

Flathead County

June 2023 Report



ZARTICO



Objective

Gain insights into what could be influencing the perception that visitation is declining to Flathead County.

*Date: April 1 – May 14, 2023
compared to the same time the
previous year*



Trends in Flathead County

1

Increases in ADR continue to drive up hotel revenue – concealing decreases in supply and demand

2

Movement trends have changed, shifting back towards outdoor recreation and away from retail, sit-down restaurants and bars

3

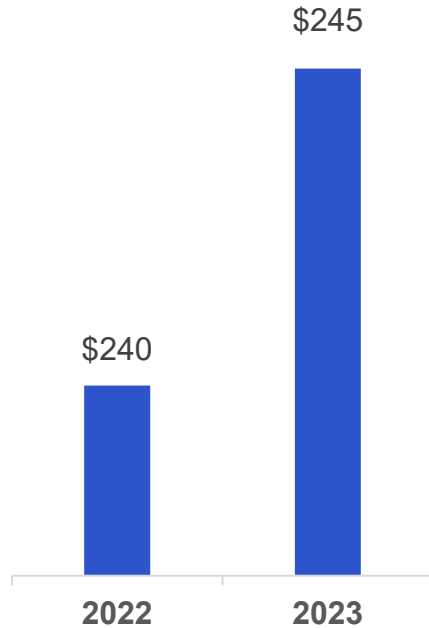
Resident spend is down, potentially escalating the feedback that retail and bars are less busy



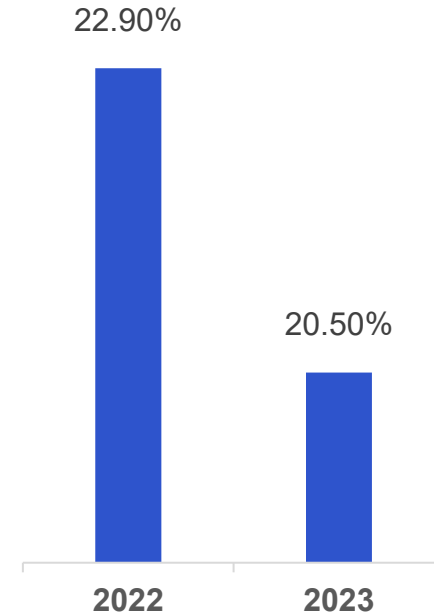
RISING ADR HIDES DECREASE IN SUPPLY AND DEMAND



