
- Wholesale and distribution
- Light manufacturing
- Flex space and business parks

SECONDARY USES & BUILDING TYPES

- Multifamily residential
- Automobile sales and service
- Gas stations and convenience stores
- Outdoor recreation retail (RV sales, boat sales, sporting goods)
- Fitness centers and recreational facilities
- Renewable energy facilities

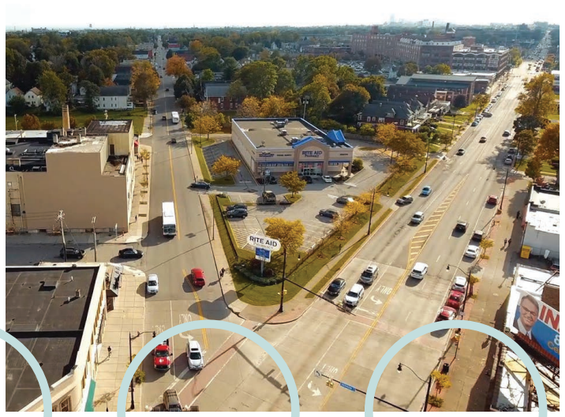


PLACETYPE FEATURES

Density	Where residential is included, densities should be 12 dwelling units per acre or greater.
Lot Size	Lot sizes are flexible, generally 5,000 sq ft or larger.
Building Height	Building heights are typically up to 45 feet (4 stories), with the potential for taller buildings (up to 60 feet).
Setbacks	Setbacks are flexible, but should include deeper buffers (e.g., 20 feet) when adjacent to residential areas.
Character	Encourage landscaping to soften the auto-oriented character of these areas, particularly along street frontages.
Buffering	A robust landscape buffer with a screening wall or fence is a key policy where these areas abut residential zones.
Parking	Policy supports providing adequate on-site parking for a mix of uses. Parking lots should include landscaping to break up large expanses of pavement.
Miscellaneous	Any outdoor storage areas should be screened from public view.

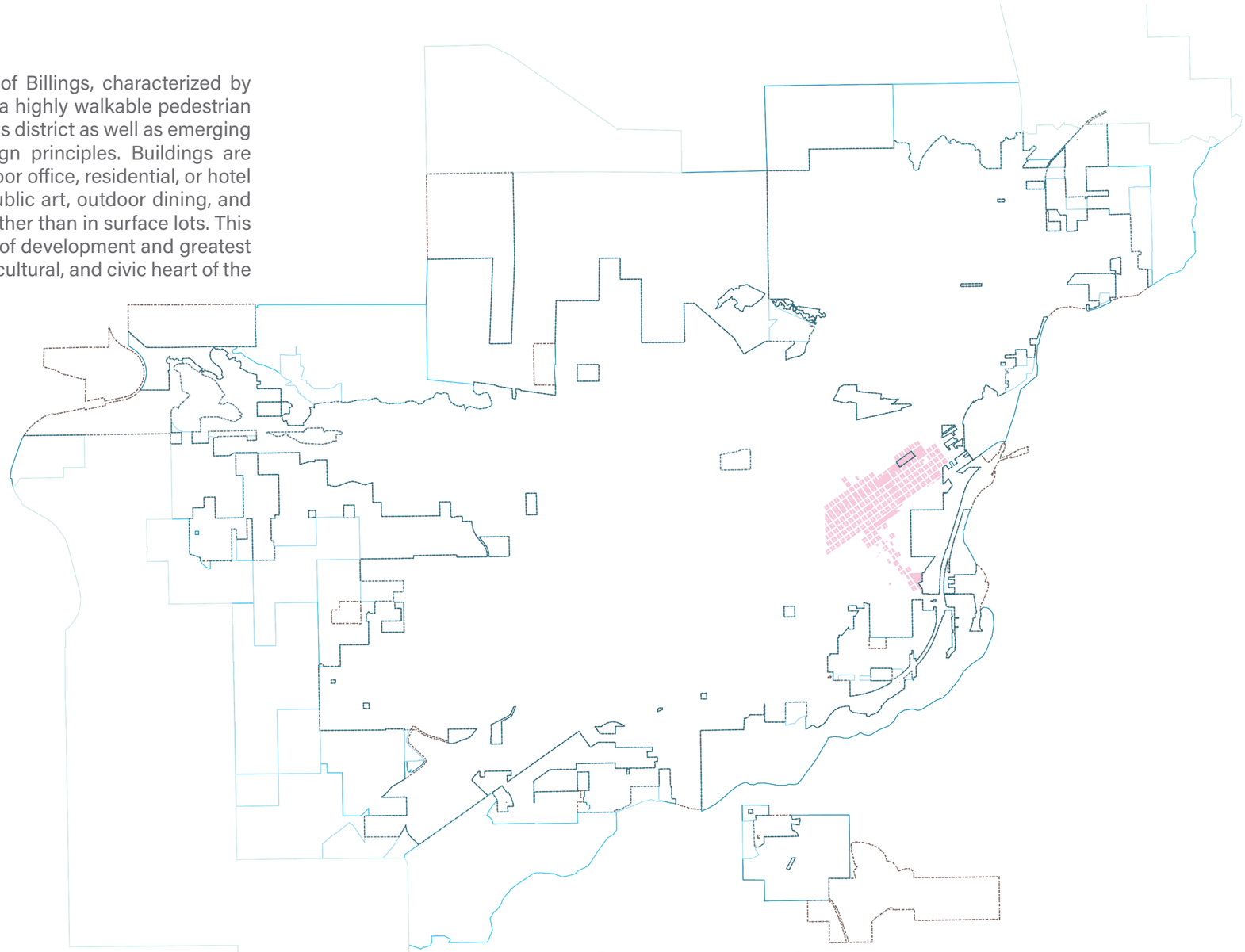
MOBILITY & CONNECTIVITY

- These areas are typically located on collector or arterial streets with a focus on managing access to minimize traffic conflicts.
- Sidewalks are required along all street frontages.
- Internal pedestrian connections should link buildings to transit stops.
- Transit service should be provided along major corridors.



DOWNTOWN URBAN

Downtown Urban represents the historic and contemporary urban core of Billings, characterized by multi-story buildings built to the sidewalk, a fine-grained mix of uses, and a highly walkable pedestrian environment. This category encompasses the traditional downtown business district as well as emerging urban neighborhoods and mixed-use districts that embody urban design principles. Buildings are predominantly multi-story with ground-floor commercial uses and upper-floor office, residential, or hotel uses. The public realm is emphasized with wide sidewalks, street trees, public art, outdoor dining, and gathering spaces. Parking is provided primarily in structures or on-street rather than in surface lots. This category is appropriate for the downtown core where the highest intensity of development and greatest diversity of uses is desired. Downtown Urban areas serve as the economic, cultural, and civic heart of the community.



PRIMARY USES & BUILDING TYPES

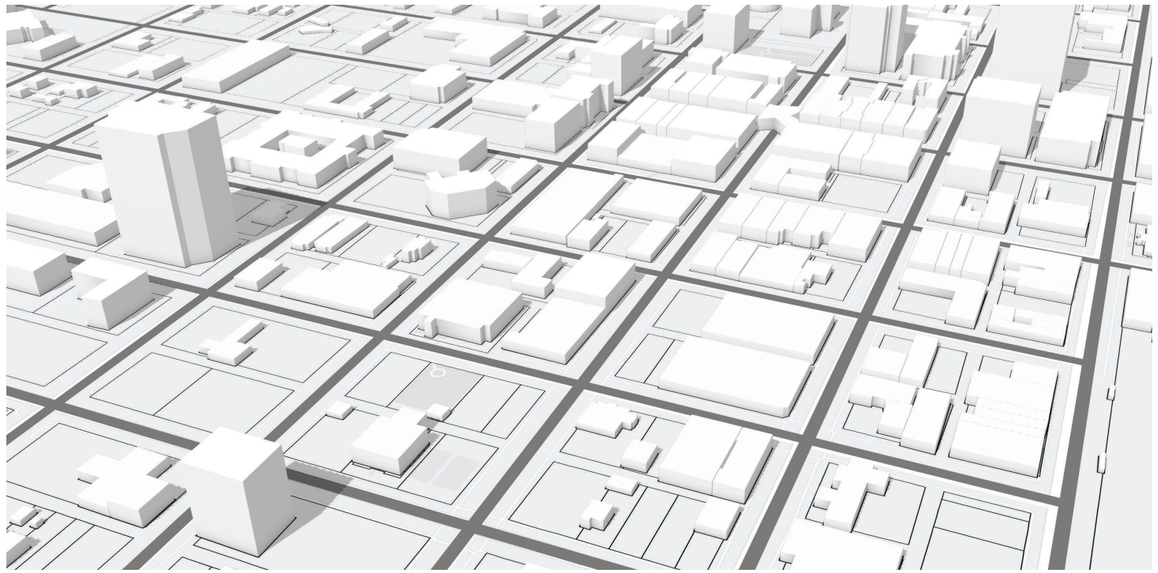
- Mixed-use buildings (retail/office/residential)
- Multi-story office buildings
- High-density residential (apartments, condominiums, lofts)
- Hotels and conference facilities
- Restaurants, cafes, and bars
- Retail and boutique shops
- Cultural facilitie, civic and government buildings
- Financial institutions

SECONDARY USES & BUILDING TYPES

- Entertainment venues
- Medical and dental offices
- Coworking and maker spaces
- Public markets and food halls
- Public plazas and parks
- Transit stations and mobility hubs
- Structured parking facilities
- Urban agriculture (rooftop gardens, vertical farms)

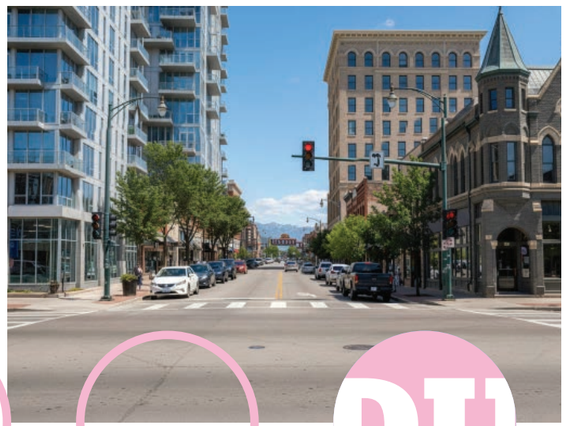
PLACETYPE FEATURES

Density	This category supports the highest residential densities in the city, starting at 16 dwelling units per acre with no maximum.
Lot Size	There is no minimum lot size; consolidation of lots is encouraged.
Building Height	Building heights are generally in the 6-8 story range (up to 75 feet), with the potential for taller buildings without height restrictions.
Setbacks	Buildings must be built directly to the sidewalk (zero-foot setback) to create a continuous urban street wall.
Character	Site design policy focuses on the quality of the public realm. Instead of traditional landscaping, encourage the use of street trees in grates, planters, green walls, and rooftop gardens.
Buffering	Where this category abuts lower-density residential zones, a landscape buffer should be provided to ensure a graceful transition.
Parking	Policy strongly encourages shared, structured parking. Surface parking is discouraged. On-street parking is a valued resource.
Miscellaneous	Promote the use of innovative green infrastructure, such as underground detention and green roofs. Wide sidewalks are essential, furnished with benches, bike racks, and public art.



MOBILITY & CONNECTIVITY

- The highest priority is to create a safe, comfortable, and interesting pedestrian environment.
- The street network should feature complete streets with protected bike lanes and transit priority measures.
- Downtown should be the hub of the regional transit network.
- Support for bike share and scooter share facilities is encouraged.



EMPLOYMENT & INDUSTRIAL

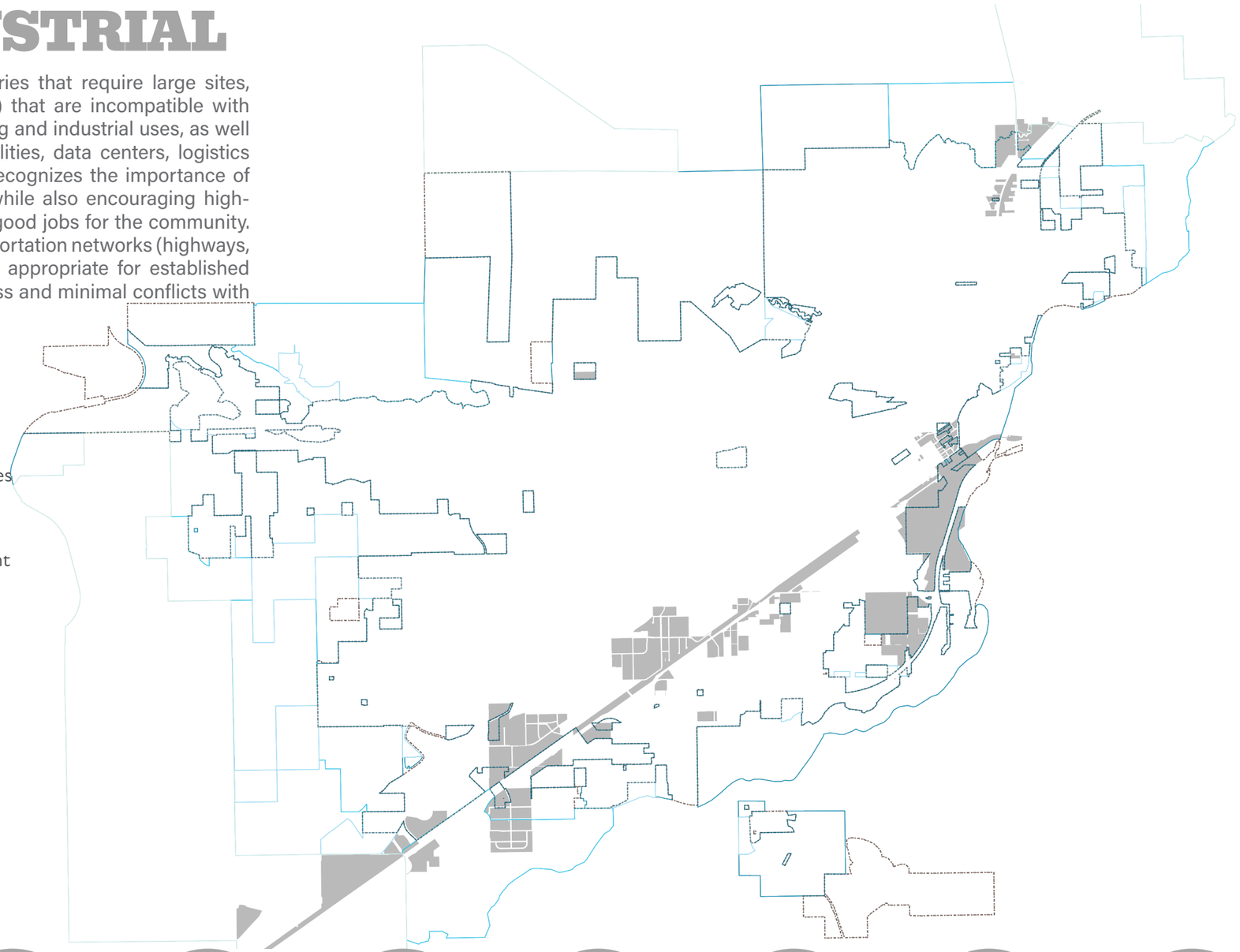
Employment & Industrial areas are dedicated to businesses and industries that require large sites, specialized infrastructure, or generate impacts (noise, traffic, odors, etc.) that are incompatible with residential neighborhoods. This category includes traditional manufacturing and industrial uses, as well as modern employment centers such as research and development facilities, data centers, logistics and distribution centers, and energy production facilities. The category recognizes the importance of preserving industrial land for economic development and job creation, while also encouraging high-quality development that minimizes environmental impacts and provides good jobs for the community. Employment & Industrial areas should be located with good access to transportation networks (highways, rail, air) and should be buffered from residential areas. This category is appropriate for established industrial areas, new business parks, and locations with good freight access and minimal conflicts with residential uses.

PRIMARY USES & BUILDING TYPES

- Manufacturing, production, and processing
- Warehousing, distribution, logistics, and freight operations
- Research, development, laboratories, and technology/data facilities
- Construction, contractor yards, equipment storage, and outdoor storage areas
- Wholesale trade, industrial sales, and recycling/waste management

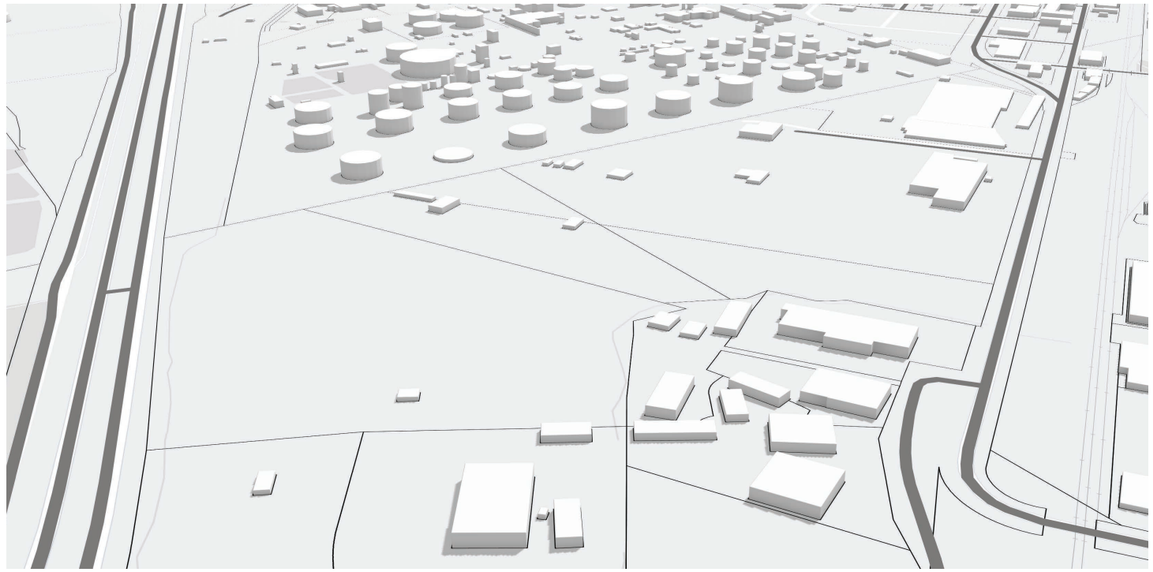
SECONDARY USES & BUILDING TYPES

- Office and administrative support spaces
- Flex/light industrial, maker spaces, and artisan production
- Breweries, wineries, and distilleries (with tasting rooms)
- Indoor recreation and training/educational facilities
- Energy production and infrastructure
- Vehicle storage, truck stops, and fleet services
- Employee amenities and limited accessory retail



PLACETYPE FEATURES

Density	Residential uses are generally not appropriate in this category.
Lot Size	Lots are typically large, 10,000 sq ft or more, to accommodate industrial operations.
Building Height	Building heights are generally up to 70 feet, with flexibility for taller structures required for specific industrial processes.
Setbacks	Generous setbacks are required, particularly a deep buffer (e.g., 20 feet) when adjacent to residential zones.
Character	Encourage landscaping along street frontages and adjacent to residential areas to screen industrial activities and improve visual character.
Buffering	A substantial, densely planted landscape buffer is a key policy to mitigate impacts on adjacent residential zones.
Parking	Policy supports providing adequate on-site parking for employees and fleet vehicles, as well as safe and efficient loading areas.
Miscellaneous	All outdoor storage must be screened from public view.

