

Ocala/MARION COUNTY VCB

Economic Impact Study &
Visitor Tracking Report
Apr-June 2025



STUDY OBJECTIVES: VISITOR JOURNEY



Visitor Tracking Study

- » Interviews were completed in person and online with 571 visitors at local hotels, attractions, and events between April 1, 2025 and June 30, 2025



Partner & Event Involvement

- » Appleton Museum of Art
- » KP Hole Park
- » Silver Springs State Park
- » HDG Hotels
- » Hampton Inn and Suites
- » Circle Square Cultural Center
- » Ft. King
- » Florida Horse Park
- » Rock The Country Ocala
- » Santos Bike Shop
- » WEC
- » FAST Aquatic Center

EXECUTIVE SUMMARY



VISITOR JOURNEY: ECONOMIC IMPACT



APR- JUN 2025 TOURISM SNAPSHOT



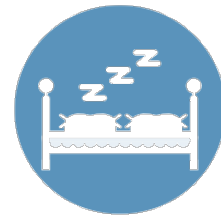
\$1,721,555

**TDT
COLLECTIONS**



272,700

**ROOM
NIGHTS**



54.5%

**OCCUPANCY
RATE**



\$122.71

**AVERAGE DAILY
RATE**



\$66.82

**REVENUE PER AVAILABLE
ROOM**

2025 vs. 2024

↑ 7.7%

↓ 3.8%

↓ 7.2%

↑ 2.3%

↓ 5.1%

- » Tourist Development Tax (TDT) collections reported for April through June reflect tourism spending that actually occurred in March through May, as TDT is collected one month after the expenditures take place.
- » While occupancy softened, continued growth in room rates helped offset the impact—resulting in a smaller decline in spending compared to the drop in visitation.
- » Advertising recall (33%) and influence from said advertisements (22%) in April - June 2025 both increased compared to April - June 2024's ad recall (27%) and influence of advertisements (15%)
- » Length of stay increased from 3.4 nights in 2024 to 3.7 nights in 2025.
- » April - June 2025 saw significant gains in those requesting or downloading the visitor guide with 16% of visitors using the guide compared to 8% of visitors in April - June 2024

VISITOR & LODGING METRICS

Visitor Statistics ¹	Apr-Jun 2024	Apr-Jun 2025	Percent Change
Visitors	396,100	345,700	- 12.7%
Direct Expenditures ²	\$161,313,600	\$160,977,100	- 0.2%
Total Economic Impact ³	\$243,077,200	\$242,570,200	- 0.2%

Lodging Statistics ⁴	Apr-Jun 2024	Apr-Jun 2025	Percent Change
Occupancy	58.7%	54.5%	-7.2%
Room Rates	\$119.90	\$122.71	+ 2.3%
RevPAR	\$70.38	\$66.82	- 5.1%
Room Nights	283,600	272,700	- 3.8%
TDT Collections	\$1,598,991	\$1,721,555	+ 7.7%
Hotel Units	5,056	5,223	+ 3.3%
Vacation Rental Units	254	280	+10.2%

¹ While occupancy softened, continued growth in room rates helped offset the impact—resulting in a smaller decline in spending compared to the drop in visitation.

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

³ Multiplier stayed the same at 1.51 from April-June 2024 to 1.51 in April-June 2025.

⁴ 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 APR-JUN 2025

- » **Over 2 in 5** visitors planned their trips to the Ocala/Marion County area **a month or less in advance** (No change YoY)
- » Visitors planned their trip **on average 73 days in advance of their visit** (73 days in 2024)



TOP TRIP PLANNING SOURCES APR-JUN 2025*



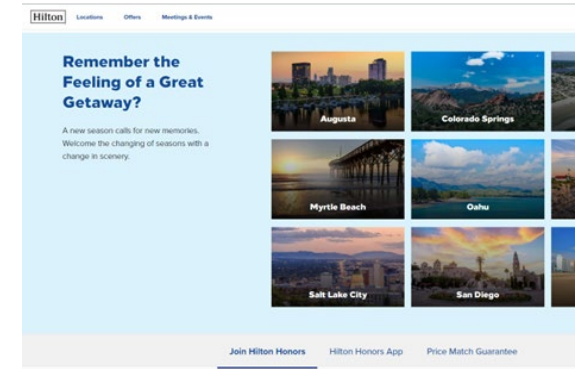
52% Talk to friends and family
(+7% points YoY)



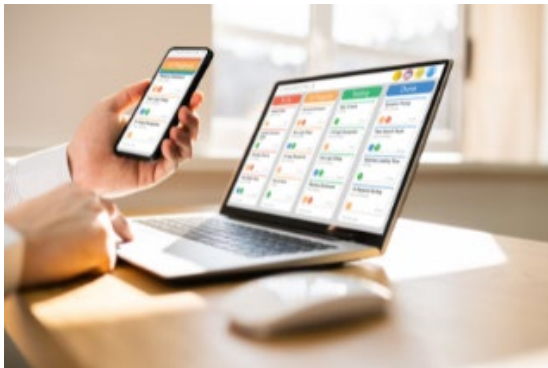
50% Search sites
(+10% points YoY)



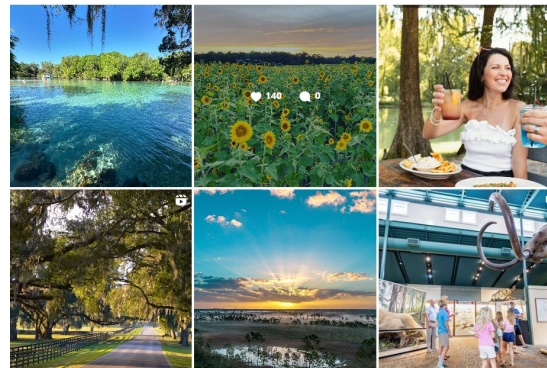
10% Personal social media
(-3% points YoY)



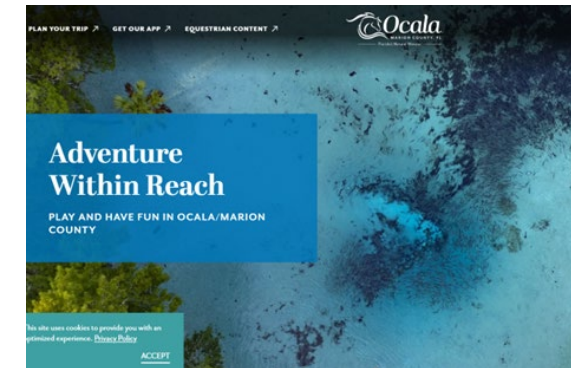
9% Hotel/resort website/app
(-2% points YoY)



9% Trip planning website/app
(-2% points YoY)



7% Destination social media
(-5% points YoY)



5% Online advertisement
(+1% points YoY)

TOP REASONS FOR VISITING APR-JUN 2025*



35% Visit friends/relatives
(+5% points YoY)



15% Attend horse shows, sales,
events (+1% point YoY)



14% Visit area springs
(-2% points YoY)



13% Relax/unwind
(+1% points YoY)



10% Dining out
(+2% point YoY)



10% Visit Downtown Ocala
(+1% points YoY)

PRE-TRIP RECALL OF ADVERTISING APR-JUN 2025*

- » **33%** of visitors recalled advertising about the Ocala/Marion County area **(+6% points YoY)**
- » **2 in 3** visitors who recalled advertising were influenced by this information to visit the area which represents **22% of all visitors (+8% point YoY)**



SOURCES OF ADVERTISING RECALL APR-JUN 2025*

Base: **33%** of visitors who recalled advertising



24% Social media
(-6% points YoY)



23% Online
Advertisement
(-1% points YoY)



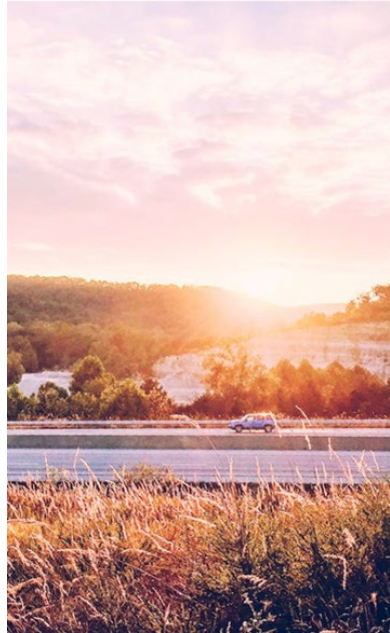
20% Television
(+6% points YoY)



18% Magazine/
newspaper article
(+9% points YoY)



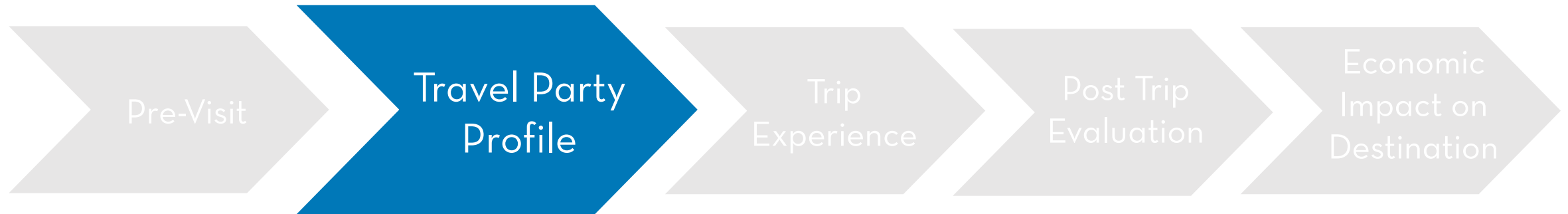
15% Print
Advertisement
(+3% points YoY)



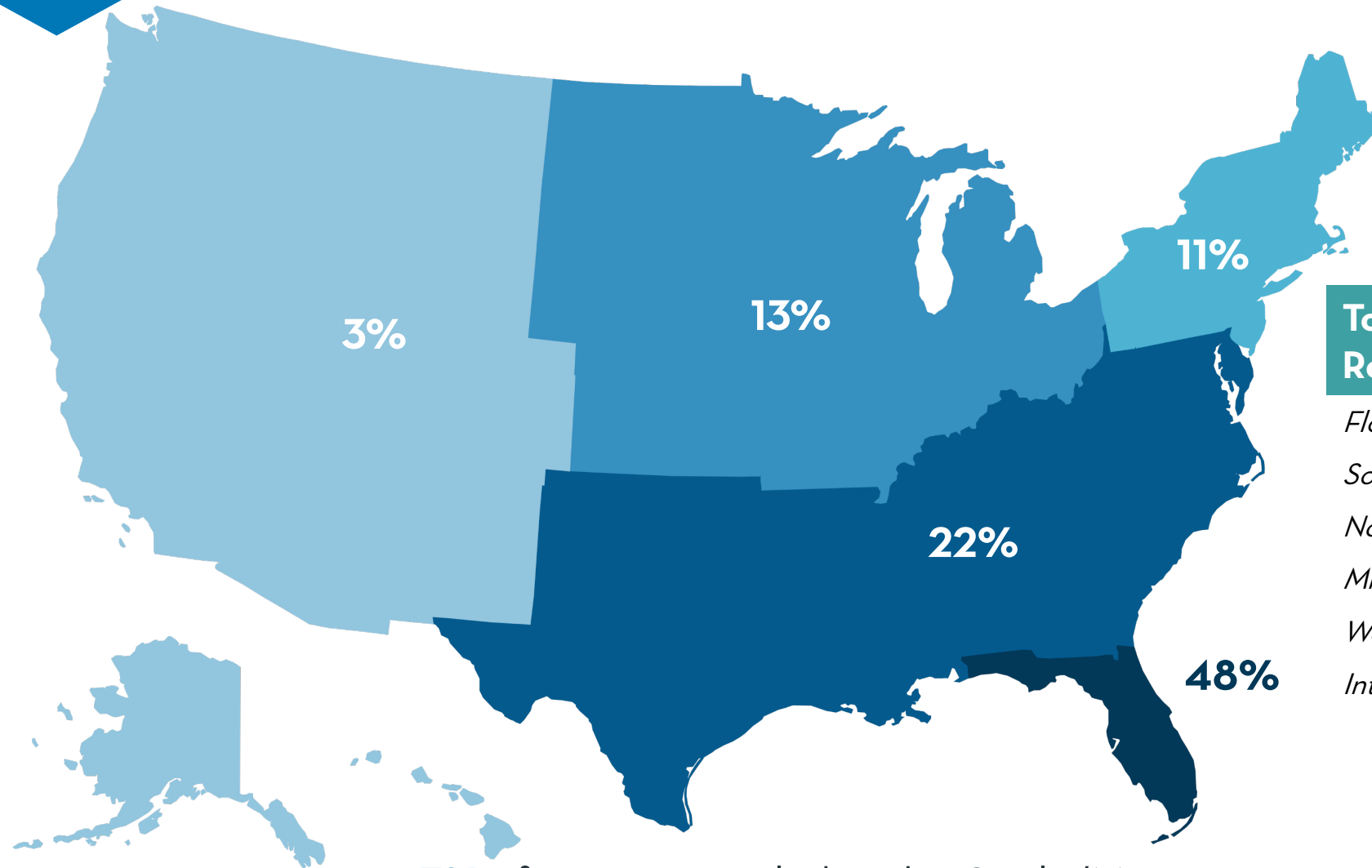
15% Billboard
(-2% points YoY)

