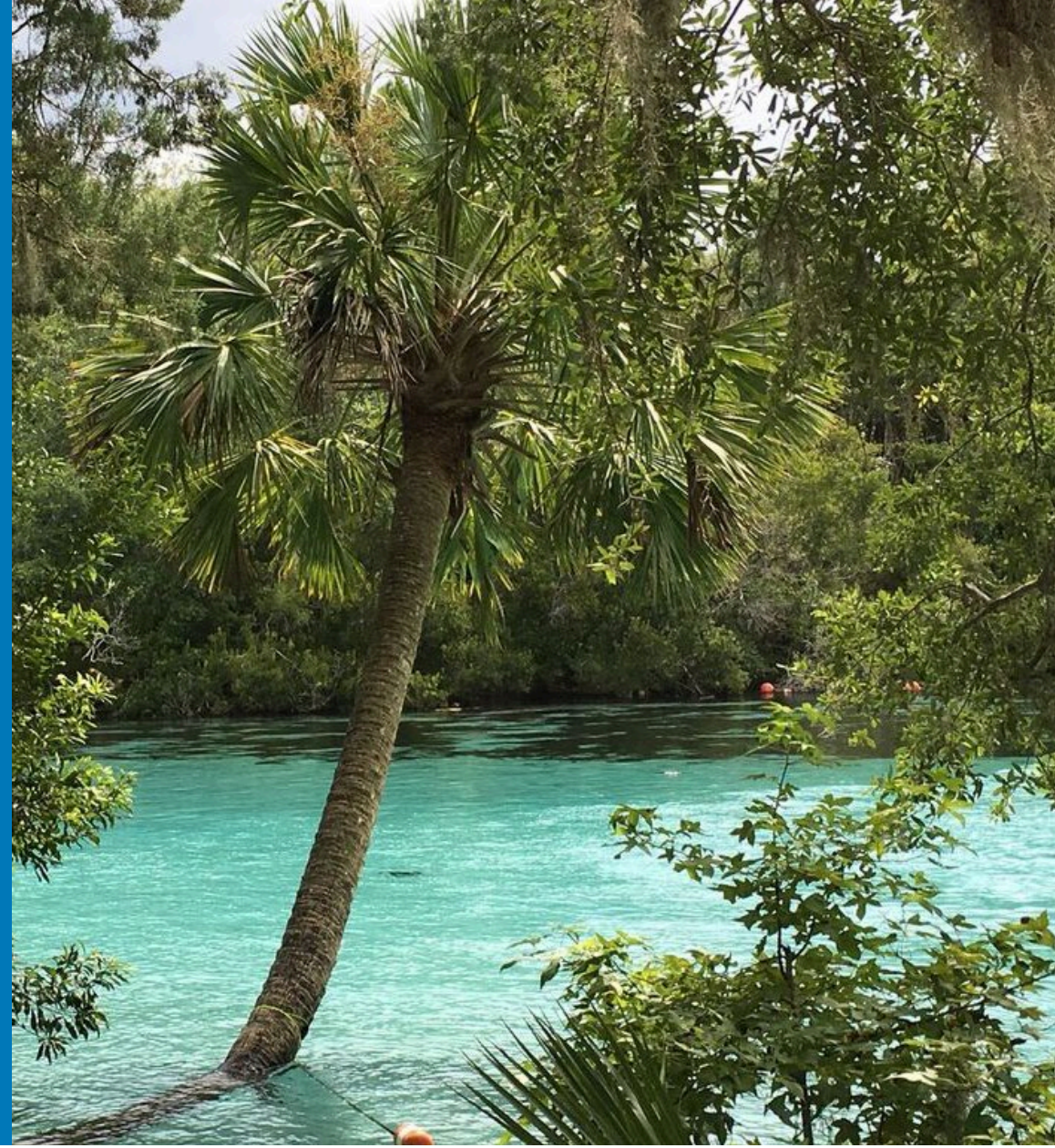


# Ocala/MARION COUNTY VCB

Economic Impact Study &  
Visitor Tracking Report  
Apr - June 2024



# STUDY OBJECTIVES: VISITOR JOURNEY



- Planning cycle
- Planning sources
- Reasons for visiting
- Recall of destination messaging

- Visitor origin
- Party size
- Party composition
- Demographics
- Number of visits to the area

- Mode of transportation
- Accommodations
- Booking
- Length of stay
- Activities in destination
- Visitor spending

- Satisfaction of Ocala/Marion County area
- Likelihood of returning
- Evaluation of destination attributes
- Painting a picture for others

- Number of visitors
- Expenditures
- Room nights generated
- Occupancy, ADR, RevPAR



# METHODOLOGY

## Visitor Tracking Study

- » Interviews were completed in person and online with 952 visitors at local hotels, attractions, and events between April 1, 2024 and June 30, 2024



## Partner & Event Involvement

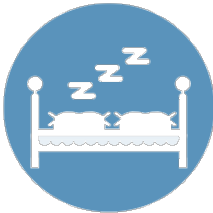
- » Appleton Museum of Art
- » KP Hole Park
- » Silver Springs State Park
- » HDG Hotels
- » Hampton Inn and Suites
- » Circle Square Cultural Center
- » MCA & Brick City Center for the Arts
- » Canyon Zipline & Adventure Park
- » Santos Bike Shop
- » WEC
- » FAST Aquatic Center

# EXECUTIVE SUMMARY





# APR - JUN 2024 TOURISM SNAPSHOT



**58.7%**

**OCCUPANCY  
RATE**



**\$119.90**

**AVERAGE DAILY  
RATE**



**\$70.38**

**REVENUE PER AVAILABLE  
ROOM**

2024 vs. 2023

↑ 0.5%

↑ 2.6%

↑ 3.1%

- » A slight increase in occupancy (+0.5% points) along with an increase in available units resulted in an increase in the number of visitors (+1.0% points).
- » Nights in destination increased from 3.1 nights on average to 3.4 nights on average compared to Apr-Jun 2023.
- » The percentage of visitors only visiting Ocala/Marion County increased compared to Apr-Jun 2023 (+6% points).
- » The percentage of visitors staying in paid accommodations increased compared to Apr-Jun 2023 (+6% points).

# VISITOR JOURNEY: ECONOMIC IMPACT



# VISITOR & LODGING METRICS

Visitor Statistics <sup>1</sup>	Apr - June 2023	Apr - June 2024	Percent Change
Visitors	392,200	396,100	+ 1.0%
Direct Expenditures <sup>2</sup>	\$160,377,100	\$161,313,600	+ 0.6%
Total Economic Impact	\$248,203,900 <sup>3</sup>	\$243,077,200 <sup>3</sup>	- 2.1%
Lodging Statistics <sup>4</sup>	Apr - June 2023	Apr - June 2024	Percent Change
Occupancy	58.4%	58.7%	+ 0.5%
Room Rates	\$116.83	\$119.90	+ 2.6%
RevPAR	\$68.27	\$70.38	+ 3.1%
Room Nights	253,900	283,600	+ 11.7%
TDT Collections	\$1,477,001	\$1,598,991	+ 8.3%

<sup>1</sup> Visitor statistics continued to level out in Apr-Jun in a trend seen across the state. With more domestic visitors traveling abroad, people returning to cruises, etc., metrics are normalizing.

<sup>2</sup> Includes spending for: accommodations, restaurants, entertainment, shopping, transportation, groceries, and “other” expenses.

<sup>3</sup> Multiplier decreased from 1.55 in Apr-Jun 2023 to 1.51 in Apr-Jun 2024.

<sup>4</sup> Lodging figures utilize accommodation metrics from STR, Key Data, and the Florida Department of Business and Professional Regulation (DBPR).

# VISITOR JOURNEY: PRE-VISIT





# TRIP PLANNING CYCLE

- » **Over 2 in 5** visitors planned their trips to the Ocala/Marion County area **a month or less in advance**
- » Visitors planned their trip **on average 73 days in advance of their visit**



# TOP TRIP PLANNING SOURCES\*



**45%** Talk to friends and family

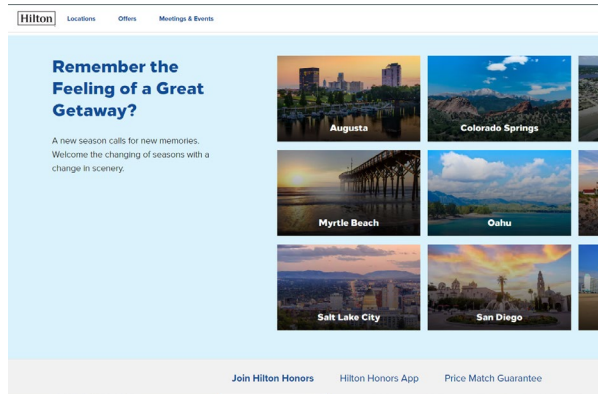


**40%** Search sites



**13%** Personal social media

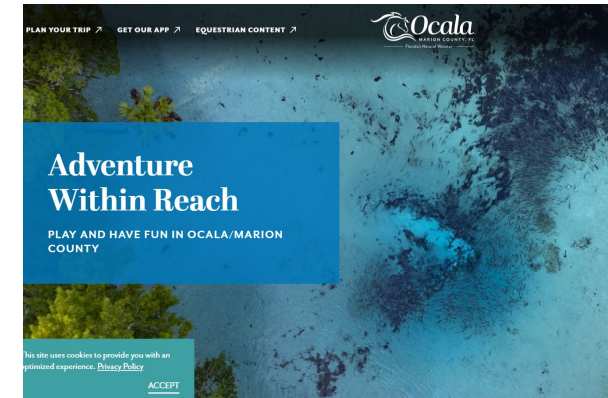
**12%** Visit Ocala/Marion County social media



**11%** Hotel/resort website/app



**11%** Trip planning website/app



**6%** OcalaMarion.com



# TOP REASONS FOR VISITING\*



**30%** Visit friends/relatives



**16%** Visit area springs



**14%** Attend horse shows, sales, events



**12%** Relax/unwind



**9%** Sporting tournament/event



**9%** Visit Downtown Ocala



# PRE-TRIP RECALL OF ADVERTISING

- » **27%** of visitors recalled advertising about the Ocala/Marion County area
- » **Over half** of visitors who recalled advertising were influenced by this information to visit the area (represents **15% of all visitors**)



# SOURCES OF ADVERTISING RECALL\*

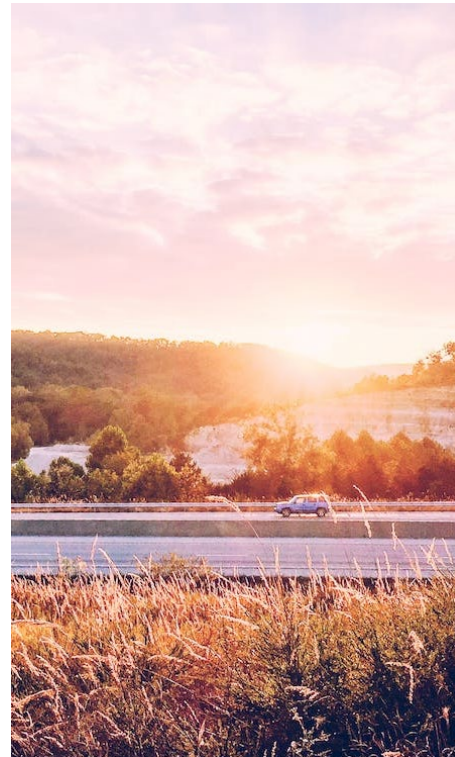
Base: **27%** of visitors who recalled advertising