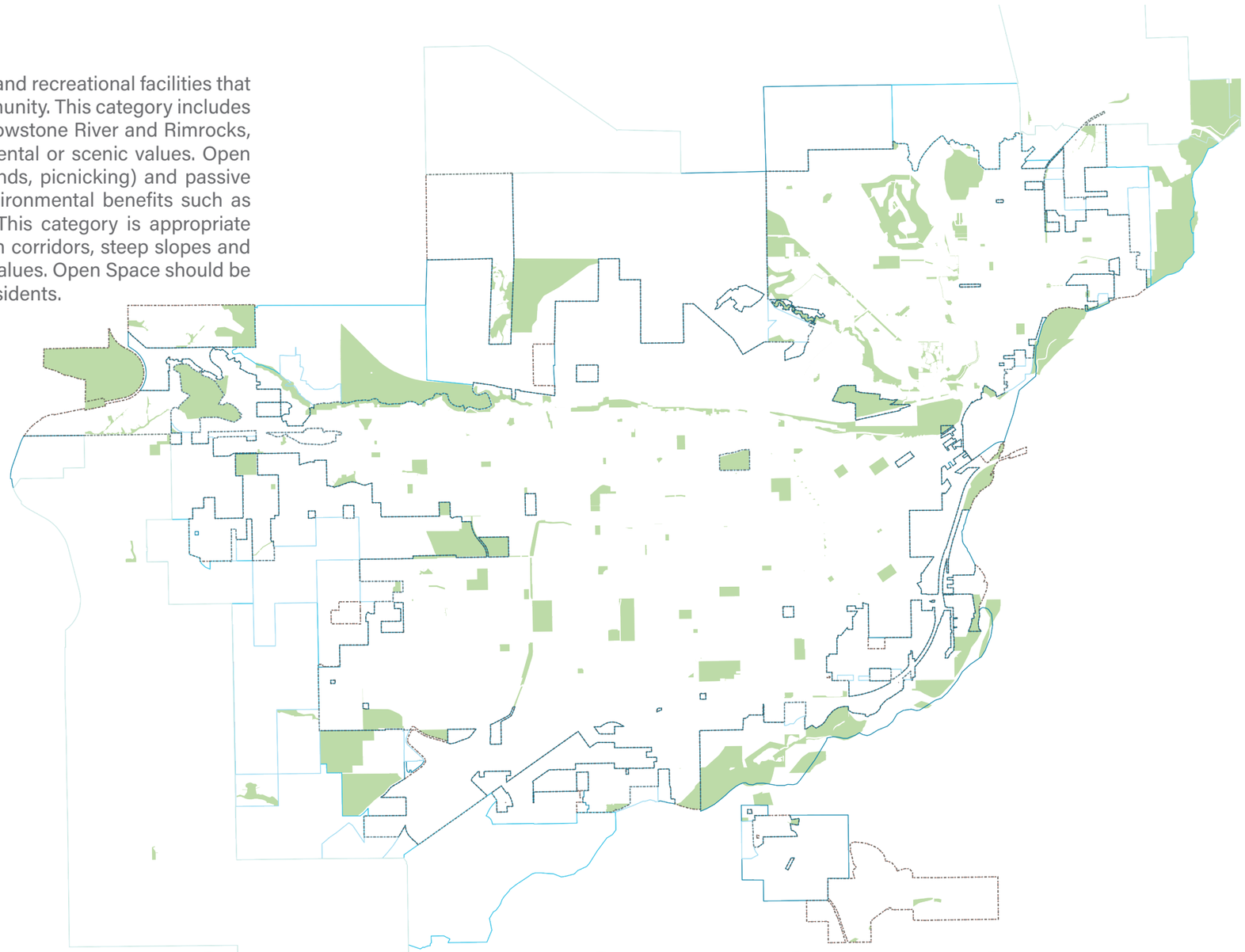


MOBILITY & CONNECTIVITY

- These areas must have excellent access to the regional transportation network, including highways, rail, and air.
- The street network should be designed to safely accommodate heavy truck traffic.
- Transit service should be provided to major employment centers, especially during peak hours.

OPEN SPACE

Open Space encompasses public parks, natural areas, conservation lands, and recreational facilities that provide environmental, recreational, and quality-of-life benefits to the community. This category includes regional parks with sports fields and facilities, natural areas along the Yellowstone River and Rimrocks, trail corridors, and sensitive lands that should be preserved for environmental or scenic values. Open Space areas provide opportunities for active recreation (sports, playgrounds, picnicking) and passive recreation (walking, wildlife viewing, nature appreciation), as well as environmental benefits such as stormwater management, wildlife habitat, and air quality improvement. This category is appropriate for public lands dedicated to parks and recreation, floodplains and riparian corridors, steep slopes and geologic hazards, and lands with significant scenic, cultural, or ecological values. Open Space should be distributed throughout the community to provide equitable access to all residents.



PRIMARY USES & BUILDING TYPES

- Parks and open space
- Sports and active recreation facilities
- Natural areas and conservation lands
- Trail systems and corridors

SECONDARY USES & BUILDING TYPES

- Recreation and community facilities
- Specialized recreation features
- Cultural and gathering spaces
- Community agriculture
- Support and operational facilities
- Temporary events and festivals

OS

PLACETYPE FEATURES

Density	Not applicable. Buildings and structures should cover a very small percentage of the site (e.g., less than 5%).
Lot Size	Not applicable.
Building Height	Structures should be low-profile (e.g., under 25-35 feet aside from larger recreational facilities) and subordinate to the natural landscape.
Setbacks	Not applicable.
Character	The primary policy is to preserve and enhance the natural landscape. Encourage the use of native vegetation and habitat restoration.
Buffering	Not applicable.
Parking	Where parking is necessary, the use of pervious surfaces is encouraged, and lots should be well-landscaped.
Miscellaneous	Promote the preservation of natural drainage patterns and the use of green infrastructure.

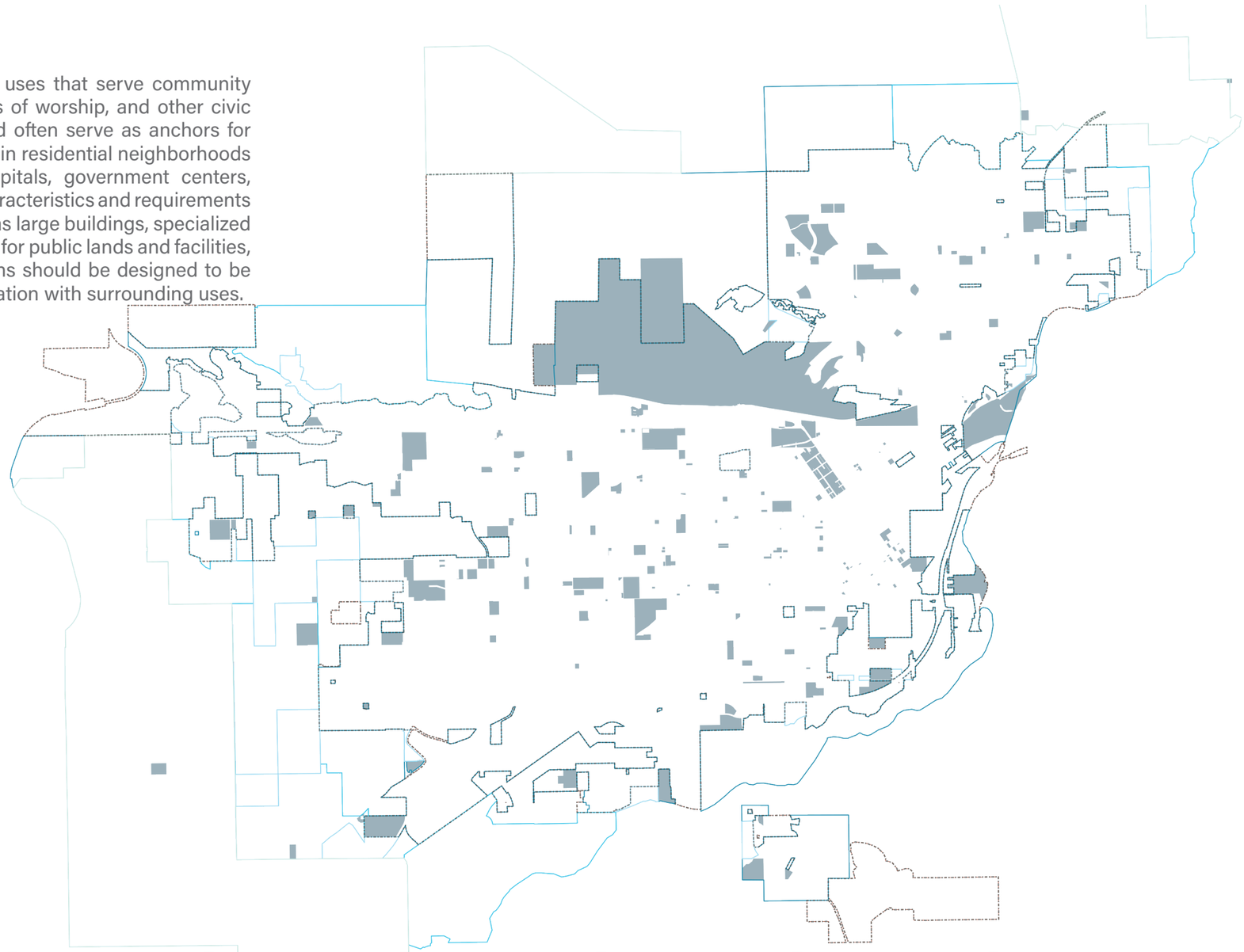
MOBILITY & CONNECTIVITY

- A key policy is to ensure parks and open spaces are well-connected to surrounding neighborhoods via a network of sidewalks and trails.
- Trail systems should connect parks to other community destinations like schools and commercial areas.
- Regional parks should be accessible by transit.

OS

PUBLIC INSTITUTION

Public Institution encompasses a wide range of public and quasi-public uses that serve community needs, including schools, libraries, government facilities, hospitals, places of worship, and other civic and institutional uses. These facilities are essential to community life and often serve as anchors for neighborhoods and activity centers. Public institutions may be located within residential neighborhoods (schools, libraries, fire stations) or in more centralized locations (hospitals, government centers, universities). The category recognizes that institutional uses have unique characteristics and requirements that may not fit within standard residential or commercial categories, such as large buildings, specialized parking needs, and irregular hours of operation. This category is appropriate for public lands and facilities, as well as private institutions that serve public purposes. Public institutions should be designed to be good neighbors, with attention to building scale, parking, traffic, and integration with surrounding uses.



PRIMARY USES & BUILDING TYPES

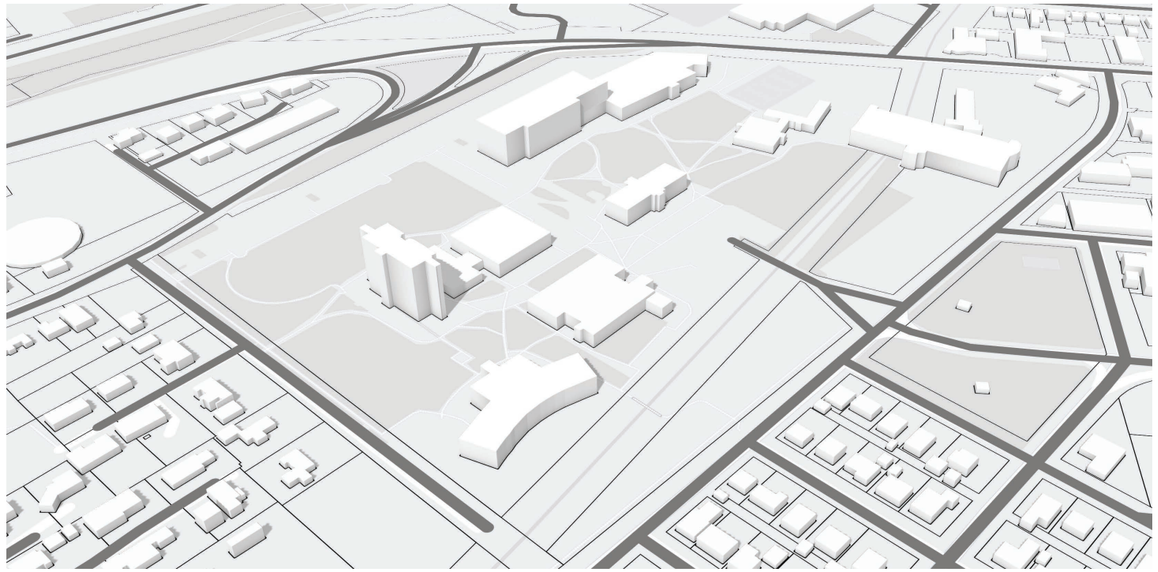
- Educational facilities
- Public safety and emergency services
- Government and civic buildings
- Community and recreation facilities
- Higher education and major institutional uses
- Healthcare facilities

SECONDARY USES & BUILDING TYPES

- Religious, cultural, and civic assembly uses
- Cemeteries and memorial park
- Utility and infrastructure facilities
- Support and accessory uses
- Public safety training and associated outdoor recreation areas

PLACETYPE FEATURES

Density	Varies widely based on the specific use.
Lot Size	Varies widely based on the specific use.
Building Height	Building heights are generally up to 45 feet, but can be taller for major institutions like hospitals or universities (up to 50 feet) with appropriate design and buffering.
Setbacks	Setbacks should be designed to ensure compatibility with the surrounding context, with deeper buffers provided next to residential areas.
Character	Encourage high-quality site design that creates a welcoming and attractive campus-like environment.
Buffering	A landscape buffer is a key policy to ensure compatibility with adjacent residential uses.
Parking	Policy supports providing adequate on-site parking to serve the institution's needs while minimizing impacts on surrounding neighborhoods.
Miscellaneous	Not applicable.



MOBILITY & CONNECTIVITY

- Institutions should have safe and convenient pedestrian and bicycle access from the surrounding community.
- Major institutions should be served by transit.
- For schools, providing safe routes for walking and biking is a high priority.

BILLINGS 2045

FROM PLAN TO REALITY

PLAN IMPLEMENTATION

A comprehensive land use plan is a community's blueprint for the future, establishing a shared, community-wide vision and defining the goals that will guide physical, economic, and social growth and investment over time. To be truly impactful, however, a plan requires a robust implementation strategy that turns ideas into action.

National best practices in comprehensive planning emphasize that implementation should not be an afterthought but a central component of the planning process. The American Planning Association and allied professional organizations highlight several key principles for effective implementation:

- **Action-Oriented Matrices.** Translating broad goals into specific, measurable, achievable, relevant, and time-bound (SMART) objectives. An implementation matrix is the standard tool for organizing these actions, identifying top priorities, responsible parties, timelines, and measures of success.
- **Integration with Capital Improvements.** A community's capital improvement program creates a vital bridge between the comprehensive plan and the actual construction of public improvements. Aligning the City of Billings' CIP with the land use plan and future land use map ensures that infrastructure investments support the desired growth patterns, prioritizing utility upgrades in areas targeted for infill development or annexation.
- **Regulatory Updates.** Recognizing that private sector investment drives much of a city's physical change, the plan must guide how the community vision will be translated into updates to zoning and subdivision regulations.
- **Continuous Monitoring and Evaluation.** Establishing clear metrics to track progress allows the City to adjust strategies as conditions change. Annual reporting and regular comprehensive reviews (such as MLUPA's five-year requirement) ensures the plan stays relevant and accountable.

The implementation phase bridges the gap between long-term aspirations and tangible results. Without a structured implementation framework, local governments risk losing the momentum generated during the public engagement process, leaving plans to fall short in achieving their intended outcomes due to insufficient funding, lack of political will, or unclear responsibilities. Establishing a clear, predictable, and measurable implementation strategy ensures that the goals established in the Billings 2045 Land Use Plan are systematically achieved through coordinated public and private actions.

REGULATORY CONTEXT: THE MONTANA LAND USE PLANNING ACT (MLUPA)

The adoption of the Montana Land Use Planning Act (MLUPA) in 2023 fundamentally shifted the planning paradigm for qualifying municipalities in the state, including the City of Billings. MLUPA was designed to replace outdated, inconsistent, and duplicative land use statutes with a more streamlined and predictable framework. For Billings, which meets the population threshold of over 5,000 residents within a county of over 70,000 residents, compliance with MLUPA is mandatory and carries specific statutory deadlines.

Under MLUPA, the land use plan serves as the foundational document guiding subsequent regulatory and capital investment decisions. Specifically, Montana Code Annotated (MCA) § 76-25-216 mandates that the land use plan must include an implementation section that "establishes meaningful and predictable implementation measures for the use and development of land within the jurisdiction based on the contents of the land use plan and future land use map".