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

VISITOR JOURNEY: TRAVEL PARTY PROFILE



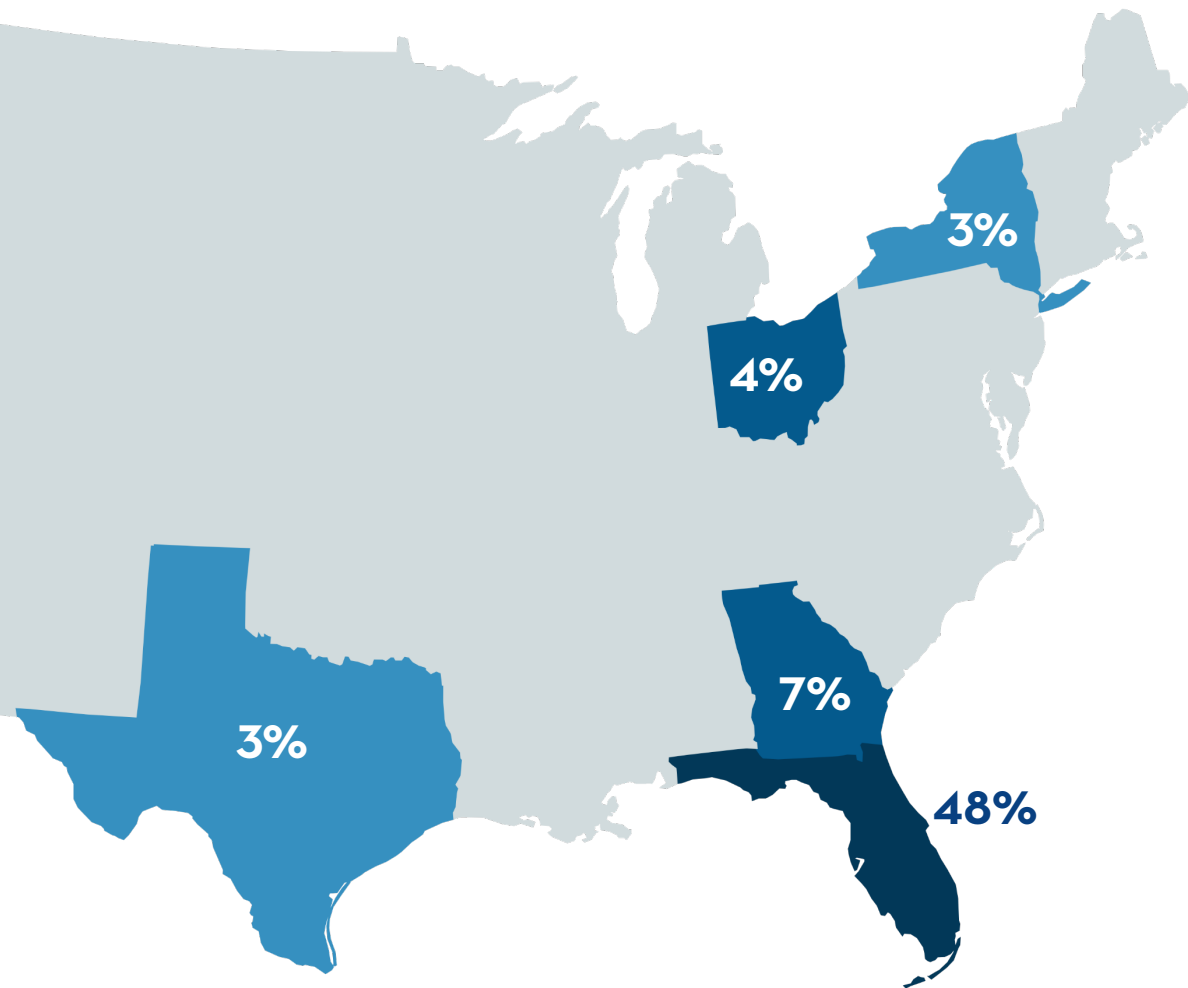
REGIONS OF ORIGIN APR-JUN 2025



Top Origin Regions	% Difference YoY
Florida	No change
Southeast	No change
Northeast	No change
Midwest	+1% points
West	-2% point
International	+1% point

3% of visitors traveled to the Ocala/Marion County area from outside of the U.S.

TOP STATES OF ORIGIN APR-JUN 2025



Over 3 in 5 visitors traveled to Ocala/Marion County from 5 states:

- **48%** Florida (No change YoY)
- **7%** Georgia (No change YoY)
- **4%** Ohio (+2% points YoY)
- **3%** New York (No change YoY)
- **3%** Texas (No change YoY)

TOP ORIGIN MARKETS APR-JUN 2025



15% Orlando – Daytona Beach
– Melbourne **(+3% point YoY)**



8% Tampa – St. Petersburg
(-3% YoY)



7% Jacksonville
(+2% point YoY)



6% Gainesville
(+2% point YoY)



5% Atlanta
(No change YoY)

TRAVEL PARTIES APR-JUN 2025

- » The typical visitor traveled in a party size of **2.9** people (**2.8 in 2024**)



- » **36%** traveled with at least one person under the age of 18 (**No change YoY**)



VISITOR PROFILE APR-JUN 2025

- » The typical Ocala/Marion County area visitor:
 - » Is **50** years old (**51 in 2024**)
 - » Has a household income of **\$91,700** per year (**\$79,300 in 2024**)



NEW & RETURNING VISITORS APR-JUN 2025

- » **Over 1 in 3** were first-time visitors to the Ocala/Marion County area **(+6% points YoY)**
- » **Nearly 1 in 5** visitors were loyalists, having visited over 10 times **(-1% points YoY)**



VISITOR JOURNEY: TRIP EXPERIENCE



- » **86%** of visitors **drove** to the Ocala/Marion County area **(+5% points YoY)**
- » **12%** of visitors flew via the **Orlando International Airport** **(-1% point YoY)**



VISITOR BEHAVIOR APR-JUN 2025

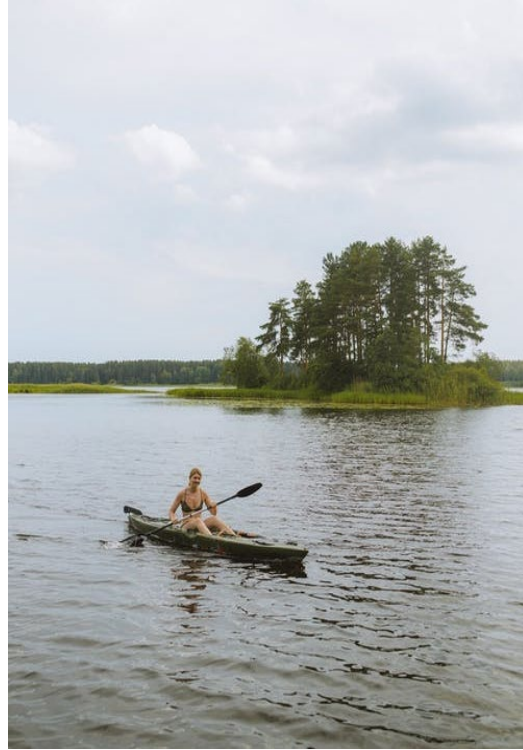
- » Typical visitors spent **3.7** nights in Ocala/Marion County area* (**3.4 in 2024**)
- » **Nearly 4 in 5** visitors were only visiting Ocala/Marion County during their trip (**+5% points YoY**)



TOP ACCOMMODATIONS APR-JUN 2025



48% Hotel/motel/resort
(+3% points YoY)



26% Day tripper
(-2% point YoY)



12% Friends' or
relatives' home
(+1% points YoY)



6% Vacation rental home*
(No change YoY)

TOP ACTIVITIES DURING VISIT APR-JUN 2025*



67% Dining out
(+18% points YoY)



49% Visit family/friends
(+8% points YoY)



33% Visit Downtown
Ocala (+2% points YoY)



31% Visit area springs
(-2% points YoY)



29% Relax & unwind
(+1% points YoY)



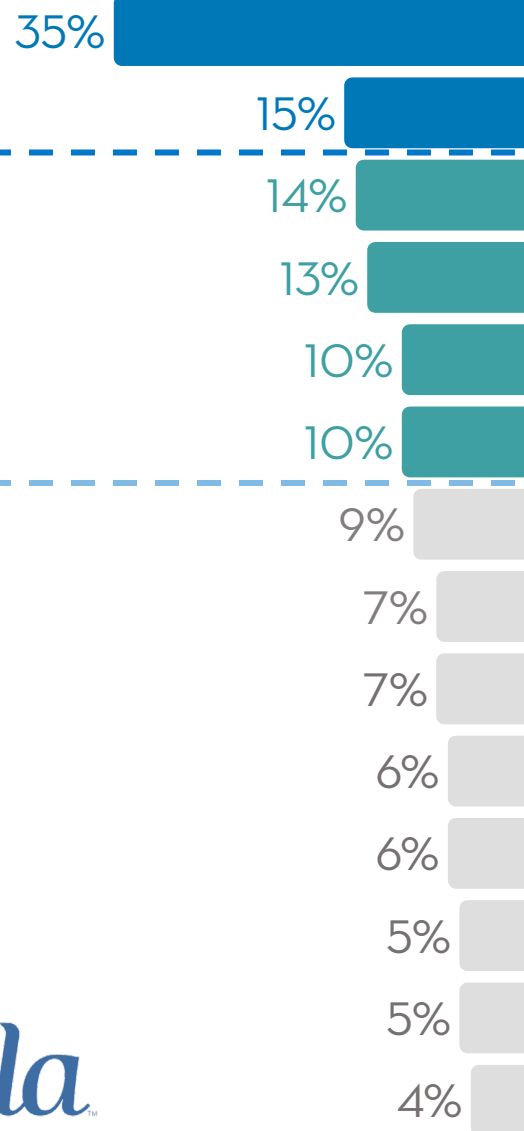
27% Shopping
(+7% points YoY)



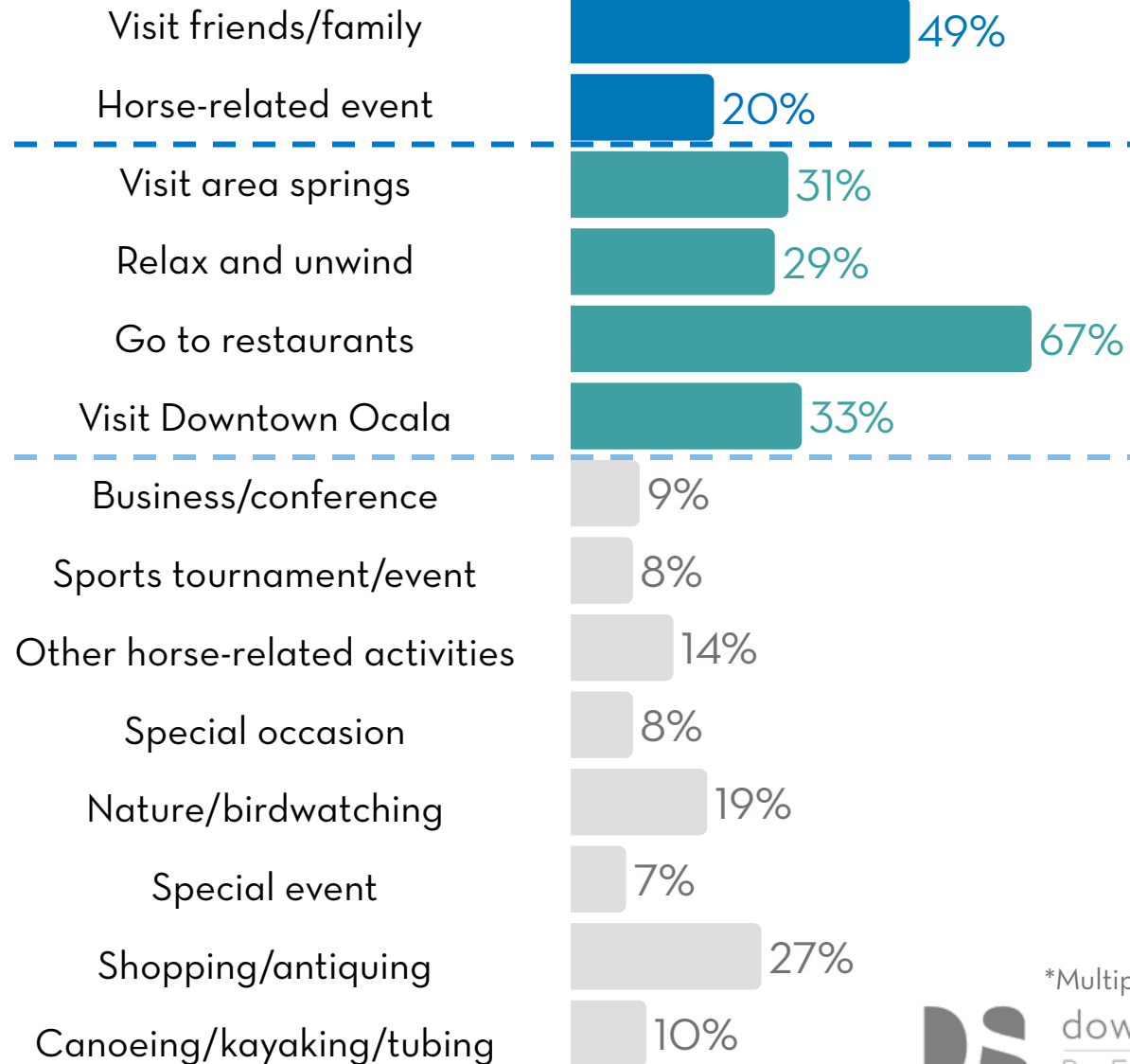
20% Attend horse shows,
sales, events
(No change YoY)