+2% in Airbnb Rental ADR

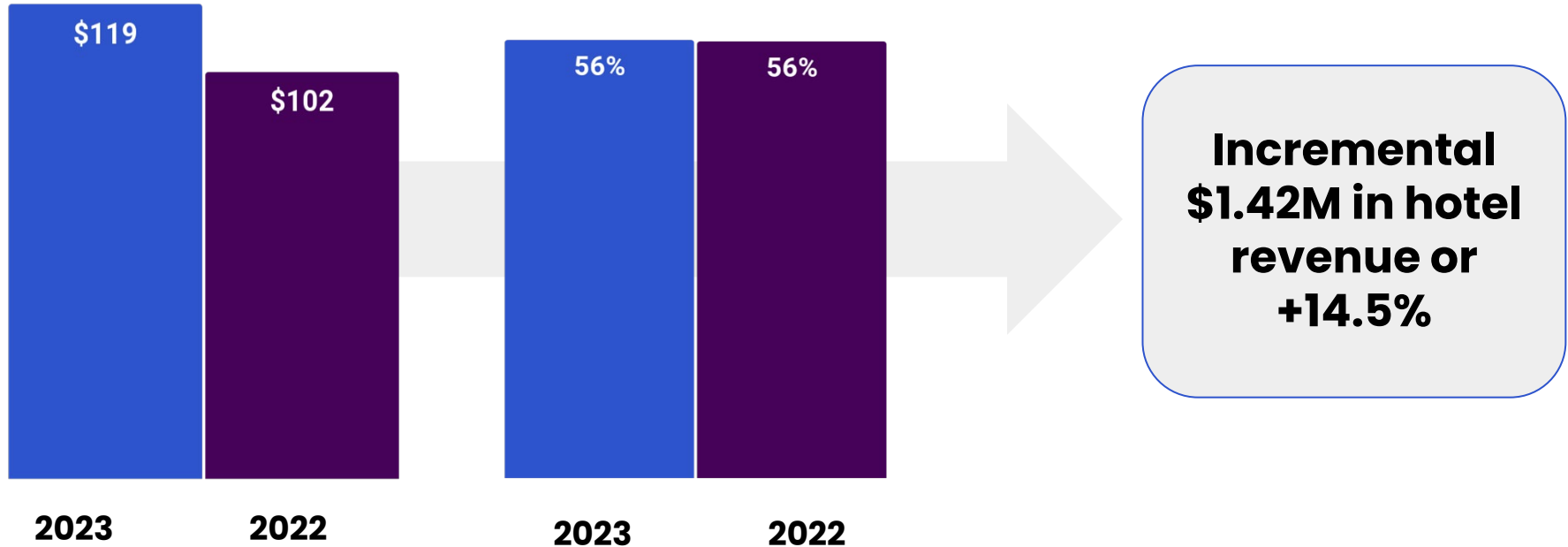


-10% Airbnb Rental Occupancy



**+16.5% in Hotel
ADR**

**Flat Hotel
Occupancy**



The Increase in Revenue Hides the Decrease in Both Available and Booked Room Nights

