

Ocala/MARION COUNTY VCB

Economic Impact Study &
Visitor Tracking Report
Jan-Mar 2025



STUDY OBJECTIVES: VISITOR JOURNEY



Visitor Tracking Study

- » Interviews were completed in person and online with 853 visitors at local hotels, attractions, and events between January 1, 2025 and March 31, 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
- » MCA & Brick City Center for the Arts
- » Canyon Zipline & Adventure Park
- » Santos Bike Shop
- » WEC
- » FAST Aquatic Center

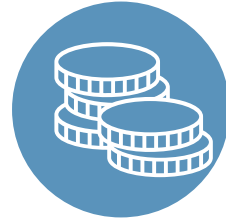
EXECUTIVE SUMMARY



VISITOR JOURNEY: ECONOMIC IMPACT



Jan – Mar 2025 TOURISM SNAPSHOT



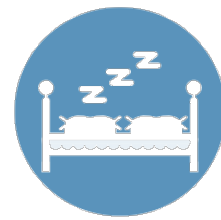
\$1,813,145

TDT
COLLECTIONS



329,100

ROOM
NIGHTS



68.9%

OCCUPANCY
RATE



\$147.12

AVERAGE DAILY
RATE



\$101.31

REVENUE PER AVAILABLE
ROOM

2025 vs. 2024

↑ 16.7%

↑ 2.7%

↑ 2.6%

↑ 2.9%

↑ 5.7%

- » National trends on spending as the economy continues to tighten can be seen in Jan-Mar 2025, especially in the shopping and entertainment spending categories
- » Despite decreases in those staying in unpaid accommodations and day trippers, overall visitation remained flat YOY due to an increase in occupancy and units available.
- » Average Travel party size decreased from 3.1 people in 2024 to 2.9 in 2025.
- » Length of stay decreased from 5.4 nights in 2024 to 4.8 nights in 2025.
- » First time visitation increased from 30% in 2024 to 40% in 2025.

VISITOR & LODGING METRICS

Visitor Statistics ¹	Jan-Mar 2024	Jan-Mar 2025	Percent Change
Visitors ²	346,300	344,300	- 0.6%
Direct Expenditures ³	\$210,040,200	\$202,456,300	- 3.6%
Total Economic Impact	\$325,562,300 ⁴	\$305,073,600 ⁴	- 6.3%

Lodging Statistics ⁵	Jan-Mar 2024	Jan-Mar 2025	Percent Change
Occupancy	67.1%	68.9%	+ 2.6%
Room Rates	\$142.92	\$147.12	+ 2.9%
RevPAR	\$95.89	\$101.31	+ 5.7%
Room Nights	320,300	329,100	+ 2.7%
TDT Collections	\$1,553,568	\$1,813,145	+ 16.7%
Hotel Units	5,012	5,056	+ 0.9%
Vacation Rental Units	235	254	+ 8.1%

¹ National trends on spending as the economy continues to tighten can be seen, especially in the shopping and entertainment categories

² Despite decreases in those staying in unpaid accommodations and day trippers, overall visitation remained flat YOY due to an increase in occupancy and units available.

³ Includes spending for: accommodations, restaurants, entertainment, shopping, transportation, groceries, and "other" expenses.

⁴ Multiplier decreased from 1.55 in Jan-Mar 2024 to 1.51 in Jan-Mar 2025.

⁵ 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 JAN-MAR 2025

- » **Half** of visitors planned their trips to the Ocala/Marion County area **a month or less in advance (-2% points YoY)**
- » Visitors planned their trip **on average of 62 days in advance of their visit (60 days in 2024)**



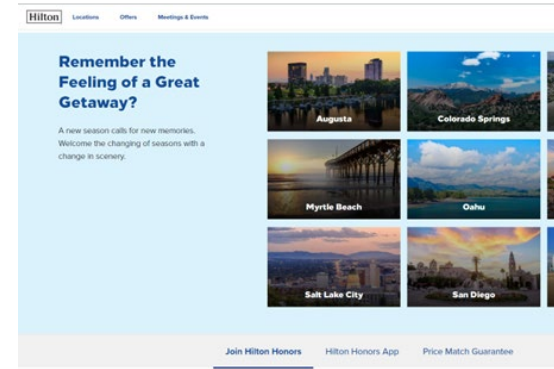
TOP TRIP PLANNING SOURCES JAN-MAR 2025*



52% Talk to friends and family
(+4% points YoY)



46% Search sites
(No change YoY)



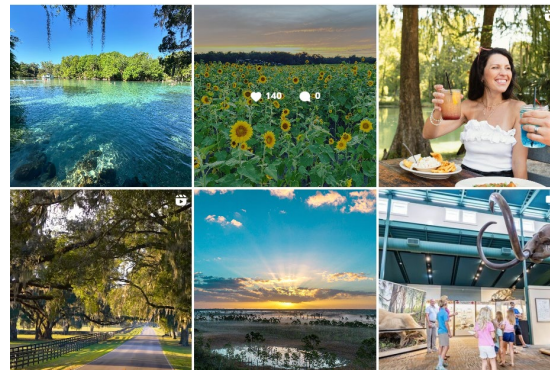
9% Hotel/resort website/app
(-4% points YoY)



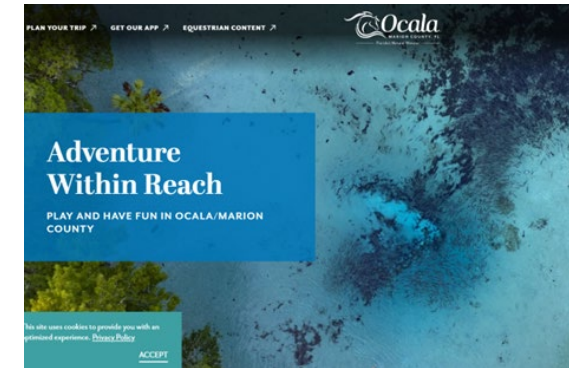
8% Trip planning website/app
(-6% points YoY)



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



7% Destination social media
(-4% points YoY)



6% Online advertisement
(-2% points YoY)

TOP REASONS FOR VISITING JAN-MAR 2025*



28% Visit friends/relatives
(-2% points YoY)



25% Attend horse shows, sales,
events (**No change YoY**)



13% Visit area springs
(+3% points YoY)



11% Business or conference
(+5% points YoY)



8% Sporting tournament/event
(+1% point YoY)



8% Relax/unwind
(-5% points YoY)

PRE-TRIP RECALL OF ADVERTISING JAN-MAR 2025*

- » **28%** of visitors recalled advertising about the Ocala/Marion County area **(+2% points YoY)**
- » **Over 7 in 10** visitors who recalled advertising were influenced by this information to visit the area which represents **20% of all visitors (-1% point YoY)**



SOURCES OF ADVERTISING RECALL JAN-MAR 2025*

Base: **28%** of visitors who recalled advertising



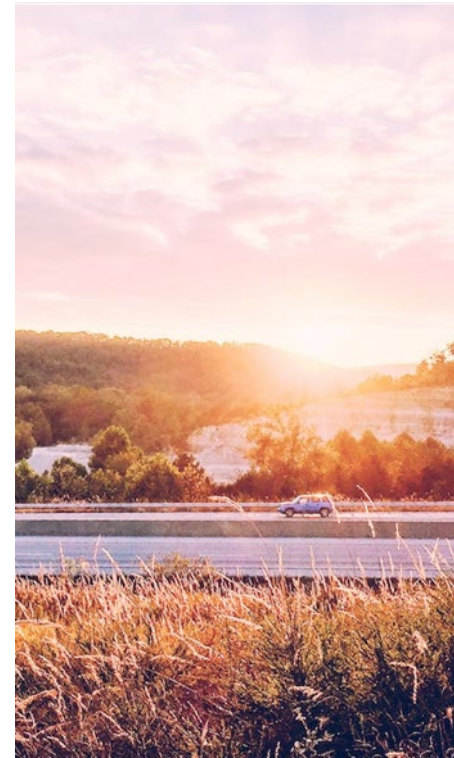
25% Television
(+14% points YoY)



23% Social media
(-6% points YoY)



22% Online
Advertisement
(-8% points YoY)

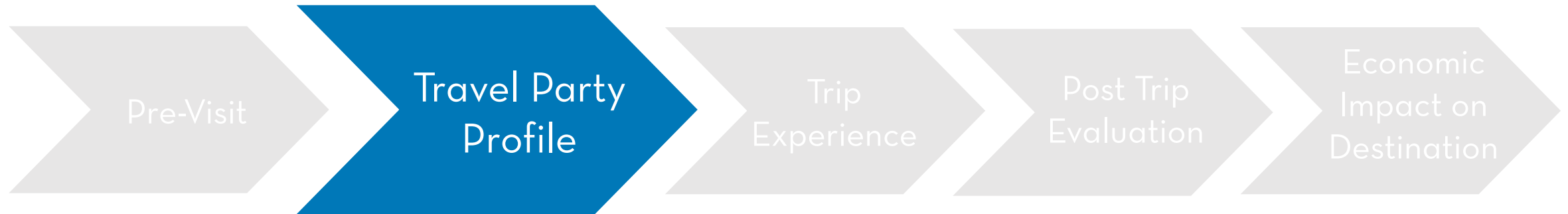


21% Billboard
(-7% points YoY)

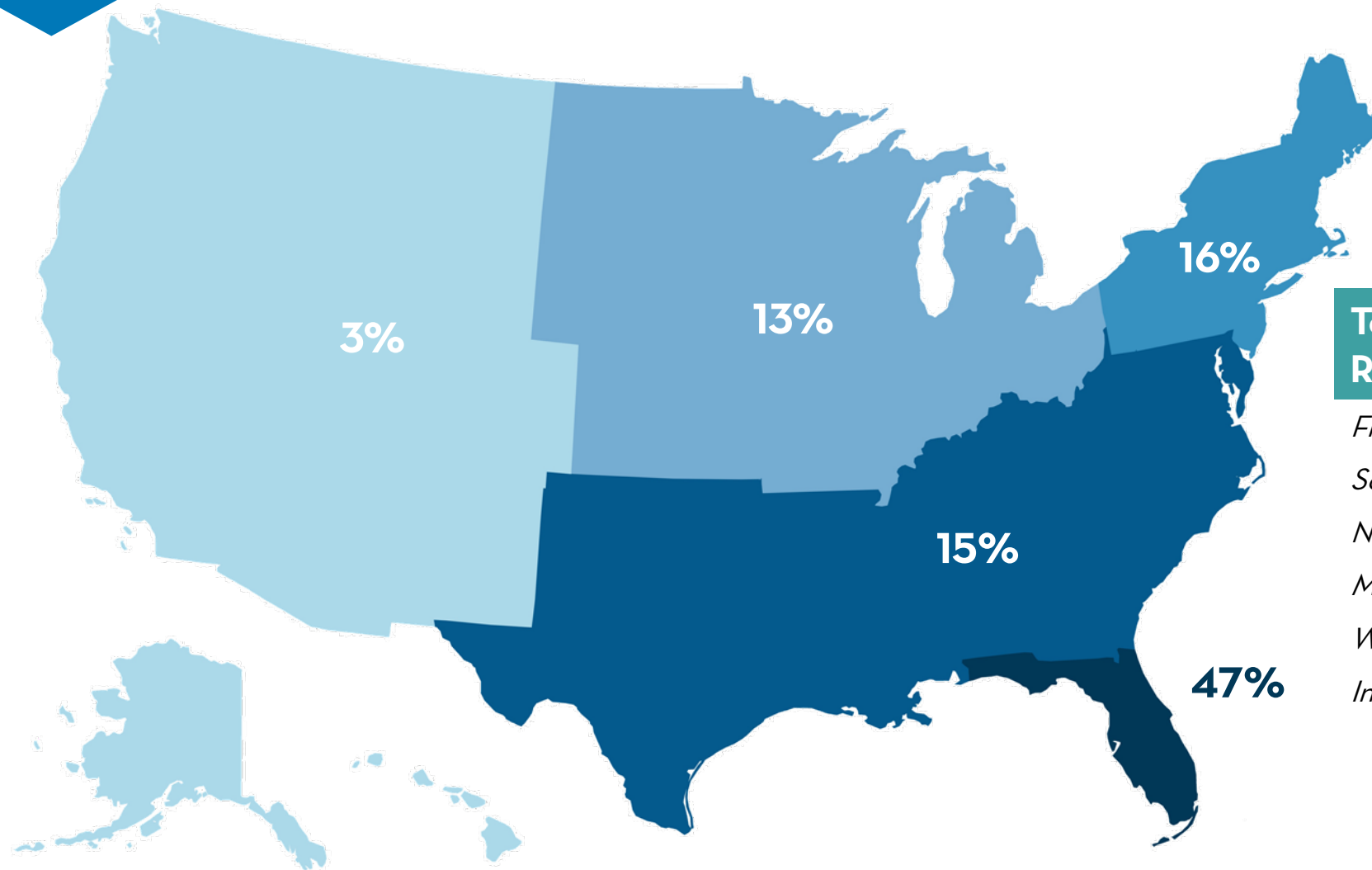


17% Magazine/
newspaper article
(+2% points YoY)

