

Ocala/MARION COUNTY VCB

Economic Impact Study &
Visitor Tracking Report
Jul-Sep 2025



STUDY OBJECTIVES: VISITOR JOURNEY



METHODOLOGY



Data Collection:

From July 1, 2025, to September 30, 2025, **705** visitors were interviewed in person at various locations, including downtown, hotels, the state park, special events, and via online survey campaigns.

Economic Impact:

Economic impact figures are based on all visitor types, including those staying in paid accommodations, unpaid accommodations, and day trippers.

Note: The sampling error for a sample size of 705 is $\pm 3.7\%$ points given a 95% confidence level. That is, we are very certain (95%) that the results in our Visitor Profile Study are within 3.7% points of the “true” value on a quarterly basis.

ECONOMIC IMPACT SUMMARY



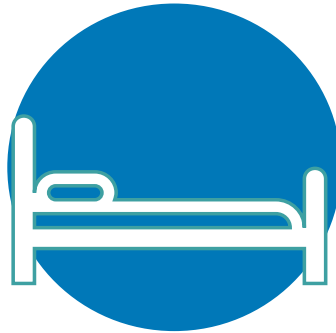
KEY PERFORMANCE INDICATORS*

Trends across many Florida destinations show a dip in visitation amongst all visitor types that began in August and grew in September. Spending decreases are less than visitor decreases due to an increased length of stay compared to July – Sept 2024.



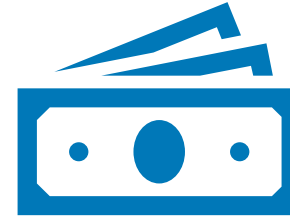
279,000

**Total
Visitors**



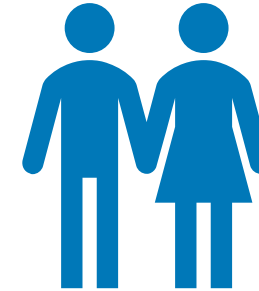
247,900

**Room
Nights**



\$134,949,300

**Direct
Spending****



\$203,349,900

Economic Impact

YoY Change:

↓ 19.9%

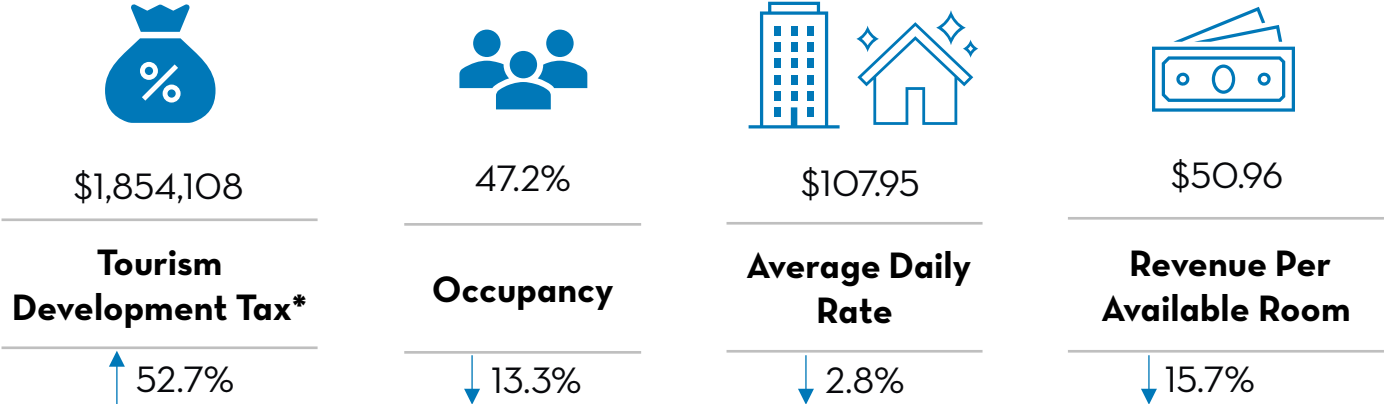
↓ 6.0%

↓ 11.9%

↓ 11.9%

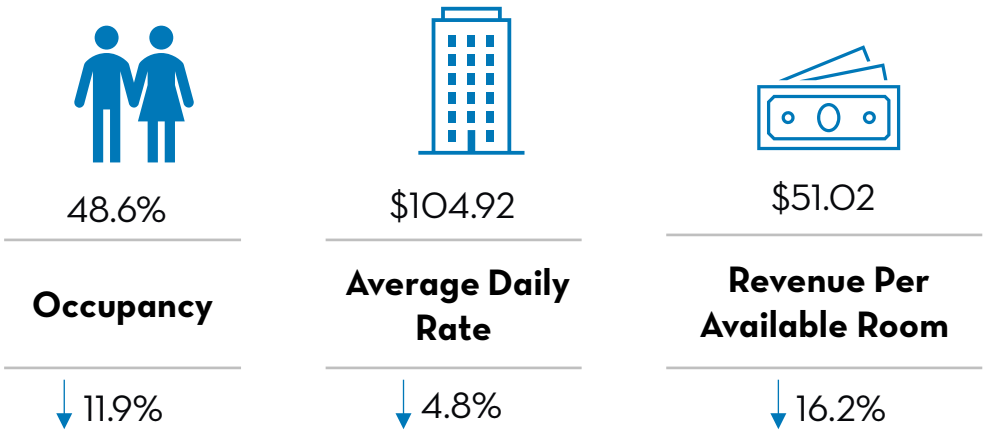
LODGING METRICS

COMBINED

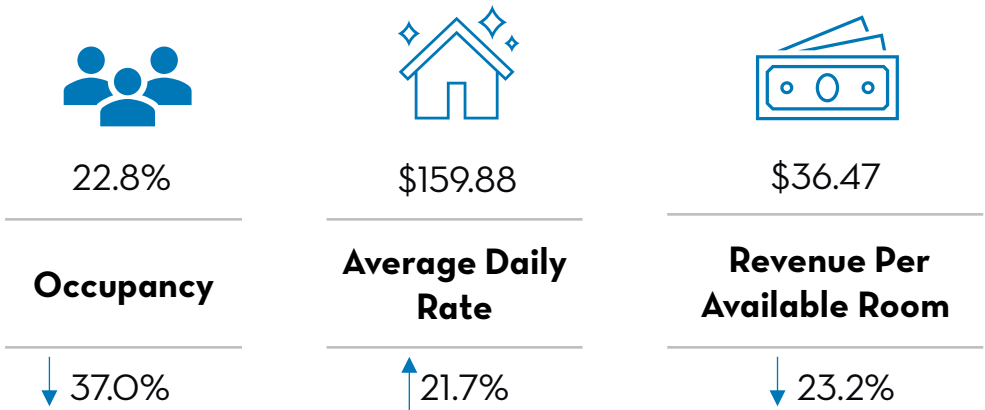


July - Sept 2025 Units	
Hotels	Vacation Rentals
5,395	312

HOTELS**



VACATION RENTALS***



* TDT in July-Sept was in the time frame in which the tax collector office was switching between platforms which resulted in a lag in reporting that threw off quarterly TDT collections compared to the same time frame last year

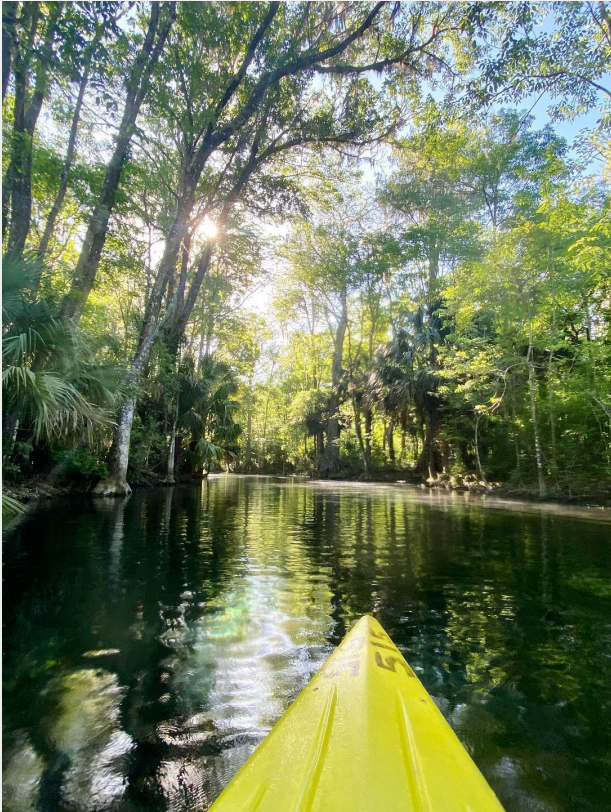
**Hotel source: Smith Travel Research

***Vacation rental source: Key Data

VISITOR PROFILE SUMMARY



VISITOR PROFILE



49

Median Age

35%

First-time Visitor

\$96,700

Median Household Income

45%

Traveled With Children

2.8

Travel Party Size

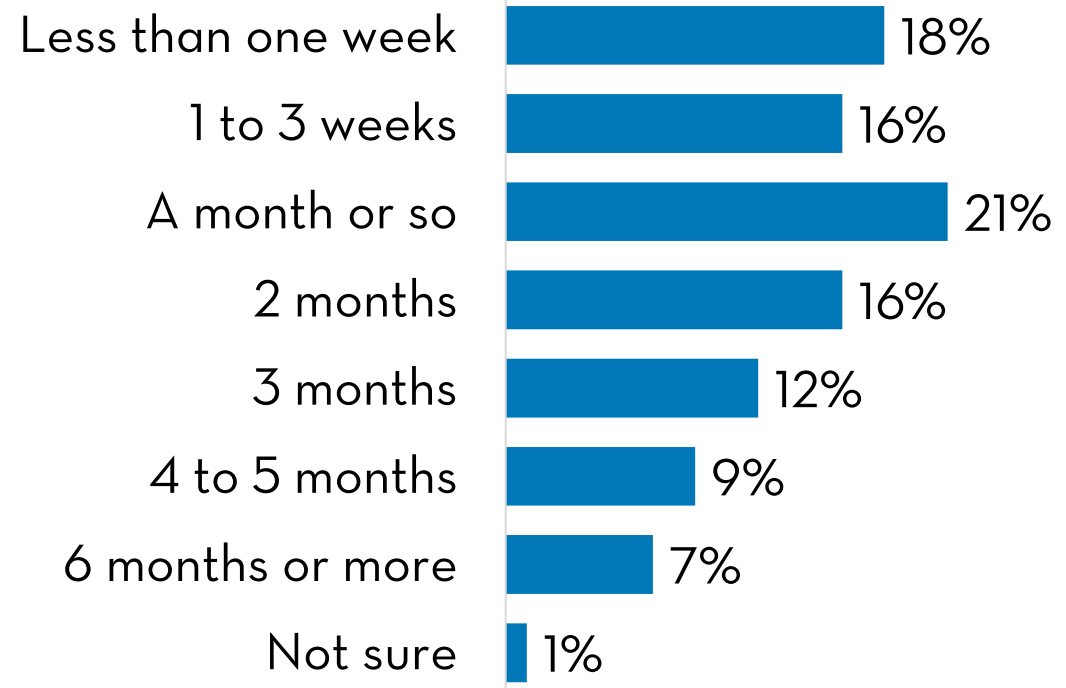
4.0

Length Of Stay

TRIP PLANNING CYCLE

How far in advance did you plan this trip to Ocala?

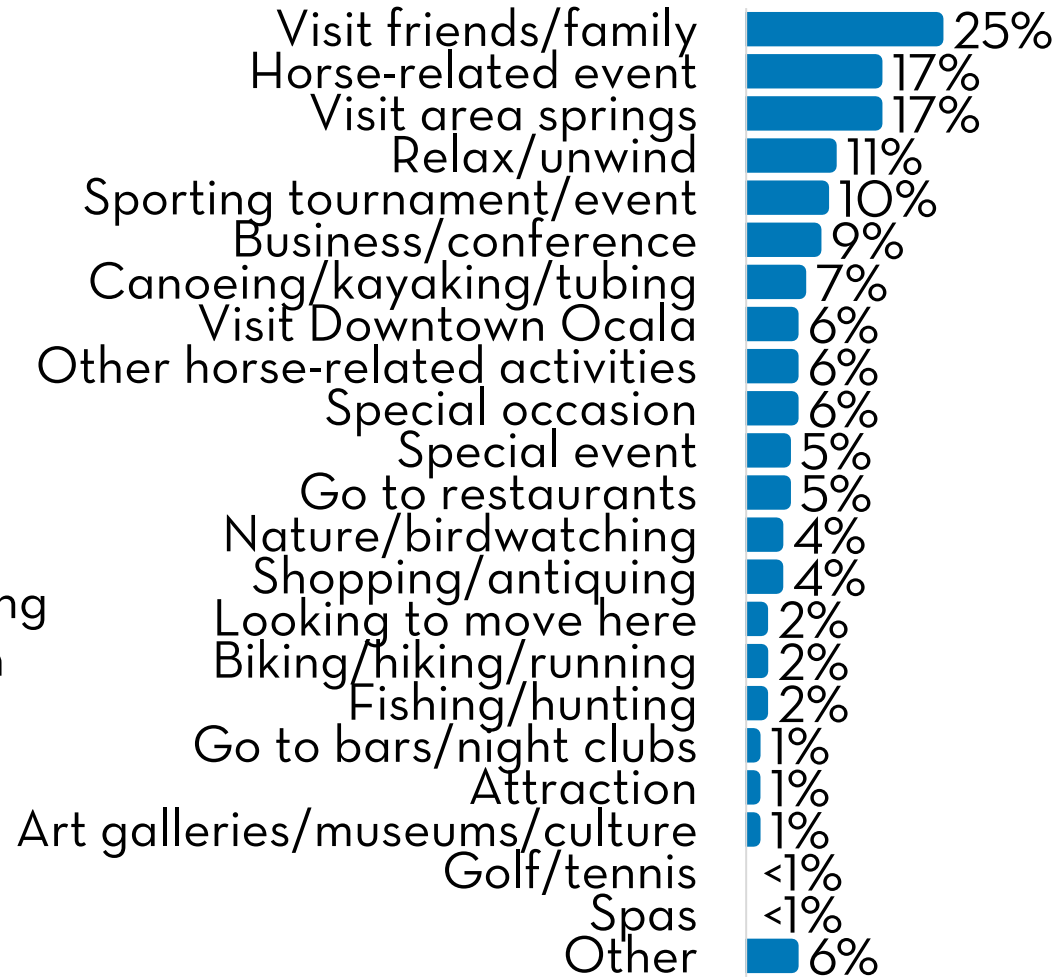
- **Insight:** The typical planning window of **54 days** in advance remains consistent with the previous year, despite the nationwide trend of shorter planning windows. July – Sept 2025 is also the shortest trip planning window in FY2025 for Ocala.
- **Action item:** Advertising windows can be closer to July-September time frame than other quarters with a shorter trip planning window and a strong draw of first-time visitors (35%)



TOP REASONS FOR COMING TO OCALA*

What was your main reason for taking this trip to Ocala?

