

SECTION IN THE APPENDIX:

- Community Engagement Catalog
- Housing Study
- Parking Study

SUPPORTING AND TECHNICAL DOCUMENTS

The Appendix to this Downtown Master Plan contains longer-form supporting and technical documentation to provide valuable background information that was used to inform the various plan recommendations, strategies, catalytic projects and initiatives found throughout the Plan.

The Community Engagement Catalog is a collection of images and compiled inputs highlighting the feedback received from the community throughout the process. In instances where recommendations would benefit from a more nuanced understanding of the intent(s) expressed by the community, this compilation of data can be a useful resource.

The Housing Study - including its Feasibility Analysis component - and the Parking Study can be utilized as standalone documents to inform other work program elements or initiatives that the City may be working on. For the purposes of the Downtown Master Plan, however, the technical analysis and data contained in these documents played an instrumental role in having more nuanced conversations with community members around how to best to implement their vision(s) for the Downtown, as well as informing the most effective steps that need to be taken to do so.

Preliminary Visioning Survey – Results Summary

- **391 Participants**

- **Key Takeaways:**

- Majority of participants were Livingston residents who spend time in the Downtown daily or weekly
- About 1/3 of participants indicated that they live and/or work in Downtown
- About 70% of participants indicated that Shopping & Dining are what bring them to Downtown most often, reinforcing an emphasis on entertainment in the Downtown
 - Events were also a strong draw for visitors, whereas Events and “Socializing with my community” were roughly equivalent for residents

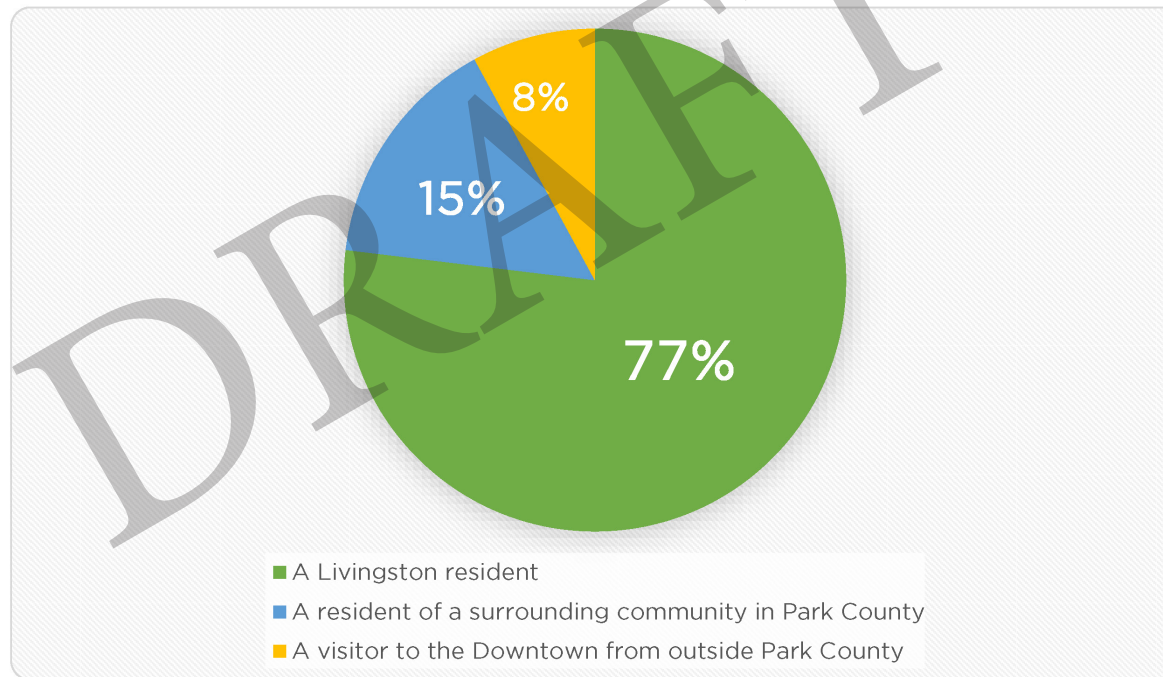
Preliminary Visioning Survey – Results Summary

• Key Takeaways *(continued)*:

- Consistent themes in the open-ended responses included:
 - Favorite Part of Downtown:
 - A strong emphasis on the community, as well as an appreciation of the history/historic architecture/main street character & charm in the Downtown
 - Vision for Downtown:
 - Reinforcing the favorite part of Downtown, a desire to maintain and preserve the community and character, while making it more vibrant and accessible (including from a parking standpoint)
 - One thing to improve:
 - Parking was the most frequent response, with safety, diversity of shopping options, and additional green space/trees also very frequently mentioned.
 - “Nothing” was also a popular response, reinforcing the desire to maintain and preserve the character of the Downtown.

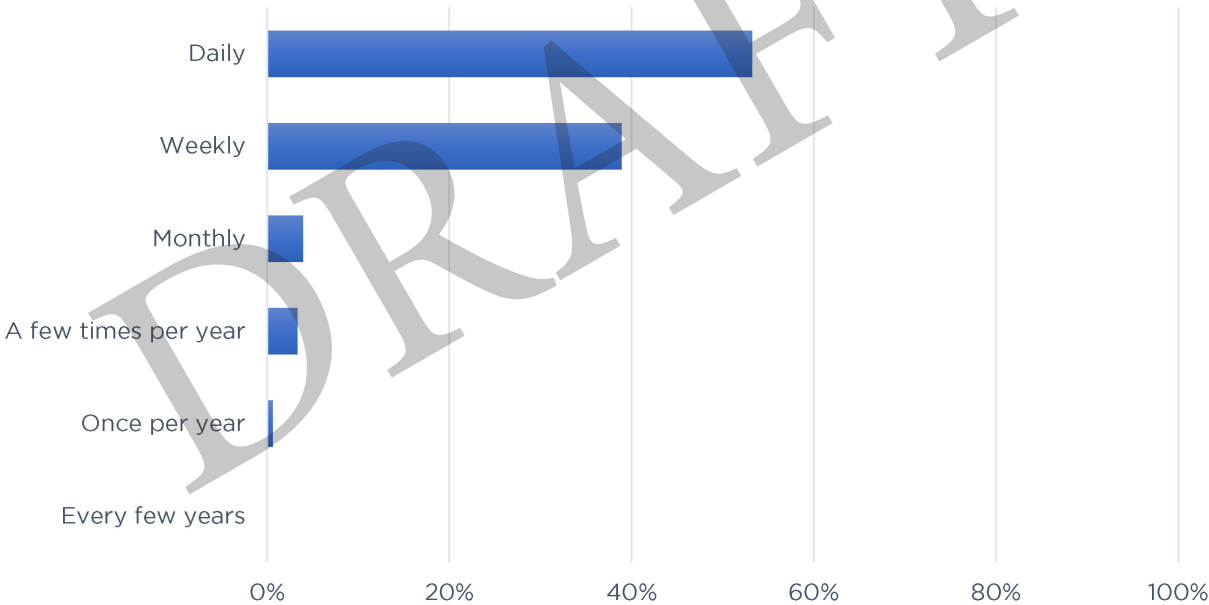
Preliminary Visioning Survey - Results Summary

- Of the 391 Participants:



Preliminary Visioning Survey – Results Summary

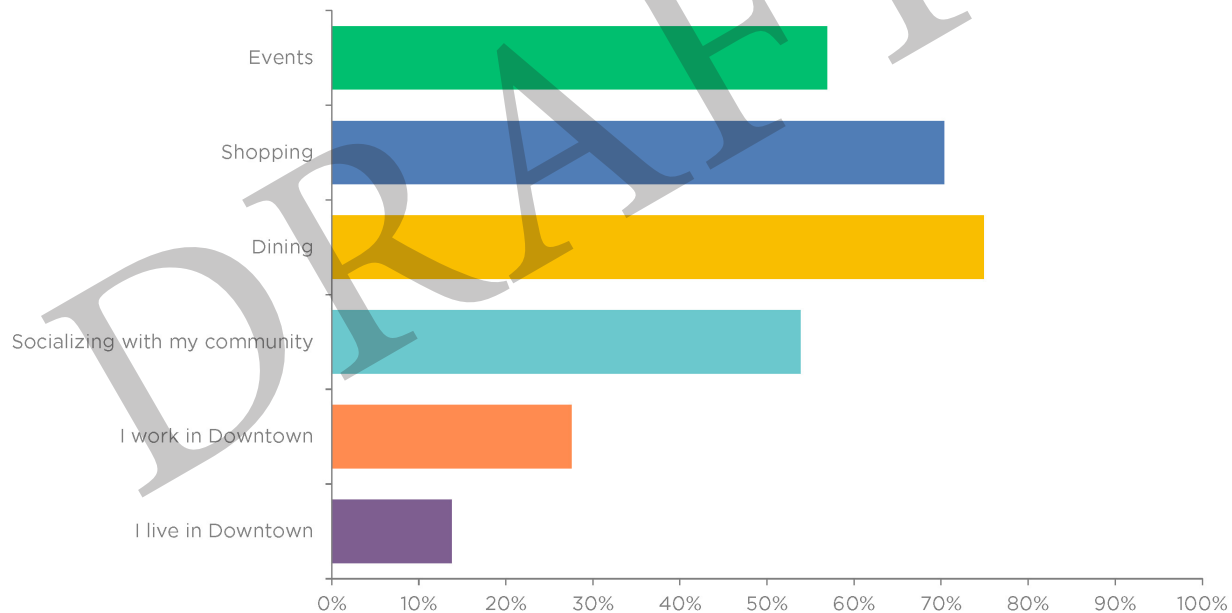
- Residents (of Livingston and/or Park County):
 - How often do you spend time in Downtown Livingston?



COMMUNITY ENGAGEMENT CATALOG

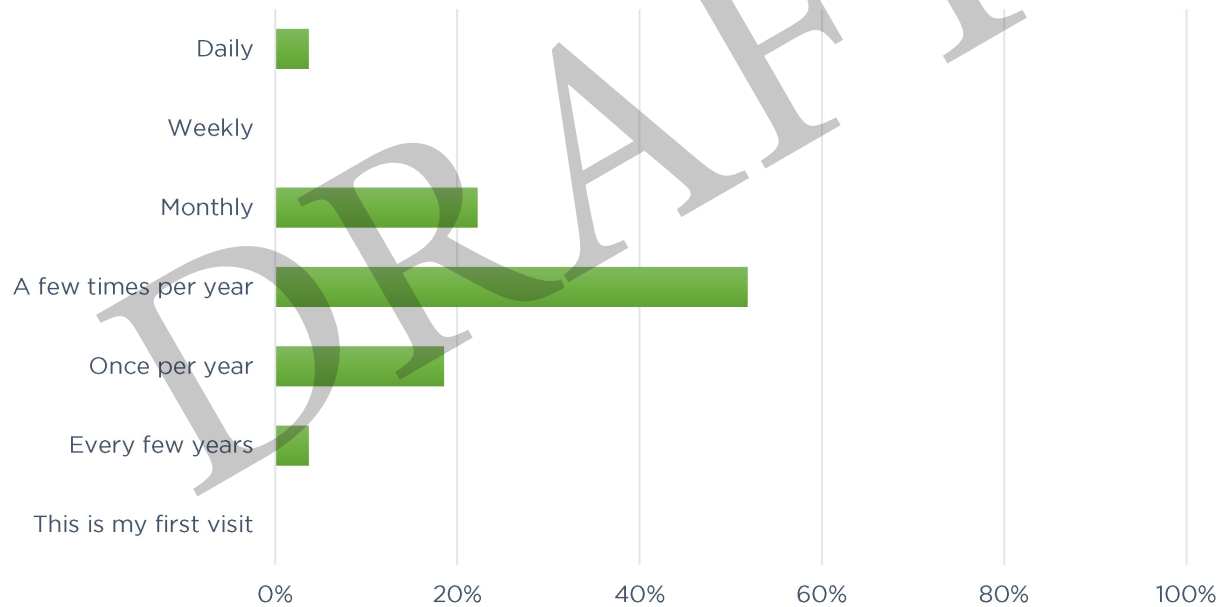
Preliminary Visioning Survey – Results Summary

- Residents (of Livingston and/or Park County):
 - What brings you to Downtown Livingston most often? *(Select all that apply)*



Preliminary Visioning Survey – Results Summary

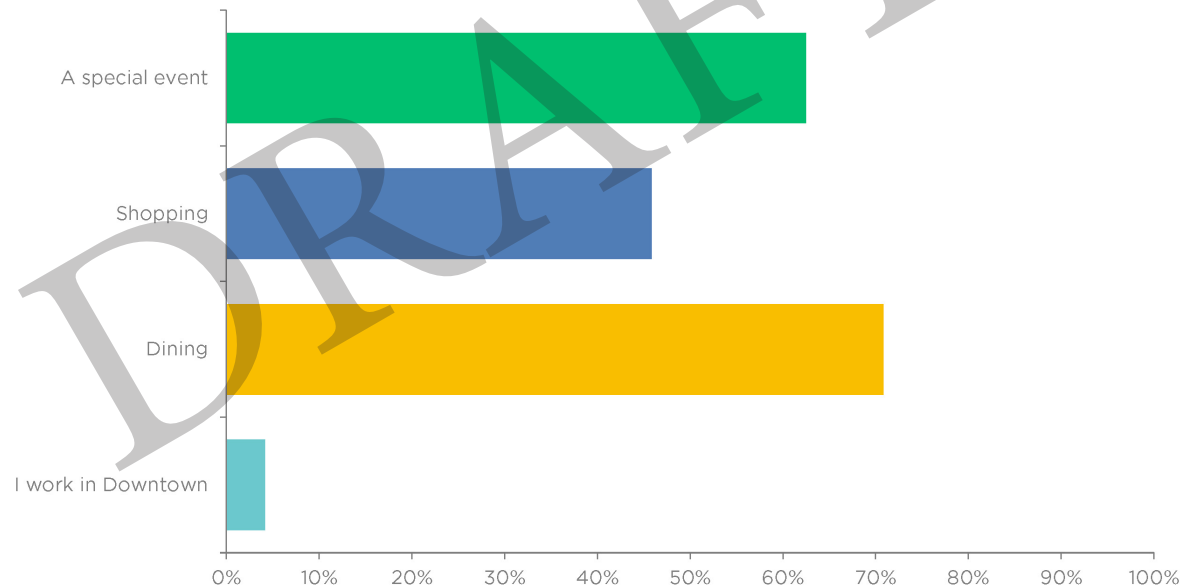
- **Visitors to Downtown Livingston from outside the County:**
 - How often do you spend time in Downtown Livingston?



COMMUNITY ENGAGEMENT CATALOG

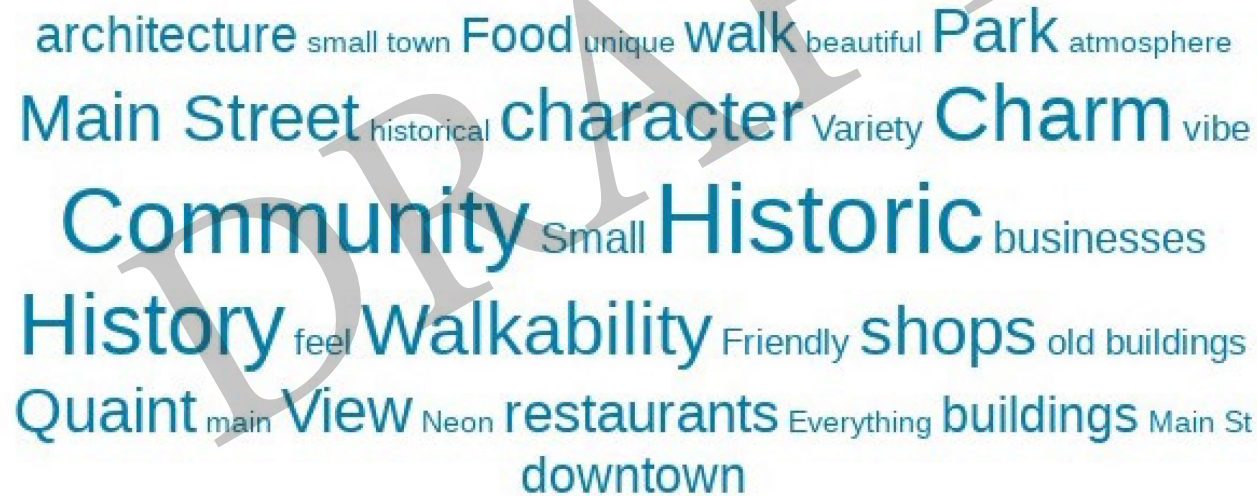
Preliminary Visioning Survey – Results Summary

- **Visitors to Downtown Livingston from outside the County:**
 - On this visit (or your most recent visit) what brings (brought) you to Downtown Livingston? *(Select all that apply)*



Preliminary Visioning Survey – Results Summary

- **Residents** (of Livingston and/or Park County):
 - In one word, what is your favorite part of Downtown Livingston?



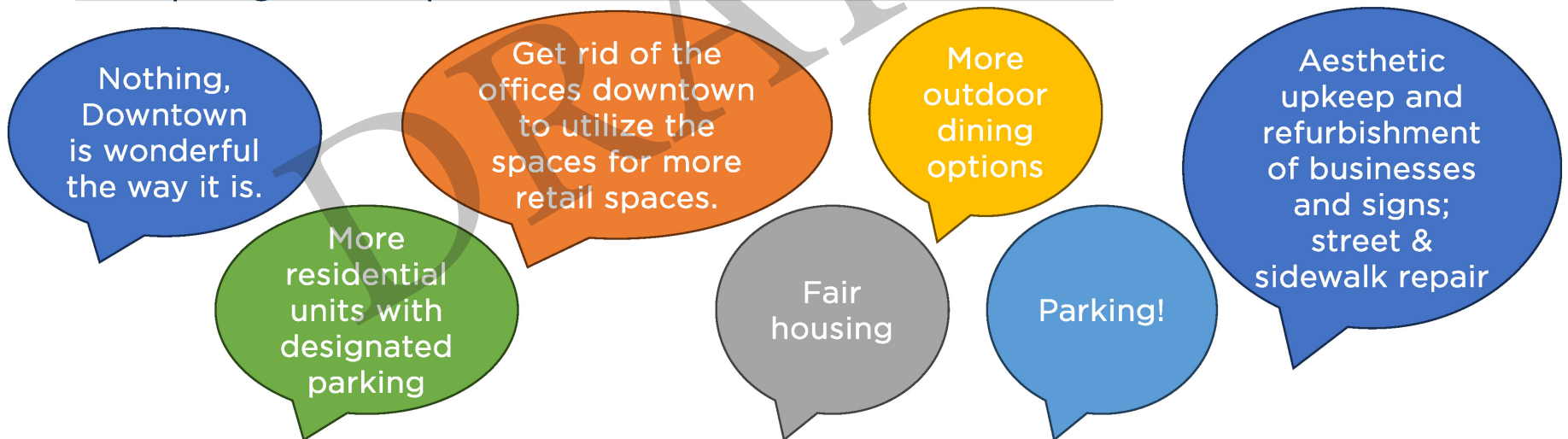
COMMUNITY ENGAGEMENT CATALOG

Preliminary Visioning Survey – Results Summary

- **All Participants:**

- If you could improve one thing about your experience in Downtown Livingston, what would it be?

- Sampling of Responses with Consistent Themes:



Preliminary Visioning Survey – Results Summary

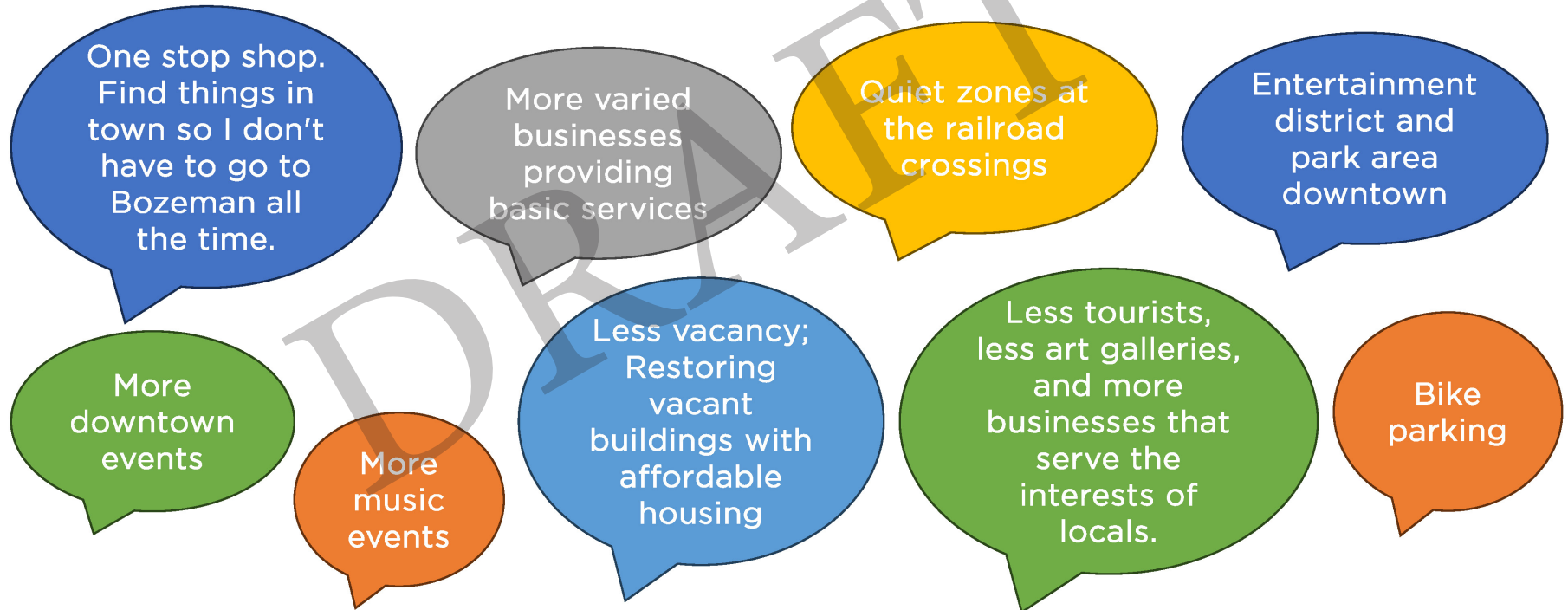
- Sampling of Responses with Consistent Themes (*continued*):



COMMUNITY ENGAGEMENT CATALOG

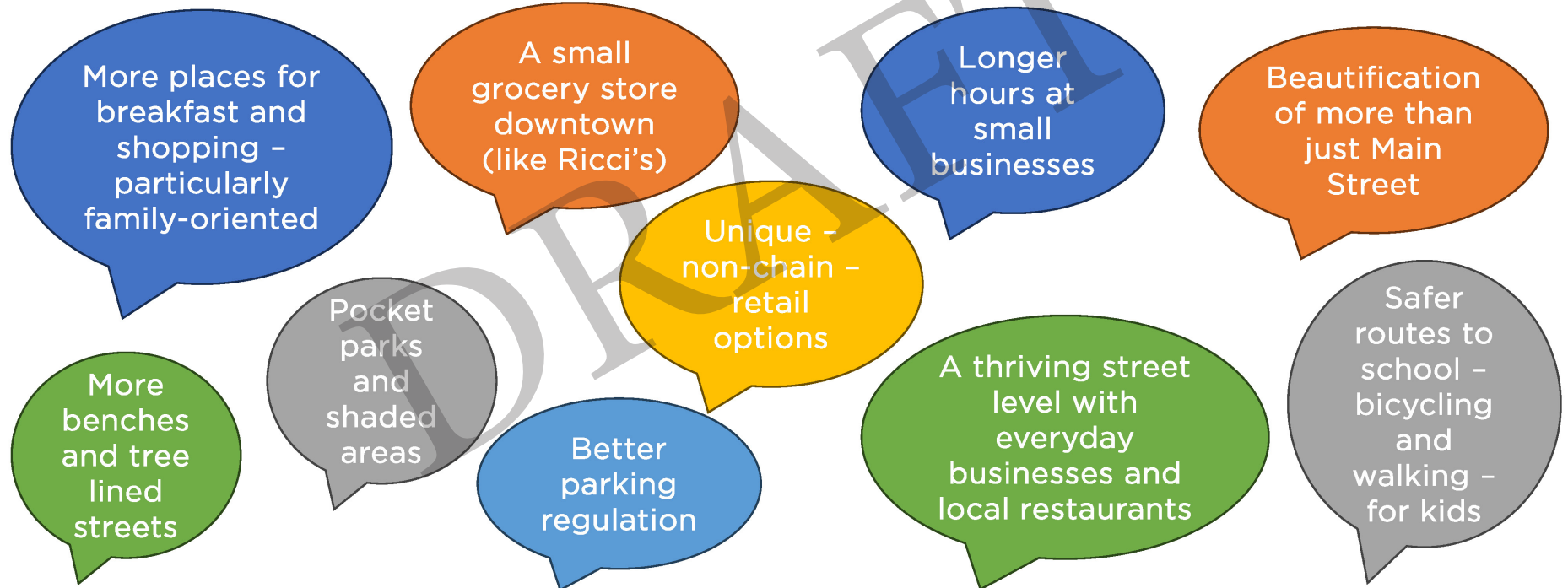
Preliminary Visioning Survey - Results Summary

- Sampling of Responses with Consistent Themes (continued):



Preliminary Visioning Survey – Results Summary

- Sampling of Responses with Consistent Themes (*continued*):



COMMUNITY ENGAGEMENT CATALOG

Preliminary Visioning Survey – Results Summary

- **Residents** (of Livingston and/or Park County):
 - In one word, what would be your vision for the future of Downtown Livingston?