**30%** Social media



**24%** Online advertisement



**17%** Billboard



**14%** Television



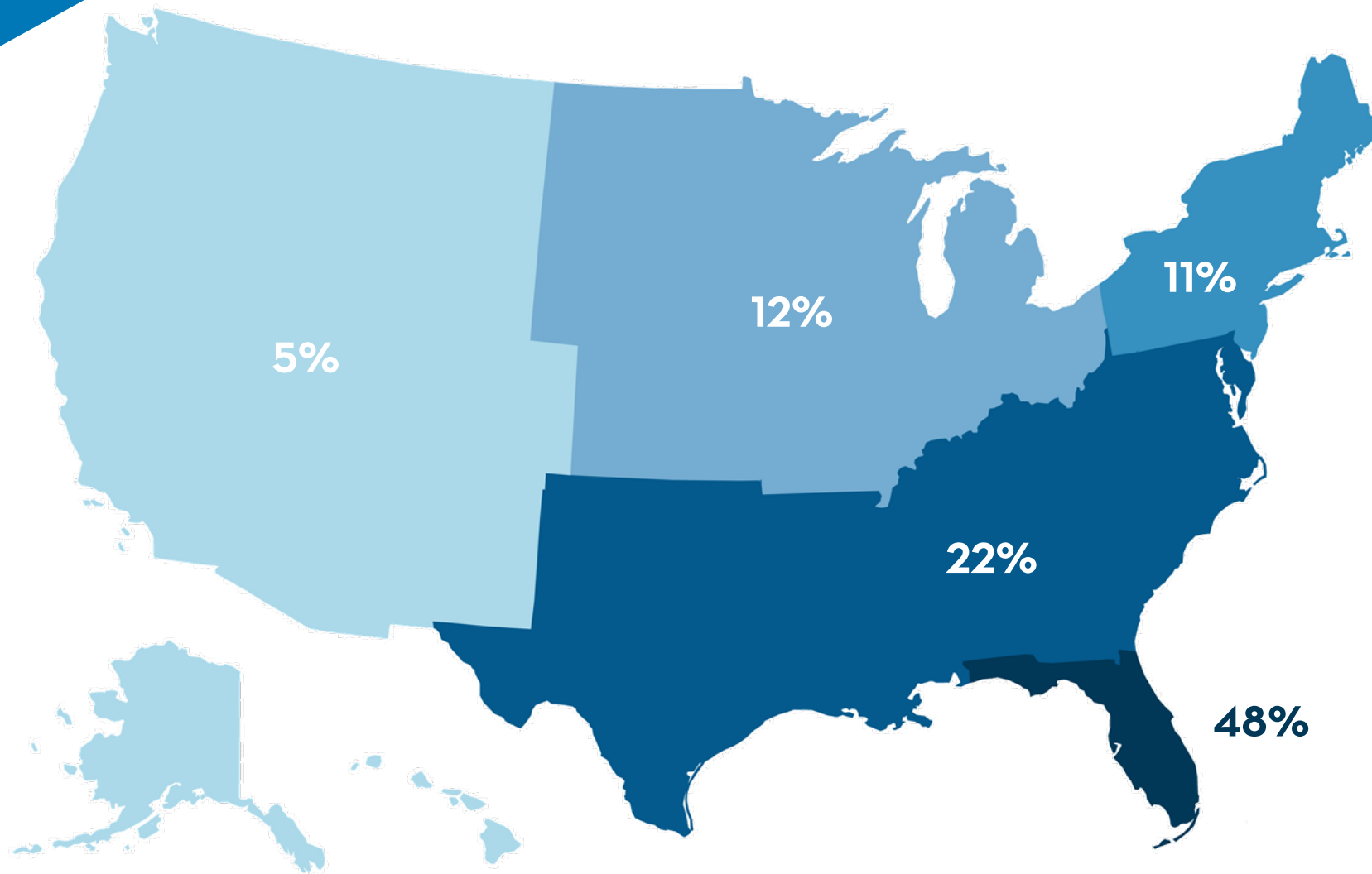
**12%** Print advertisement

# VISITOR JOURNEY: TRAVEL PARTY PROFILE



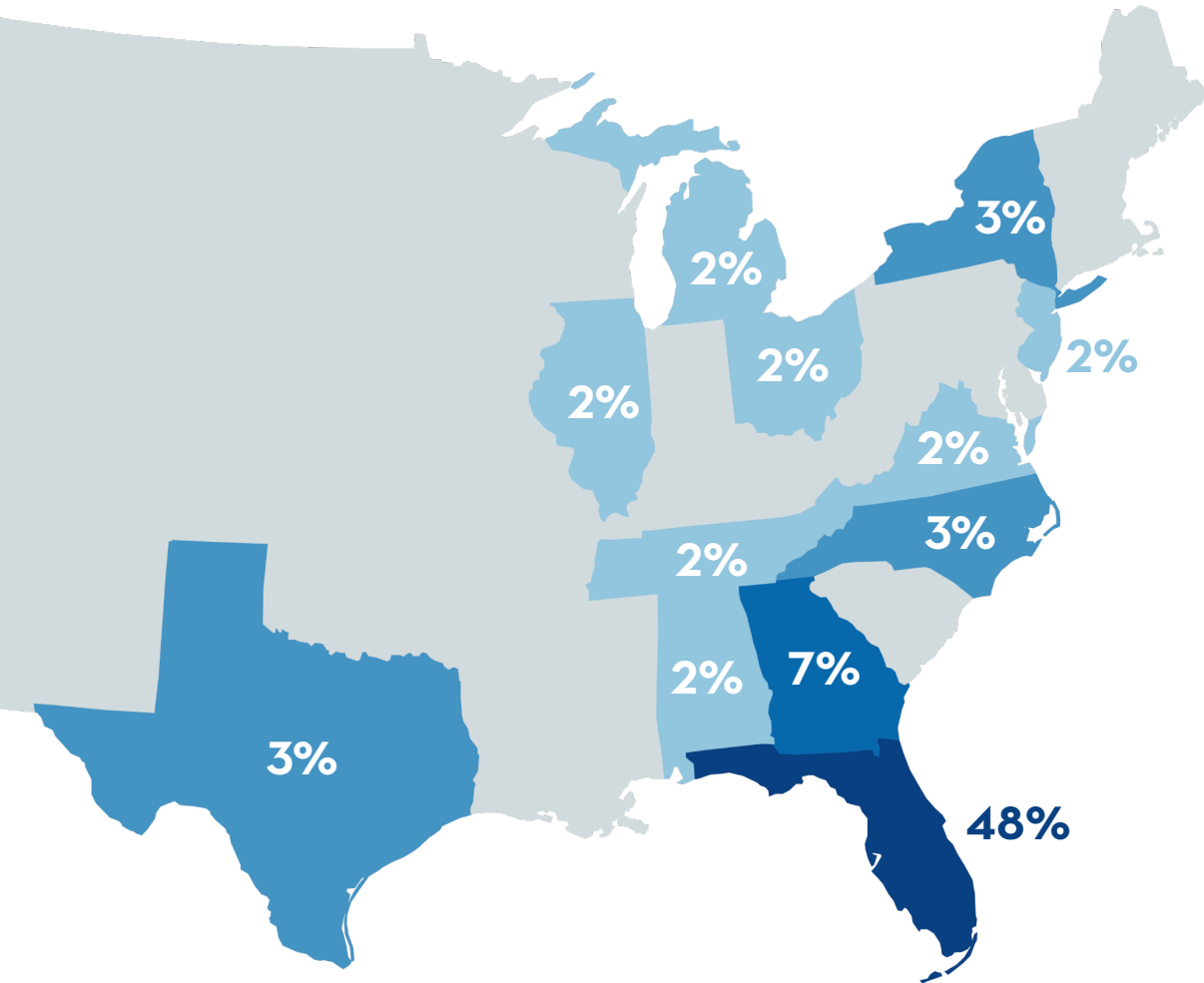


# REGIONS OF ORIGIN

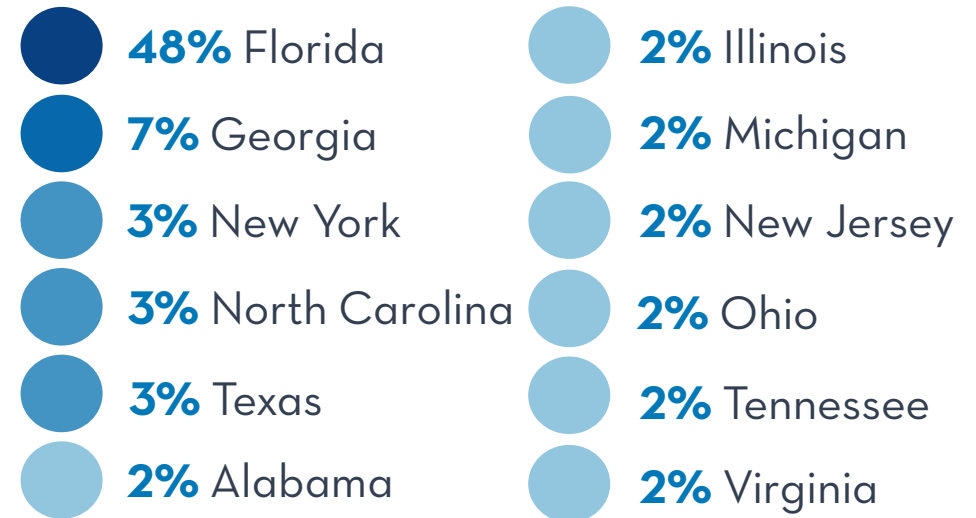


**2%** of visitors traveled to the Ocala/Marion County area from outside of the U.S.

# TOP STATES OF ORIGIN



**Nearly 4 in 5** visitors traveled to Ocala/Marion County from 12 states:



# TOP ORIGIN MARKETS



**12%** Orlando - Daytona  
Beach - Melbourne



**11%** Tampa - St. Petersburg



**5%** Atlanta



**5%** Jacksonville



**5%** Miami - Ft. Lauderdale



**4%** Gainesville



**4%** New York City\*

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



# TRAVEL PARTIES

» The typical visitor traveled in a party size of **2.9** people



» **36%** traveled with at least one person under the age of 18



# VISITOR PROFILE

- » The typical Ocala/Marion County area visitor:
  - » Is **50** years old
  - » Has a household income of **\$80,300** per year





# NEW & RETURNING VISITORS

- » **3 in 10** were first time visitors to the Ocala/Marion County area
- » **2 in 10** visitors were loyalists, having visited over 10 times





# VISITOR JOURNEY: TRIP EXPERIENCE



# TRANSPORTATION

- » **81%** of visitors **drove** to the Ocala/Marion County area
- » **13%** of visitors flew via the **Orlando International Airport**



# VISITOR BEHAVIOR

- » Typical visitors spent **3.4** nights in Ocala/Marion County area\*
- » **Nearly 3 in 4** visitors were only visiting Ocala/Marion County during their trip