VISITOR JOURNEY: TRAVEL PARTY PROFILE



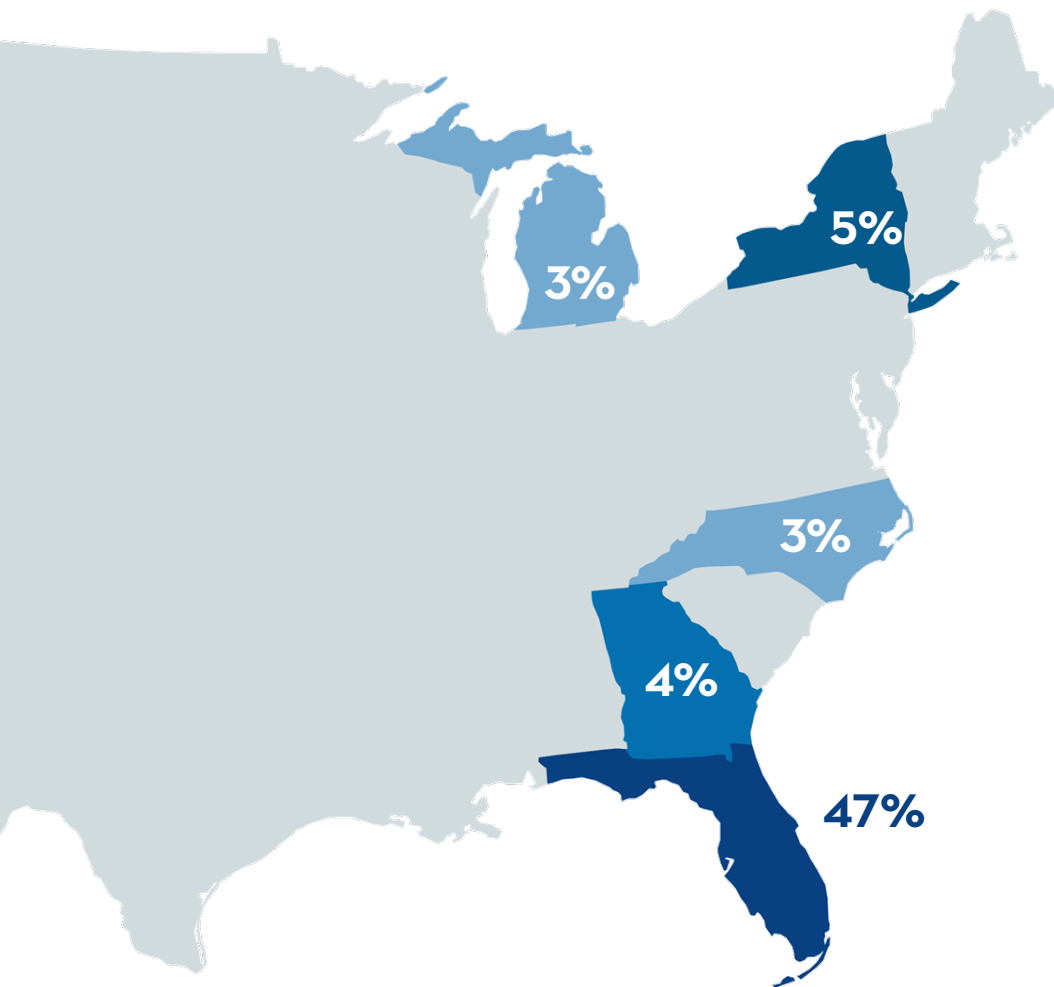
REGIONS OF ORIGIN JAN-MAR 2025



Top Origin Regions	% Difference YoY
Florida	+8% points
Southeast	-2% points
Northeast	-2% points
Midwest	-4% points
West	-1% point
International	+1% point

6% of visitors traveled to the Ocala/Marion County area from outside of the U.S.

TOP STATES OF ORIGIN JAN-MAR 2025



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

- **47%** Florida (+8% points YoY)
- **5%** New York (No change YoY)
- **4%** Georgia (+1% point YoY)
- **3%** Michigan (-1% point YoY)
- **3%** North Carolina (No change YoY)

TOP ORIGIN MARKETS JAN-MAR 2025



15% Orlando – Daytona Beach
– Melbourne **(+1% point YoY)**



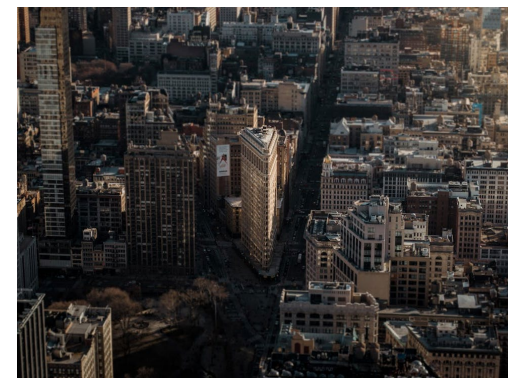
7% Tampa – St. Petersburg
(No change YoY)



7% Gainesville
(+3% points YoY)



6% Jacksonville
(+1% point YoY)



5% New York City **(-1%
point YoY)**

TRAVEL PARTIES JAN-MAR 2025

- » The typical visitor traveled in a party size of **2.9** people (**3.1 in 2024**)



- » **40%** traveled with at least one person under the age of 18 (**-2% points YoY**)



VISITOR PROFILE JAN-MAR 2025

- » The typical Ocala/Marion County area visitor:
 - » Is **51** years old (**51 in 2024**)
 - » Has a household income of **\$102,000** per year (**\$89,300 in 2023**)



NEW & RETURNING VISITORS JAN-MAR 2025

- » **2 in 5** were first-time visitors to the Ocala/Marion County area **(+10% points YoY)**
- » **Over 1 in 8** visitors were loyalists, having visited over 10 times **(-6% points YoY)**



VISITOR JOURNEY: TRIP EXPERIENCE



- » **77%** of visitors **drove** to the Ocala/Marion County area **(-2% points YoY)**
- » **14%** of visitors flew via the **Orlando International Airport** **(-1% point YoY)**



VISITOR BEHAVIOR JAN-MAR 2025

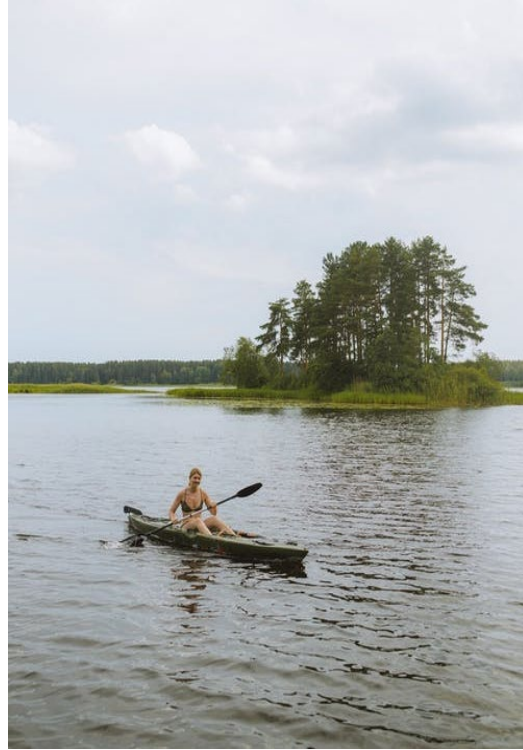
- » Typical visitors spent **4.8** nights in Ocala/Marion County area* (**5.4 in 2024**)
- » **Over 2 in 3** visitors were only visiting Ocala/Marion County during their trip (**+2% points YoY**)



TOP ACCOMMODATIONS JAN-MAR 2025



44% Hotel/motel/resort
(+4% points YoY)



26% Day tripper
(-1% point YoY)



14% Friends' or
relatives' home
(-2% points YoY)



7% Vacation rental home*
(+1% point YoY)

TOP ACTIVITIES DURING VISIT JAN-MAR 2025*



70% Dining out
(+6% points YoY)



41% Visit family/friends
(-5% points YoY)



33% Visit Downtown
Ocala (+4% points YoY)



32% Attend horse shows,
sales, events (-8% points YoY)



31% Visit area springs
(+4% points YoY)

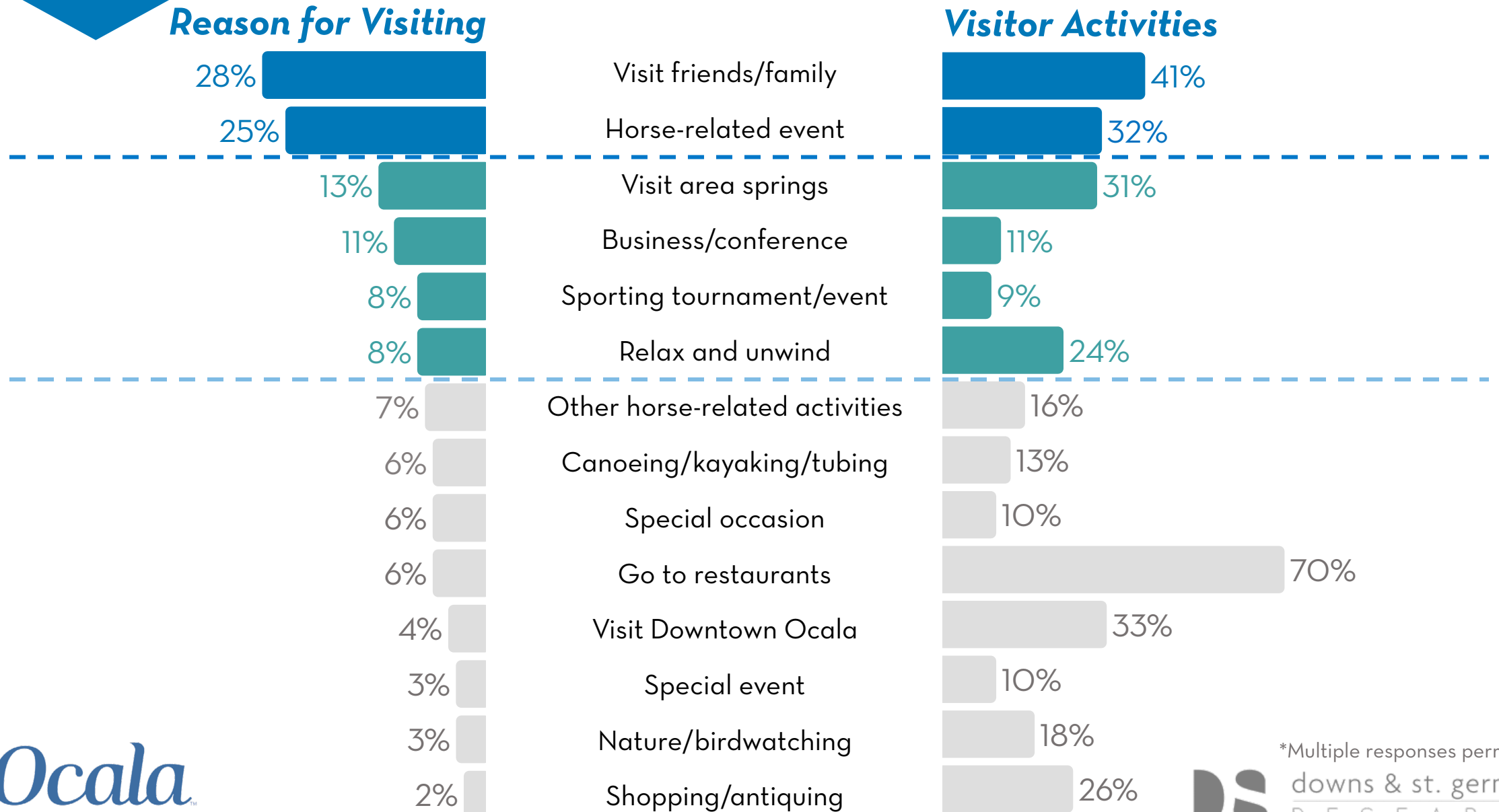


26% Shopping
(+2% points YoY)