- **Insight:** Horse-related events and local springs continue to consistently attract around **2 in 10** visitors to the area
- **Action item:** Continue promoting equestrian events and natural springs. Emphasize unique experiences of attending these events and spring-based recreation to sustain this steady draw

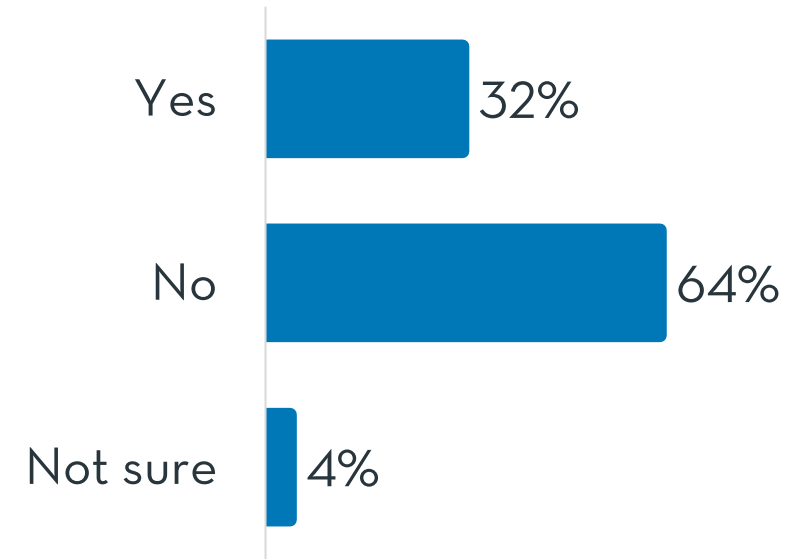


*Multiple responses permitted.

RECALL OF ADVERTISING*

- **Insight:** Advertising recall in July-Sept 2025 saw a sizable increase compared to July - Sept 2024 (+9%)
- **Action item:** Support multichannel strategies to maintain destination awareness especially amongst top used sources like television (32%), online advertisements (23%) and social media (23%)

Recalled Advertising



*Advertising efforts mentioned on this slide include VCB's efforts and the efforts of other organizations.

VISITOR ORIGINS & TRANSPORTATION

Top Origin States & International Countries*

Origin	Percent
Florida	56%
International	4%
Texas	2%
Georgia	4%
Illinois	2%
Indiana	2%
Michigan	3%
New York	2%
Pennsylvania	2%
Virginia	2%
West Virginia	2%
Wisconsin	2%
Alaska	2%
Hawaii	2%

Top Origin Markets*

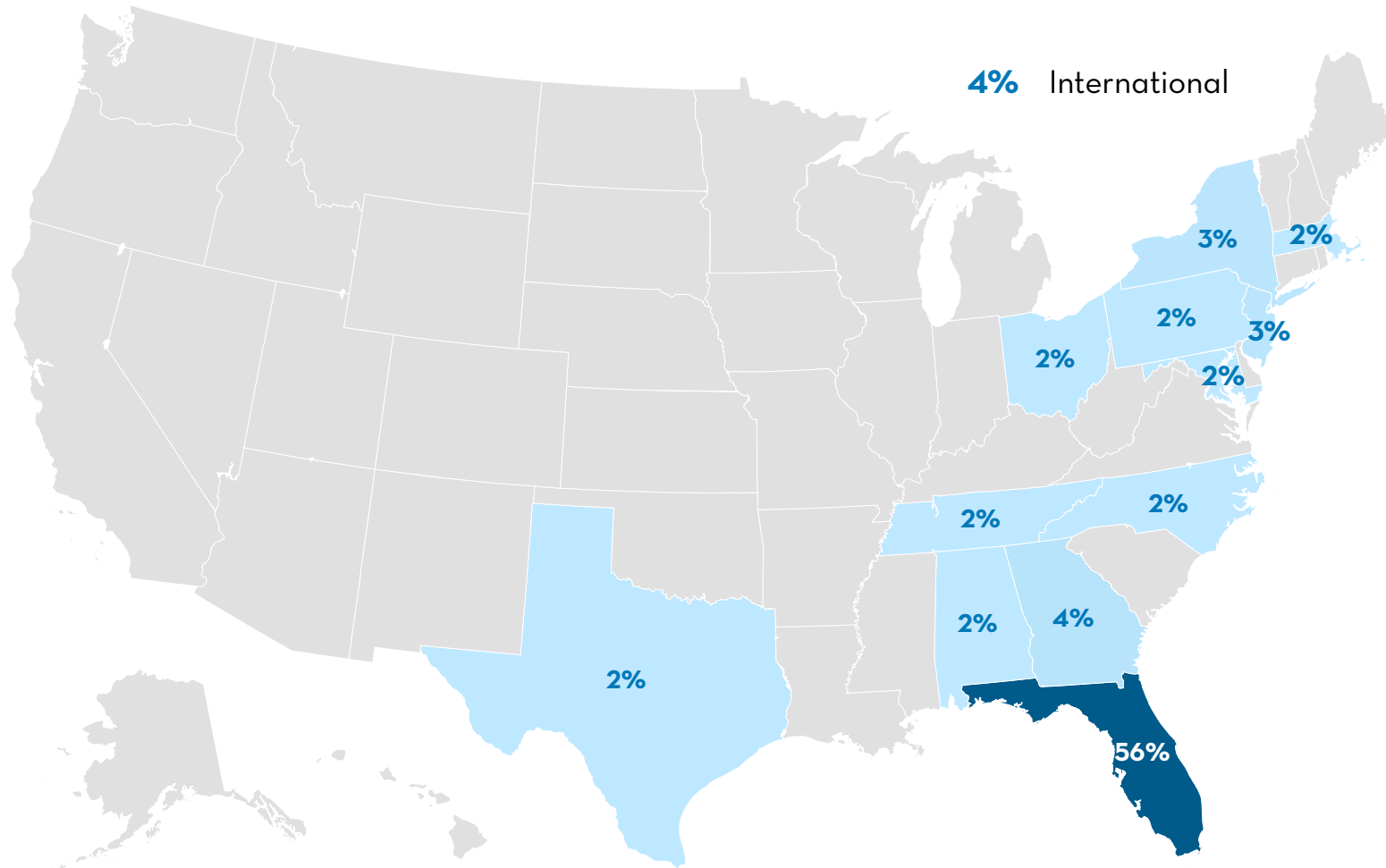
Market	Percent
Orlando-Daytona Beach-Melbourne	17%
Tampa-St. Petersburg	10%
Jacksonville	7%
Miami-Ft. Lauderdale	6%
Gainesville	5%
West Palm Beach-Ft. Pierce	5%
New York	4%
Atlanta	3%
Ft. Myers-Naples	2%
Philadelphia	2%
Tallahassee-Thomasville	2%

*Sources: DSG Visitor Tracking Study

Ocala
MARION COUNTY, FL
Visitors & Convention Bureau

DS
downs & st. germain
RESEARCH

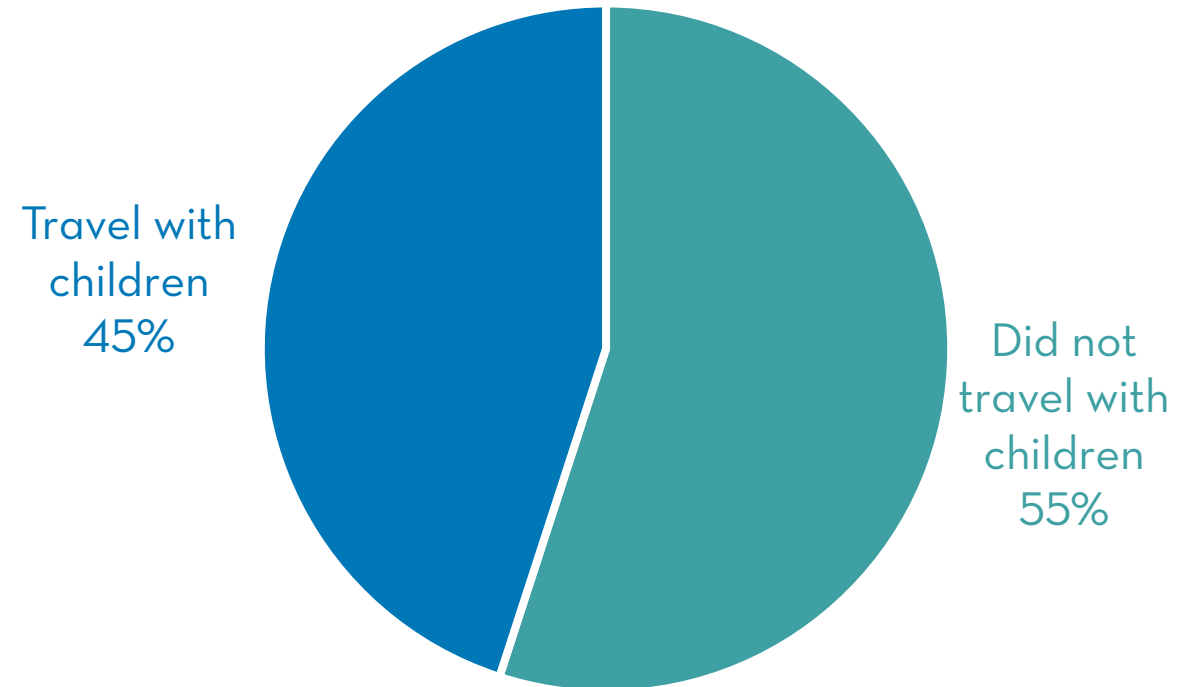
Top Origin States & International Countries*



Top Origin Markets*	Percent
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TRAVEL PARTIES

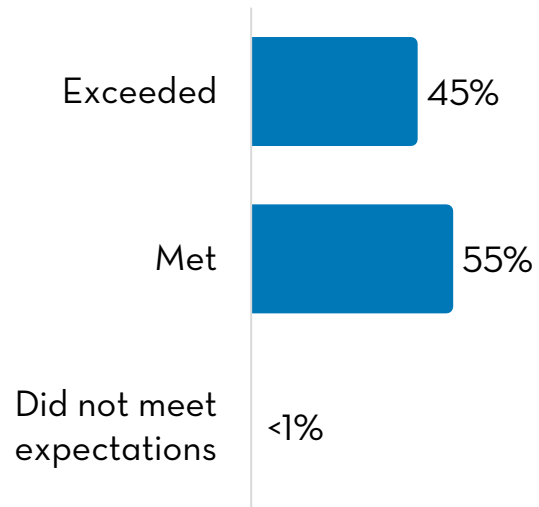
- **Insight:** July – Sept 2025 is the highest percentage of visitors traveling with children in FY2025
- **Action item:** Highlight marketing efforts towards family travel during the July-Sept timeframe



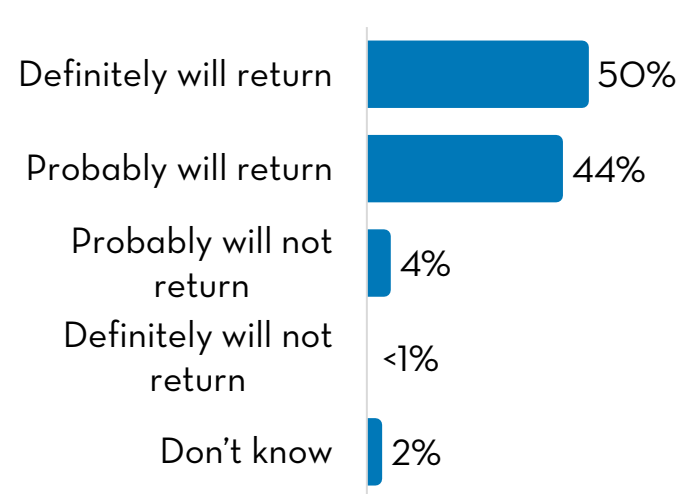
SATISFACTION STATISTICS*

- **Insight:** Visitors satisfaction metrics remain strong but there is slippage amongst the highest levels of satisfaction categories compared to July - September 2024. This could be due to a multitude of reasons including a national dip in travel and a perceived waning economy amongst the lower income brackets
- **Action item:** Continue to market towards your repeat visitors and those from higher earning income brackets for return visitation in the short term

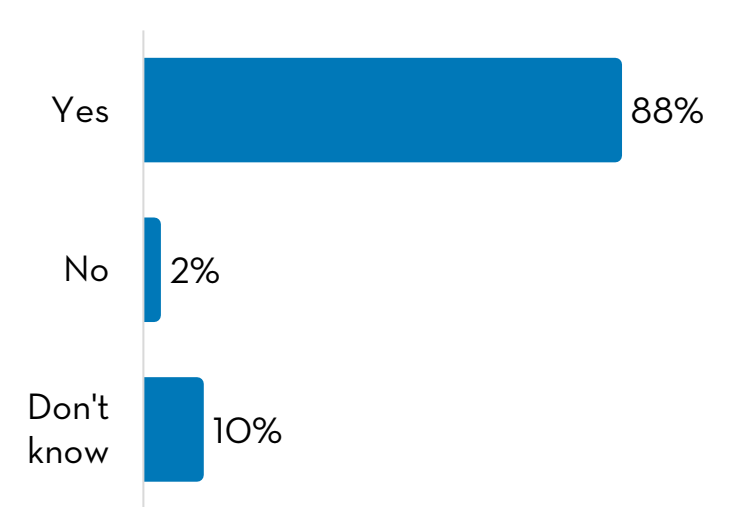
TRIP EXPERIENCE EXPECTATIONS



LIKELIHOOD TO RETURN



LIKELIHOOD TO RECOMMEND



*Main reasons for not returning included not enough to do during the day, or visitors preferring a variety of destinations.

VISITOR PROFILE INSIGHTS

Insights

Actionable Items

July-Sept is the lowest trip planning window in FY2025	Advertising windows can be closer to July-September time frame than other quarters
Horse-related events and local springs continue to attract a consistent share of visitors	Continue promoting equestrian events and natural springs
Ad recall is increasing year over year	Support multichannel strategies to maintain destination awareness
Traveling with children higher than other quarters	Market towards family travel during the summer season of July-Sept
Nearly half of visitors find that their trip experience exceeds their expectations	Identify opportunities to elevate the visitor experience, particularly in areas where expectations are being met
Half of the visitors would definitely return	Strengthen visitor loyalty by encouraging repeat visitation through targeted campaigns, return-visitor incentives, and new experience highlights

TOP REASONS FOR CHOOSING THE AREA*



- “Ocala is quiet and more in touch with nature than the coast. The springs are a must-see.”
- “Love the country vibes and cute gift shops downtown.”
- “Beautiful little town with rural vibes.”
- “Pretty, quiet, not much traffic, friendly people.”
- “Great equestrian community in rural Central Florida.”