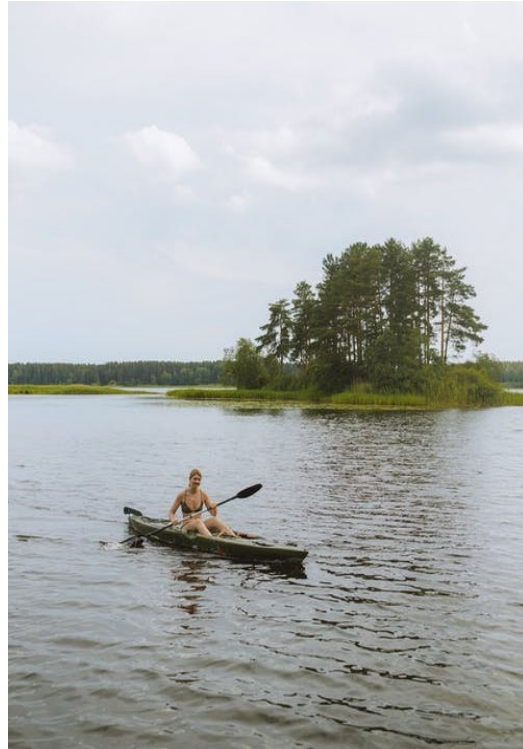




# TOP ACCOMMODATIONS



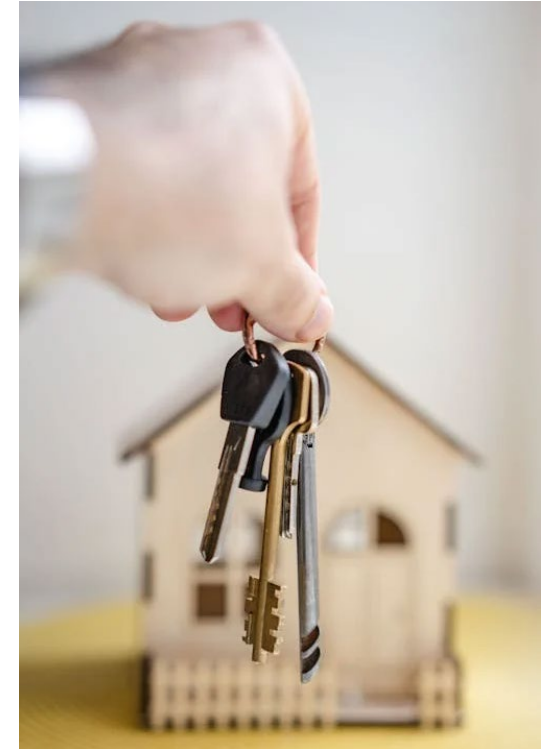
**45%** Hotel/motel/resort



**28%** Day tripper



**11%** Friends' or relatives' home



**6%** Vacation rental home\*



# TOP ACTIVITIES DURING VISIT\*



**49%** Dining out



**41%** Visit family/friends



**33%** Visit area springs



**31%** Visit Downtown Ocala



**28%** Relax & unwind



**20%** Attend horse shows, sales, events



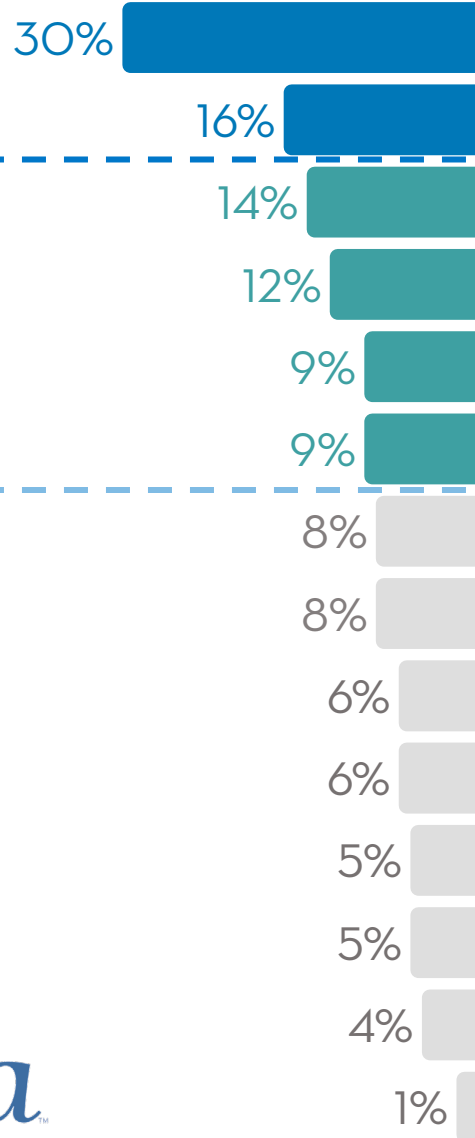
**20%** Shopping



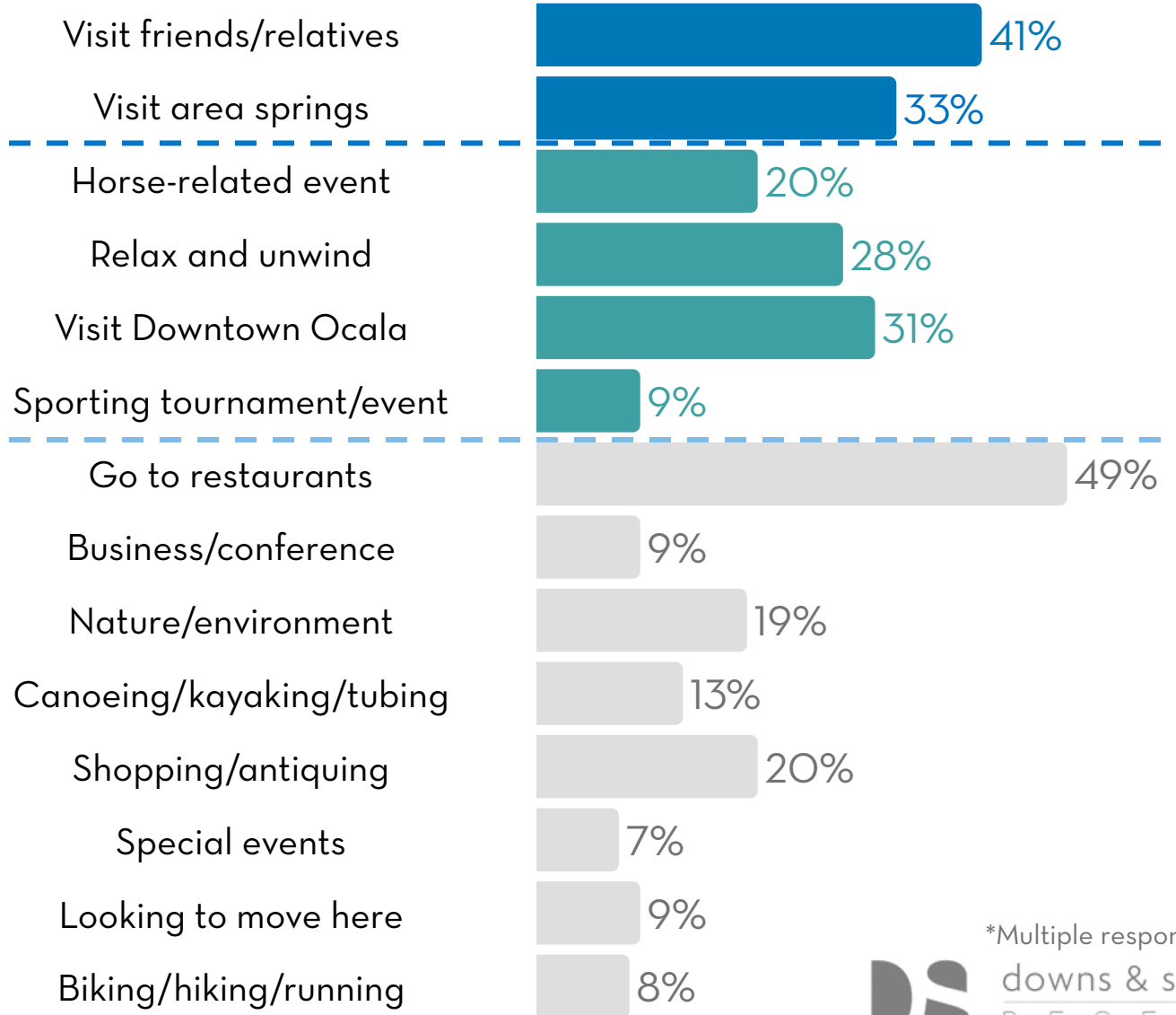
**19%** Nature/environment

# ACTIVITIES VS. REASON FOR VISIT\*

## Reason for Visiting

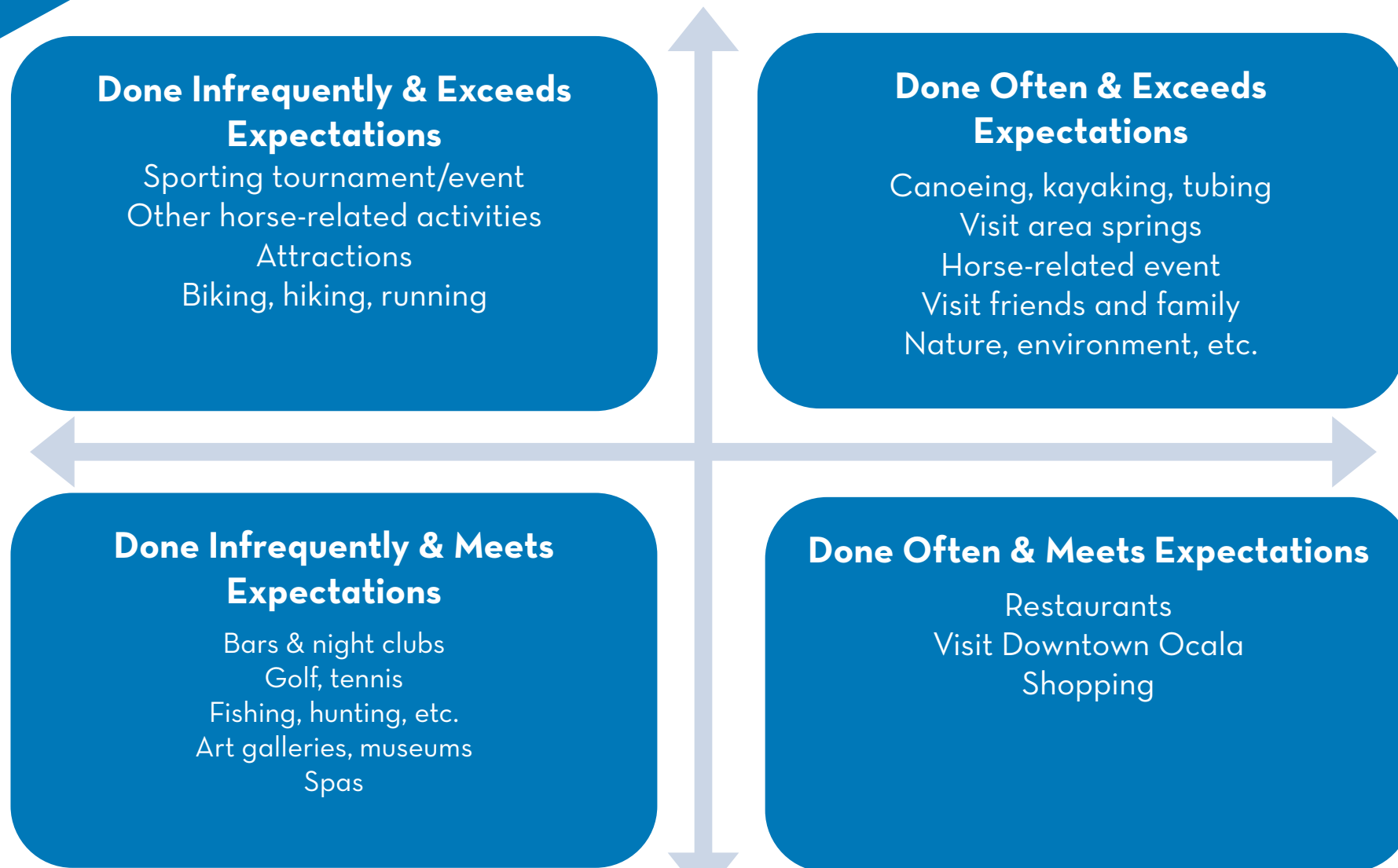


## Visitor Activities





# QUADRANT ANALYSIS



# TRAVEL PARTY SPENDING

- » Travel parties spent **\$315** per day and **\$1,070** during their trip



# VISITOR JOURNEY: POST-TRIP





# VISITOR SATISFACTION

- » **99%** of visitors said their visit met or exceeded expectations (**42%** exceeded expectations)
- » **91%** will recommend Ocala/Marion County to a friend
- » **96%** will return to Ocala/Marion County (**62%** will definitely return)



# AREA DESCRIPTIONS



*"Great place to canoe or kayak; waters are clear and beautiful."*



*"You absolutely have to check out this area. It's beautiful with plenty to do and wonderful restaurants."*



*"If you want to enjoy nature, horses, and open space, come here!"*



# DETAILED FINDINGS



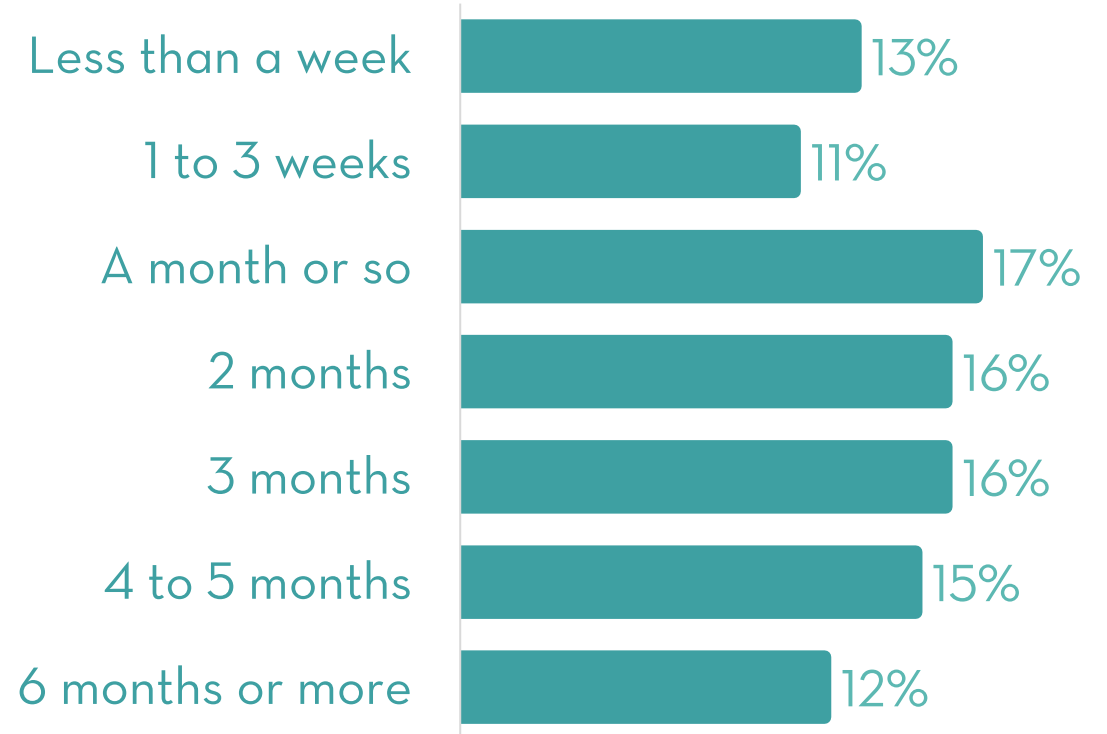


# VISITOR JOURNEY: PRE-VISIT



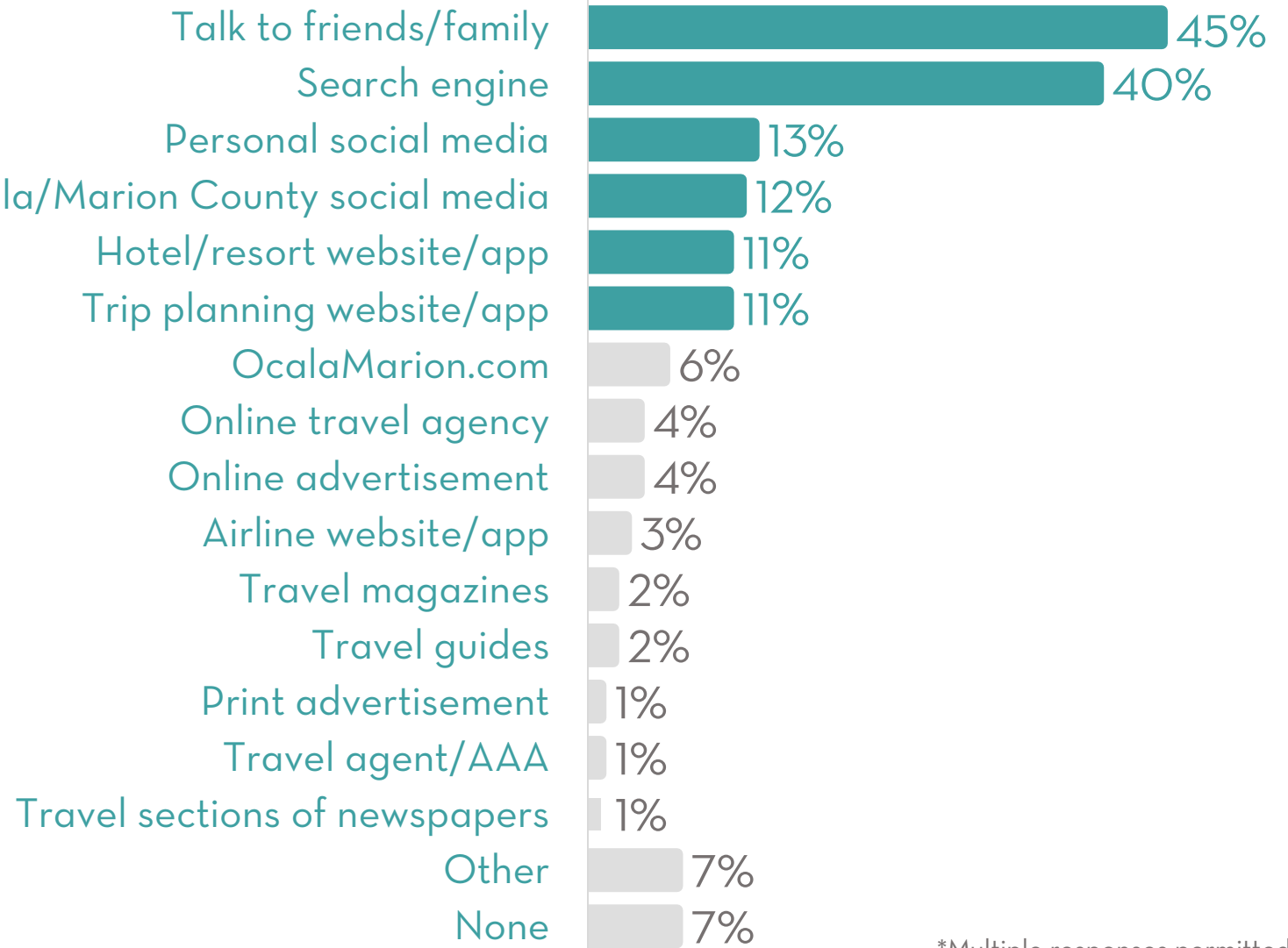
# TRIP PLANNING CYCLE

- » **Over 2 in 5** visitors planned their trips to the Ocala/Marion County area **a month or less in advance**
- » On the other hand, **over 2 in 5** visitors planned their trips **at least 3 months in advance**
- » Visitors planned their trip **on average 73 days in advance**



# TRIP PLANNING SOURCES\*

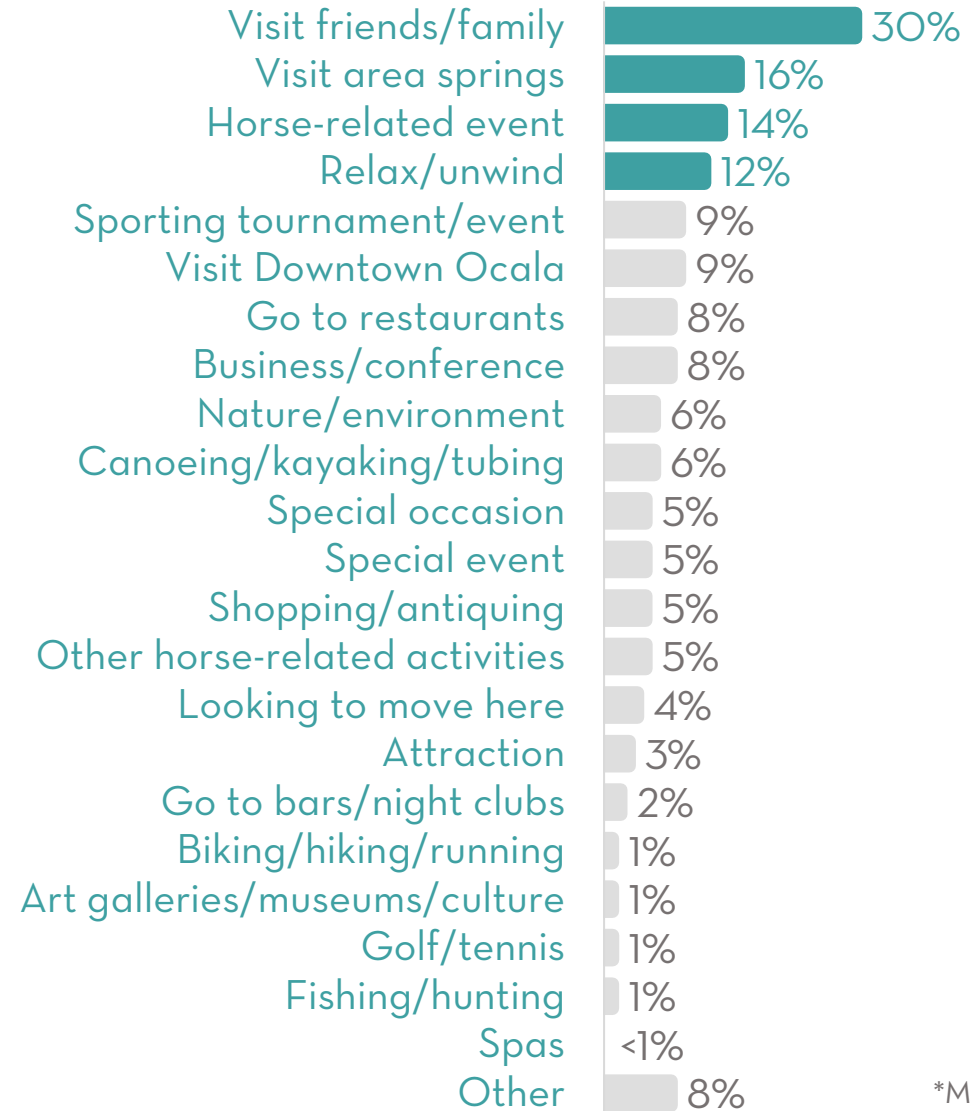
- » **Talking to friends** and **search engines (i.e., Google)** are the **top planning sources** for trips to Ocala/Marion County
- » **6%** of visitors went to Ocala/Marion County's website to plan their trip