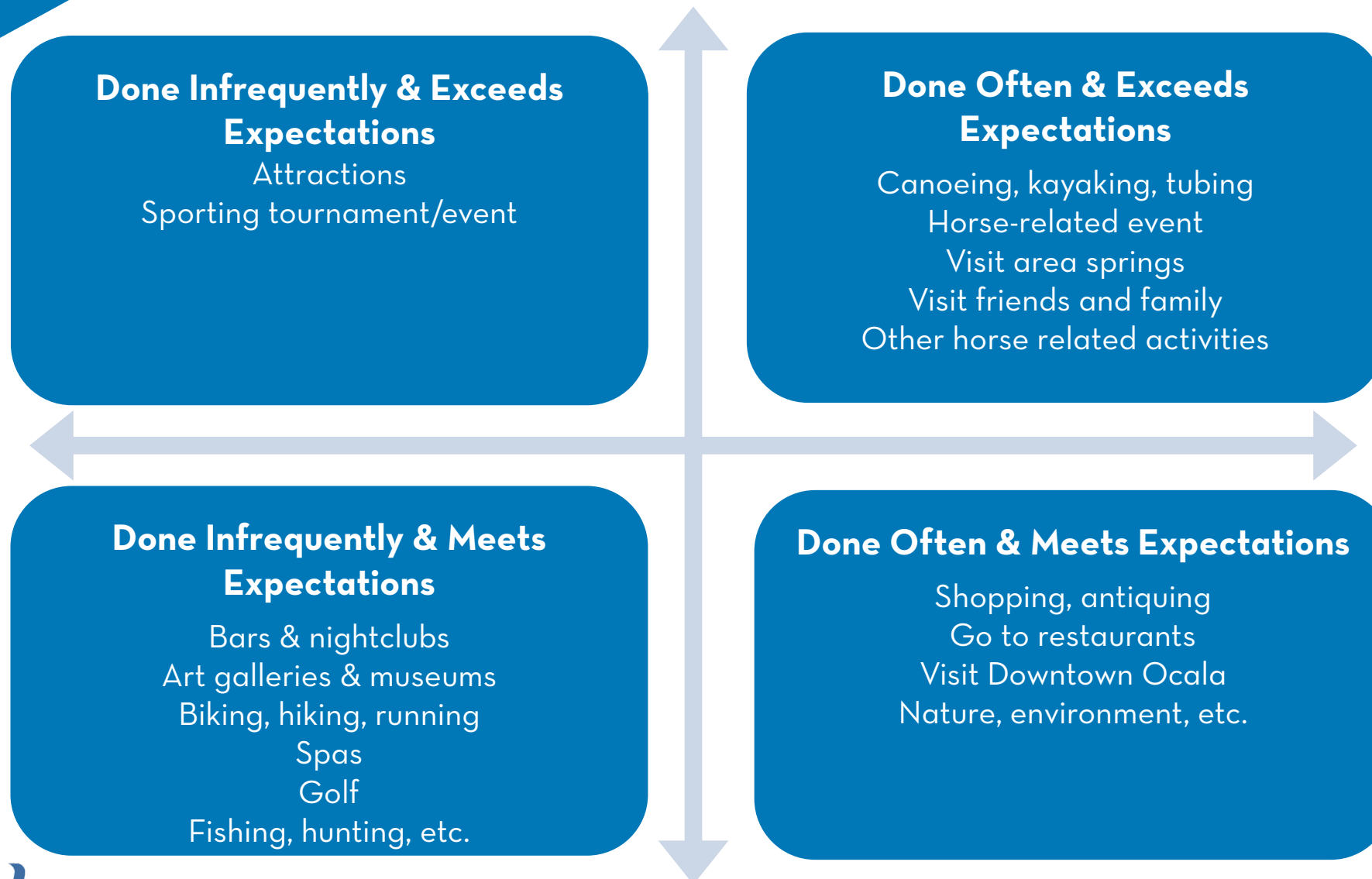


24% Relax & unwind
(-8% points YoY)

ACTIVITIES VS. REASON FOR VISIT JAN-MAR 2025*



QUADRANT ANALYSIS JAN-MAR 2025



TRAVEL PARTY SPENDING JAN-MAR 2025

- » Travel parties spent **\$335 (\$338 in 2024)** per day and **\$1,608 (\$1,814 in 2024)** during their trip



VISITOR JOURNEY: POST-TRIP



VISITOR SATISFACTION JAN-MAR 2025

- » **99%** of visitors said their visit met or exceeded expectations with **37%** exceeded expectations (**No change YoY**)
- » **90%** will recommend Ocala/Marion County to a friend (**-2% points YoY**)
- » **94%** will return to Ocala/Marion County with **51%** saying they will definitely return (**-10% points YoY**)



AREA DESCRIPTIONS JAN-MAR 2025



"We come here every year to visit grandchildren. Ocala is quiet but growing and very beautiful. Lots to do; we are at a very nice swim facility on the west side of town, which is very impressive."



"Ocala is rural, pretty, and has great weather. It was good to visit with long-lost family. The area has certainly grown since I was last here."



"I would say it's a very southern atmosphere; lots of country fields, winding roads, and horses. Very relaxing, but then the downtown area is fun for finding restaurants and just things to do."



DETAILED FINDINGS

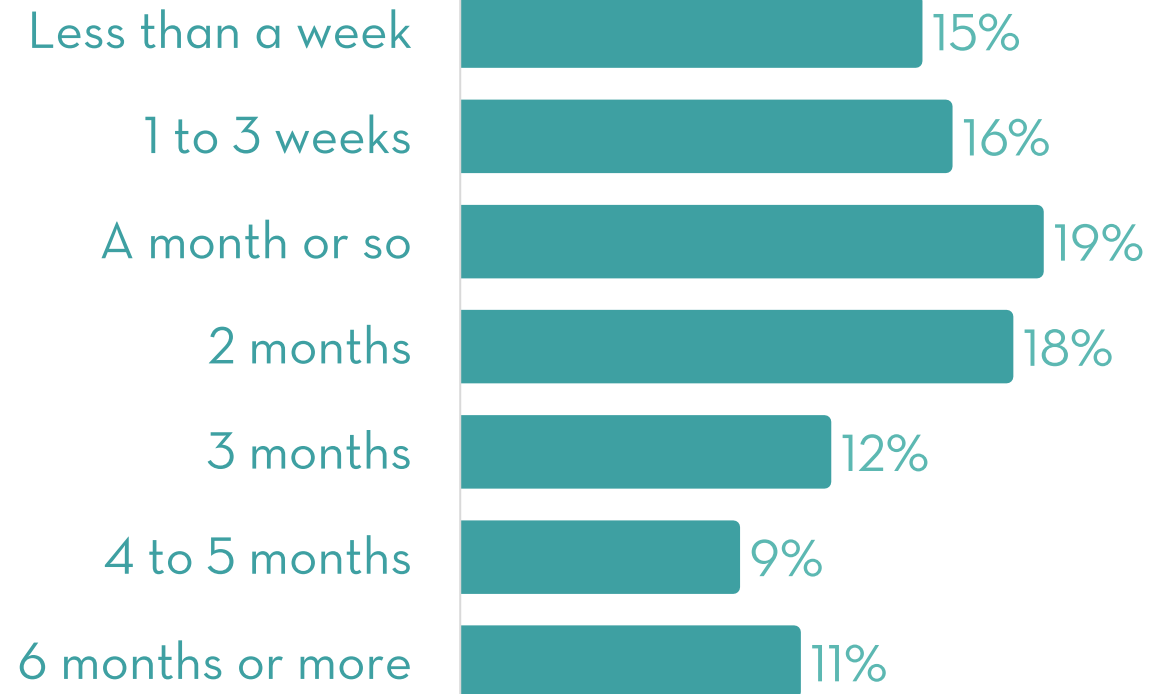


VISITOR JOURNEY: PRE-VISIT



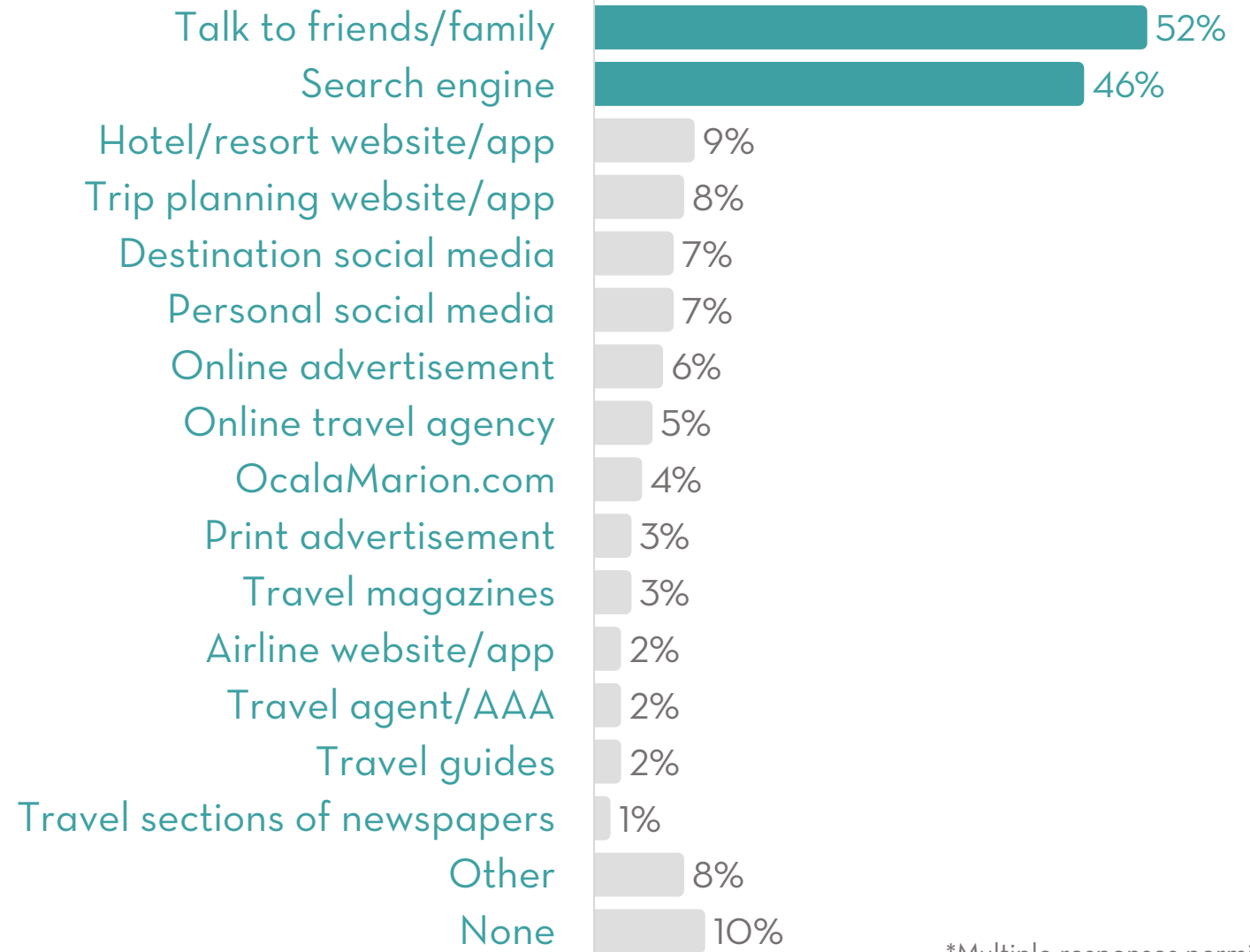
TRIP PLANNING CYCLE

- » **Half** of visitors planned their trips to the Ocala/Marion County area **a month or less in advance**
- » On the other hand, **nearly 1 in 3** visitors planned their trips **at least 3 months in advance**
- » Visitors planned their trip **on average 62 days in advance**