To comply with MLUPA, the Billings 2045 Land Use Plan implementation framework has been based on the following:

1. **Regulatory Analysis:** As part of the planning process, the City's development regulations, specifically the zoning and subdivision codes, were analyzed for consistency with plan goals and alignment with future growth potential. Specifically, the zoning regulations informed the development of future placetype classifications, and inconsistencies between existing zoning districts and the intent of established placetypes have been addressed through recommended changes to the zoning specifically in this implementation strategy. Furthermore, the City's zoning and subdivision application and review processes, including public engagement methods and requirements, were evaluated to ensure conformance with the required changes in statute; recommendations on these changes have also been outlined in the strategy below.
2. **Infrastructure Alignment:** When thinking about future growth potential for Billings over the next twenty years, it was imperative that future infrastructure investment and necessary improvements were considered as part of the growth equation. This plan and implementation strategy builds upon past and ongoing efforts, including the City's long-range transportation plan, the transportation corridor planning process that is still underway, the West End and Heights neighborhood planning efforts, and inputs from utility and service providers engaged throughout this process. Priority additions and amendments to the City's capital improvements plan have been identified, to align with the future land use map and policy objectives set forth in this plan.
3. **Future Expansion:** Where and how the City of Billings grows was a key concern among stakeholders and the public. This implementation strategy highlights future priorities areas for growth, supported by the future land use map and aligned with infrastructure expansion and improvements necessary to support growth out, as well as up. Balancing horizontal growth with urban infill is a key consideration of this plan, based on community input throughout the process and sound fiscal and service delivery considerations of the City, and the implementation strategy set forth in the following pages seeks to articulate that balance and provide a road map for success., and the implementation strategy set forth in the following pages seeks to articulate that balance and provide a road map for success.

INTEGRATING COMMUNITY PRIORITIES INTO IMPLEMENTATION

The public outreach process for the Billings 2045 Land Use Plan revealed strong community consensus around several key issues:

Housing Affordability and Choice. With the median home sale price increasing by over 50% between 2018 and 2023, a current deficit of 10,000 residential units, and projected demand for 26,200 units by 2045 to address growing population and unmet need, implementation actions must prioritize regulatory reforms that reduce barriers to housing production. Implementation actions include zoning amendments to allow diverse housing types and incentivizing infill development, in alignment with the future land use map, are two critical strategies and reflected in public comments received during the process.

Managing Growth and Infrastructure. Public feedback highlighted concerns about urban sprawl, loss of agricultural land, and the fiscal strain of expanding infrastructure to the west and north. Implementation strategies balance capital improvements in support of existing neighborhoods and establish clear policies for the logical, phased extension of services.

Parks, Recreation, and Open Space. The community expressed a strong desire for enhanced trail connectivity, preservation of natural areas like the Rims and the Yellowstone River waterfront, and equitable access to parks. The implementation matrix includes specific capital projects for trail completion and regulatory tools for open space dedication in new developments.

The implementation framework has been organized in alignment with these issues, as expressed by the plan's vision statement introduced in Chapter 1. Implementation strategies have been organized and prioritized according to the following community values:

- Managed Growth and Fiscal Resilience
- Enhanced Connectivity
- Expanded Housing Opportunity
- Equitable Access and Participation
- Protection of Community Assets
- Community Identity and Vitality

This structure has been put in place to ensure that specific policy and regulatory actions reinforce the goals and interests expressed by the community.

IMPLEMENTATION ACTION MATRIX

The core of this strategy is the comprehensive Implementation Action Matrix. This matrix categorizes actions according to the community values expressed above and assigns specific parameters to each action. To ensure the City's efforts are both strategic and impactful, the implementation matrix is centered around a clear, priority-based framework. This approach moves beyond a simple list of goals to create a dynamic action plan that distinguishes between immediate needs, intermediate objectives, and long-term ambitions. It provides a clear sequence of operations, allowing the City to focus resources, coordinate efforts, and build momentum over the life cycle of this plan.

Matrix Components:

- Action Item: A specific, actionable task (e.g., "Amend zoning code to allow for middle housing types by-right in residential zones").
- Plan Goal/Theme Alignment: The overarching goal the action supports (e.g., "Enhanced Connectivity").
- Action Type: Categorization of the tool used (e.g., Regulatory, Capital Investment, Programmatic, Partnership/Study).
- Lead Department/Agency: The entity primarily responsible for executing the action (e.g., Planning & Community Services, Public Works, Parks & Recreation).
- Supporting Partners: Other city departments, external agencies, or community organizations that are critical partners for successful implementation.
- Timeframe:
  - ◇ Immediate/Short-Term (1-3 years): Actions required for immediate MLUPA compliance, such as zoning updates.
  - ◇ Medium-Term (4-7 years): Actions requiring additional study, funding acquisition, or CIP integration.
  - ◇ Long-Term (8+ years): Complex, large-scale infrastructure projects or ongoing programmatic efforts.
  - ◇ Ongoing: Continuous administrative or operational practices.
- Potential Funding Sources: General fund, specific grants, impact fees, or public-private partnerships.
- Measures of Success: A barometer for the City to self-evaluate annually, confirm a strategy has been successfully implemented, and gauge overall impact.

Plan Theme: Expand housing options and affordability to support residents across incomes, ages, and household types.

ACTION ITEM	ACTION TYPE	LEAD DEPARTMENT / AGENCY	SUPPORTING PARTNERS	TIMEFRAME	POTENTIAL FUNDING SOURCES	MEASURES OF SUCCESS
4.1 Allow "Missing Middle" Housing By-Right: Amend the zoning code to permit diverse housing types (e.g., duplexes, triplexes, townhomes, cottage courts) by-right in residential and mixed-use zones to increase supply and variety.	Regulatory	Planning & Community Services	City Council	Immediate (1-3 yrs)	General Fund, Countywide Planning Levy, Local grant programs and resources	Number of missing middle units permitted annually.
4.2 Streamline Development Review for Infill: Create an expedited permitting process and reduce regulatory barriers (such as parking minimums) for infill housing and mixed-use projects in the downtown core and designated activity centers.	Regulatory / Programmatic	Planning & Community Services	Public Works, City Council, Building Division, Administration	Short-Term (1-3 yrs)	General Fund, Possible Federal ProHousing Grant	Reduction in average permitting time for infill projects.
4.3 Promote Accessory Dwelling Units (ADUs): Update regulations to remove barriers to ADU construction (e.g., owner-occupancy requirements, excessive setbacks) and develop pre-approved ADU building plans to reduce costs for homeowners.	Regulatory / Programmatic	Planning & Community Services	Building Division	Short-Term (1-3 yrs)	General Fund, Possible Federal ProHousing Grant	Number of ADUs permitted annually.
4.4 Support Affordable Housing Development: Partner with non-profit developers and housing authorities to identify city-owned land suitable for affordable housing and leverage tools like Tax Increment Financing (TIF) to subsidize development costs.	Partnership / Capital Investment	Parks and Recreation, Administration, City Council, Planning & Community Services	Housing Authority, Economic Development	Medium-Term (4-7 yrs)	TIF, CDBG, HOME Funds, MT Community Reinvestment Plan (MCRP)	Number of deed-restricted affordable units created.

4.1 IMPLEMENTATION TABLE EXAMPLE

MONITORING, EVALUATION, AND PLAN MAINTENANCE

The most effective plans are treated as living documents. By regularly monitoring progress, assessing the effectiveness of certain strategies, and shifting course if conditions warrant a reframing of priorities, the City will ensure that the Billings 2045 Land Use Plan remains a relevant and effective tool for years to come. The following measures are recommended to support this approach:

Annual Progress Report: Produce an annual, public-facing report, to present to the Planning Commission and the City Council, detailing which action items have been completed, which are underway, and the status of key performance indicators (e.g., number of housing units permitted by type, acres of parkland added). Highlight specific actions or strategies that should be added, or those that may need reprioritization based on evolving conditions.

The Five-Year Review: Establish set protocols for the mandatory MLUPA five-year review by the Planning Commission. This will include procedures for assessing new or increased impacts on local facilities, natural resources, and hazards, and determining whether a formal update to the land use plan or FLUM is necessary.

Amendment Procedures: Adopt clear guidelines on how the plan and FLUM can be amended outside of the five-year review cycle, to respond to unforeseen opportunities or challenges.

Plan Theme: Plan and manage growth to align fiscal sustainability with long-term community goals.

ACTION ITEM	ACTION TYPE	LEAD DEPARTMENT / AGENCY	SUPPORTING PARTNERS	TIMEFRAME	POTENTIAL FUNDING SOURCES	MEASURES OF SUCCESS
1.1 Conduct a Comprehensive Zoning Code Update: Amend the zoning ordinance to align with the Future Land Use Map (FLUM) and placetype classifications, prioritizing infill development and mixed-use areas to maximize infrastructure efficiency.	Regulatory	Planning & Community Services	City Council, Interim Planning Commission/ Planning Commission	Immediate (1-3 yrs)	Countywide Planning Levy, General Fund, Planning Grants	Adoption of zoning code amendments; percentage of land zoned for mixed-use and infill.
1.2 Update Subdivision Regulations: Revise subdivision application and review processes to conform with MLUPA requirements and ensure new developments align with the city's infrastructure capacity.	Regulatory	Planning & Community Services	Public Works, City Council, Interim Planning Commission/Planning Commission	Immediate (1-3 yrs)	Countywide Planning Levy, General Fund	Adoption of updated subdivision regulations.

Plan Theme: Align land use decisions with the capacity and long-term sustainability of infrastructure, public services, and facilities.

ACTION ITEM	ACTION TYPE	LEAD DEPARTMENT / AGENCY	SUPPORTING PARTNERS	TIME-FRAME	POTENTIAL FUNDING SOURCES	MEASURES OF SUCCESS
2.1 Integrate FLUM with Capital Improvements Program (CIP): Amend the CIP scoring criteria to prioritize infrastructure investments (water, sewer, stormwater, streets) in areas targeted for infill, redevelopment, and planned annexation according to the FLUM.	Capital Investment	Public Works	Planning & Community Services, Finance, City Council	Short-Term (1-3 yrs)	Enterprise Funds, Impact Fees	Revised CIP scoring matrix adopted; percentage of CIP funds directed to infill areas.
2.4 Establish Clear Infrastructure Sequencing Policies: Develop policies for the logical, phased extension of municipal services in the West End and Heights to prevent fragmented growth and reduce long-term maintenance costs.	Policy / Regulatory	Public Works	Planning & Community Services, City Council	Medium-Term (4-7 yrs)	General Fund	Update infrastructure extension policy; reduction in leapfrog development.
2.5 Evaluate and Update Impact Fees: Conduct a comprehensive review of development impact fees to ensure growth pays its proportionate share of infrastructure expansion costs.	Programmatic / Study	Finance	Administration, City Council, Public Works, Planning & Community Services	Medium-Term (4-7 yrs)	General Fund, Impact Fee Revenue	Updated impact fee schedule and expand program.

Plan Theme: Support a transportation system that improves connectivity, safety, and access through multiple travel options.

ACTION ITEM	ACTION TYPE	LEAD DEPARTMENT / AGENCY	SUPPORTING PARTNERS	TIME-FRAME	POTENTIAL FUNDING SOURCES	MEASURES OF SUCCESS
3.1 Continue Implementation of "Complete Streets" Design Standards: Continue application of street design standards that safely accommodate pedestrians, cyclists, transit users, and motorists, particularly on major corridors and in growing subdivisions.	Regulatory	Public Works	Planning & Community Services, MPO, MET Transit	Short-Term (1-3 yrs)	General Fund, Enterprise Funds, State/Federal Grants	Maintain and Update Complete Streets Policy; miles of complete streets constructed.
3.2 Complete the Marathon Loop and Regional Trail Gaps: Prioritize funding and construction to close gaps in the 53-mile regional trail network, improving north-south connectivity and safe routes to schools and parks.	Capital Investment	Parks & Recreation	Public Works, Planning & Community Services, MPO, School Districts	Medium-Term (4-7 yrs)	CIP, Federal/State/Local Grants, Philanthropy	Miles of new trail constructed; completion of the Marathon Loop.
3.3 Expand Transit Service and Infrastructure: Work with MET Transit to expand bus service routes, improve stop amenities, and evaluate long-term high-capacity transit options along key mixed-use corridors.	Capital Investment / Programmatic	MET Transit	Public Works, Planning & Community Services, MPO	Medium-Term (4-7 yrs)	Federal Transit Grants, CMAQ Funds, Transit Levy	Increased transit ridership; number of improved transit stops.
3.4 Enhance Pedestrian Safety at Major Intersections: Continue program to identify and upgrade high-risk intersections with improved crosswalks, pedestrian refuge islands, and traffic calming measures to reduce barriers to active transportation.	Capital Investment	Public Works	Planning & Community Services, MPO, MET Transit	Ongoing	CIP, SRTS Program, Safe Streets For All Grant, Highway Safety Grants	Reduction in pedestrian/cyclist accidents; number of intersections improved.

Plan Theme: Expand housing options and affordability to support residents across incomes, ages, and household types.

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Plan Theme: Promote equitable access to services and reinvestment in existing neighborhoods to support quality of life citywide.

ACTION ITEM	ACTION TYPE	LEAD DEPARTMENT / AGENCY	SUPPORTING PARTNERS	TIMEFRAME	POTENTIAL FUNDING SOURCES	MEASURES OF SUCCESS
5.1 Prioritize Neighborhood Park Improvements in Underserved Areas: Direct parks funding to improve existing neighborhood parks and address service gaps, particularly in the Heights and West End, before acquiring new undeveloped land.	Capital Investment	Parks & Recreation	Public Works, Planning and Community Services, City Council	Short-Term (1-3 yrs)	CIP, Park District Assessments, General Fund (Parks Budget), CDBG (CPTED Program)	Number of park improvement projects completed in target areas.
5.2 Complete Development of an Indoor Recreation and Wellness Center: Finish construction and plan for future components of the multi-use indoor recreation facility at Amend Recreation Campus to address deficit in year-round recreation space.	Capital Investment	Parks & Recreation	City Administration, Community Partners	Ongoing	TIF, Public-Private Partnerships, Tourism BID, General Fund (Parks Budget)	Facility constructed, open to the public, and ongoing added programing and elements.
5.3 Strengthen Neighborhood-Level Engagement: Evaluate communication channels and support for Neighborhood Task Forces to ensure consistent, equitable input for ongoing land use and capital investment decisions.	Programmatic	Planning & Community Services	Planning & Community Services, City Administration	Ongoing	General Fund	Number of active neighborhood task forces; frequency of engagement events.
5.4 Coordinate Planning with School Districts: Establish a formal working group with local school districts (beyond current City-County, School Dist. Meetings) to align future school siting and facility planning with the Future Land Use Map and anticipated residential growth patterns.	Partnership	Planning & Community Services	City Council, Planning Commission, School Districts	Short-Term (1-3 yrs)	N/A	Execution of a joint planning memorandum of understanding.

Plan Theme: Protect natural resources and integrate parks, open space, and environmental considerations into growth decisions.

ACTION ITEM	ACTION TYPE	LEAD DEPARTMENT / AGENCY	SUPPORTING PARTNERS	TIMEFRAME	POTENTIAL FUNDING SOURCES	MEASURES OF SUCCESS
6.1 Reform Parkland Dedication Standards: Update subdivision regulations to explicitly disqualify undevelopable lands (steep slopes, stormwater ponds) from meeting parkland dedication requirements, and require basic improvements (irrigation, seeding) upon dedication.	Regulatory	Planning & Community Services	Parks & Recreation, Planning Commission, City Council	Immediate (1-3 yrs)	General Fund	Adoption of revised parkland dedication ordinance.
6.2 Establish a Sustainable Parks Funding Strategy: Explore and implement a dedicated, long-term funding source (e.g., expanded park district, local option tax, or conservation foundation) for the perpetual maintenance of parks, trails, and open space.	Policy / Programmatic	Finance	Parks & Recreation, City Council	Medium-Term (4-7 yrs)	New Revenue Mechanisms	Adoption of a dedicated funding mechanism; increase in parks maintenance budget.
6.3 Protect the Yellowstone River Corridor and Rimrocks: Implement zoning overlays or conservation subdivision standards to protect viewsheds, preserve natural habitats, and manage stormwater runoff near the Rims and the Yellowstone River.	Regulatory	Planning & Community Services	Parks & Recreation, Public Works, Planning Commission, City Council	Medium-Term (4-7 yrs)	General Fund	Acres of sensitive land protected; adoption of conservation overlays.
6.4 Enhance Urban Agriculture and Tree Canopy: Develop zoning provisions that support community gardens and small-scale urban agriculture, and implement a robust urban forestry program to maintain Billings' Tree City USA status and mitigate the urban heat island effect.	Regulatory / Programmatic	Parks & Recreation	Planning & Community Services, Planning Commission, City Council	Ongoing	General Fund, Urban Forestry Grants	Number of community gardens established; net increase in urban tree canopy.

Plan Theme: Reinforce Billings' identity through context-sensitive development, downtown vitality, and distinctive neighborhoods.

ACTION ITEM	ACTION TYPE	LEAD DEPARTMENT / AGENCY	SUPPORTING PARTNERS	TIME-FRAME	POTENTIAL FUNDING SOURCES	MEASURES OF SUCCESS
7.1 Support Downtown Revitalization and Mixed-Use: Utilize Urban Renewal Districts and Tax Increment Financing (TIF) to incentivize commercial and residential reinvestment in the downtown core and historic commercial corridors.	Capital Investment / Programmatic	TIF Districts	Administration, City Council	Ongoing	TIF, Economic Development Grants	Increase in downtown residential population; reduction in commercial vacancy rates.
7.2 Develop Context-Sensitive Design Guidelines: Create design standards for commercial and multifamily developments to ensure new construction respects the historic character and scale of established neighborhoods.	Regulatory	Planning & Community Services	Historic Preservation Board, Building Department	Medium-Term (4-7 yrs)	General Fund	Adoption of design guidelines.
7.3 Promote Arts, Culture, and Placemaking: Integrate public art, wayfinding signage, and community gathering spaces into public infrastructure projects and private developments to strengthen neighborhood identity.	Programmatic	Planning & Community Services	Parks & Recreation, Public Works, Public Art Board	Ongoing	CIP, Philanthropy, Grants	Number of public art installations; implementation of a unified wayfinding system.
7.4 Foster Regional Economic Diversification: Align land use planning with economic development strategies to identify and zone appropriate sites for emerging industries, reducing reliance on single sectors and promoting long-term prosperity.	Policy / Partnership	Economic Development	Planning & Community Services	Ongoing	General Fund	Growth in target industry sectors; number of new businesses established.

BILLINGS 2045 APPENDIX

A. Market Analysis & Growth Projections

B. Composite Operating Plan Future Land Use Map

C. FLUM Public Input

A. Market Analysis & Growth Projections

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INTRODUCTION

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PROJECT INTRODUCTION

Billings Land Use Plan & Future Land Use Map

- In 2023, the Montana Legislature adopted the Montana Land Use Planning Act (MLUPA), which requires certain Montana cities to adopt a new land use plan and update local zoning and subdivision regulations. Cities have up to three years from the effective date (May 2023) of the MLUPA to adopt new regulations.
- In April 2025, the City of Billings (the "City") engaged a planning team led by Orion Planning + Design (Orion) with SB Friedman Development Advisors, LLC (SB Friedman) and Kittleson & Associates to develop a citywide land use plan and future land use map in conformance with MLUPA requirements.
- As part of this work, SB Friedman analyzed the city's existing and projected housing needs given anticipated population growth; assessed current and future economic development conditions and opportunities; and evaluated potential market constraints on future development. These analyses will inform the forthcoming City of Billings land use plan and future land use map.