DETAILED FINDINGS

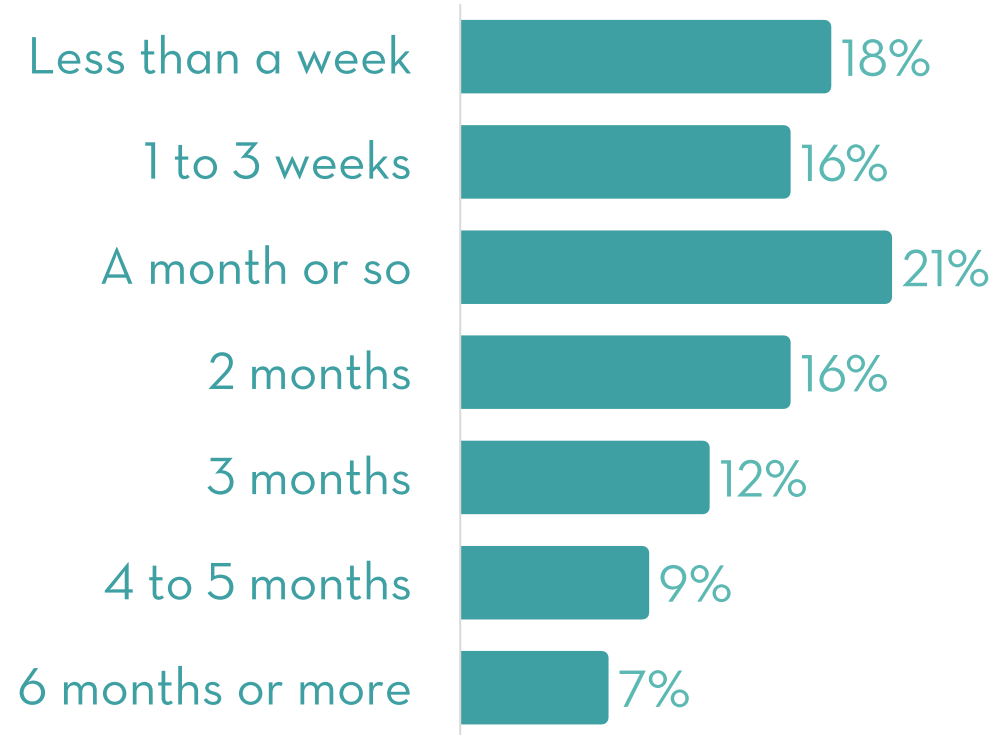


VISITOR JOURNEY: PRE-VISIT



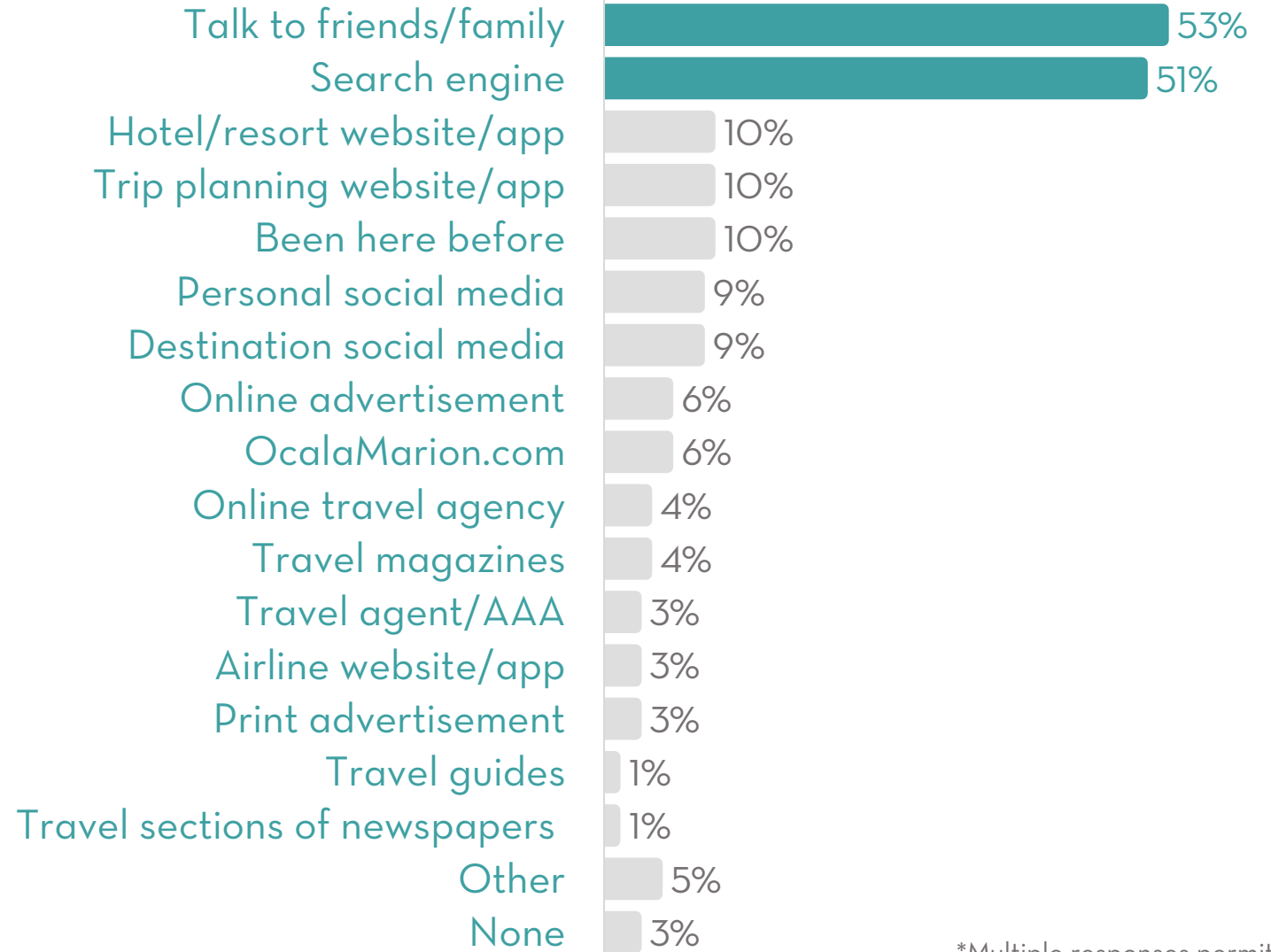
TRIP PLANNING CYCLE

- » **Around 6 in 10** of visitors planned their trips to the Ocala/Marion County area **a month or less in advance**
- » Nearly **3 in 10** visitors planned their trips **at least 3 months in advance**
- » The typical planning window was **54 days in advance**



TRIP PLANNING SOURCES*

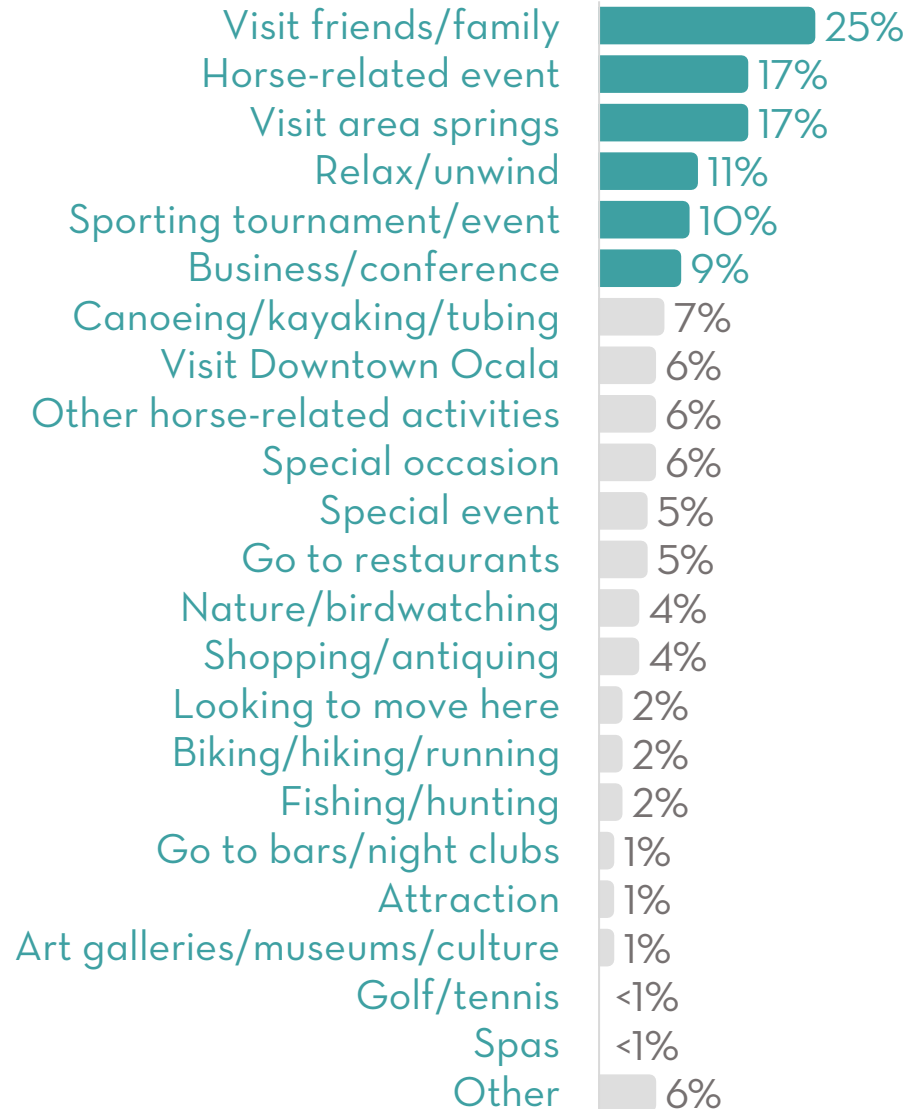
- » **Talking to friends** and **search engines** are the **top planning sources** for trips to Ocala/Marion County
- » Around **1 in 10** plan their trip using a **hotel/resort website** or **app**, a **trip planning website** or **app**, their **previous experience** visiting the destination, or **social media**



*Multiple responses permitted

REASONS FOR VISITING*

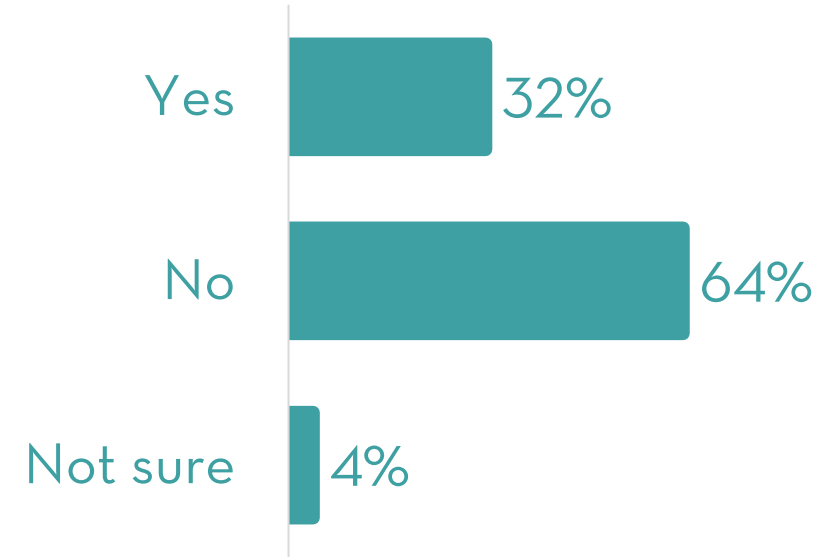
- » **Visit friends and family, Equestrian events** and **local springs** are the **top three** reasons for coming
- » Around **1 in 10** visitors came to Ocala/Marion County for **relaxing/unwinding, sporting tournament/event**, or **business/conference**



RECALL OF ADVERTISING*

- » Nearly **1 in 3** visitors recalled advertising about the Ocala/Marion County area
- » Of the visitors who recalled advertising, nearly **3 in 4** (representing **23%** of all visitors) were influenced by this information to come to the area

Recalled Advertising

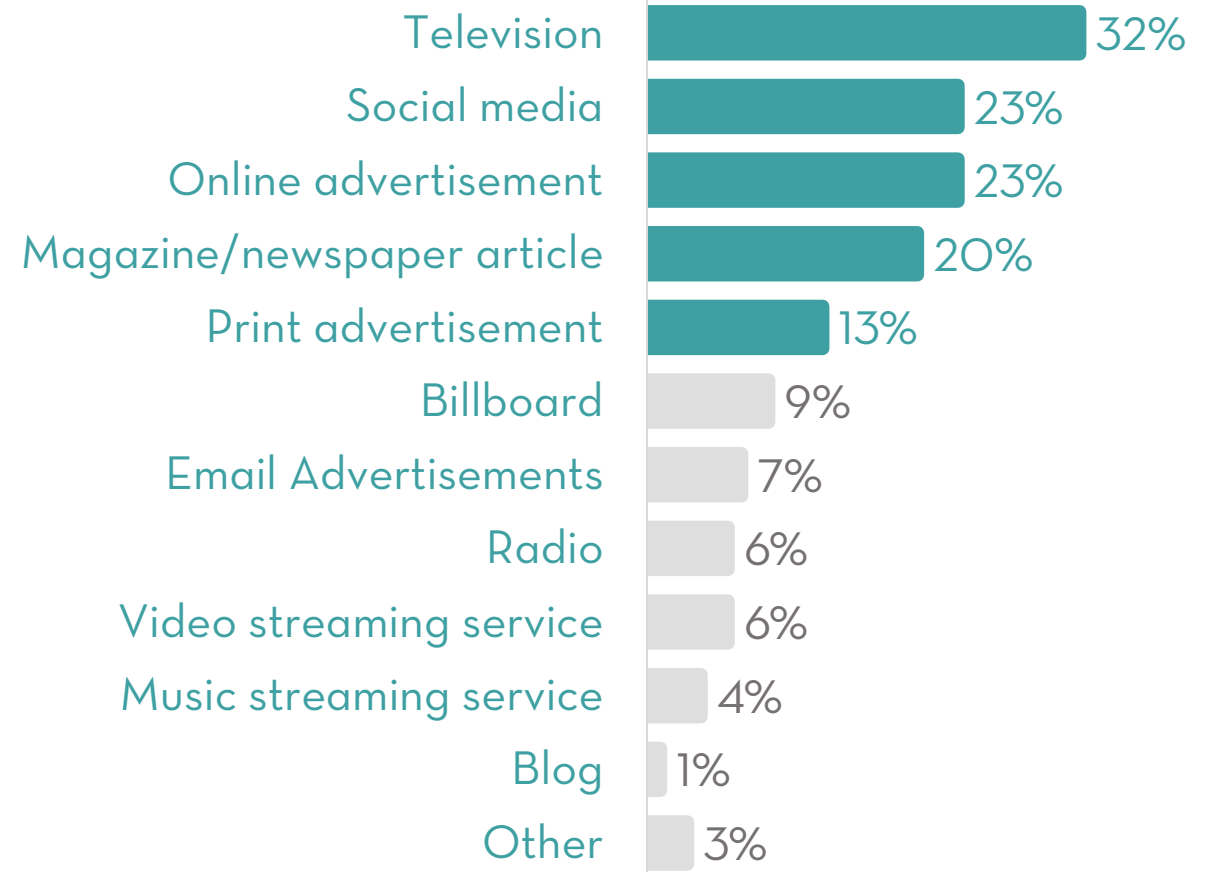


*Advertising efforts mentioned on this slide include VCB's efforts and the efforts of other organizations.