TRIP PLANNING SOURCES*

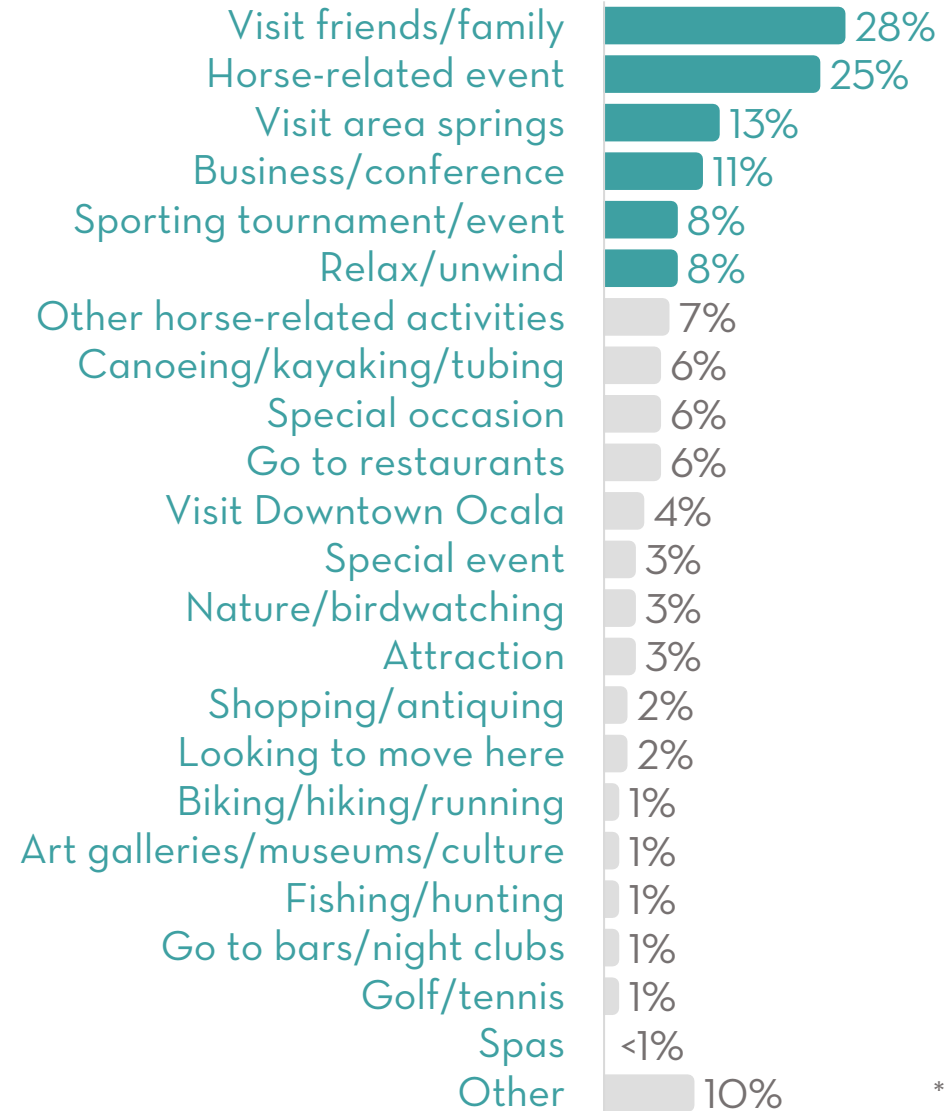
- » **Talking to friends** is the **top planning source** for trips to Ocala/Marion County
- » **Over 2 in 5** visitors used a **search engine (i.e., Google)** to plan their trip



*Multiple responses permitted

REASONS FOR VISITING*

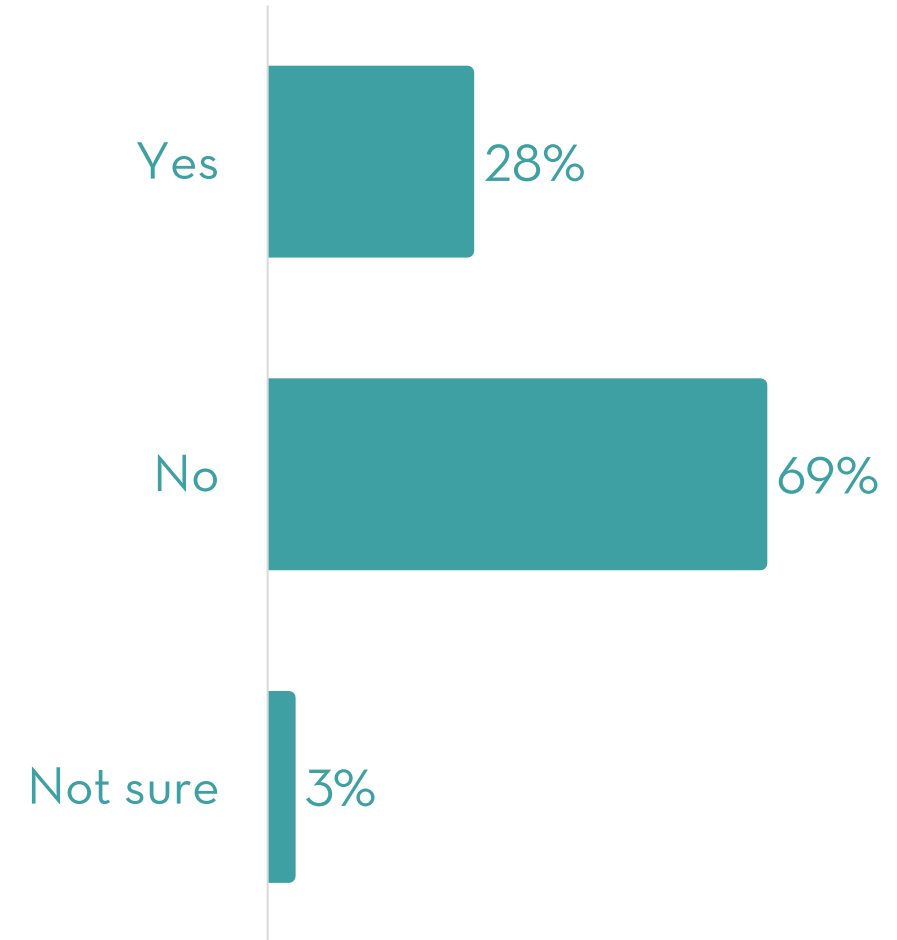
- » **Visiting friends and relatives and horse-related events** are the **top two** choices for coming, as **over 1 in 4** visitors came to Ocala/Marion County for this reason
- » **1 in 8** visitors came to Ocala/Marion County for **area springs**



RECALL OF ADVERTISING*

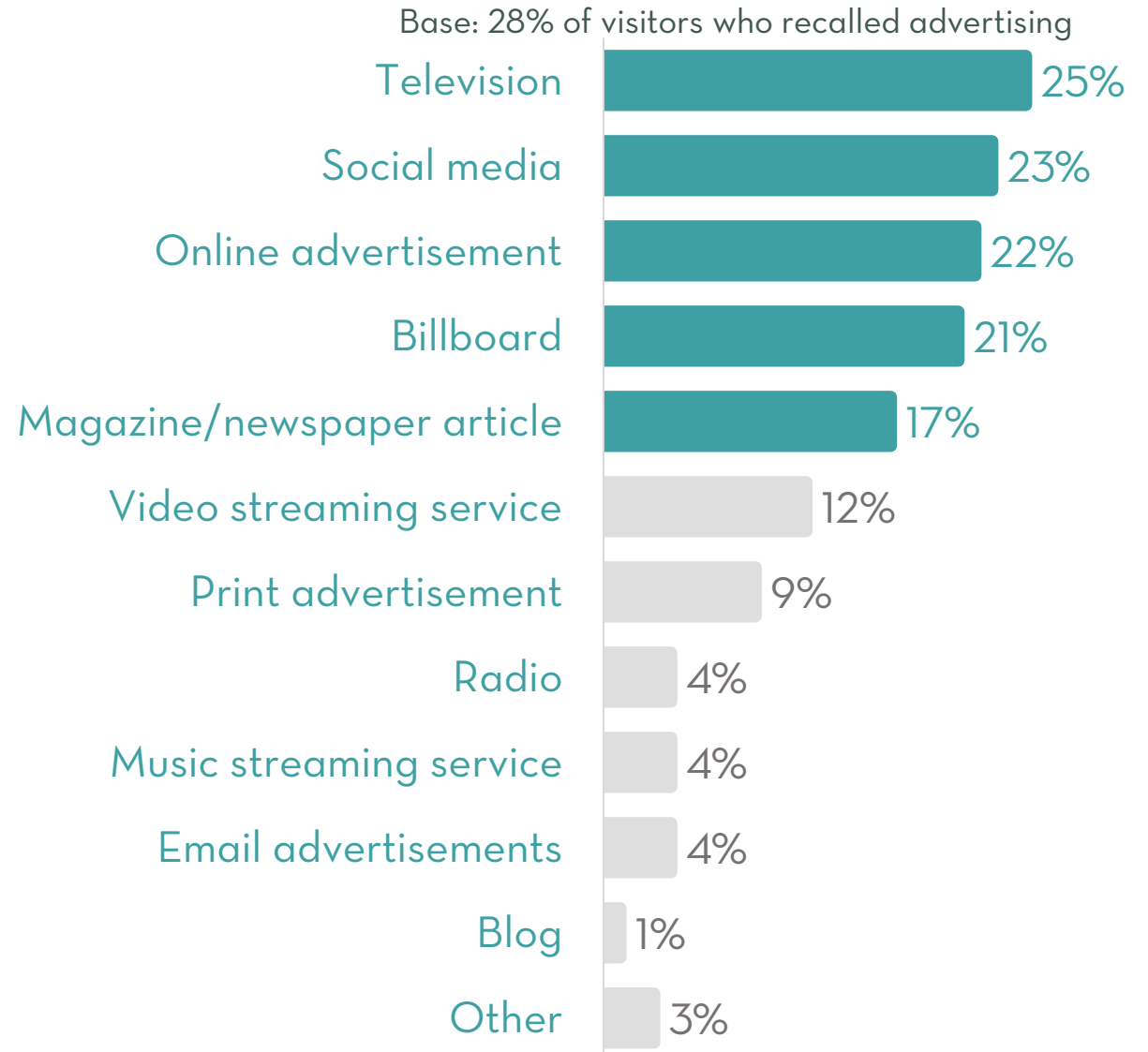
- » **Nearly 3 in 10** visitors recalled advertising about the Ocala/Marion County area
- » Of the visitors who recalled advertising, **over 7 in 10 (representing 20% of all visitors)** were influenced by this information to come to the area