Source: Orion Planning + Design
SB Friedman Development Advisors, LLC

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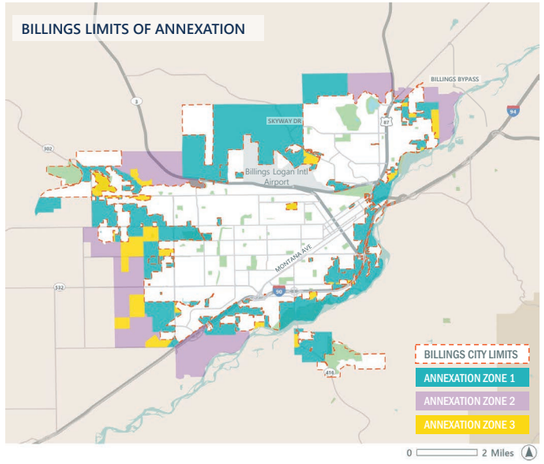
ANNEXATION ZONES

Billings has identified three different types of annexation zones in surrounding Yellowstone County

- Land within Yellowstone County can be incorporated into the city of Billings through annexation. The City's Annexation Policy provides guidance on evaluating potential annexations with a focus on orderly growth, adequate provision of municipal services, and equal benefits to annexed land and existing city land.
- The City's Annexation Policy divides potential annexation areas into three zones:
  - **Zone 1 (City Annexation Petition Area)**. Zone 1 is the primary area in which City Council considers petitions for annexation.
  - **Zone 2 (Long Range Urban Planning Area)**. Zone 2 includes areas that can be considered for inclusion into Zone 1. With certain exceptions, properties cannot be included in Zone 1 without first being in Zone 2.
  - **Zone 3 (County Developed Area).** Zone 3 includes properties developed by the county that are not using municipal services but are adjacent to or near municipally-serviced properties. City Council can consider petitions in Zone 3 as well as Zone 1.



Source: City of Billings Annexation Policy, SB Friedman
SB Friedman Development Advisors, LLC

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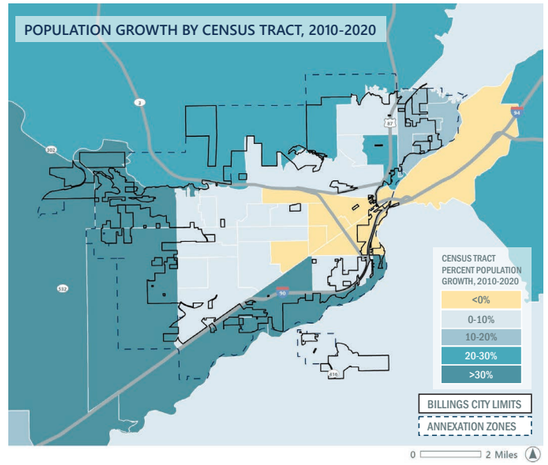
AREA POPULATION CHANGE, 2010-2020

Census tracts at the western edges of Billings experienced up to 95% population growth

- According to the U.S. Census, the population of Yellowstone County was 147,972 in 2010. By 2020, the population increased by 16,759 to 164,731. From 2010 to 2020, the population of Yellowstone County grew at a compound annual growth rate (CAGR) of 1.1%.
- From 2010 to 2020, Billings' population grew by 12.4%. However, population growth was not distributed evenly throughout the city.
- Most areas within the city limits experienced moderate growth between 0 and 10% from 2010 to 2020. The historic core of Billings, including Census tracts overlapping downtown, experienced population decline during this period.
- Areas on the edges of Billings, including Billings Heights and West Billings, grew much more rapidly and saw population increases above 20%. The population in tracts overlapping annexation areas to the west of city limits increased by up to 95%.



Source: SB Friedman, U.S. Decennial Census (2010, 2020)
SB Friedman Development Advisors, LLC

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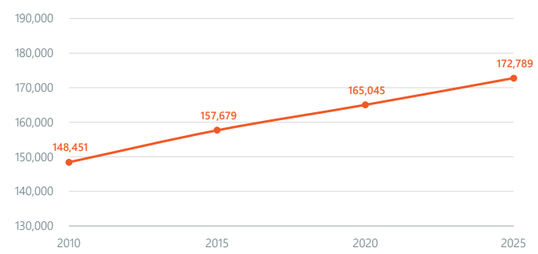
POPULATION PROJECTIONS

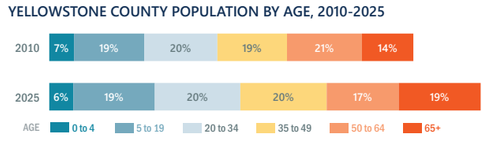
Yellowstone County's population is projected to continue growing, albeit at a slower rate

- Based on estimates published by the Big Sky Economic Development Agency, the 2025 population of Yellowstone County was 172,789. This 2025 population projection reflects an increase of over 24,000 in the span of fifteen years.
  - During stakeholder interviews, interviewees attributed population growth to people moving from outside of Montana in search of a different lifestyle, as well as people moving to Billings from other parts of Montana where the cost of living has increased.
  - According to IRS tax return data, Yellowstone County gained 2,200 households or approximately 4,200 individuals, due to net migration between 2020 and 2022.
- The population of Yellowstone County has aged over the last 15 years. The share of the population that was less than 19 years old was 26% in 2010 and is projected to be 25% in 2025. Meanwhile, the share of the population age 65 and older was 14% in 2010 and is projected to be 19% in 2025.

YELLOWSTONE COUNTY POPULATION AND PROJECTED POPULATION, 2010-2025



YELLOWSTONE COUNTY POPULATION BY AGE, 2010-2025



Source: Big Sky Economic Development Agency, IRS Statistics of Income, Regional Economic Models Incorporated (REMI) compiled by Montana Department of Commerce, SB Friedman
SB Friedman Development Advisors, LLC

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HOUSING

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PRIOR HOUSING STUDIES

Studies identify rising home prices as a challenge for Billings

Recently, several housing studies have assessed local and regional housing market conditions. Though the geographic focus of the studies ranges from local to regional, each study identifies rising median home prices, affordability gaps and financial barriers to residential development as ongoing challenges in Billings.

ACCELERATING PRODUCTION OF ATTAINABLE HOUSING

NOVEMBER 2024

The Billings Association of REALTORS® estimates an annual deficit of up to 1,300 housing units and a current shortage of almost 10,000 housing units. Additionally, the study reports that four of the five top occupations in Billings do not provide enough income to buy a median-priced home.

The study identifies infill development, expediting review processes, and establishing design-build toolkits as avenues to address the shortage of affordable, workforce and family housing in Billings.

DOWNTOWN BILLINGS HOUSING STUDY UPDATE

SEPTEMBER 2022

Downtown has seen relatively little new residential development, as much of the new residential development has occurred on the edges of Billings. In addition, single-family homes have remained the most common form of new residential development.

The study suggests that the downtown market cannot support rents high enough to offset rising construction costs. The study recommends the use of incentives to make downtown residential development financially feasible and more attractive.

BRCD REGIONAL HOUSING STUDY

MAY 2022

This regional housing study identifies cost burdens, lack of inventory, and displacement as challenges present in the Billings housing market.

The study identifies market-rate rental housing, affordable rental housing, and first-time buyer and missing middle homeownership as priorities for Yellowstone County. The study recommends the use of fee deferrals/waivers, tax increment financing, land banking, Housing Trust Funds, park lands and revisions to land use codes as strategies to address housing priorities.

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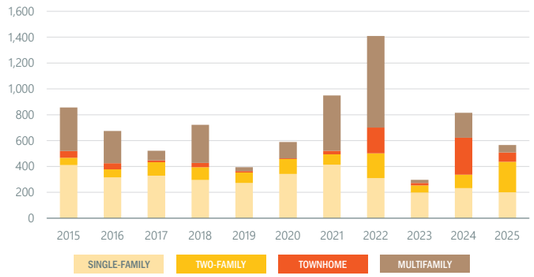
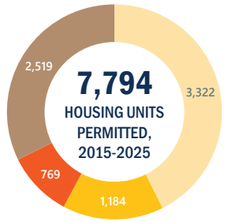
BILLINGS RESIDENTIAL BUILDING PERMITS

Since 2020, new housing production in Billings has shifted towards denser housing typologies

Since 2015, approximately 7,800 residential units have been permitted in Billings. Of the residential housing units permitted, 43% have been single-family homes, 15% have been two-family homes, 10% have been townhomes and 32% have been multifamily homes. The mix of new housing has shifted towards denser options, while total housing production has also grown. From 2015 to 2020, 328 single-family homes and 299 homes in two-family, townhome, and multifamily buildings were permitted annually, on average. Between 2021 and 2025, the average number of single-family homes permitted annually fell to 271, while the average annual number of homes in other typologies increased to 537. Per City data, as of February 2026 subdivision applications have been submitted for over 500 additional residential units.

BILLINGS RESIDENTIAL UNITS PERMITTED, 2015-2025





AVERAGE UNITS PERMITTED ANNUALLY

	2015-2020	2021-2025
SINGLE-FAMILY	328	271
TWO-FAMILY	86	134
TOWNHOME	28	121
MULTIFAMILY	185	282
TOTAL	627	808

Source: Census Building Permits Survey, City of Billings, SB Friedman, U.S. Census Bureau

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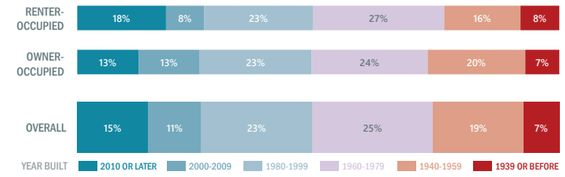
BILLINGS EXISTING HOUSING STOCK

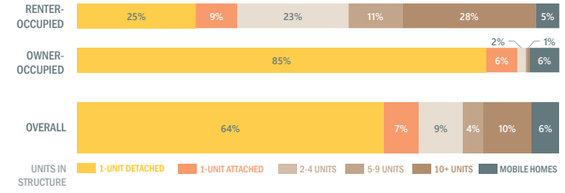
64% of Billings' housing units are single-family detached; 61% of housing units are owner-occupied

- Billings has approximately 53,540 total housing units. Of all housing units in Billings, 61% are owner-occupied (32,600 units) and 33% are renter-occupied (17,700 units). The remaining 3,200 units are vacant. This figure includes 290 units that are sold/rented but not yet occupied, and 310 units occupied seasonally. There are 850 vacant units available for rent and 290 units for sale, per the American Community Survey. The 6% vacancy rate indicates a healthy housing market.
- Over a quarter (26%) of the housing units in Billings were built in or after 2000. While only 13% of owner-occupied units have been built since 2010, 18% of rental units have been built since 2010.
- The majority (71%) of housing units in Billings are single-family homes. Approximately 64% of all housing units are single-family detached units and 7% are single-family attached units. Meanwhile, 23% of all housing units are in multifamily structures (2+ units). An additional 6% of all housing units are mobile homes.
- The housing composition in Billings varies by tenure. Of the owner-occupied units, 85% are single-family detached units, compared to 25% of renter-occupied units. Only 3% of owner-occupied units are in multifamily structures, compared to 62% of renter-occupied. The shares of owner- and renter-occupied single-family attached units and mobile homes are more evenly split.

SHARE OF BILLINGS HOUSING UNITS BY TENURE AND YEAR BUILT, 2023



SHARE OF BILLINGS HOUSING UNITS BY TENURE AND UNITS IN STRUCTURE, 2023



Source: American Community Survey (ACS) 5-Year Estimates (2023), SB Friedman

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MARKET-RATE MULTIFAMILY SUPPLY IN BILLINGS

Almost a third of existing market-rate multifamily units were built since 2015

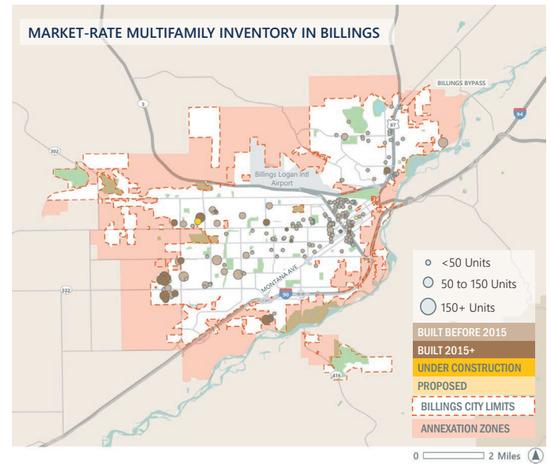
- According to CoStar, Billings has 7,894 market-rate multifamily rental units. An additional 60 units are located in annexation zones. Market-rate multifamily rents average $1.57 per square foot (SF). The overall vacancy rate is 7.7%, which indicates a healthy market; per Cushman & Wakefield, the U.S. average is 9.0%.
- Market-rate units are distributed throughout Billings, with a large concentration of older, smaller developments near the downtown.
- Since 2015, 23 market-rate multifamily developments have been built, adding 2,304 units total, or 29% of Billings' total market-rate multifamily units.
- Newer market-rate developments tend to have more units and are located toward the edges of the city. Market-rate multifamily developments built before 2015 have an average of 29 units compared to those built since 2015, which have an average of 100 units.
- Per CoStar, there are 139 units currently under construction (one project) and 16 additional units proposed (one project) in Billings.

7,894 TOTAL MARKET-RATE UNITS

2,444 MARKET-RATE UNITS BUILT SINCE 2015

7.7% MARKET-RATE VACANCY RATE

MARKET-RATE MULTIFAMILY INVENTORY IN BILLINGS



Source: City of Billings, CoStar (May 2025), Cushman & Wakefield (Q3 2025), SB Friedman

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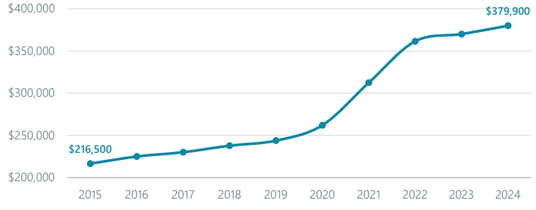
BILLINGS RESIDENTIAL SALE TRENDS

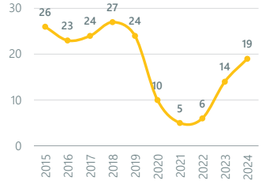
The median home sales price in Billings has increased by over $163,000 since 2015

- In 2015, the median home sales price in Billings was $216,500. The median price increased to $379,900 by 2024 (75% growth since 2015).
- Most of the recent increase in median home sales price occurred between 2020 and 2024. The median home sales price grew at a CAGR of 3.9% from 2015 to 2020. From 2020 to 2024, the median price grew at a higher rate of 9.7%. Over the entire period, the median price increased at a CAGR of 6.4%.
- The median number of days on market for residential property in Billings has varied over the last decade. Between 2015 to 2019, the median number of days on market for residential property ranged from 23 to 27 days. Between 2020 and 2024, the median number of days on the market ranged from 5 to 19 days. The shorter time on market coincided with sharp increases in median sales prices.
- From 2016 to 2020, the number of sales closed increased each year, reaching a high of 2,733 in 2020. From 2020 to 2023, the number of sales closed decreased each year, reaching 1,953 in 2023. In 2024, the number of sales closed increased to 1,979.

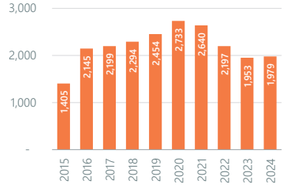
BILLINGS MEDIAN RESIDENTIAL SALES PRICE, 2015-2024



MEDIAN DAYS ON MARKET



RESIDENTIAL SALES CLOSED



Source: Billings Association of Realtors (2025), SB Friedman

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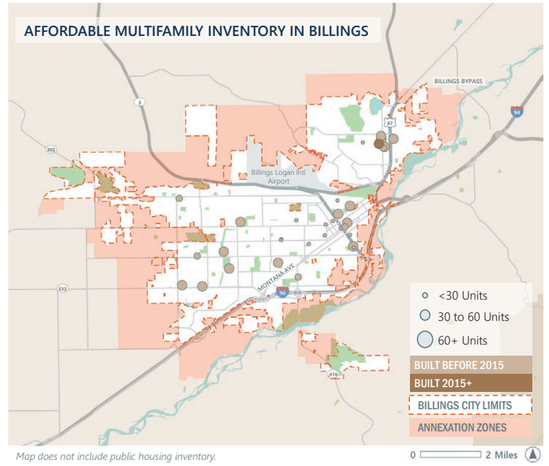
AFFORDABLE MULTIFAMILY SUPPLY IN BILLINGS

Several affordable multifamily developments have been completed in Billings since 2015

- According to Homefront, Billings has 2,013 legally-restricted affordable multifamily rental units (housing with income and rent limits and enforced by legal agreements often tied to funding sources). This figure is inclusive of 216 public housing units operated by Homefront. The overall vacancy rate for affordable multifamily rental units is 5.5%. There are no legally restricted affordable multifamily developments currently located in annexation zones.
- Affordable multifamily rental units are relatively evenly distributed throughout Billings. Clusters of affordable developments are concentrated in the northwest portion of Billings and near the downtown.
- Six affordable multifamily developments (254 units) have been built since 2015, according to Homefront.

AFFORDABLE MULTIFAMILY INVENTORY IN BILLINGS



Map does not include public housing inventory.