ACTIVITIES VS. REASON FOR VISIT APR-JUN 2025*

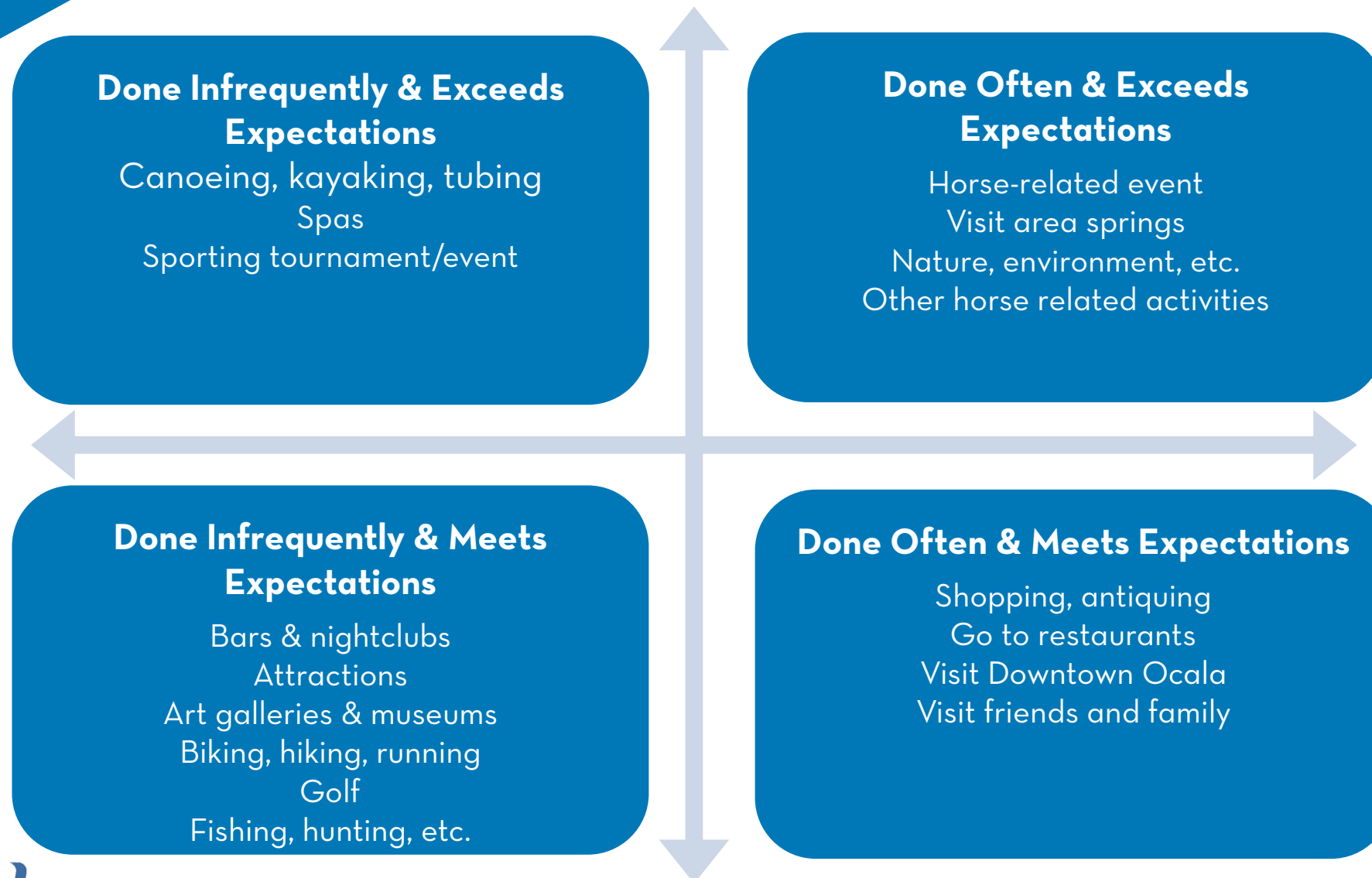
Reason for Visiting



Visitor Activities



QUADRANT ANALYSIS APR-JUN 2025



TRAVEL PARTY SPENDING APR-JUN 2025

- » Travel parties spent **\$314 (\$315 in 2024)** per day and **\$1,160 (\$1,071 in 2024)** during their trip



VISITOR JOURNEY: POST-TRIP



VISITOR SATISFACTION APR-JUN 2025

- » **99%** of visitors said their visit met or exceeded expectations with **45%** exceeded expectations (**+3% points YoY**)
- » **92%** will recommend Ocala/Marion County to a friend (**+1% points YoY**)
- » **95%** will return to Ocala/Marion County with **49%** saying they will definitely return (**-13% points YoY**)



AREA DESCRIPTIONS APR-JUN 2025



"We used to live here, and Ocala has grown a lot since then, but it is still very pretty and hasn't gotten too crowded. I would also say that the restaurants have gotten much better too."



"There is an old feel to the place that is unique! The parks and nature trails are something to see. Even if it just for a small vacation I would say spend a few days here."



"There are lots of rolling green pastures with white fences, beautiful horses and fancy huge barns. Also, there are many natural springs in Ocala that are beyond magical"



DETAILED FINDINGS

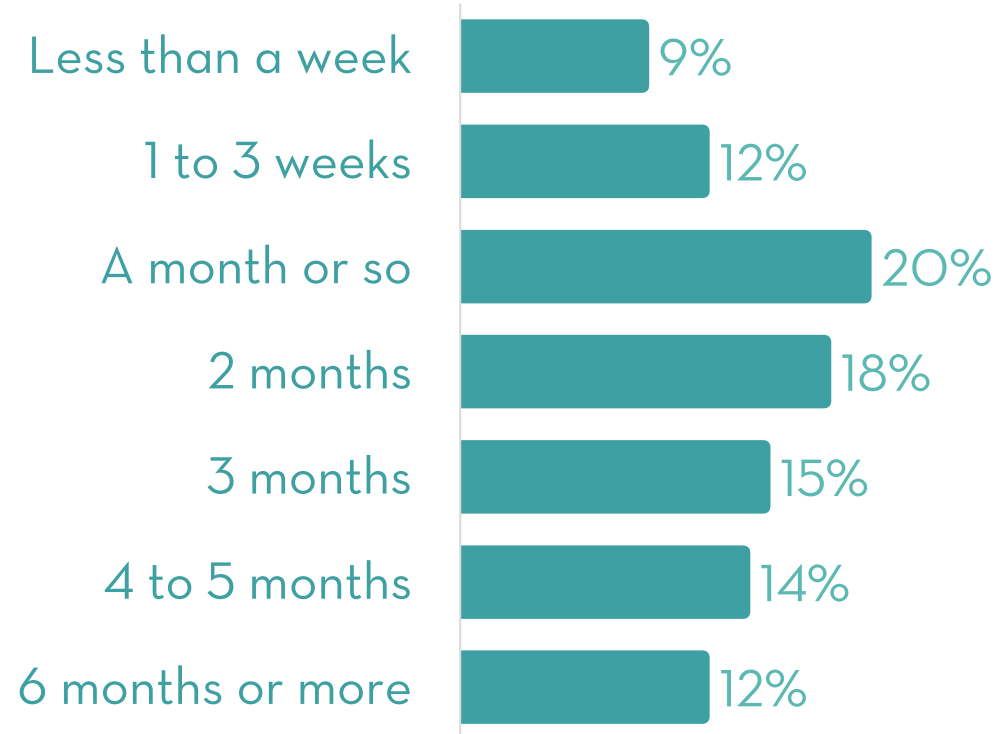


VISITOR JOURNEY: PRE-VISIT



TRIP PLANNING CYCLE

- » **Over 2 in 5** of 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**



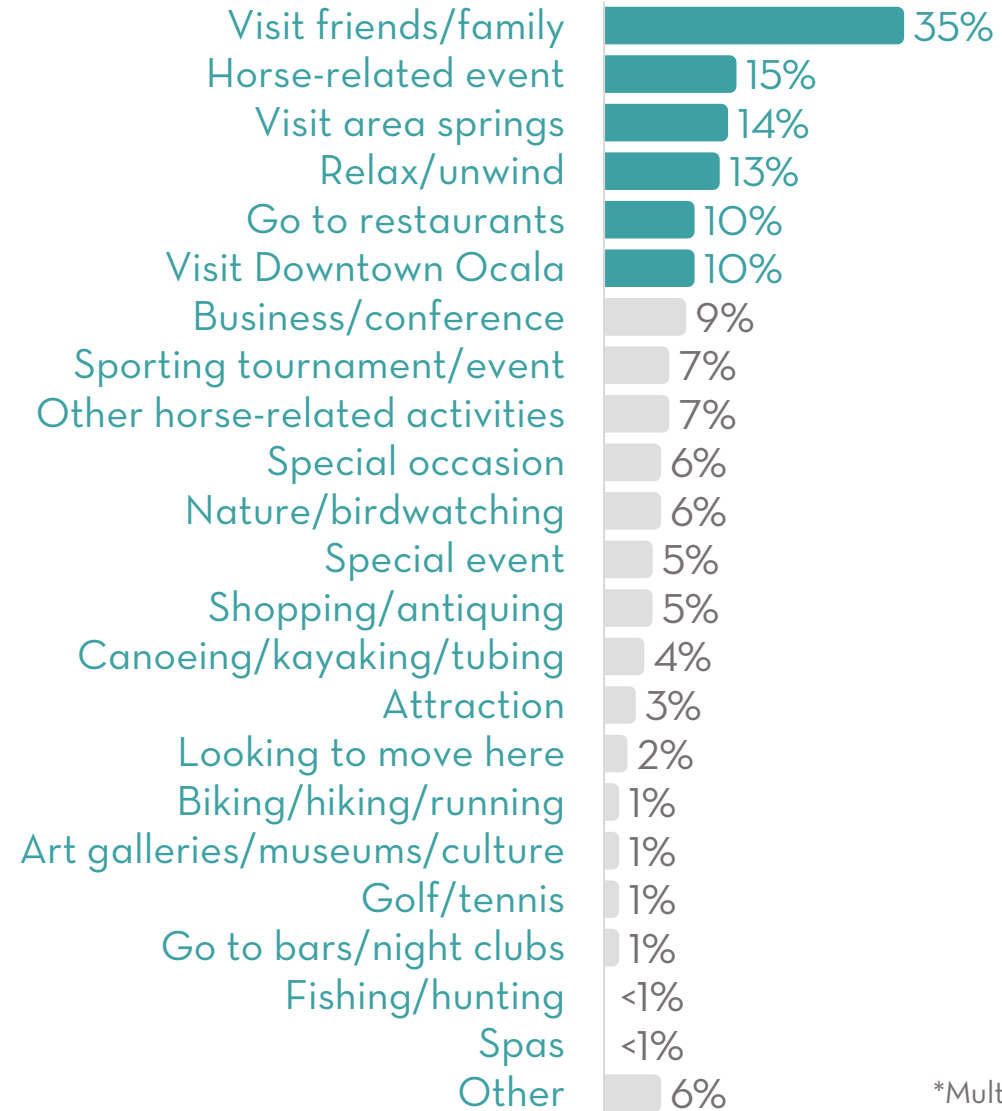
TRIP PLANNING SOURCES*

- » **Talking to friends** is the **top planning source** for trips to Ocala/Marion County
- » **Over half** of visitors used a **search engine (i.e., Google)** to plan their trip



REASONS FOR VISITING*

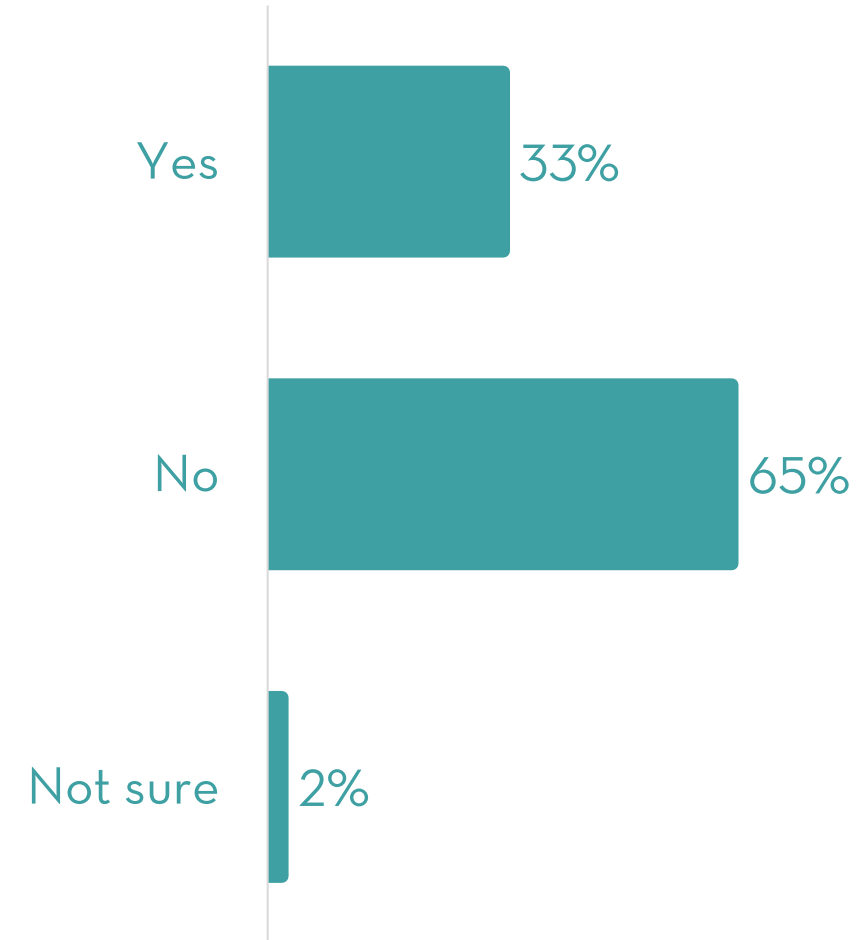
- » **Visiting friends and relatives and horse-related events** are the **top two** choices for coming, as **half** of visitors came to Ocala/Marion County for this reason
- » **Nearly 1 in 6** visitors came to Ocala/Marion County for **area springs**



RECALL OF ADVERTISING*

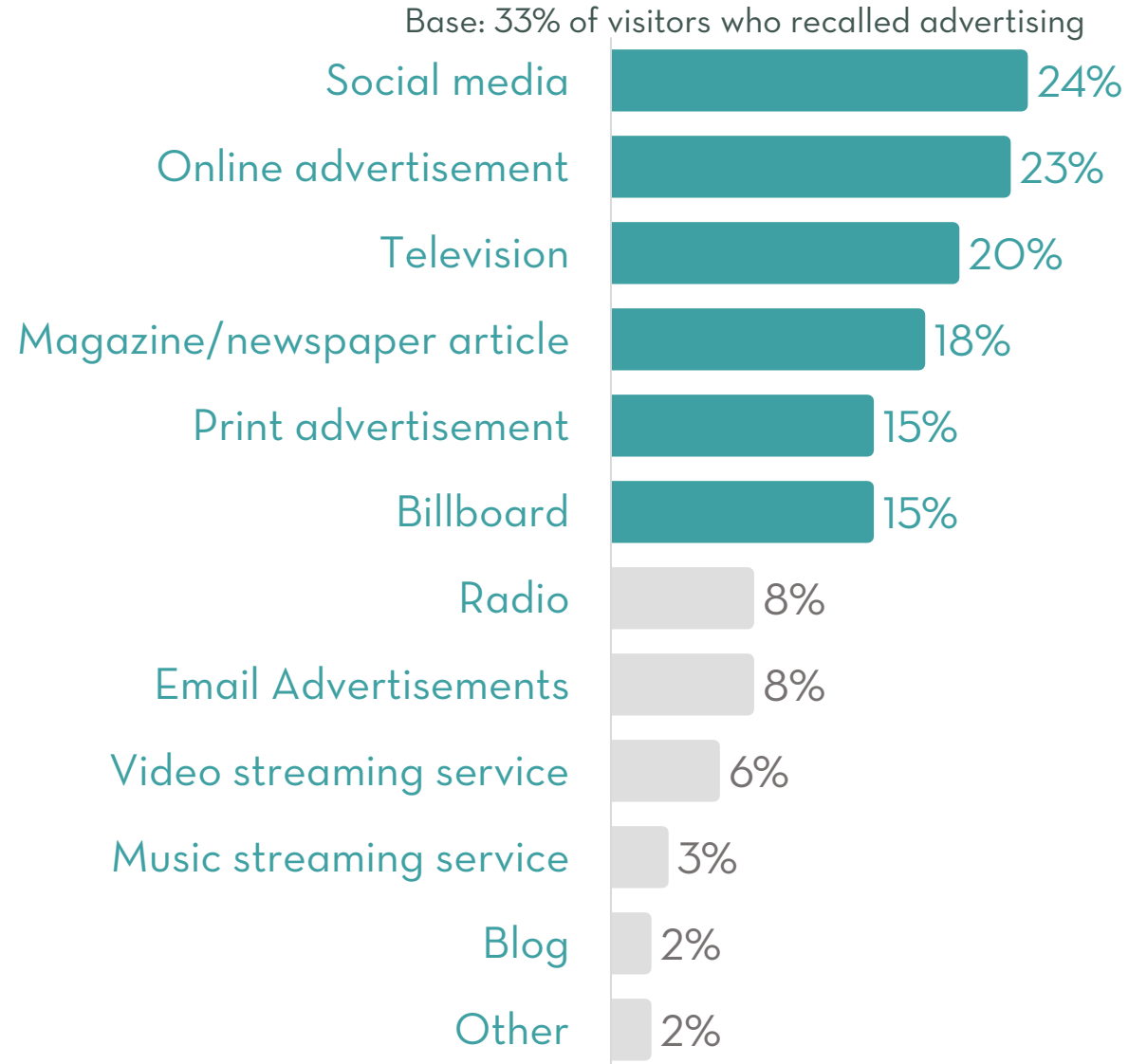
- » **1 in 3** visitors recalled advertising about the Ocala/Marion County area
- » Of the visitors who recalled advertising, **2 in 3 (representing 22% of all visitors)** were influenced by this information to come to the area