# REASONS FOR VISITING\*

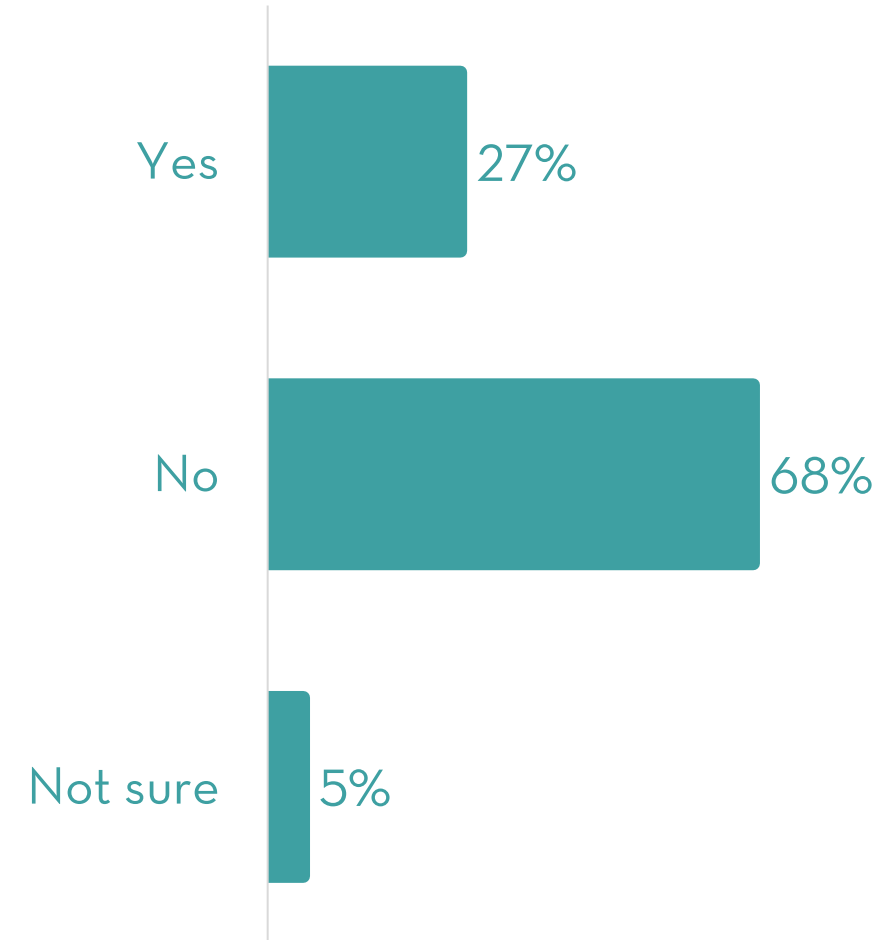
- » **Visiting friends and relatives** is the **number one** reason for visiting as **3 in 10** visitors came to Ocala/Marion County for this reason
- » **Over 1 in 10** visitors came to Ocala/Marion County for **the area springs, horse-related events, and to relax/unwind**



# RECALL OF ADVERTISING

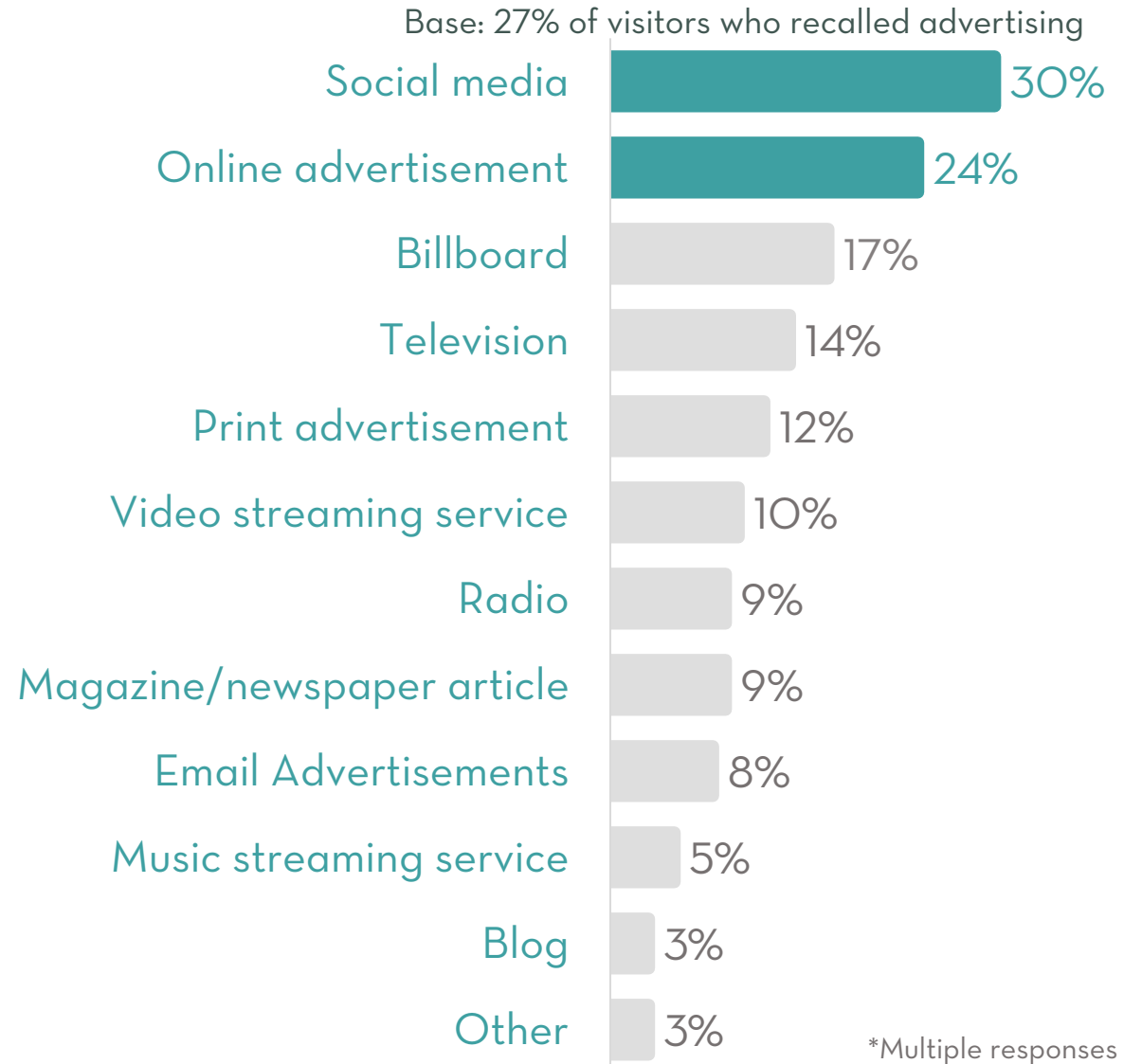
- » **Over 1 in 4** visitors recalled advertising about the Ocala/Marion County area
- » Of the visitors who recalled advertising, **55% (represents 15% of all visitors)** were influenced by this information to come to the area

## Recalled Advertising



# ADVERTISING SOURCE\*

» **3 in 10** visitors who recalled advertising for the Ocala/Marion County area recalled advertisements on **social media** and nearly **1 in 4** visitors recalled **online advertisements**



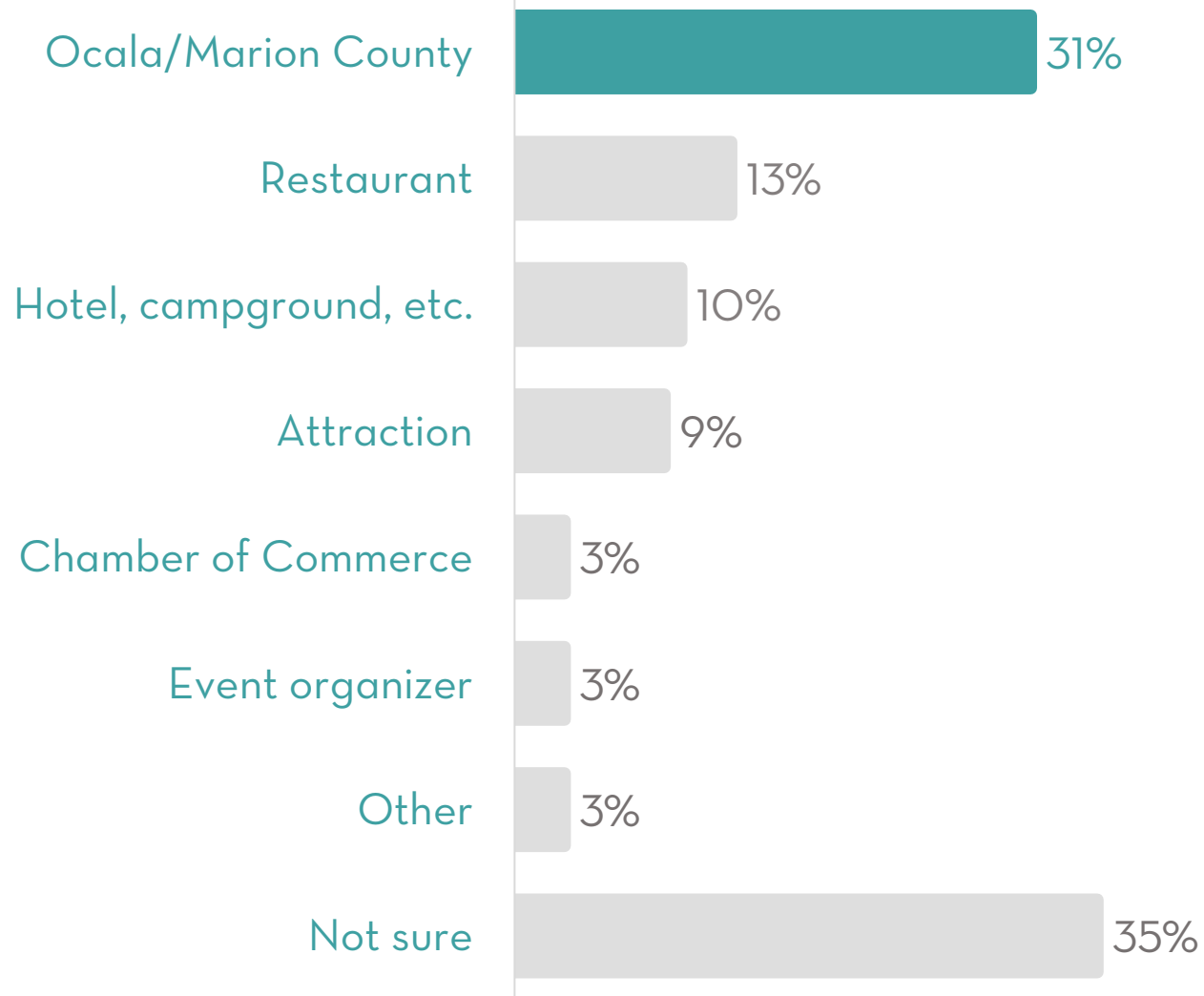
\*Multiple responses permitted



# SPONSORED ADVERTISEMENT\*

- » **Over 3 in 10** visitors who recalled advertising for the Ocala/Marion County area recall **Ocala/Marion County** as a sponsor of the advertisement
- » **Nearly 1 in 10** visitors stated that they recalled advertisements sponsored by a **restaurant; hotel, campground, etc.; or an attraction**

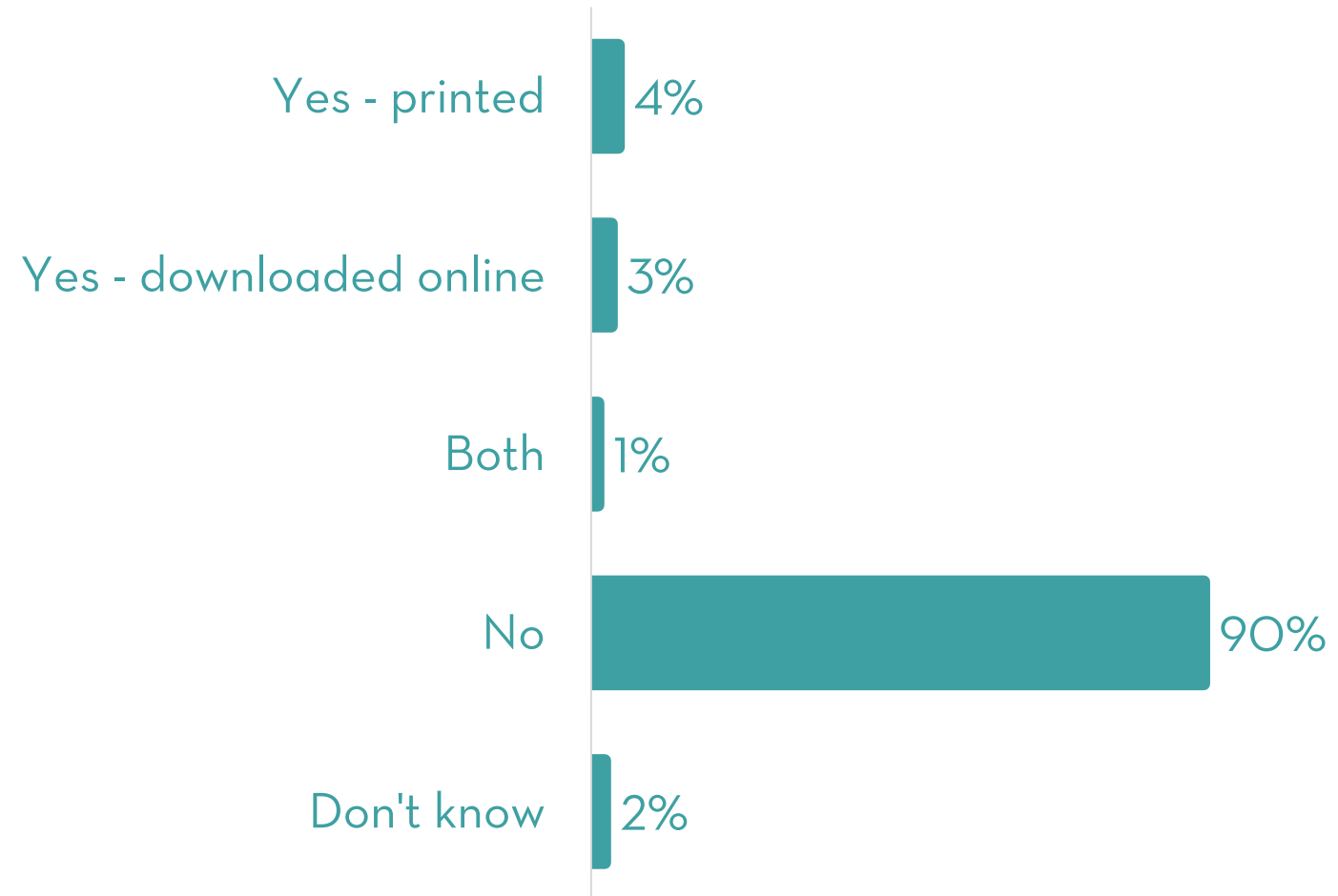
Base: 27% of visitors who recalled advertising



\*Multiple responses permitted.

