



September 16, 2025

TO: Interested Parties
FROM: Betsy App, PhD, [Embold Research](#)
RE: Bozeman Housing & Affordability Poll Results

A new poll¹ by Embold Research shows a widespread belief that there is a major shortage of affordable and available housing options in Bozeman, and many have considered moving away because of it. Bozeman voters support new sources of funding to create more new affordable housing, opposition outweighs support for the Bozeman Water Adequacy for Residential Development ballot initiative, and voters are in alignment with the current direction of the City Commission on the Unified Development Code update.

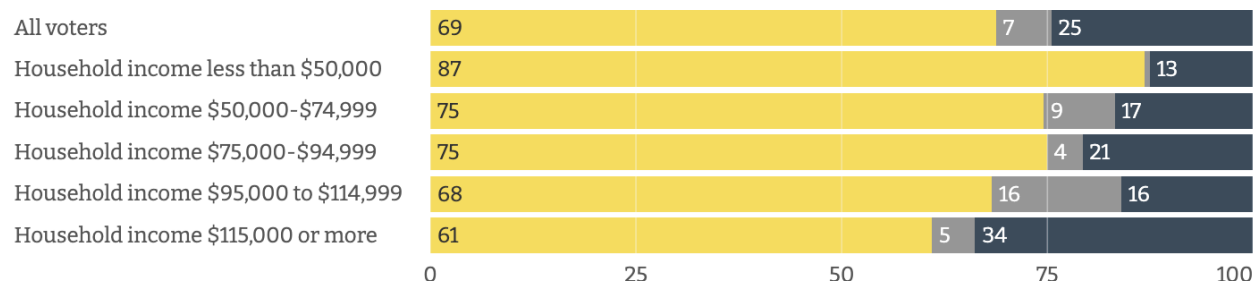
Voters say there are not enough housing options in Bozeman

Overwhelmingly, Bozemanites believe there are not enough housing options to meet all residents' needs. More than two-thirds (69%) say Bozeman does not have enough options, while just one-quarter (25%) say the existing options are sufficient. This belief exists among a majority of Bozemanites across income levels. (The median household income in Bozeman is [\\$79,903](#).) Middle- and working-class voters are especially likely to believe there are not enough housing options.

Perceptions of housing options across income levels EMBOLD research

Q: Generally speaking, do you think Bozeman has enough housing options to meet the needs of Bozemanites across family sizes and income levels, or not enough?

● Not enough ● Not sure ● Enough



Bozemanites are seeing and feeling the impact of the city's shortage of affordable housing options.

Three-quarters (77%) say they or someone they know have been affected: 39% say they have personally been impacted by a shortage of affordable housing options in Bozeman, and another 39% say a friend or family member has been impacted. **Half (51%) say the availability of housing they can**

¹Polling was conducted online from September 4-8, 2025. Using Dynamic Online Sampling to attain a representative sample, Embold polled 424 registered voters in Bozeman. Post-stratification was performed on age, gender, race/ethnicity, education, region, and 2024 presidential results. You can see a full methodology statement, question text and results [here](#).

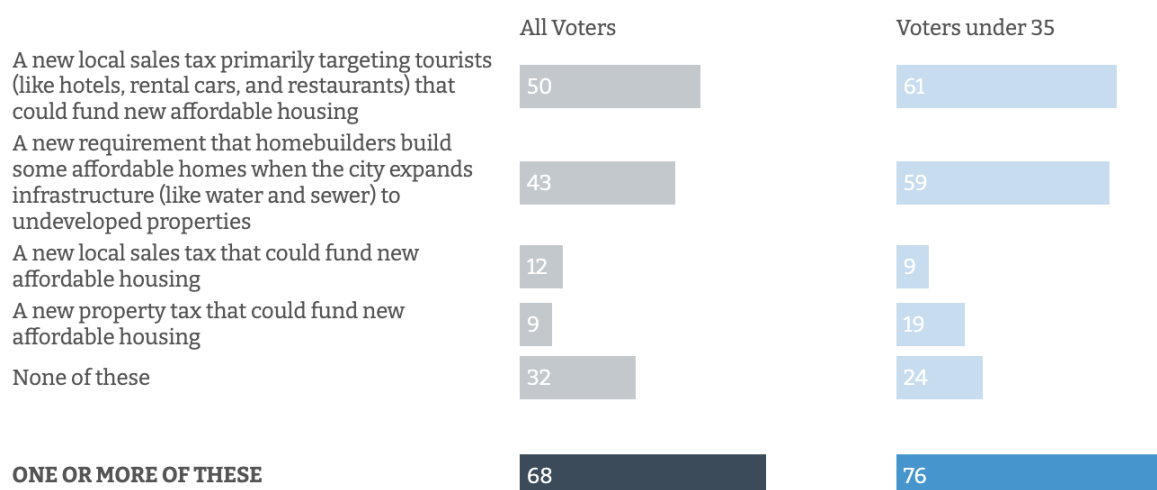
afford makes it difficult for them to envision a long-term future in Bozeman, including 68% of Bozemanites under age 35.