Recalled Advertising



ADVERTISING SOURCE*

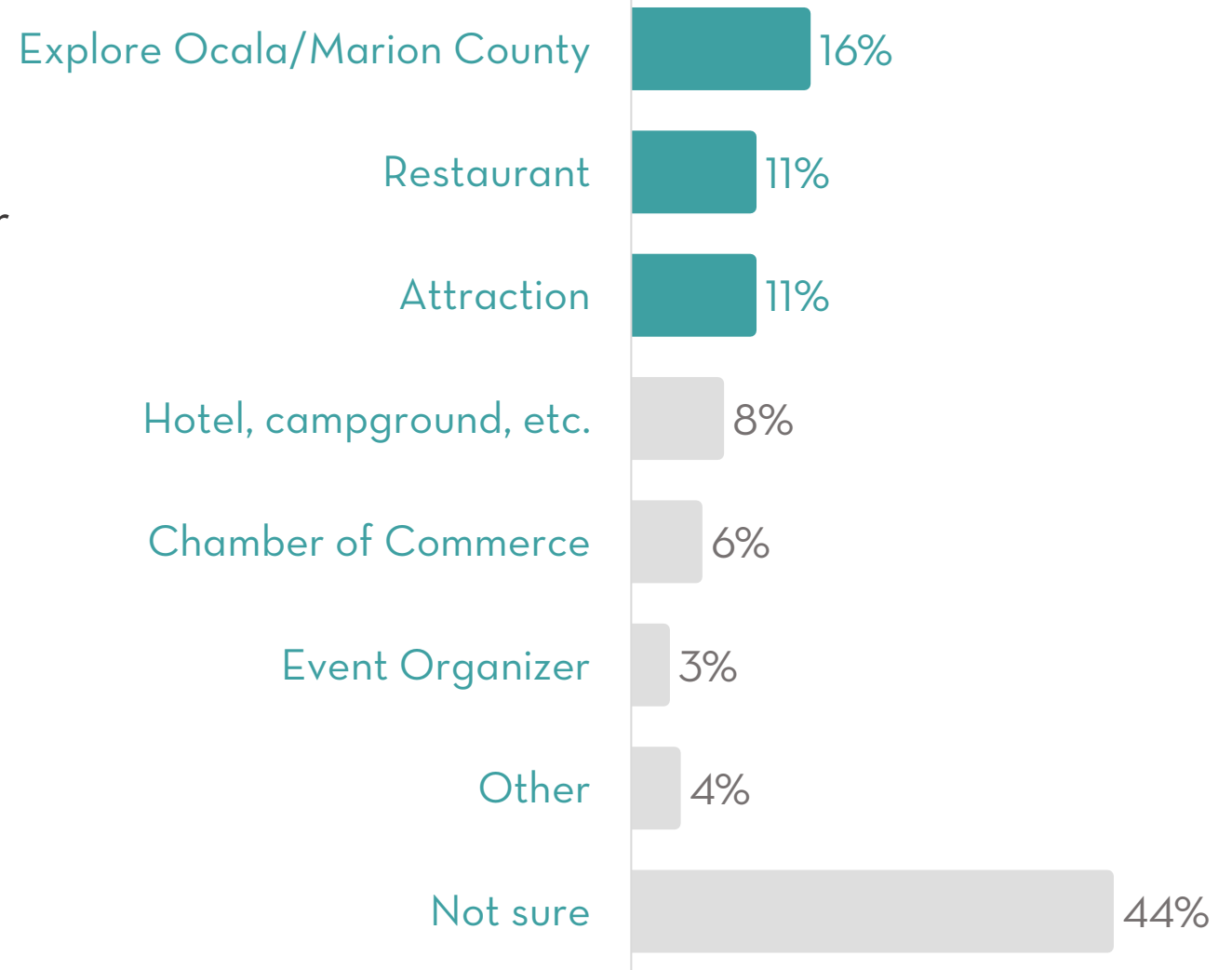
- » **Nearly 1 in 4** visitors who recalled advertising for the Ocala/Marion County area recalled advertisements on **social media and online advertisement**
- » **1 in 5** visitors recalled advertising from **television and magazine/newspaper articles**



SPONSORED ADVERTISEMENT*

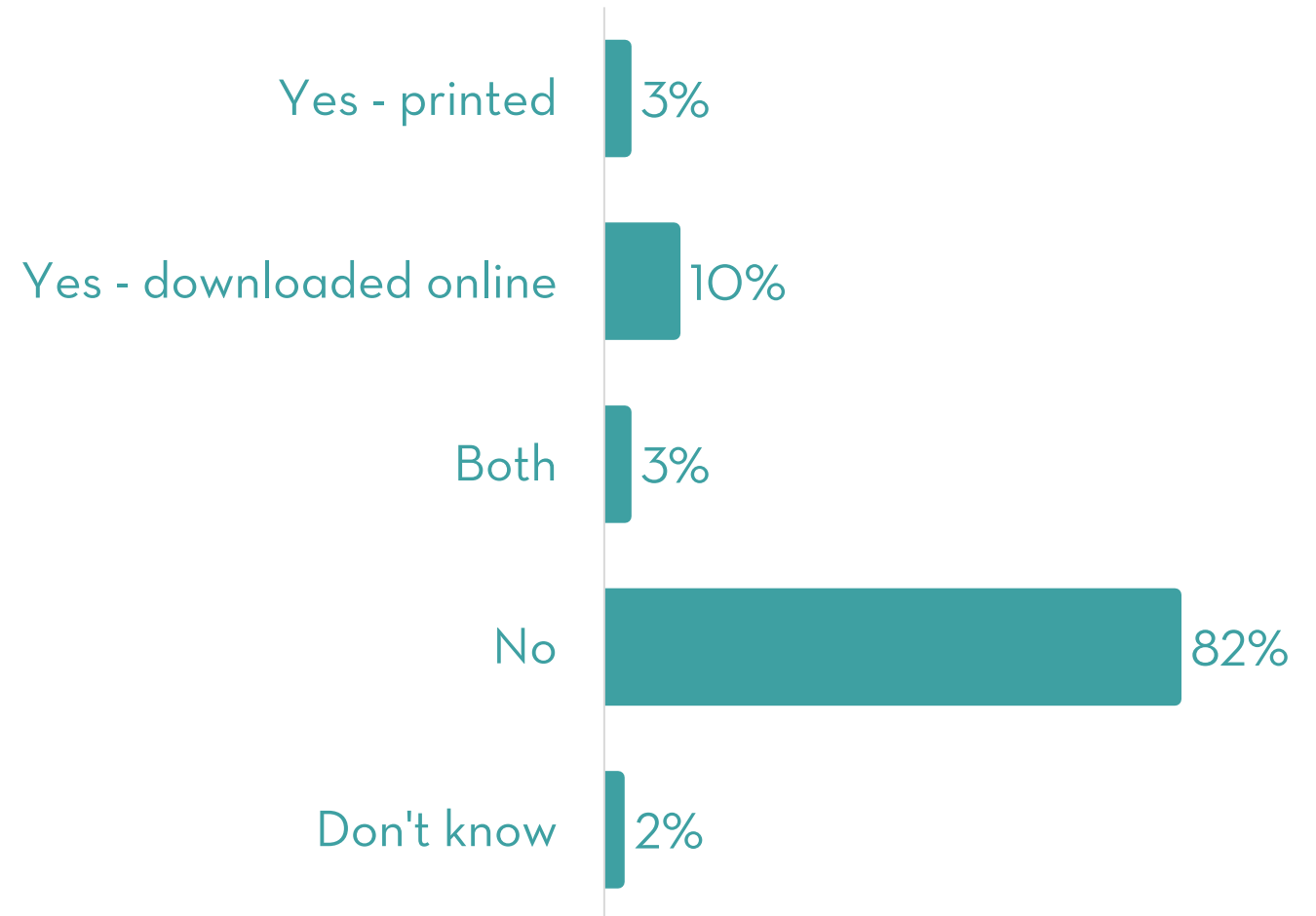
- » **1 in 6** visitors who recalled advertising for the Ocala/Marion County area recall **Explore Ocala/Marion County** as a sponsor of the advertisement
- » **Over 1 in 10** visitors stated that they recalled advertisements sponsored by a **restaurant and an attraction**

Base: 33% of visitors who recalled advertising

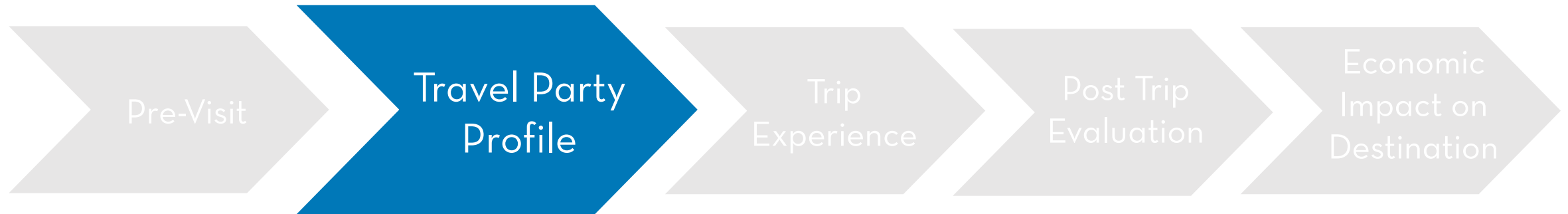


VISITOR GUIDE

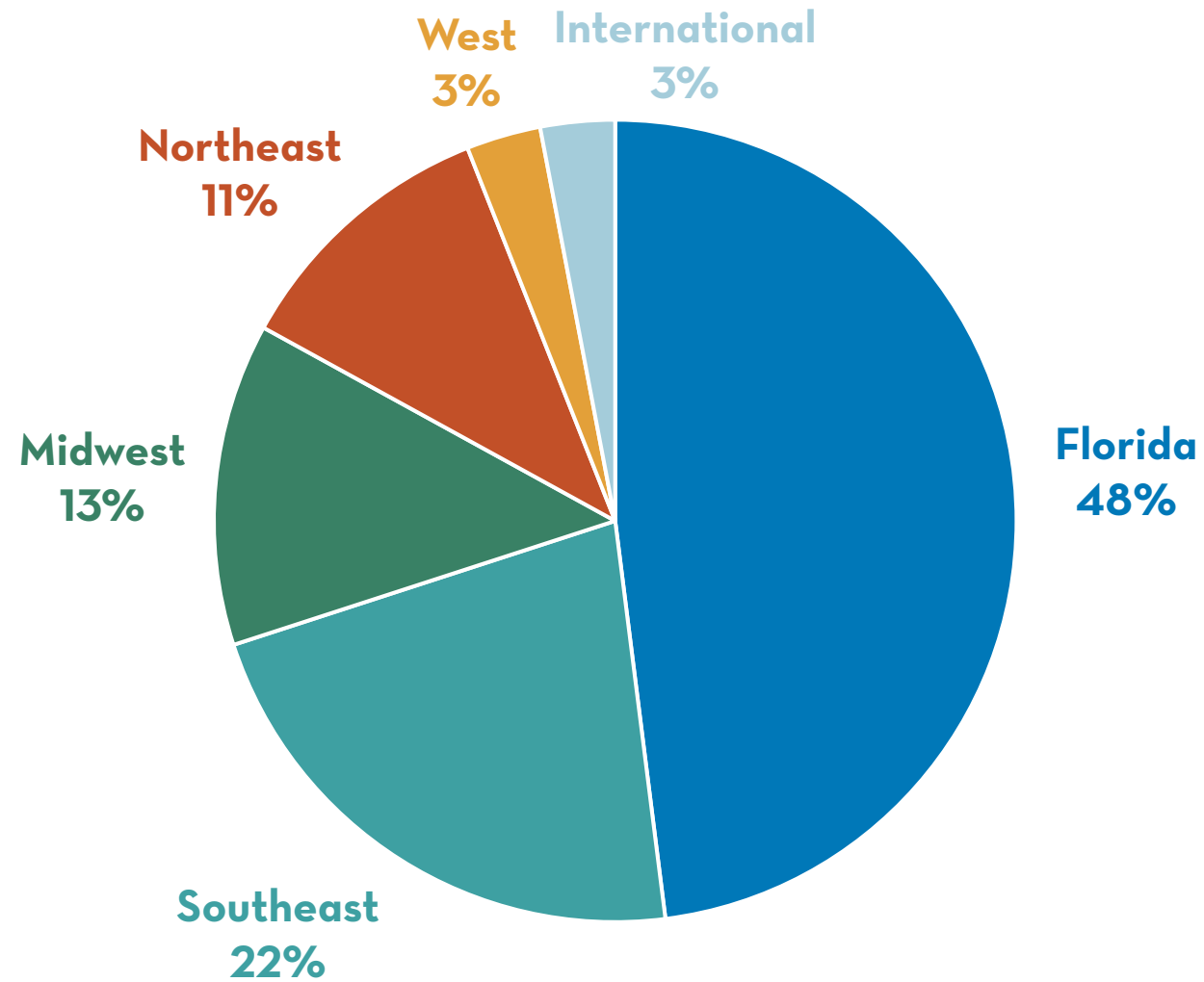
- » **16%** of visitors viewed the **print and/or online visitor guide**
- » Usefulness Rating: **8.4 out of 10***