# VISITOR GUIDE

- » **8%** of visitors viewed the **print and/or online visitor guide**
- » Usefulness Rating: **8.5 out of 10\***

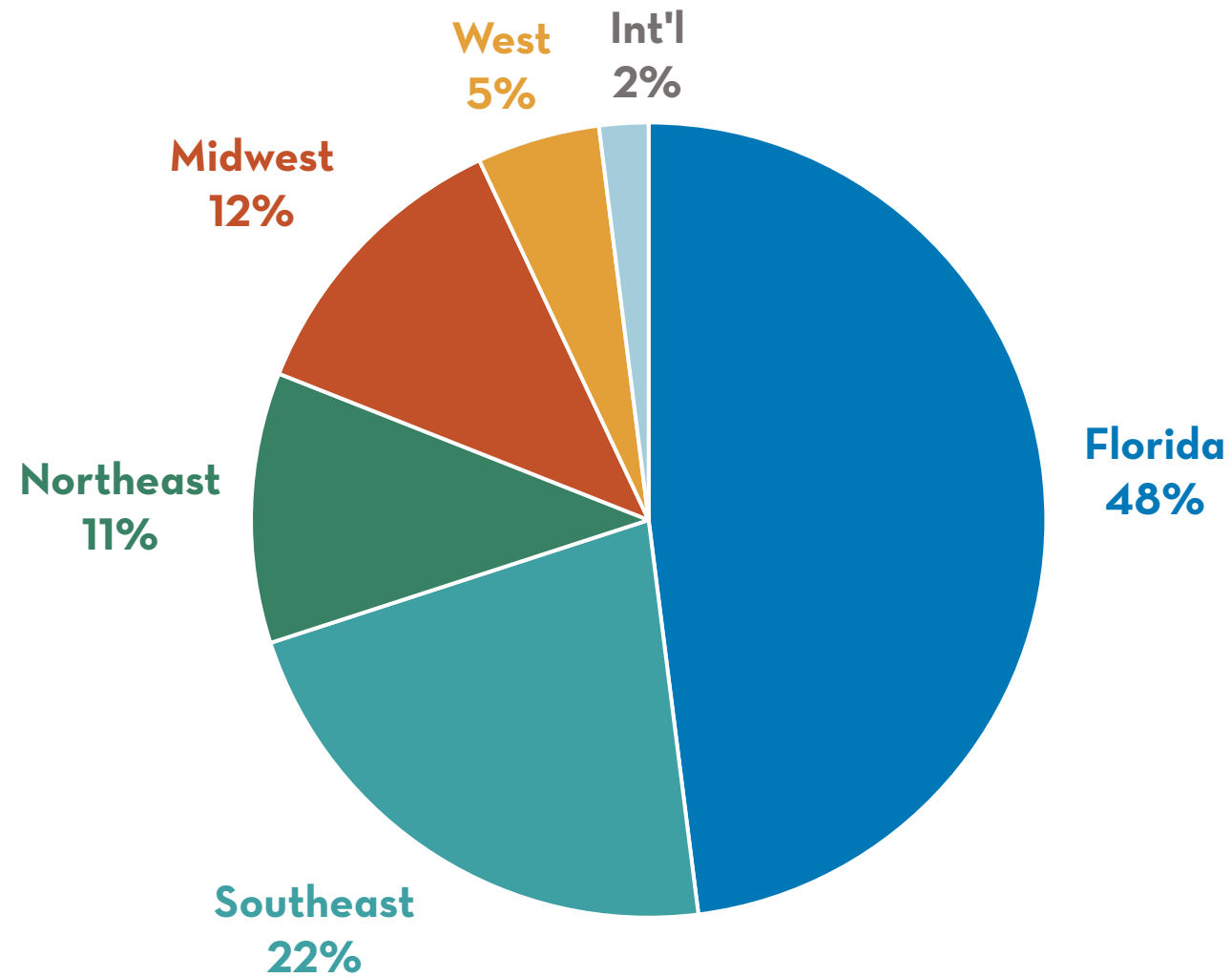


# VISITOR JOURNEY: TRAVEL PARTY PROFILE





# REGION OF ORIGIN



# TOP ORIGIN STATES

- » **Nearly 4 in 5** visitors came to Ocala/Marion County from 12 states
- » **Florida** and **Georgia** were key origin states for the Ocala/Marion County area

State	Percent
Florida	48%
Georgia	7%
New York	3%
North Carolina	3%
Texas	3%
Alabama	2%
Illinois	2%
Michigan	2%
New Jersey	2%
Ohio	2%
Tennessee	2%
Virginia	2%

# TOP ORIGIN MARKETS

- » **Orlando-Daytona Beach-Melbourne, Tampa-St. Peterburg, Atlanta, Jacksonville, and Miami-Fort Lauderdale** were key origin markets this quarter
- » **Florida markets** dominated the top markets for Ocala/Marion County

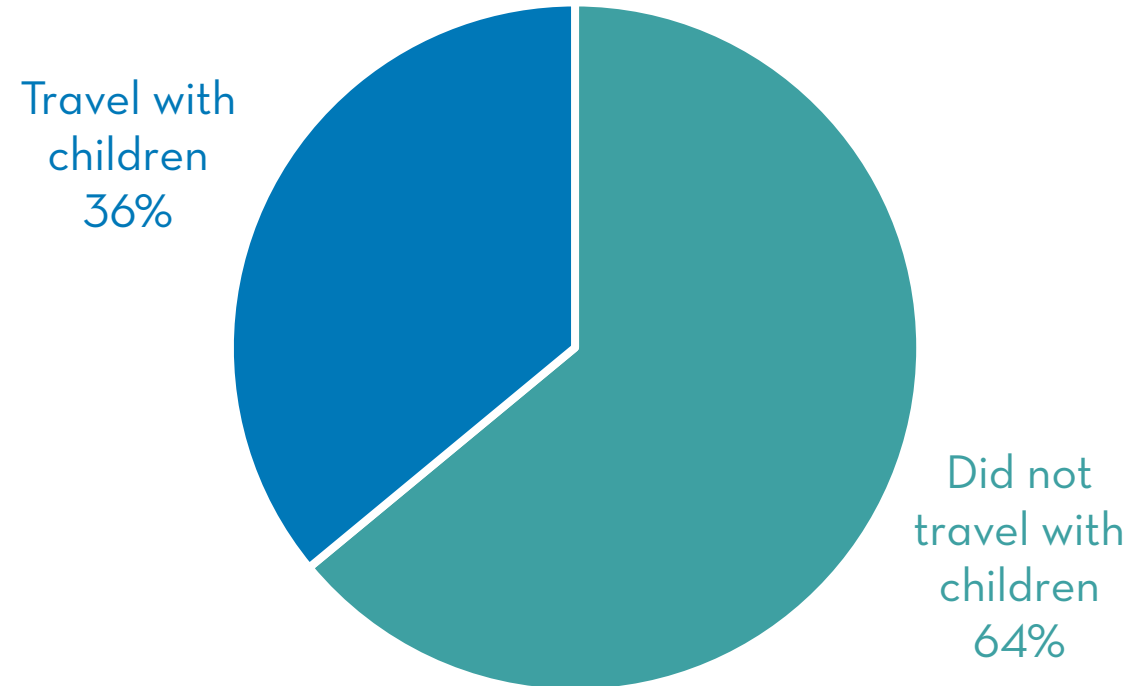
Market	Percent
Orlando-Daytona Beach-Melbourne	12%
Tampa-St. Petersburg	11%
Atlanta	5%
Jacksonville	5%
Miami-Fort Lauderdale	5%
Gainesville	4%
New York City*	4%
West Palm Beach-Ft. Pierce	3%
Chicago	2%
Fort Myers-Naples	2%
Philadelphia	2%
Tallahassee-Thomasville	2%

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

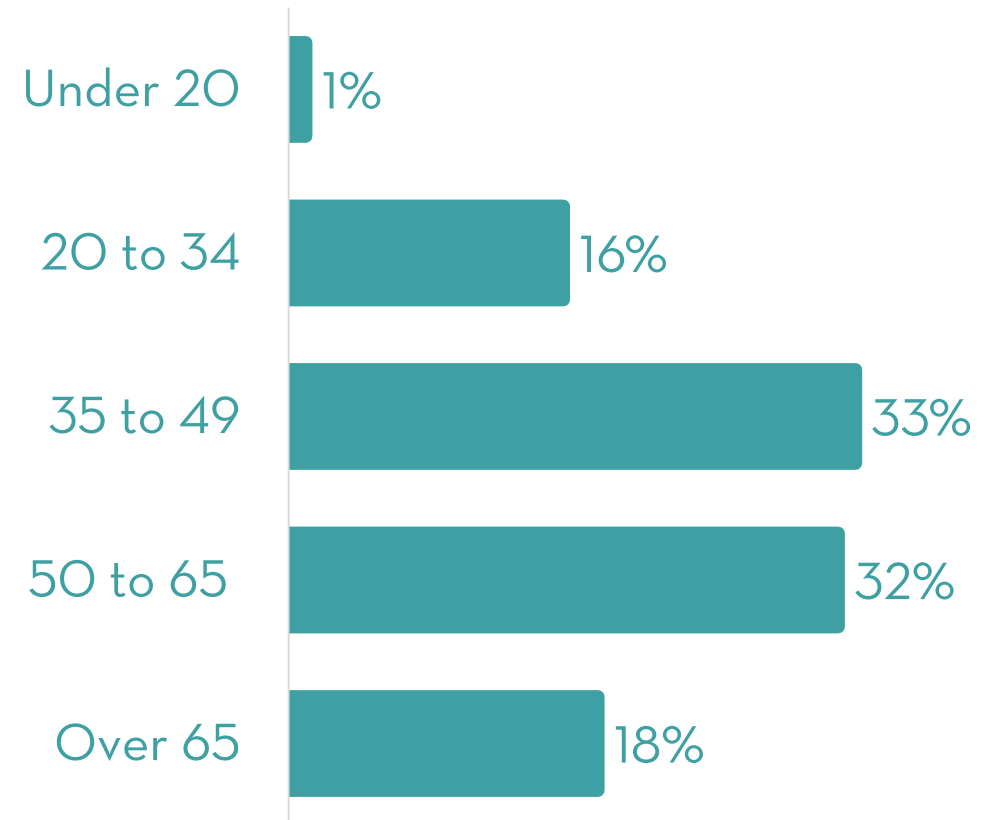


# TRAVEL PARTIES

- » The typical travel party size was **2.9** people
- » **Nearly 2 in 5** travel parties included children under the age of 18

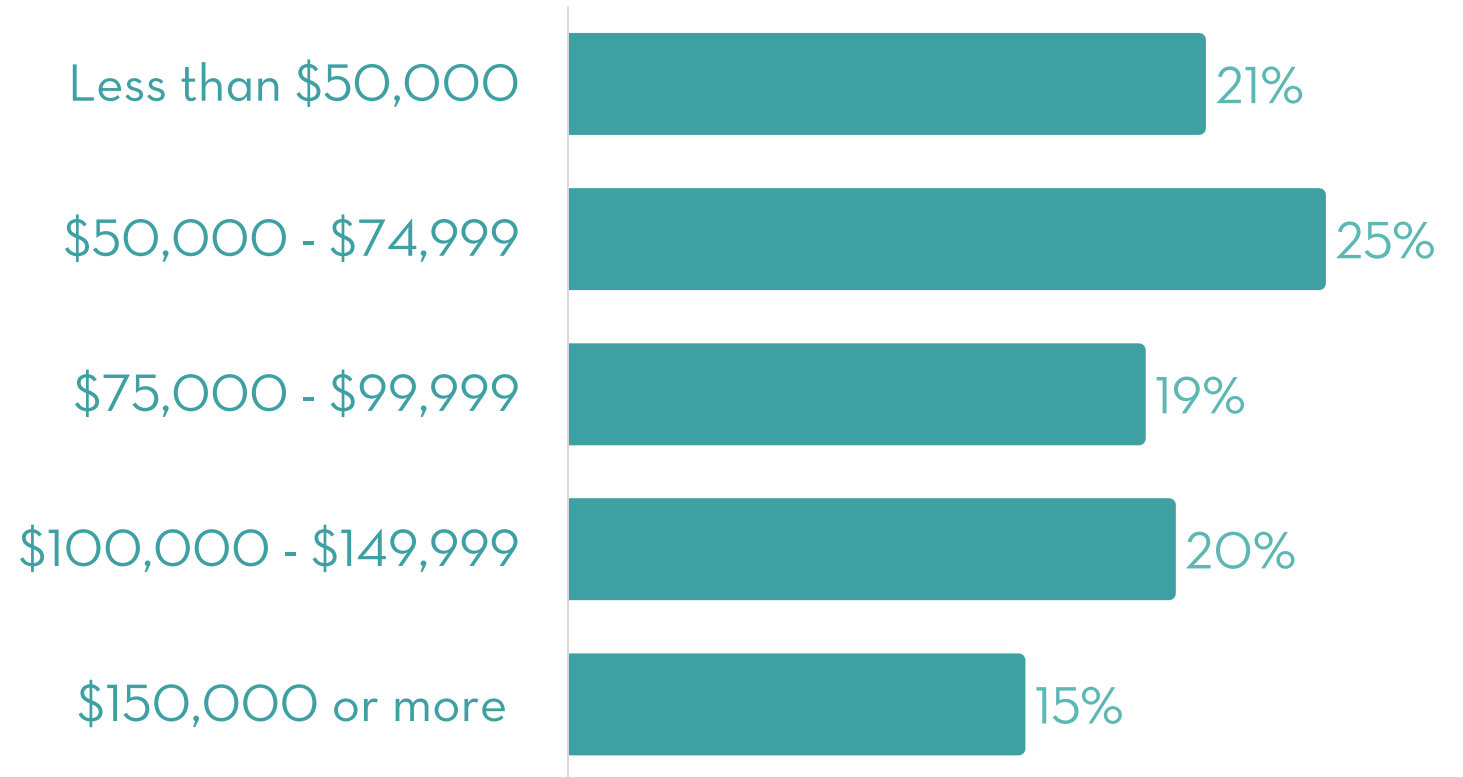


» The median age of visitors to the Ocala/Marion County area was **50**



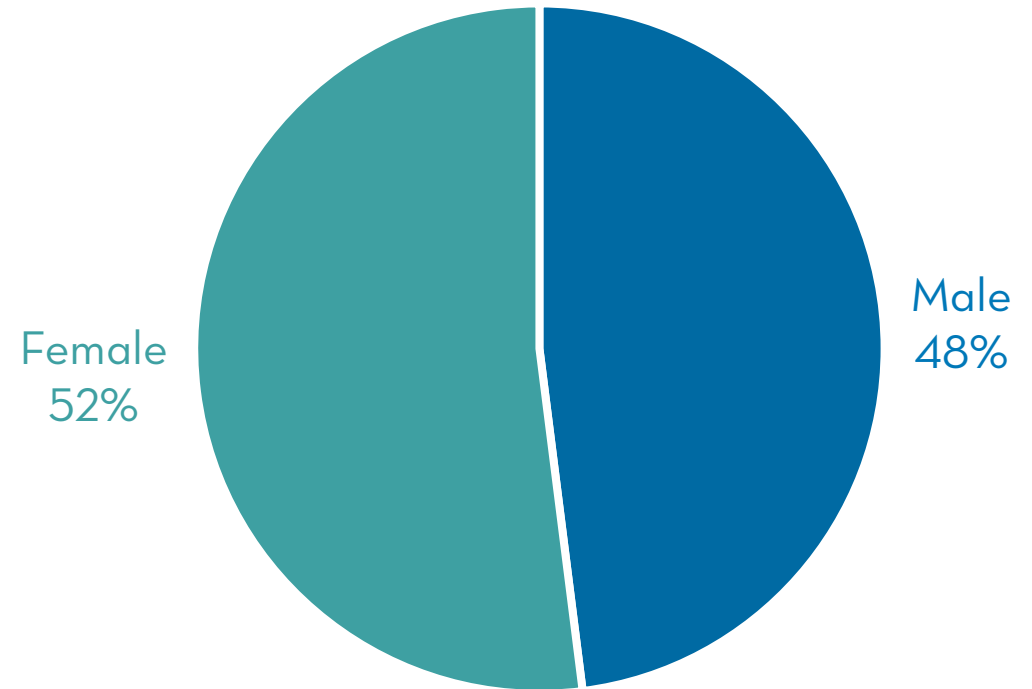
# HOUSEHOLD INCOME

- » Visitors to the Ocala/Marion County area had a median household income of **\$80,300** per year
- » **Over 3 in 10** visitors had household incomes over **\$100,000**