BUSINESS OWNER BREAKFAST 11.15

VISION: INCREASE WAYS TO GET AROUND

- ◆ HOW TO "CAPTURE" VISITATION & PULL VISITORS FROM HWY. INTO DOWNTOWN
- ◆ MAKE KNOWN EASE OF ACCESS FROM HWY. → CO-MARKET BUSINESSES
- ◆ EMPHASIZE CO-BENEFITS TO BUSINESS USES → GET WORD OUT ON COLLABORATION & EVENTS
- ◆ NEED FOR BASIC SERVICES → "UNDERWEAR & SOCKS!" → UNDERSTAND OTHER BUSINESS OFFERINGS
- ◆ CONNECT UNDER-DEVELOPED, INDUSTRIAL AREAS → CLEAN & SAFE & ACCESSIBLE

WEAKNESSES

- OFFICES USING STOREFRONT SPACES
- COULD USE ANCHOR STORES → ESP. S. OF LEWIS
- RELUCTANCE TO WALK A FEW BLOCKS TO VISIT BUSINESSES
- PARKING NEEDS CAUSE STRAIN ON N HOODS → UTILIZE SOME PRIVATE SPACES w/ CREATIVE SOLUTIONS? → PRIORITIZE ACCESSIBLE NEED → DEDICATED BUSINESS OWNER PARKING
- LACK OF PUBLIC RESTROOMS
- LACK OF EFFICIENT STRIPING/MARKING FOR PARALLEL PARKING
- 2-HR LIMIT IS CHALLENGING FOR LONG-TERM USE BUSINESS USE NEEDS → ie SPAS
- WEEKEND STRAIN ON PARKING CAPACITY → NEED FOR RESIDENT PARKING & NEW DEVELOPMENT

- + TELL "UNTOLD" STORIES OF DOWNTOWN!
- + "WORK TO SCHOOL" PROGRAMS
- + HOUSING ALONG RAILROAD OWNED PROPERTIES

THREATS

- **WORKFORCE SHORTAGE DIRE** → LACK OF SKILLED LABOR
- LACK OF HOUSING AVAILABILITY → AFFORDABILITY & HIGH RENTAL RATES
- CYCLE OF LACK OF HOUSING INCREASING LABOR COST & OPERATIONS COST
- REMOTE WORKFORCE FURTHER STRAINING HOUSING SHORTAGE → LINE IN PARADISE & WORK REMOTE
- LACK OF HIGH SCHOOLERS IN WORKFORCE
- PARKING STRAIN BY STRS
- BOZEMAN'S LACK OF AFFORDABILITY
- LACK OF PUBLIC TRANSIT PRECLUDING WORKFORCE OPPORTUNITY
- STR TAKING AFFORDABLE HOUSING CAPACITY

STRENGTHS

- + WE ARE A DESTINATION → LOVING PLACE TO DEATH
- + RIVER & ACTIVITIES
- + WORLD-CLASS MUSEUM & ASSETS
- + ICONIC SMALL, MONTANA TOWN
- + LOCALLY OWNED, QUIRKY BUSINESSES → NO NATIONAL CHAINS
- + ARTS PRESENCE - OF ALL KINDS!
- + STRONG BID.
- + LACK OF INFILL → TRANSITION TO N HOOD
- + UNPRETENTIOUS (BUT PROUD)
- + NATIONAL PARK CONNECTION & HISTORY

OPPORTUNITIES

- RESTAURANT CLOSURES / STAGGERED SCHEDULES → WORKFORCE SHORTAGE
- CHALLENGE TO COMMUTE W/ VISIT IN WINTER → PASSENGER RAIL / BUS SERVICES TO/FROM BOZEMAN, ETC.
- + HELP LOCAL BUSINESSES PROBLEM-SOLVE → LACK HOUSING TO EMPLOYMENT → SHARED BUSINESSES → HOUSING → MODULAR?
- + INCREASED PARKING CAPACITY w/ DIFFERENT CONFIGURATIONS
- + SHUTTLE TO/FROM PARK & AROUND DOWNTOWN CORE
- + MIXED-USE SPACES → SEASONAL USE CHANGE → MORNING/EVENING POP-UP
- + FOOD TRUCK / POP-UP TO SUPPLEMENT DEMAND → LUNCH (STRAIN LABOR)

ONE CHANGE:

- 2ND-STORY DEVELOPMENT
- REVITALIZE/INFILL
- RETAIL 1ST FLOORS
- BUSINESSES LIT AT NIGHT
- MORE BUSINESS COLLAB.
- CLEANER STREETS & ALLEYS
- CIGARETTE BUTT STATIONS
- LANDSCAPING
- MIXED-USE HOTEL

Notes from a SWOT (Strengths, Weaknesses, Opportunities, Threats) Analysis conducted at the Business Owner Breakfast

COMMUNITY ENGAGEMENT CATALOG

URA STRATEGY WORKSHOP

VISION(S)

- ABILITY FOR LOCAL ENTREPRENEURS
- LOCAL BUSINESSES VS. CHAINS
- UNIQUENESS!
- PLACES FOR ALL TO ENJOY
- EVENT-FOCUSED
- AFFORDABLE
- INFORMAL & QUIRKY
- PARKING MANAGEMENT w/o GARAGE

- EASY TO ACCESS / CONNECTED
⇒ ESP. NON-VEHICULAR
- SAFETY & PLACEMAKING
⇒ CONSISTENT ACTIVATION
- PARK BEAUTIFICATION
- LEVERAGE ALL OF URA DISTRICT
⇒ IMPROVEMENTS BEYOND MAIN
- BELONGING FOR ALL - MAKERS, RESIDENTS
⇒ ENTREPRENEURIAL
- DECREASED VACANCY / UNDERUTILIZATION
- "AFTER-HOURS" DOWNTOWN ACTIVATION
- HIGHER PAYING JOBS & MORE OF THEM
- BUS CONNECTIVITY
- ADAPTIVE REUSE

ROLES / PROGRAMS

- PARKING FUNDING
- WAYFINDING
- POCKET PARKS / PLAZAS
- BUSINESS ATTRACTION
- PROPERTY REDEVELOPMENT / LAND ACQUISITION
- FUNDRAISING BEYOND TIF
- HWY. PLACEMAKING & ACCESS (RRFBs)
↳ IN PARK ST.
- BE "NOT JUST ONE POSTCARD VIEW"
- MARKETING / COMMUNICATION ON TIF BENEFITS
↳ INCLUDING "HOW TO" BROCHURES
- PROPERTY STABILIZATION
↳ ESP. ALONG PARK ST. (RAIL OWNERSHIP)
"ANOTHER DISTRICT?"

- RETURN TO RAILROAD ROOTS
- MORE PEOPLE LIVING DOWNTOWN
⇒ 2ND STORY CONVERSIONS
- VIBRANCE ↻
- BODEGA / DAILY NEEDS CONVENIENCE
- AVOID OUT-OF-SCALE DEVELOPMENT
⇒ "CANYONS"
- TREES & SHADE ⇒ NATURALIZE
- PARKING MANAGEMENT
⇒ 2ND/3RD FOR PARKING IN INVITING BLDGS.
- BEAUTIFICATION
⇒ BURDEN OFF OF BUSINESSES
- SAFETY
- SHORT- AND LONG-TERM GOALS / FUNDING
- WORKFORCE HOUSING

- LOCAL BUSINESS SUPPORT
⇒ LESSON RISK
- DIVERSIFY USES DOWNTOWN
- ALIGNMENT w/HISTORIC PRESERVATION
- LOWER POLLUTION/WASTE
- OWN PROPERTY / WORK TO DEVELOP
⇒ INVOLVE IN IDEATION
- CROSS-COLLABORATION w/BID & CITY DEPARTMENTS WHEN POSSIBLE
- COHESION & PROACTIVE FUNDING

MOST NEEDED IMPROVEMENTS

- COMMUNITY BENEFIT BY ACTIVATION OF UNDERUTILIZED SPACES
⇒ GATHERING, NON-COMMERCIAL SPACES
- UTILIZATION OF EXISTING SPACE + BEYOND JUST MAIN STREET ⇒ CIVIC CENTER
- SOLVE THE PARKING PROBLEM
⇒ CALIBRATE AVAILABILITY TO EVENTS & DAILY USE
- A PLACE TO VISIT, GATHER & PATRONIZE FOR ALL AGES & MEANS
⇒ LEVERAGE LOCAL CREATIVES
↳ PARK COUNTY ART GRANT TIES?

Notes from November 14, 2023 URA Strategy Workshop

COMMUNITY ENGAGEMENT CATALOG

COMMUNITY WORKSHOP & OPEN HOUSE EXERCISES - SUMMARIZED INPUTS

NOVEMBER 14TH - 16TH, 2023

Livingston
DOWNTOWN MASTER PLAN

LAND USE & ACTIVATION EXERCISE

At the Community Workshop / Charrette, and at the Community Open House, participants were asked to collaborate with other groups of attendees to express their map-based ideas within the Downtown Master Plan Study Area.

For this exercise, participants focused on the land uses and activation opportunities they would like to see in the future within the Downtown, and placed color-coded dots on areas to indicate those preferences. In addition, participants were encouraged to add notes to the map with markers and post-it notes to further elaborate on their specific preferences.

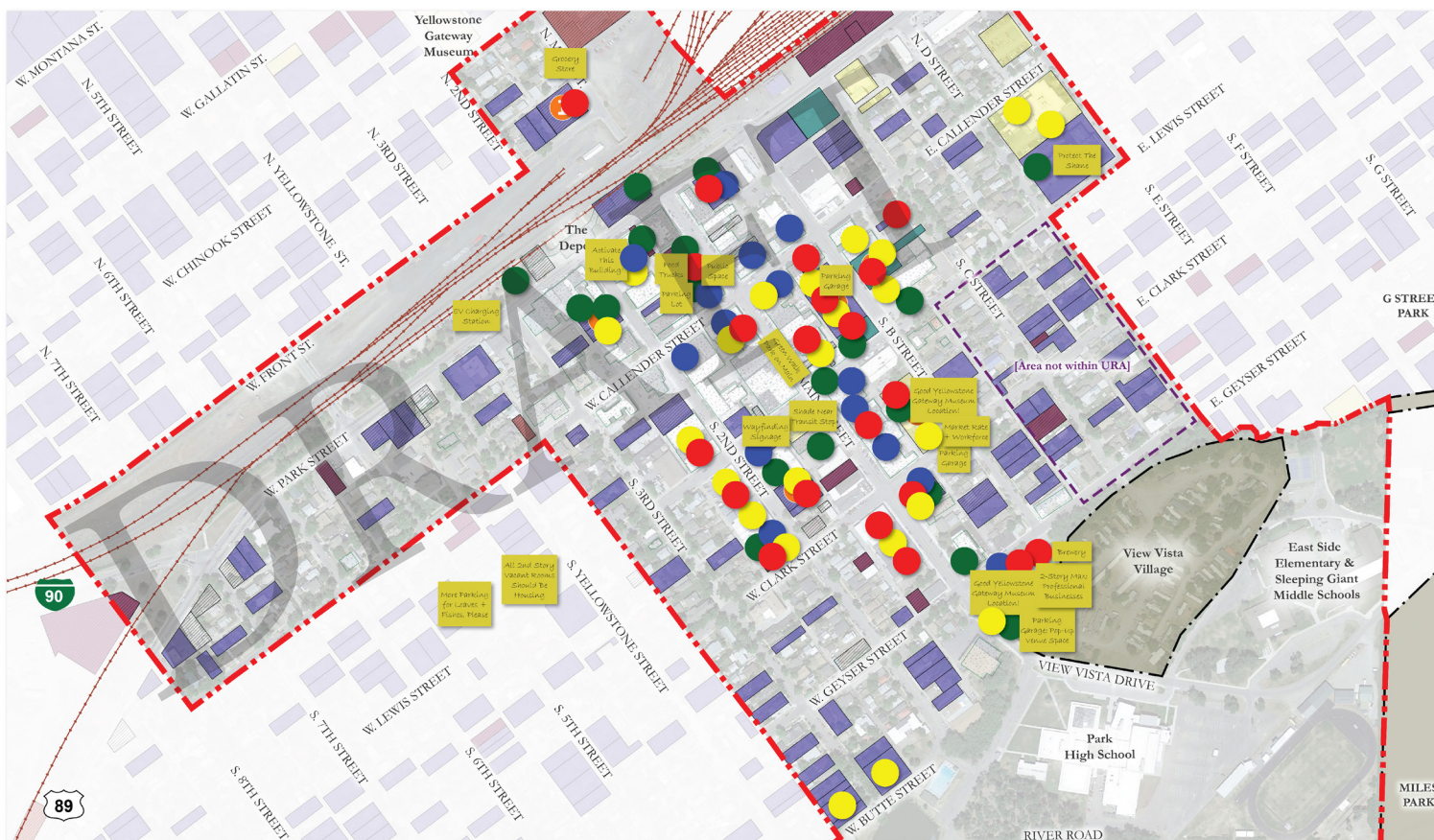
A consolidated set of the inputs received is shown on top of the map to the right. Consistent themes expressed across all of the participant groups included:

- Pocket Park / Plaza interest to activate the parking lots along Main Street
- Expansion of some shops restaurants south toward the river
- Interest in Residential Infill

KEY TO SUMMARIZED RESULTS SHOWN ON MAP

- Pocket Park / Plaza Space
- Residential
- Shops / Restaurants
- Hotel

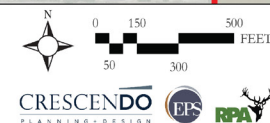
** Notes/additional markings added to map are shown as post-it notes **



Downtown Master Plan - Underutilized Parcels / Opportunity Sites Exercise

Livingston
DOWNTOWN MASTER PLAN

LEGEND	
	City of Livingston Boundary
	Plan Area Boundary (Also Urban Renewal Authority [URA] Boundary, except where noted)
	2+ Story Buildings
	City/School District Owned Parcels
	County Owned Parcels
	Vacant Parcels
	Low Floor Area Ratio Parcels (< 0.25)
	Parcels with Land Value 2Xs (or more) Building Value



Summarized Inputs from Community Workshop & Open House Exercises

COMMUNITY ENGAGEMENT CATALOG

COMMUNITY WORKSHOP & OPEN HOUSE EXERCISES - SUMMARIZED INPUTS

NOVEMBER 14TH - 16TH, 2023



Appendix

CIRCULATION & MOBILITY EXERCISE

At the Community Workshop / Charrette, and at the Community Open House, participants were asked to collaborate with other groups of attendees to express their map-based ideas within the Downtown Master Plan Study Area.

For this exercise, participants focused on the circulation and mobility opportunities they would like to see in the future within the Downtown, and placed color-coded dots on areas to indicate those preferences. In addition, participants were encouraged to add notes to the map with markers and post-it notes to further elaborate on their specific preferences.

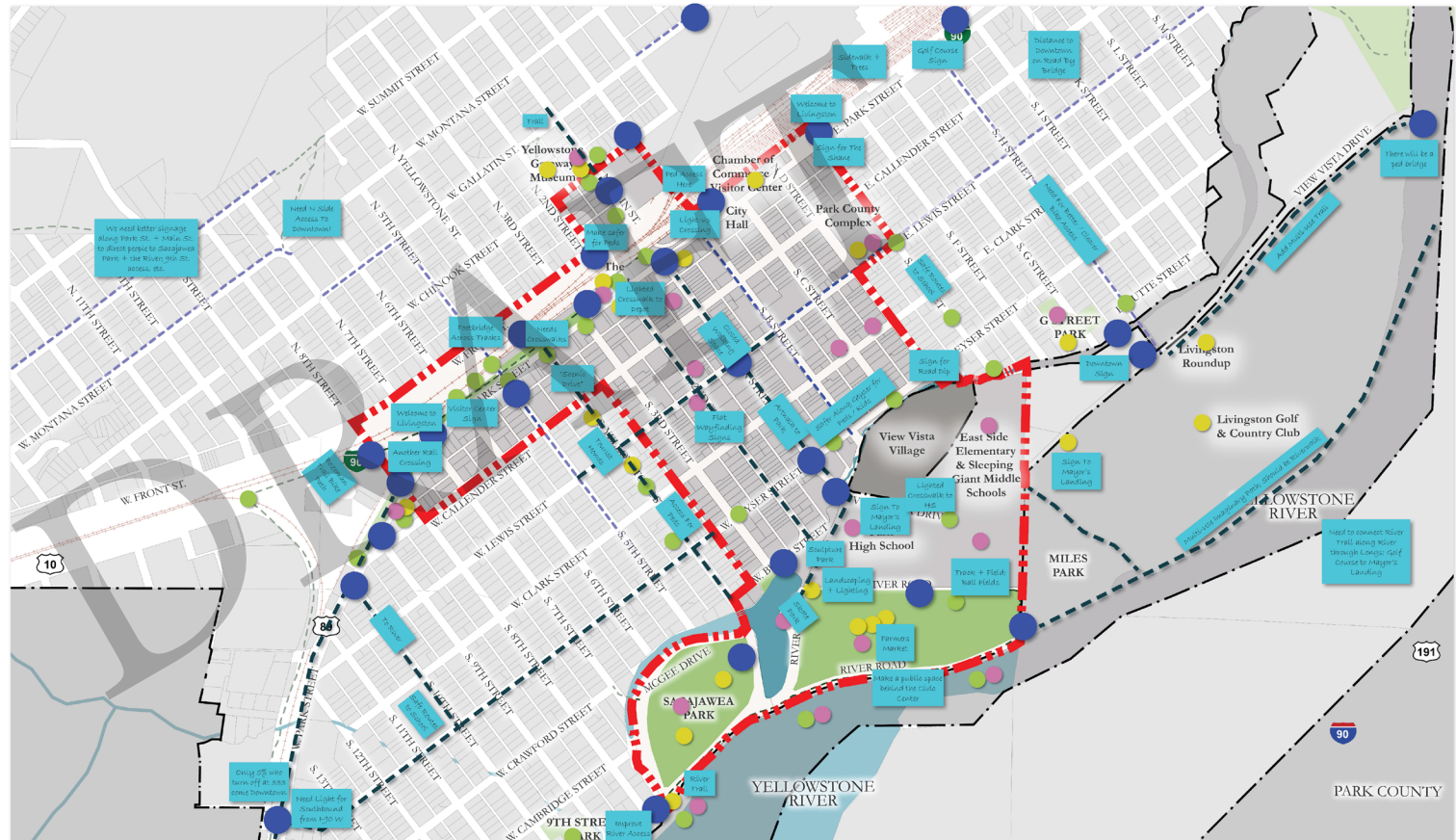
A consolidated set of the inputs received is shown on top of the map to the right. Consistent themes expressed across all of the participant groups included:

- Gateway desires along Park St., from I-90, at Geysers & Park St. and to/from Sacajawea Park
- Stronger Connections to Sacajawea Park
- Stronger Access to the North side of town

KEY TO SUMMARIZED RESULTS SHOWN ON MAP

- Gateway Opportunity
- Local Destination
- Tourist Destination
- Need for better access
- Desire for better/safer connection

** Notes/additional markups added to map are shown as post-it notes **



Downtown Master Plan - Circulation & Mobility Exercise

	LEGEND	City of Livingston Boundary	Park	Rail Lines	Previously Planned Bike Routes
	Plan Area Boundary (Also Urban Renewal Authority [URA] Boundary, except where noted)	Body of Water		Multi-Use Trails	

Scale: 0 300 1000 FEET
100 500

CRESCENDO PLANNING+DESIGN | EPS | RPA

Summarized Inputs from Community Workshop & Open House Exercises

COMMUNITY ENGAGEMENT CATALOG

COMMUNITY WORKSHOP & OPEN HOUSE EXERCISES - SUMMARIZED INPUTS

NOVEMBER 14TH - 16TH, 2023

Livingston
DOWNTOWN MASTER PLAN

PARKING MANAGEMENT EXERCISE

At the Community Workshop / Charrette, and at the Community Open House, participants were asked to collaborate with other groups of attendees to express their map-based ideas within the Downtown Master Plan Study Area.

For this exercise, participants focused on how they would like to see parking managed in the future within the Downtown, indicated places where they experience difficulty finding parking today. They placed color-coded dots on areas to indicate those preferences. In addition, participants were encouraged to add notes to the map with markers and post-it notes to further elaborate on their specific preferences.

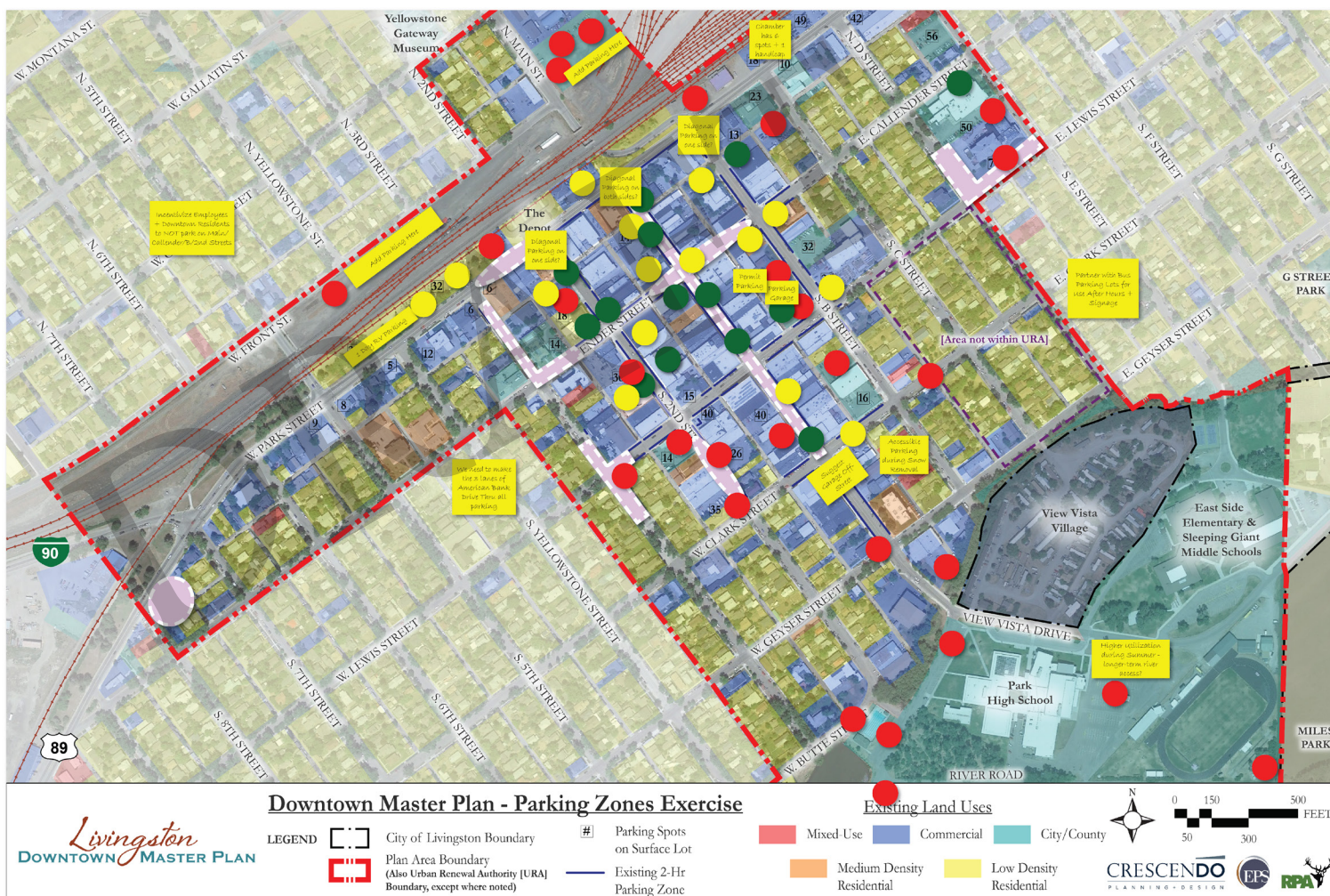
A consolidated set of the inputs received is shown on top of the map to the right. Consistent themes expressed across all of the participant groups included:

- Lack of available parking on Main St.; Desire for higher turnover spaces there
- Longer-term parking desire at The Depot & in Parking Lots

KEY TO SUMMARIZED RESULTS SHOWN ON MAP

- Potential high-turnover area (-30 minutes)
- Potential long-stay area (3+ hours)
- Additional 2-hour limits needed
- Areas you have trouble finding parking regularly

** Notes/additional markings added to map are shown as post-it notes **



Summarized Inputs from Community Workshop & Open House Exercises

COMMUNITY ENGAGEMENT CATALOG

COMMUNITY WORKSHOP & OPEN HOUSE EXERCISES - SUMMARIZED INPUTS

NOVEMBER 14TH - 16TH, 2023



Appendix

ARTS/AMENITIES/ EVENTS EXERCISE

At the Community Workshop / Charrette, and at the Community Open House, participants were asked to collaborate with other groups of attendees to express their map-based ideas within the Downtown Master Plan Study Area.

For this exercise, participants focused on the arts, amenities and events opportunities they would like to see in the future within the Downtown, and placed color-coded dots on areas to indicate those preferences. In addition, participants were encouraged to add notes to the map with markers and post-it notes to further elaborate on their specific preferences.