DEMAND



-1.7%

*Approx. Decrease of 37
Rooms a Night*

SUPPLY



-2.0%

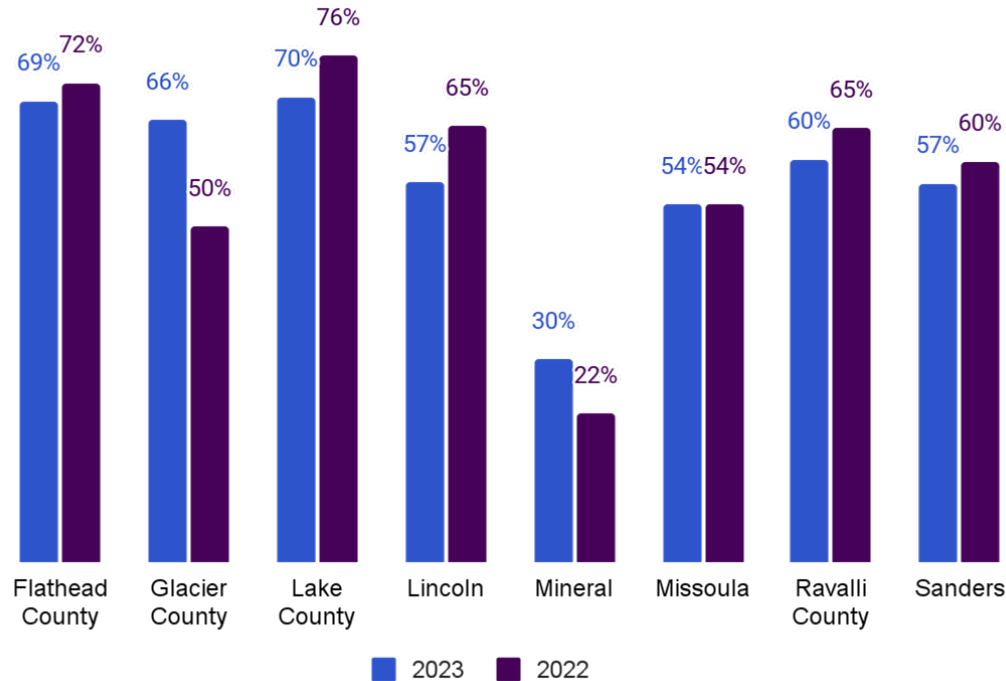
*Approx. Decrease of 75
Rooms a Night*



2

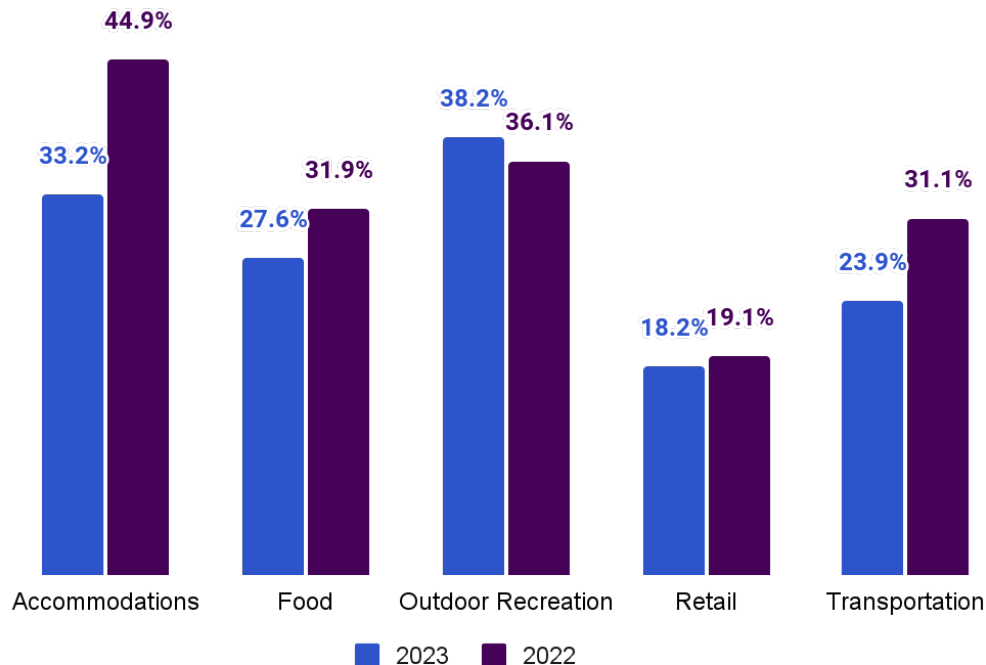
NEW YEAR; NEW TRENDS

Overnight Visitation is Down; Flathead County Is Pacing Ahead of Others in Glacier Country