ADVERTISING SOURCE*

- » Nearly **1 in 3** visitors who recalled advertisements for the Ocala/Marion County area saw it on **Television**
- » Around **2 in 10** visitors who recalled advertising for the Ocala/Marion County area saw it on **social media**, via an **online ad**, or in a **magazine/newspaper article**

Base: 32% of visitors who recalled advertising



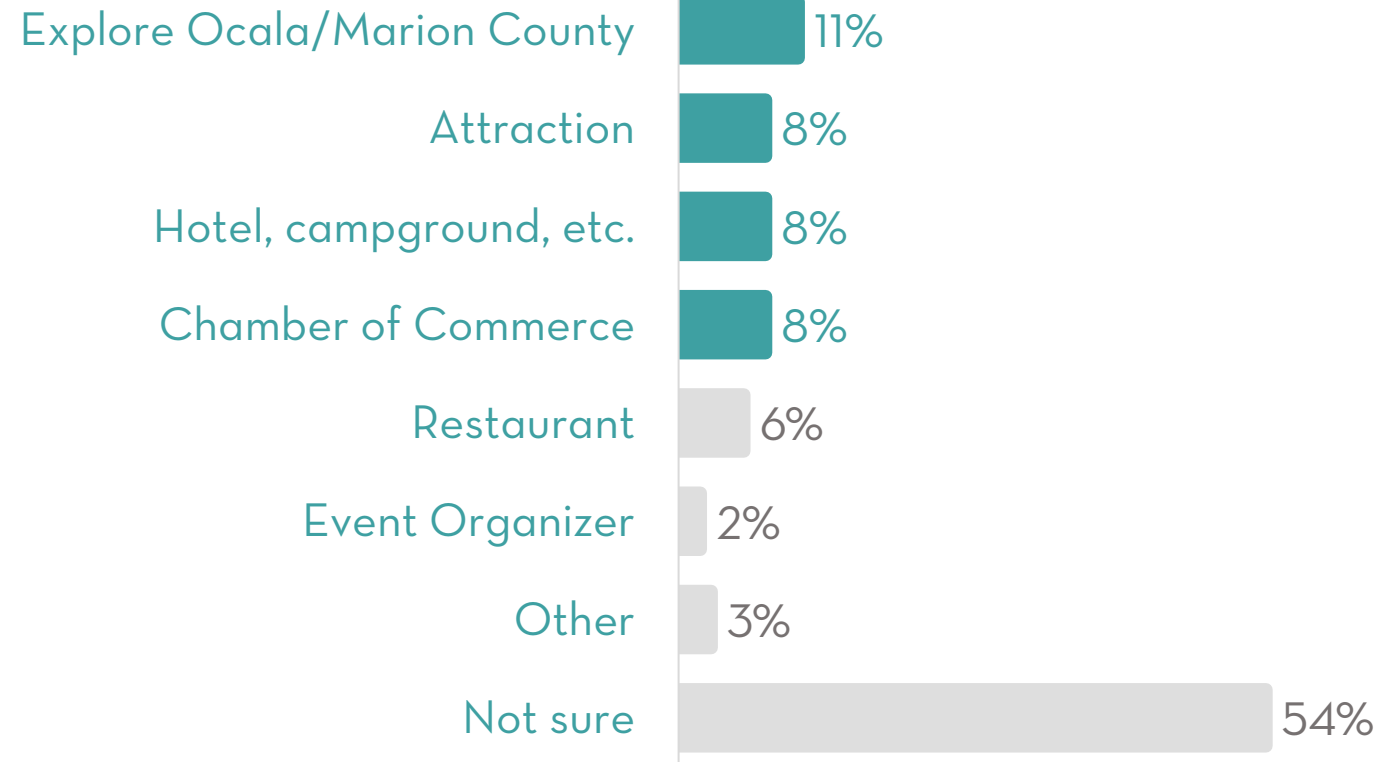
* Multiple responses permitted

** Advertising efforts mentioned on this slide include VCB's efforts and the efforts of other organizations.

SPONSORED ADVERTISEMENT*

- » **Around 1 in 10** visitors who recalled advertising for the Ocala/Marion County area noted **Explore Ocala/Marion County**, an **attraction, hotel, campground, etc.**, or **Chamber of Commerce** as a sponsor of the advertisement

Base: 32% of visitors who recalled advertising

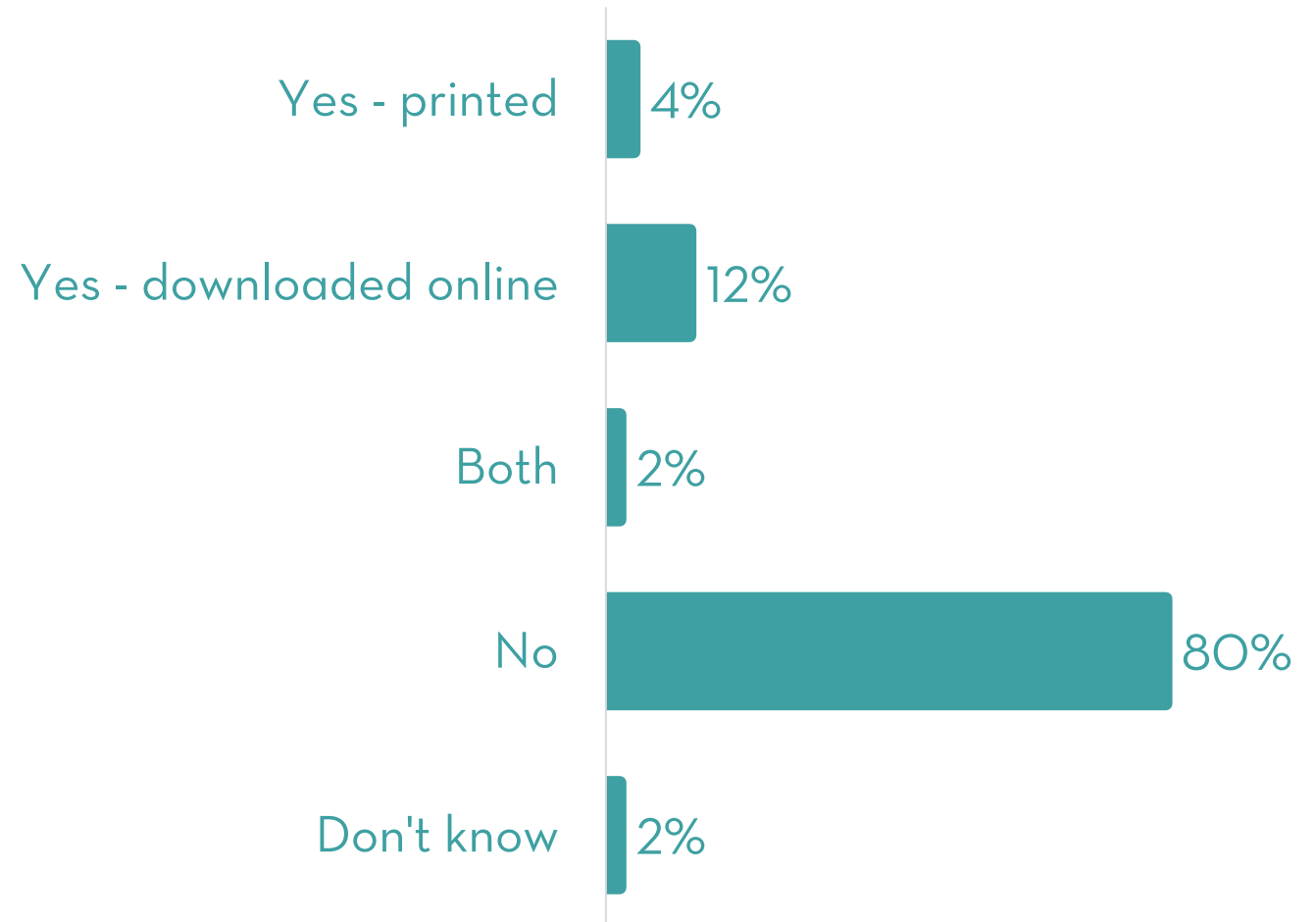


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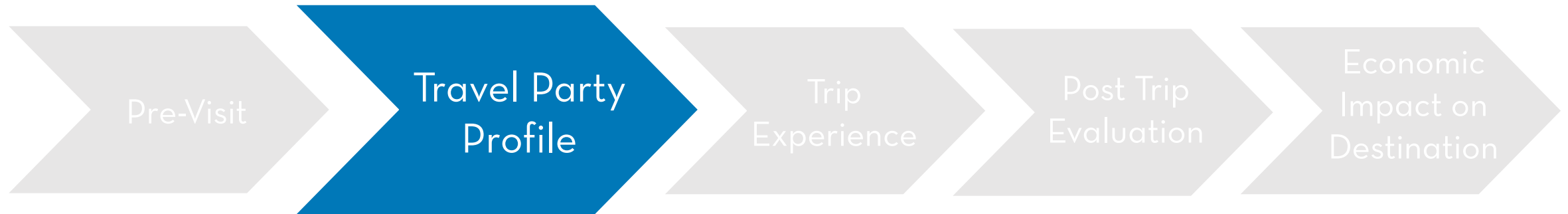
VISITOR GUIDE

- » Nearly **1 in 5** of visitors requested or downloaded the **print and/or online visitor guide**
- » The visitor guide received the rating of **8.1 out of 10***

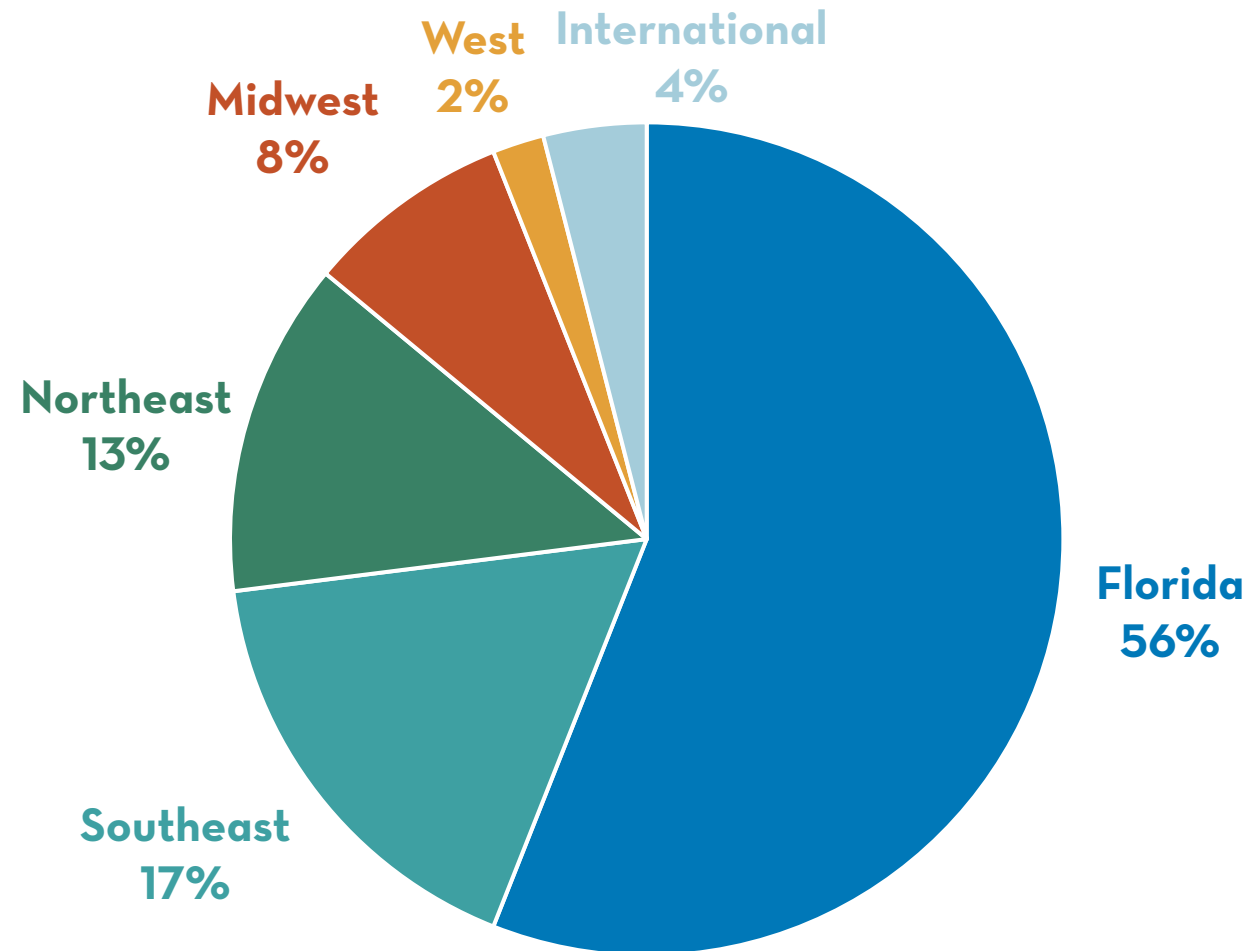


*On a scale from 1 to 10 where 10 is extremely useful and 1 is not useful at all

VISITOR JOURNEY: TRAVEL PARTY PROFILE



REGION OF ORIGIN



TOP ORIGIN STATES

- » Over **4 in 5** visitors came to Ocala/Marion County from 13 states
- » **Florida** was the key origin state for the Ocala/Marion County area