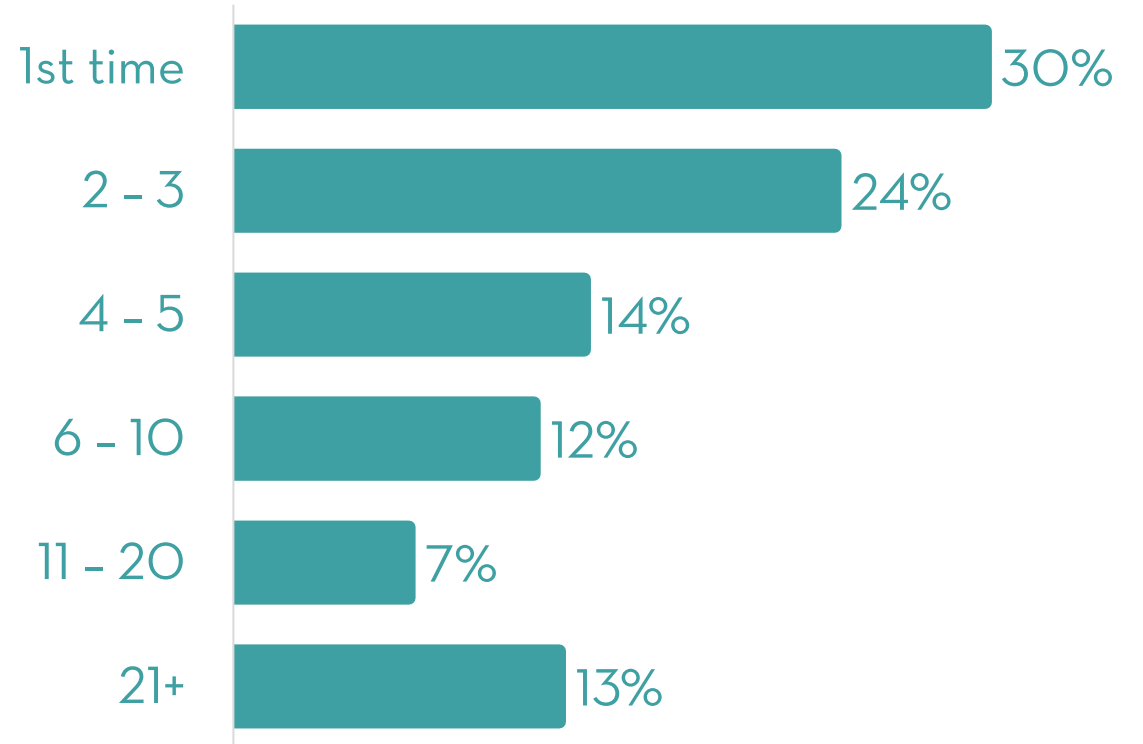


» **52%** of visitors interviewed were **female**



# NEW & RETURNING VISITORS

- » **3 in 10** visitors said **this was their first time visiting** the Ocala/Marion County area
- » **2 in 10** visitors were loyalists, having visited over 10 times



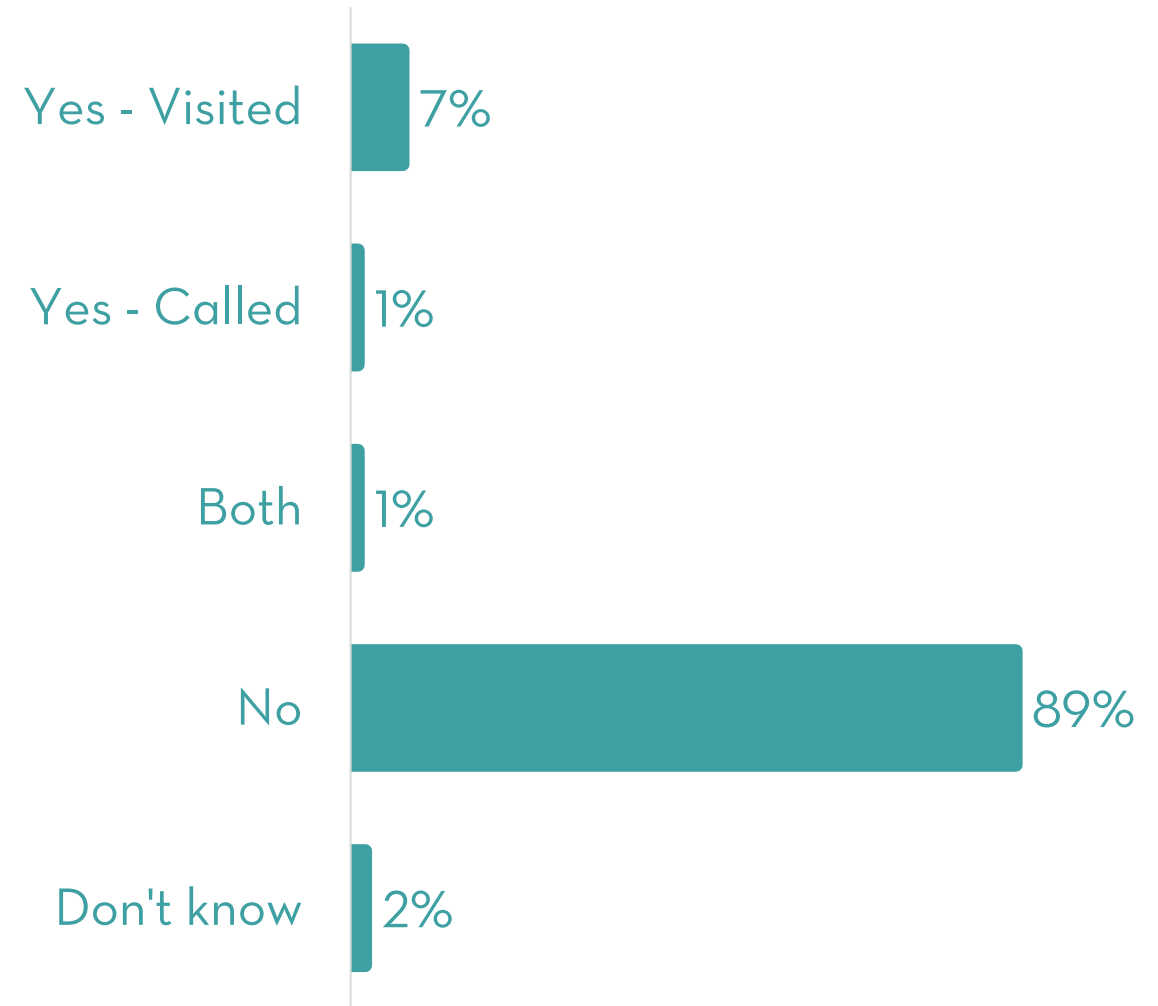
# VISITOR JOURNEY: TRIP EXPERIENCE





# VISITOR CENTER

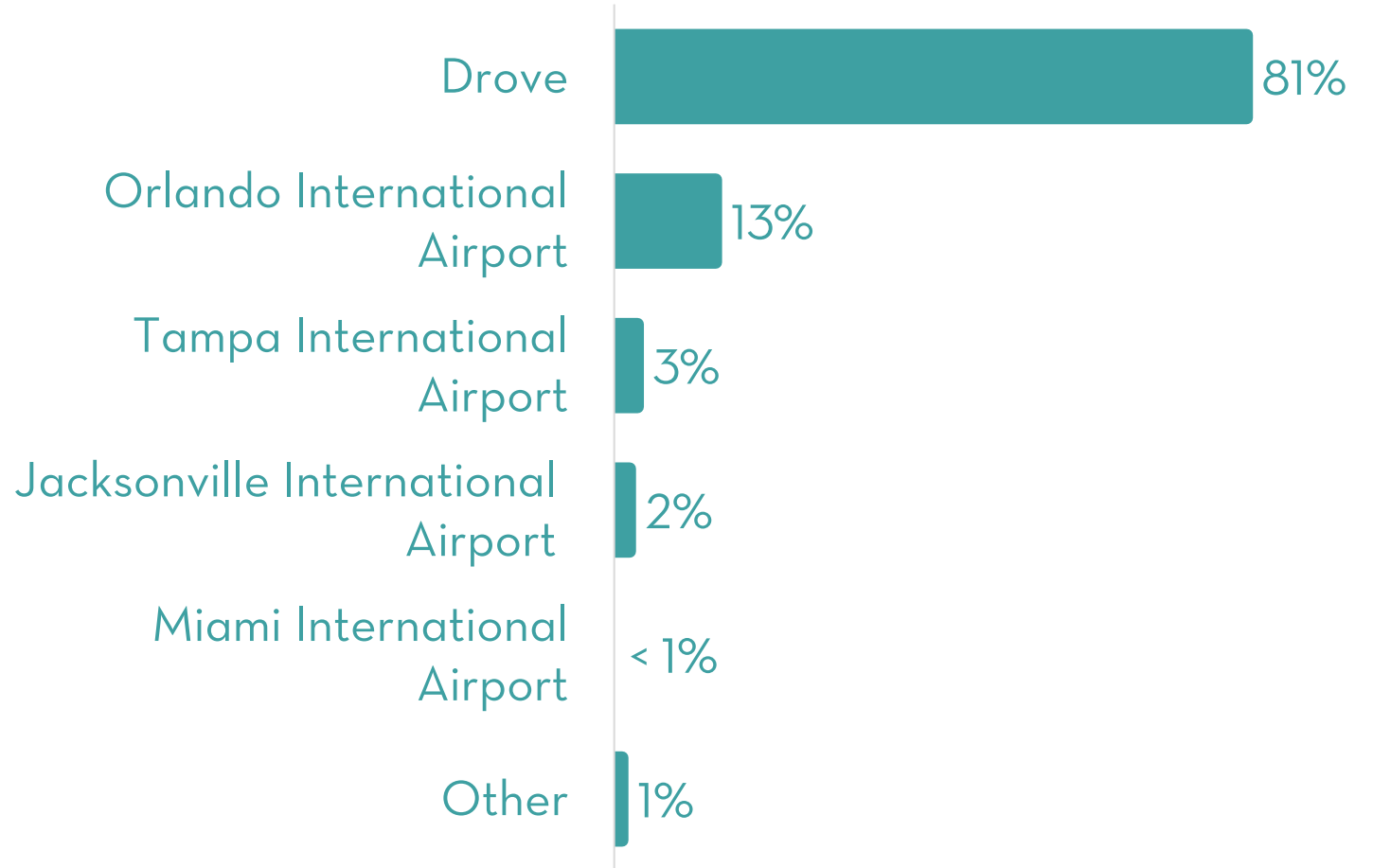
- » **8%** of visitors **stopped at the Visitor Center**
- » Usefulness Rating: **8.7 out of 10\***



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

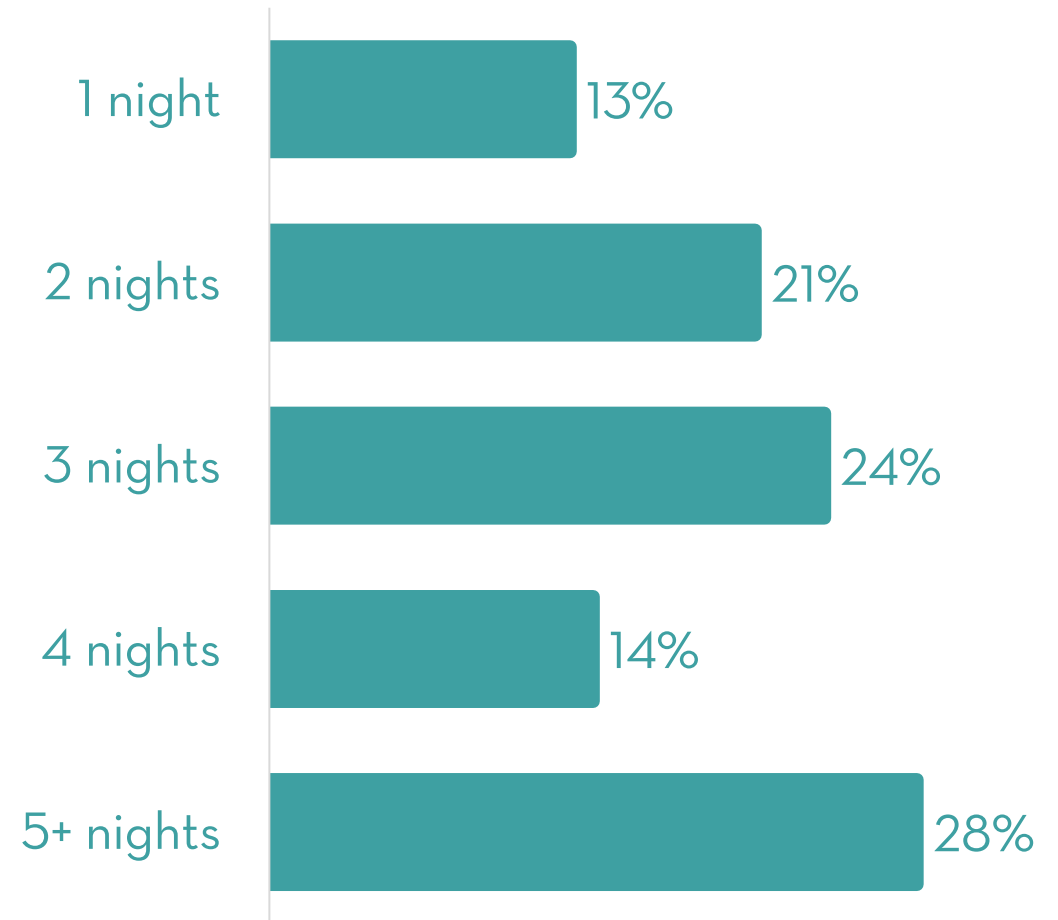
# TRANSPORTATION

- » **81%** of visitors **drove** to the Ocala/Marion County area for their trip
- » **13%** of **all** visitors used the **Orlando International Airport**