2,013 TOTAL AFFORDABLE UNITS

254 AFFORDABLE UNITS BUILT SINCE 2015

5.5% AFFORDABLE VACANCY RATE

Source: City of Billings, CoStar (May 2025), Homefront, SB Friedman

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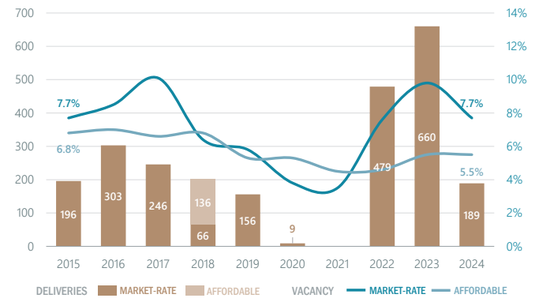
BILLINGS MULTIFAMILY PERFORMANCE TRENDS

Multifamily deliveries increased post-COVID with over 1,300 units delivered between 2022 and 2024

- Approximately 2,440 multifamily rental units have been built in Billings since 2015. Of these units, 2,304 are market-rate and 136 are affordable. All the affordable units were delivered in 2018, whereas the market-rate unit deliveries were distributed throughout the period.
- After the delivery of 549 market-rate units in 2016 and 2017, the market-rate multifamily vacancy rate reached 10.1% in 2017. Once deliveries slowed over the next couple years, this vacancy decreased, eventually reaching a low of 3.5% in 2021. In 2022 and 2023, 1,139 market-rate units were delivered, resulting in vacancy rising to 9.8%. As of 2024, market-rate vacancy decreased to 7.7%.
- The affordable multifamily vacancy rate has remained between 4.5% and 7.0% from 2015 to 2024.

BILLINGS MULTIFAMILY UNITS DELIVERED AND VACANCY RATE



Source: CoStar (May 2025), SB Friedman

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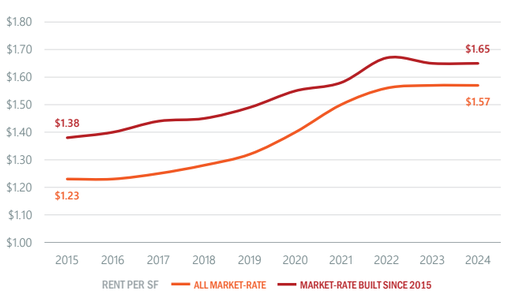
MARKET-RATE MULTIFAMILY RENT TRENDS

Market-rate multifamily rents increase steadily between 2015 and 2022, but have since levelled off

- Since 2015, market-rate rents across all units have increased from $1.23 per SF to $1.57 per SF. Market-rate rents have grown at a CAGR of 2.7%. Market-rate rents for projects built since 2015 have increased from $1.38 per SF in 2015 to $1.65 per SF in 2024.
- Compared to all market-rate projects, rents of projects built since 2015 have grown at a slower CAGR of 2.0%. From 2015 to 2024, projects built since 2015 have had a premium between $0.08 and $0.19 per SF over all market-rate projects.

BILLINGS MARKET-RATE MULTIFAMILY EFFECTIVE RENT PER SF



Source: CoStar (May 2025), SB Friedman

CONCLUSIONS

Home sale prices and rents have increased over the last decade; affordability is a growing concern

- Billings has over 53,500 total housing units, a majority of which (64%) are single-family detached homes. An additional 7% are single-family attached units, 23% are multifamily units, and 6% are mobile homes.
- Since 2000, approximately 15,500 residential units have been permitted in Billings, 77% of which have been single-family homes and the remaining 23% have been multifamily units. Since 2020, multifamily permitting has increased relative to previous years.
- Housing affordability remains a challenge in Billings. From 2015 to 2025, the median home sales price grew at a CAGR of 6.4%, increasing by over $163,000. Multifamily rents have also increased from 2015 to 2024, albeit at a more moderate CAGR of 2.7%.
- Amidst housing affordability concerns, several recent studies identified infill residential development as a potential avenue to increasing the supply of housing attainable to Billings residents. While 2,444 market-rate multifamily units have been built since 2015, most have been built near the edges of city limits. Additionally, only one affordable multifamily development with 136 units has been built since 2015.
- Recent housing studies also identified development incentives, land banking and zoning revisions as strategies, among others, to address housing priorities.

Market-Rate Multifamily Units	7,894
Built Since 2015	*2,444*
Vacancy	7.7%
Average Rent/SF	$1.57
Affordable Multifamily Units	1,748
Built Since 2015	136
Vacancy	5.5%
Average Rent/SF	$1.34
Single-Family Owner-Occupied Units [1]	29,772
Closed Sales 2015-2024	21,999
2024 Median Days on Market	19
2024 Median Sales Price	$379,900

- Planning for a diversity of housing types, including single-family detached homes, townhomes, affordable and market-rate multifamily or condominium homes, would help ensure that there are housing options for people and households at different stages of life and with varying needs.

Source: Billings Association of Realtors (2025), CoStar (May 2025), SB Friedman

ECONOMIC DEVELOPMENT

YELLOWSTONE COUNTY WORKFORCE PROFILE

Wholesale and Retail Trade is the largest employment sector in Yellowstone County

- The 2024 Yellowstone County workforce consists of 88,924 people. This accounts for 15.4% of Montana's total workforce. Yellowstone County and Billings serve as a regional hub and catchment area for people and businesses within approximately 500 miles.
- With 2,493 unemployed people in the Yellowstone County workforce, the overall unemployment rate is 2.8%. The Yellowstone County workforce unemployment rate of 2.8% is slightly lower than the unemployment rate of Montana's overall workforce, which is 3.0%. Both Yellowstone County and Montana have unemployment rates below the national average of 4.0%.
- Wholesale and Retail Trade is the largest employment sector in Yellowstone County, followed by Health Care and Social Assistance, Accommodation and Food Services, and Construction. Together, the four largest employment sectors account for 54% of all jobs in Yellowstone County.
- Yellowstone County's two largest private employers, Billings Clinic and Intermountain Health, are in the Health Care and Social Assistance sector. Each of these private employers provides over 1,000 jobs. The third- and fourth-largest private employers, Walmart and Albertsons, are in the Wholesale and Retail Trade sector and provide over 1,000 and between 500 and 999 jobs, respectively.

LARGEST PRIVATE EMPLOYERS IN YELLOWSTONE COUNTY, 2021

- Billings Clinic (1,000+ jobs)
- Intermountain Health (1,000+ jobs)
- Walmart (1,000+ jobs)
- Albertsons (500-999 jobs)

LARGEST PUBLIC EMPLOYERS IN YELLOWSTONE COUNTY, 2024

- City of Billings (1,000+ jobs)
- Billings Public Schools (1,000+ jobs)

LARGEST EMPLOYMENT SECTORS IN YELLOWSTONE COUNTY, 2024

- Wholesale and Retail Trade
- Health Care and Social Assistance
- Accommodation and Food Services
- Construction

88,924
YELLOWSTONE COUNTY WORKFORCE

15.4%
SHARE OF MONTANA WORKFORCE IN YELLOWSTONE COUNTY

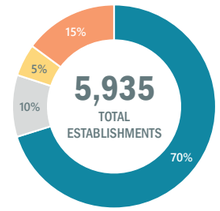
Source: City of Billings, Montana Department of Labor & Industry (2024), SB Friedman, U.S. Bureau of Labor Statistics (2024)

YELLOWSTONE COUNTY SMALL BUSINESS PROFILE

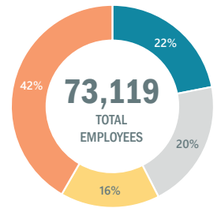
Approximately 70% of establishments in Yellowstone County have less than 20 employees

- In 2022, Yellowstone County had approximately 5,935 business establishments. Of the 5,935 establishments, 70% had fewer than 20 employees, while another 10% of establishments had between 20 and 99 employees. Only 5% of establishments had between 100 and 499 employees and the remaining 15% had at least 500 employees.
- Of the 73,100 employees in Yellowstone County, approximately 22% worked at establishments with fewer than 20 employees. Meanwhile, approximately 42% of total employees worked at establishments with over 500 employees. While most establishments are small businesses with fewer than 20 employees, the majority (58%) of employees in Yellowstone County work at establishments with 100 or more employees.
- Average employee pay in Yellowstone County increases with establishment size. Establishments with over 500 employees had an average annual pay of $66,030, whereas those with fewer than 20 employees had an average pay of $44,573.
- During interviews, multiple business and economic development stakeholder identified Billings as a "business-friendly" city.

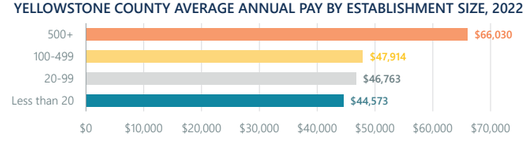
YELLOWSTONE COUNTY ESTABLISHMENTS BY SIZE, 2022



YELLOWSTONE COUNTY EMPLOYEES BY ESTABLISHMENT SIZE, 2022



YELLOWSTONE COUNTY AVERAGE ANNUAL PAY BY ESTABLISHMENT SIZE, 2022



Source: SB Friedman, U.S. Census Statistics of U.S. Businesses (SUBS) (2022)

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ECONOMIC CLUSTERS

Regional economies consist of traded (primary) and local (secondary) clusters

Regional economies can be categorized into economic clusters or industry groups. A cluster is a regional concentration of related industries. Regional economies are made up of two types of clusters, each with different patterns of geographic presence and different competitive dynamics.

- Traded clusters, also known as primary job clusters, are groups of related industries that export products/serve markets beyond the region in which they are located. Since primary clusters compete in cross-regional markets, they are exposed to competition from other regions. Typically, approximately 30% of jobs in a geography are within primary clusters.
  - Examples: Business Services, Financial Services, Hospitality & Tourism, Manufacturing, Transportation & Warehousing
- Local clusters, also known as secondary job clusters, consist of industries that serve the local market. They are found in every region of the country, regardless of the competitive position of a particular location. A region's employment in secondary clusters is usually proportional to the population of that region.
  - Examples: Local Government, Real Estate, Schools & Hospitals

Location quotients (LQ) quantify the specialization of a region's industry compared to national employment averages. High location quotients are typically indicative of high-export businesses. Of the largest industry clusters, Yellowstone County has the highest employment concentrations and specializations within the following sectors:

- Oil and Gas Production and Transportation (LQ=4.78)
- Engineering Services (LQ=1.88)
- Health Care (LQ=1.71)

Source: Lightcast (2025), SB Friedman

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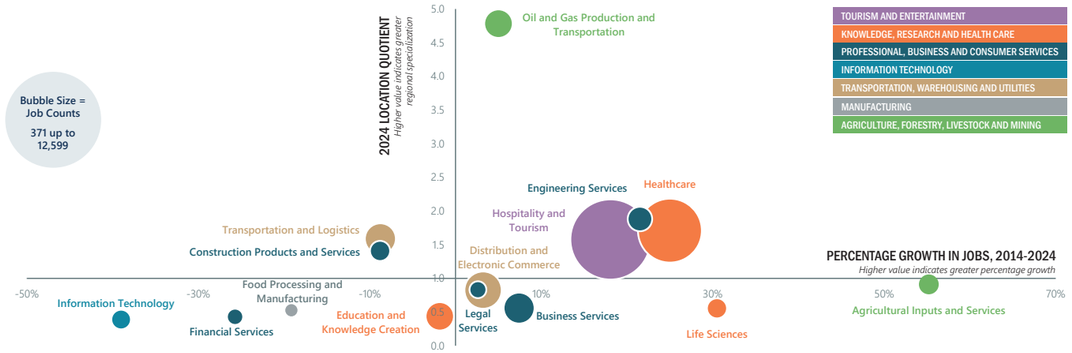
YELLOWSTONE COUNTY PREDOMINANT ECONOMIC CLUSTERS

Agricultural Inputs and Services was the fastest-growing sector in the last decade

Yellowstone County has experienced growth across many economic clusters since 2014. The Agricultural Inputs and Services cluster grew by over 55% from 2014 to 2024, making it the fastest growing top-ten traded cluster in the county. Despite its significant growth, it only provides 775 jobs, making it the tenth-largest traded cluster in the county. The two largest traded clusters, Hospitality and Tourism and Health Care, which provide 12,599 and 7,985 jobs, respectively, had more moderate growth rates of 18% and 25%.



[1] Lightcast projected employment only extends to 2034. Therefore, the analyses are through 2034, rather than 2045 like the growth projections.
Source: Lightcast, SB Friedman

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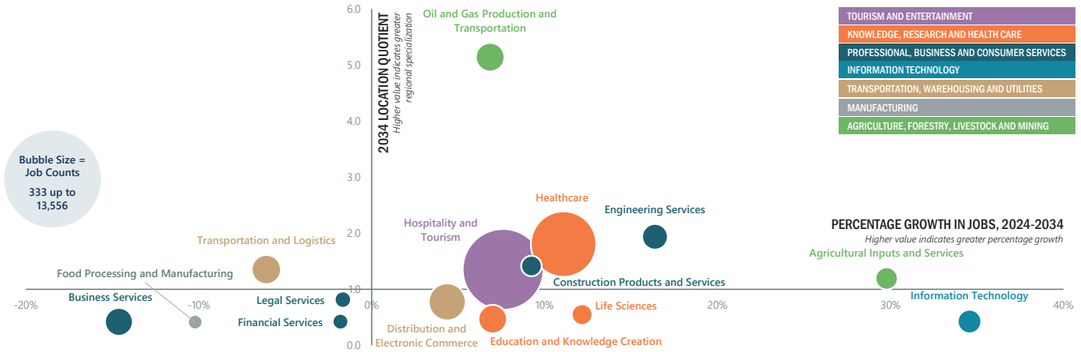
YELLOWSTONE COUNTY PROJECTED CLUSTER GROWTH

Job growth is projected to be driven largely by the Health Care and Hospitality and Tourism sectors

Hospitality and Tourism is projected to remain Yellowstone County's largest employment cluster and add 960 jobs from 2024 to 2034. Hospitality and Tourism's growth will account for 16% of projected job growth during the period. Health Care is projected to remain the second-largest traded cluster and add 890 jobs, or 15% of projected job growth, over the same the period. While Information Technology and Agricultural Inputs and Services are projected to be the fastest-growing top-ten traded clusters due to their smaller size, their growth will only account for a combined 8% of net job growth.



[1] Lightcast projected employment only extends to 2034. Therefore, the analyses are through 2034, rather than 2045 like the growth projections.
Source: Lightcast, SB Friedman

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HISTORIC & PROJECTED MAJOR ECONOMIC CLUSTER GROWTH

Eight of ten largest traded clusters in the county are projected to grow between 2024 and 2034

Eight of the ten largest traded employment clusters in Yellowstone County are projected to grow from 2024 to 2034. The two major employment clusters that are projected to lose jobs from 2024 to 2034 are Transportation and Logistics and Business Services.

Hospitality and Tourism has remained the largest employment cluster in Yellowstone County since 2014. Hospitality and Tourism provided 12,600 jobs in 2024 and is projected to provide 13,560 jobs in 2034. As a result, there is likely to be greater demand for hotels, event spaces and tourist activities going forward. Although Hospitality and Tourism is the largest sector, it has the lowest average wage of the ten largest employment sectors. Health Care has remained the second-largest cluster in the county since 2014, and Distribution and Electronic Commerce has remained the third-largest cluster.

TOP TEN TRADED EMPLOYMENT CLUSTERS IN YELLOWSTONE COUNTY, 2014-2034

	Employment, 2014	Employment, 2024	Projected Employment, 2034	Employment CAGR, 2014-2024	Employment CAGR, 2024-2034	Average Wage, 2024
Hospitality and Tourism	10,671	12,599	13,556	1.7%	0.7%	$30,000
Health Care	6,388	7,985	8,871	2.3%	1.1%	$110,800
Distribution and Electronic Commerce	2,612	2,696	2,814	0.3%	0.4%	$97,700
Transportation and Logistics [1]	2,041	1,862	1,749	-0.9%	-0.6%	$84,800
Business Services	1,725	1,853	1,582	0.7%	-1.6%	$95,700
Oil and Gas Production & Transportation	1,495	1,569	1,677	0.5%	0.7%	$212,500
Education and Knowledge Production	1,581	1,552	1,661	-0.2%	0.7%	$41,400
Engineering Services	952	1,157	1,346	2.0%	1.5%	$139,800
Construction Products and Services	855	780	852	-0.9%	0.9%	$108,100
Agricultural Inputs and Services	499	775	1,006	4.5%	2.6%	$43,900

[1] The decrease in Transportation and Logistics employment appears to be a product of how "traded" and "local" clusters are defined and organized. The traded "Transportation and Logistics" sector lost approximately 180 jobs, largely due to decreases in long distance freight trucking and freight transportation arrangement. However, jobs in local logistical services grew by ~800, driven largely by increases in express delivery services. Local cluster employment is shown on page 26.
Source: Lightcast (2025), SB Friedman

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HISTORIC & PROJECTED ECONOMIC CLUSTER GROWTH

Yellowstone County is projected to gain over 5,800 jobs from 2024 to 2034

In 2024, Yellowstone County had approximately 89,298 jobs. Local cluster jobs accounted for 58% of total employment in Yellowstone County in 2024. Jobs in the ten largest traded clusters accounted for 37% of Yellowstone County's total employment. Jobs in other traded clusters accounted for an additional 5% of total employment. From 2014 to 2024, Yellowstone County employment increased by approximately 8,450 jobs. During this period, total employment grew at a CAGR of 1.0%, driven by growth in local clusters and the ten largest traded clusters. Yellowstone County is projected to gain 5,861 jobs from 2024 to 2034, bringing total employment to 95,159. During this period, total employment is projected to grow at a CAGR of 0.6%, which is slightly slower than the prior ten-year period.

EMPLOYMENT IN YELLOWSTONE COUNTY, 2014-2034

	Employment, 2014	Employment, 2024	Projected Employment, 2034	Employment CAGR, 2014-2024	Employment CAGR, 2024-2034	Weighted Average Wage, 2024
Ten Largest Traded Clusters	28,820	32,830	35,114	1.3%	0.7%	$77,327
All Other Traded Clusters	5,061	4,781	5,289	-0.6%	1.0%	$93,950
Real Estate, Construction & Development	6,583	8,055	8,698	2.0%	0.8%	$80,435
Local Health Services	4,757	5,241	5,924	1.0%	1.2%	$73,519
Local Motor Vehicle Products & Services	4,145	4,426	4,526	0.7%	0.2%	$71,793
Local Education and Training	3,593	3,913	3,994	0.9%	0.2%	$65,455
Local Commercial Services	3,466	3,561	3,601	0.3%	0.1%	$57,468
All Other Local Clusters	24,423	26,491	28,012	0.8%	0.6%	$67,613
YELLOWSTONE COUNTY TOTAL	**80,848**	**89,298**	**95,159**	**1.0%**	**0.6%**	

Source: Lightcast (2025), SB Friedman

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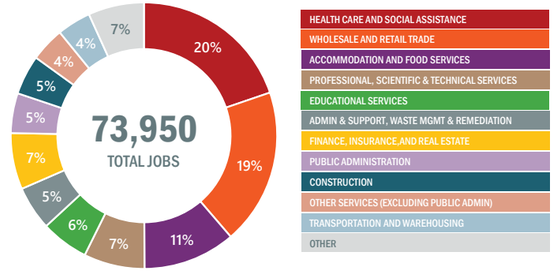
BILLINGS EMPLOYMENT BASE

Health Care and Social Assistance is the largest employment sector in Billings

- Billings has a total of 73,950 jobs. The three largest sectors in Billings, Health Care and Social Assistance, Wholesale and Retail Trade, and Accommodation and Food Services account for half of all jobs in Billings.
- Health Care and Social Assistance is the largest employment sector in Billings and provides 14,600 jobs. Wholesale and Retail Trade, the second-largest employment sector, provides another 14,000 jobs. The next largest sectors are Accommodation and Food Services and Professional, Scientific & Technical Services, which provide 8,300 and 5,500 jobs, respectively.