Recalled Advertising



ADVERTISING SOURCE*

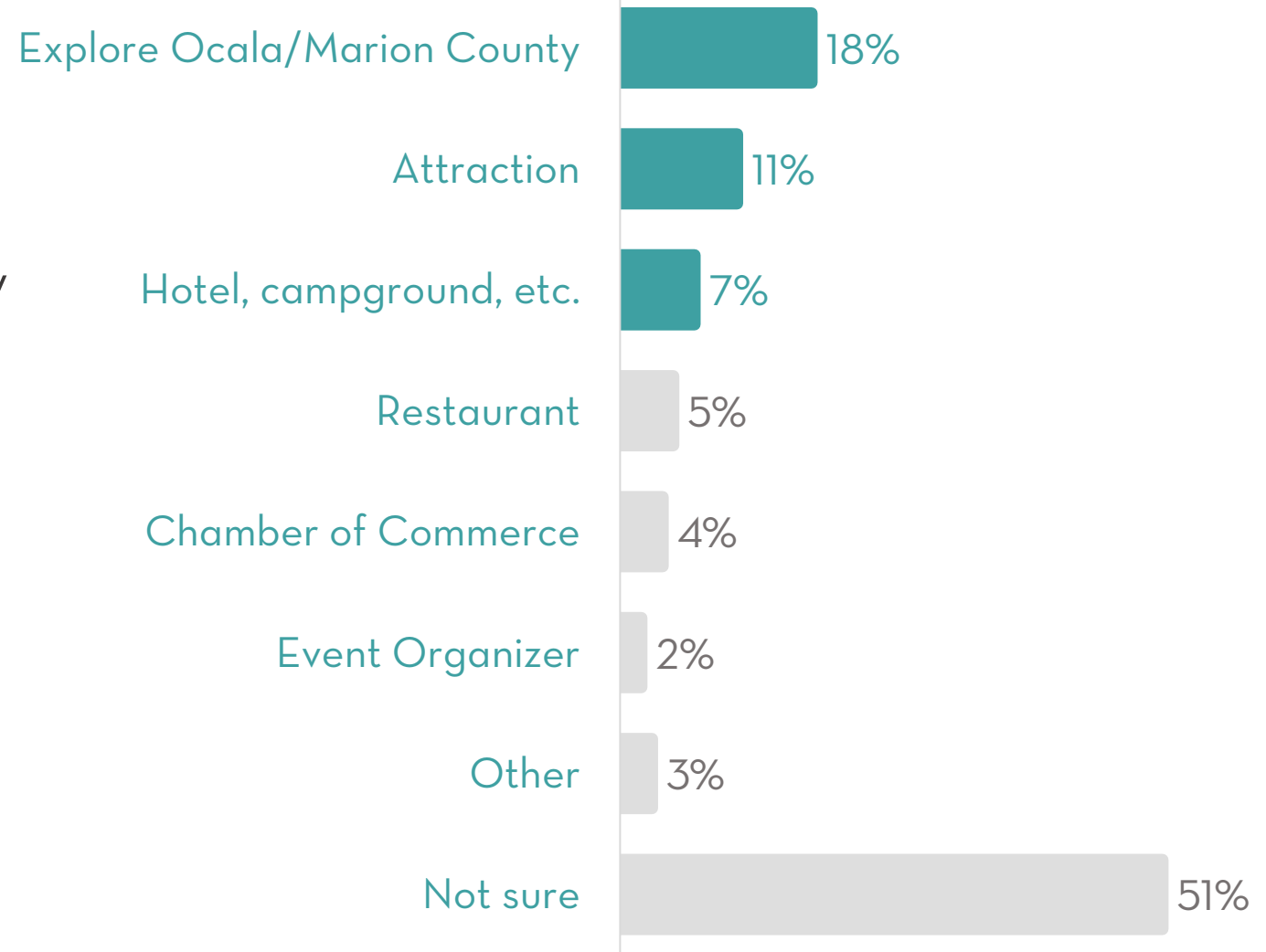
- » **1 in 4** visitors who recalled advertising for the Ocala/Marion County area recalled advertisements on **television**
- » **Over 1 in 5** visitors recalled **social media, online advertisements and billboards****



SPONSORED ADVERTISEMENT*

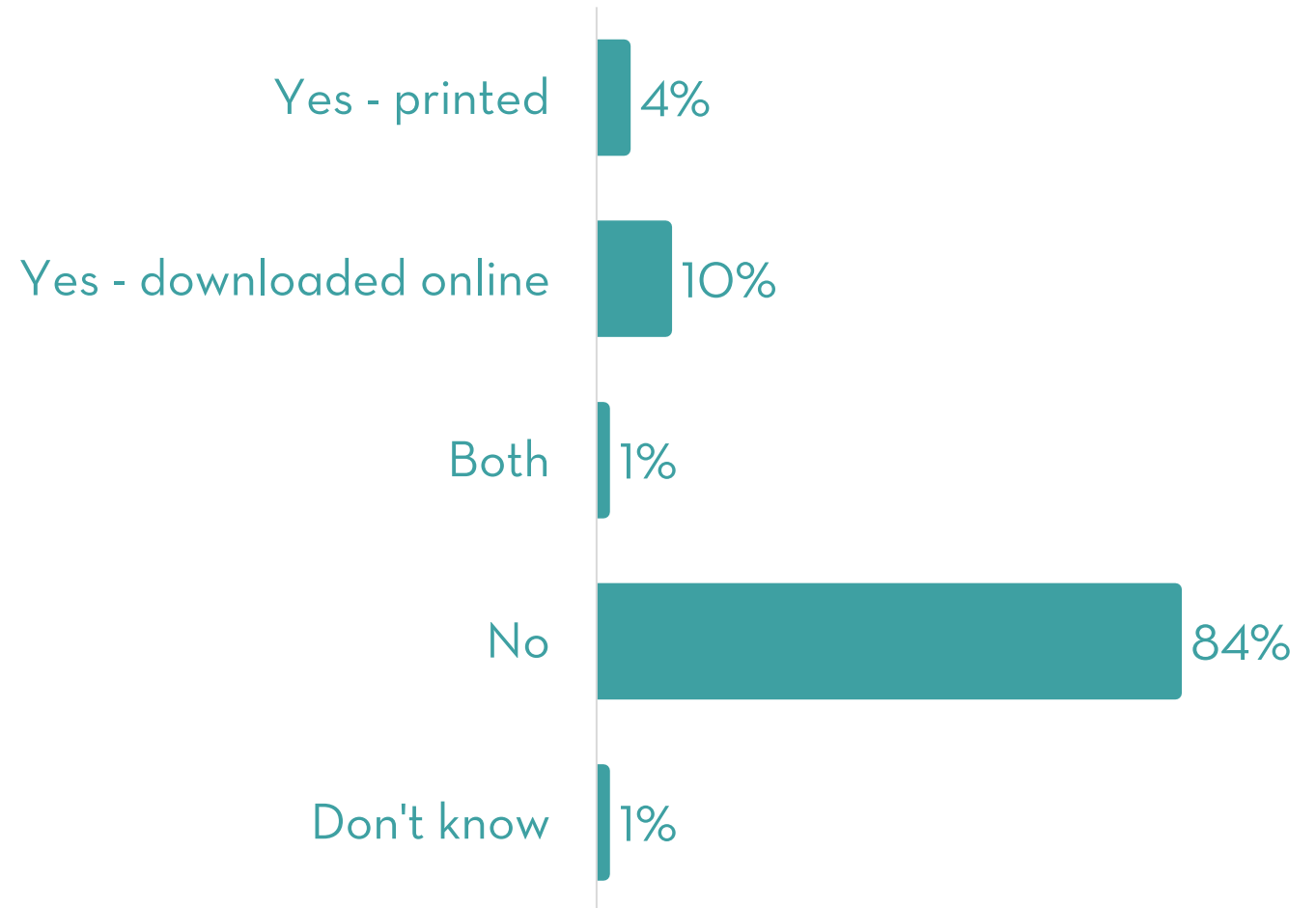
- » **Nearly 1 in 5** visitors who recalled advertising for the Ocala/Marion County area recall **Explore Ocala/Marion County** as a sponsor of the advertisement
- » **1 in 10** visitors stated that they recalled advertisements sponsored by **an attraction**.

Base: 28% of visitors who recalled advertising

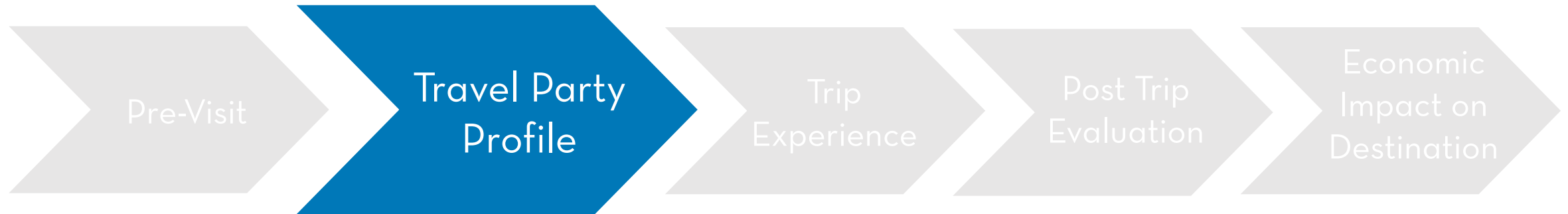


VISITOR GUIDE

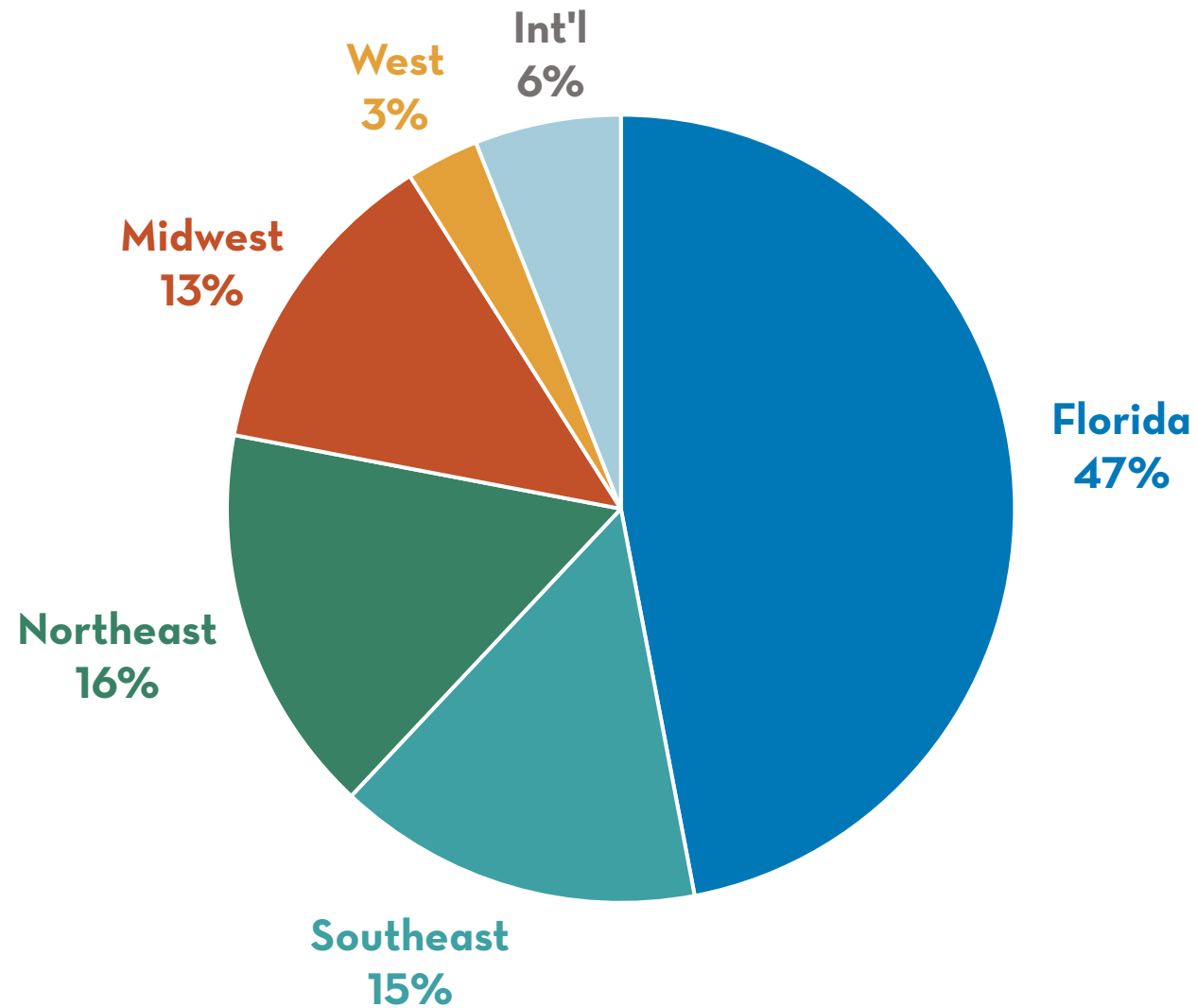
- » **15%** of visitors viewed the **print and/or online visitor guide**
- » Usefulness Rating: **8.1 out of 10***