SOURCE: Near, 4/1/23 – 5/14/23 compared to the same time in 2022

Outdoor Recreation Visitation is Up; Other Categories Down



POIs With More Visitation

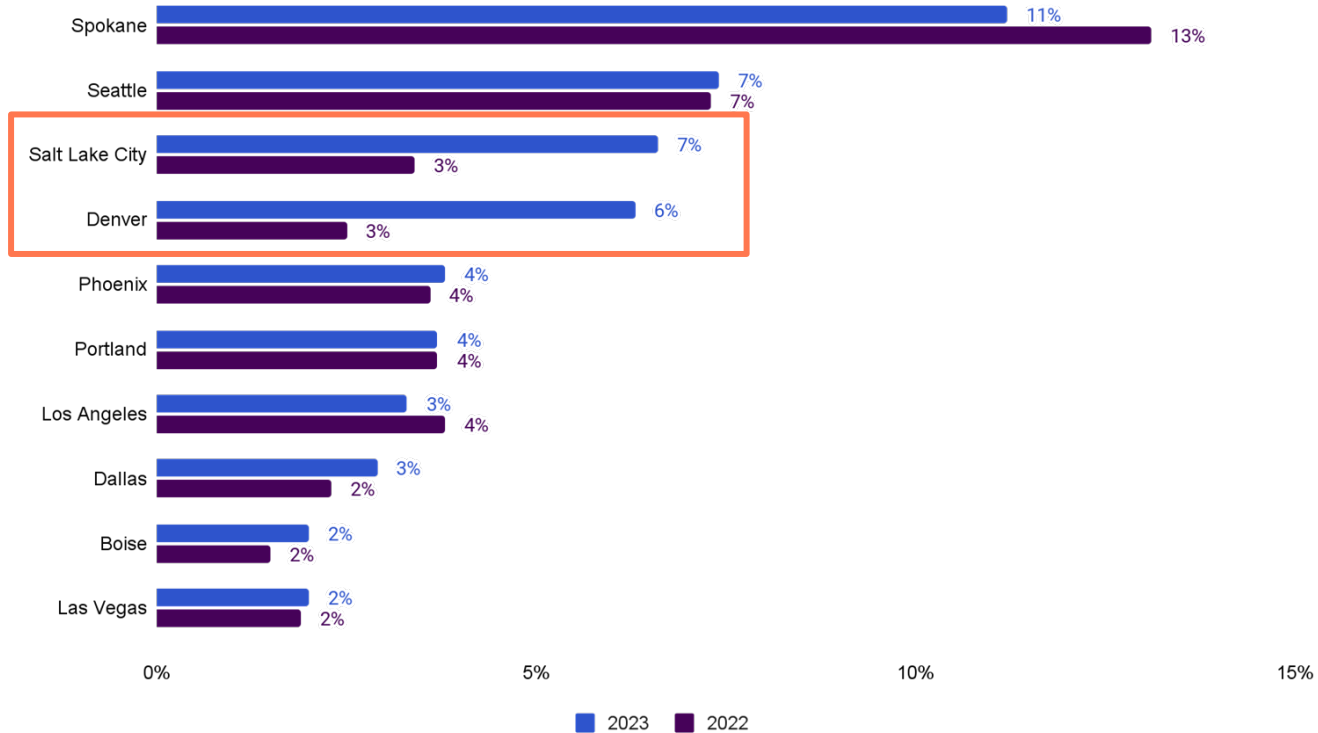
Costco
Glacier National Park
West Glacier KOA
Super 1 Foods