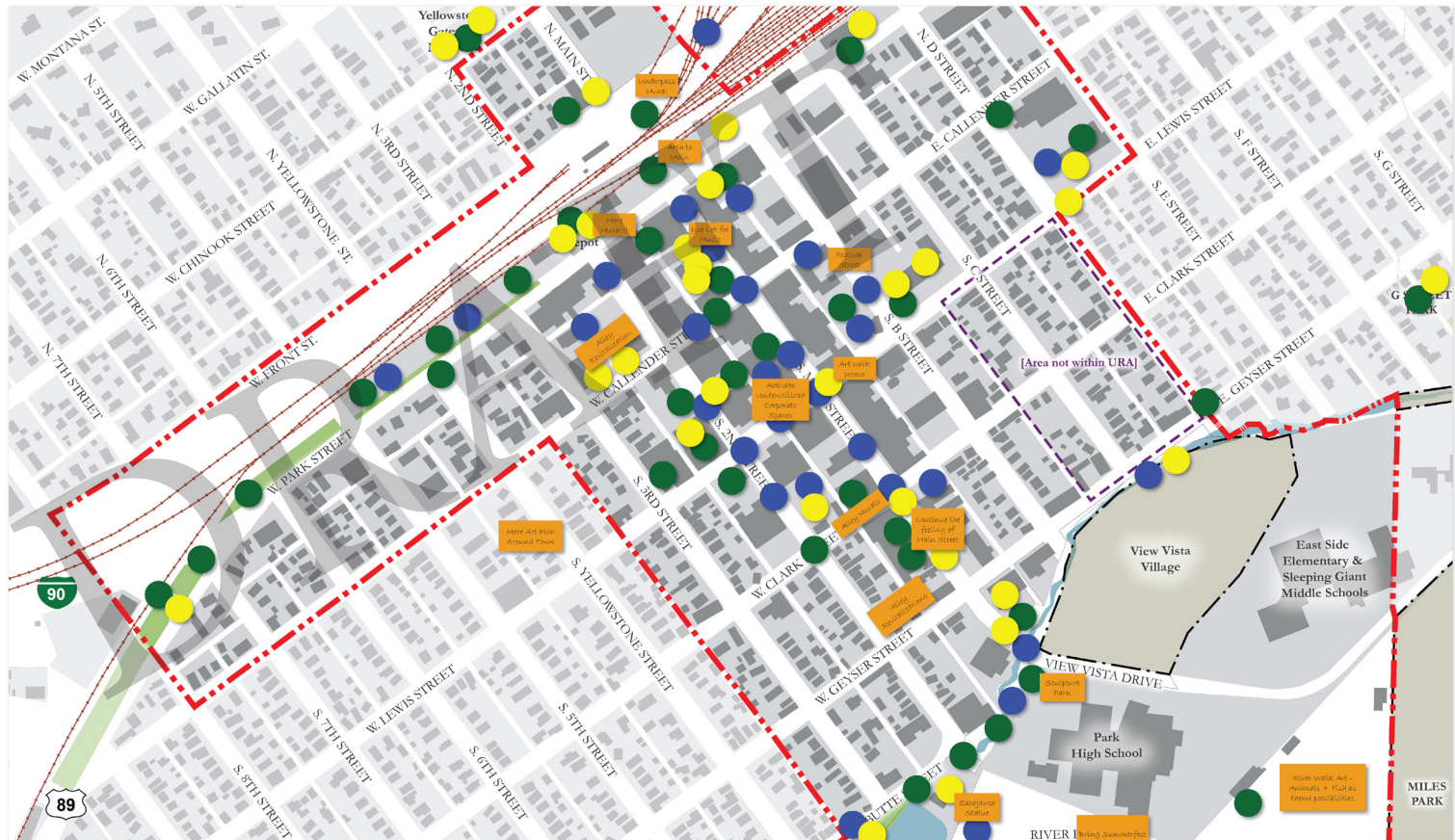
A consolidated set of the inputs received is shown on top of the map to the right. Consistent themes expressed across all of the participant groups included:

- Desire for Public Art as Gateway Opportunities along Park Street - 7th & Park; at Main & Park and Leading to the Yellowstone River
- Opportunities for temporary closures/events
- Promotion of The Depot & Gateway Museum

KEY TO SUMMARIZED RESULTS SHOWN ON MAP

- Public Art Opportunity
- Opportunity for temporary closures / gatherings
- Asset / Amenity in need of promotion / enhancement

** Notes/additional markups added to map are shown as post-it notes **



Downtown Master Plan - Arts/Amenities/Events Exercise

Public Art Opportunity	City of Livingston Boundary	Park	Building Footprints	Rail Lines
Opportunity for temporary closures / gatherings	Plan Area Boundary (Also Urban Renewal Authority [URA] Boundary, except where noted)	Body of Water	Blocks	

Livingston DOWNTOWN MASTER PLAN

CRESCENDO PLANNING+DESIGN | EPS | RPA

Scale: 0 150 300 500 FEET

Summarized Inputs from Community Workshop & Open House Exercises

COMMUNITY ENGAGEMENT CATALOG

EMERGING IDEAS

WHAT WE'RE HEARING SO FAR . . . WHAT RESONATES?

Livingston
DOWNTOWN MASTER PLAN

WHICH OF THESE IDEAS WE'VE HEARD FROM THE COMMUNITY (SO FAR), DO YOU THINK SHOULD BE PRIORITIZED/FURTHER EXPLORED? (PICK UP TO FOUR PER CATEGORY)

LAND USE & ACTIVATION IMPROVEMENTS # = NUMBER OF DOTS PLACED ON IDEA -XXXX XXX = WRITE-IN IDEAS

 24	 24	 31	 65
 50	 27	 72	 48

WHAT OTHER IDEAS DO YOU HAVE? (WRITE THEM IN HERE!)

- 5 MORE HOTELS DOWNTOWN
- A TARGET DOWNTOWN
- STORE AT NW ENERGY BUILDING
- HEIGHT RESTRICTIONS ON MULTI-STORY [MENTIONED TWICE]
- MORE NATURE DOWNTOWN - NATIVE PLANTS [MENTIONED 5 TIMES]
- POLLINATOR CORRIDORS & GREENWAYS [MENTIONED TWICE]
- TRADE SCHOOL / SMALL BUSINESS INCUBATION [MENTIONED TWICE]
- PUBLIC RECREATION CENTER
- MORE COMMUNITY GARDENS [MENTIONED TWICE]
- NATURE-BASED RESILIENCE SOLUTIONS [MENTIONED TWICE]

ARTS, CULTURE & AMENITIES IMPROVEMENTS # = NUMBER OF DOTS PLACED ON IDEA -XXXX XXX = WRITE-IN IDEAS

 26	 42	 45	 28
 58	 35	 33	 27

WHAT OTHER IDEAS DO YOU HAVE? (WRITE THEM IN HERE!)

- DON'T PREVENT ENERGY EFFICIENCY & CLEAN ENERGY

EMERGING IDEAS

WHAT WE'RE HEARING SO FAR . . . WHAT RESONATES?

Livingston
DOWNTOWN MASTER PLAN

WHICH OF THESE IDEAS WE'VE HEARD FROM THE COMMUNITY (SO FAR), DO YOU THINK SHOULD BE PRIORITIZED/FURTHER EXPLORED? (PICK UP TO FOUR PER CATEGORY)

STREETScape & MOBILITY IMPROVEMENTS # = NUMBER OF DOTS PLACED ON IDEA -XXXX XXX = WRITE-IN IDEAS

 45	 12	 22	 7
 78	 71	 37	 40

WHAT OTHER IDEAS DO YOU HAVE? (WRITE THEM IN HERE!)

- IMPROVED SIDEWALKS [MENTIONED TWICE]
- SENIOR & KIDS MUTUAL ZONES (I.E. GARDENS)

PARKS & OPEN SPACE IMPROVEMENTS # = NUMBER OF DOTS PLACED ON IDEA -XXXX XXX = WRITE-IN IDEAS

 49	 27	 38	 73
 26	 44	 38	 24

WHAT OTHER IDEAS DO YOU HAVE? (WRITE THEM IN HERE!)

- WIND SCREENS [MENTIONED TWICE]
- WIND SCULPTURES [MENTIONED TWICE]
- FIRST FLOOR STREET LEVEL RETAIL ONLY
- PARKING GARAGE [MENTIONED TWICE]

Appendix

COMMUNITY ENGAGEMENT CATALOG



Draft Plan Framework - Focus Group Feedback

COMMUNITY ENGAGEMENT CATALOG



COMMUNITY ENGAGEMENT CATALOG



Draft Plan Framework - Focus Group Feedback

COMMUNITY ENGAGEMENT CATALOG



Appendix

COMMUNITY ENGAGEMENT CATALOG



Draft Plan Framework - Focus Group Feedback

Final Report

Livingston Downtown Housing Study

The Economics of Land Use



DRAFT

Prepared for:
City of Livingston, Montana

Prepared by:
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August 2, 2024

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1. Introduction and Summary of Findings

As part of the process to create a new Downtown Master Plan for the City of Livingston led by Crescendo Planning + Design, Economic & Planning Systems, Inc. (EPS) was tasked with providing the City of Livingston with a greater understanding of housing conditions and opportunities in the Downtown Livingston Study Area.

This report documents existing conditions in Downtown Livingston including the area's housing supply, estimates demand for future housing, and assesses the feasibility of housing prototypes in the Study Area and associated financial gaps.

Key Findings

Housing Study

1. The cost and composition of the housing stock in Livingston has started to shift, which has impacts on both renters and prospective homeowners.

Nearly half of renter households in Livingston are cost burdened, meaning they spend more than 30 percent of their income on rent. Of these households, roughly 18 percent are severely cost burdened, meaning they spend more than 50 percent of income on rent. Additionally, many households in Livingston are unable to purchase a home at the current median sales price, based on their annual income. To afford a single-family home in Livingston at the estimated 2023 median listing price of \$682,000, a household would need to earn over \$160,000 annually (229% of the 2023 Park County AMI for a 2-person household).

2. Over 80 percent of the job growth in Park County in the past five years (from 2018-2023) is attributed to industries with average wages that translate to household incomes below 120% of AMI.

Wages paid for many of the jobs being created in the county predominately equates to a household income of \$90,000 to \$120,000 per year depending on household size. Livingston HealthCare is the city's largest employer, which contributes to Health Care being the largest employment industry, followed by Retail Trade, Accommodation/Food Services, Public Administration, and Education. The growth of these industries will continue to generate demand for housing options affordable to those earning at or below the area median income.

3. The City of Livingston overall needs to continue to attract diverse housing products to keep pace with employment-driven demand.

Livingston is estimated to need 85 new housing units per year over the next 10 years to keep pace with workforce demands. A large share of this demand will be for attached and multifamily housing.

During the past decade, the small inventory of rental apartments units in the city has not kept pace with demand and the number of rental units in the Downtown area has even declined. However, new multifamily for-sale housing has been constructed in recent years, and new condo units in Livingston (outside of the Study Area) have sold for less than \$400,000, which can serve as an attainable for-sale housing option.

Feasibility Analysis

4. The City can benefit from increased housing options in Downtown that are affordable to the existing workforce; however, there are development feasibility challenges for all three of the potential housing products identified for Downtown.

The goal of attracting any significant new housing Downtown, especially housing that is affordable to the City's workforce, will likely require regulatory and/or financial support. Housing options 2 and 3 are the types of projects that would provide attainable options for the workforce, but there are feasibility gaps that need to be addressed through use of regulatory and financial tools. Proactive efforts by the City, URA, and other partners can lead to the development of these types of projects.

5. It is unlikely that medium-to-large scale, vertical, mixed-use housing projects (greater than 20 units) will be feasible for development Downtown in the near future due to financing gaps.

The construction of condos and/or luxury rental units would need to be accommodated through smaller projects that would likely involve the adaptive reuse of existing buildings Downtown.

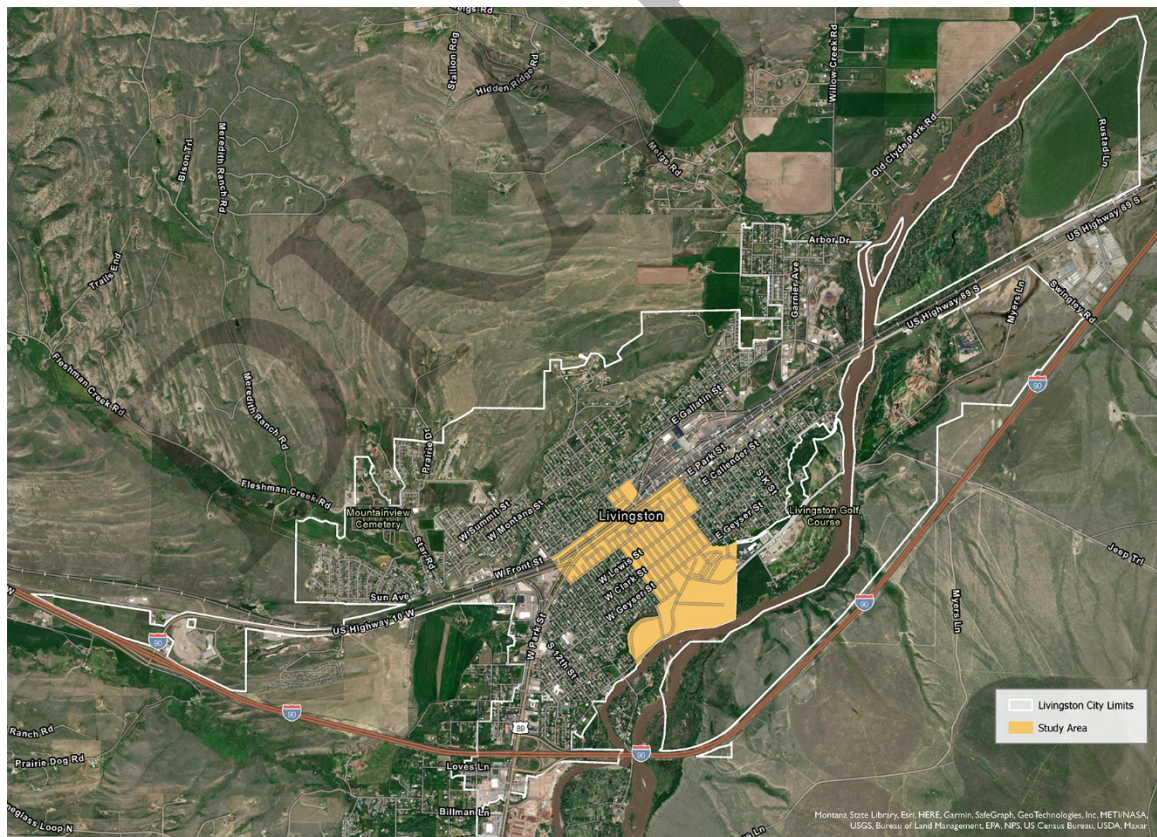
2. Economic and Demographic Profile

This chapter summarizes economic and demographic trends in the Downtown Livingston Study Area, the City of Livingston, and Park County. This section includes trends on population, households, age, and income, followed by an analysis of employment trends in Livingston and Park County.

Study Area

The Downtown Study Area is shown below in **Figure 1**. The Study Area contains Downtown Livingston and the Urban Renewal Authority (URA) boundary. Trends within this Study Area are compared to trends within the city and county at large.

Figure 1. Study Area



Demographics

The Study Area has grown at a slightly faster rate than Livingston and Park County overall since 2010. The Downtown Study Area grew in population by 285 residents from 2010 to 2023, shown in **Table 1**. This equates to 13.8 percent of the total population growth in Park County during this period. Between 2010 and 2023, the Study Area grew by 126 households, a 19 percent increase from 650 households in 2010.

Table 1. Population and Household Trends, 2010-2023

Description	2010	2023	2010-2023			
			Total	%Change	Ann. %	%Capture
Population						
Study Area	1,077	1,362	285	26%	1.8%	13.8%
Livingston	7,600	8,900	1,300	17%	1.2%	62.9%
Park County	15,636	17,704	2,068	13%	1.0%	100.0%
Households						
Study Area	650	776	126	19%	1.4%	13.0%
Livingston	3,571	4,197	626	18%	1.3%	64.4%
Park County	7,310	8,282	972	13%	1.0%	100.0%

Source: ESRI Business Analyst; Economic & Planning Systems

The Study Area’s residents have a median age of 48.3 which is slightly higher than Livingston (with a median age of 45.7), but similar to Park County’s median age (48.8).

The median household income in the Study Area of \$44,892 is notably lower than the city and county, however this is somewhat due to the smaller household sizes. The Study Area’s average household size (1.70) is smaller than the city and county (2.08 and 2.12 respectively), as shown in **Table 2**.

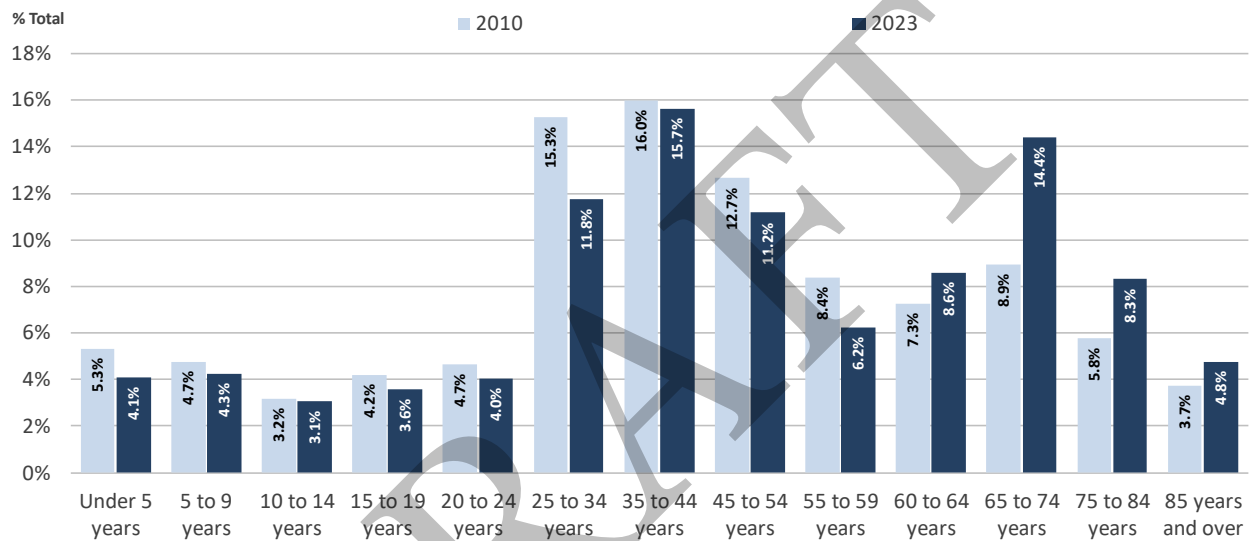
Table 2. Demographic Comparison, 2023

	2023		
	Study Area	Livingston	Park County
Population	1,362	8,900	17,704
Median Age	48.3	45.7	48.8
Median Household Income	\$44,892	\$55,398	\$62,610
Average Household Size	1.70	2.08	2.12

Source: ESRI Business Analyst; Economic & Planning Systems

The Downtown Study Area has seen its population trend older since 2010. The Study Area’s median age has increased by 5.6 years since 2010, from 42.7 to 48.3. When looking at the Study Area’s share of population by age, every cohort under the age of 59 has decreased in share of population between 2010 and 2023. Conversely, the share of residents over the age of 60 has increased by a total of 10.4 percentage points, seen in **Figure 2**. This may indicate that Downtown Livingston is attracting more retirees.

Figure 2. Study Area Population by Age, 2010 and 2023

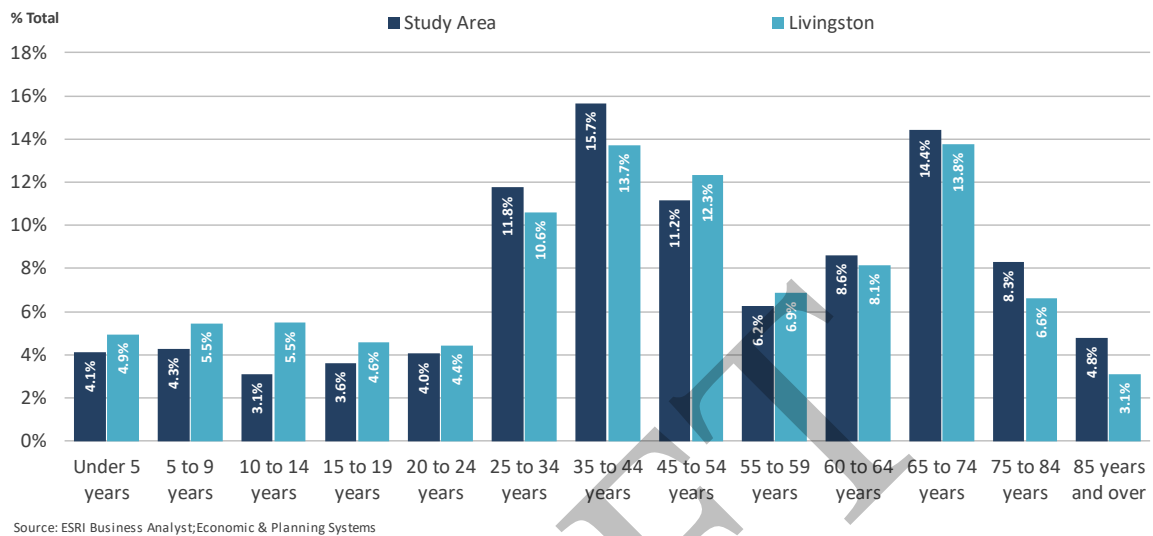


Source: ESRI Business Analyst; Economic & Planning Systems

The trend towards older residents in the Downtown Study Area aligns with citywide trends. The median age in Livingston increased by 3.8 years since 2010, from 41.9 to 45.7, reflecting the city’s aging population.

As shown in **Figure 3**, a smaller proportion of residents under the age of 19 live within the Study Area compared to Livingston at large, approximately 16 percent compared to 20 percent. With that said, there is a larger share of residents in the 25 to 44 age range within the Study Area, indicating that Downtown Livingston is drawing a higher share of working-aged adults than the city at large.

Figure 3. Study Area and Livingston Population by Age, 2023



The Study Area has a much higher share of 1-person households than the city and county at large, as shown in **Table 3**.

Table 3. Household Type, 2010-2023

Description	Study Area		Livingston		Park County	
	2010	2023	2010	2023	2010	2023
Households^[1]						
With Children	17.5%	17.1%	24.8%	21.3%	23.5%	18.8%
1-Person	54.3%	51.1%	38.9%	38.9%	35.7%	34.4%

Source: ESRI; U.S. Census; Economic & Planning Systems

[1] Households with children reflects 2022 figures and 1-person households reflects 2020 figures for 2023.

As shown in **Table 4**, from 2010 to 2023, the share of owner-occupied housing units increased in the Study Area, Livingston, and Park County overall. The Study Area gained approximately 134 owner-occupied housing units while renter-occupied units remained stagnant during this period.

Table 4. Tenure, 2010-2023

Description	Study Area				Livingston				Park County			
	2010		2023		2010		2023		2010		2023	
	Total	% Total	Total	% Total	Total	% Total	Total	% Total	Total	% Total	Total	% Total
Housing Units												
Owner-Occupied	279	42.9%	413	53.2%	2,265	63.4%	2,744	65.4%	4,938	67.6%	5,656	68.3%
Renter-Occupied	371	57.1%	363	46.8%	1,306	36.6%	1,453	34.6%	2,372	32.4%	2,626	31.7%
Total Occupied	650		776		3,571		4,197		7,310		8,282	

Source: ESRI; Economic & Planning Systems

Employment

Livingston Employment

Livingston's total employment across all industries in 2022 was 4,123. This figure has grown by 422 since 2010, which translates to approximately 35 new jobs annually as shown in **Table 5**.