VISITOR JOURNEY: TRAVEL PARTY PROFILE



REGION OF ORIGIN



TOP ORIGIN STATES

- » **Over 4 in 5** visitors came to Ocala/Marion County from 15 states
- » **Florida** was the key origin state for the Ocala/Marion County area

State	Percent
Florida	48%
Georgia	7%
Ohio	4%
New York	3%
Texas	3%
Alabama	2%
Illinois	2%
Kentucky	2%
Maryland	2%
Michigan	2%
New Jersey	2%
North Carolina	2%
South Carolina	2%
Tennessee	2%
Virginia	2%

TOP ORIGIN MARKETS

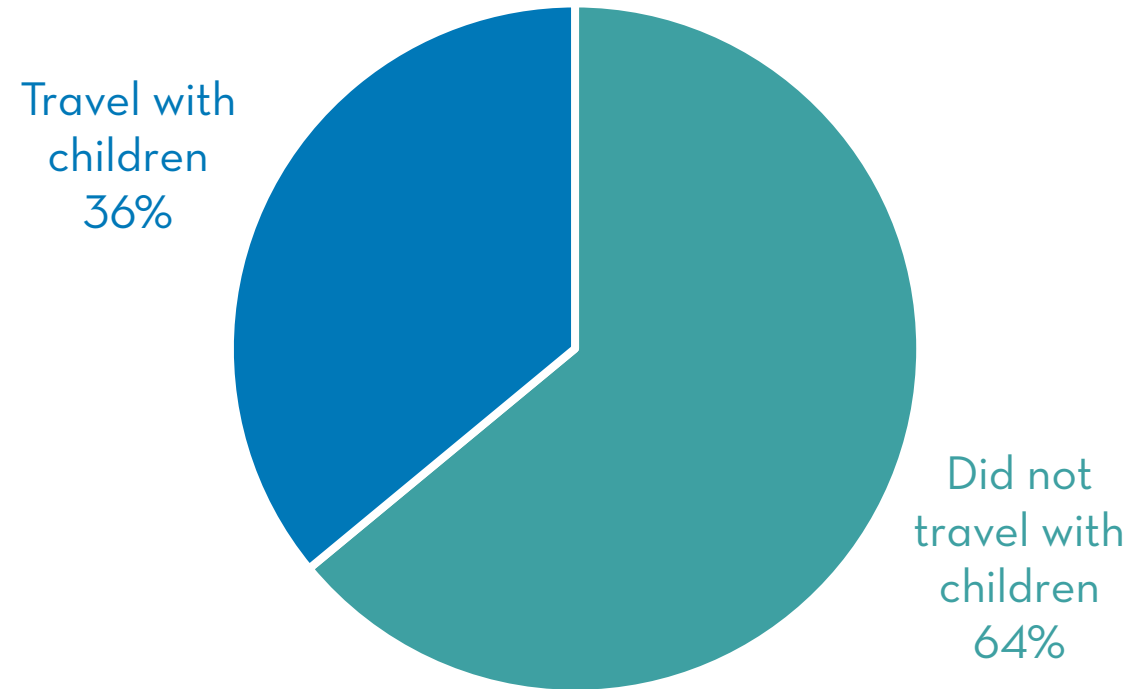
- » **Orlando-Daytona Beach-Melbourne, Tampa-St. Petersburg and Jacksonville** were key origin markets this quarter
- » **Florida markets** dominated the top markets for Ocala/Marion County

Market	Percent
Orlando-Daytona Beach-Melbourne	15%
Tampa-St. Petersburg	8%
Jacksonville	7%
Gainesville	6%
Atlanta	5%
Miami-Fort Lauderdale	3%
New York*	3%
Tallahassee-Thomasville	3%
West Palm Beach-Ft Piece	3%
Cleveland-Akron	2%
Dallas-Fort Worth	2%
Nashville	2%
Philadelphia	2%

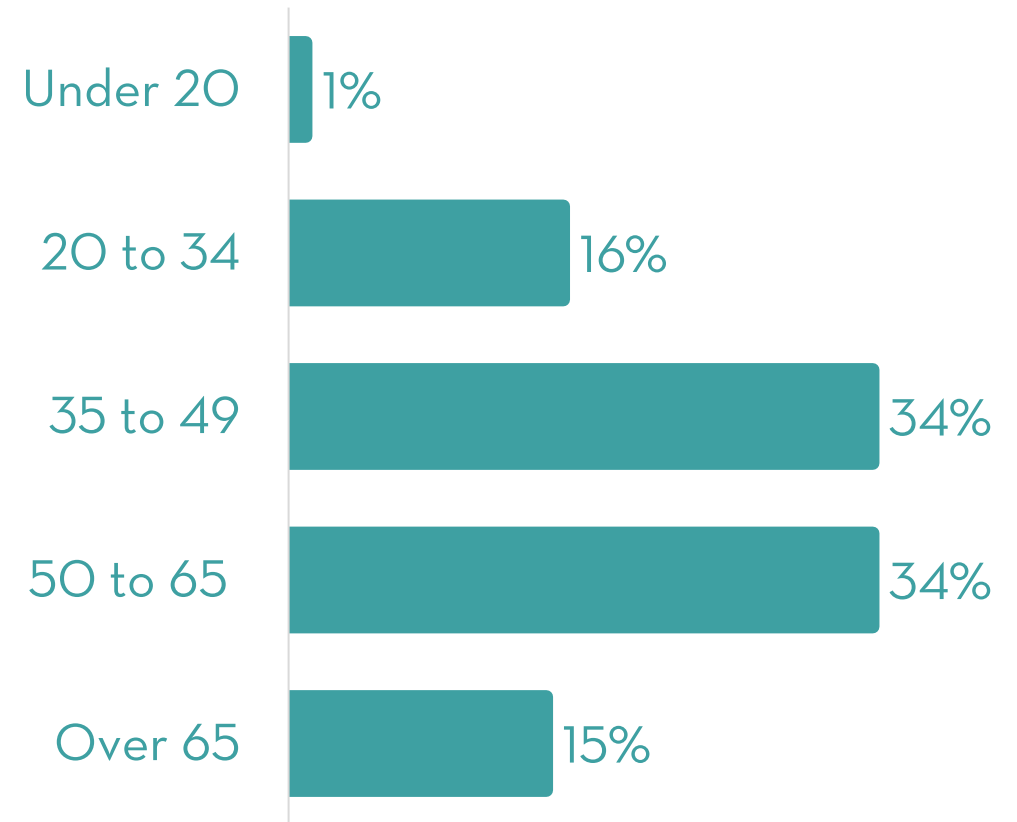
*New York City includes areas of New York, New Jersey and Connecticut

TRAVEL PARTIES

- » The typical travel party size was **2.8** people
- » **Over 1 in 3** travel parties included children under the age of 18

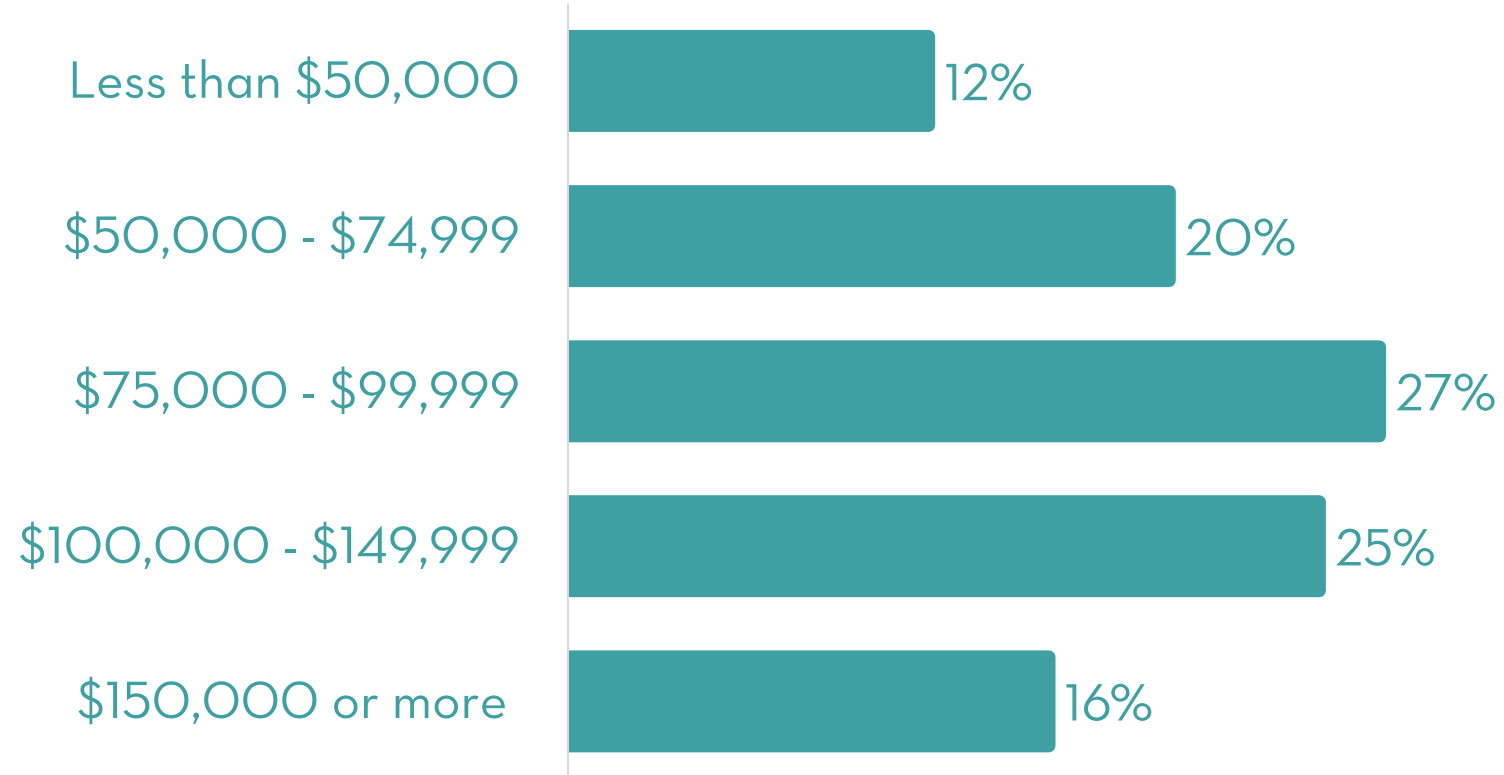


» The median age of visitors to the Ocala/Marion County area was **50**



HOUSEHOLD INCOME

- » Visitors to the Ocala/Marion County area had a median household income of **\$91,700** per year
- » **Over 2 in 5** visitors had household incomes over **\$100,000**