State	Percent
Florida	56%
Georgia	4%
New Jersey	3%
New York	3%
Alabama	2%
Maryland	2%
Massachusetts	2%
North Carolina	2%
Ohio	2%
Pennsylvania	2%
Tennessee	2%
Texas	2%
Virginia	2%

TOP ORIGIN MARKETS

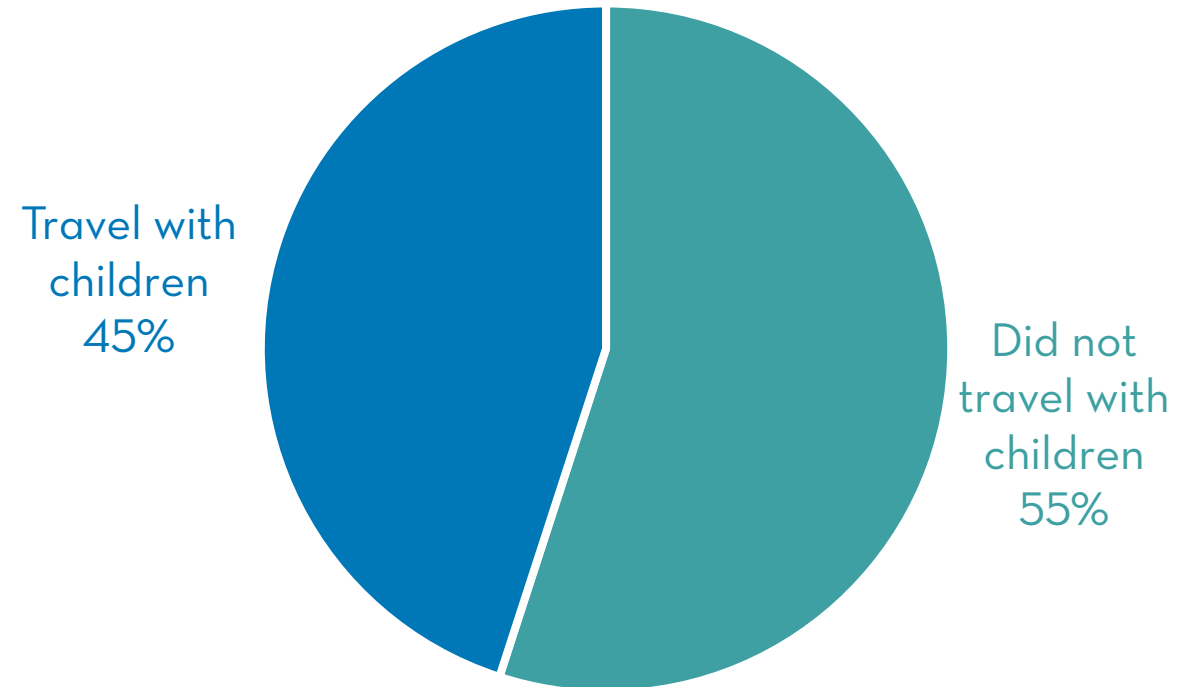
- » **Orlando-Daytona Beach-Melbourne, Tampa-St. Petersburg and Jacksonville** were key origin markets this quarter
- » Non-Florida markets included **New York, Atlanta**, and **Philadelphia**

Market	Percent
Orlando-Daytona Beach-Melbourne	17%
Tampa-St. Petersburg	10%
Jacksonville	7%
Miami-Fort Lauderdale	6%
Gainesville	5%
West Palm Beach-Ft. Pierce	5%
New York*	4%
Atlanta	3%
Fort Myers-Naples	2%
Philadelphia	2%
Tallahassee-Thomasville	2%

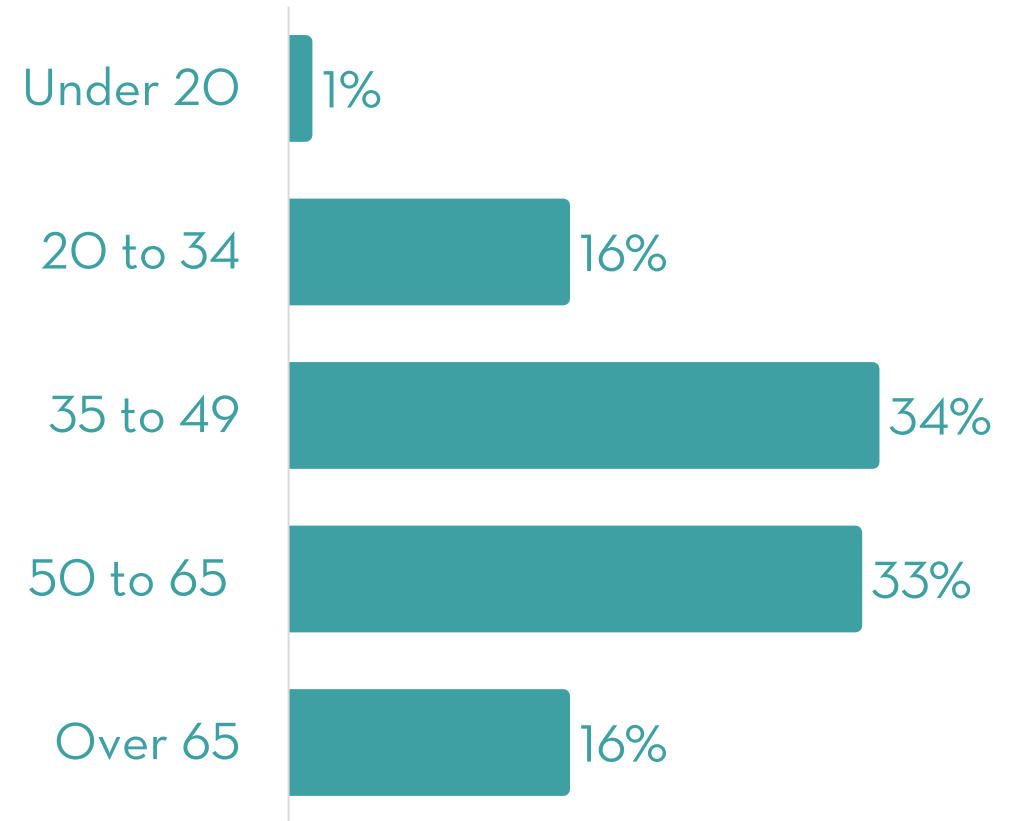
*New York City includes areas of New York, New Jersey and Connecticut

TRAVEL PARTIES

- » The typical travel party size was **2.8** people
- » **Nearly 1 in 2** travel parties included children under the age of 18

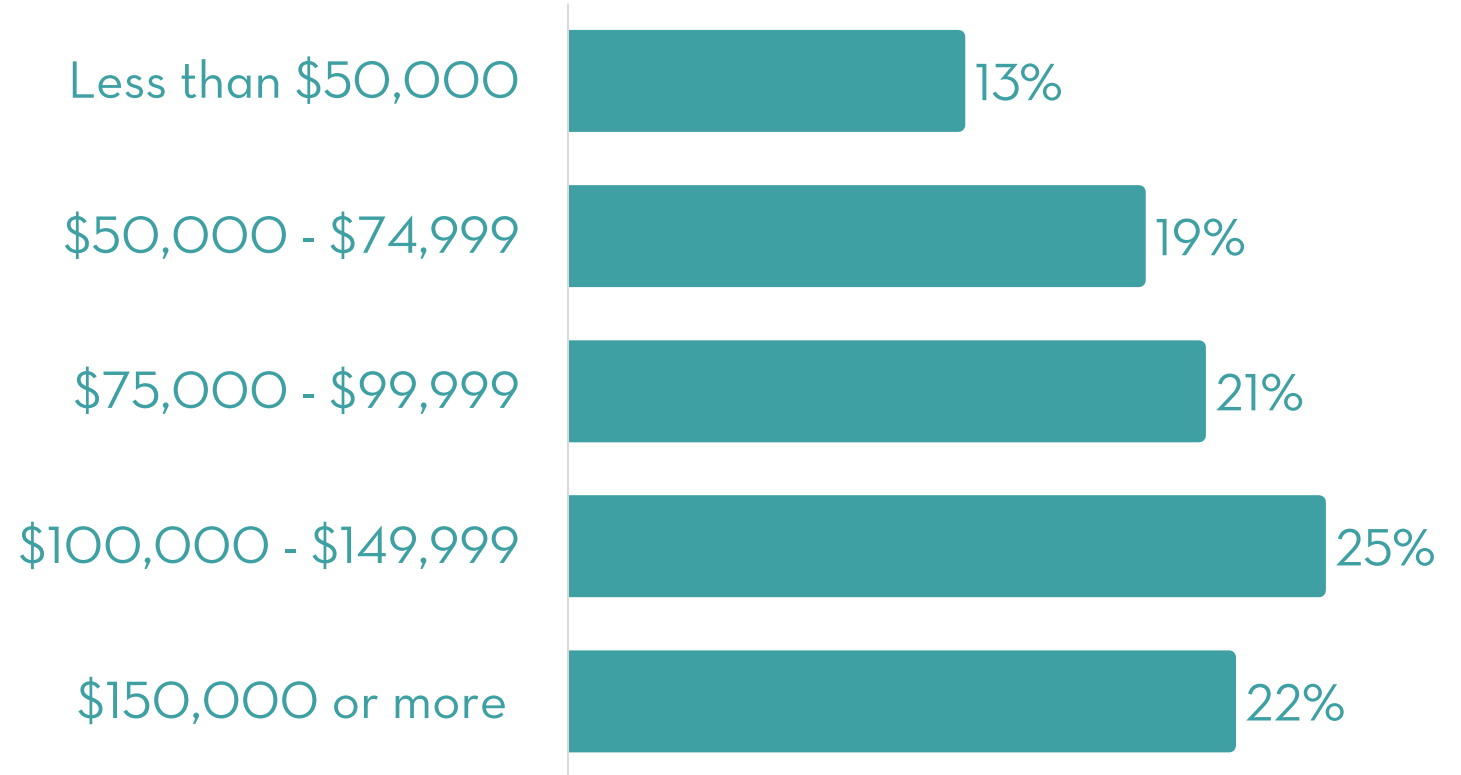


» The median age of visitors to the Ocala/Marion County area was **49**

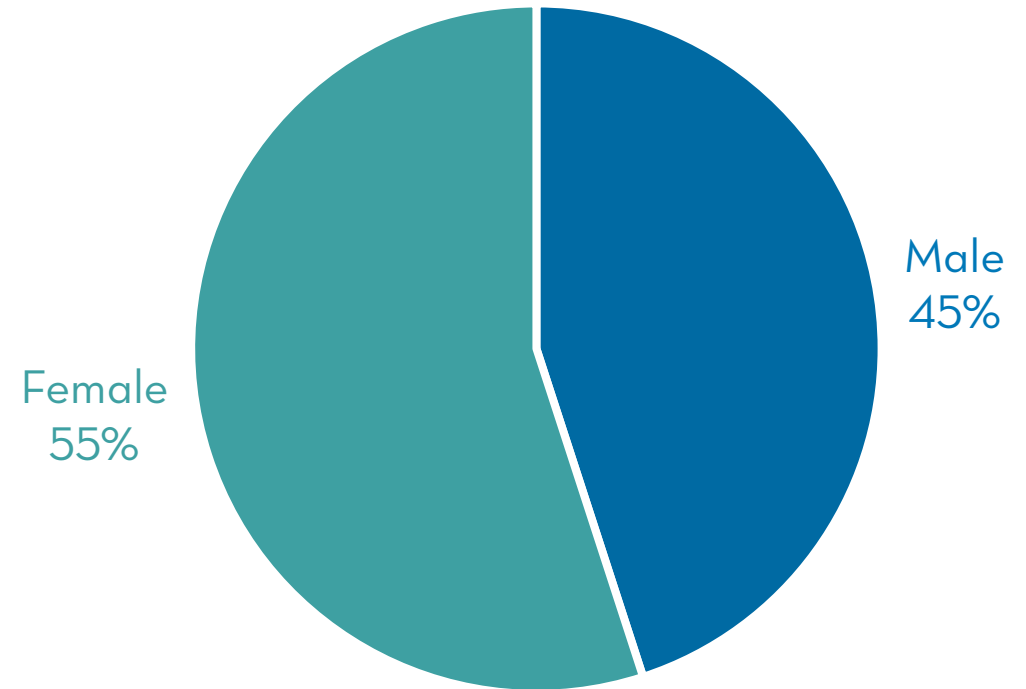


HOUSEHOLD INCOME

- » Visitors to the Ocala/Marion County area had a median household income of **\$96,700** per year
- » **Nearly 1 in 2** visitors had household incomes over **\$100,000**



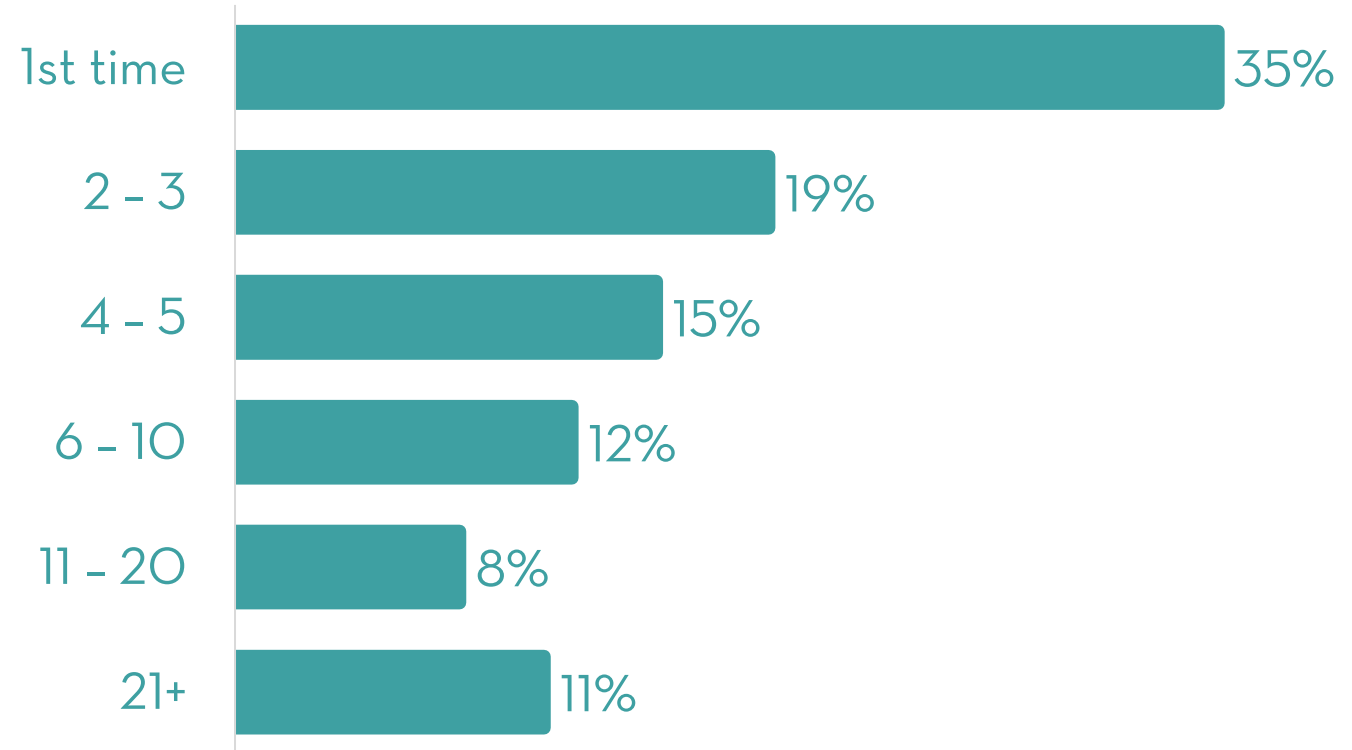
» **55%** of visitors interviewed were **female**



*Gender of member of travel party surveyed. May be influenced by visitors' willingness to take a survey.