VISITOR JOURNEY: TRAVEL PARTY PROFILE



REGION OF ORIGIN



TOP ORIGIN STATES

- » **Over 3 in 4** visitors came to Ocala/Marion County from 13 states
- » **Florida** was the key origin state for the Ocala/Marion County area

State	Percent
Florida	47%
New York	5%
Georgia	4%
Michigan	3%
North Carolina	3%
Illinois	2%
Maryland	2%
New Jersey	2%
Ohio	2%
Pennsylvania	2%
Tennessee	2%
Texas	2%
Virginia	2%

TOP ORIGIN MARKETS

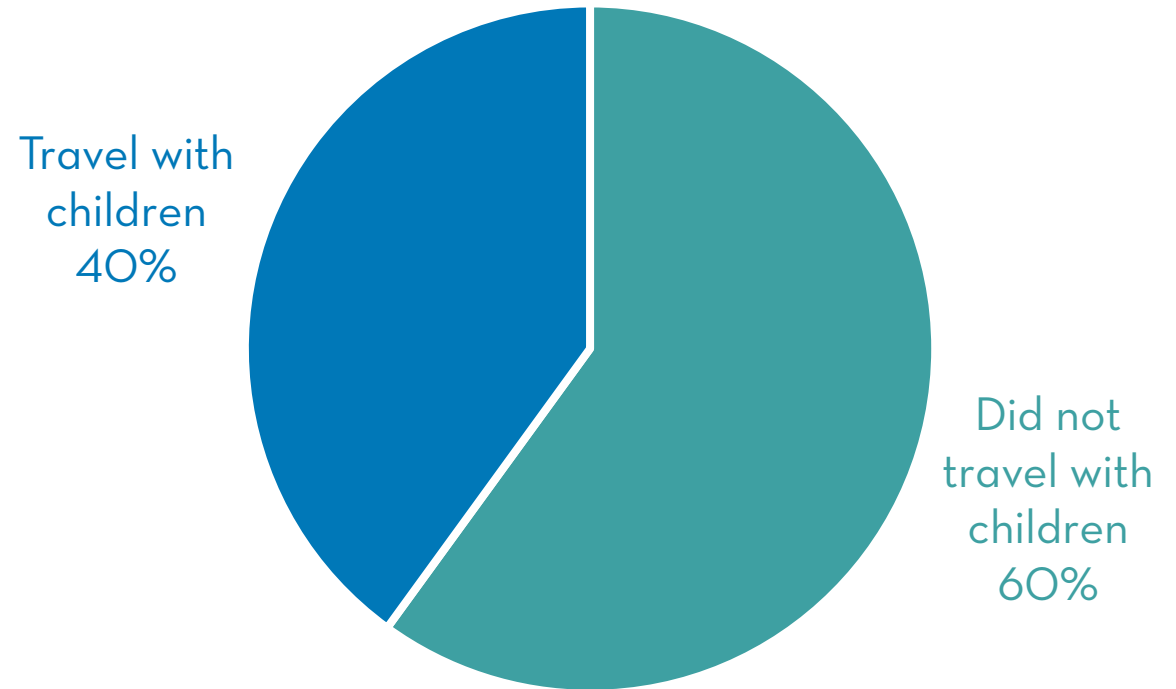
- » **Orlando-Daytona Beach-Melbourne, Tampa-St. Petersburg and Gainesville** were key origin markets this quarter
- » **Florida markets** dominated the top markets for Ocala/Marion County
- » Top Markets for first-time visitors included: **Orlando-Daytona Beach-Melbourne, Gainesville, Jacksonville, Tallahassee-Thomasville, and Tampa-St. Petersburg**

Market	Percent
Orlando-Daytona Beach-Melbourne	15%
Tampa-St. Petersburg	7%
Gainesville	7%
Jacksonville	6%
New York*	5%
West Palm Beach-Ft. Pierce	3%
Miami-Fort Lauderdale	3%
Atlanta	3%
Tallahassee-Thomasville	2%
Chicago	2%
Boston	2%
Washington, DC - Hagerstown	2%

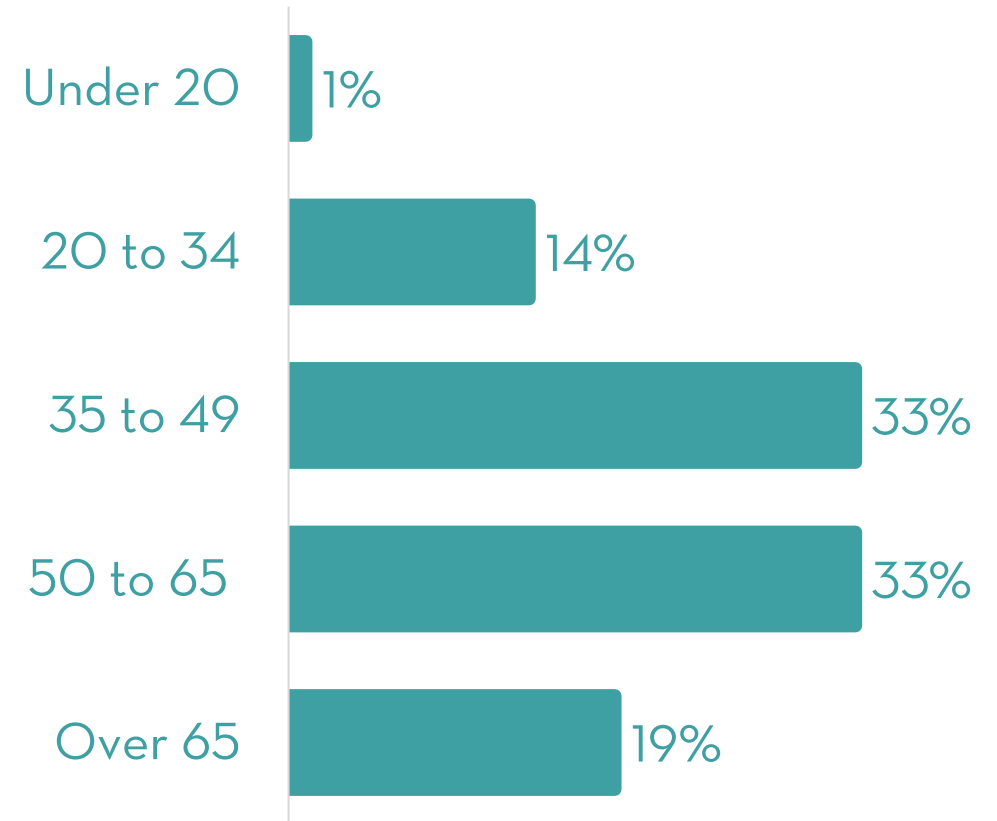
*New York City includes areas of New York, New Jersey and Connecticut