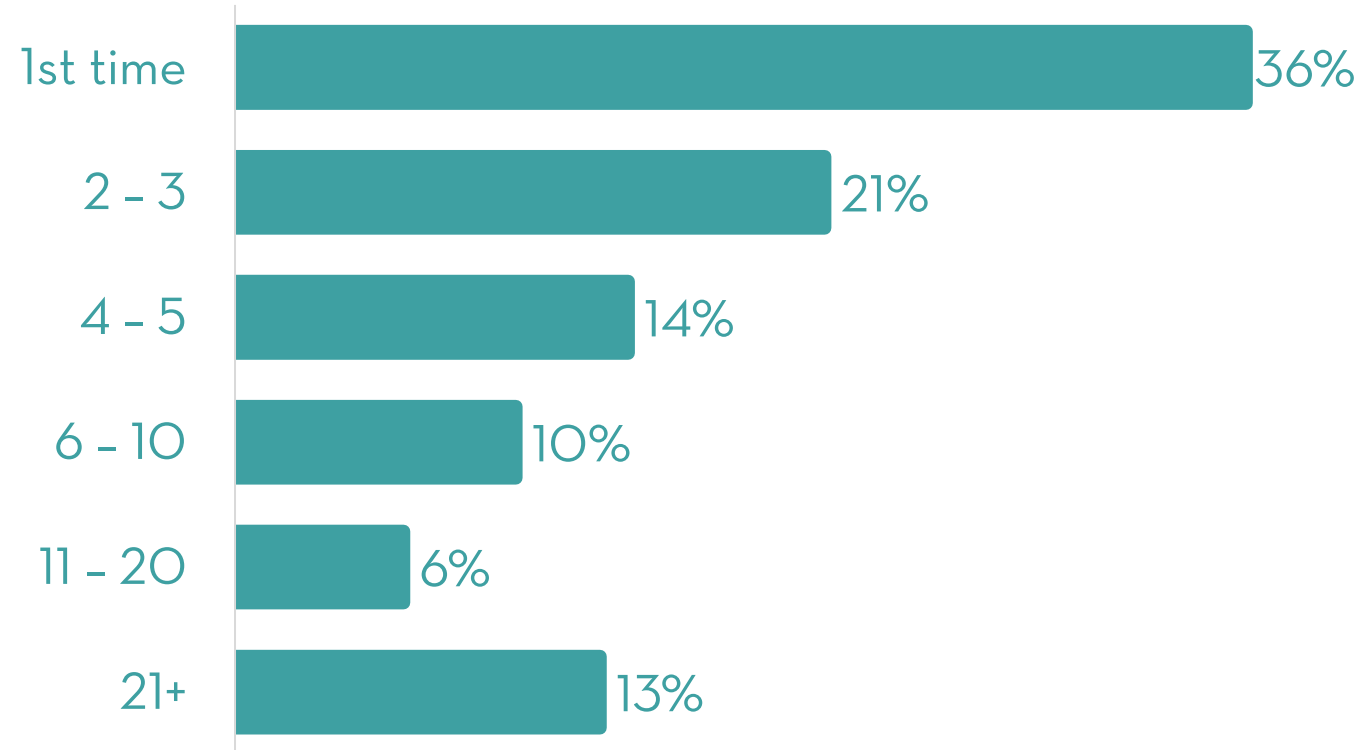


» **51%** of visitors interviewed were **male**



NEW & RETURNING VISITORS

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

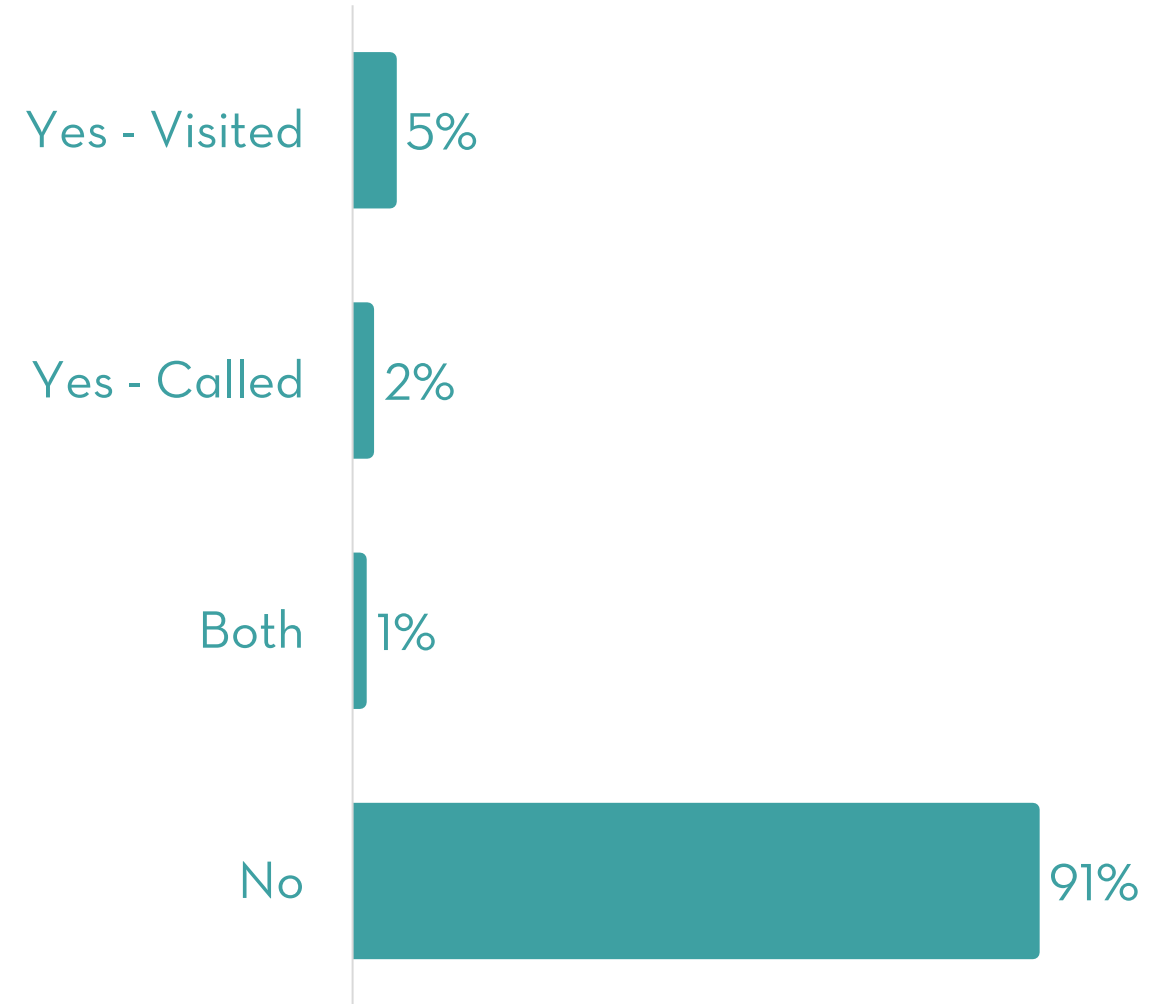


VISITOR JOURNEY: TRIP EXPERIENCE



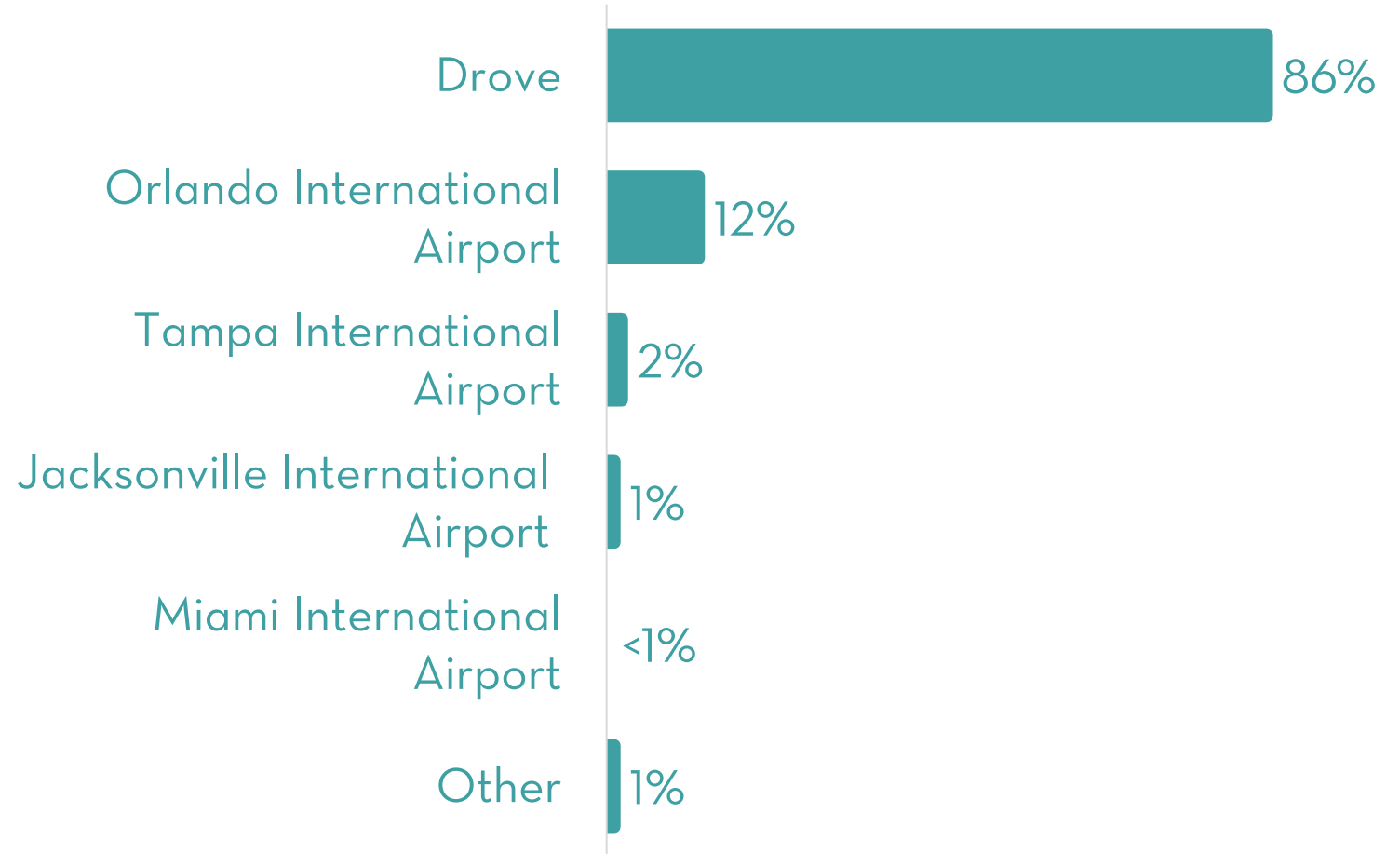
VISITOR CENTER

- » **8%** of visitors **visited or called the Visitor Center**
- » Usefulness Rating: **8.6 out of 10***



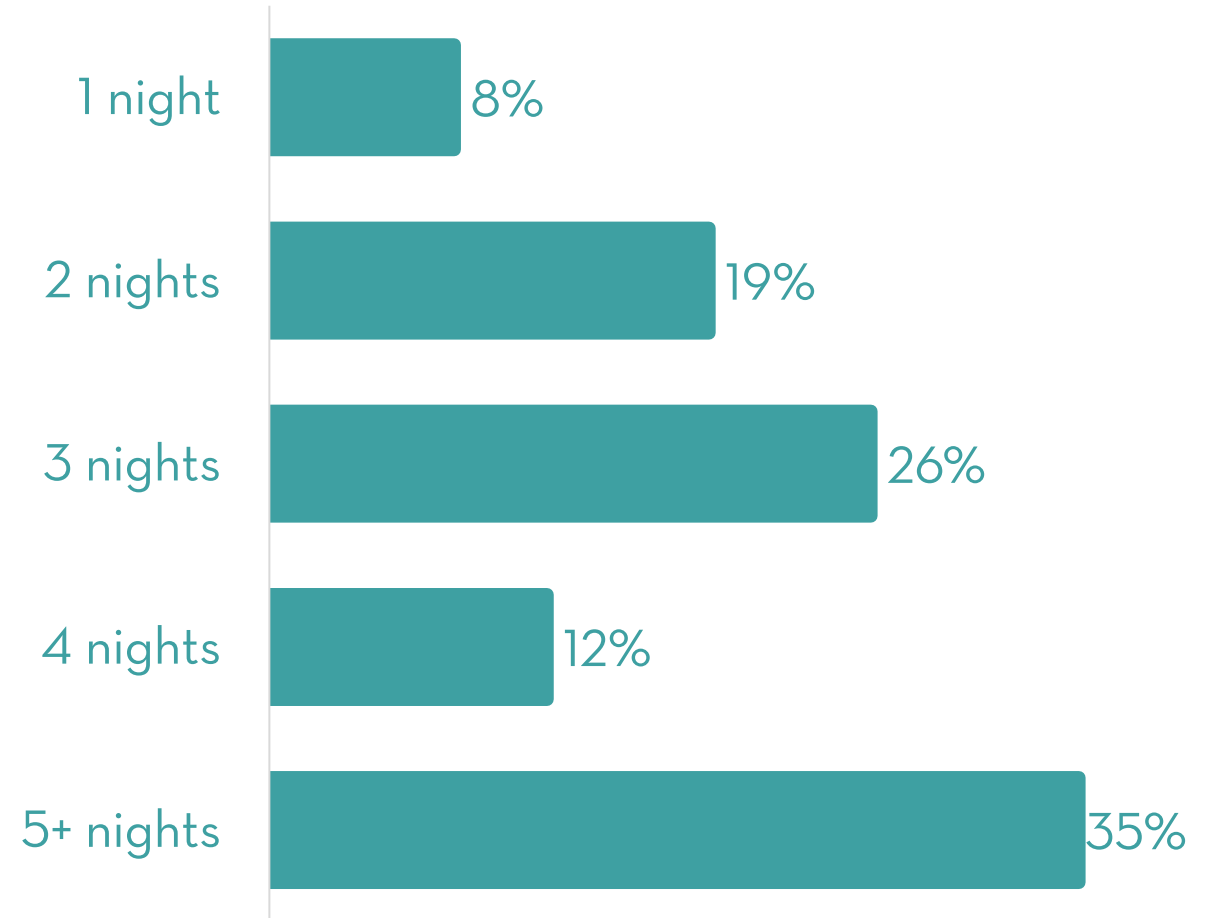
TRANSPORTATION

- » **86%** of visitors **drove** to the Ocala/Marion County area for their trip
- » **12%** of **all** visitors used the **Orlando International Airport**



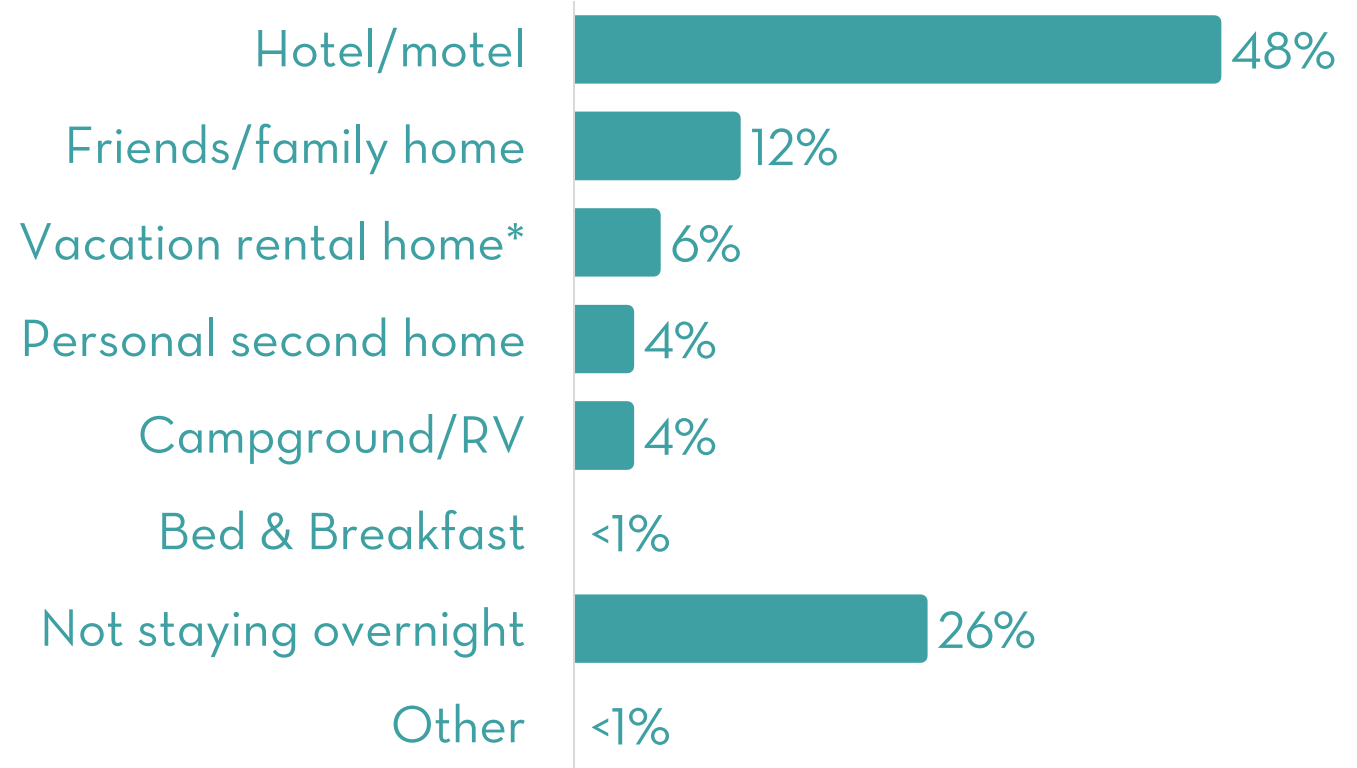
NIGHTS

- » Visitors stayed **3.7** nights in Ocala/Marion County*
- » Visitors staying in paid accommodations stayed **3.8** nights in the Ocala/Marion County area