BILLINGS JOBS BY SECTOR, 2022



Source: US Census Longitudinal Employment Household Dynamics (LEHD) (2022), SB Friedman

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INDUSTRIAL SUPPLY IN BILLINGS

Industrial developments are densely concentrated along Montana Ave and I-90

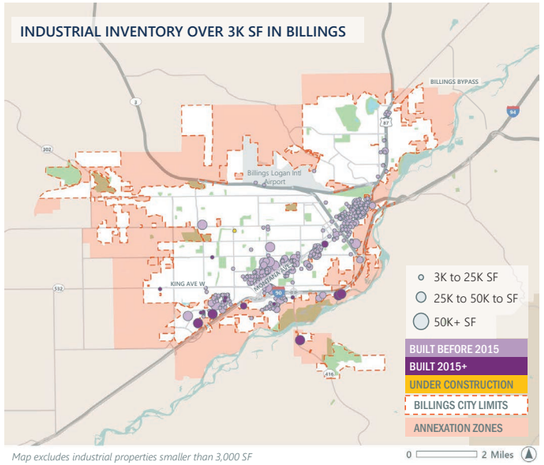
- Billings has approximately 7,912,000 SF of existing industrial space. The industrial building supply in Billings is largely concentrated along Montana Avenue or near I-90. The overall vacancy rate is 4.6% and the average triple-net rent is $8.79 per SF, according to CoStar. The vacancy rate indicates a healthy market; the U.S. average is 6.2%, per Cushman & Wakefield.
- Approximately 719,000 SF of industrial space has been built since 2015, which accounts for 9.4% of Billings' existing inventory. There is one 3,100-SF industrial development currently under construction in Billings.
- In addition, there is approximately 1,710,800 SF of existing industrial space in annexation zones, 648,200 SF of which have been built since 2015. While the city has more than four times as much industrial supply as the annexation zones, development since 2015 in the two geographies has been comparable.
- Per the City, as of February 2026 subdivision applications encompassing nearly 450 acres of land for proposed commercial uses have been submitted.

7.9M TOTAL INDUSTRIAL SF

0.7M INDUSTRIAL SF BUILT SINCE 2015

4.6% INDUSTRIAL VACANCY RATE

INDUSTRIAL INVENTORY OVER 3K SF IN BILLINGS



Map excludes industrial properties smaller than 3,000 SF

Source: City of Billings, CoStar (May 2025), Cushman & Wakefield (Q3 2025), SB Friedman

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OFFICE SUPPLY IN BILLINGS

Less than 2% of the 6.3 million SF of office space in Billings was built since 2015

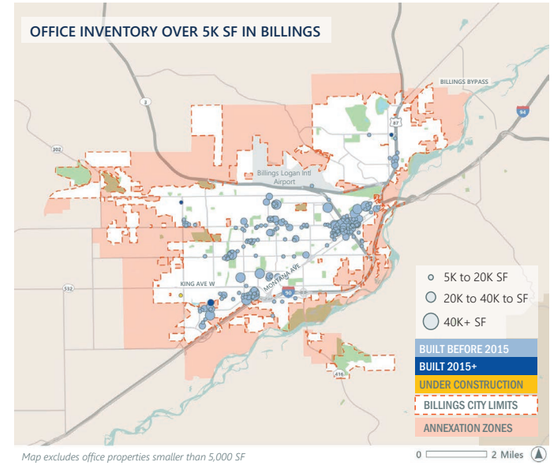
- Billings has approximately 6,273,000 SF of existing office space. The overall vacancy rate is 3.5% and the average triple-net rent is $20.40 per SF, according to CoStar. The vacancy rate indicates a constrained market, as the U.S. average is 19.9%, per Cushman & Wakefield. However, some of the office properties may be leased, but not fully occupied due to remote or hybrid work policies.
- Approximately 66,100 SF of additional office space is located in annexation zones.
- Much of the existing office inventory is concentrated in and around the downtown. There are additional office clusters in the western half of the city.
- Approximately 101,000 SF of office space has been built since 2015; therefore, 98.4% of the city's existing office inventory was built before 2015. There is one 5,000-SF office development currently under construction in Billings.

6.3M TOTAL OFFICE SF

0.1M OFFICE SF BUILT SINCE 2015

3.5% OFFICE VACANCY RATE

OFFICE INVENTORY OVER 5K SF IN BILLINGS



Map excludes office properties smaller than 5,000 SF

Source: City of Billings, CoStar (May 2025), Cushman & Wakefield (Q3 2025), SB Friedman

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RETAIL SUPPLY IN BILLINGS

Less than 5% of the 10.6 million SF of retail space in Billings was built since 2015

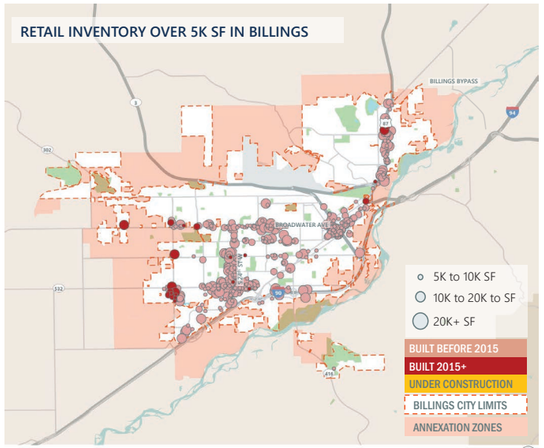
- Billings has approximately 10,608,000 SF of existing retail space. According to CoStar, the average triple-net rent is $10.95 per SF, while the overall vacancy rate is 2.1%, which indicates a constrained market (U.S. average is 5.3%). Approximately 435,500 SF of additional retail space is in annexation zones.
- Much of the retail supply is concentrated in the downtown, along major commercial corridors, including Broadwater Avenue, King Avenue W, 24th Street, or in the northwest portion of the city along US Highway 87.
- Approximately 447,000 SF of retail space has been built since 2015; therefore, 95.8% of Billings' existing retail inventory was built before 2015. There are no retail developments proposed or currently under construction in Billings.
- Although there has been limited new retail space built in Billings since 2015, the city remains an important retail hub for the county, region and state. In 2025, Billings had a $1.5 billion surplus of retail sales, indicating that the city's retail market captures significant spending from people living outside the city.

10.6M TOTAL RETAIL SF

0.4M RETAIL SF BUILT SINCE 2015

2.1% RETAIL VACANCY RATE

RETAIL INVENTORY OVER 5K SF IN BILLINGS



Map excludes retail properties smaller than 5,000 SF

[1] Retail properties and square footage estimates account for ground-floor retail space in mixed-use buildings.
Source: City of Billings, CoStar (May 2025), Cushman & Wakefield (Q3 2025), SB Friedman

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CONCLUSIONS

Billings has experienced limited office and retail development; industrial is the strongest product type

- The 2024 Yellowstone County workforce consists of 88,924 people, or approximately 15.4% of Montana's total workforce. The overall county unemployment rate is 2.8%. Eight of the ten largest traded employment clusters in Yellowstone County are projected to grow from 2024 to 2034.
- Billings has a total of 73,950 jobs. The three largest sectors in Billings, Health Care and Social Assistance, Wholesale and Retail Trade, and Accommodation and Food Services account for half of all jobs in Billings.
- Industrial is the strongest commercial product type in Billings. Billings has approximately 7,912,300 SF of existing industrial space within its city limits and an additional 1,710,800 SF in its annexation zones. Approximately 9.4% of the city's industrial inventory has been built since 2015.
- Aligned with national post-COVID trends, Billings' office market has experienced limited growth recently. Billings has approximately 6,273,000 SF of office space. Less than 2% of existing office space has been built since 2015.
- Billings has approximately 10,608,000 SF of existing retail space. Only 447,000 SF of retail space has been built since 2015, which accounts for only 4.2% of the overall inventory. Despite limited recent retail development, Billings remains an important retail hub for the county, region and state.

	Billings	Annexation Zones
Total Industrial SF	7,912,300	1,710,800
Built Since 2015	*730,000*	*648,200*
Vacancy	4.6%	
Average Rent/SF	$8.79	
Total Office SF	6,273,100	66,100
Built Since 2015	*100,800*	--
Vacancy	3.5%	
Average Rent/SF	$20.40	
Total Retail SF	10,608,100	435,500
Built Since 2015	*447,200*	*27,100*
Vacancy	2.1%	
Average Rent/SF	$10.95	

Source: CoStar (May 2025), SB Friedman

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GROWTH PROJECTIONS

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BILLINGS GROWTH PROJECTIONS

The population of Billings is projected to grow to 153,800 by 2045

SB Friedman developed population and growth projections based on historic trends and anticipated future needs, which will inform future planning efforts and land use policy. The following assumptions inform the growth projection:

- **Population:** Between 2010 and 2023, the population of Billings grew at a 1.11% CAGR. The population projections assume that this historic population growth rate will continue. Population growth projections account for both natural growth (births minus deaths) and net in-migration (including annexation).
- **Housing Units:** Housing needs depend in large part on the population. The housing unit projections assume that Billings' current average household size (2.29) and ratio of households to housing units (0.94) will remain constant through 2045.
- **Jobs:** Job projections are based on projected population growth and the historic ratio of jobs to population in the labor force. Due to data limitations, job counts are estimated and projected for the four primary ZIP codes overlapping Billings: 59101, 59102, 59105 and 59106.
- **Commercial Space:** The projections for industrial, office and retail inventory are informed by existing inventory, recent development trends, historic SF per capita ratios and regional trends specific to each property type. Since 2010, office and retail space per capita has decreased in Billings; the commercial inventory projections assume that these trends continue.

BILLINGS GROWTH PROJECTIONS, 2025-2045

	2025 (Estimated)	2045 (Projected)	2025-2045 Proj. Change	2025-2045 CAGR
Population	123,500	153,800	+30,300	1.11%
Housing Units	55,300	71,500	+16,200	1.29%
Jobs	84,900	106,600	+22,700	1.21%
Industrial SF	7,912,300	10,169,000	+2,256,700	1.26%
Office SF	6,273,100	7,357,000	+1,083,900	0.80%
Retail SF	10,608,100	12,397,500	+1,789,400	0.78%

Source: CoStar (May 2025), Lightcast (2025), Montana Department of Commerce, SB Friedman

CONCLUSIONS

Projected population growth drives demand for additional residential and commercial development

- SB Friedman analyzed the city's existing and projected housing needs given anticipated population growth; assessed current and future economic development conditions and opportunities; and evaluated potential market constraints to future development.
- Billings is projected to continue growing through 2045. To accommodate that growth, the city will need to plan for new housing. Stakeholder interviews identified utilities as one of the biggest constraints to housing development and affordability. As a result, the city will likely need to plan for both infill housing development — which can rely on existing municipal infrastructure — as well as strategic extensions to accommodate residential development outside the existing municipal limits. Planning for a diversity of housing types, including single-family detached homes, townhomes, affordable and market-rate multifamily or condominium homes, would help ensure that there are housing options for people and households at different stages of life and with varying needs.
- Billings is a commercial and employment hub, drawing both consumers and workers from a broader region. As population is projected to grow over the next 20 years so too is employment, as well as the commercial space needed to accommodate the additional demand.
- Industrial is the strongest product type currently. Most recent industrial development has been located on the edges of Billings, or within annexation zones. Given land constraints in the city, we project that these locations will accommodate most of the future industrial development. Like with housing, strategic infrastructure planning will be key to accommodating demand.
- The office market is relatively weak, particularly as work-from-home and hybrid working arrangements become more commonplace, though lease vacancy remains relatively low. Most future office development is likely to be smaller-scale space for professional users like dentists, lawyers or accountants. Conversely, there will likely be less demand for corporate office space. Any near-term corporate office development is likely to be built-to-suit space led by specific companies, rather than speculative development.
- As the population and employment in Billings grows, demand for additional retail space will also increase, albeit at a slower rate given ongoing market trends. Most future retail development will likely be needed to meet the daily needs of new residents and workers, particularly in areas where population grows the most. Over the last decade the Heights and West Billings have grown the most. Given greater land constraints in the core of Billings, it is likely that these areas will accommodate much of the future growth in retail demand.

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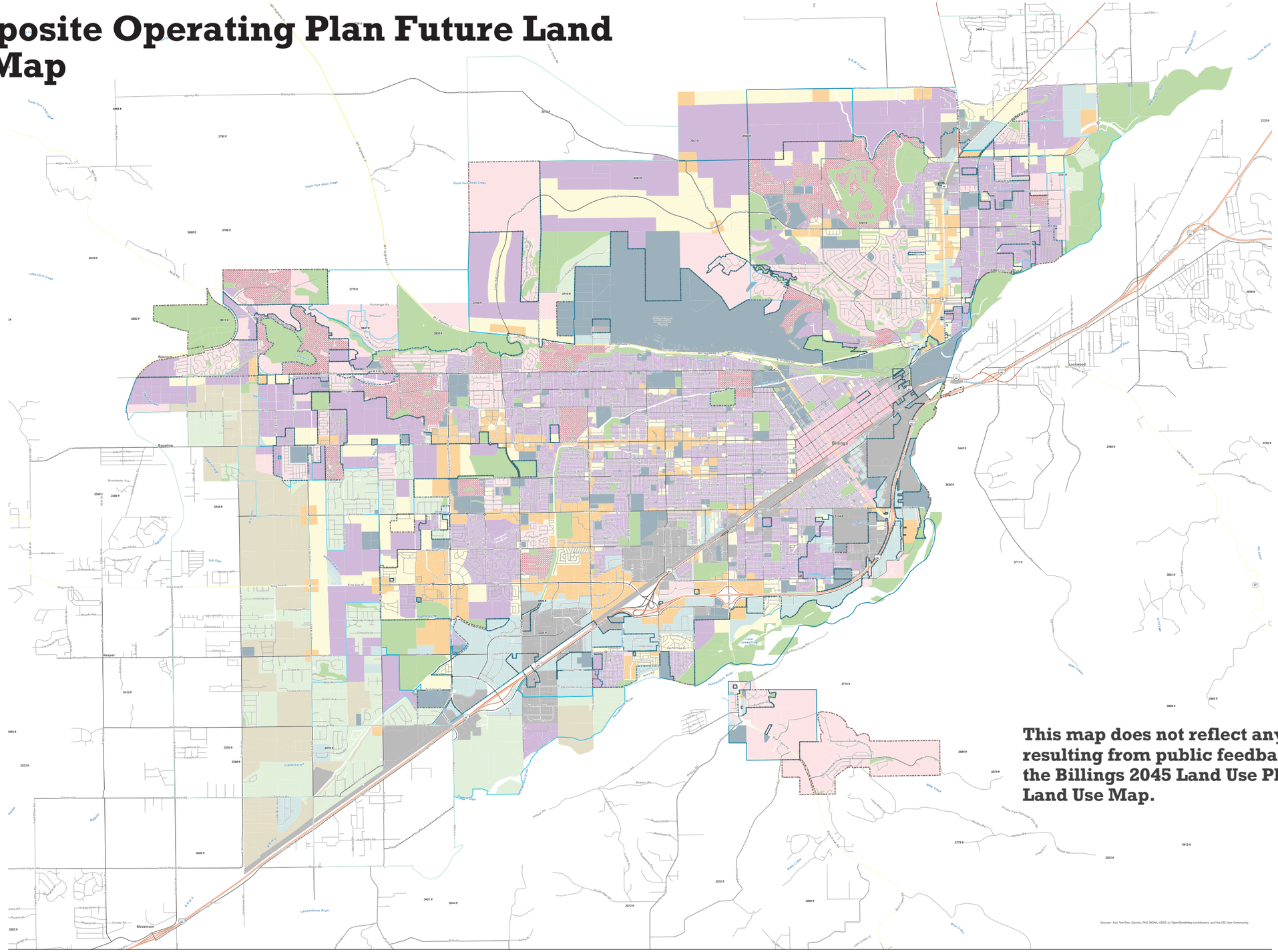
STRATEGY
DEVELOPMENT STRATEGY AND PLANNING

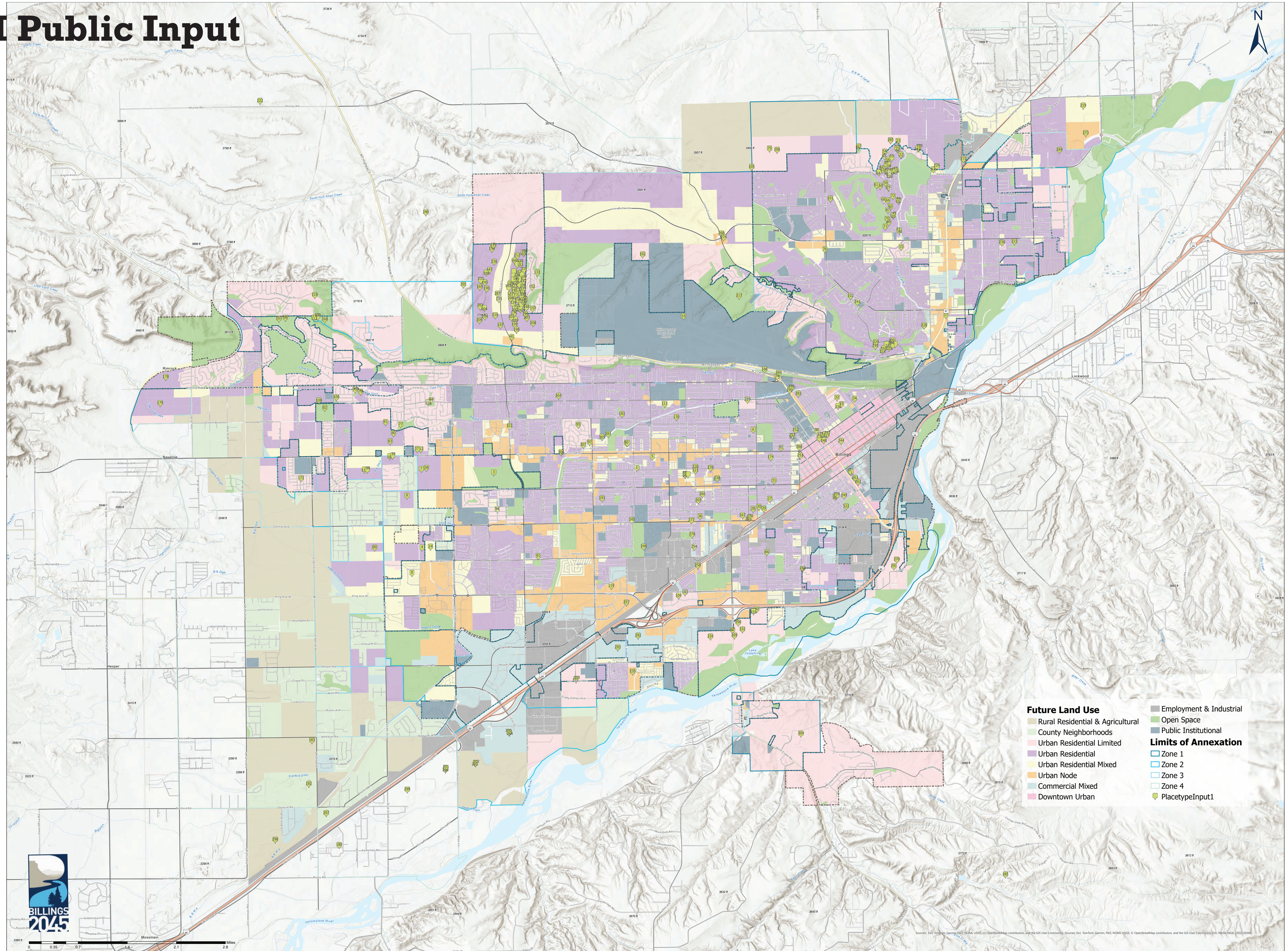
FINANCE | IMPLEMENTATION
PUBLIC-PRIVATE PARTNERSHIPS AND IMPLEMENTATION

B. Composite Operating Plan Future Land Use Map



This map does not reflect any changes resulting from public feedback collected on the Billings 2045 Land Use Plan and Future Land Use Map.