NEW & RETURNING VISITORS

- » **Over 1 in 3** visitors said **this was their first time visiting** the Ocala/Marion County area
- » **Nearly 1 in 5** were repeat visitors, having visited over 10 times

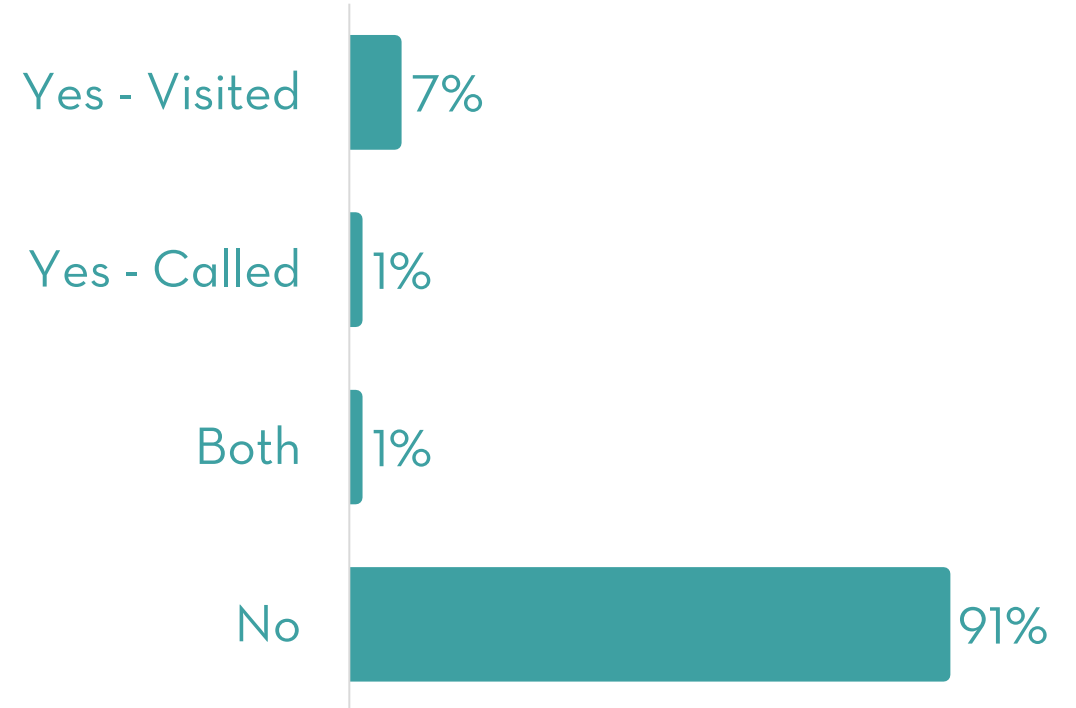


VISITOR JOURNEY: TRIP EXPERIENCE



VISITOR CENTER

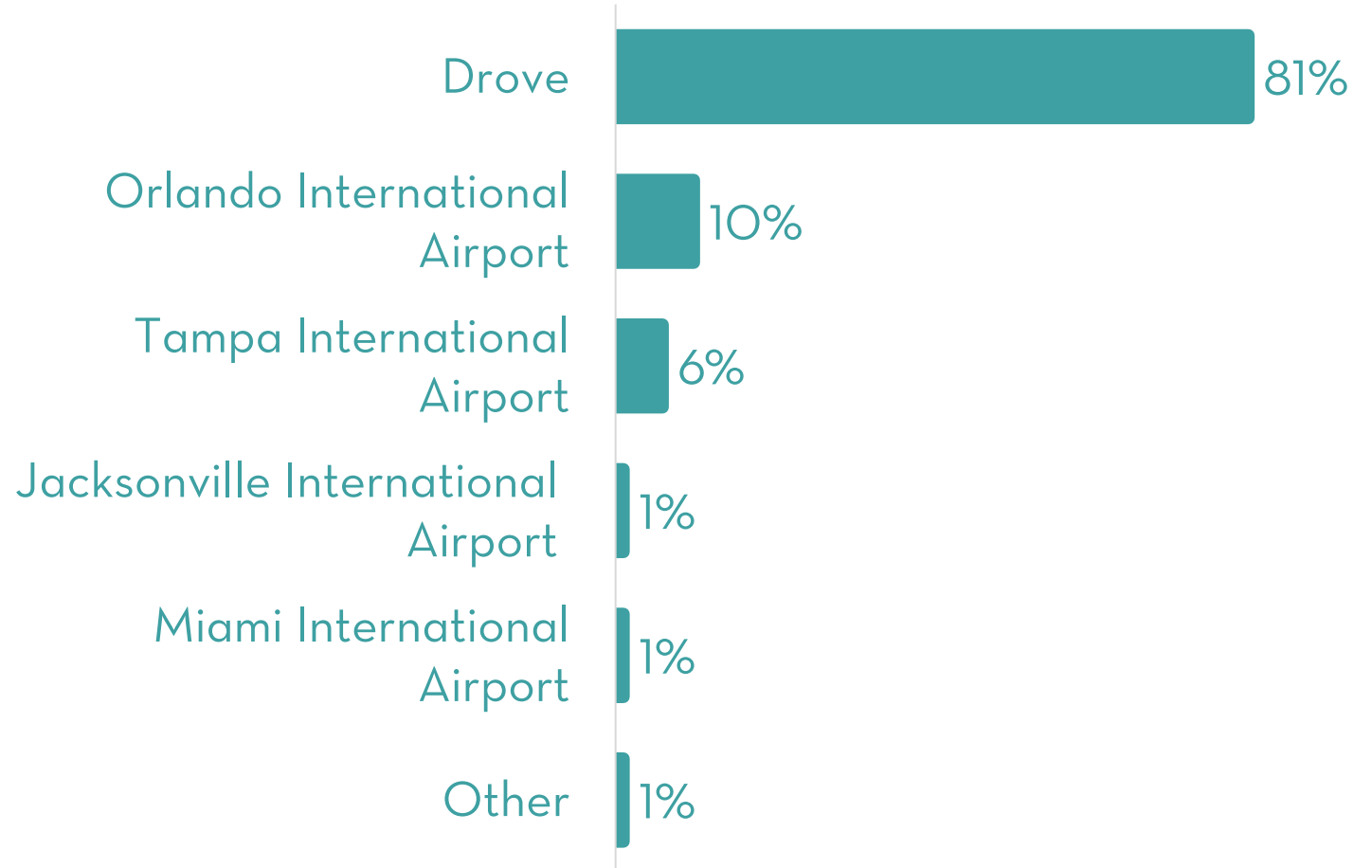
- » **9%** of visitors **visited** or **called the Visitor Center**
- » The Visitor Center customer service was rated at **8.3 out of 10***



*On a scale from 1 to 10, where a service rated as a 10 is Excellent and a service rated as a 1 is poor

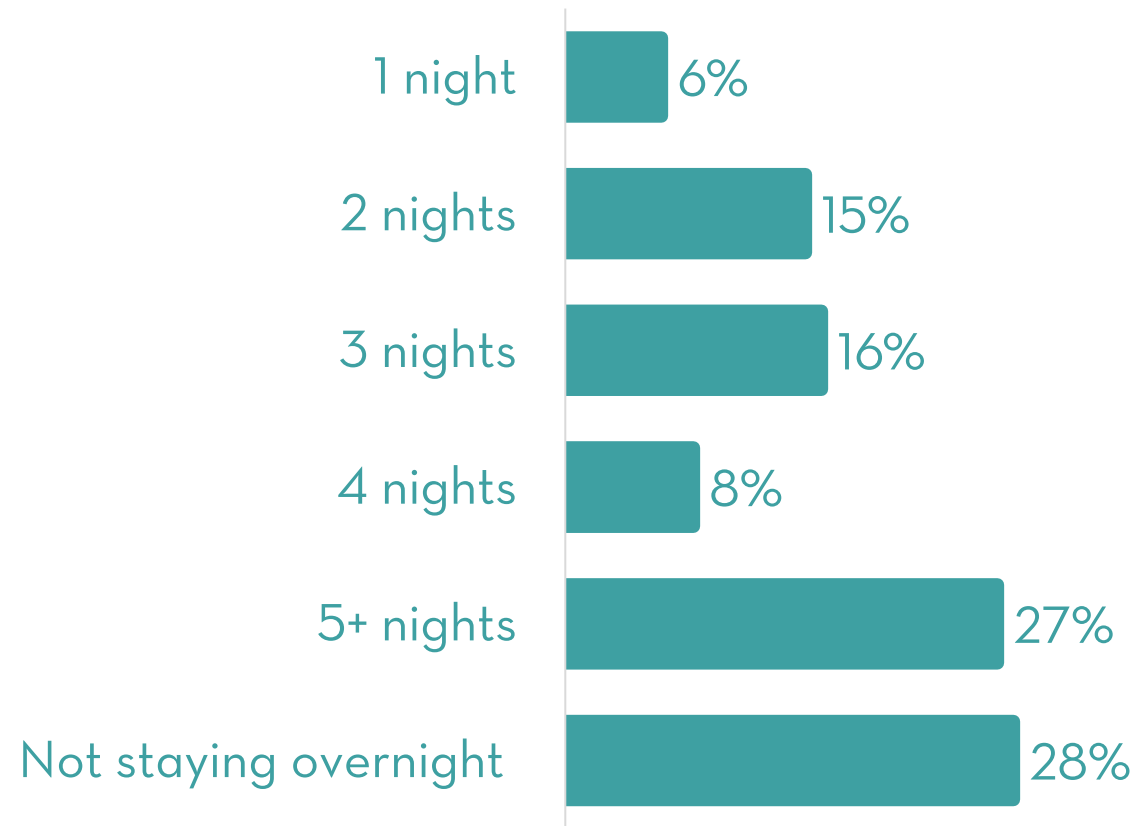
TRANSPORTATION

- » **81%** of visitors **drove** to the Ocala/Marion County area for their trip
- » **10%** of **all** visitors arrived at **Orlando International Airport**



NIGHTS

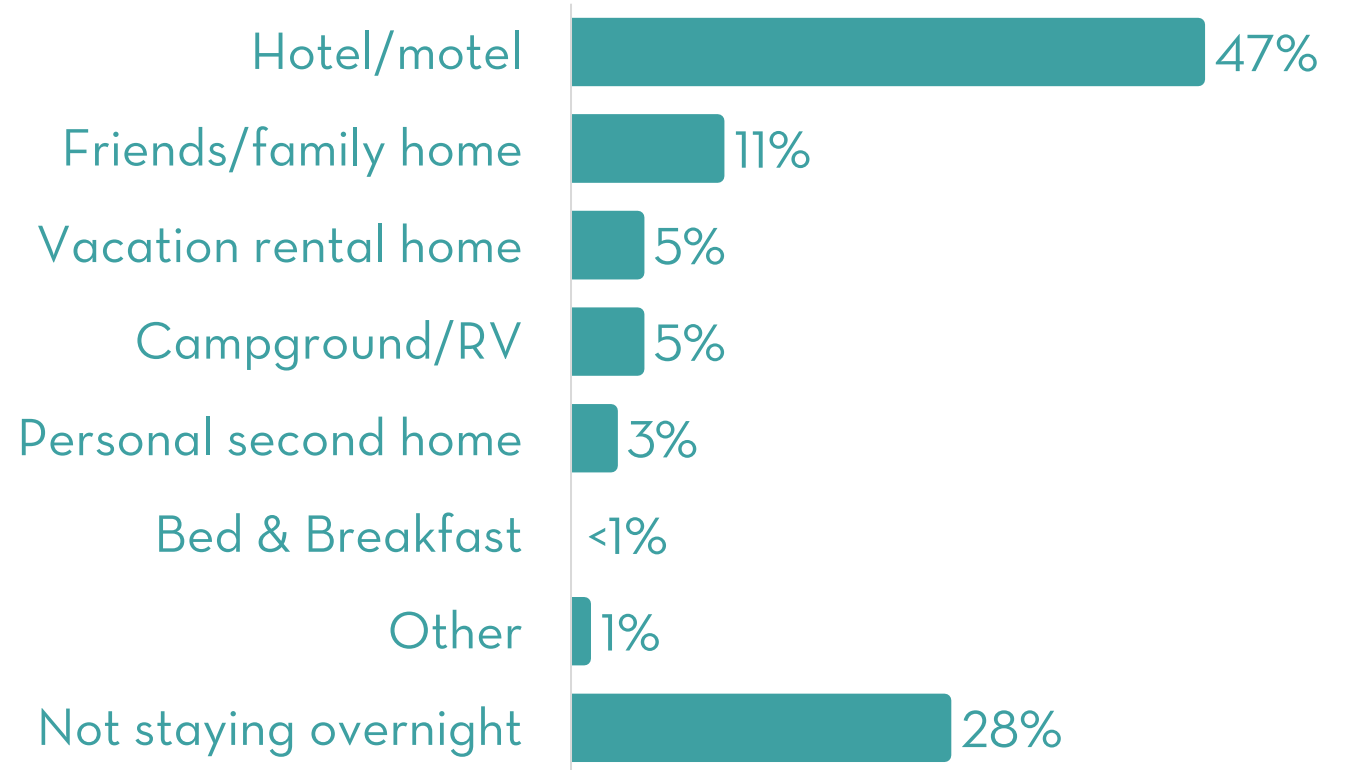
- » Visitors stayed **4.0** nights in Ocala/Marion County*
- » Visitors staying in paid accommodations stayed **4.6** nights in the Ocala/Marion County area



*Includes visitors who stayed in paid accommodations, unpaid accommodations, and day trippers.