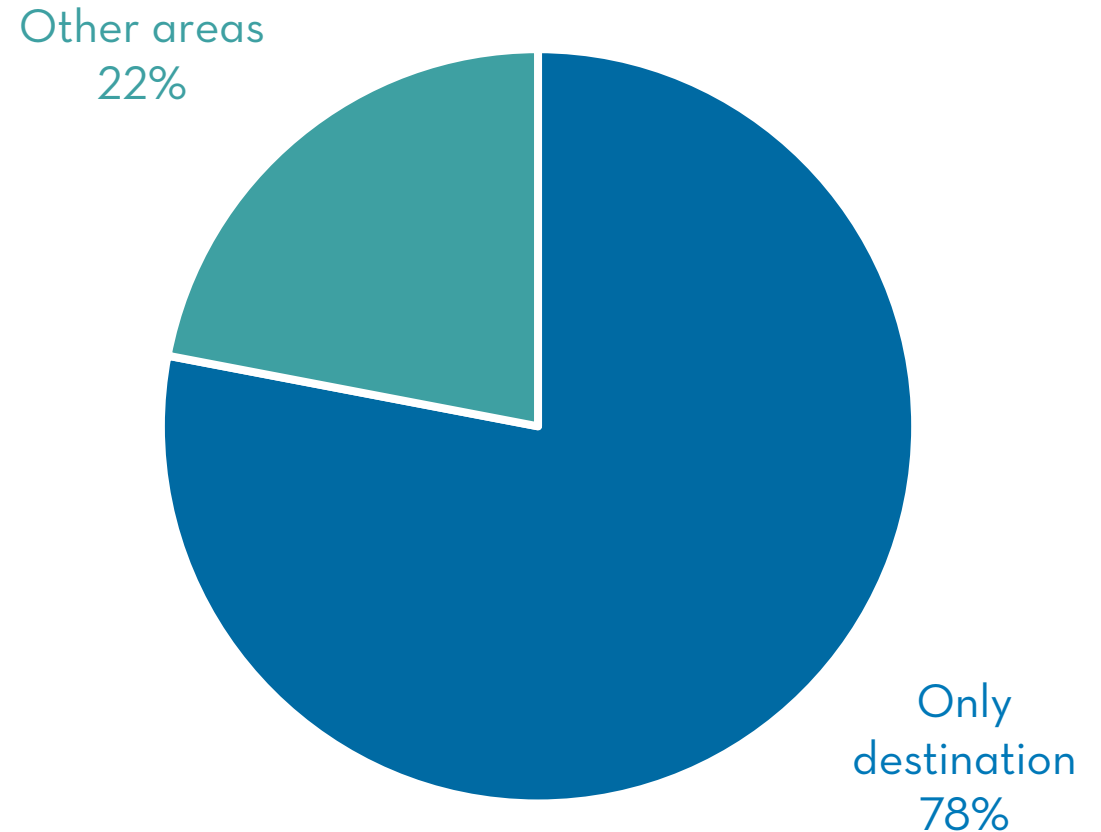
ACCOMMODATIONS

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



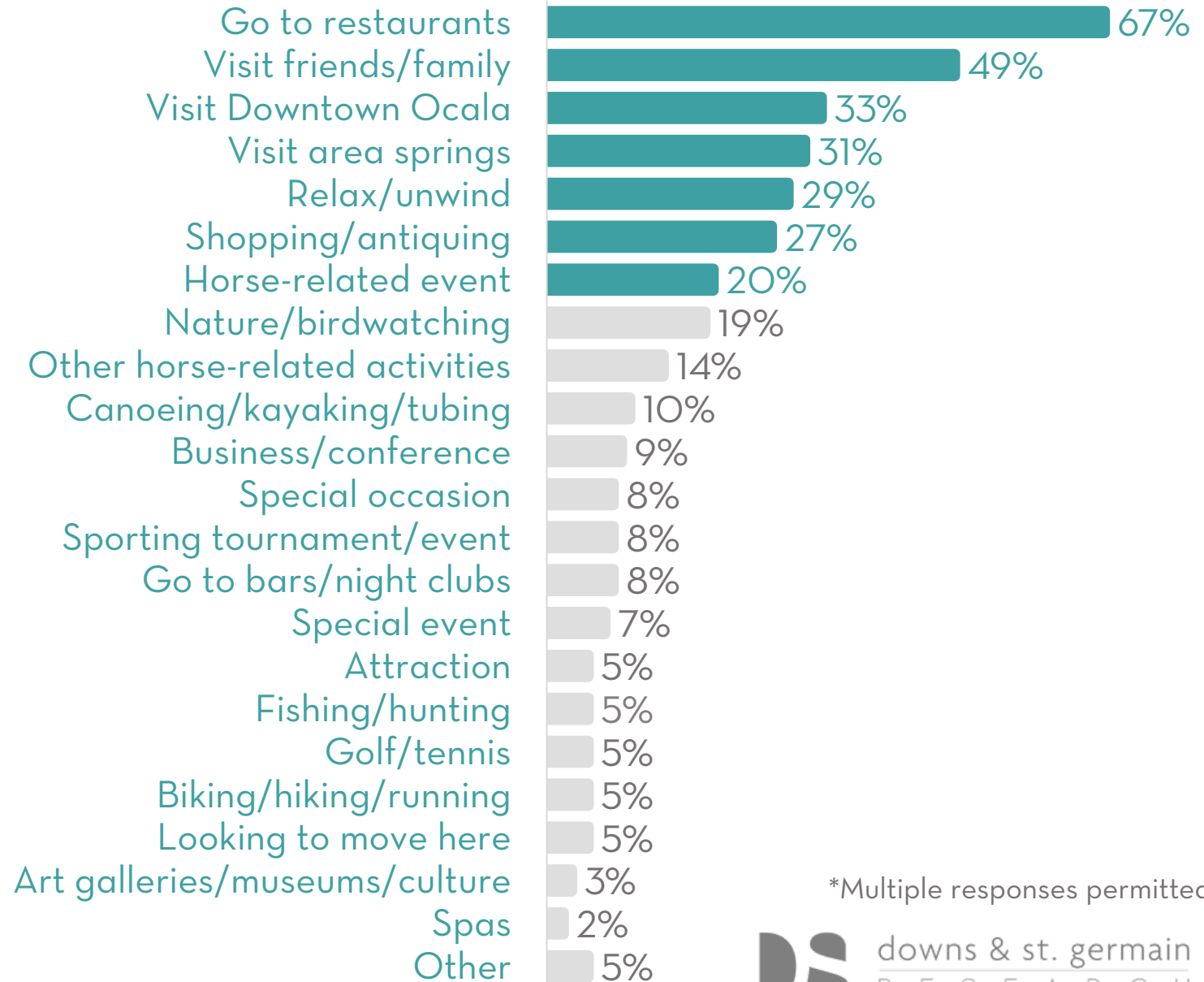
VISITING OTHER AREAS

- » **Over 1 in 5** visitors were also visiting other destinations on their trip



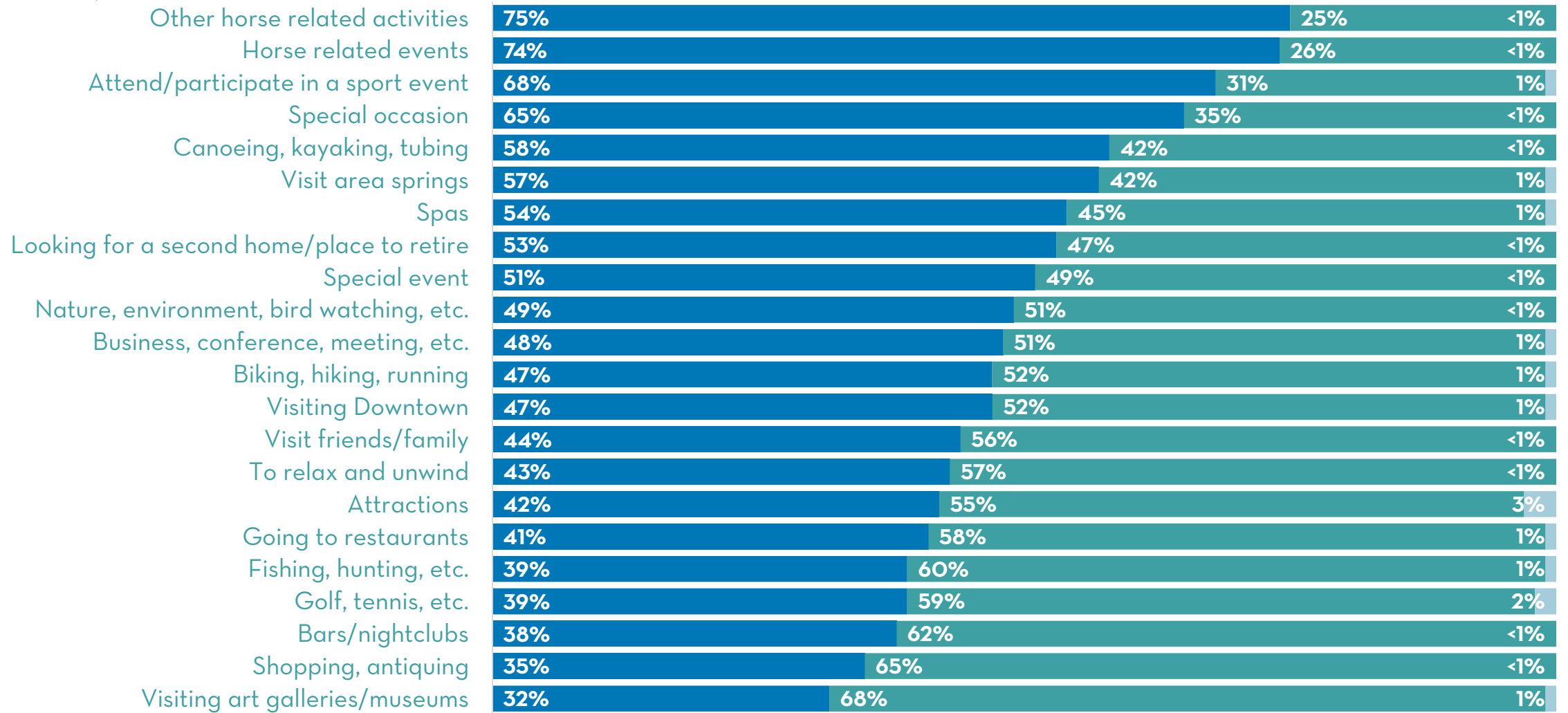
VISITOR ACTIVITIES*

- » **Going to restaurants** is the number one activity, as **2 in 3** visitors went out to eat
- » **Nearly half** of visitors visited **friends and family**
- » **1 in 3** visitors enjoyed **Downtown Ocala** during their visit
- » **About 3 in 10** visitors enjoyed the **area springs, relaxing/unwinding and shopping/antiquing** during their visit

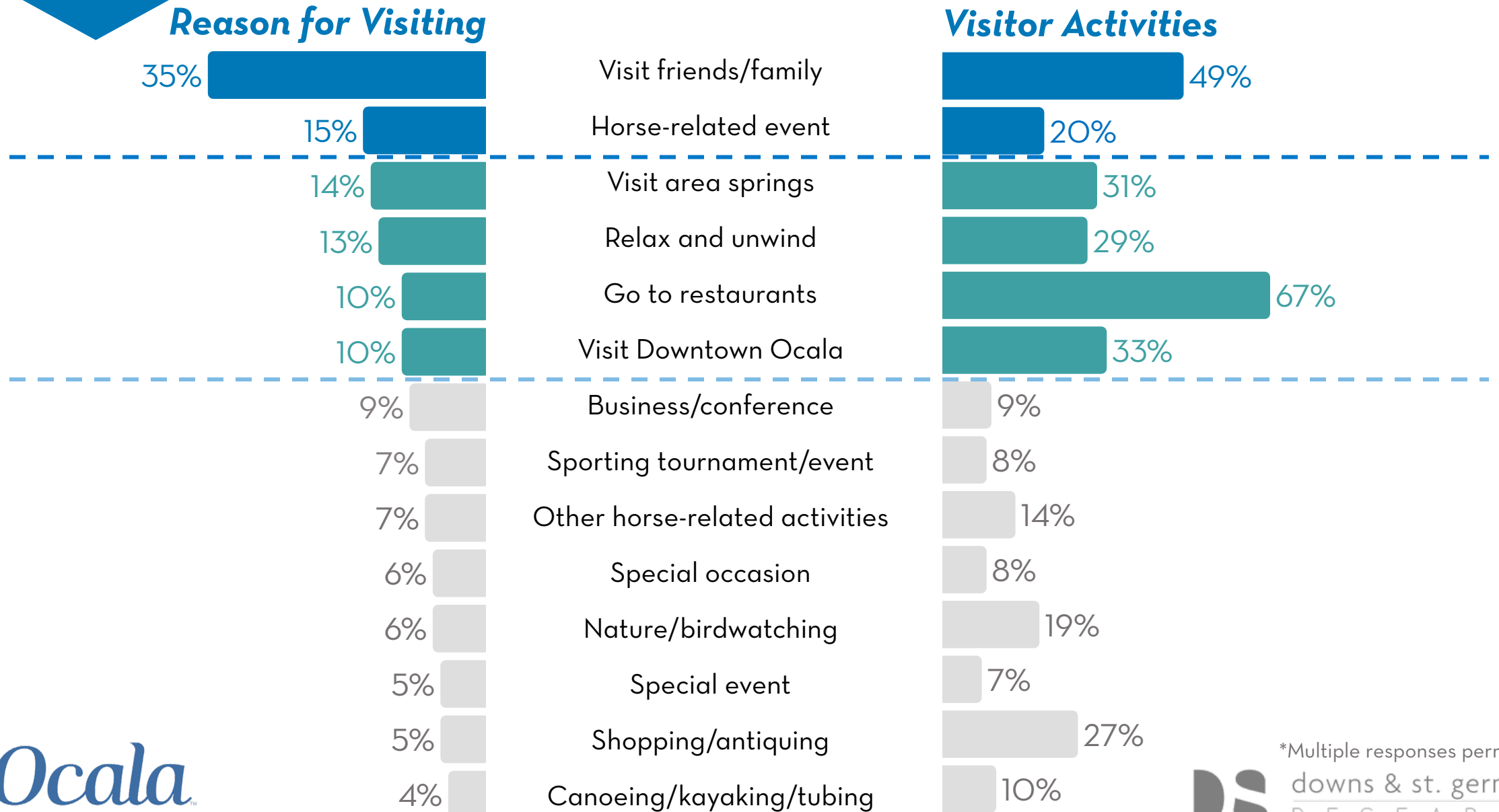


*Multiple responses permitted.