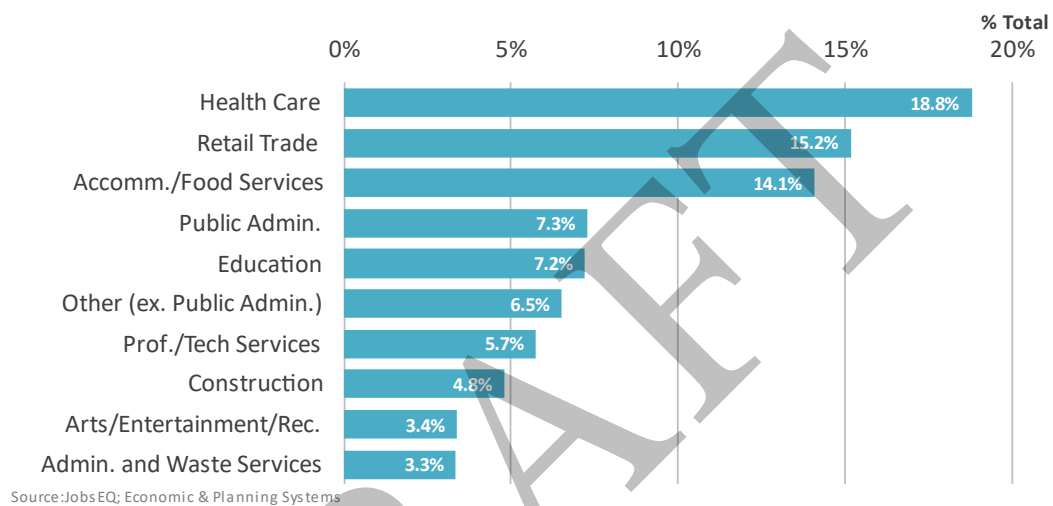
Table 5. Employment by Industry – Livingston, 2010-2022

Description	2010	2022	2010-2022		
			Total	Ann. #	Ann. %
Livingston					
Ag./Forestry/Fishing	73	88	16	1	1.6%
Mining	2	1	-1	0	-3.2%
Utilities	14	7	-7	-1	-5.5%
Construction	154	198	44	4	2.1%
Manufacturing	244	62	-183	-15	-10.9%
Wholesale Trade	28	47	19	2	4.4%
Retail Trade	449	626	177	15	2.8%
Transport./Warehousing	75	47	-28	-2	-3.9%
Information	85	61	-24	-2	-2.7%
Finance	159	137	-22	-2	-1.2%
Real Estate	45	77	31	3	4.5%
Prof./Tech Services	189	237	47	4	1.9%
Management	37	35	-2	0	-0.5%
Admin. and Waste Services	34	138	103	9	12.3%
Education	205	297	92	8	3.1%
Health Care	659	775	116	10	1.4%
Arts/Entertainment/Rec.	83	139	56	5	4.4%
Accomm./Food Services	548	581	32	3	0.5%
Other (ex. Public Admin.)	304	268	-36	-3	-1.0%
Public Admin.	312	300	-12	-1	-0.3%
Unclassified	0	2	2	0	---
Total Jobs - All Industries	3,701	4,123	422	35	0.9%

Source: JobsEQ; Economic & Planning Systems

Livingston’s largest industries as of 2022 are Health Care with 775 jobs, followed by Retail Trade with 626 jobs, Accommodation/Food Services with 581 jobs, Public Administration with 300 jobs, and Education with 297 jobs. Together, these top five industries make up over 60 percent of Livingston’s total employment base (**Figure 4**). The presence of Livingston HealthCare is the main reason that Health Care is the top industry citywide.

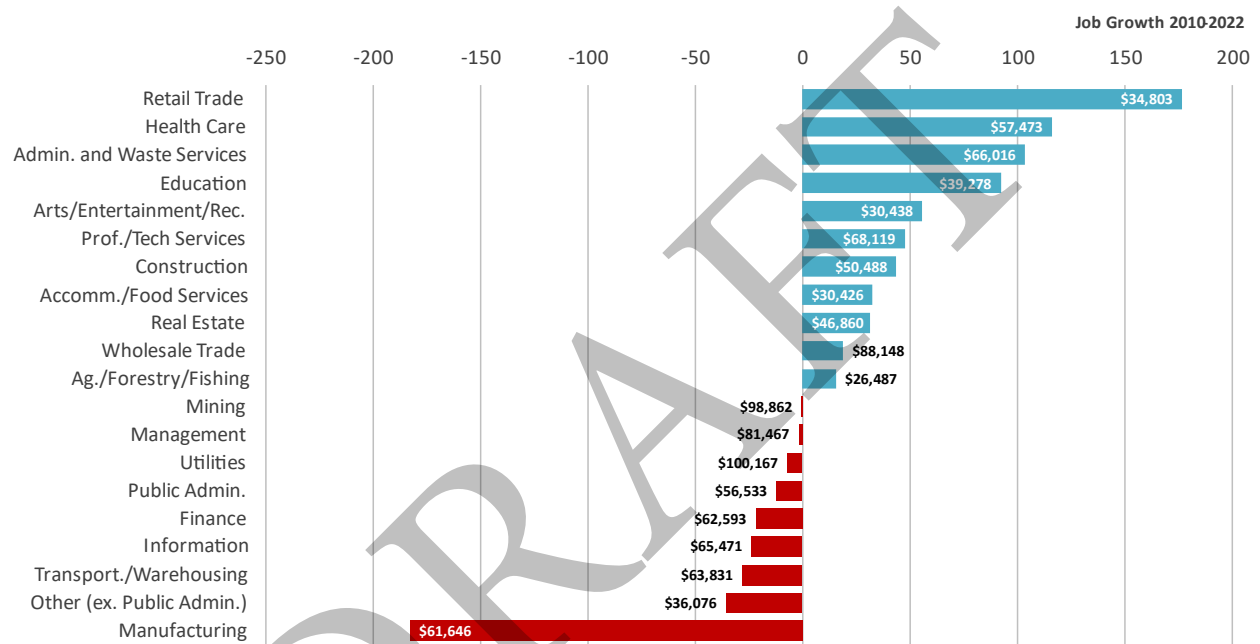
Figure 4. Largest Industries by Employment – Livingston, 2022



Between 2010 and 2022, Retail Trade was the fastest growing industry in Livingston, increasing by 177 jobs with an annual average income per worker of \$34,803. This annual wage translates to less than 60% of Park County’s 2023 AMI for a 1-person household. Since HUD defines renters below 80% of AMI as low income, a single-person household earning this wage would fall under this threshold.

Overall, recent employment growth in Livingston has been primarily in lower wage industries. Other growing industries beyond Retail Trade include Administrative and Waste Services, which increased by 123 jobs, Health Care (adding 116 jobs), Education (adding 103 jobs), and Education (adding 92 jobs). Employment in some of the highest paying industries, such as Mining, Management, and Utilities has remained stagnant since 2010. The Manufacturing industry saw the largest decrease in employment, as shown in **Figure 5**.

Figure 5. Job Growth by Industry and Wages – Livingston, 2010-2022



Source: JobsEQ; Economic & Planning Systems

Park County Employment

Park County has seen a higher rate of employment growth than Livingston since 2010. As of 2022, Park County has approximately 8,000 jobs across all industries. This is 1,663 more jobs than in 2010 (equating to approximately 139 new jobs annually), as seen in **Table 6**.

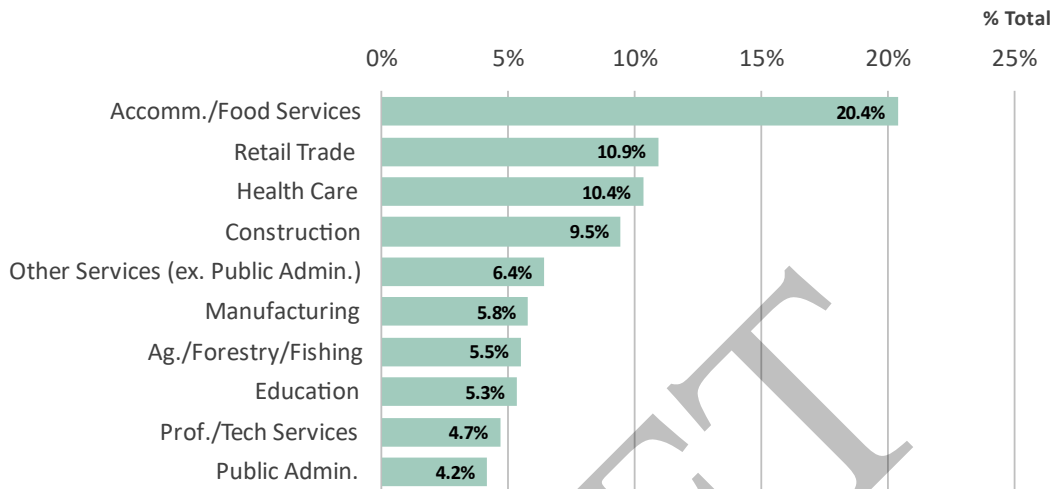
Table 6. Employment by Industry – Park County, 2010-2022

Description	2010	2022	2010-2022		
			Total	Ann. #	Ann. %
Park County					
Ag./Forestry/Fishing	419	440	20	2	0.4%
Mining	20	14	-6	0	-2.9%
Utilities	43	44	1	0	0.2%
Construction	518	756	239	20	3.2%
Manufacturing	296	463	168	14	3.8%
Wholesale Trade	37	76	39	3	6.1%
Retail Trade	708	875	167	14	1.8%
Transport./Warehousing	147	143	-4	0	-0.2%
Information	101	74	-27	-2	-2.6%
Finance	178	160	-18	-1	-0.9%
Real Estate	84	150	66	6	5.0%
Prof./Tech Services	253	374	121	10	3.3%
Management	37	41	4	0	0.9%
Admin. and Waste Services	117	330	213	18	9.0%
Education	486	427	-59	-5	-1.1%
Health Care	676	828	152	13	1.7%
Arts/Entertainment/Rec.	189	317	129	11	4.4%
Accomm./Food Services	1,223	1,631	408	34	2.4%
Other Services (ex. Public Adm)	470	513	43	4	0.7%
Public Admin.	330	333	2	0	0.1%
Unclassified	<u>0</u>	<u>6</u>	<u>6</u>	<u>0</u>	---
Total Jobs - All Industries	6,331	7,994	1,663	139	2.0%

Source: JobsEQ; Economic & Planning Systems

Park County's largest industries by employment are Accommodation/Food Services with 1,631 jobs, Retail Trade with 875 jobs, Health Care with 828 jobs, and Construction with 756 jobs as of 2022. These top four industries make up approximately half of the total employment in Park County (**Figure 6**).

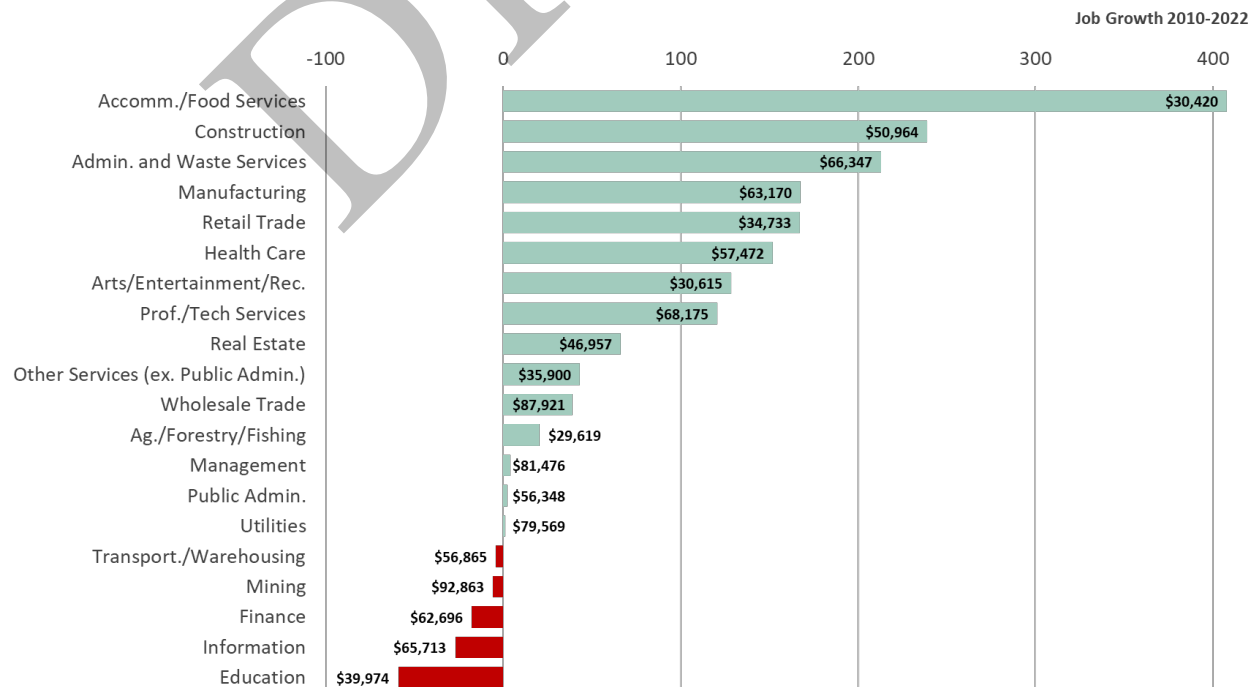
Figure 6. Largest Industries by Employment – Park County, 2022



Source: JobsEQ; Economic & Planning Systems

Between 2010 and 2022, the Accommodation/Food Services industry saw the highest amount of employment growth in Park County, adding just over 400 jobs (**Figure 7**). In 2022, the annual average wage of this industry was \$30,420, which is lower than almost every other industry (primarily due to the prevalence of tips in this industry, which is not accounted for in this data). Growth in the Accommodation/Food Services industry made up nearly a quarter of the total employment growth in Park County since 2010.

Figure 7. Job Growth by Industry and Wages – Park County, 2010-2022

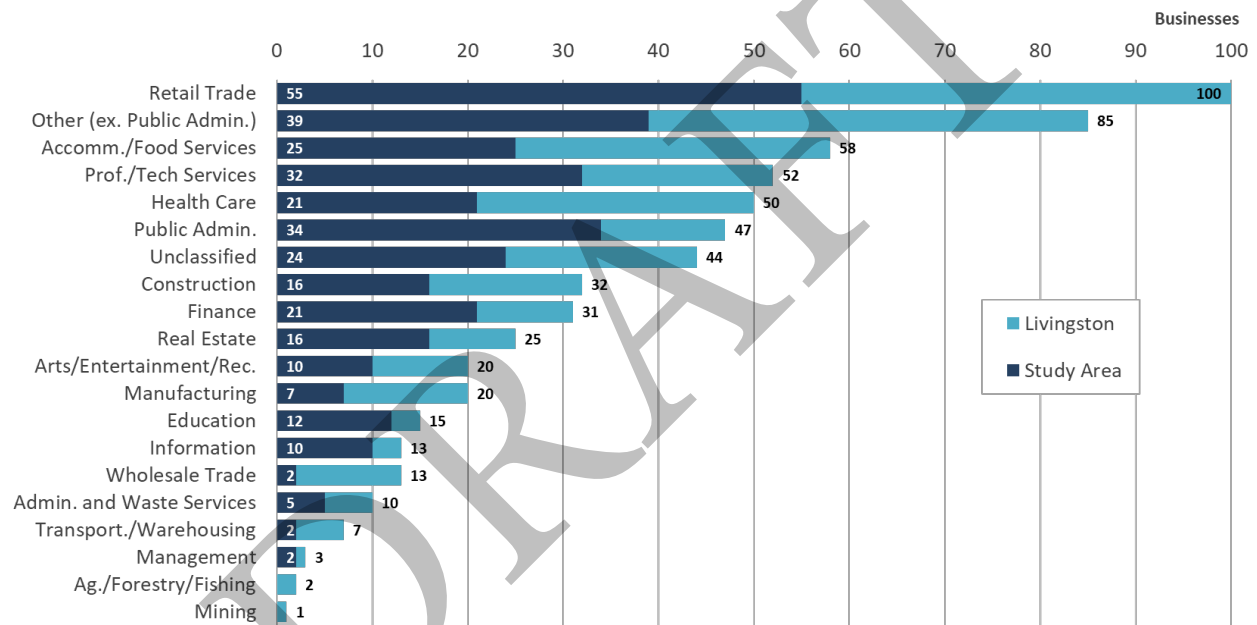


Source: JobsEQ; Economic & Planning Systems

Other industries that have seen employment growth include Construction (adding 239 jobs), Administrative and Waste Services (adding 213 jobs), Retail Trade (adding 167 jobs), and Manufacturing (adding 168 jobs). Since 2010, the County lost 59 jobs in Education and 27 jobs in Information (**Table 6**).

As shown in **Figure 8**, roughly half of Livingston’s Retail Trade and Accommodation/Food Services businesses are located Downtown within the Study Area. Many of Livingston’s businesses belonging to Professional Services industries are located Downtown. This includes 80 percent of Education, 77 percent of Information, and 72 percent of Public Administration businesses.

Figure 8. Businesses by Industry – Study Area and Livingston, 2023



Source: ESRI Business Analyst; Economic & Planning Systems

3. Real Estate Market Conditions

This chapter provides a summary of housing and commercial real estate trends in the Study Area, Livingston, and Park County. This chapter summarizes overall housing conditions, multifamily trends, and market factors related to the commercial market with a focus on retail and hospitality.

Housing Trends

Approximately 845 out of 4,545 housing units in Livingston are in the Downtown Study Area, which equates to 19 percent, as shown in **Table 7**.

In 2023, around 8.2 percent of housing units in the Study Area and 7.7 percent in Livingston were vacant. In comparison, Park County's residential vacancy rate was roughly two times higher than both the Study Area and city at 16 percent. These vacant units include homes used for seasonal, recreational, or occasional use.

Table 7. Housing Inventory, 2010-2023

Description	2010		2023		2010-2023		
	Total	% Total	Total	% Total	Total	Ann. #	% Change
Study Area							
Occupied Housing Units	650		776				
Owner Occupied	279	42.9%	413	53.2%	134	10	48.0%
Renter Occupied	371	57.1%	363	46.8%	-8	-1	-2.2%
Vacant Housing Units	114	14.9%	69	8.2%	-45	-3	-39.5%
Total Housing Units	764		845		81	6	10.6%
Livingston							
Occupied Housing Units	3,571		4,197				
Owner Occupied	2,265	63.4%	2,744	65.4%	479	37	21.1%
Renter Occupied	1,306	36.6%	1,453	34.6%	147	11	11.3%
Vacant Housing Units	461	11.4%	348	7.7%	-113	-9	-24.5%
Total	4,032		4,545		513	39	12.7%
Park County							
Occupied Housing Units	7,310		8,282				
Owner Occupied	4,938	67.6%	5,656	68.3%	718	55	14.5%
Renter Occupied	2,372	32.4%	2,626	31.7%	254	20	10.7%
Vacant Housing Units	2,065	22.0%	1,572	16.0%	-493	-38	-23.9%
Total	9,375		9,854		479	37	5.1%

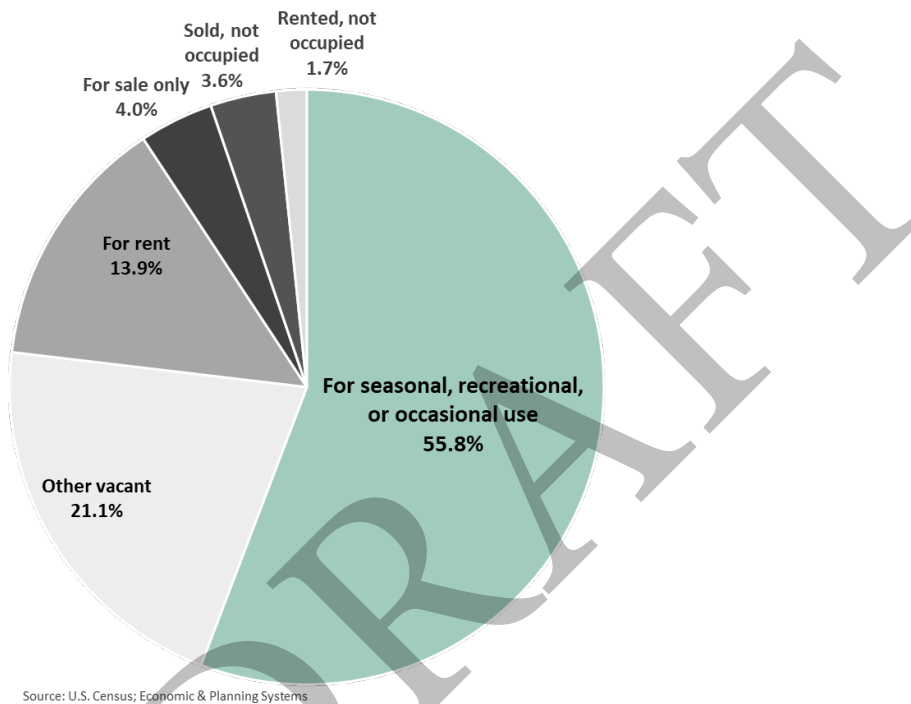
Source: ESRI Business Analyst; Economic & Planning Systems

Note: % Total reflects the percentage of occupied housing units that are owner and renter occupied, and the percentage of total housing units that are vacant.

Second Homes

The U.S. Census categorizes housing units used for seasonal, recreational or occasional use as vacant. As shown in **Figure 9**, approximately 56 percent of vacant housing units are used seasonally. As a result, nearly one out of 10 housing units in the county are second homes or used for seasonal use.

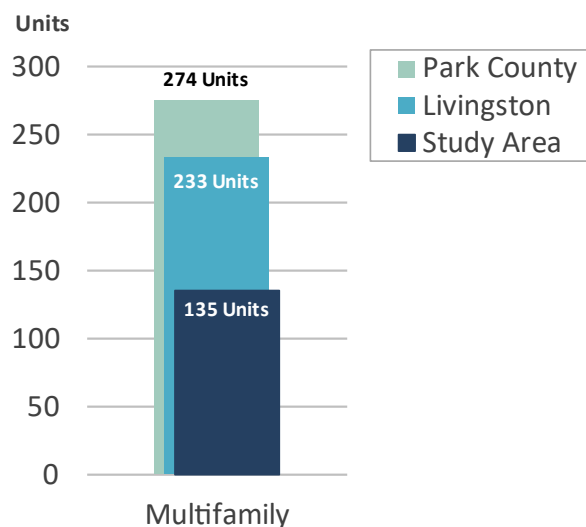
Figure 9. Vacant Housing Units by Type – Park County, 2022



Multifamily Trends

As of 2023, there are approximately nine apartment buildings containing 135 multifamily rental units within the Study Area. This equates to roughly half of the total apartment units within Park County (274) as seen in **Figure 10**.

Figure 10. Multifamily Inventory, 2023



As shown in **Figure 11**, multifamily vacancy rates in Livingston dropped by approximately 5 percent from 2015 to 2023, and rents increased by 11 percent.

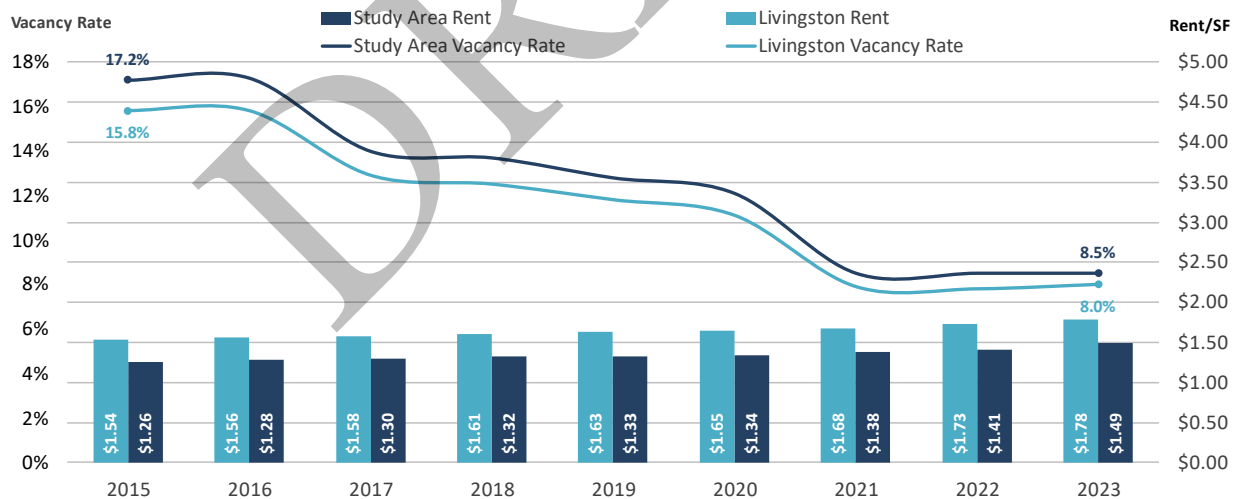
Figure 11. Apartment Market Trends, 2015-2023

Description	2015	2023	2015-2023	
			Total	% Change
Livingston				
Inventory Units	215	238	23	10.7%
Rent per Unit	\$1,173	\$1,302	\$129	11.0%
Rent per Sq. Ft.	\$1.54	\$1.78	\$0.24	15.6%
Vacancy Rate	15.8%	8.0%	-7.8%	

Source: CoStar; Economic & Planning Systems

Multifamily buildings in both the Study Area and Livingston have seen decreasing vacancy rates and increasing rental rates in recent years (**Figure 12**). It is worth noting that these figures are based on a low number of multifamily properties, as there are only nine properties in the Study Area. Rental and vacancy rates in Park County have historically aligned with Livingston numbers, which may be due to data limitations caused by the region's low multifamily supply.