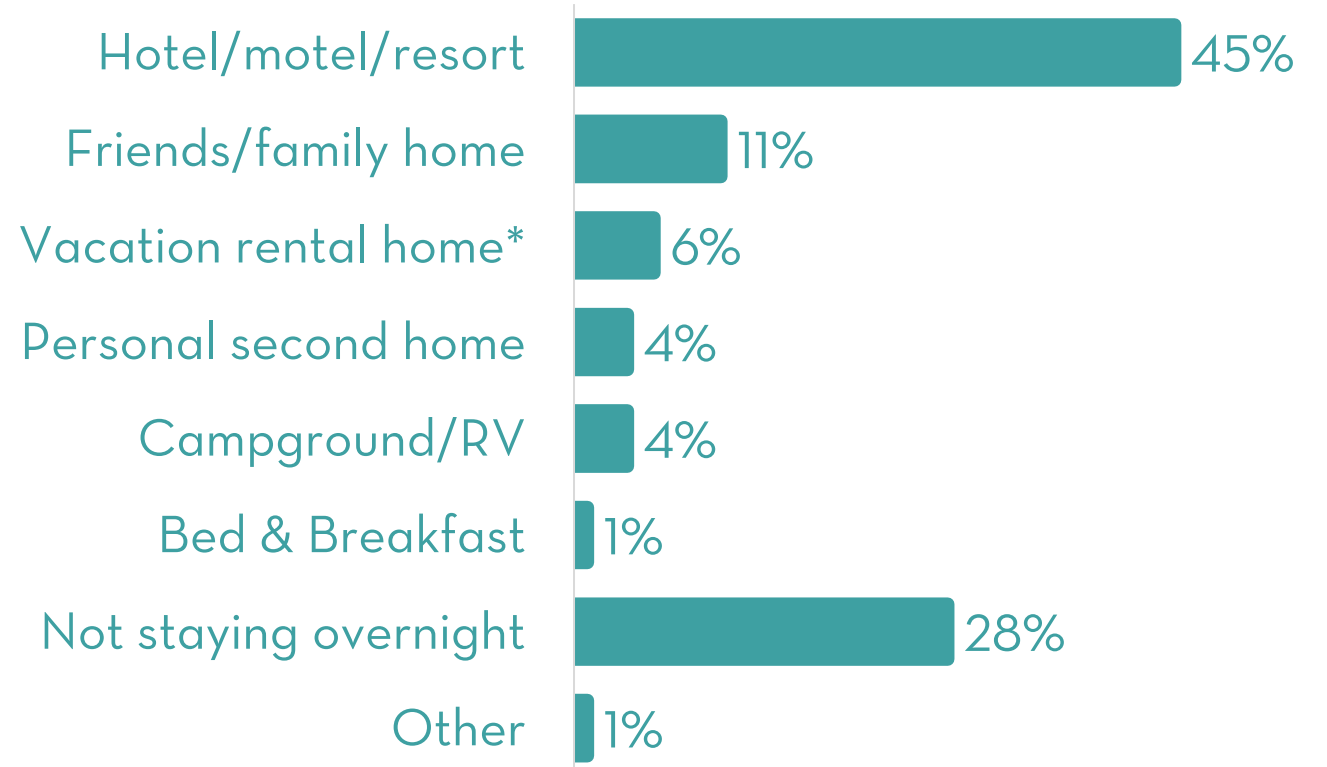
# NIGHTS

- » Visitors stayed **3.4** nights in Ocala/Marion County\*
- » Visitors staying in paid accommodations stayed **3.5** nights in the Ocala/Marion County area



# ACCOMMODATIONS

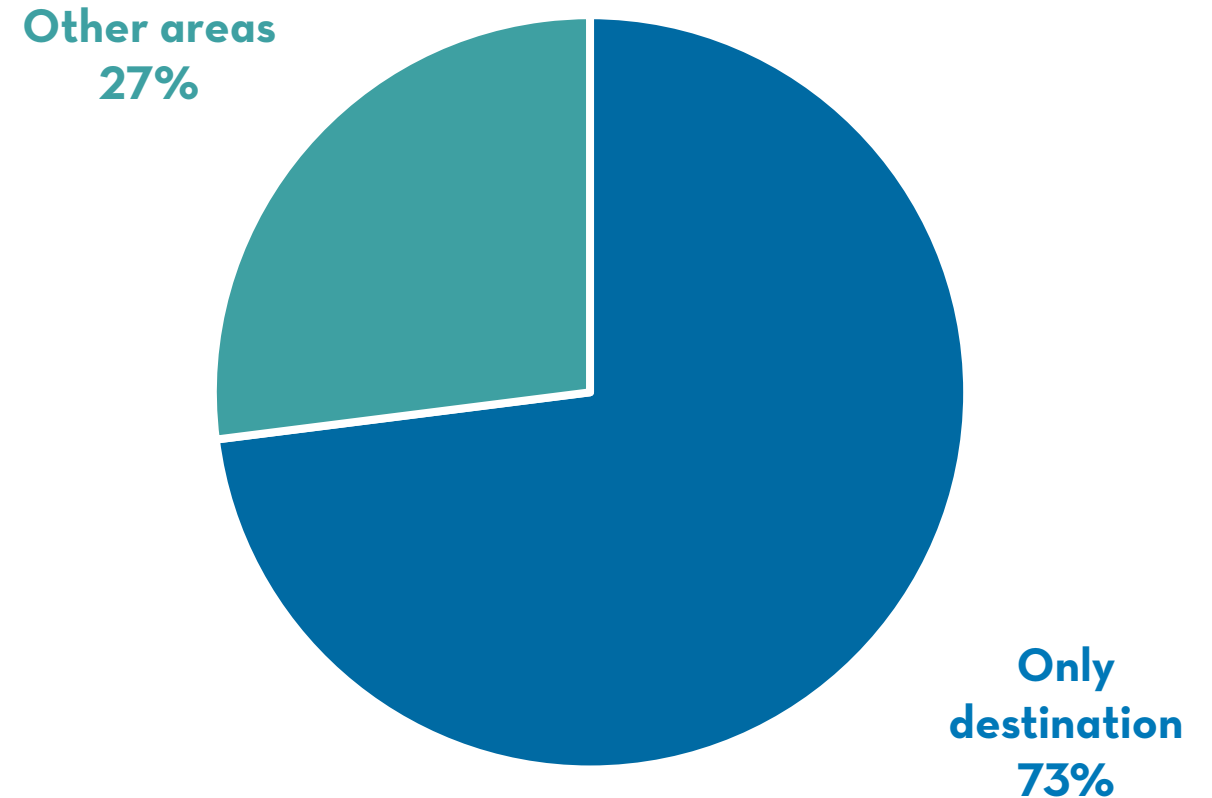
» **Over 2 in 5** visitors stayed overnight in a **hotel, motel, or resort**





# VISITING OTHER AREAS

- » **Over 1 in 4** visitors were also visiting other destinations on their trip



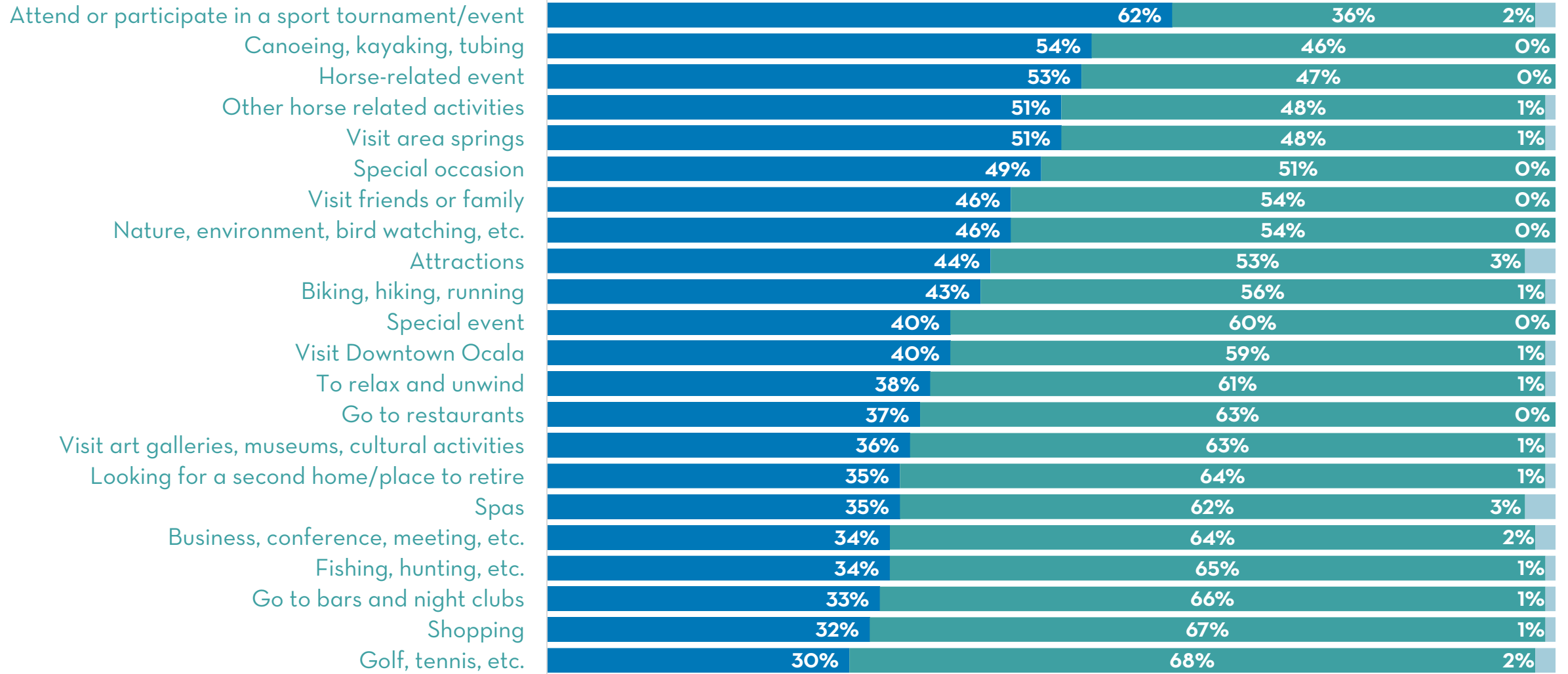
# VISITOR ACTIVITIES\*

- » **Going to restaurants** is the number one activity, as **nearly half** of visitors went out to eat
- » **Over 2 in 5** visitors visited **friends and family**
- » **About 3 in 10** visitors came to Ocala for **the area springs, Downtown Ocala, and to relax/unwind**
- » **About 1 in 5** visitors came to Ocala for **horse-related events, shopping, and nature/birdwatching**



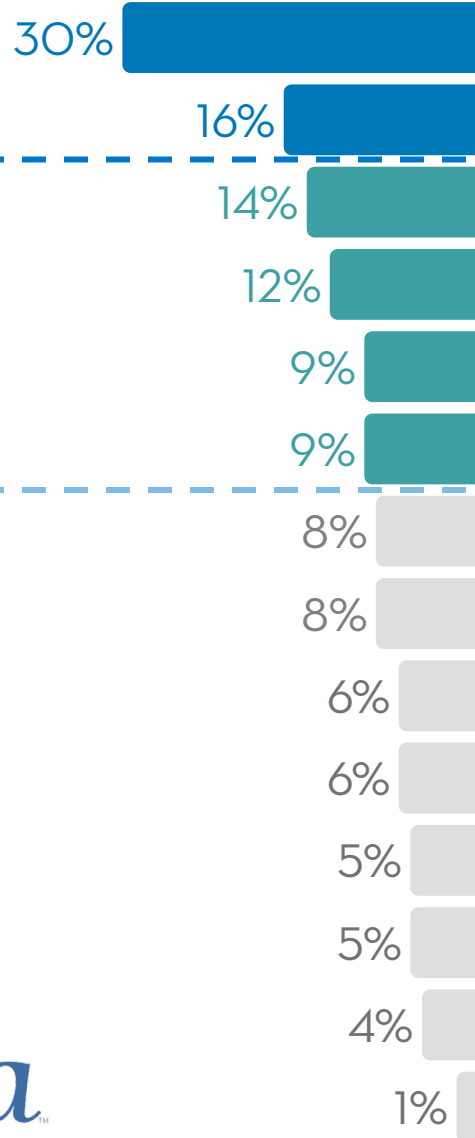
\*Multiple responses permitted.