Bozeman voters support policies that that make it easier to build more new affordable homes

Many voters support new policies that would make it easier to build more new affordable homes in an effort to address what they see as a major shortage of affordable housing options. Half (49%) support the general idea of creating a new source of funding to create more new affordable housing (37% oppose), and more than two-thirds (68%) support at least one of four new funding sources, with the most popular being a new local sales tax that would primarily impact tourists.

Support for Funding Sources for New Affordable Homes EMBOLD research

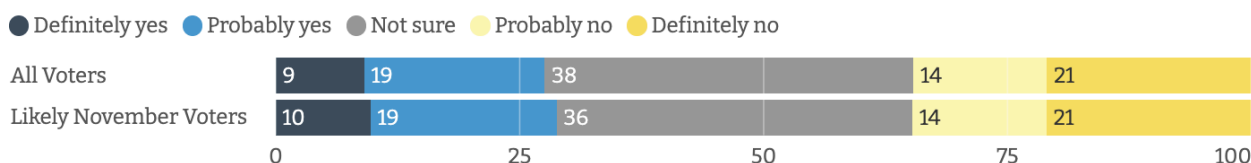
Q. Which of the following would you support? Select all that apply.



On balance, more voters oppose than support the Water Adequacy for Residential Development (WARD) Initiative. Just over one-quarter (28%) of registered voters say they would vote yes if the election were held today, while 35% would vote no. The plurality is undecided.

Support for WARD Initiative EMBOLD research

Q: There is a citizen led initiative on the November ballot connecting water rights to housing affordability. The initiative reads as follows: The Bozeman Water Adequacy Initiative amends 38.410.130.D of the Bozeman Municipal Code to allow development to pay cash-in-lieu of water rights only if the development provides 33% or more of the dwelling units as restricted by deed for 99 years or as long as the law allows and sold at 120% or less of area median income or rented at 60% or less of area median income. This applies to all residential development of three units or more. The initiative also repeals the ability of residential development to satisfy its water adequacy requirements by implementing offsite water efficiency or conservation measures. If the election were held today, would you vote yes or no on this measure?



Bozeman voters are largely aligned with the current direction of the City Commission on the Unified Development Code Update.

On most questions related to the Unified Development Code update, voters expressed alignment with the current direction of the City Commission as of its most recent meeting ([Aug 26th, 2025](#)).

Many voters want the Commission to go even further when it comes to making it easier to build more homes, though this is the minority opinion when compared to where the plurality of voters stand.

- 66% of registered voters support policies to allow and encourage restaurants, coffee shops, and pubs within walking distance of their neighborhoods.
- 52% of registered voters support allowing at least 8 homes and 3 stories per lot in areas that currently allow small apartments, as currently proposed, while 36% support allowing at least 12 homes or no limit on the number of homes with a 3-story cap. 48% oppose all versions of this policy.
- 49% of registered voters prefer allowing 3 homes per lot in all residential zones, as currently proposed, while 32% prefer allowing 4 homes per lot under certain conditions. 18% are not sure.

Opinions on housing solutions differ as a function of annual household income, with those earning less than \$75,000 dramatically more supportive of allowing more abundant housing options than those earning \$75,000 or more.

- A plurality of voters earning less than \$75,000 a year support allowing four homes per lot (43% support, 34% oppose) while the reverse is true among more higher-income households—more higher-income Bozemanites oppose than support allowing more than three (25% support, 56% oppose).
- Two-thirds (66%) of voters earning less than \$75,000 say the availability of housing they can afford has made it difficult to envision a long-term future in Bozeman, while a majority (55%) of more affluent voters do not.
- 60% of voters earning less than \$75,000 support giving density, height, or design flexibility bonuses for nonprofit-developed below-market housing while 56% of voters earning more than \$75,000 oppose doing so.
- Though all voters see a shortage of housing options in Bozeman, a much higher share of less affluent voters do (net +64) than more affluent voters (net +38).