Figure 12. Multifamily Rent and Vacancy – Study Area & Livingston, 2015-2023

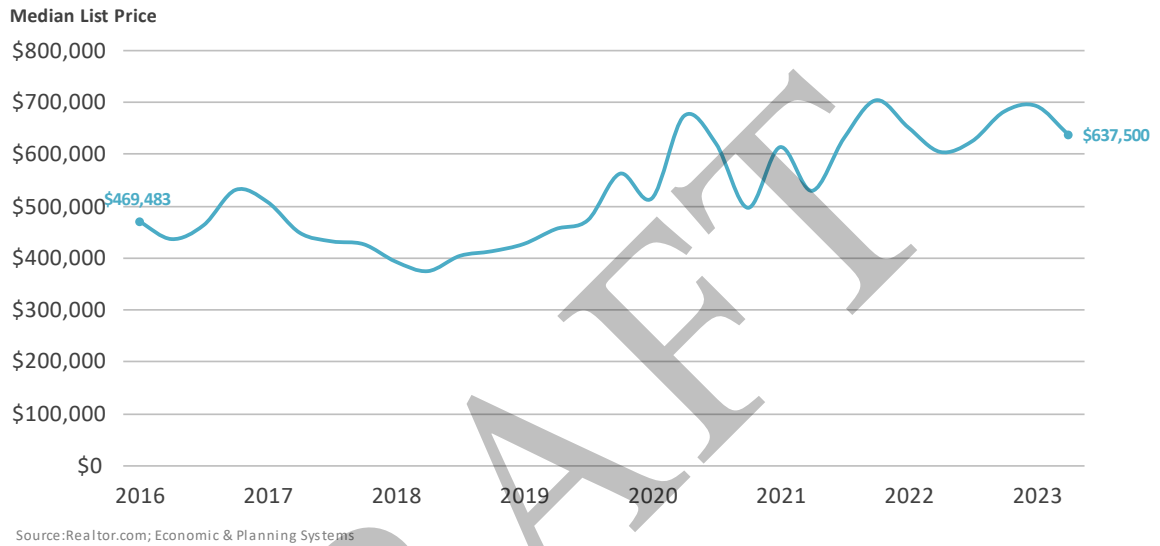


Source: CoStar; Economic & Planning Systems

For-Sale Housing

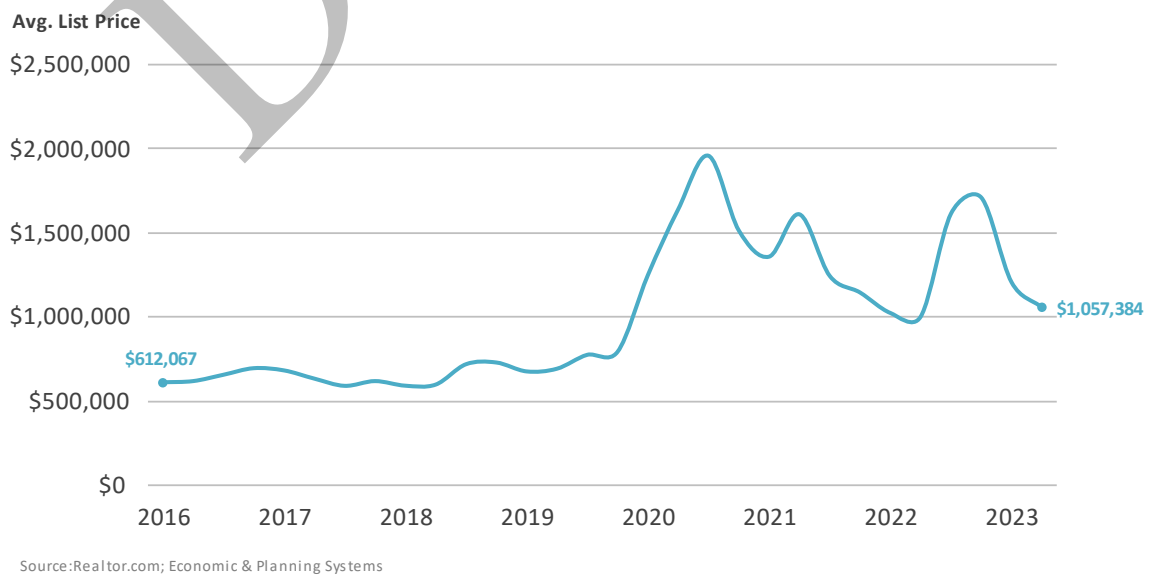
In the fourth quarter of 2023, the median list price for residential for-sale housing in Livingston was approximately \$637,000, as shown in **Figure 13**. This is a 46.3 percent increase since the fourth quarter of 2016.

Figure 13. Median List Price – Livingston Zip Code (59047)



As of 2023, the average list price for all for sale housing product in Livingston was around \$1 million, an increase of approximately \$400,000 since 2016 (**Figure 14**).

Figure 14. Average List Price – Livingston Zip Code (59047)



New Multifamily Projects

New multifamily housing, shown below, has recently been constructed in Livingston outside of the Downtown Study Area.



Yellowstone Granary
924 E Park St

This adaptive reuse project repurposes an historic grain elevator into 18 apartment units. Built in 2023, Yellowstone Granary features studio to 2-bedroom units located in unique areas of the granary: the grain elevator, mill, and ranch store. As of 2024, 2-bedroom units rent for approximately \$2,000 per month and the 1-bedroom units rent for around \$1,605.



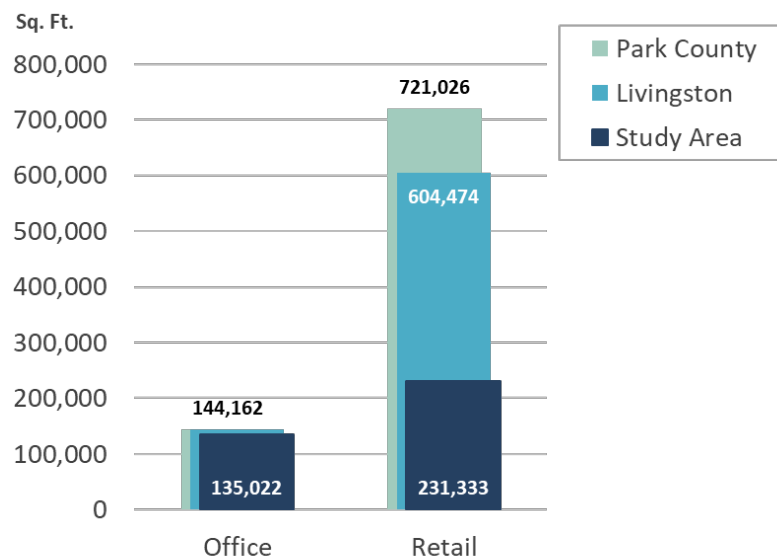
The Flats at Yellowstone Bend
2222 Willow Drive

The Flats at Yellowstone Bend includes a total of 140 2- and 3-bedroom condominium units. Completed in 2023, new units sold for around \$350,000. This multifamily project is located across the street from Yellowstone River Inn & Suites and is situated at the intersection of U.S. Highway 191 and Highway 89.

Commercial Inventory

As seen in , nearly all office space in the City of Livingston and Park County is in the Downtown Study Area. Approximately 38 percent of Livingston’s retail square footage is within the Study Area and 84 percent of Park County’s retail inventory is within Livingston.

Figure 15. Commercial Inventory, 2023



Source: CoStar; Economic & Planning Systems

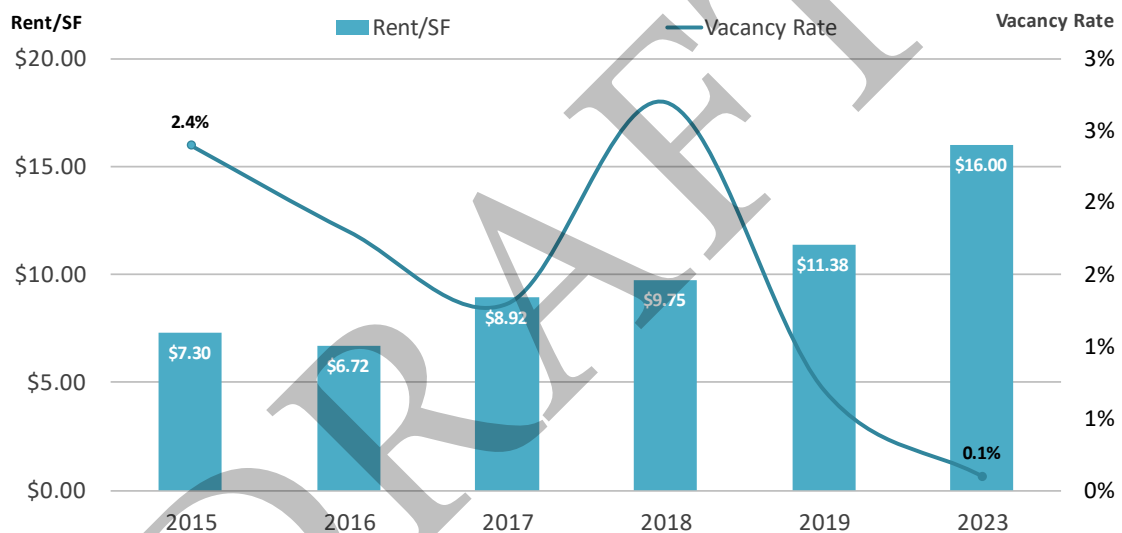
Commercial Rent and Vacancy Rates

Retail

As shown in **Figure 16**, in 2023 Livingston’s retail vacancy rate was very low at nearly 0 percent, which is consistent with low vacancy rates historically and may be due to data availability issues common in smaller cities and towns.

The city’s average retail rent in 2023 is \$16 per square foot, a significant increase from 2019’s average rental rate of \$11.38 per square foot (the previous year in which rental data for the city is available).

Figure 16. Retail Rent and Vacancy – Livingston, 2015-2024 YTD



Source: CoStar, Economi & Planning Systems
 Note: Rent and vacancy data unavailable from 2020-2022.

Office

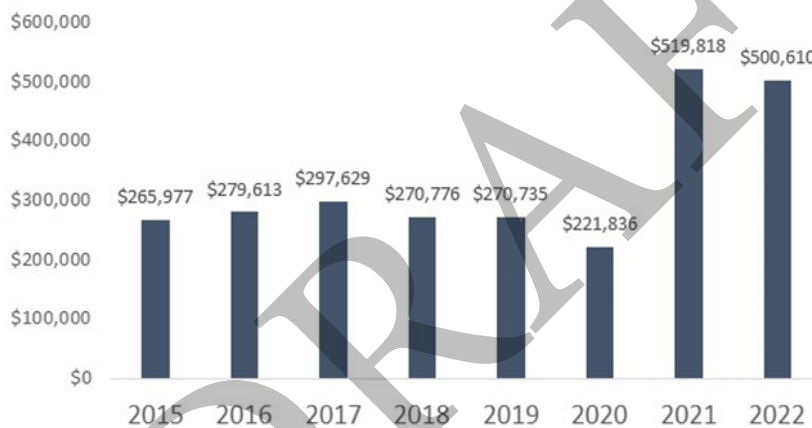
Livingston has a limited inventory of commercial office buildings. Most office properties in the city are in buildings smaller than 8,000 square feet and the city’s largest office space is a medical office building at 422 S Main Street totaling just under 25,000 square feet. Therefore, due to the lack of large commercial office space in the city, rent and vacancy rates are not readily available.

Hospitality

Visitation Trends

As many markets across the country saw their hospitality and tourism industries struggle to recover from the impacts of the COVID-19 pandemic, Livingston’s Convention and Visitors Bureau (CVB) saw tourism increase in 2021 and 2022 as tourism shifted towards more rural areas with nearby outdoor recreation opportunities. The addition of new hotel rooms in Livingston in 2021 helped to increase the tax generated by tourists. In 2021, the Livingston CVB collected 92 percent more lodging tax revenue than prior to the pandemic in 2019, as shown in **Figure 17**. This revenue dropped slightly in 2022, but at \$500,000 was still notably higher than pre-pandemic figures.

Figure 17. Lodging Tax – Livingston CVB, 2015-2022



Hotel Inventory

Although the Murray Hotel, with 30 rooms, is the only official hotel in the Downtown Study Area as of 2023, boutique hotels that operate on short-term rental platforms, such as the Grabow Hotel, also exist.

As shown below in **Table 8**, 11 hotels are in Livingston (approximately one-third of Park County hotels) that accommodate a total of 489 rooms. A Home2 Suites by Hilton is currently under construction, which will add an additional 90 rooms.

Table 8. Hotel Inventory, 2023

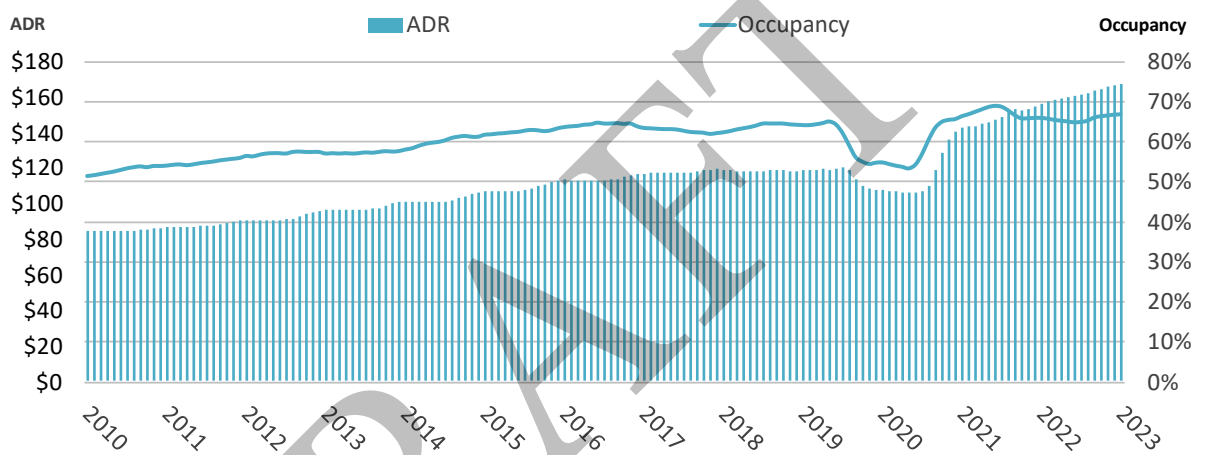
Hotel Inventory	Buildings	Rooms
Study Area	1	30
Livingston	11	489
Park County	30	1,323

Source: CoStar; Economic & Planning Systems

Hotel ADR and Occupancy

After declining during the COVID-19 pandemic, which had large impacts on the hospitality sector, the average daily rate (ADR) of Livingston’s hotels have recovered and were at their highest in 2023 at approximately \$167 by the end of the year. Trailing 12-month average occupancy rates peaked in late 2021 into 2022, but as of summer 2023, Livingston’s hotel occupancy rate was about 80 percent, which was higher than the previous summer. These occupancy rates indicated increased demand for new hotel rooms in the city.

Figure 18. 12 Month ADR and Occupancy – Livingston, 2010-2023



Source: CoStar; Economic & Planning Systems

Short-Term Rentals

As of early 2024, the City of Livingston’s 229 active short term rental listings generated an average annual revenue of \$67,400 over the past 12 months, according to AirDNA. This average is increased by rental properties on large plots of land in scenic areas surrounding the core of Livingston. Within Downtown Livingston, average annual revenues are lower, typically ranging from approximately \$10,000 to \$30,000 annually.

Short-term rentals in the Livingston market have a 12-month average monthly occupancy rate of 57 percent and an average daily rate (ADR) of \$320.50 per night. Short-term rentals in Downtown Livingston vary in price, but in general a rental for 2 to 4 people costs between \$150 and \$400 per night in the summer and larger rentals can command a rate of \$700 per night and up. In the winter months, nightly rates can drop as low as \$100 per night. Only 1.6 percent of short-term rental listings have a minimum stay of 30+ nights and 90.0 percent of listings have a minimum stay of three nights or less. This indicates that there is not currently a high demand for medium-term rentals in Livingston.

4. Housing Demand Study

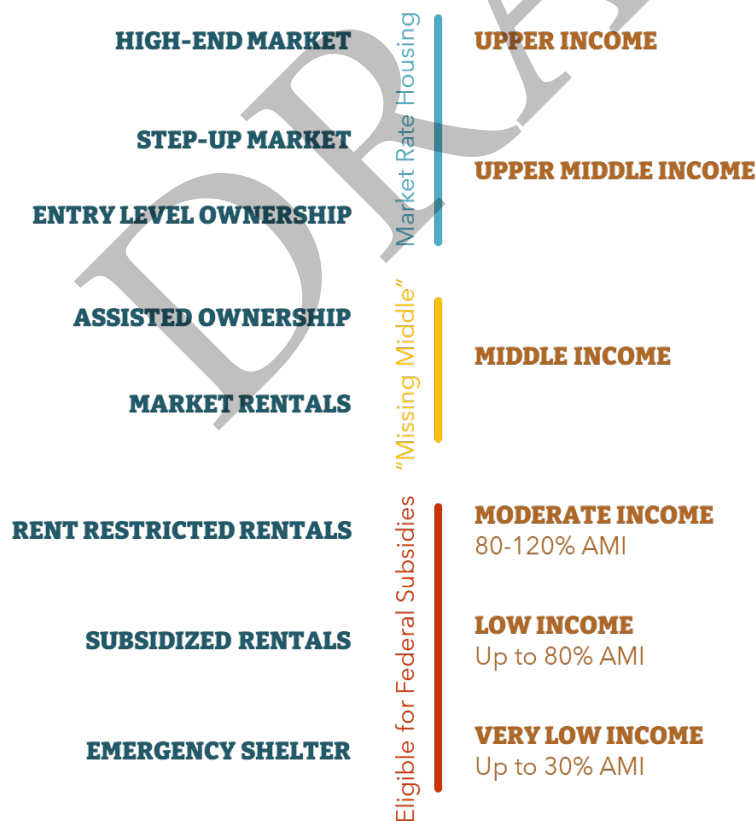
Existing Housing Gaps

Income Level Definitions

The graphic shown below illustrates how various income levels are linked with different types of housing and housing programs. The boundaries of each income range are not always fixed as shown below, as there needs to be consideration of the local context and market conditions. There is an important distinction between 60 to 80% of AMI since federal and state funding for housing development generally ends above 60% of AMI, with some more limited programs that extend to 80% of AMI (e.g., income averaging in LIHTC projects).

Income-restricted and other deed-restricted homeownership programs are typically in the 80 to 120% AMI range. With that said, programs and policies can extend above these ranges in high-cost housing markets.

Figure 19. Housing Program Income Levels

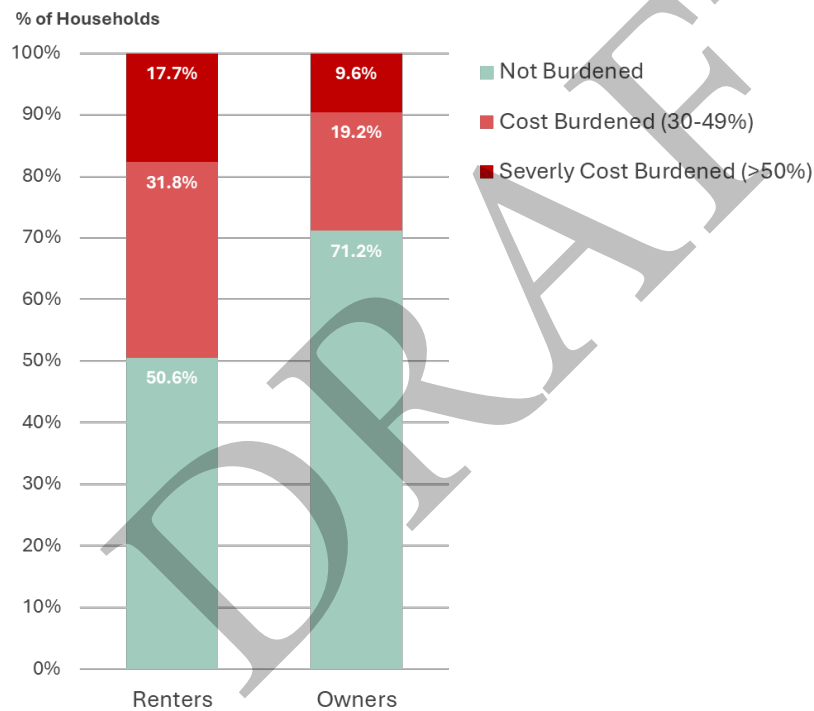


Cost Burden

Households that pay more than 30 percent of their income towards housing payments (rent or mortgage) are defined as housing cost burdened, and households that pay more than 50 percent of their income are severely cost burdened.

As shown in **Figure 20**, nearly half of renter households (49.5 percent) in Livingston are cost burdened or severely cost burdened. In comparison, approximately 28.8 percent of households who own their homes are cost burdened. Since homeowners typically have more stable housing and housing costs, a higher share of renter households are typically more likely to be cost burdened.

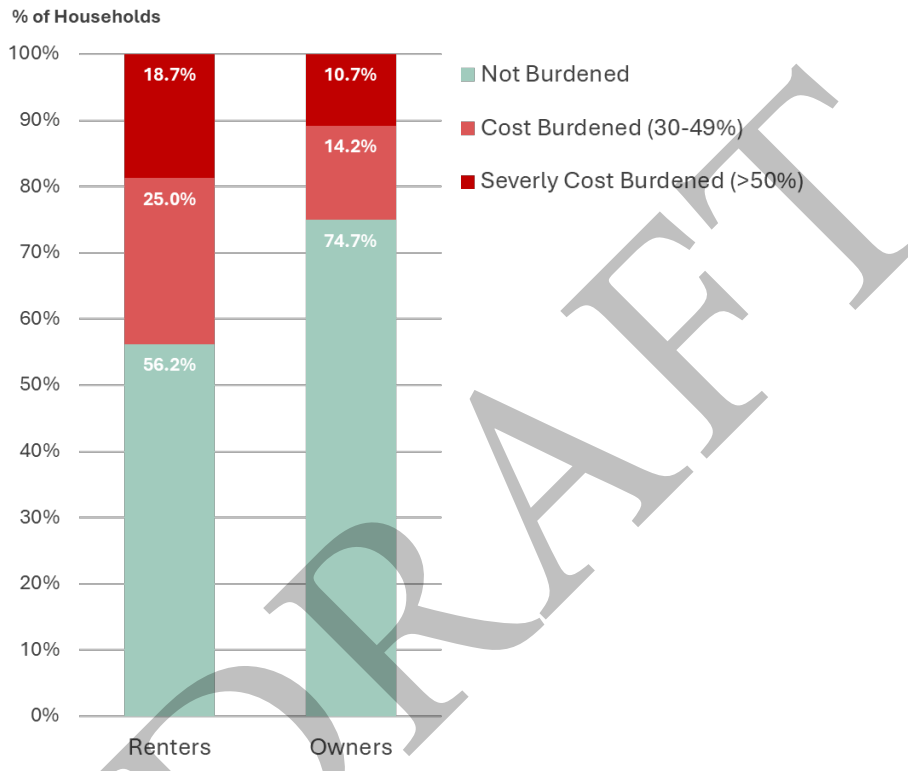
Figure 20. Housing Cost Burden by Household Type – Livingston, 2022



Source: U.S. Census ACS 5-Year Estimates, Economic & Planning Systems

Countywide, less than half of renter households (43.7 percent) are cost burdened, and a quarter of homeowners (24.9 percent) are cost burdened (**Figure 21**). Although there is a lower share of cost burdened households in Park County compared to Livingston, there is a slightly higher share of extremely cost burdened households countywide spending over 50 percent of income on housing costs.

Figure 21. Housing Cost Burden by Household Type – Park County, 2022

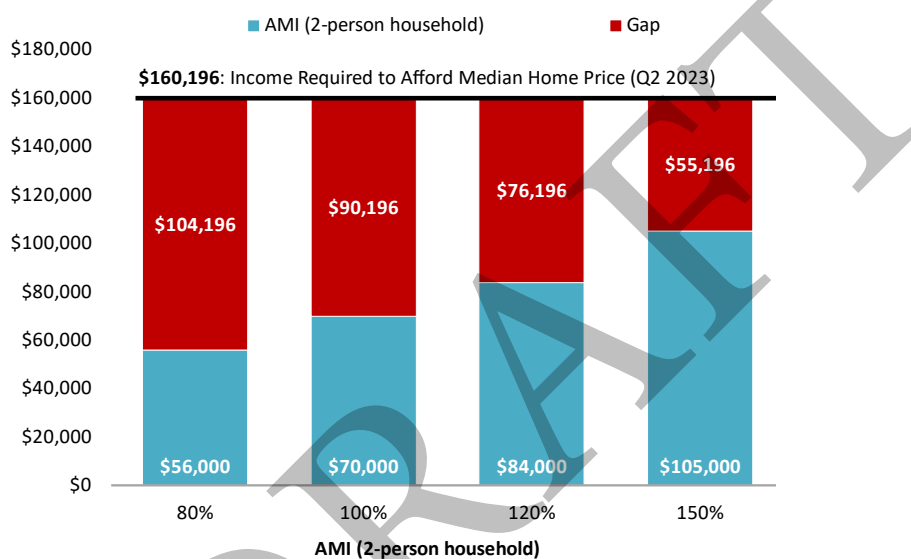


Source: U.S. Census ACS 5-Year Estimates, Economic & Planning Systems

Ownership Income Gap

As shown in **Figure 22**, a household income of approximately \$160,000 is required to afford a single-family home in Livingston at the median sale price (as of Q2 2023). Based on Park County’s 2023 AMI for a 2-person household, households with an income equivalent to the AMI (\$70,000) would need to earn an additional \$90,000 per year to afford a house at the median price. A household earning 150% of the AMI would still require an additional \$55,000 annually to afford a home at this price point.

Figure 22. Income Gap to Afford Median Priced Single-Family Home – Livingston, 2023



As shown in **Table 9**, approximately 60 percent of households who own their home have a household income below the 150% of AMI threshold. As of 2022, nearly 40 percent of households had a household income above 150% of Park County’s 2023 AMI.