TRAVEL PARTIES

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

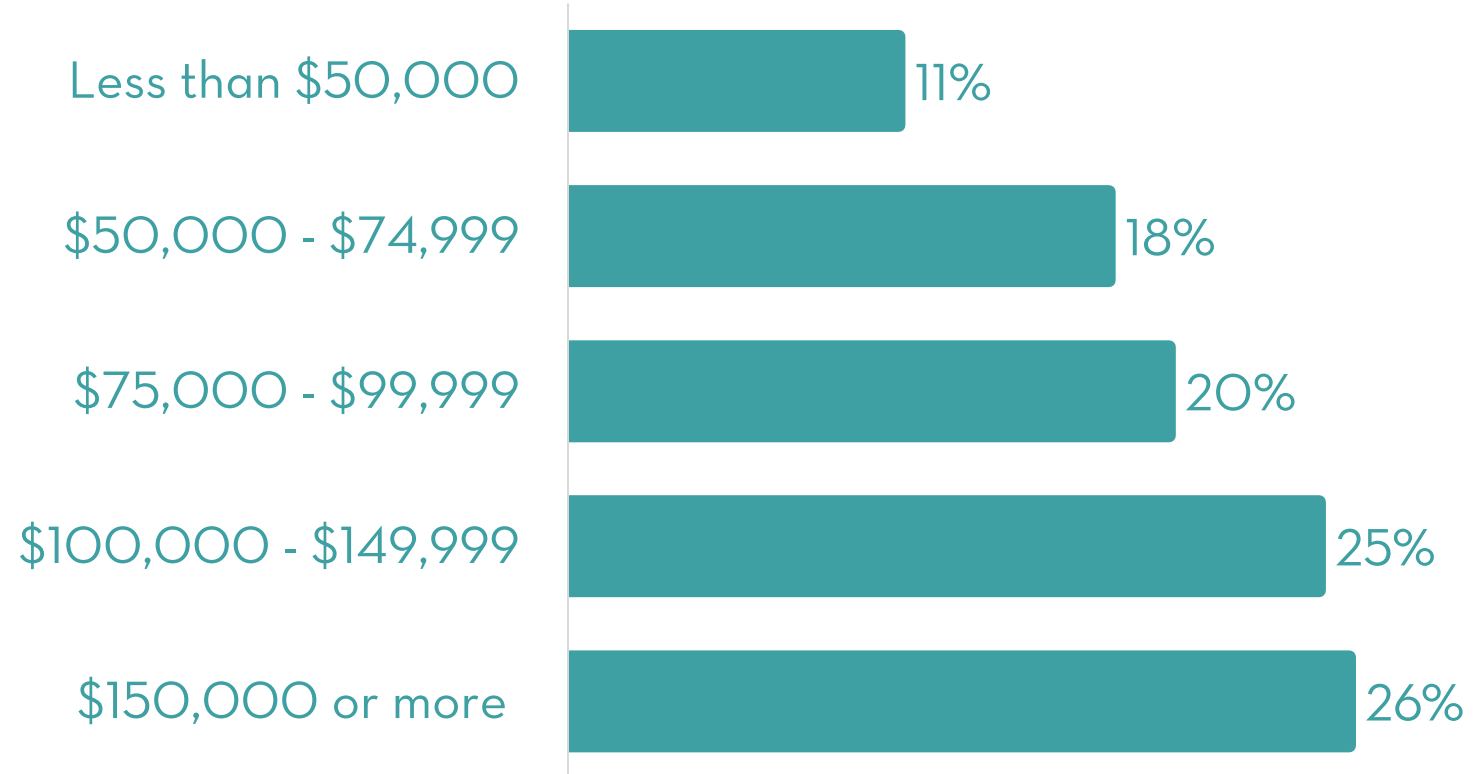


» The median age of visitors to the Ocala/Marion County area was **51**

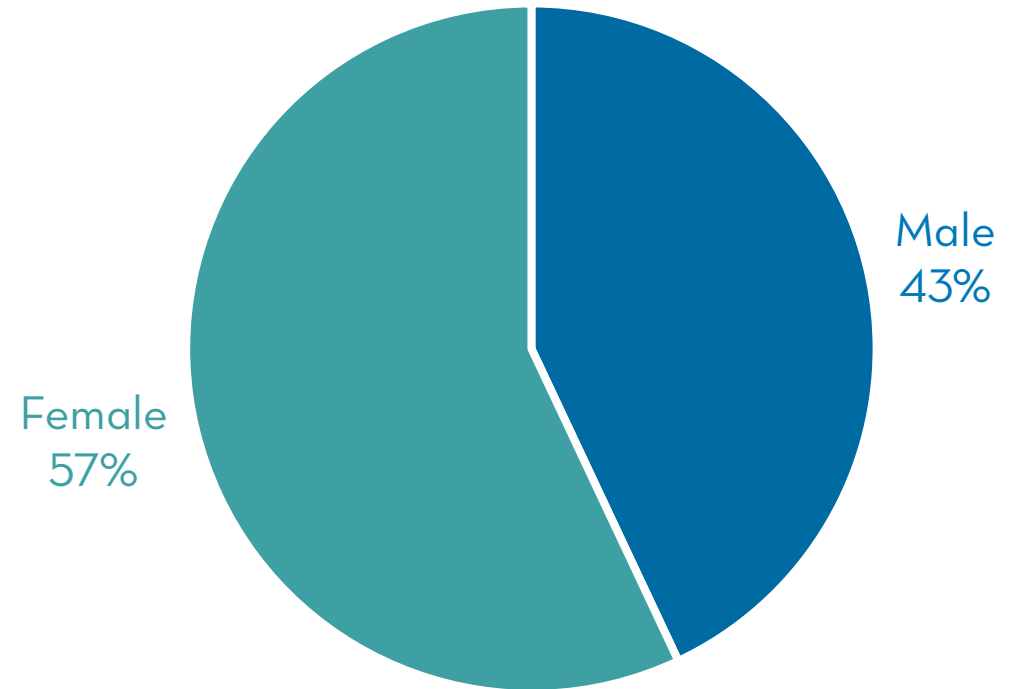


HOUSEHOLD INCOME

- » Visitors to the Ocala/Marion County area had a median household income of **\$102,000** per year
- » **Over half** of the visitors had household incomes over **\$100,000**

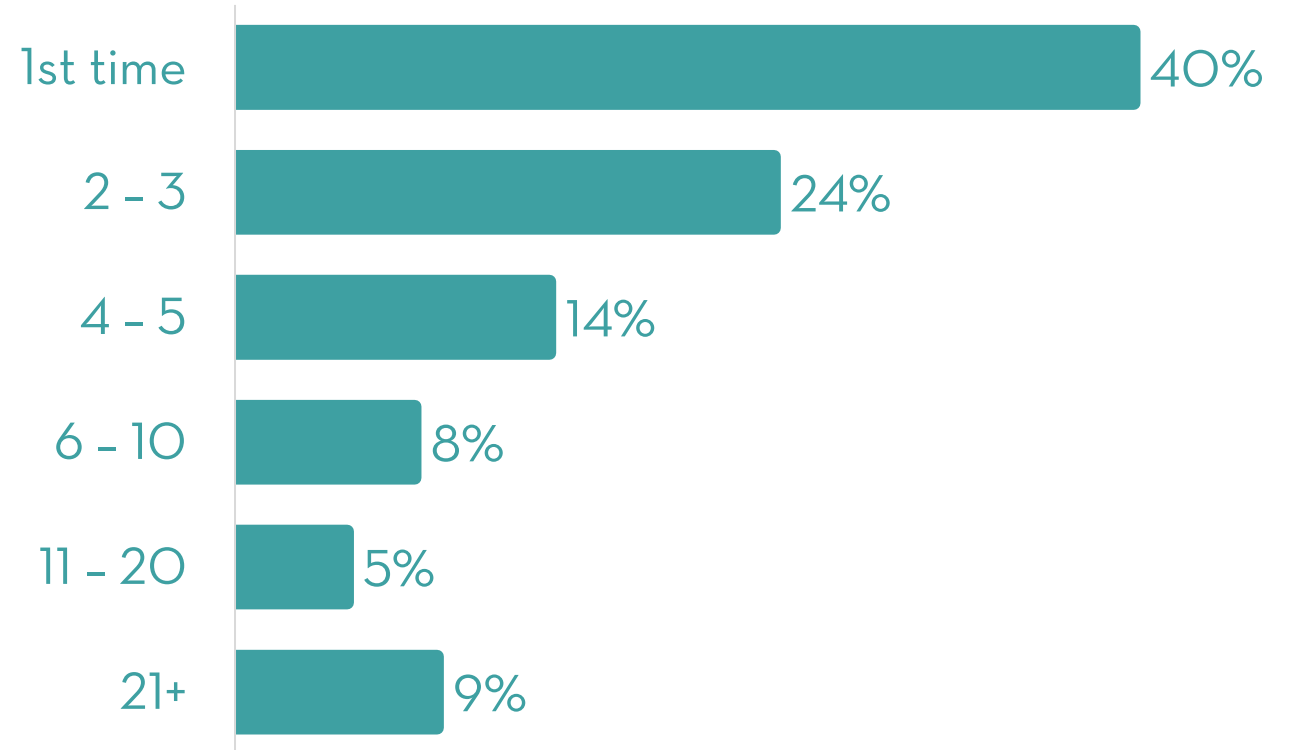


» **57%** of visitors interviewed were **female**



NEW & RETURNING VISITORS

- » **2 in 5** visitors said **this was their first time visiting** the Ocala/Marion County area
- » **1 in 6** visitors were loyalists, having visited over 10 times