C. FLUM Public Input



OBJECTID	Comment	x	y
1	PI	-108.5	45.77889
2	PI	-108.5	45.77881
5	Urban Residential Mixed would fit this parcel better in my opinion due to zoning to the East, South, and Southwest.	-108.627	45.76424
6	Originally a Community Commercial parcel up until Project Recode, which would match Alpine Village zoning.	-108.559	45.78246
7	Does this proposed zoning allow for the reconstruction of it's original and current use? (4) 4plex buildings along Avenue E.	-108.529	45.7878
8	Urban Residential Limited seems like a better fit.	-108.627	45.7805
9	Urban Residential Limited seems like a better fit.	-108.631	45.775
10	Shouldn't this be Urban Node based on the current use?	-108.63	45.75902
11	Urban Residential Limited seems like a better fit.	-108.636	45.78319
12	Urban Residential Limited seems like a better fit.	-108.644	45.78049
13	Urban Residential Limited seems like a better fit.	-108.627	45.78457
14	Does Urban Node make more sense here as there is already an approved commercial use? Future development may include self storage or multifamily.	-108.475	45.84111
15	How is traffic flow going to be accessed to Monad as Bell is not a street capable of handling traffic it doesn't even have a line?	-108.624	45.76441
16	This area should be UR	-108.484	45.82517
17	I think this is great!	-108.549	45.81143
18	Should this be Urban Node and Commercial Mixes	-108.471	45.81092
19	This area from here west should be Urban Residential Limited	-108.486	45.84098
20	This area from here west should be Urban Residential Limited	-108.485	45.83476
21	This area from here west should be Urban Residential Limited	-108.487	45.83171
22	Almadin Ln should be Urban Residential Limited	-108.485	45.82854
23	This area from here west should be Urban Residential Limited	-108.484	45.84416
24	This area from here west should be Urban Residential Limited	-108.485	45.84709
25	This area should be Urban Residential Limited	-108.487	45.84069
26	This area should be Urban Residential Limited	-108.488	45.83749
27	This area should be Urban Residential Limited	-108.488	45.84069
28	This whole half-block could be urban residential mixed.	-108.524	45.77347
29	This is across from a grocery store and adjacent to bus stops. Urban Residential Mixed would make more sense.	-108.529	45.77142
30	Commercial mixed, to match the rest of this half-block. There's no residential here; it's a coffee kiosk currently.	-108.526	45.77143
31	Urban residential mixed, to match the rest of the half-block. This parcel has multiple businesses currently, so I think it wouldn't be an issue.	-108.527	45.77185
32	The lots facing Broadwater from 1st to 9th Sts could be Urban Residential Mixed. There are some apartments and small businesses on this stretch, plus bus stops + multiple adjacent schools. Would buffer the interior neighborhoods from Broadwater's traffic.	-108.523	45.77721
33	Urban Residential seems like a better fit for this whole area than Urban Residential Mixed. There's nothing particularly suburban about it!	-108.504	45.79423
34	The lots on the south side of this block, facing North Park, could all be Urban Residential Mixed. There are already some multi-unit buildings here, and an small older commercial building at the west end of the block.	-108.503	45.79283
35	Urban Residential seems like a better fit. It's currently a residence. No reason to encourage Urban Node development on a single parcel.	-108.499	45.79395
36	The South Side Triangle area feels very "patchwork" on this draft map. Is there a way to do this so the placetypes feel more intentional? At the very least, I would suggest switching the few Commercial Mixed parcels west of S. 27th to something else.	-108.505	45.77373
37	This whole half-block is primarily businesses currently, and faces a major road. Urban Road or Commercial Mixed seem more appropriate.	-108.545	45.77004
38	I disagree with the other comment on this parcel. This should be Residential or Urban Residential Mixed.	-108.628	45.78461
39	I disagree with the other comment on this parcel. This should be Residential or Urban Residential Mixed.	-108.625	45.78071
40	I disagree with the other comment on this parcel. This should be Residential or Urban Residential Mixed.	-108.635	45.7833
41	Urban Residential Limited next to the interstate doesn't seem practical.	-108.528	45.75073
42	I like the Urban Node proposed here!	-108.6	45.80752
43	This area should be Urban Residential Limited	-108.485	45.84535
44	This area should be Urban Residential Limited as SF only	-108.486	45.84108
45	This area should be Urban Residential Limited as SF only	-108.485	45.8348
46	This area should be Urban Residential Limited as SF only	-108.487	45.83177
47	This area should be Urban Residential Limited as SF only	-108.485	45.82851
48	This area should be Urban Residential Limited as SF only	-108.488	45.83749
49	This area should be Urban Residential Limited as SF only	-108.487	45.8408
50	This area should be Urban Residential Limited as SF only	-108.488	45.8408
51		-108.484	45.84424
52		-108.485	45.84557
53	This area should be Urban Residential Limited as SF only	-108.485	45.8456
54	This area should be Urban Residential Limited as SF only	-108.487	45.84362
55	This area should be Urban Residential Limited as SF only	-108.489	45.84489
56	This area should be Urban Residential Limited as SF only	-108.489	45.84395
57	This area should be Urban Residential Limited as SF only	-108.488	45.84321
58		-108.488	45.84225
59	This area should be Urban Residential Limited as SF only	-108.488	45.84218
60	This area should be Urban Residential Limited as SF only	-108.489	45.83839
61	This area should be Urban Residential Limited as SF only	-108.49	45.83782
62	This area should be Urban Residential Limited as SF only	-108.491	45.83799
63		-108.49	45.84146
64	This area should be Urban Residential Limited as SF only	-108.49	45.84119
65	This area should be Urban Residential Limited as SF only	-108.491	45.84066
66	This area should be Urban Residential Limited as SF only	-108.487	45.83353
67	This area should be Urban Residential Limited as SF only	-108.488	45.8348
68	This area should be Urban Residential Limited as SF only	-108.488	45.83287
69	This area should be Urban Residential Limited as SF only	-108.49	45.83494
70	This area should be Urban Residential Limited as SF only	-108.488	45.8303
71	This area should be Urban Residential Limited as SF only	-108.488	45.83099
72	This area should be Urban Residential Limited as SF only	-108.489	45.82941
73	This area should be Urban Residential Limited as SF only	-108.487	45.83569
74	Several families enjoy hiking and snowshoeing in this area. It is also home to wildlife.	-108.599	45.81627

75	These road islands ("Gateway Park") should be Open Space.	-108.522	45.79873
76	The master plan for High Sierra shows this area at the same planned density as the rest of the subdivision. Could it be Urban Residential like the rest?	-108.523	45.84585
77	Should be Urban Residential Mixed. SD2 sold this parcel to HomeFront.	-108.507	45.82488
78	keep as river rock park and develop park per master plan from 2011	-108.633	45.78974
79	urban residential limited	-108.645	45.79658
80	keep park and develop park	-108.646	45.79701
81	urban residential limited surrounding park on south side and up to rangeview	-108.635	45.78794
82	urban residential limited	-108.637	45.79024
83	develop park	-108.655	45.79334
84	extend the big ditch trail down to grand	-108.636	45.78625
85	dont sell our park	-108.624	45.79465
86	Urban Residential Mixed to match surrounding properties.	-108.549	45.77877
87	Odd that this one sliver is Urban Residential Limited. Should it just be Urban Residential?	-108.525	45.76242
88	Maybe encourage denser development along S. Billings Boulevard?	-108.536	45.74646
89	I disagree with the other comment on this parcel. This should be Urban Residential to help transition between denser development on Grand and the existing county neighborhood to the south.	-108.643	45.78047
90	Would these be Public Institutional, since SD2 owns them and has them earmarked for a future high school?	-108.641	45.76434
91	Update to PI - this is a church	-108.566	45.78538
94	Consider RMU instead of single family if selling land. Create a town square: public meeting space, community center & condos.	-108.593	45.76219
95	The lots facing Grand from 1st to 4th Sts could be Urban Residential Mixed. There are some apartments and small businesses on this stretch, plus bus stops + multiple adjacent schools. Would buffer the interior neighborhoods from Grand's traffic.	-108.521	45.784
96	It would be nice to remove the ‘double’ dog leg Avenue C and give the children a safer crossing here (and on all the alphabet parks).	-108.517	45.78631
97	Urban Residential feels more appropriate for this area (between 32nd and 36th) than Urban Residential Limited. It's next to parks/trails/churches, sidewalks are gradually getting built out, and it's adjacent to an Urban Node area.	-108.605	45.77198
98	It seems stifling not to let this area be UR or even ditch facing URM to allow incremental density here. It is surrounded by UR - why keep it trapped and low value when the city budget could be net from a bit more granularity?	-108.58	45.78925
99	P2 missing for library, Lincoln, SD2 buildings, St John’s	-108.51	45.78734
100	This could be bumped up to node to allow for a live-work active transport ‘canal district’, building on existing businesses. Perhaps the city could support by purchasing a small P1 mixed use canal trail strip, paving the way (as it were)for a 24th	-108.577	45.7856
101	Should the undeveloped land owned by the Country Club be switched to Urban Residential Limited, given that it was zoned as residential prior to Project Recode and the country club has not committed to maintaining it as open space?	-108.667	45.81203
102	This wet, tree- filled, unbuilt extension of Spring creek would be better suited to public space than building. Land for sale, I believe.	-108.549	45.77864
103	This should be changed to Residential Limited provided it was previously R9600 prior to ReCode and can be changed from the existing P1 in the future.	-108.657	45.8122
104	Established suburban neighborhood should remain as single family. Please change all this area that is N3 to Urban Residential Limited and limit the housing to single family homes. Thank you.	-108.505	45.83536
105	What a great linear park and carless connection!	-108.5	45.81519
106	Please make this a node area like its bookends. The point of investing in public infrastructure like an ice rink is to realize value gains from the surrounding property to pay for maintenance, upkeep and Zambonis. Single-family freeway hoods won’t cut it.	-108.55	45.75438
107	Shouldn't this area be Commercial Mixed or Urban Node?	-108.551	45.75372
108	URM	-108.528	45.8421
109	UR	-108.521	45.84558
110	This should be Urban Residential Limited similar to what is was before Project Re:Cod changed it. This will allow YCC to develop the land as another nine holes for golf, new residential homes consistent to the neighborhood, or a combination of both.	-108.668	45.81187
111	Problem: single family tax/acre. Develop this space with fiscally responsible street side mixed use for a few apartments and neighborhood gathering hub. Arrange value trade with ditch assn to extend linear hi-line ditch trail west-east for connectivity.	-108.657	45.79485
112	Plan for connectivity working with the hi- line ditch association to create a linear park leading through to Rimrock West Park. Consider a land value exchange if necessary. Plan ahead to create this space for kids, dogs, wildlife and the whole community.	-108.652	45.79548
113	You may want to trade a corner lot to Hi line ditch assn for Hi Line ditch trail access connecting through to Poly Vista, big ditch trail and arrowhead school - what an opportunity!	-108.625	45.79427
114	If the city establishes a land trade system to improve access for the public, trading four street side lots of this 1.5acre city-owned property for canal access beside the 4 condo associations would allow the linear BBWA park to continue & access tennis.	-108.555	45.79334
115	This also should be Urban Residential Limited	-108.658	45.81201
116	Unique space in Billings that should strongly be changed to Open Space. Sagebrush, Bitteroot, Meadowlarks, hiking, hunting—>wonderful sense of space	-108.597	45.8167
117	This space should be left as open space public land. It is currently public school trust land that is used for hiking, hunting, and biking.	-108.598	45.81503
118	This is State owned land, there are many people who enjoy hiking, birding and hunting. This is public land that should remain public, saved for conservation and enjoyment. Keep Billings spaces open and sensibly conserved.	-108.598	45.81365
119		-108.596	45.81516
120	This is public land and should remain so for hiking and biking. We use it daily. If this word developed and into housing, it would put a huge burden and strain on Zimmerman Trail and access to Billings west End.	-108.597	45.8206
126	Keep the space designated open space. The beauty is in its expanse and quiet for all to enjoy	-108.596	45.81809
127		-108.571	45.75587
128	This is school trust land that is open space and used daily for recreation such as hiking, hunting, biking. This should remain open space. Many many wild birds live here!	-108.598	45.81866
129	This should stay as open public places available to all of us for hiking, birding, dog walking and biking.	-108.6	45.8164
130	The pleasure of wide open Montana land is being over developed. Please no urban development . Thank you	-108.596	45.81905

131	Keep as designated open space	-108.599	45.81786
132		-108.599	45.8148
133	Turn into designated green space with park, beautiful connection between community centers: library and art museum	-108.509	45.78644
134		-108.598	45.81998
135		-108.507	45.78659
136	Vacant lot should be provided for an extension to the neighboring Yellowstone art museum	-108.508	45.78669
137	Turn into designated open space	-108.597	45.8144
138		-108.551	45.79059
139		-108.592	45.82082
140		-108.597	45.8208
141	Turn into designated open space	-108.597	45.82288
142	Keep as designated open space	-108.597	45.81832
143		-108.603	45.81539
144	Keep as designated open space, green space to separate cultural institutions: art museum and library	-108.509	45.78634
145	Please keep this area open without development	-108.597	45.81711
146	Keep designated as open space	-108.6	45.81871
147	This is open state public land. It should stay open lots of people and animals use it every day. It should not be developed. It should stay natural for birds and wild habitat.	-108.596	45.81506
148	This is state public land. It is used for recreation of not only walkers, bikers, joggers, and hikers. It's also used for multiple animals and birds, including the Meadowlark. Please save this land. Keep it open.	-108.597	45.81653
149	I have for several years had a haikubox directed at the state land, open space area. A Haikubox monitors bird calls and is essential for studying the migration patterns and types of birds found in this habitat. (2nd half of commentary)	-108.596	45.81627
150	To develop this land into urban housing would destroy the habitat of many grassland nesting birds, as well as important stopover for migrating birds.	-108.596	45.81712
151	Families hike and enjoy wildlife here	-108.599	45.82109
152	This should not be developed. Wildlife need this space	-108.599	45.8202
153	Open space for wildlife and family hikes.	-108.608	45.81892
154	Don't urban develop this land	-108.599	45.81719
155	Recreation for families and bird watching. Do not developed please.	-108.606	45.82145
156	As the one paying the property taxes on this land, land that was specifically purchased because of its location and not having neighbors anywhere near, then thinking of it developed makes my skin crawl. Please do not develop this.	-108.595	45.81361
157	This land should be kept open space. If any development (businesses, apartments, even additional houses) is added the effect on Zimmerman trail could cause traffic jams going up and down Zimmerman potentially leading to many fatalities.	-108.598	45.81963
158	Zimmerman is already overloaded. There are three new apartment complexes being built on Zimmerman. If this land were developed it would just add to the congestion. This land should be kept open for recreation purposes, wildlife and open space. Please, No!	-108.598	45.81702
159	I was rear ended 3 weeks ago on Zimmerman North of Rimrock. More traffic on Zimmerman could increase chances of fatalities.	-108.597	45.8226
160		-108.594	45.81784
161	It makes no sense to put houses or apartments at the top of Zimmerman. The bottleneck to Skyway drive would negate anytime it now saves for people accessing the Heights	-108.598	45.81967
162	Please do not develop. Keep open for wildlife and recreation on both sides of inner belt loop.	-108.605	45.8258
163		-108.605	45.82644
164	After serving 21 years in the US Army, I deeply value the solitude and openness that this space affords me to hike with my dog. I ask that as a community we can be good stewards of this space and preserve it for future generations as Magic City grows	-108.596	45.81464
165		-108.594	45.81337
166		-108.596	45.8153
167		-108.597	45.81464
168		-108.597	45.81464
169		-108.597	45.81457
170		-108.596	45.81477
171	When the road was built they put in game tunnels for to access water from the west side to the east. They travel daily.	-108.6	45.81776
172	A place for wildlife, animals and hiking. No development.	-108.596	45.82496
173	Reccomend it be used for wildlife / nature and trails. I do not reccomend development with the significant shift in rock/soil that has occurred since the road was finished. We alrea dy have to listen to all the cars racing on the Inter Belt Loop	-108.596	45.82489
174	This is an incredible open space used by recreationists, wildlife and adds a scenic element that should not be disturbed. Please consider changing this to Open Space.	-108.599	45.82334
178	Odd place for UR. Urban Node or URM to match adjacent properties.	-108.532	45.77014
179	I purchased this property 15 years ago paying for the calue of no development behind me. Please do not devalue my property by developing. Leave as public lands	-108.596	45.81535
180	Please leave undeveloped! This area is full of wildlife and walking trails.	-108.609	45.81799
181	Lovely area, please keep as open space.	-108.597	45.81951
182	Zimmerman Trail cannot handle more traffic. This new development will further congest this area. At least the East side of Skyway should be left undeveloped.	-108.597	45.81403
183	Turn into open designated space	-108.596	45.81593
184		-108.662	45.77886
185		-108.524	45.78205
186		-108.599	45.81232
187	Very accessible, critical sagebrush habitat that provides a wonderful space in a growing city for walking, birding, solitude, and even winter activities such as sledding and snow shoeing. Definitely a space that warrants Open Space designation.	-108.596	45.81504
188	This open space is greatly used by animals and birds and people who bought here for the use and open spaces. New Heights connector road has already hurt animal sightings who were here first. Please reconsider.	-108.596	45.81984
189	Urban residential limited	-108.702	45.80006
190	Open space	-108.704	45.79468
191	The land south of the S Frontage Rd, and west of Wise Lane, to around S 56th St is developing rapidly with no apparent planning. It needs to be included in this effort.	-108.652	45.70298