Table 9. Owner Households by AMI – Park County, 2022

Description	2022	
	Total	% Total
Owner Households		
Less than 30% AMI	527	9.3%
31% to 60% AMI	601	10.6%
61% to 80% AMI	553	9.8%
81% to 100% AMI	597	10.6%
101% to 120% AMI	543	9.6%
121% to 150% AMI	653	11.5%
Greater than 150% AMI	<u>2,184</u>	38.6%
	5,658	

Source: U.S. Census; Economic & Planning Systems

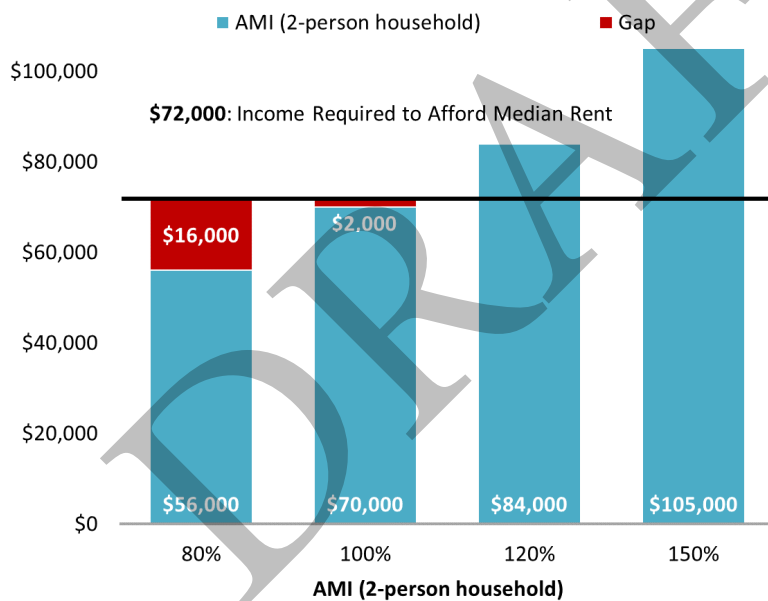
Rental Income Gap

Though long-term rents in Livingston vary and there are data gaps on rent rates in smaller communities, the median rent in Livingston is approximately \$1,900. To afford this monthly rent, a household needs to earn \$72,000 in annual income.

Figure 23 shows that based on Park County’s 2023 AMI, a 2-person household earning 80% of the AMI would need to earn an additional \$16,000 per year to afford a monthly rental at this price. Additionally, a household earning 100% of the AMI would require an extra \$2,000 annually to afford this monthly rent without being rent burdened.

Unlike the homeownership income gap shown in **Figure 22**, a renter living alone earning approximately 102% of the AMI and above would be able to afford a rental unit priced at the median rate.

Figure 23. Income Gap to Afford Median Rent – Livingston, 2023



Source: HUD; Zillow; Economic & Planning Systems

Around 65 percent of renters have a household income below the AMI for a 2-person household in Park County as of 2022 (**Table 10**). This indicates that nearly two-thirds of households are unable to afford above \$2,000 a month in rent.

Table 10. Renter Households by AMI – Park County, 2022

Description	2022	
	Total	% Total
Renter Households		
Less than 30% AMI	452	18.9%
31% to 60% AMI	562	23.5%
61% to 80% AMI	378	15.8%
81% to 100% AMI	168	7.0%
101% to 120% AMI	162	6.8%
121% to 150% AMI	225	9.4%
Greater than 150% AMI	<u>450</u>	18.8%
	2,397	

Source: U.S. Census; Economic & Planning Systems

Future Demand

In this section, a housing demand projection is provided to show growth potential and future housing needs in Livingston and Park County.

Commuting Workers

In 2021, 57.1 percent of jobs in Livingston were filled by in-commuters, which is an increase from 52.8 percent in 2010. This reduction in resident-filled jobs indicates that Livingston’s workforce may be moving to nearby areas with lower housing costs (**Table 11**) or businesses are needing to attract workers from further away to fill positions.

Table 11. Livingston Commuting Patterns, 2010-2021

Commuting Patterns	2010	2021
Livingston Jobs		
Filled by Residents	47.2%	42.9%
In-Commuters	52.8%	57.1%

Source: U.S. Census LEHD; Economic & Planning Systems

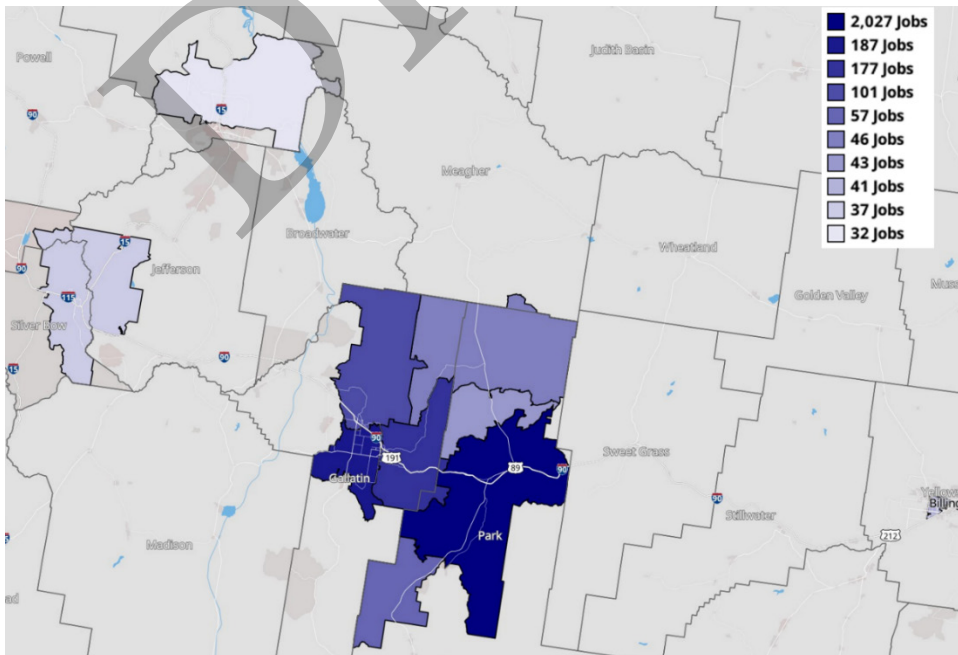
As shown in **Table 12** and **Figure 24**, the majority of Livingston workers who are in-commuters live in other areas of Park County, as well as nearby Gallatin County. Approximately 17.5 percent of Livingston workers live in areas outside of these zip codes.

Table 12. Where Livingston Workers Live, 2021

Home Origin	In-Commuters	
	Workers	% Total
Zip Code		
59047 (Livingston)	2,027	60.9%
59718	187	5.6%
59715	177	5.3%
59714	101	3.0%
59027	57	1.7%
59086	46	1.4%
59018	43	1.3%
59102	41	1.2%
59701	37	1.1%
59602	32	1.0%
All Other Locations	<u>583</u>	<u>17.5%</u>
Total	3,331	100.0%

Source: U.S. Census LEHD; Economic & Planning Systems

Figure 24. Livingston Workers by Home Zip Code, 2021



Employment Driven Demand

A housing demand projection is provided in **Table 13** that links job growth to housing demand. This projection estimates that Park County needs roughly 130 housing units annually to keep up with job growth at 2.0 percent per year (for reference, the average annual rate of growth since 2010 has been 0.9 percent in the City of Livingston).

This projection accounts for strong market demand drivers such as Livingston becoming more of a destination for second homeowners, part-time residents, and remote workers. Based on these housing demand projections, Livingston can support approximately 85 new housing units per year.

Table 13. Livingston Housing Demand Projection

Description	Factor	2022	2032	2022-2032	
				Total	Annual
Total Jobs - Park County	2.0%	7,994	10,000	2,006	201
Employed People	1.08 jobs/empl.	7,402	9,259	1,857	186
Employed Households	1.50 jobs/household	4,930	6,170	1,240	124
Normal Vacancy Adjustment	5%	260	320		
Housing Units - Park County		5,190	6,490	1,300	130
Baseline Demand - Park County					
Livingston Market Share	65.0%	3,370	4,220	850	85

Source: JobsEQ; U.S. Census; Economic & Planning Systems

Employment-Based Affordability

Table 14 below shows the alignment between job growth, wages, and Park County AMI levels. Based on the assumption that a household brings in 1.5 incomes, average wages for jobs in the Agriculture/Forestry/Fishing, Arts/Entertainment/Recreation, Accommodation/Food Services, and Retail Trade industries equate to a household income below 80% of the AMI for a 2-person household. Beyond these industries, the average annual wage increases with the Mining industry at the top, which has an average annual wage of \$96,000. For a 2-person household, this income equates to 206% of the AMI.

Over 80 percent of the job growth in Park County from 2018 to 2023 has been in industries that translate into household incomes below 120% of AMI. To support employment growth in the county, there needs to be an increase in the number of rental units and for-sale housing options that are priced lower than the current average for the county.

Table 14. Employment Based Affordability

Industry	Avg. Wage 2023	Household Income [1.5] 2023	AMI Ranges			
			60-80% AMI	80-120% AMI	120-140% AMI	Above 140% AMI
Industry	Avg. Wage 2023	Household Income [1.5] 2023	2-Person HH AMI 2023			
Ag./Forestry/Fishing	\$31,670	\$47,505	67.9%			
Arts/Entertainment/Rec.	\$32,616	\$48,924	69.9%			
Accomm./Food Services	\$33,344	\$50,016	71.5%			
Retail Trade	\$37,049	\$55,574	79.4%			
Other Services (ex. Public Admin.)	\$38,701	\$58,051	82.9%			
Education	\$39,503	\$59,255	84.6%			
Real Estate	\$43,561	\$65,341	93.3%			
Construction	\$54,111	\$81,167	116.0%			
Transport./Warehousing	\$56,717	\$85,076	121.5%			
Public Admin.	\$58,672	\$88,007	125.7%			
Health Care	\$60,171	\$90,257	128.9%			
Finance	\$60,351	\$90,526	129.3%			
Admin. and Waste Services	\$64,748	\$97,122	138.7%			
Information	\$65,247	\$97,870	139.8%			
Prof./Tech Services	\$69,032	\$103,549	147.9%			
Manufacturing	\$71,158	\$106,736	152.5%			
Unclassified	\$74,583	\$111,874	159.8%			
Management	\$81,241	\$121,862	174.1%			
Utilities	\$82,247	\$123,371	176.2%			
Wholesale Trade	\$91,134	\$136,701	195.3%			
Mining	\$96,093	\$144,139	205.9%			

Source: JobsEQ; Economic & Planning Systems

Estimated Demand

An estimated unit mix for the projected housing demand is shown in **Table 15**. This housing mix is based on past construction trends and future housing needs projected based on employment growth.

Table 15. Livingston Housing Unit Projection

Description	Factors	2022-2026	2027-2032	Total	Annual
New Unit Demand in Livingston	85/yr.	425	425	850	85
Livingston Construction Projection					
Single-Family (Detached)	40.0%	170	170	340	34
Townhome/Triplex/Duplex	20.0%	85	85	170	17
Multifamily	40.0%	170	170	340	34
Total	100.0%	425	425	850	85

[1] Mobile homes and other miscellaneous housing types are not included
 Source: Economic & Planning Systems

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5. Feasibility Analysis

The feasibility of housing development in Downtown Livingston was analyzed to support the Downtown Master Plan. Potential housing types that are likely in demand in Livingston were identified and aligned with potential development sites to test feasibility on potential, real-world projects.

To assess feasibility, EPS developed a static pro forma feasibility model to illustrate cost and revenue factors associated with the most supportable housing product types in the Downtown Livingston Study Area.

Project Prototypes

Based on the housing study and outreach to the development/real estate community in Livingston, three housing prototypes were identified that are likely supportable in Downtown. The three housing prototypes analyzed are summarized in **Table 16**.

Table 16. Project Prototypes

Option	Option 1	Option 2	Option 3
Description	4-Story Mixed-Use Condo (Behind the Murray Hotel)	3-Story Walk-Up Apartment (NW Energy Lot)	3-Story Townhomes (Front Street Lot)
Zoning	Mixed-Use	Mixed-Use	Mixed-Use
Stories	4-Story	3-Story	3-Story
Parking	Parking Garage	Tuck Under / Surface	Tuck Under / Surface

Option 1: Mixed-Use Condo Building Behind the Historic Murray Hotel

As shown in **Table 17**, the option 1 prototype is a 4-story, mixed-use condominium building. This prototype consists of 24 residential units including 4 penthouses, 3,000 square feet of ground floor retail space, and a parking garage with 30 spaces (a ratio of 1.25 spaces per unit).

The average unit size is 2,200 square feet for penthouse units and 880 square feet for the other residential units. The net leasable building area is 26,400 square feet, and the gross building area is 29,520 square feet.

Sales Price and Costs

Assumption on sales prices and projects costs for Option 1 are shown in **Table 17**. This prototype assumes that penthouse units have a sales price of \$700 per square foot and condo units have a sales price of \$400 per square foot.

Vertical construction costs are set at \$350 per square foot for multifamily uses and \$300 per square foot for retail space based on information from local stakeholders and similar projects. Costs for parking garage construction are set at \$25,000 per parking space. Land acquisition costs are \$100 per square foot due to the site's desirable location in the Downtown core. Site work costs are set at \$10 per square foot of land.

Table 17. Option 1 Project Summary

LOT AREA		
Front (Feet)		100
Side (Feet)		135
Total Area (sq. ft.)		13,500
Total Area (ac.)		0.31
COMMERCIAL		
Gross Building Area		
Ground Level		3,000
Efficiency Factor		100%
Net Leasable Area		
Ground Level		3,000
Average Rental Rate (NNN)		\$20
MULTIFAMILY		
Gross Building Area		
Ground Level		0
Floor 2		9,840
Floor 3		9,840
Penthouse		9,840
Total		29,520
Efficiency Factor		89%
Net Leasable Area		
Ground Level		0
Floor 2		8,800
Floor 3		8,800
Penthouse		8,800
Total		26,400
Units		
Penthouse		4
Condo/Townhome		20
Total		24
Average Unit Size		
Penthouse		2,200
Condo/Townhome		880
Rates/Prices		
For-Sale (Price per SF)		
Penthouse		\$700
Condo/Townhome		\$400
PARKING		
Parking Summary		
Garage		<u>30</u>
Total		30
PROJECT COSTS		
Hard Costs		
Land Cost	per land sf	\$100
Site Cost	per land sf	\$10
Parking Garage Cost	per space	\$25,000
Building Cost - Multifamily	per sf	\$350
Building Cost - Commercial	per sf	\$300

Source: Economic & Planning Systems

Soft costs, which include design, architecture, developer fees, permits, etc., are estimated to be around \$2.38 million (**Table 18**). The total cost for this project is estimated to be \$15.85 million, which equates to \$487 per square foot (of the building gross area) and \$660,497 per unit.

Per unit and in total, this option has the highest construction costs partially due to this site’s higher land value.

Table 18. Option 1 Project Costs

PROJECT COSTS		
Acquisition and Site		\$ 1,485,000
Acquisition Cost		\$ 1,350,000
General Site Costs		\$ 135,000
Land Cost per Unit		\$56,250
Hard Costs		\$ 11,982,000
Parking Garage Cost	\$25,000 per space	\$ 750,000
Building Cost - Multifamily	\$350 per sf	\$10,332,000
Building Cost - Commercial	\$300 per sf	\$ 900,000
Soft Costs		\$ 2,384,924
Design and Architecture	5.0% % of vertical costs	\$ 516,600
Building Permits	1.0% % of HC	\$ 119,820
FF&E, Taxes, Insurance & Marketing	7.5% % of HC	\$ 898,650
Developer Fee	5.0% % of Total Cost	\$ 750,104
Residential Impact Fees	\$3,330 per unit	\$ 79,920
Commercial Impact Fees	\$6,610 per 1,000 sq. ft.	\$ 19,830
% of Hard Costs		19.9%
TOTAL CONSTRUCTION COST		\$ 14,366,924
TOTAL COST		\$ 15,851,924
Per GBA		\$487
Per Unit		\$660,497

Source: Economic & Planning Systems

Operating expenses for this option (shown in **Table 19**) total \$1,953, which for this prototype includes a management fee set at 3.5 percent of the Effective Gross Income.

Table 19. Option 1 Operating Revenue and Expenditures, Static

Type	Factor	Rate	Lease Rate per year	Total Revenue	% of Total
REVENUE					
	Units	NRSF			
Multifamily		26,400 NRSF		\$ 14,171,873	
For-Sale	24				
Penthouse	4	8,800 NRSF	\$700 per sf	\$ 6,159,938	
Condo/Townhome	20	17,600 NRSF	\$400 per sf	\$ 7,039,930	
Garage Spaces	30		\$50,000 per space	\$ 1,500,000	
Sales Cost	4.0% of income		22,000 per unit	\$ (527,995)	
Commercial Income				\$ 60,000	100.0% of PGI
Ground Level		3,000 sf	\$20 per sf	\$ 60,000	100.0% of PGI
POTENTIAL GROSS INCOME (PGI)				\$ 60,000	100.0% of PGI
Less: Vacancy (Commercial)	7% per year			\$ (4,200)	-7.0% of PGI
EFFECTIVE GROSS INCOME (EGI)				\$ 55,800	93.0% of PGI
EXPENDITURES					
Non-Variable Expenses			Adjustment	\$ (1,953)	3.5% of EGI
Management Fee	3.5% of EGI	\$55,800 EGI	100% of total	\$ (1,953)	3.5% of EGI
TOTAL OPERATING EXPENSES				\$ (1,953)	3.5% of EGI
TOTAL EXPENSES				\$ (1,953)	3.5% of EGI
UNLEVERAGED RETURN METRICS					
Net Operating Income				\$ 53,847	96.5% of EGI
Est. Rental Value				\$ 828,415	6.5% Cap rate
Sale Revenue				\$14,171,873	
Total Project Value				\$15,000,289	
Total Project Cost				\$15,851,924	
Project Return				\$ (851,635)	
Return on Cost				-5.37%	
Hurdle Rate				12.00%	

Source: Economic & Planning Systems

Feasibility Gaps

Assessing the financial feasibility of a project involves estimating metrics of return. Return on cost shows the net annual income that a project generates in a particular year relative to its total cost to build. The return a project generates is compared to a hurdle rate, or the rate of return that a project would need to generate in order to be financially feasible. If the rate of return of the project is lower than the hurdle rate, then the project has a financial feasibility gap.

Option 1’s project return on cost is estimated to be -5.4 percent, as shown in **Table 20**. With a 12 percent hurdle rate, this development has an overall feasibility gap of \$2.75 million, which is 17 percent of total project costs. This financial feasibility gap means that this prototype has major barriers to feasibility. Major drivers of feasibility that would need to change for the project to be feasible include the achievable sale prices, construction cost, and cost of land. The smaller condo units in the project are priced around \$500,000, which may be affordable to a sizable portion of the Livingston workforce. Higher prices would mean that units would need to sell to luxury buyers and likely be oriented towards retirees or second homeowners, similar to the penthouse units.

It will be challenging to find a large enough buyer pool of retirees/second homeowners to support this size of project. While the prototype attempts to be oriented towards both types of buyers, the luxury condo market will likely need to be supported through smaller projects or adaptive reuse projects of older buildings.

Table 20. Option 1 Project Return on Cost and Gap

PROJECT RETURN AND GAP	
PROJECT COST	
Total Cost	\$15,851,924
Per GBA	\$487
Per Unit	\$660,497
STATIC EVALUATION	
Return on Cost	
Total Project Value	\$15,000,289
Total Project Cost	\$15,851,924
Project Return	-\$851,635
Return on Cost	-5.4%
Target	12.0%
Target Return	\$1,902,231
Gap	\$2,753,866
Gap per Unit	\$114,744

Source: Economic & Planning Systems

Option 2: Apartment Building at the Northwest Energy Site

The second housing prototype is a 3-story apartment building containing 42 rental units with an average unit size of 755 square feet. Parking includes 30 surface parking spaces and 22 tuck under spaces (a ratio of 1.24 spaces per unit). Of the three development prototypes, this option, located at 209 S B St, is on the largest lot. As shown in **Table 21**, the building's gross area is 37,300 square feet, with a net leasable area of 31,705 square feet.

Table 21. Option 2 Project Summary

LOT AREA	
Front (Feet)	175
Side (Feet)	135
Total Area (sq. ft.)	23,625
Total Area (ac.)	0.54
MULTIFAMILY	
Gross Building Area	
Ground Level	12,433
Floor 2	12,433
Floor 3	12,433
Total	37,300
Efficiency Factor	85%
Net Leasable Area	
Ground Level	10,568
Floor 2	10,568
Floor 3	10,568
Total	31,705
Units	
Market Rate Rental	42
Total	42
Average Unit Size	
Market Rate Rental	755
For-Rent (Rent per SF)	
Market Rate	\$2.25
PARKING	
Parking Summary	
Surface	30
Tuck Under	22
Garage	0
Total	52
PROJECT COSTS	
Hard Costs	
Land Cost	\$25
Site Cost	\$10
Surface Parking Cost	\$3,500
Tuck Under Cost	\$5,000
Parking Garage Cost	\$25,000
Building Cost - Multifamily	\$250

Sales Price and Costs

Assumptions on sales prices and project costs are shown in **Table 21**. The rental rate for this prototype is set as \$2.25 per square foot. Vertical construction costs are set at \$250 per square foot, which is a lower cost than Option 1. Construction costs for parking are set at \$3,500 per surface parking space and \$5,000 per tuck under space. Land acquisition costs are much lower than Option 1 (\$25 per square foot) since this site is in a less central location Downtown. Site work costs are set at \$10 per square foot of land.

As shown below in **Table 22**, soft costs for Option 2 are estimated to be around \$2 million. With total hard costs estimated at \$9.54 million, the total cost for this project is estimated to be \$12.37 million. This translates to \$332 per building square foot and \$294,431 per residential unit.

Table 22. Option 2 Project Costs

PROJECT COSTS		
Acquisition and Site		\$ 826,875
Acquisition Cost		\$ 590,625
General Site Costs		\$ 236,250
Land Cost per Unit		\$14,063
Hard Costs		\$ 9,540,000
Surface Parking Cost	\$3,500 per space	\$ 105,000
Tuck Under Cost	\$5,000 per space	\$ 110,000
Parking Garage Cost	\$25,000 per space	\$ -
Building Cost - Multifamily	\$200-\$400 per sf	\$ 9,325,000
Building Cost - Commercial	\$300 per sf	\$ -
Soft Costs		\$ 1,999,211
Design and Architecture	5.0% % of vertical costs	\$ 466,250
Building Permits	1.0% % of HC	\$ 95,400
FF&E, Taxes, Insurance & Marketing	7.5% % of HC	\$ 715,500
Developer Fee	5.0% % of Total Cost	\$ 582,201
Residential Impact Fees	\$3,330 per unit	\$ 139,860
Commercial Impact Fees	\$6,610 per 1,000 sq. ft.	\$ -
% of Hard Costs		21.0%
TOTAL CONSTRUCTION COST		\$ 11,539,211
TOTAL COST		\$ 12,366,086
Per GBA		\$332
Per Unit		\$294,431

Source: Economic & Planning Systems

Since this prototype is a rental property, annual operating expenses are much higher than Option 1. Shown in **Table 23**, this property is expected to generate an Effective Gross Income (EGI) of \$847,661 annually, while annual expenses total around \$214,326. This equates to a net operating income of \$633,335.

Table 23. Option 2 Operating Revenues and Expenditures, Static

Type	Factor	Rate	Lease Rate per year	Total Revenue	% of Total
REVENUE					
Multifamily	Units	NRSF			
		31,705 NRSF		\$ -	
Rental	42			\$ 856,035	
Market Rate Rental	42	31,705 NRSF	\$2.25 per sf	\$ 856,035	95.9% of PGI
Other MF Income				\$ 36,240	4.1% of PGI
Parking Revenue	100% of units	52 units	\$50 per unit/mo	\$ 31,200	3.5% of PGI
Trash Fee	100% of units	42 units	\$10 per unit/mo	\$ 5,040	0.6% of PGI
POTENTIAL GROSS INCOME (PGI)				\$ 892,275	100.0% of PGI
Less: Vacancy (Residential)	5.0% per year			\$ (44,614)	-5.0% of PGI
EFFECTIVE GROSS INCOME (EGI)				\$ 847,661	95.0% of PGI
EXPENDITURES					
Variable Operating Expenses	\$2,749 per unit/yr.		Adjustment	\$ (115,458)	13.6% of EGI
Repairs & Maintenance	\$250 per unit/yr.	42 units	100% of total	\$ (10,500)	1.2% of EGI
Service Contracts	\$200 per unit/yr.	42 units	100% of total	\$ (8,400)	1.0% of EGI
Turnover Costs	\$199 per unit/yr.	42 units	100% of total	\$ (8,358)	1.0% of EGI
Payroll (Inc. Taxes & Benefits)	\$1,250 per unit/yr.	42 units	100% of total	\$ (52,500)	6.2% of EGI
Administrative	\$250 per unit/yr.	42 units	100% of total	\$ (10,500)	1.2% of EGI
Leasing & Marketing	\$100 per unit/yr.	42 units	100% of total	\$ (4,200)	0.5% of EGI
Utilities	\$500 per unit/yr.	42 units	100% of total	\$ (21,000)	2.5% of EGI
Non-Variable Expenses			Adjustment	\$ (86,268)	10.2% of EGI
Property Taxes	0.3% of value	\$13,333,368 total val.	100% of total	\$ (44,000)	5.2% of EGI
Insurance	\$300 per unit/yr.	42 units	100% of total	\$ (12,600)	1.5% of EGI
Management Fee	3.5% of EGI	\$847,661 EGI	100% of total	\$ (29,668)	3.5% of EGI
TOTAL OPERATING EXPENSES				\$ (201,726)	23.8% of EGI
Replacement Reserves			Adjustment	\$ (12,600)	1.5% of EGI
Replacement Reserves	\$300 per unit/yr.	42 units	100% of total	\$ (12,600)	1.5% of EGI
TOTAL EXPENSES				\$ (214,326)	25.3% of EGI
UNLEVERAGED RETURN METRICS					
Net Operating Income				\$ 633,335	74.7% of EGI
Est. Rental Value				\$ 13,333,368	4.8% Cap rate
Sale Revenue				\$ -	
Total Project Value				\$ 13,333,368	
Total Project Cost				\$ 12,366,086	
Project Return				\$ 967,282	
Return on Cost				7.82%	
Hurdle Rate				12.00%	

Source: Economic & Planning Systems

Feasibility Gaps

Option 2’s return on cost is estimated to be 7.8 percent, as shown in **Table 24**. Although this option generates a positive return, unlike Option 1, the return on cost is still lower than the target return rate of 12 percent. Based on these assumptions, this development has a financial feasibility gap of \$516,648. Compared to Option 1, this option is potentially viable if certain elements can be addressed, or public support can be gained. The focus of this type of project is oriented towards the Livingston workforce with rental rates for units around \$1,700 per month.