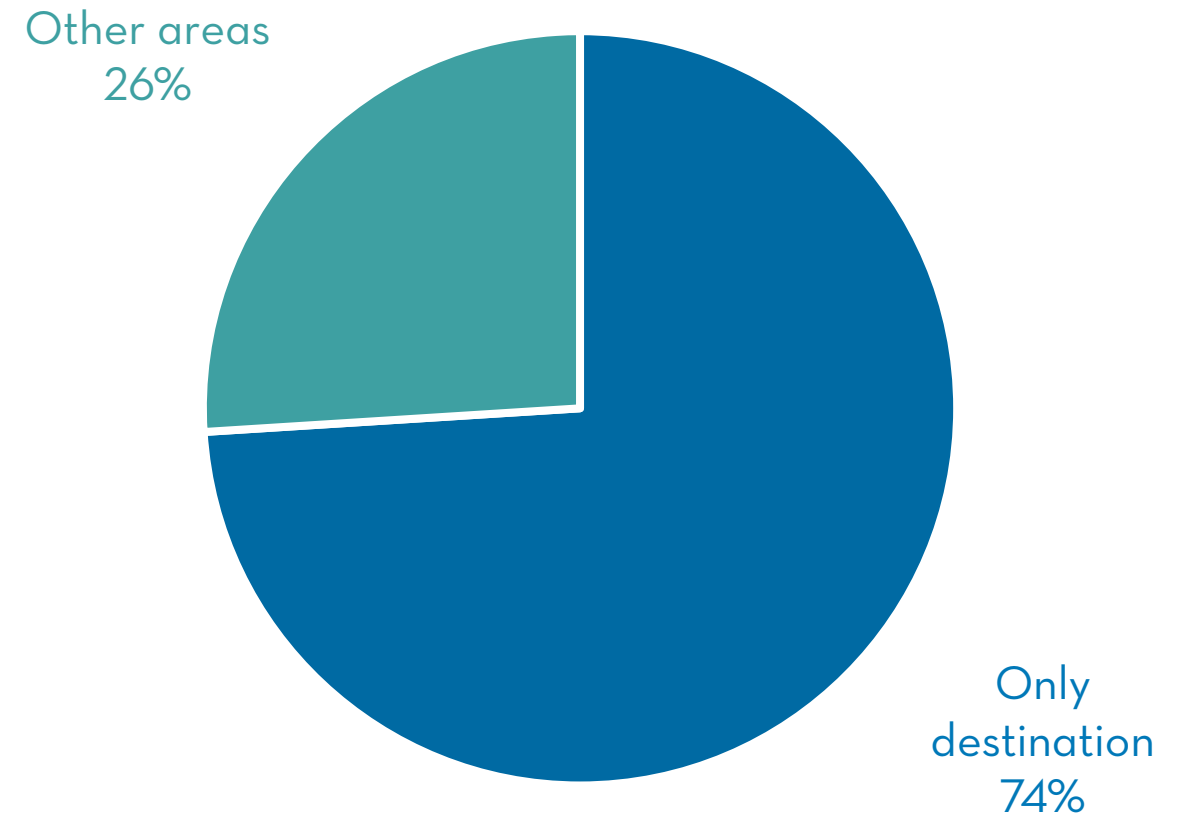
ACCOMMODATIONS

- » **Nearly half** of visitors stayed overnight in a **hotel or motel**



VISITING OTHER AREAS

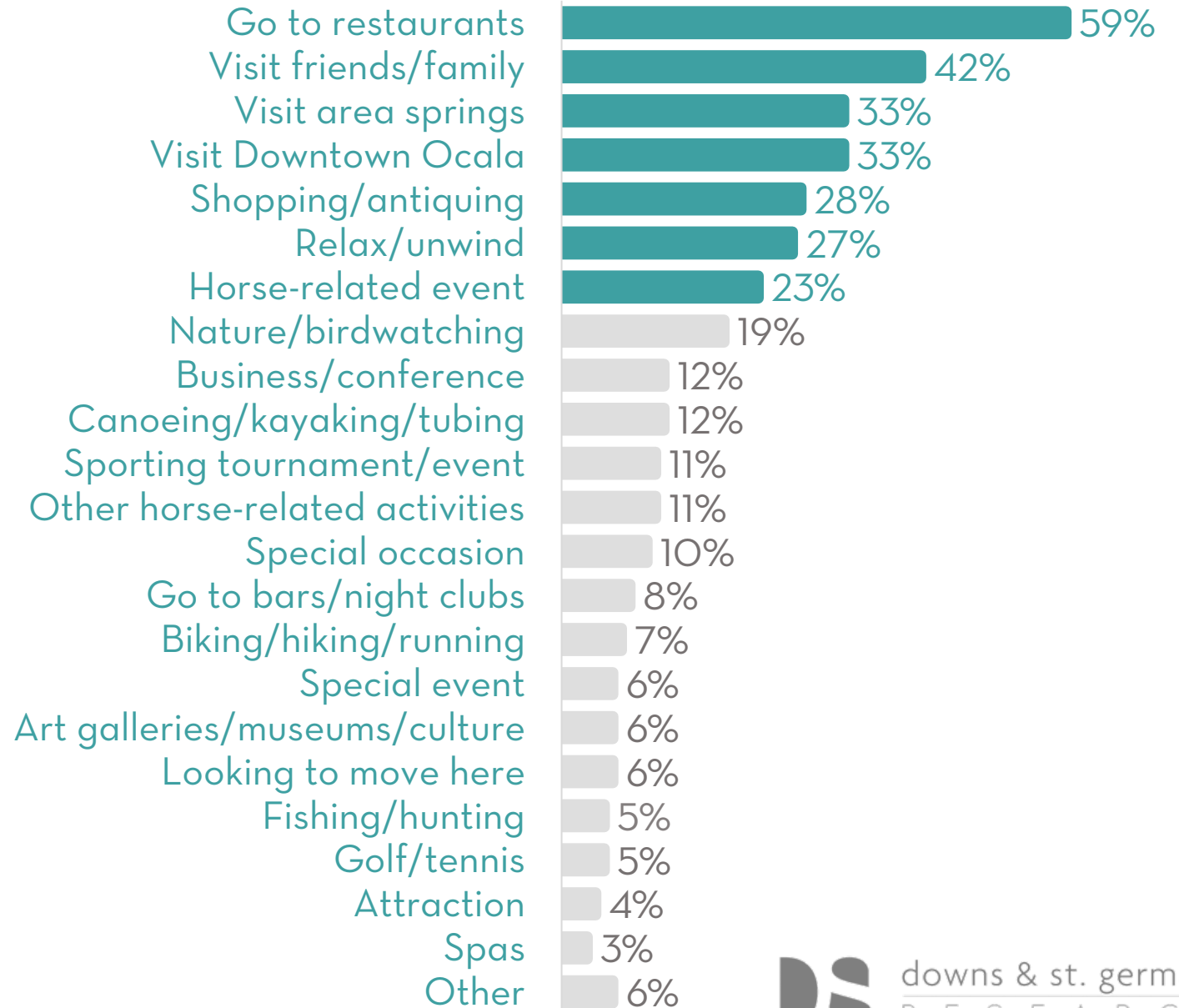
- » For nearly **3 in 4** visitors, Ocala/Marion County was the **only destination** on their trip



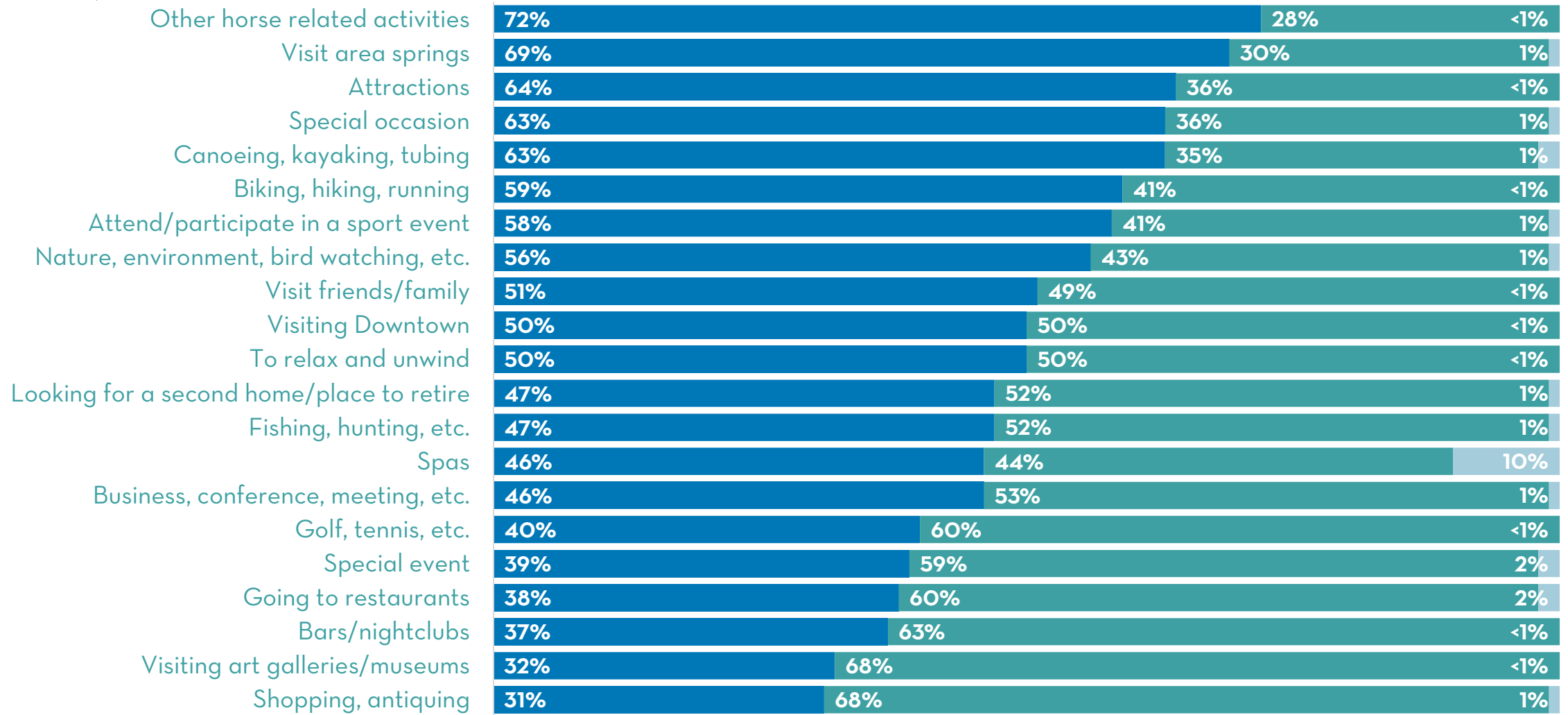
VISITOR ACTIVITIES*

- » **Going to restaurants** is the number one activity, as **nearly 3 in 5** visitors went out to eat
- » Around **1 in 3** visitors enjoyed **Downtown Ocala, Visiting friends and relatives, area springs, shopping/antiquing**, and **relaxing/unwinding** during their visit

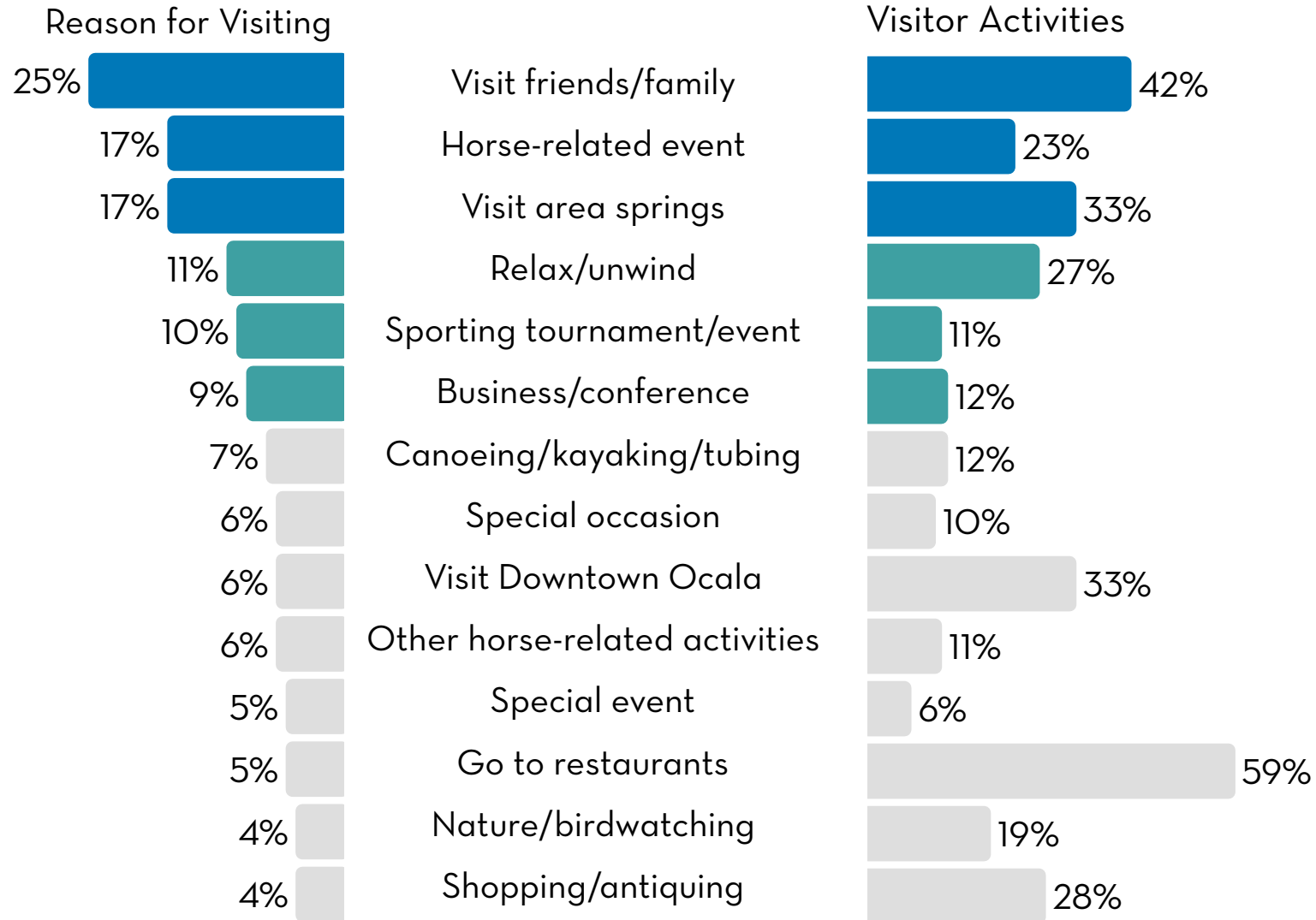
*Multiple responses permitted.