192	The speed limit on this short street - that has residences, a school, and church, is 35MPH. People take that as a minimum, not max. Its way to fast for neighborhood safety and enjoyment. It is NOT a thruway street.	-108.567	45.79134
193	This land and adjoining parcels are owned/operated by Knife River for their aggregate operations (and mining). The thought of it becoming a County Neighborhood in the next 25 yrs is doubtful.	-108.661	45.71569
194	The ag land in this quarter section is owned by JTL (Knife River). Is the intention to allow them to expand their mining operations?	-108.66	45.72468
195	This area has been a great place to bike and walk. I see lots of people enjoying this space;I think this is because it's an area you can enjoy the scenery of the plains and some calm/quiet. That would go away if urban housing was put here.	-108.599	45.81436
196		-108.456	45.69523
197	Wider bike lane to get to trails and airport	-108.525	45.80022
198	Designate for open space Abby & Elliott Gaitonde	-108.597	45.81563
199		-108.607	45.82094
200	Open land; wildlife, nature, outdoor activities. Urbanization will exponentially increase traffic yp and down Zimmerman trail	-108.599	45.81115
201	Don't take away our state land access. I go out here and hunt and walk my dogs. And spend time with my kids and family out there.	-108.607	45.8176
202	Purple area between inter belt loop and ward 4	-108.574	45.77399
203		-108.561	45.8243
204		-108.598	45.81645
205	Constantly see people riding bikes and running and walking this nature area.	-108.598	45.81634
206	Nature area	-108.6	45.81601
207	Wildlife area	-108.598	45.82254
208	This land is used by many people and all of Montana's beautiful wildlife it can not be further urbanized	-108.603	45.80999
209		-108.598	45.80904
210		-108.599	45.81013
211		-108.599	45.81339
212		-108.6	45.81159
213		-108.598	45.80906
214		-108.609	45.81392
215		-108.608	45.81361
216		-108.614	45.8185
217		-108.608	45.81185
218		-108.595	45.81144
219		-108.593	45.81036
220		-108.609	45.81109
221		-108.605	45.81207
222	Lots of hikes during summer and snowshoeing in winter. Please do not develop this natural area.	-108.596	45.8213
223	Many fond memories of hiking this area. To put homes here would be ashame.	-108.598	45.82436
224		-108.597	45.82041
225	My family walks here often and treasure the natural beauty of it. To develop it would be devastating.	-108.599	45.81939
226	Beautiful area, please leave as open space	-108.596	45.81221
227	I purchased this property 15 years ago that backs up to state PUBLIC land. If this gets sold and houses get built behind my house my value will considerably drop. Public land should remain Public land.	-108.596	45.81528
228	PI? I believe this was the property acquired last November with FAA funds to essentially become part of the airport grouds.	-108.532	45.81552
229	Please make the castle (5650 Canyonwoods Dr.) a multifamily zone to attract a 'active living' senior community use - or something similar.	-108.658	45.81668
230	Doesn't the draft Heights plan identify these parcels as targets for denser development? Given the presence of Five Mile Road, perhaps UR and/or URM would be worth considering.	-108.43	45.85387
231	Complete Sidewalk on east side of 12th - DANGEROUS for peds	-108.546	45.78025
232	Complete Sidewalk on E side of 12th	-108.546	45.77952
233	Create Wast City Bypass for trucks	-108.673	45.85691
234	This would be another place to trade a bit of park space here to connect the two existing linear parks along the ditch. Also Ping circle should match its neighbors and allow duplexes etc.	-108.451	45.82597
235	I would agree with urban node here - but not for storage units. It seems like the most visited state park could use some food and even lodging options overlooking the lake.	-108.474	45.84172
236	If you're looking to unload parkland, few parcels make more sense than this acre patch steps away from a large state park. Work with the state and Homefront to create some workforce housing here.	-108.479	45.84569
237	Strongly disagree with the single family shill here. Any area with this level of amenities should be opened to Urban Residential Mixed to fully justify and realize value gains from the infrastructure. Please acknowledge water, power, snow plows required!	-108.488	45.83989
238	Reconsider this block park to trade with developers for a linear park along the canal -- a bonus for walkers, wildlife, seniors and children biking to the lake.	-108.497	45.84606
239	There is a two acre parcel that would be an interesting node continuation providing canalised dining and living in a low rise canal-facing town square development would add a new lifestyle dimension to the heights.	-108.478	45.80887
240	It seems like making this UR like the surrounding area would give the owners flexibility to divide a 4000sqft home or upzone their acre lot with a ADU if they want to. These options make so much sense in the area between the hospital and university.	-108.53	45.79401
241	The Ping Circle development should be Urban Residential.	-108.455	45.82581
242	Keep public /state land/open undeveloped and accessible by all residents to enjoy the outdoors	-108.609	45.81934
243	this area would be good for mixed commercial/residential use	-108.533	45.74656
244	mixed use higher intensity commercial	-108.529	45.75028
245	commercial/residential mixed use	-108.542	45.74519
246	This area, while it has higher zoning currently, I believe the more appropriate place type would be Urban Residential, rather than Urban Node.	-108.565	45.73815
247	Please don't develop this. Billings is getting too big and the water supply system can't handle all the demand.	-108.605	45.82312
248	PI for Grace United Methodist.	-108.566	45.78537
249	This half-block should be Urban Node. This is a midcentury strip mall, mostly with offices and small-scale medical, that provides a nice transition between the old Cine 7 property to the south and the apartments/YWCA to the north.	-108.54	45.77784

250	These properties currently labelled UR should be either Urban Node or URM. There are currently businesses on these parcels, and given the surrounding placetypes, aspiring for UR here doesn't make sense.	-108.542	45.77999
251	I don’t want the BLM land subdivided into housing.	-108.625	45.8335
252	Leave green spaces! This is our neighborhood!	-108.498	45.81387
253	Our house only has 3 feet between the back of our house and where the state trust land starts. Any housing development would impose significant burden on us when roofing and foundation work needs to be done. Please keep this area as open space	-108.597	45.81325
254	Leave this land alone! This concept that every open space needs to be filled with workforce housing will make our city too densely populated, and people will move away!	-108.479	45.84557
255	These county-owned parking lots are unnecessary with so much other parking and the transit hub across the street. The county should coordinate with SD2, MT State or Homefront to create a mixed-use mini-plaza to capitalize on transport infrastructure	-108.503	45.78525
256	The city should make this green space URM- a multifamily infill condo tower to add to their tax base instead of their maintenance bill. See the tower across from Rocky for reference- it's a real boon to the tax base. Make use of Par 3 proximity!	-108.565	45.76946
257	There is an area here that could be developed as a golf course facing condo community here with would assist with the value capture of this vast green space. It would help the city balance its budget.	-108.562	45.76393
258	in response to other post - YAM's additional space is The Vault. They don't need any further costs. The could coordinate with Homefront to set up artists' residence on the two adjoining properties owned by Homefront north of The Vault.	-108.507	45.78663
259	A TIF-subsidized Gazette building purchase by St John's would be a good partnership to create a downtown, Arts District senior living with an event lawn (resident parking in warehouse). SJ is already present and active senior downtown living is growing.	-108.508	45.78542
260	Consider flanking the entire park in URM to thicken up these ageing properties as they're replaced and capture value from pool improvements to add to the upkeep and maintenance pot. Few neighborhoods are as well-poised for future value gain.	-108.502	45.77396
261	Response: what about opening up Commercial mixed all the way over to 31st above the park to encourage updating failing properties to their highest and best use while creating space for local small businesses in a 'live above the shop model'?	-108.505	45.77386
262	Why not give this city-owned part of 33rd to the Y to use as an outdoor space	-108.515	45.78232
263		-108.516	45.78762
264	These little parks are very silly. Consider removing the interior road and gifting them to the adjacent property owner, better than maintaining them.	-108.517	45.78633
265	This is another city park that could provide some Parkside housing along Kalmar Dr.	-108.547	45.76379
266	This node area would be one to keep an eye on for long term light rail 'transit oriented development' to link the city with the next level of public transport. You could begin negotiating with BNSF now for rail and rail bed access.	-108.53	45.7696
267	This node area would be one to keep an eye on for long term light rail 'transit oriented development' to link the city with the next level of public transport. You could begin negotiating with BNSF now for rail and rail bed access.	-108.53	45.76966
268	This node area would be one to keep an eye on for long term light rail 'transit oriented development' to link the city with the next level of public transport. You could begin negotiating with BNSF now for rail and rail bed access.	-108.567	45.75241
269	This node area would be one to keep an eye on for long term light rail 'transit oriented development' to link the city with the next level of public transport. You could begin negotiating with BNSF now for rail and rail bed access.	-108.546	45.7599
270	Response to the response: Why encourage more commercial development in the interior of South Side triangle when that's more needed along S. 27th and 1st Ave. S? The 'live above the shop model' seems better suited to the EBURD.	-108.504	45.77399
271	I like the proposed urban node!	-108.537	45.82845
272	mostly city land oaths half block. Why not community gardens on the vacant lots?	-108.498	45.77674
273	This is county land on this whole block. Why is this not a prison garden project to reduce food costs and teach skills? Even planting potatoes on the vacant lots would yield a harvest and improve the appearance.	-108.498	45.77674
274	These lots are privately owned but the owners may allow seasonal gardens if there was interest.	-108.499	45.77756
275	The new Urban Residential designation should allow for duplexes on residential lots across all zoning sub-types (N1, N2, N3, N4). Holding on to the "no duplexes" rule for N3 and N4 is bad policy in a growing city that badly needs more housing and density.	-108.586	45.79528
276	Perhaps the city could sell the 1133 Howard lot to the multifamily to save maintenance and add to tax base or make it a pocket park accessible to all.	-108.545	45.77332
277	The is a little strip of P1 drainage ditch here between Terry and Miles. Perhaps it could be rethought and have a public use access?	-108.544	45.77457
278	1260 Yellowstone and the neighboring lot to the west would make better park than a housing project. This seasonal waterfall with mature trees is a cool urban oasis which backs up to county property on the southern edge. Provides awareness of water source.	-108.548	45.77873
279	Keep this as openspace. This area is currently used by west end residents for recreation. YCC has had years to challenge P1 zone, has not done so. YCC has attempted to cut off public access to these trails in the past. Public has adverse possession	-108.655	45.81161
280	URL here is contrary to zoning policy prohibiting N zones along arterials. Should this area develop in the city, it should be UN or URM	-108.535	45.74531
281	URL should be mapped on existing N3 only. This area should be UR. URL is a category that will lock in unsustainable low density whose tax revenue won't support maintenance	-108.487	45.76059
282	much of this area is heavy commercial/ light industrial. URL makes no sense for existing or preferred development here. Should be UR, URM, or EI	-108.582	45.73666
283	commercial	-108.466	45.84312
284	Commercial	-108.429	45.8482
285	commercial	-108.537	45.82763
286	Response to 'green space'. Looking at MT's tax parcel map it's clear that DT needs private development. Envision a walkable/mixed town center encompassing 'Y to YAM' creating new housing while optimising vast existing (SD2, city) parking as an event plaza	-108.509	45.78585
287	Agree w other commenter. URM here and upzone next to public amenities wherever possible to justify and capture the value of that public investment to pay for more nice stuff! PLAN - to cover your budget. Incentivize infill over sprawl. Stop annexing.	-108.504	45.79247

288	A stormwater drain is buried under these medians (P1 green). Why not upgrade to open, low- maintenance bioswales with an E. Plainview tree-lined, protected path, linking Terry, over the tracks (long term) to Amend park. www.youtube.com/watch?v=nKdbUfnze5E	-108.547	45.76923
289	A stormwater drain is buried under these medians (P1 green). Why not upgrade to open, low- maintenance bioswales with an E. Plainview tree-lined, protected path, linking Terry, over the tracks (long term) to Amend park www.youtube.com/watch?v=tGHzOKXhp-M	-108.547	45.76628
290	The state could spur awareness in a canal district here: honor history, explore connections and improve the academic- medical link with some canal facing features besides parking (small amphitheater or food truck court?) www.youtube.com/shorts/UTaReU5gqI8	-108.518	45.79589
291	This is definitely the place to have the state negotiate with BBWA to allow cy-walk trail linking tax-exempt university to this 'node' area to increase interaction and public ROI. PLAN an activated airport entry vibe! www.youtube.com/watch?v=6jYi8UA4P2I	-108.517	45.79631
292	Consider setting this parking lot up for post-pool food truck time during the summer months. Provide spaces / amenities and charge rent. Link canal path with small bridge here. Make parks generate income besides taxes. S park pool - same strategy.	-108.572	45.78726
293	Hmm - single family? Just keep the Simpson St. connector trail on your radar as things pick up in the wake of the Amend Park hockey project.	-108.515	45.75901
294	There are so many medical professionals coming our way to support the medical corridor improvements - wouldn't URM make more sense for this stripe behind the node as this area responds to the needs of new nurses, medical residency students etc?	-108.515	45.79513
295	Not really following the 'node' desigation here. This area needs a clear walkable (lighted?) path leading to Hefner's Steps with historical markers. Ensure that it is P1 -- not... node.	-108.521	45.79945
296	Please share the tax income / acre (see Urban3 for info) for each Ward on the Billings 2045 project page and show us how much each Ward covers from its water, road, snow plow etc. bill. Please make any annexed property pencil out within the Ward.	-108.487	45.84726
297	Can we ask for a roundabout here with a two way 6th Avenue?	-108.515	45.78408
298	This corredor lies in the middle of an urban wilderness area. No future development (commercial or residential, beyond the existing inner belt loop road should be allowed in this area to ensure that the remaining portion of this state land remains natural	-108.604	45.81652
299	This parcel of state land (both sides of the belt loop) has long been used as a wildlands recreation area by Billings residents and is important for that purpose. No new development should be allowed on this land in order to preserve its natural character	-108.6	45.81552
300	All the flat land on both sides of what will be a major arterial connecting to Interstate 90/94 to Highway 87 and eventually along Sindelar Road and Alkali Creek Rd to Highway 3 needs to be set aside for Commercial/Light Industrial/H ind use/Tax base	-108.437	45.84479
301	All this land along Interstate 90 and the Interchange should be presumptively zoned Commercial/Lt Industrial and Industrial as it is not suitable for housing but can create a good tax base. Look at the development at King and Zoo Drive Interchanges	-108.534	45.74799
302	This land should be presumptively zoned Industrial to fit the character across the highway and make use of interstate access and arterials	-108.488	45.7592
303		-108.564	45.74554
304		-108.57	45.74314
305		-108.602	45.72579
306		-108.612	45.71956
307		-108.621	45.71832
308		-108.656	45.7096
309		-108.671	45.70423
310		-108.632	45.7143
311	Employment Industrial use for all land within 1/2 to 1 mile from Interstate	-108.602	45.72592
312	Employment Industrial use is appropriate	-108.621	45.71863
313	Employment Industrial is appropriate	-108.612	45.71959
314	Employment Industrial is the highest and best use. Good tax base!	-108.582	45.7367
315	By continuing to annex far flung properties you are building a city you can't afford. The suburban residents often demand more open space and single family zoning. They survive - water, electricity, snow plowing— on the backs of the small urban lots. Stop	-108.516	45.72488
316	If the Rose Park housing units are set to be rebuilt soon, it would be a good place to add some density with great access to schools and parks.	-108.573	45.78669
317	If senior home area West Park Village is 'node', it seems like Grand Springs area should be too. Even more reason to gather local business owners for a collective walk-friendly 'canal district' rebranding. https://10best.usatoday.com/awards/best-riverwalk	-108.586	45.7836
318	This multifamily to Ave B area is the perfect place for a car-less canal crossing to local businesses.	-108.579	45.78507
319	This neighborhood is large lot, large house and should be zoned for Single-family detached.	-108.487	45.80537
320	This neighborhood should show as single family only.	-108.487	45.80562
321		-108.487	45.80547
322		-108.487	45.80591
323	This neighborhood should be single-family detached only, as it is large home/large lot.	-108.488	45.80485
324	This neighborhood should be single-family detached only, as it is large home/large lot.	-108.49	45.80425
325	This neighborhood should be single-family detached only, as it is large home/large lot.	-108.49	45.80378
326	This neighborhood should be single-family detached only, as it is large home/large lot.	-108.488	45.80437
327	This neighborhood should be single-family detached only, as it is large home/large lot.	-108.489	45.80511
328	This neighborhood should be single-family detached only, as it is large home/large lot.	-108.487	45.80509
329	This neighborhood should be single-family detached only, as it is large home/large lot.	-108.488	45.80476
330	This neighborhood should be single-family detached only, as it is large home/large lot.	-108.492	45.8048
331	This neighborhood should be single-family detached only, as it is large home/large lot.	-108.492	45.80557
332	If Billings City does not have the money to rectify the road infrastructure between Rimrock and Grand along Zimmerman, the city has no right to continue developing along this corridor. Either alongside Zimmerman or up above the rim rocks.	-108.601	45.78914
333	Friendship House owns parcels along the ROW and wants to rezone to P2, same as the property to the west.	-108.502	45.77171