The urban renewal authority may be interested in supporting this type of project with tax increment dollars to cover public costs and closing the feasibility gap. Depending on rental rates for the project compared to income/rental limits for affordable housing in the county, there may be potential to seek financing support through tools aimed at developing affordable housing (e.g., low-income housing tax credits).

Table 24. Option 2 Project Return on Cost and Gap

PROJECT RETURN AND GAP	
PROJECT COST	
Total Cost	\$12,366,086
Per GBA	\$332
Per Unit	\$294,431
STATIC EVALUATION	
Return on Cost	
Total Project Value	\$13,333,368
Total Project Cost	\$12,366,086
Project Return	\$967,282
Return on Cost	7.8%
Target	12.0%
Target Return	\$1,483,930
Gap	\$516,648
Gap per Unit	\$12,301

Source: Economic & Planning Systems

Option 3: Townhomes on Front Street

The third housing prototype analyzed includes 12 for-sale townhomes with an average unit size of 1,667 square feet. These townhouses, located at a site at the corner of W Front Street and N Main St, are 3-stories each with tuck under parking. As shown in **Table 25**, this development has a gross area of 20,000 square feet, and since these are townhouse units, the net leasable area is also 20,000 square feet.

Table 25. Option 3 Project Summary

LOT AREA		
Front (Feet)		100
Side (Feet)		135
Total Area (sq. ft.)		13,500
Total Area (ac.)		0.31
MULTIFAMILY		
Gross Building Area		
Ground Level		0
Floor 2		10,000
Floor 3		10,000
Penthouse		0
Total		20,000
Efficiency Factor		100%
Net Leasable Area		
Ground Level		0
Floor 2		10,000
Floor 3		10,000
Penthouse		0
Total		20,000
Units		
Condo/Townhome		12
Average Unit Size		
Condo/Townhome		1,667
Rates/Prices		
For-Sale (Price per SF)		
Condo/Townhome		\$300
PARKING		
Parking Summary		
Tuck Under		19
PROJECT COSTS		
Hard Costs		
Land Cost	per land sf	\$25
Site Cost	per land sf	\$10
Tuck Under Cost	per space	\$5,000
Building Cost - Multifamily	per sf	\$200

Sales Price and Costs

Assumptions used for sales prices and project costs are shown in **Table 25**. These townhouse units are assumed to sell for \$300 per square foot.

Vertical construction costs are set at \$200 per square foot, which is the lowest cost option of the three options. Construction costs for parking are set at \$5,000 per tuck under space (note that a two-car garage would count as two spaces). Land acquisition costs are set at the same lower rate as Option 2 (\$25 per square foot) due to the site's location. Consistent with the other two options, site work costs are set at \$10 per square foot of land.

Soft costs for Option 3 are estimated to total \$843,814 and hard costs are estimated to be nearly \$4.1 million. This prototype's total project cost is estimated to be \$5.4 million, which equals \$271 per building square foot and \$450,943 per townhome (**Table 26**).

Table 26. Option 3 Project Costs

PROJECT COSTS			
Acquisition and Site			
Acquisition Cost			\$ 472,500
Acquisition Cost			\$ 337,500
General Site Costs			\$ 135,000
Land Cost per Unit			\$28,125
Hard Costs			
Tuck Under Cost	\$5,000 per space		\$ 95,000
Building Cost - Multifamily	\$200 per sf		\$ 4,000,000
Soft Costs			
Design and Architecture	5.0% % of vertical costs		\$ 200,000
Building Permits	1.0% % of HC		\$ 40,950
FF&E, Taxes, Insurance & Marketing	7.5% % of HC		\$ 307,125
Developer Fee	5.0% % of Total Cost		\$ 255,779
Residential Impact Fees	\$3,330 per unit		\$ 39,960
% of Hard Costs			20.6%
TOTAL CONSTRUCTION COST			
			\$ 4,938,814
TOTAL COST			
			\$ 5,411,314
Per GBA			\$271
Per Unit			\$450,943

Source: Economic & Planning Systems

Since Option 3 is a townhome development, there are no annual operating expenses and the revenue generated from this project is solely from townhouse sales, as shown in **Table 27**.

Table 27. Option 3 Operating Revenues and Expenditures, Static

Type	Factor	Rate	Lease Rate per year	Total Revenue	% of Total
REVENUE					
Multifamily	Units	NRSF		\$ 5,760,000	
For-Sale	12	20,000 NRSF			
Condo/Townhome	12	20,000 NRSF	\$300.00 per sf	\$ 6,000,000	
Sales Cost	4% of income		20,000 per unit	\$ (240,000)	
EXPENDITURES					
TOTAL OPERATING EXPENSES				\$ -	0.0% of EGI
TOTAL EXPENSES				\$ -	0.0% of EGI
UNLEVERAGED RETURN METRICS					
Net Operating Income				\$ -	0.0% of EGI
Est. Rental Value				\$ -	4.5% cap rate
Sale Revenue				\$ 5,760,000	
Total Project Value				\$ 5,760,000	
Total Project Cost				\$ 5,411,314	
Project Return				\$ 348,686	
Return on Cost				6.44%	
Hurdle Rate				12.00%	

Source: Economic & Planning Systems

Feasibility Gaps

This prototype has a return on cost of 6.4 percent (**Table 28**). Like Option 2, this option generates a positive return, but this return rate still does not reach the targeted rate of 12 percent. Based on this model’s assumptions, the townhome development option has a financial feasibility gap of \$300,671.

While Option 3 has the smallest financing gap, the need for additional financing support for this development to be feasible still exists based on its current configuration. The units are priced at an average of \$500,000, which is near the threshold for being too high to be affordable for the majority of the Livingston workforce. Achieving higher prices will make this project feasible but may limit the buyer pool. Different configurations and lower land costs could also lead to a feasible project.

Potential financial support or regulatory waivers may help to make these types of projects feasible with the goal of trying to expand the Downtown housing base and provide more housing options.

Table 28. Option 3 Project Return on Cost and Gap

PROJECT RETURN AND GAP	
PROJECT COST	
Total Cost	\$5,411,314
Per GBA	\$271
Per Unit	\$450,943
STATIC EVALUATION	
Return on Cost	
Total Project Value	\$5,760,000
Total Project Cost	\$5,411,314
Project Return	\$348,686
Return on Cost	6.4%
Target	12.0%
Target Return	\$649,358
Gap	\$300,671
Gap per Unit	\$25,056

Source: Economic & Planning Systems



Parking Supply and Utilization Study

DRAFT

July 31, 2024

LIVINGSTON DOWNTOWN MASTER PLAN

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Appendix

- Appendix A: Parking Lot Utilization Data
- Appendix B: On-street Utilization Data

1.0. INTRODUCTION

Livingston is located approximately 25 miles east of Bozeman and about 50 miles north of Yellowstone National Park. Its location makes it a popular destination for tourists and outdoor recreationists, predominantly during spring and summer months. It is also home to many Bozeman commuters seeking more affordable housing options. As regional growth pressures mount and tourism increases, the need for a cohesive vision for downtown Livingston is needed to revitalize underutilized areas and support the local economy that is heavily influenced by seasonal tourism.

In 2021, the City of Livingston adopted a Growth Policy that created a common vision for Livingston's future by guiding responsible growth while preserving the town's unique sense of place. An outcome of the Growth Policy was an action item to develop a comprehensive Downtown Master Plan to guide future growth. Accordingly, the City of Livingston has initiated a planning process to develop the *Livingston Downtown Master Plan* to provide a proactive approach to managing growth while maintaining the downtown's unique character and enhancing economic vitality.

As a supplemental component of the Master Plan, a parking study was conducted. Parking availability is an important consideration as the city contemplates growth and redevelopment strategies. The availability of parking is a necessary component for all development, including residential, retail, and commercial properties. However, as the availability of land is constrained, it is important to provide a balanced supply of parking to support new and existing developments. The purpose of this parking study is to evaluate existing parking needs and availability and identify strategies to optimize the parking supply to support future growth.

The study area for the Master Plan includes the greater Downtown Livingston area stretching from the BNSF railroad tracks to Sacajawea Park. The study area boundary encompasses the boundaries of the Livingston Urban Renewal Agency (URA), Downtown Historic District, and Central Business Zoning District. The parking study is focused on the area generally bounded by Park Street, 5th Street, Callender Street, 3rd Street, Geyser Street, D Street, Lewis Street, and E Street. A map of the study area is provided in **Figure 2.1**.

2.0. INVENTORY AND ENFORCEMENT

Within the study area, free public on-street parking is available on nearly all streets as shown in **Figure 2.1**. A combination of parallel and angled on-street parking is provided, as shown in the figure. Most of the angled parking is located on the east side of Main Street. Most on-street parking spaces allow parking for up to two hours. The two-hour time limit in the downtown core applies every day of the week between the hours of 9:00 AM and 5:00 PM. Further away from the downtown core, on-street parking is not time-restricted.

Handicap parking spaces are provided periodically throughout the downtown area. Loading zones are provided in some locations but are generally infrequent. The lack of loading zones has frequently resulted in delivery vehicles to park in the middle of a street if on-street parking is otherwise unavailable.



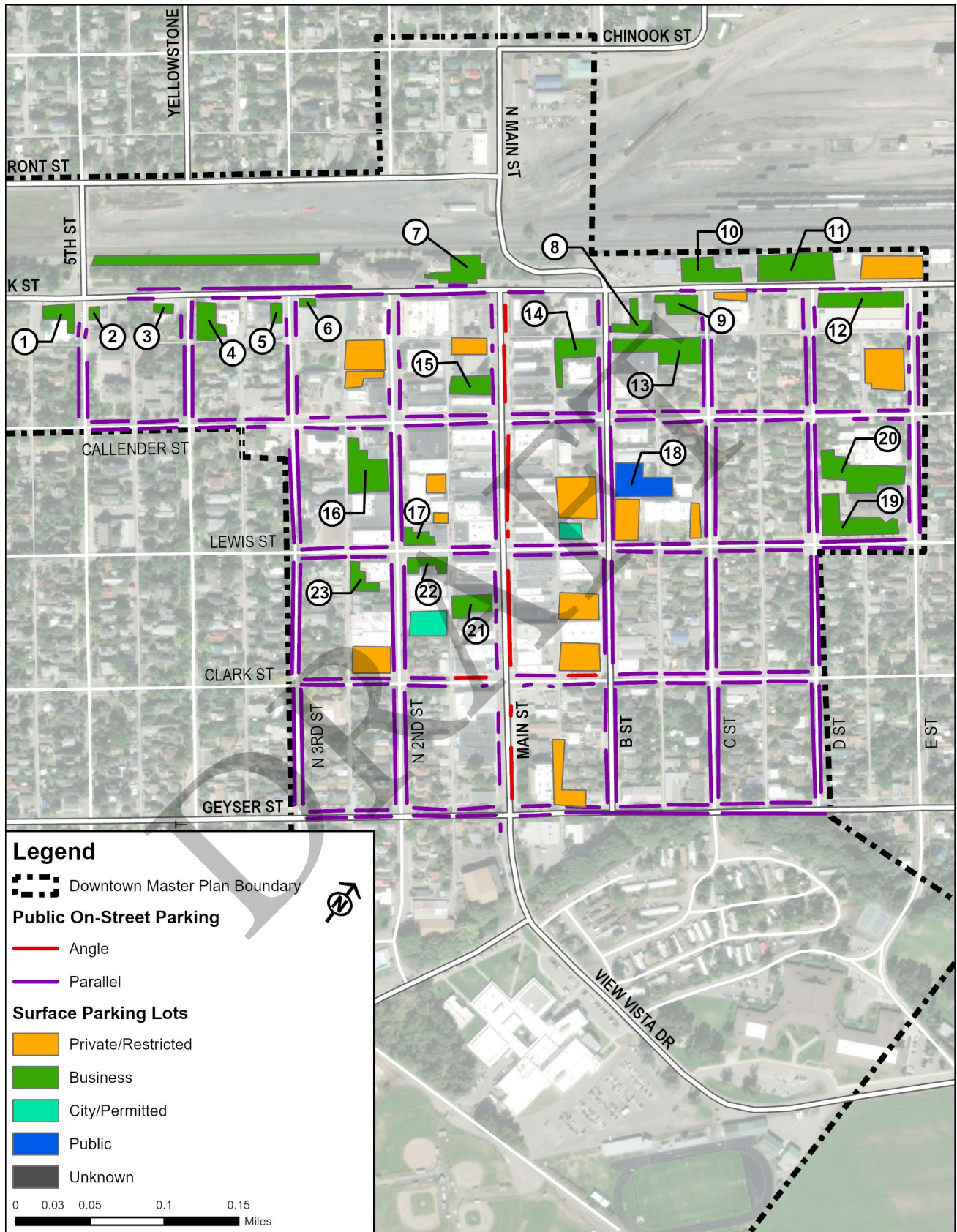


Figure 2.1: Existing Parking Supply

There are also several parking lots provided throughout the downtown area as shown in **Figure 2.1**. The parking lots are categorized based on their availability for public parking. Several businesses own and maintain parking lots for their customers only with restrictions on public parking (shown in orange). Several other businesses have open parking lots, primarily for the use of their customers, but do not have restrictions against public parking (shown in green), although some have one- or two-hour time limits. There is one public parking lot on B Street (shown in blue). Additionally, two downtown lots are managed by the City of Livingston and are open to the public on a permit basis (shown in teal).



American Bank parking lot restrictions.

Figure 2.2 illustrates the available public parking supply within the downtown area. For purposes of this study, only the parking lots which are available for unrestricted public parking (blue and green lots), as labeled in **Figure 2.1**, were included. Parking lot capacities were estimated based on aerial imagery and confirmed during field reviews. Capacities for gravel lots, or lots without defined parking stalls, were estimated based on observed use. On-street parking locations and capacities are also shown in **Figure 2.2**. The capacities were calculated by dividing the parking zone length by an average stall length of 27 feet.

2.1. Enforcement

In 2023, the City of Livingston underwent personnel restructuring and removed the Code Enforcement position from the Police Department. The new position employs two personnel who are responsible for ensuring city code compliance, which includes the 2-hour parking downtown, abandoned vehicles, trailers parked over the time allotment, blight, overgrown weeds, snow removal, along with other city codes. Parking complaints can be submitted by citizens via an online reporting form. The penalties for parking code violations are shown in **Table 2.1**. According to city officials and public feedback received during the outreach effort for the *Livingston Downtown Master Plan*, these changes have helped with parking availability downtown.

Livingston also allows vehicles, such as construction or utility vehicles, wishing to park in a time-restricted space within the central business district for a prolonged period to purchase either a half day or full day parking pass. In October 2023, the Livingston City Commissioners voted unanimously to increase the fee for vehicles from \$10 per day to \$50 for half a day or \$100 for a full day in the downtown two-hour parking zones.¹ The current parking space rental fees are shown in **Table 2.2**. These rates allow vehicles, to park for extended periods in prime parking spots as needed.

Table 2.1: Parking Violation Fines – Dec 2023

Overtime in Time Zone	\$20
Double Parking	\$20
Loading Zone	\$20
Blocking Residence Alley	\$20
Truck Over 16,000 GVW in Residential Area	\$20
Parked Over 72 Hours Not in Running Condition	\$20
Parked on Street Without Current Registration	\$20
No Parking Zone	\$25
Wrong Side of Street	\$20
Blocking Driveway	\$20
Over 18 inches from Curb	\$20
Blocking Crosswalk	\$20
Alley Parking – Fire District	\$25
Parked Within 15 Feet of Fire Hydrant	\$20
Other	
Parked on Sidewalk	\$20
Street Sweeper	\$20
Parked After 11 P.M. in City Park	\$20
Handicap Parking	\$100

Table 2.2: Parking Space Rent – Dec 2023

Two Hour Zone Permit – per Space	\$100/day
2 nd Street Lot	\$30/month
Lewis Street	\$30/month
Late Payment Penalty	\$5

¹ Sean Batura, Livingston Enterprise, Fee increases for on-street, downtown parking, October 6, 2023, https://www.livingstonenterprise.com/news/fee-increases-for-on-street-downtown-parking/article_0a0f0980-63ff-11ee-aa06-33d51032fbf9.html

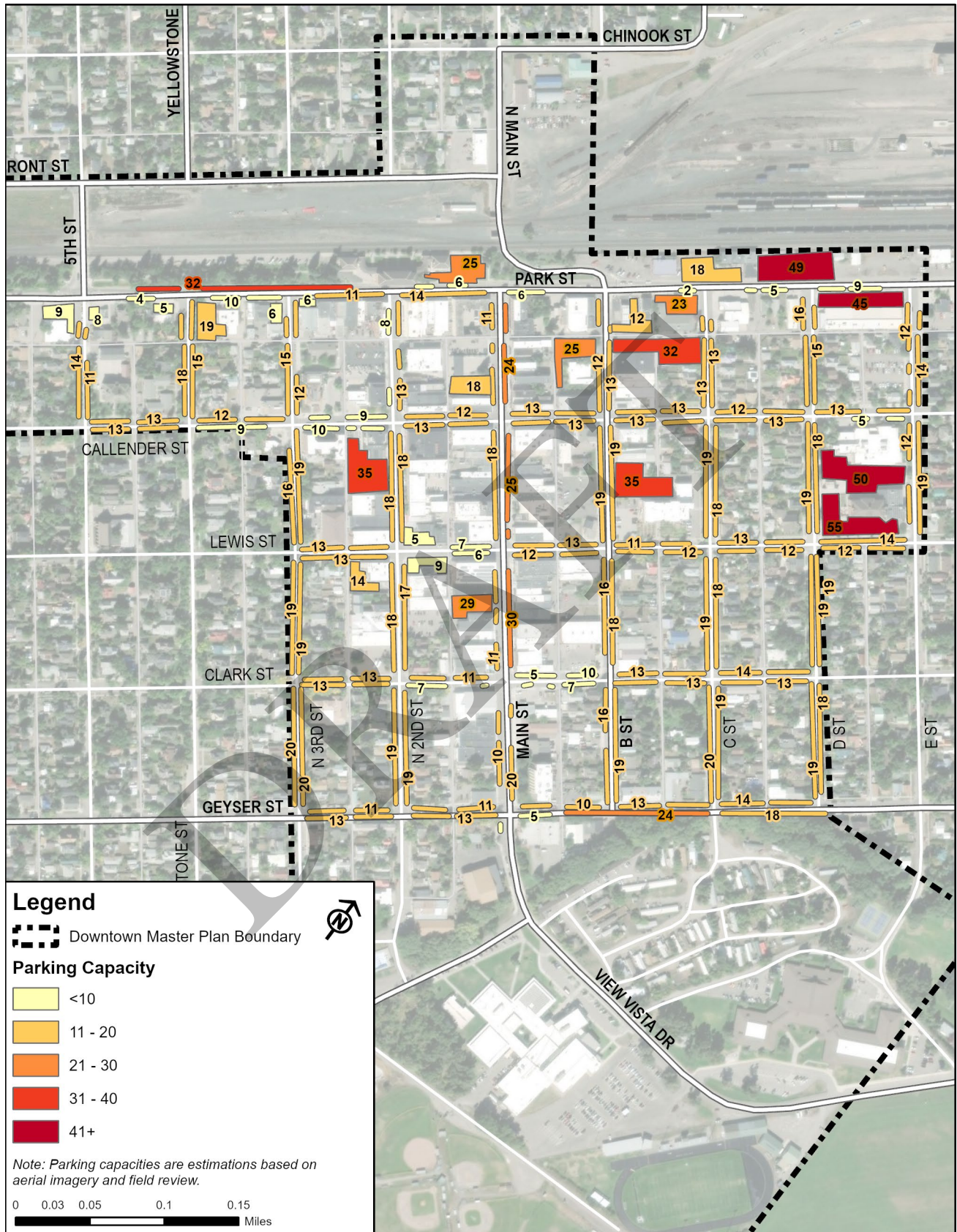


Figure 2.2: Parking Supply Capacity

3.0. UTILIZATION

The parking utilization study was completed over two days in August 2023: Thursday, August 10th, and Friday, August 11th. Data was collected during normal enforcement hours, between 9:00 AM and 5:00 PM. This timeframe was selected to capture the typical parking use during the peak summer season. Activity in Downtown Livingston is heavily influenced by seasonal tourism, so the summer season is typically the busiest time of year. Outside the summer season, parking availability is less constrained.

Appendix A details the 23 public parking lots, their capacities, and the utilization data collected. There are an estimated 530 parking spaces available in these downtown lots. Parking utilization rates were calculated for the average and peak hours. Hourly parking utilization rates represent an average percentage of occupancy observed over the two-day period. The peak utilization rate is the maximum observed during any given period over the two days. It is generally accepted in the parking industry that people typically perceive parking as full once about 90 percent of the spaces are occupied because they are then forced to search for an alternate location from their first choice. Accordingly, time periods where parking utilization was greater than 90 percent are denoted in red in the table.

Appendix B details the on-street parking areas, their capacities, and the utilization data collected. There are an estimated 1,615 parking stalls available in the downtown area. For the utilization study, on-street parking occupancy was inventoried by block with each side of the street being considered a separate parking area. Parking utilization rates were calculated in the same manner as used for parking lot utilization. There were several observed periods where parking utilization on a single street was greater than 90 percent as denoted in red in the appendix. In some cases, the occupancy data exceeded the available parking capacity value, resulting in utilization percentages greater than 100 percent, which may indicate that some motorcycles were counted or that some vehicles were parked illegally.

Figure 3.1 shows the average parking utilization downtown and **Figure 3.2** shows the peak parking utilization. The mapping shows that parking areas closer to the downtown core are typically more highly utilized than those further away. Main Street and the B Street Public Parking Lot have the highest average parking utilization rates. Although many parking areas approach or reach capacity at some point throughout the day, most of the parking areas have an average utilization of less than 75 percent.

As observed in **Appendix A** and **Appendix B**, there were few occasions where parking areas were more than 90 percent utilized, which indicates that most of the time drivers should be able to find parking at or near their desired destination. Only select locations consistently had utilizations near or at capacity, most notably along Main Street between Park and Lewis Streets. The tables also demonstrate relatively small hourly differences in parking utilization rates, which indicates generally consistent turnover and demand. Field observations and stakeholder input indicate that turnover is relatively low and that parking spots are often occupied for the full two-hour time allotment. Since enforcement was increased in 2023, turnover and compliance have been noted to improve.