# VISITOR ACTIVITY RATINGS

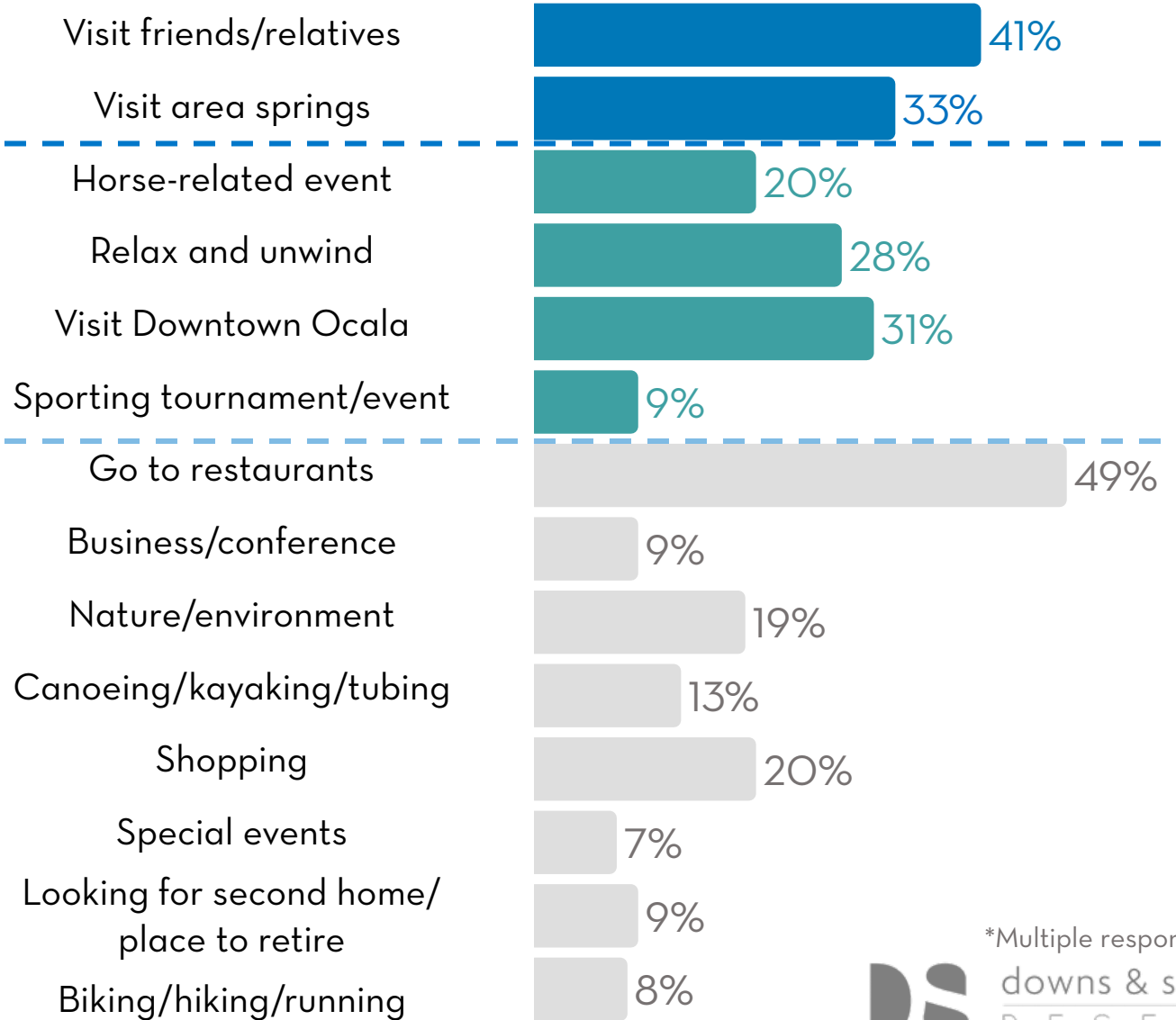


# ACTIVITIES VS. REASON FOR VISIT\*

## Reason for Visiting



## Visitor Activities





# TRAVEL PARTY SPENDING

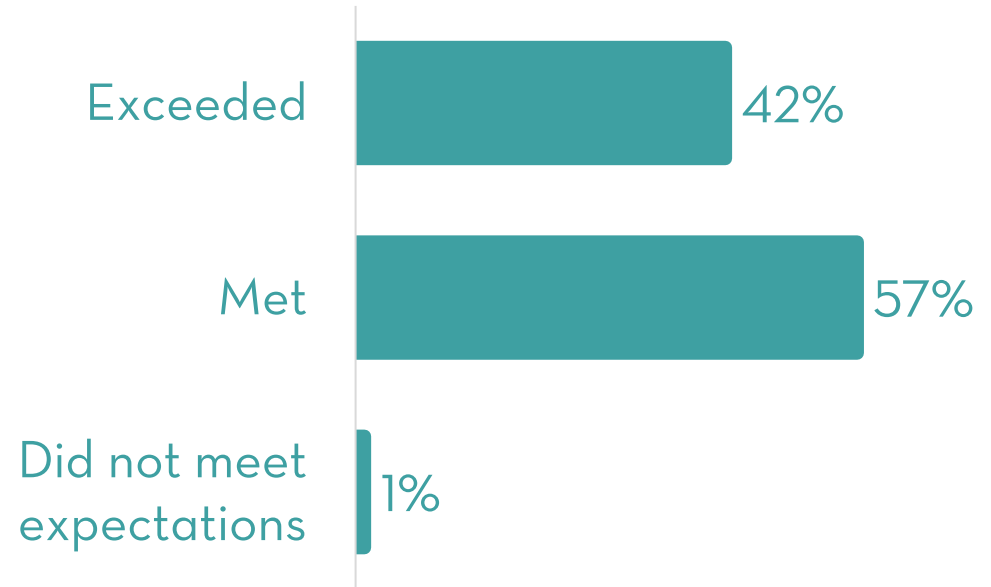
	<b>Daily Spending: All Visitors</b>	<b>Total Spending: All Visitors</b>
<i>Accommodations</i>	<i>\$68<sup>1</sup></i>	<i>\$231<sup>1</sup></i>
<i>Restaurants</i>	<i>\$77</i>	<i>\$262</i>
<i>Groceries</i>	<i>\$20</i>	<i>\$68</i>
<i>Shopping</i>	<i>\$53</i>	<i>\$180</i>
<i>Entertainment</i>	<i>\$51</i>	<i>\$173</i>
<i>Transportation</i>	<i>\$30</i>	<i>\$102</i>
<i>Other</i>	<i>\$16</i>	<i>\$54</i>
<b>Total</b>	<b>\$315</b>	<b>\$1,070</b>

# VISITOR JOURNEY: POST-TRIP



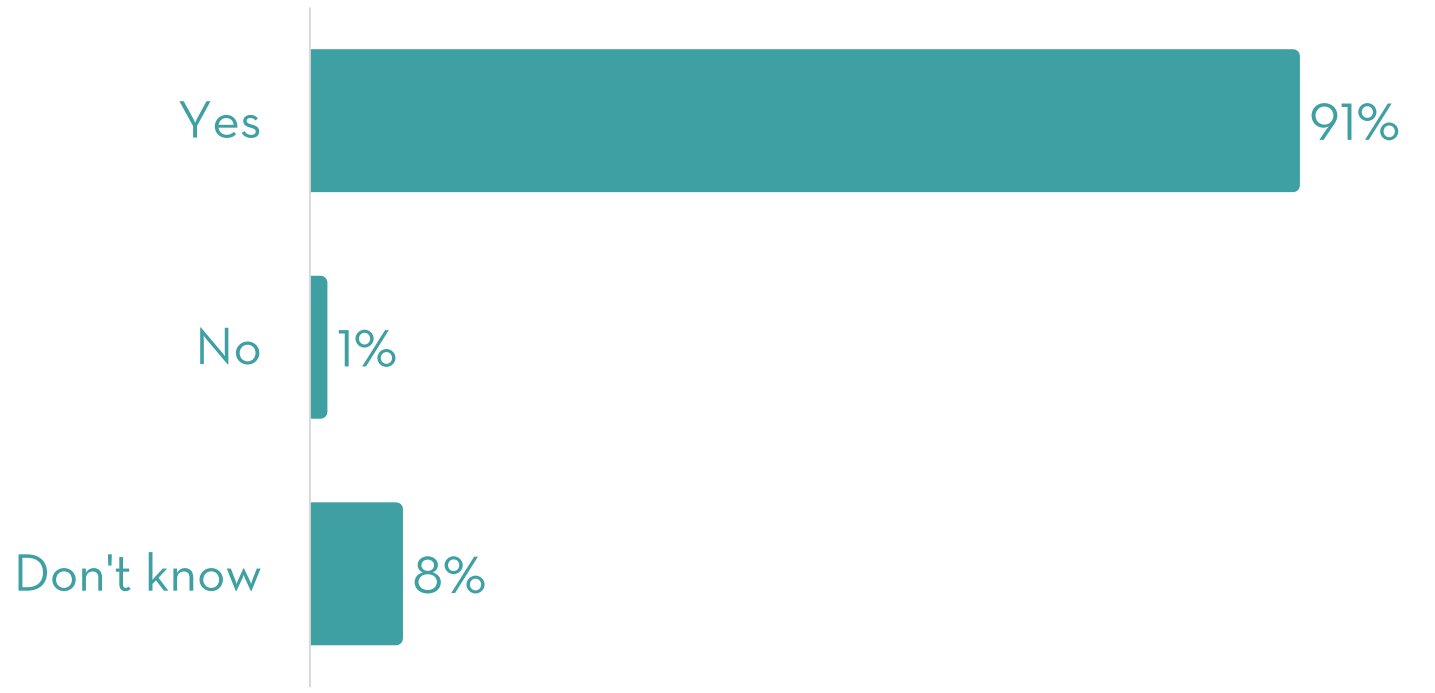
# TRIP EXPERIENCE

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



# RECOMMENDATION

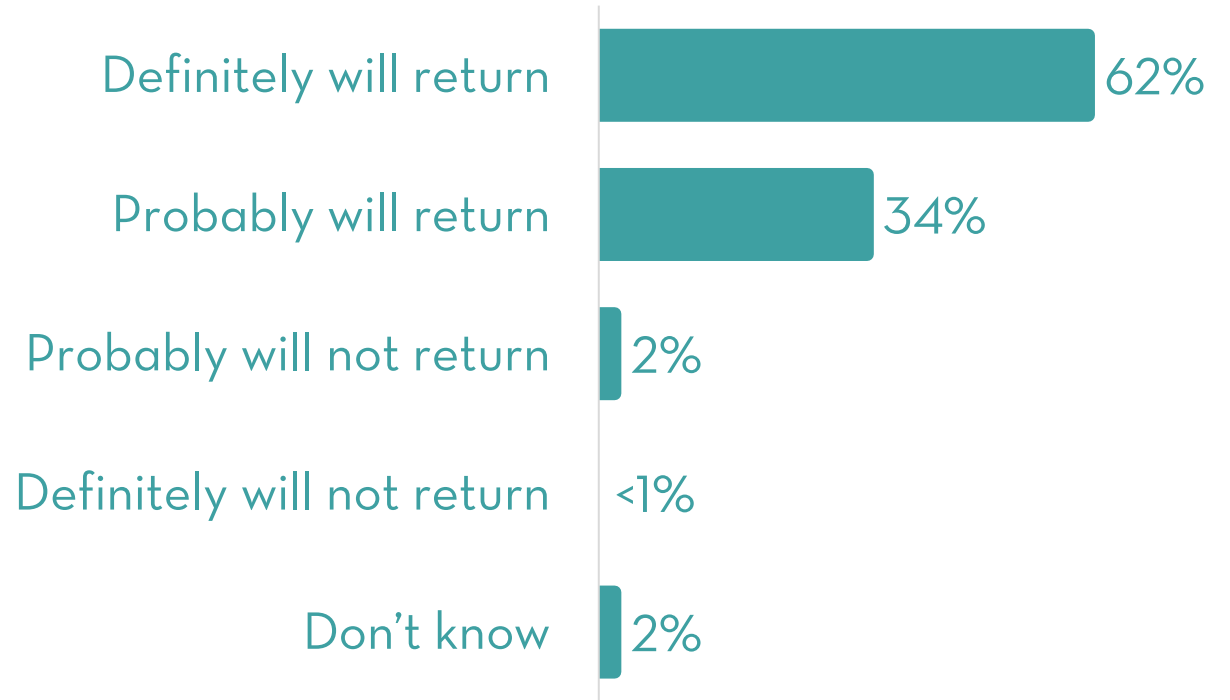
» **Over 9 in 10** visitors **would recommend** the Ocala/Marion County area to others





# LIKELIHOOD OF RETURNING

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



# 2024 to 2023 COMPARISONS



# PRE-VISIT

Visitor Metrics	Apr - June 2023	Apr - June 2024
<i>Ocala/Marion County was the only destination</i>	67%	73%
<i>Viewed Visitors Guide</i>	5%	8%
<i>Stopped at Visitors Center</i>	4%	8%
<i>Planned trip a month or less in advance</i>	50%	41%
<i>Average number of days trip was planned in advance of it being taken</i>	63	73
<i>Used OcalaMarion.com to plan their trip</i>	9%	6%
<i>Recalled Ocala/Marion County promotions</i>	23%	27%

# PRE-VISIT

Reason for Visiting	Apr - June 2023	Apr - June 2024
<i>Visit friends/family</i>	30%	30%
<i>Visit area springs</i>	16%	16%
<i>Horse-related event</i>	11%	14%
<i>Relax/unwind</i>	12%	12%
<i>Sporting tournament/event</i>	6%	9%
<i>Visit Downtown Ocala</i>	6%	9%
<i>Go to restaurants</i>	7%	8%
<i>Business meeting/conference</i>	6%	8%
<i>Nature/environment</i>	7%	6%
<i>Canoeing/kayaking/tubing</i>	6%	6%
<i>Special occasion</i>	8%	5%

Reason for Visiting	Apr - June 2023	Apr - June 2024
<i>Special event</i>	4%	5%
<i>Shopping</i>	4%	5%
<i>Other horse-related activities</i>	1%	5%
<i>Looking for a second home/place to retire</i>	3%	4%
<i>Attraction</i>	6%	3%
<i>Go to bars/night clubs</i>	1%	2%
<i>Biking/hiking/running</i>	3%	1%
<i>Art galleries/museums/culture</i>	2%	1%
<i>Golf/tennis</i>	1%	1%
<i>Fishing/hunting</i>	< 1%	1%
<i>Spas</i>	< 1%	< 1%
<i>Other</i>	11%	8%



# TRAVEL PARTY PROFILE

Top Origin States	Apr - June 2023	Apr - June 2024
Florida	45%	48%
Georgia	7%	7%
New York	4%	3%
North Carolina	3%	3%
Texas	2%	3%
Alabama	1%	2%
Illinois	3%	2%
Michigan	2%	2%
New Jersey	4%	2%
Ohio	2%	2%
Tennessee	2%	2%
Virginia	2%	2%

Top Origin Markets	Apr - June 2023	Apr - June 2024
Orlando - Daytona Beach - Melbourne	13%	12%
Tampa - St. Petersburg	10%	11%
Atlanta	5%	5%
Jacksonville	6%	5%
Miami - Ft. Lauderdale	5%	5%
Gainesville	5%	4%
New York City*	4%	4%

Top Origin Regions	Apr - June 2023	Apr - June 2024
Southeast	65%	70%
Northeast	15%	11%
Midwest	13%	12%
West	5%	5%
International	2%	2%

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

# TRIP EXPERIENCE

Visitor Metrics	Apr - June 2023	Apr - June 2024
<i>Travel party</i>	3.0	2.9
<i>Children &lt;18</i>	34%	36%
<i>Median age</i>	50	50
<i>Estimated median household income</i>	\$69,100	\$80,300
<i>1<sup>st</sup> time visitor</i>	27%	30%
<i>10+ visits to Ocala/Marion County</i>	18%	20%

Visitor Metrics	Apr - June 2023	Apr - June 2024
<i>Drove</i>	81%	81%
<i>Nights spent</i>	3.1	3.4
<i>Direct expenditures (entire trip)</i>	\$1,076	\$1,070

# TRIP EXPERIENCE

Visitor Activities	Apr - June 2023	Apr - June 2024
<i>Go to restaurants</i>	49%	49%
<i>Visit friends or family</i>	37%	41%
<i>Visit area springs</i>	37%	33%
<i>Visit Downtown Ocala</i>	25%	31%
<i>Relax and unwind</i>	22%	28%
<i>Horse-related event</i>	19%	20%
<i>Shopping</i>	13%	20%
<i>Nature/environment</i>	16%	19%
<i>Canoeing/kayaking/tubing</i>	13%	13%
<i>Go to bar/night clubs</i>	7%	10%
<i>Business meeting/conference</i>	6%	9%
<i>Attend/participate in a sport tournament/event</i>	6%	9%

Visitor Activities	Apr - June 2023	Apr - June 2024
<i>Looking for a second home/place to retire</i>	4%	9%
<i>Other horse-related activities</i>	3%	9%
<i>Special occasion</i>	11%	8%
<i>Attraction</i>	14%	8%
<i>Golf/tennis</i>	5%	8%
<i>Biking/hiking/running</i>	10%	8%
<i>Special event</i>	8%	7%
<i>Fishing/hunting</i>	4%	7%
<i>Art galleries/museums/cultural events</i>	5%	4%
<i>Spas</i>	2%	2%
<i>Other</i>	11%	8%

# POST TRIP EVALUATION

Satisfaction Metrics	Apr - June 2023	Apr - June 2024
<i>Visit Met + Exceeded expectations</i>	98%	99%
<i>Will return to Ocala/Marion County</i>	94%	96%
<i>Will recommend Ocala/Marion County</i>	87%	91%



# Ocala/MARION COUNTY VCB

Economic Impact Study &  
Visitor Tracking Report  
Apr – June 2024

Downs & St. Germain Research  
850-906-3111 | [www.dsg-research.com](http://www.dsg-research.com)  
[contact@dsg-research.com](mailto:contact@dsg-research.com)