VISITOR ACTIVITY RATINGS



ACTIVITIES VS. REASON FOR VISIT*



*Multiple responses permitted.

TRAVEL PARTY SPENDING

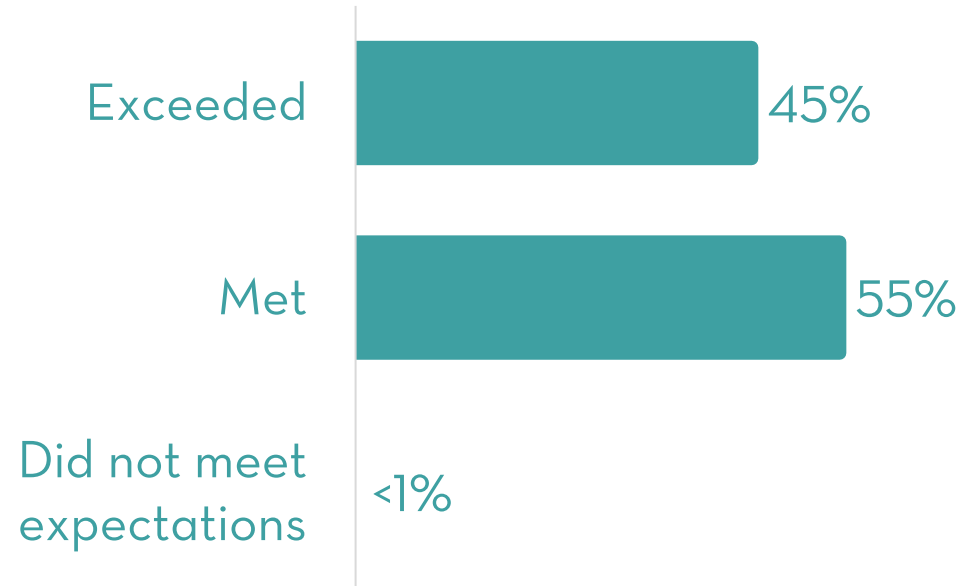
	<i>Daily Travel Party Spending: All Visitors</i>	<i>Total Travel Party Spending: All Visitors</i>
<i>Accommodations</i>	<i>\$62¹</i>	<i>\$248</i>
<i>Restaurants</i>	<i>\$77</i>	<i>\$308</i>
<i>Groceries</i>	<i>\$21</i>	<i>\$84</i>
<i>Shopping</i>	<i>\$53</i>	<i>\$212</i>
<i>Entertainment</i>	<i>\$43</i>	<i>\$172</i>
<i>Transportation</i>	<i>\$29</i>	<i>\$116</i>
<i>Other</i>	<i>\$31</i>	<i>\$124</i>
Total	\$316	\$1,264

VISITOR JOURNEY: POST-TRIP



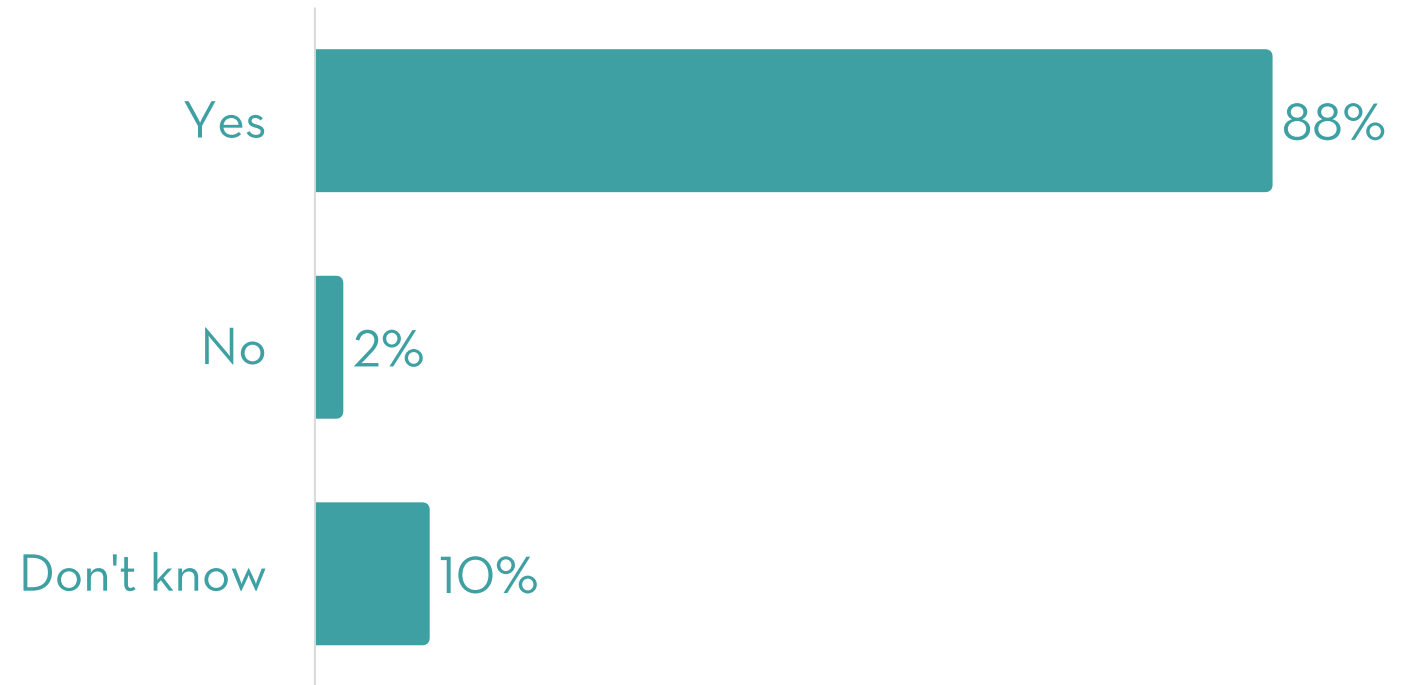
TRIP EXPERIENCE

- » **Over 2 in 5** visitors' expectations were **exceeded** on their visit to the Ocala/Marion County area



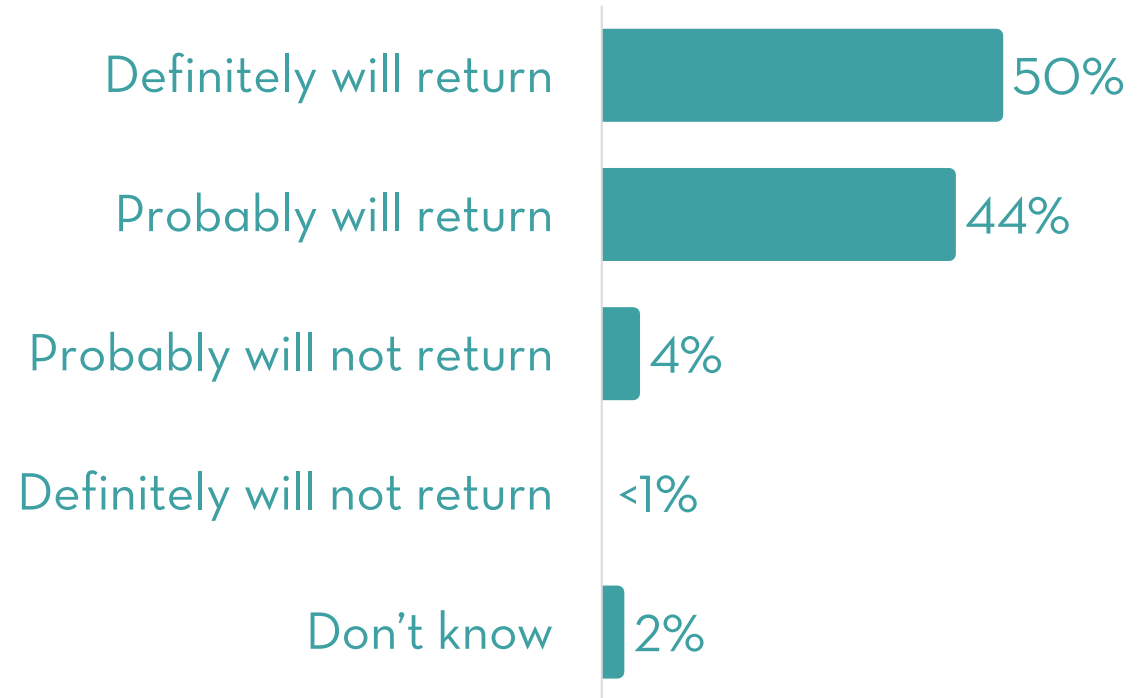
RECOMMENDATION

- » **Nearly 9 in 10** visitors **would recommend** the Ocala/Marion County area to others



LIKELIHOOD OF RETURNING

- » Nearly **all** visitors will **return** to the Ocala/Marion County area
- » Of visitors who will likely not return, a majority state **they prefer a variety in vacation spots**, or **there is not enough to do during the day**



2025 to 2024 COMPARISONS



PRE-VISIT

Visitor Metrics	July-Sept 2024	July-Sept 2025
<i>Ocala/Marion County was the only destination</i>	70%	74%
<i>Requested/downloaded the Visitors Guide</i>	8%	18%
<i>Visited or called the Visitors Center</i>	8%	9%
<i>Planned trip a month or less in advance</i>	52%	55%
<i>Average number of days trip was planned in advance of it being taken</i>	53	54
<i>Used OcalaMarion.com to plan their trip</i>	7%	6%
<i>Recalled Ocala/Marion County promotions</i>	23%	32%

PRE-VISIT

Reason for Visiting	July-Sept 2024	July-Sept 2025
<i>Visit friends/family</i>	24%	25%
<i>Horse-related event</i>	16%	17%
<i>Visit area springs</i>	14%	17%
<i>Relax/unwind</i>	12%	11%
<i>Sporting tournament/event</i>	15%	10%
<i>Business/conference</i>	9%	9%
<i>Canoeing/kayaking/tubing</i>	7%	7%
<i>Visit Downtown Ocala</i>	5%	6%
<i>Other horse-related activities</i>	5%	6%
<i>Special occasion</i>	4%	6%
<i>Go to restaurants</i>	5%	5%

Reason for Visiting	July-Sept 2024	July-Sept 2025
<i>Special event</i>	3%	5%
<i>Shopping/antiquing</i>	3%	4%
<i>Nature/birdwatching</i>	3%	4%
<i>Looking to move here</i>	2%	2%
<i>Biking/hiking/running</i>	2%	2%
<i>Fishing/hunting</i>	1%	2%
<i>Attraction</i>	1%	1%
<i>Art galleries/museums/culture</i>	2%	1%
<i>Go to bars/night clubs</i>	1%	1%
<i>Golf/tennis</i>	<1%	<1%
<i>Spas</i>	<1%	<1%
<i>Other</i>	8%	6%

TRAVEL PARTY PROFILE

Top Origin Markets	July-Sept 2024	July-Sept 2025
<i>Orlando - Daytona Beach - Melbourne</i>	16%	17%
<i>Tampa - St. Petersburg</i>	12%	10%
<i>Jacksonville</i>	10%	7%
<i>Miami - Ft. Lauderdale</i>	4%	6%
<i>Gainesville</i>	6%	5%
<i>West Palm Beach - Ft. Pierce</i>	5%	5%
<i>New York City*</i>	3%	4%
<i>Atlanta</i>	4%	3%

Top Origin States	July-Sept 2024	July-Sept 2025
<i>Florida</i>	61%	56%
<i>Georgia</i>	6%	4%
<i>New Jersey</i>	2%	3%
<i>New York</i>	2%	3%

Top Origin Regions	July-Sept 2024	July-Sept 2025
<i>Southeast (includes Florida)</i>	78%	73%
<i>Northeast</i>	10%	13%
<i>Midwest</i>	6%	8%
<i>West</i>	2%	2%
<i>International</i>	4%	4%

*New York City includes areas of New York, New Jersey, and Connecticut.

TRIP EXPERIENCE

Visitor Metrics	July-Sept 2024	July-Sept 2025
<i>Travel party</i>	2.9	2.8
<i>Children <18</i>	46%	45%
<i>Median age</i>	49	49
<i>Estimated median household income</i>	\$82,500	\$96,700
<i>1st time visitor</i>	31%	35%
<i>10+ visits to Ocala/Marion County</i>	22%	19%

Visitor Metrics	July-Sept 2024	July-Sept 2025
<i>Drove</i>	84%	81%
<i>Nights spent</i>	3.7	4.0
<i>Direct expenditures (entire trip)</i>	\$1,148	\$1,264

TRIP EXPERIENCE

Visitor Activities	July-Sept 2024	July-Sept 2025
<i>Go to restaurants</i>	54%	59%
<i>Visit friends/family</i>	39%	42%
<i>Visit area springs</i>	31%	33%
<i>Visit Downtown Ocala</i>	34%	33%
<i>Shopping/antiquing</i>	19%	28%
<i>Relax/unwind</i>	27%	27%
<i>Horse-related event</i>	25%	23%
<i>Nature/birdwatching</i>	16%	19%
<i>Business/conference</i>	12%	12%
<i>Canoeing/kayaking/tubing</i>	15%	12%
<i>Sporting tournament/event</i>	10%	11%
<i>Other horse-related activities</i>	17%	11%

Visitor Activities	July-Sept 2024	July-Sept 2025
<i>Special occasion</i>	7%	10%
<i>Go to bars/night clubs</i>	8%	8%
<i>Biking/hiking/running</i>	7%	7%
<i>Special event</i>	6%	6%
<i>Looking for a second home/place to retire</i>	4%	6%
<i>Art galleries/museums/cultural events</i>	6%	6%
<i>Fishing/hunting</i>	4%	5%
<i>Golf/tennis</i>	4%	5%
<i>Attraction</i>	4%	4%
<i>Spas</i>	3%	3%
<i>Other</i>	5%	6%

POST TRIP EVALUATION

Satisfaction Metrics	July-Sept 2024	July-Sept 2025
<i>Visit Met + Exceeded expectations</i>	99%	100%
<i>Will return to Ocala/Marion County</i>	97%	94%
<i>Will recommend Ocala/Marion County</i>	94%	88%

Ocala/MARION COUNTY VCB

Economic Impact Study & Visitor Tracking Report Jul – Sep 2025

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