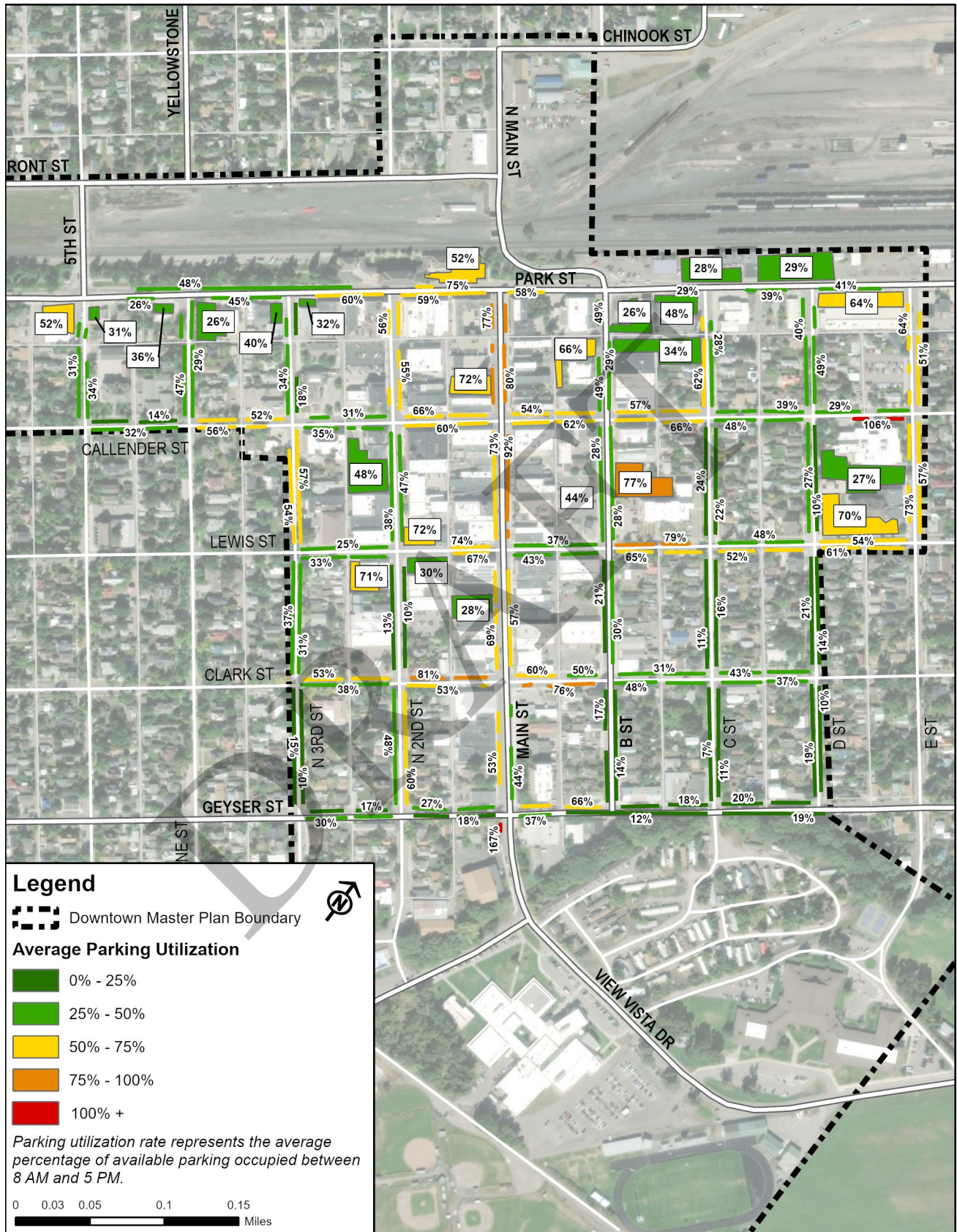


Figure 3.1: Average Parking Utilization

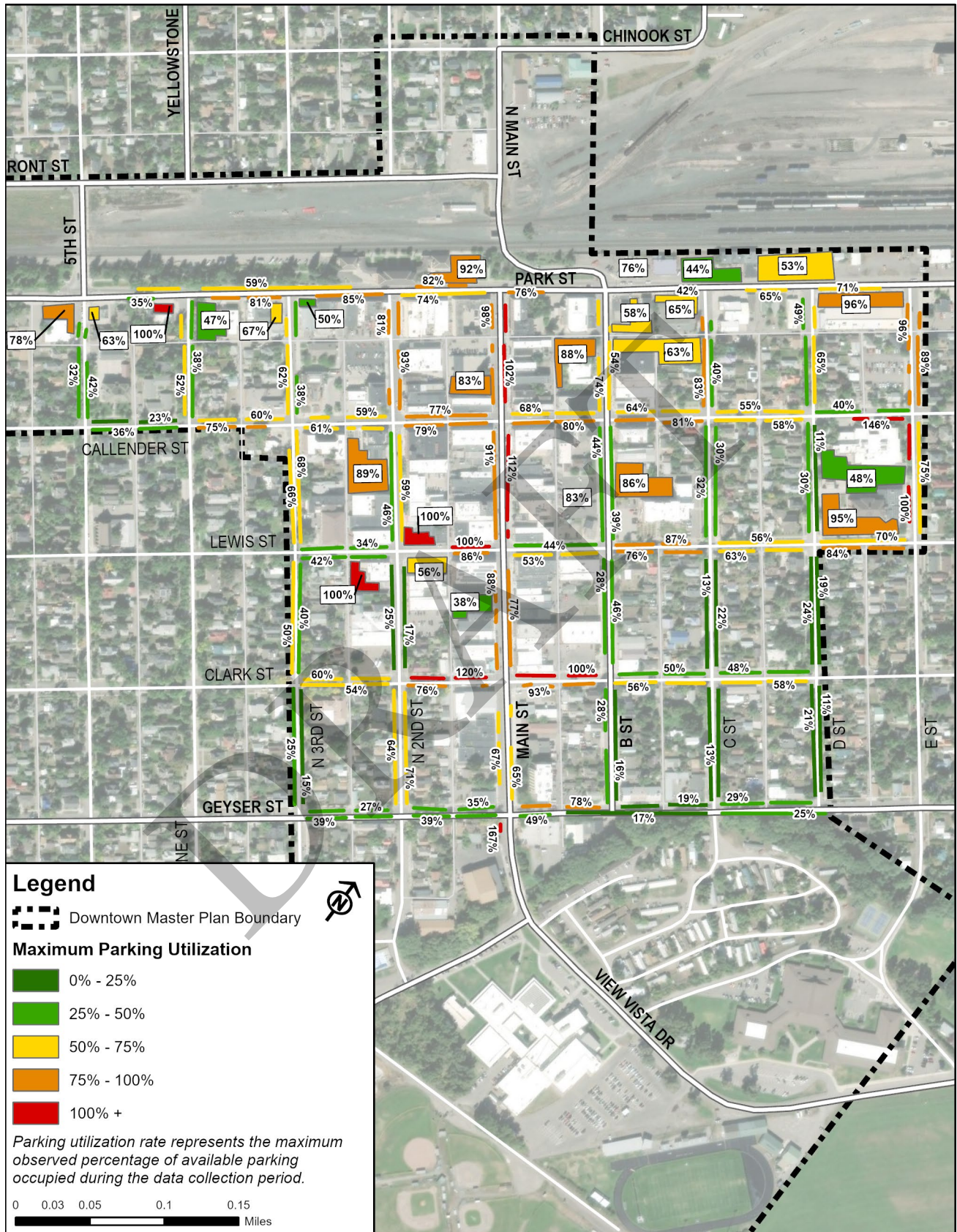


Figure 3.2: Peak Parking Utilization

4.0. ADDITIONAL CONSIDERATIONS

The data collected for this parking study represents the peak summer season. Outside of the summer season, parking utilization is often much lower, and there are fewer issues finding available parking at or near desired destinations. Although this data provides a glimpse into seasonal capacity constraints, parking use during other time periods should be considered.

Additionally, the needs of different user types should be considered. A variety of different users, including downtown residents, employees, hotel guests, restaurant/bar patrons, retail shoppers, and delivery vehicles, need to park downtown. Each user type has different needs in terms of parking duration and location, ranging from a brief 15-minute delivery next to the drop-off location to a day-long stay or more in a secure location for residents and hotel guests.

During the public outreach effort for the Master Plan, several participants also expressed concerns about parking availability for employees of downtown businesses. Employees often choose to park in on-street areas near their places of employment with two-hour time restrictions. To avoid citations, employees must move their vehicles every few hours. Reparking is inefficient for employees, business owners, city staff, and other downtown visitors and undermines the intent of time restriction regulations. The shuffling of cars can also contribute to congestion downtown.

5.0. CONCLUSION AND RECOMMENDATIONS

The data collected for this utilization study indicates that between designated parking lots and on-street parking, there is an ample supply of parking when looking at the entire downtown area. However, some concentrated areas are commonly near capacity, requiring parking to occur a block or two away from desired locations. This is most common with on-street parking in the downtown core, generally bounded by Park Street, 2nd Street, Lewis Street, and B Street, with the highest utilization rates along Main Street.

During public and stakeholder meetings, there was mixed opinion on if additional parking was needed or if improved management strategies would help alleviate the concerns. Some expressed a desire for additional surface parking, or a parking structure, near the downtown core where parking utilization is highest. While data was not collected as part of this study, it was also noted that there are multiple privately owned lots which restrict public use which results in underutilization at key locations.

Given the high cost of adding surface parking, it is likely more feasible to focus on improving the existing system through management and “right-sizing” strategies. The following summarizes potential strategies to consider as part of the *Livingston Downtown Master Plan*.

Varied Time Restrictions

Using time limits to support a parking management program is a trusted industry best practice when used and enforced appropriately. Providing a variety of time limits is a simple, yet effective, way to support parkers with different needs. Shorter time spaces (an hour or less) are most effective in areas with high utilization and quicker turnover. These include drop-off, pickup, and loading zones as well as quick service dining and retail locations. Mid-term parking zones (~2 hours) are most common across downtowns and are typically adequate for the majority of patrons. These zones allow enough time for most retail shopping and dining activities. Long-term parking areas (greater than 2 hours) are needed for certain locations that require longer appointment times, meetings, or special uses. These are typically located on the periphery of the downtown area due to their lower turnover rates. A “right-sized” parking management system incorporates a variety of parking time restrictions to focus on the various needs of downtown users and businesses.

Employee Parking

Business vitality depends on the availability of parking for both patrons and employees. To ensure employees have convenient parking opportunities, the city could implement a permit program with applicable parking options provided in several locations throughout the downtown area. Surface lots that are currently unrestricted or are otherwise currently underutilized could be allocated for the use of employees with proper permits. A successful program would require several locations for permit holders. Permit hours and allocated spaces can be modified depending on program demand and utilization. Assignment of fees for all-day, off-street employee parking permits can help ensure the sustainability of the program and pay for the administrative costs to manage and enforce the program.

City Parking Management

The city manages two off-street parking lots, one on Lewis Street between Main Street and B Street and another on 2nd Street between Lewis Street and Clark Street (denoted in teal on **Figure 2.1**). These lots are managed and controlled by the city through a permit program. Between these two lots, approximately 55 parking stalls are available. These lots are variably utilized and could be leveraged to provide additional permitted employee parking stalls as discussed in the previous section. In general, the city should periodically review permit holders to ensure maximum utilization by local residents.

Additionally, these off-street lots could also be converted to pocket parks or programmable open spaces, as described in the Parks and Open Space Recommendations of the Master Plan. Since the city already controls these lots, it would be easy to re-designate the lots as open space for temporary community events and other short-term use during off-peak seasons.

Pay for Parking

Currently, all downtown parking in Livingston is free to use, except the day-long parking permits shown in **Table 2.2**. Although the city generally desires to avoid paid parking, it can be an effective management strategy to consider in the future. Paid parking offers a range of benefits, including the ability to offer incentive programs, utilize rates that influence driver behavior, and encourage the reduction of single occupancy vehicles or the use of alternate modes of transportation. Additionally, revenues from paid parking can help support parking operations, required staffing, and ongoing maintenance, creating a sustainable parking management strategy. Paid parking combined with time restrictions can be an effective way to help support increased turnover downtown.

APPENDIX A: Parking Lot Utilization

ID	Name	Capacity	THURSDAY (8-10-23)								FRIDAY (8-11-23)							THU/FRI AVERAGE							Average	Peak	
			9:30 AM	10:30 AM	11:30 AM	12:30 PM	1:30 PM	2:30 PM	3:30 PM	4:30 PM	9:30 AM	10:30 AM	11:30 AM	12:30 PM	1:30 PM	2:30 PM	3:30 PM	9:30 AM	10:30 AM	11:30 AM	12:30 PM	1:30 PM	2:30 PM	3:30 PM			4:30 PM
1	Carquest Auto Parts	9	44%	44%	44%	67%	44%	67%	44%	67%	33%	56%	33%	44%	33%	67%	78%	39%	50%	39%	56%	39%	67%	61%	67%	52%	78%
2	Livingston Laundromat	8	13%	25%	13%	25%	13%	63%	38%	25%	38%	25%	38%	63%	13%	13%	50%	25%	25%	25%	44%	13%	38%	44%	25%	30%	63%
3	Thiry Chiropractic	5	40%	40%	20%	60%	40%	40%	40%	40%	20%	20%	0%	100%	0%	0%	40%	30%	30%	10%	80%	20%	20%	40%	40%	34%	100%
4	Wells Fargo Bank	19	21%	21%	21%	37%	26%	32%	42%	26%	26%	47%	11%	0%	16%	26%	21%	24%	34%	16%	18%	21%	29%	32%	26%	25%	47%
5	Eyecare Professionals	6	50%	50%	33%	33%	67%	33%	33%	17%	0%	50%	17%	33%	50%	67%	50%	25%	50%	25%	33%	58%	50%	42%	17%	38%	67%
6	Rice Fine Thai Cuisine	6	33%	50%	33%	33%	50%	50%	50%	33%	17%	17%	17%	0%	33%	17%	0%	25%	33%	25%	17%	42%	33%	25%	33%	29%	50%
7	Northern Pacific Beanery	25	80%	68%	80%	80%	32%	20%	4%	12%	76%	92%	52%	80%	32%	44%	12%	78%	80%	66%	80%	32%	32%	8%	12%	49%	92%
8	T J's Gas N Convenience	12	58%	17%	8%	17%	25%	8%	33%	25%	25%	0%	25%	58%	25%	8%	25%	42%	8%	17%	38%	25%	8%	29%	25%	24%	58%
9	City Hall	23	48%	39%	30%	43%	65%	65%	48%	39%	52%	48%	57%	43%	43%	39%	39%	50%	43%	43%	43%	54%	52%	43%	39%	46%	65%
10	Chamber of Commerce/Visitor Center	18	33%	22%	39%	33%	44%	22%	17%	17%	17%	22%	33%	44%	33%	22%	11%	25%	22%	36%	39%	39%	22%	14%	17%	27%	44%
11	Rib & Chop House	49	8%	16%	29%	39%	16%	31%	33%	18%	16%	22%	12%	43%	53%	41%	12%	19%	20%	41%	35%	42%	37%	18%	28%	53%	
12	Strip Mall	45	42%	67%	67%	69%	96%	67%	84%	67%	51%	53%	60%	60%	60%	7%	78%	47%	60%	63%	64%	78%	37%	81%	67%	62%	96%
13	Thriftway/Strip Mall	32	63%	25%	22%	34%	28%	31%	22%	34%	31%	31%	28%	31%	28%	31%	38%	47%	28%	25%	33%	28%	31%	30%	34%	32%	63%
14	Sky Federal Credit Union	25	68%	56%	76%	76%	64%	64%	60%	72%	16%	60%	72%	72%	68%	72%	88%	42%	58%	74%	74%	66%	68%	74%	72%	66%	88%
15	The 1900	18	94%	94%	83%	78%	72%	89%	89%	67%	72%	67%	61%	50%	56%	61%	61%	83%	81%	72%	64%	64%	75%	75%	67%	73%	94%
16	First Interstate Bank	35	49%	46%	31%	43%	37%	49%	57%	60%	89%	31%	40%	43%	34%	57%	46%	69%	39%	36%	43%	36%	53%	51%	60%	48%	89%
17	Key Insurance	5	80%	60%	100%	100%	80%	80%	60%	100%	80%	60%	40%	40%	40%	60%	60%	80%	60%	70%	70%	60%	70%	60%	100%	71%	100%
18	B Street Public Parking	35	77%	77%	86%	86%	83%	80%	80%	51%	74%	77%	74%	77%	71%	71%	71%	76%	77%	80%	81%	77%	76%	76%	51%	74%	86%
19	Shane Center	55	85%	82%	95%	58%	67%	64%	65%	56%	67%	65%	69%	64%	56%	71%	60%	76%	74%	82%	61%	62%	67%	63%	56%	68%	95%
20	City/County Buildings	50	48%	24%	28%	18%	20%	20%	32%	18%	34%	26%	12%	30%	20%	32%	18%	41%	25%	20%	24%	20%	26%	25%	18%	25%	48%
21	O'Reilly Auto Parts/Unwined Bar	29	28%	21%	24%	28%	38%	21%	21%	34%	34%	34%	17%	31%	24%	38%	21%	31%	28%	21%	29%	31%	29%	21%	34%	28%	38%
22	Unoccupied	9	33%	33%	33%	44%	44%	22%	56%	22%	11%	22%	0%	44%	22%	11%	22%	22%	28%	17%	44%	33%	17%	39%	22%	28%	56%
23	Food Pantry	14	57%	57%	100%	71%	79%	57%	86%	86%	43%	64%	57%	71%	86%	71%	57%	50%	61%	79%	71%	82%	64%	71%	86%	71%	100%

DRAFT

APPENDIX B: On-Street Parking Utilization

ID	Street	To - From	Side	Capacity	THURSDAY (8-10-23)								FRIDAY (8-11-23)								THU/FRI AVERAGE								Average	Peak
					9:30 AM	10:30 AM	11:30 AM	12:30 PM	1:30 PM	2:30 PM	3:30 PM	4:30 PM	9:30 AM	10:30 AM	11:30 AM	12:30 PM	1:30 PM	2:30 PM	3:30 PM	9:30 AM	10:30 AM	11:30 AM	12:30 PM	1:30 PM	2:30 PM	3:30 PM	4:30 PM			
74	Clark St	C - D	N	14	44%	30%	0%	44%	52%	52%	52%	44%	44%	44%	37%	37%	30%	37%	44%	37%	22%	41%	44%	41%	44%	44%	43%	52%		
75	C St	Lewis - Clark	W	19	0%	0%	0%	0%	0%	0%	5%	5%	5%	16%	16%	16%	21%	11%	8%	8%	8%	11%	5%	8%	13%	5%	14%	21%		
76	C St	Lewis - Clark	E	18	0%	0%	0%	0%	11%	11%	5%	5%	22%	22%	22%	22%	16%	27%	33%	11%	11%	14%	19%	19%	5%	19%	33%			
77	Clark St	B - C	S	13	37%	45%	60%	60%	60%	52%	52%	15%	52%	45%	52%	45%	37%	45%	45%	45%	56%	56%	52%	45%	49%	15%	51%	60%		
78	Clark St	B - C	N	13	15%	23%	38%	15%	23%	15%	8%	8%	38%	38%	61%	46%	46%	31%	27%	31%	50%	31%	34%	31%	19%	8%	34%	61%		
79	B St	Lewis - Clark	E	18	34%	29%	46%	51%	23%	23%	34%	23%	17%	17%	40%	34%	23%	34%	26%	23%	31%	46%	29%	23%	34%	23%	34%	51%		
80	B St	Lewis - Clark	W	16	38%	38%	25%	31%	38%	25%	25%	19%	13%	13%	13%	13%	19%	13%	6%	25%	25%	19%	22%	28%	19%	16%	19%	27%	38%	
81	Clark St	Main - B	N	11	86%	76%	76%	76%	76%	95%	95%	86%	67%	76%	86%	86%	95%	76%	95%	76%	76%	81%	81%	86%	86%	95%	86%	84%	95%	
82	Clark St	Main - B	S	7	100%	114%	100%	100%	86%	100%	86%	71%	57%	71%	71%	57%	29%	57%	71%	86%	93%	79%	64%	71%	79%	71%	57%	78%	114%	
83	Main St	Lewis - Clark	E	30	23%	40%	57%	67%	70%	53%	60%	50%	40%	43%	63%	83%	83%	73%	43%	32%	42%	60%	75%	77%	63%	52%	50%	59%	83%	
84	Main St	Lewis - Clark	W	11	62%	71%	80%	80%	80%	71%	80%	62%	27%	44%	71%	71%	97%	71%	44%	58%	75%	75%	75%	84%	75%	62%	71%	97%		
85	Clark St	2nd - Main	N	11	46%	56%	102%	93%	120%	37%	74%	102%	65%	28%	93%	120%	111%	37%	111%	56%	42%	97%	106%	116%	37%	93%	102%	81%	120%	
86	Clark St	2nd - Main	S	7	42%	56%	56%	42%	42%	56%	56%	28%	42%	42%	56%	56%	42%	97%	56%	42%	49%	56%	56%	42%	76%	56%	28%	55%	97%	
87	2nd St	Lewis - Clark	E	17	17%	0%	11%	6%	11%	6%	17%	11%	17%	6%	6%	6%	6%	11%	11%	17%	3%	9%	6%	9%	9%	14%	11%	15%	17%	
88	2nd St	Lewis - Clark	W	18	33%	0%	28%	0%	6%	22%	17%	6%	17%	6%	6%	6%	6%	17%	25%	8%	17%	3%	6%	14%	17%	6%	18%	33%		
89	Clark St	3rd - 2nd	S	13	15%	31%	31%	46%	54%	62%	54%	46%	23%	23%	38%	46%	46%	31%	19%	27%	35%	46%	50%	46%	42%	46%	42%	62%		
90	Clark St	3rd - 2nd	N	13	48%	56%	63%	48%	56%	56%	63%	48%	56%	48%	56%	56%	48%	48%	52%	52%	60%	52%	52%	52%	56%	48%	56%	63%		
91	3rd St	Lewis - Clark	E	19	32%	27%	38%	43%	32%	22%	16%	22%	38%	27%	32%	38%	38%	27%	22%	35%	27%	35%	40%	35%	24%	19%	22%	34%	43%	
92	3rd St	Lewis - Clark	W	19	53%	48%	37%	48%	42%	37%	37%	21%	32%	48%	32%	37%	26%	37%	16%	42%	48%	34%	42%	34%	37%	26%	21%	41%	53%	
93	3rd St	Clark - Geyser	W	20	0%	0%	0%	0%	0%	5%	5%	10%	10%	10%	20%	25%	20%	10%	5%	5%	10%	13%	13%	13%	8%	5%	14%	25%		
94	3rd St	Clark - Geyser	E	20	0%	0%	0%	0%	0%	5%	5%	15%	10%	15%	15%	35%	25%	25%	20%	5%	8%	8%	18%	13%	15%	13%	15%	17%	35%	
95	Geyser St	3rd - 2nd	N	11	27%	9%	9%	35%	18%	9%	9%	18%	18%	18%	18%	18%	18%	18%	22%	13%	13%	27%	18%	13%	13%	9%	22%	35%		
96	Geyser St	3rd - 2nd	S	13	23%	23%	23%	39%	39%	23%	31%	31%	39%	23%	31%	31%	31%	31%	27%	27%	31%	31%	31%	35%	27%	31%	23%	34%	39%	
97	2nd St	Clark - Geyser	W	19	57%	52%	46%	46%	41%	46%	67%	52%	46%	41%	41%	41%	41%	62%	52%	46%	46%	44%	41%	44%	64%	52%	52%	67%		
98	2nd St	Clark - Geyser	E	19	58%	53%	53%	74%	53%	47%	58%	53%	68%	63%	58%	63%	68%	63%	63%	55%	66%	58%	58%	61%	53%	62%	74%			
99	Geyser St	2nd - Main	N	11	35%	35%	27%	27%	27%	35%	35%	44%	18%	18%	18%	18%	18%	27%	27%	27%	27%	22%	22%	22%	31%	31%	44%	32%	44%	
100	Geyser St	2nd - Main	S	13	16%	16%	23%	16%	8%	8%	23%	39%	16%	8%	8%	16%	23%	39%	16%	12%	16%	12%	12%	16%	31%	39%	23%	39%		
101	Main St	Clark - Geyser	W	10	77%	67%	48%	48%	29%	77%	77%	48%	58%	48%	48%	48%	38%	38%	67%	58%	48%	48%	34%	58%	58%	48%	56%	77%		
102	Main St	Clark - Geyser	W	1	250%	250%	167%	250%	250%	250%	250%	250%	83%	83%	83%	83%	83%	83%	167%	167%	125%	167%	167%	167%	167%	250%	163%	250%		
103	Main St	Clark - Geyser	E	20	55%	60%	15%	35%	25%	55%	60%	80%	50%	50%	40%	30%	40%	25%	53%	55%	28%	38%	28%	48%	43%	80%	48%	80%		
104	Geyser St	Main - B	N	10	59%	59%	59%	59%	59%	69%	78%	78%	69%	69%	69%	69%	69%	69%	69%	64%	59%	59%	64%	69%	69%	78%	68%	78%		
105	Geyser St	Main - B	S	5	20%	39%	20%	20%	20%	39%	39%	59%	39%	39%	39%	39%	39%	39%	39%	39%	29%	29%	29%	29%	49%	39%	41%	59%		
106	Geyser St	Main - B	S	24	12%	12%	17%	12%	25%	25%	21%	29%	0%	4%	4%	4%	4%	4%	4%	6%	8%	10%	8%	14%	14%	12%	29%	17%	29%	
107	B St	Clark - Geyser	W	16	6%	6%	0%	0%	0%	6%	0%	19%	0%	38%	38%	31%	19%	13%	25%	3%	22%	19%	16%	9%	9%	13%	19%	19%	38%	
108	B St	Clark - Geyser	E	19	5%	5%	0%	0%	0%	5%	0%	11%	21%	21%	21%	21%	21%	16%	21%	13%	13%	11%	11%	11%	11%	11%	17%	21%		
109	Geyser St	B - C	N	13	22%	22%	22%	22%	22%	22%	22%	15%	15%	15%	15%	15%	15%	15%	7%	19%	19%	19%	19%	19%	15%	15%	23%	22%		
110	C St	Clark - Geyser	W	20	5%	0%	0%	0%	0%	5%	0%	10%	15%	10%	5%	5%	5%	5%	10%	5%	3%	3%	3%	3%	5%	3%	10%	11%	15%	
111	C St	Clark - Geyser	E	19	5%	0%	0%	0%	0%	5%	5%	22%	11%	11%	11%	11%	16%	16%	8%	5%	5%	5%	8%	11%	11%	22%	14%	22%		
112	Geyser St	C - D	N	14	29%	29%	0%	0%	29%	14%	7%	7%	22%	14%	14%	29%	22%	22%	25%	22%	22%	14%	25%	18%	14%	7%	22%	29%		
113	Geyser St	C - D	S	18	45%	40%	23%	11%	40%	40%	34%	28%	0%	6%	6%	6%	6%	6%	23%	23%	14%	8%	23%	23%	20%	28%	25%	45%		
114	D St	Clark - Geyser	W	19	0%	0%	0%	5%	0%	0%	0%	0%	0%	0%	31%	31%	36%	31%	31%	36%	16%	16%	18%	18%	16%	18%	0%	21%	36%	
115	D St	Clark - Geyser	E	18	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	22%	22%	16%	16%	16%	22%	16%	11%	8%	8%	11%	8%	0%	14%	22%	