VISITOR ACTIVITY RATINGS



ACTIVITIES VS. REASON FOR VISIT*



TRAVEL PARTY SPENDING

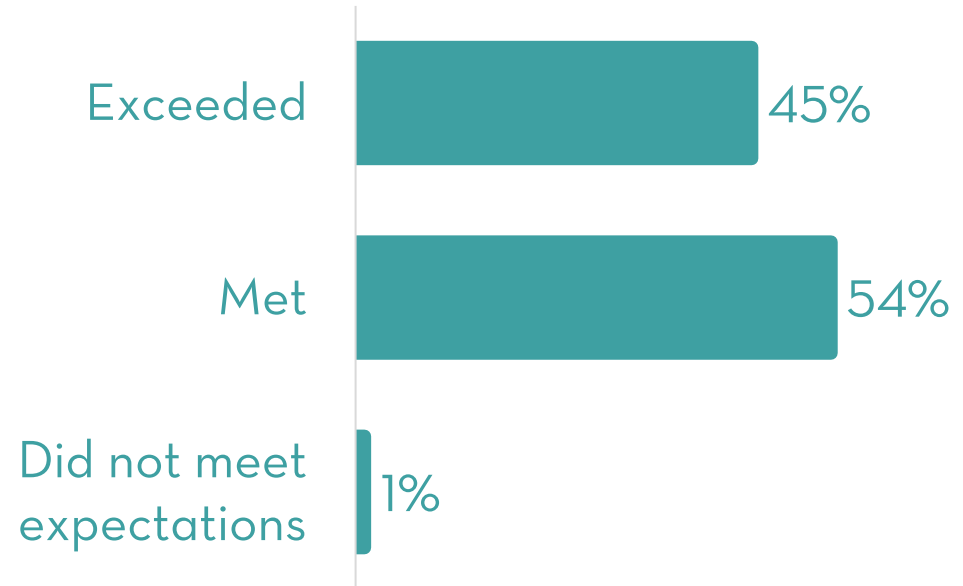
	<i>Daily Spending: All Visitors</i>	<i>Total Spending: All Visitors</i>
<i>Accommodations</i>	<i>\$72¹</i>	<i>\$266</i>
<i>Restaurants</i>	<i>\$82</i>	<i>\$303</i>
<i>Groceries</i>	<i>\$19</i>	<i>\$70</i>
<i>Shopping</i>	<i>\$49</i>	<i>\$181</i>
<i>Entertainment</i>	<i>\$48</i>	<i>\$178</i>
<i>Transportation</i>	<i>\$28</i>	<i>\$103</i>
<i>Other</i>	<i>\$16</i>	<i>\$59</i>
Total	\$314	\$1,160

VISITOR JOURNEY: POST-TRIP



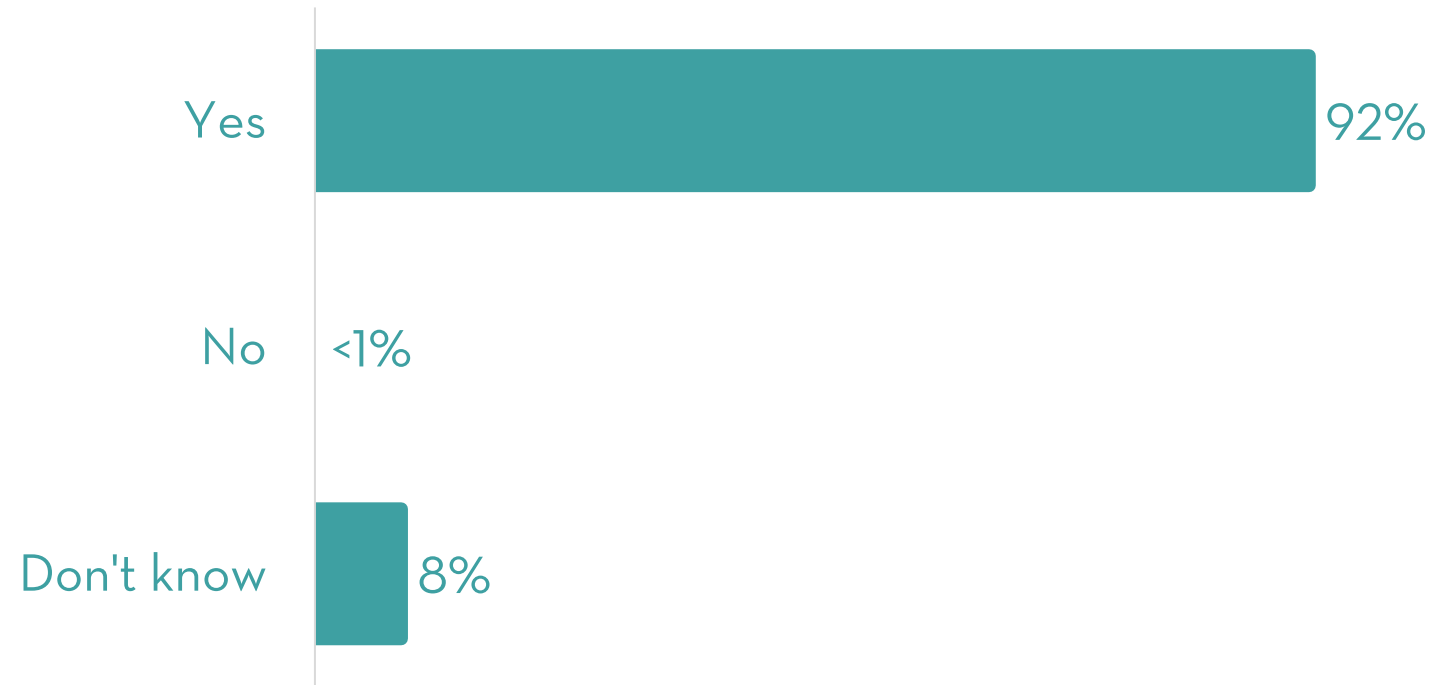
TRIP EXPERIENCE

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



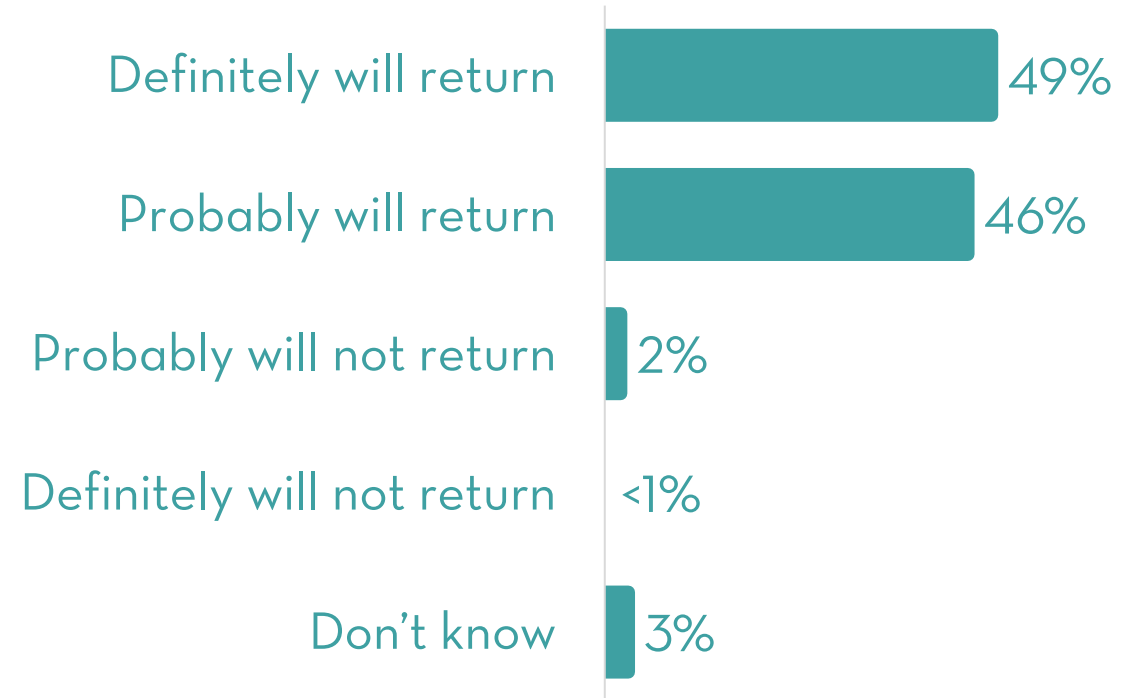
RECOMMENDATION

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



LIKELIHOOD OF RETURNING

- » Nearly **all** 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**



2025 to 2024 COMPARISONS



PRE-VISIT

Visitor Metrics	Apr-Jun 2024	Apr-Jun 2025
<i>Ocala/Marion County was the only destination</i>	<i>73%</i>	<i>78%</i>
<i>Viewed Visitors Guide</i>	<i>8%</i>	<i>16%</i>
<i>Visited or called the Visitors Center</i>	<i>9%</i>	<i>8%</i>
<i>Planned trip a month or less in advance</i>	<i>41%</i>	<i>41%</i>
<i>Average number of days trip was planned in advance of it being taken</i>	<i>73</i>	<i>73</i>
<i>Used OcalaMarion.com to plan their trip</i>	<i>6%</i>	<i>4%</i>
<i>Recalled Ocala/Marion County promotions</i>	<i>27%</i>	<i>33%</i>

PRE-VISIT

Reason for Visiting	Apr-Jun 2024	Apr-Jun 2025
<i>Visit friends/family</i>	30%	35%
<i>Horse-related event</i>	14%	15%
<i>Visit area springs</i>	16%	14%
<i>Relax/unwind</i>	12%	13%
<i>Go to restaurants</i>	8%	10%
<i>Visit Downtown Ocala</i>	9%	10%
<i>Business/conference</i>	8%	9%
<i>Sporting tournament/event</i>	9%	7%
<i>Other horse-related activities</i>	5%	7%
<i>Special occasion</i>	5%	6%
<i>Nature/birdwatching</i>	6%	6%

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

TRAVEL PARTY PROFILE

Top Origin Markets	Apr-Jun 2024	Apr-Jun 2025
<i>Orlando - Daytona Beach - Melbourne</i>	12%	15%
<i>Tampa - St. Petersburg</i>	11%	8%
<i>Jacksonville</i>	5%	7%
<i>Gainesville</i>	4%	6%
<i>Atlanta</i>	5%	5%
<i>Miami - Ft. Lauderdale</i>	5%	3%
<i>New York City*</i>	4%	3%
<i>Tallahassee - Thomasville</i>	2%	3%

Top Origin States	Apr-Jun 2024	Apr-Jun 2025
<i>Florida</i>	48%	48%
<i>Georgia</i>	7%	7%
<i>Ohio</i>	2%	4%
<i>New York</i>	3%	3%
<i>Texas</i>	3%	3%

Top Origin Regions	Apr-Jun 2024	Apr-Jun 2025
<i>Southeast (includes Florida)</i>	70%	70%
<i>Midwest</i>	12%	13%
<i>Northeast</i>	11%	11%
<i>West</i>	5%	3%
<i>International</i>	2%	3%

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

TRIP EXPERIENCE

Visitor Metrics	Apr-Jun 2024	Apr-Jun 2025
<i>Travel party</i>	2.9	2.8
<i>Children <18</i>	36%	36%
<i>Median age</i>	51	50
<i>Estimated median household income</i>	\$79,300	\$91,700
<i>1st time visitor</i>	30%	36%
<i>10+ visits to Ocala/Marion County</i>	20%	19%

Visitor Metrics	Apr-Jun 2024	Apr-Jun 2025
<i>Drove</i>	81%	86%
<i>Nights spent</i>	3.4	3.7
<i>Direct expenditures (entire trip)</i>	\$1,071	\$1,160

TRIP EXPERIENCE

Visitor Activities	Apr-Jun 2024	Apr-Jun 2025
<i>Go to restaurants</i>	49%	67%
<i>Visit friends or family</i>	41%	49%
<i>Visit Downtown Ocala</i>	31%	33%
<i>Visit area springs</i>	33%	31%
<i>Relax and unwind</i>	28%	29%
<i>Shopping/antiquing</i>	20%	27%
<i>Horse-related event</i>	20%	20%
<i>Nature/birdwatching</i>	19%	19%
<i>Other horse-related activities</i>	9%	14%
<i>Business meeting/conference</i>	9%	9%
<i>Canoeing/kayaking/tubing</i>	13%	10%
<i>Special occasion</i>	8%	8%

Visitor Activities	Apr-Jun 2024	Apr-Jun 2025
<i>Sporting tournament/event</i>	9%	8%
<i>Go to bars/night clubs</i>	10%	8%
<i>Special event</i>	7%	7%
<i>Attraction</i>	8%	5%
<i>Fishing/hunting</i>	7%	5%
<i>Golf/tennis</i>	8%	5%
<i>Biking/hiking/running</i>	8%	5%
<i>Looking for a second home/place to retire</i>	9%	5%
<i>Art galleries/museums/cultural events</i>	4%	3%
<i>Spas</i>	2%	2%
<i>Other</i>	8%	5%

POST TRIP EVALUATION

Satisfaction Metrics	Apr-Jun 2024	Apr-Jun 2025
<i>Visit Met + Exceeded expectations</i>	99%	99%
<i>Will return to Ocala/Marion County</i>	96%	95%
<i>Will recommend Ocala/Marion County</i>	91%	92%

Ocala/MARION COUNTY VCB

Economic Impact Study & Visitor Tracking Report April – June 2025

Downs & St. Germain Research
850-906-3111 | www.dsg-research.com
contact@dsg-research.com