POIs With Less Visitation

Walmart
Whitefish Mountain Resort
Kalispell Center Mall
Tamarack Brewing

POI = Points of Interest

Salt Lake City and Denver Visitation Has Rebounded



SOURCE: Near, 4/1/23 -5/14/23 compared to the same time in 2022

Increase in Visitation From Salt Lake May Have Impacted Restaurant Spend

	Avg. Visitor Spend	% Spend Restaurants	% Spend Fast Food	% Spend Retail	% Spend Gas
Out-of-State Visitor	\$228	14.3%	18.1%	18.1%	11.3%
Spokane Visitor	\$174	13.8%	5.9%	24.5%	16.1%
Salt Lake City Visitor	\$64	10.4%	37.8%	14.2%	15.1%
Denver Visitor	\$211	16.1%	6.3%	25.5%	10.6%

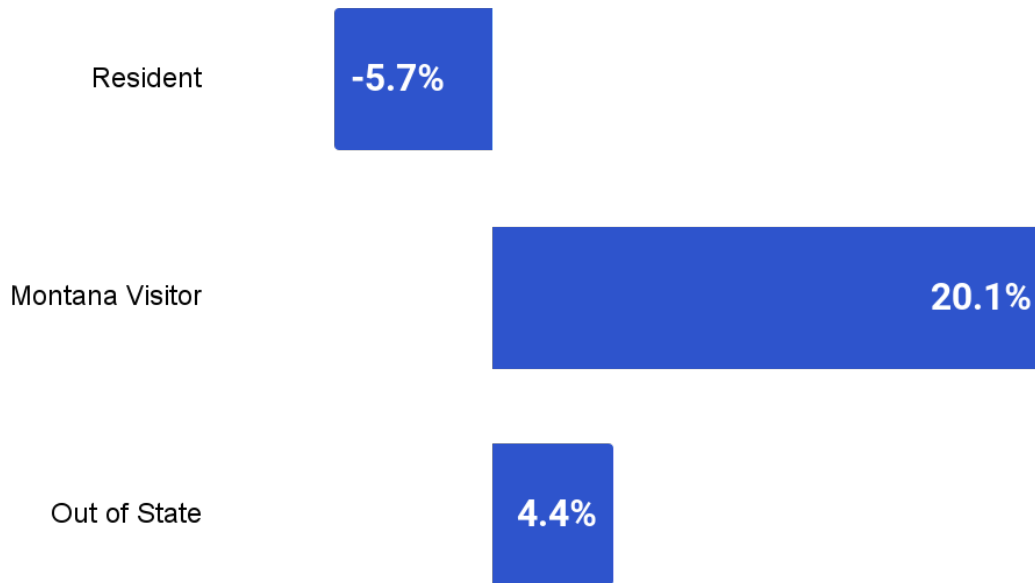


3

**LESS SPEND
FROM LOCALS**

Visitor Spend is Up; Resident Spend is Down

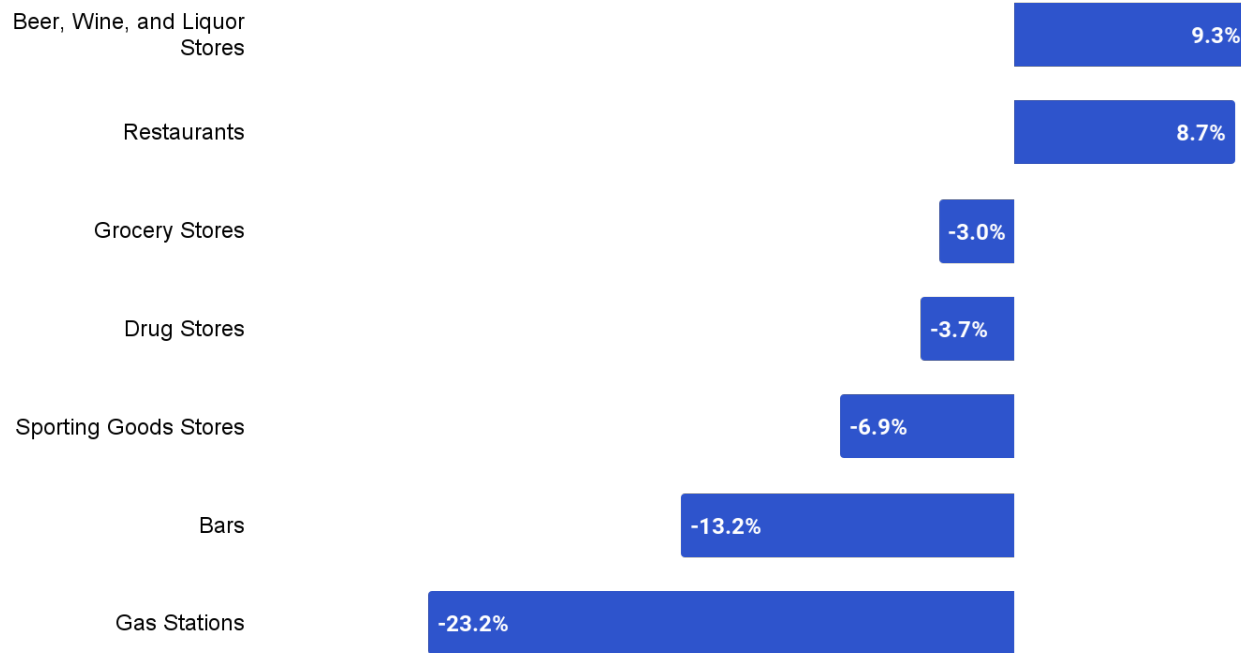
Change in Spend Year-over-Year



SOURCE: Affinity, 4/1/23 – 5/14/23 compared to the same time in 2022

Not All Categories Are Impacted The Same

Change in Spend Year-over-Year

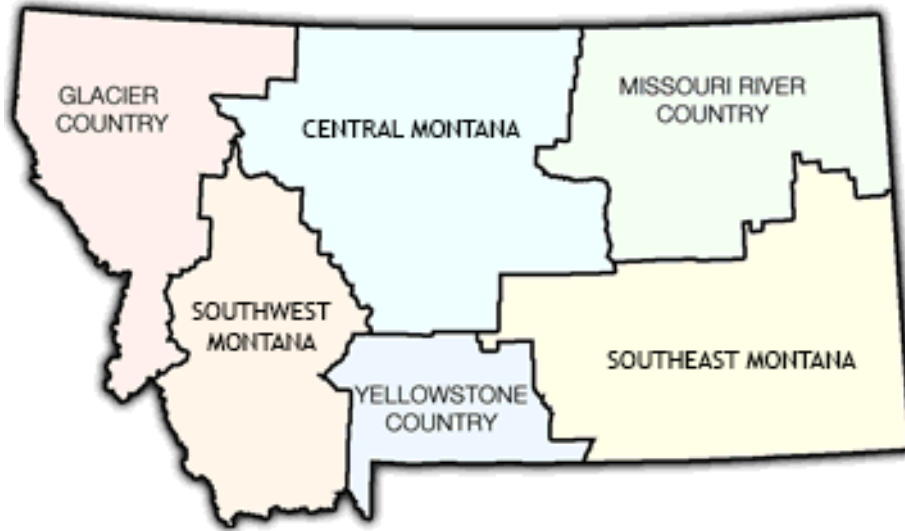


Bars could be feeling extra pressure right now, as resident spend has shifted to wine & beer stores

Gas is down due to lower prices compared to 2022

THANK YOU!

Visitor Definition



Zartico defines a visitor as someone who has:

- Have a common evening location **outside** of the 8 counties in **Glacier Country**
- Stayed for more than **two hours** in your destination
- Visited at least **one place of impact**

There is no time minimum that a person must stay at a POI to be counted a visitor, but they must meet all three criteria to be counted.