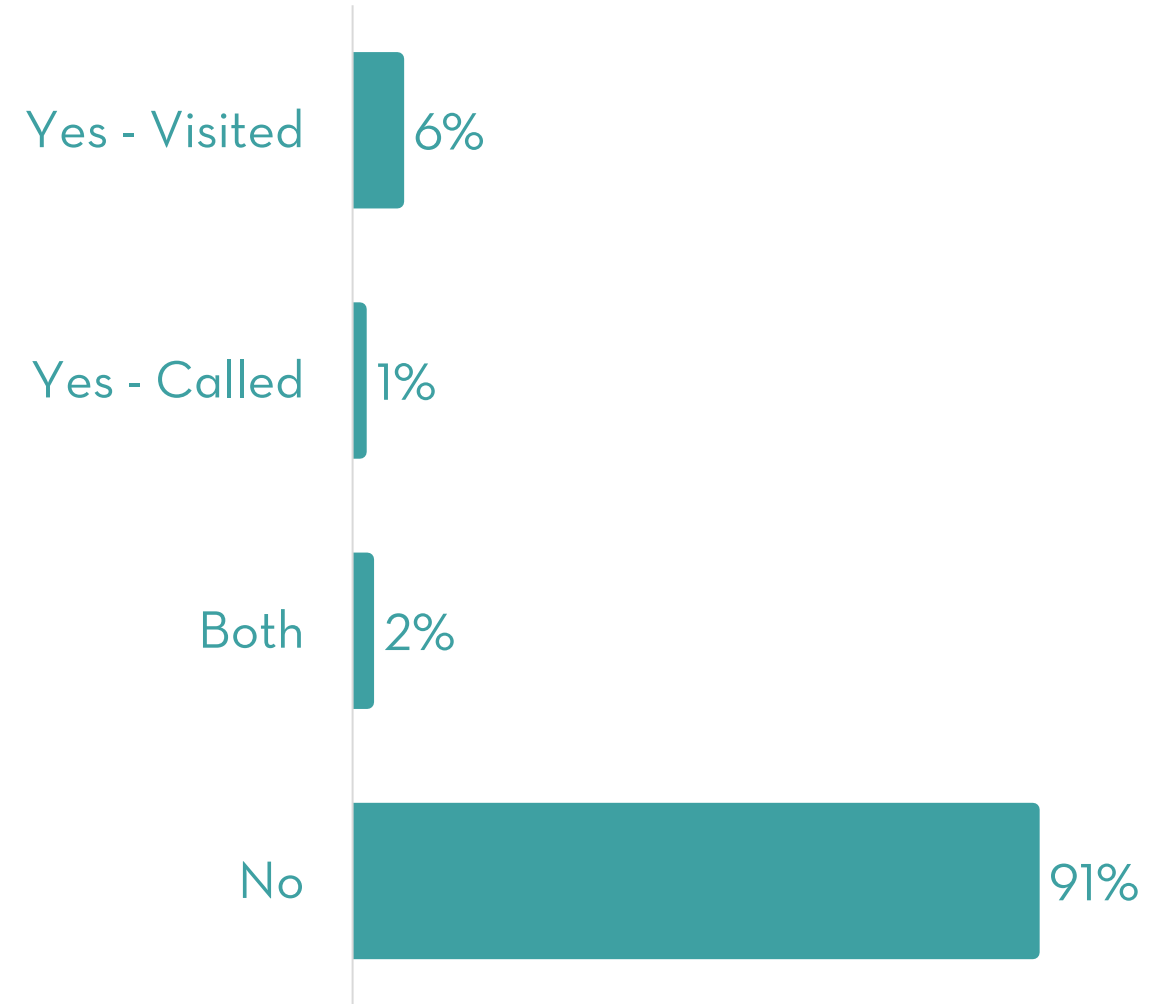


VISITOR JOURNEY: TRIP EXPERIENCE



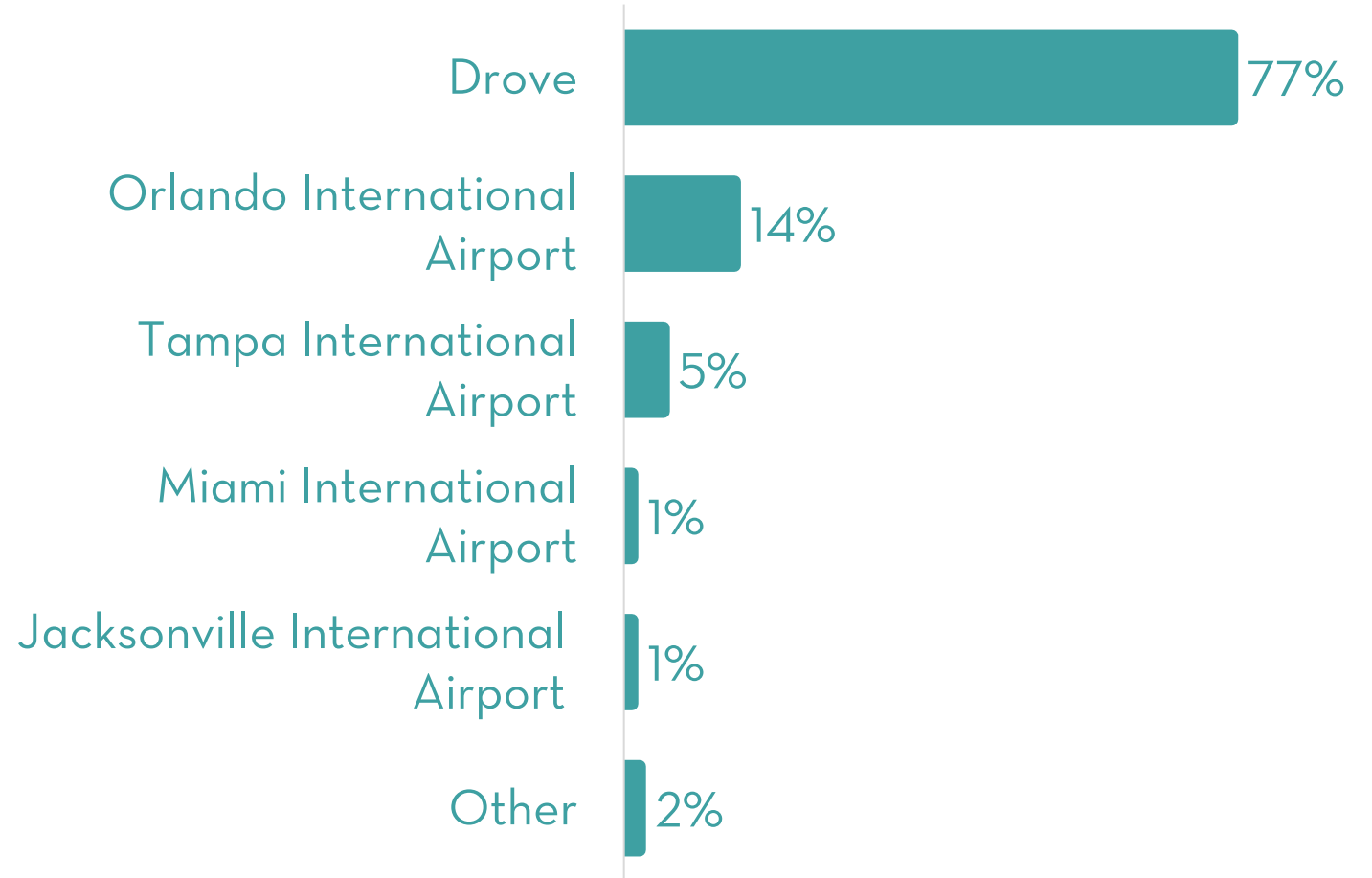
VISITOR CENTER

- » **8%** of visitors **stopped at the Visitor Center**
- » Usefulness Rating: **8.3 out of 10***



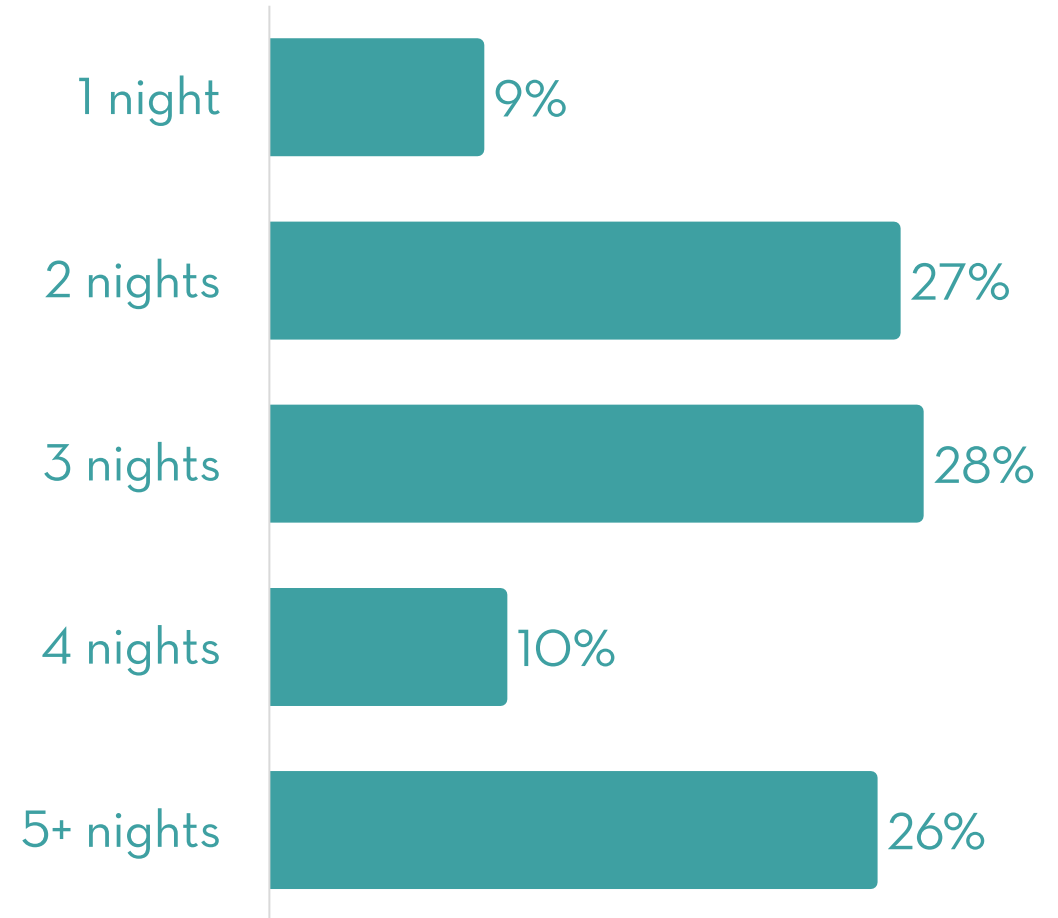
TRANSPORTATION

- » **77%** of visitors **drove** to the Ocala/Marion County area for their trip
- » **14%** of **all** visitors used the **Orlando International Airport**



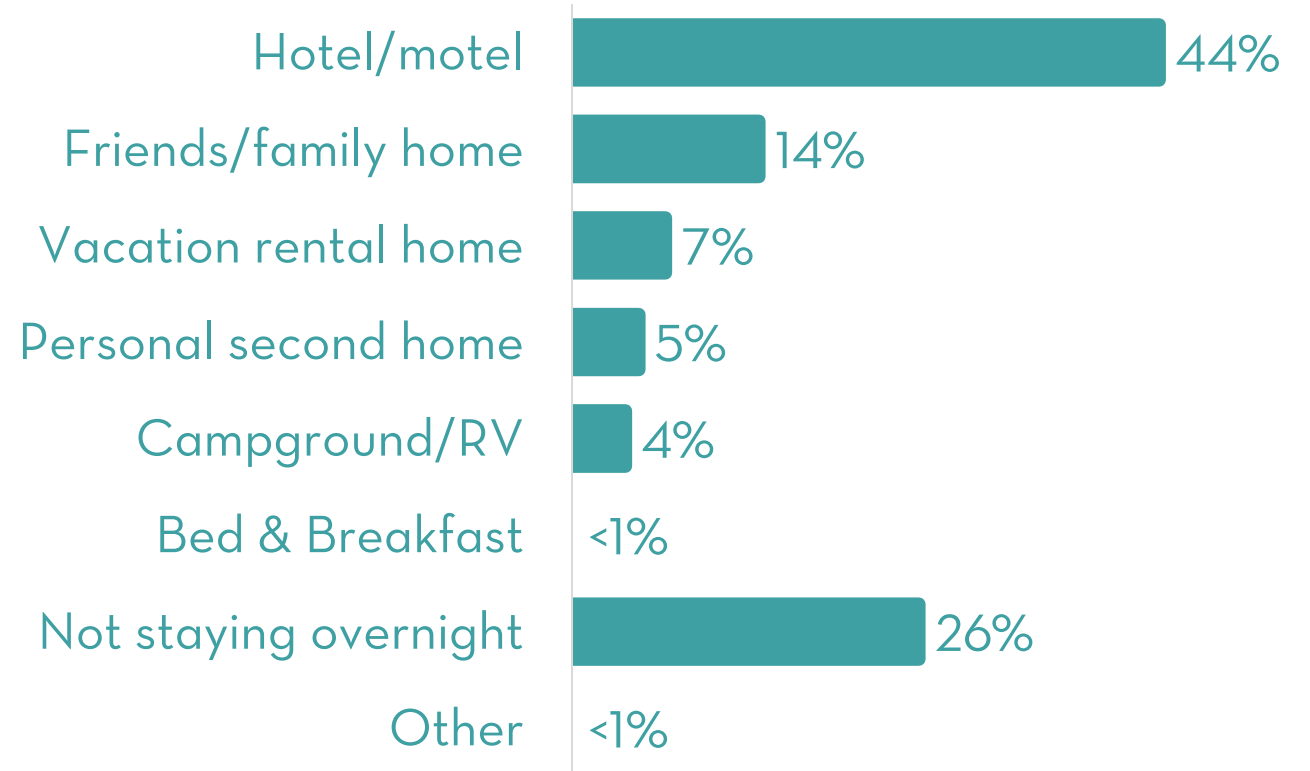
NIGHTS

- » Visitors stayed **4.8** nights in Ocala/Marion County*
- » Visitors staying in paid accommodations stayed **5.3** nights in the Ocala/Marion County area



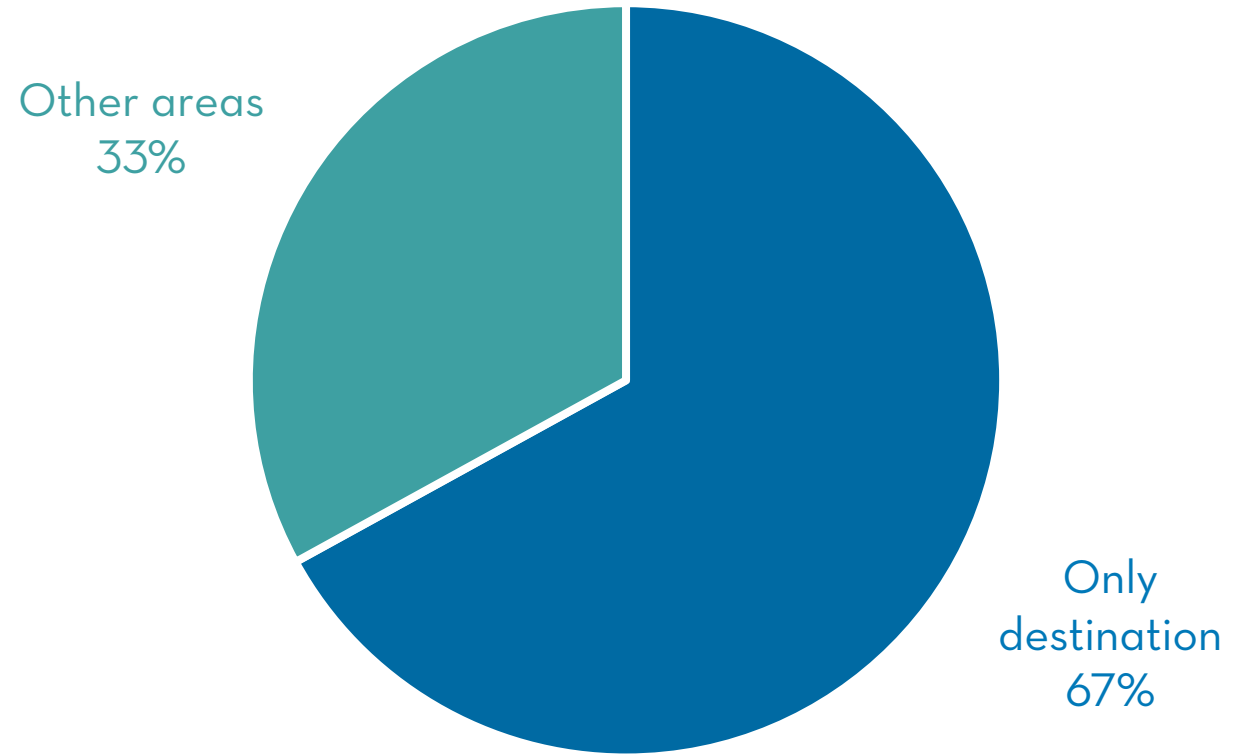
ACCOMMODATIONS

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



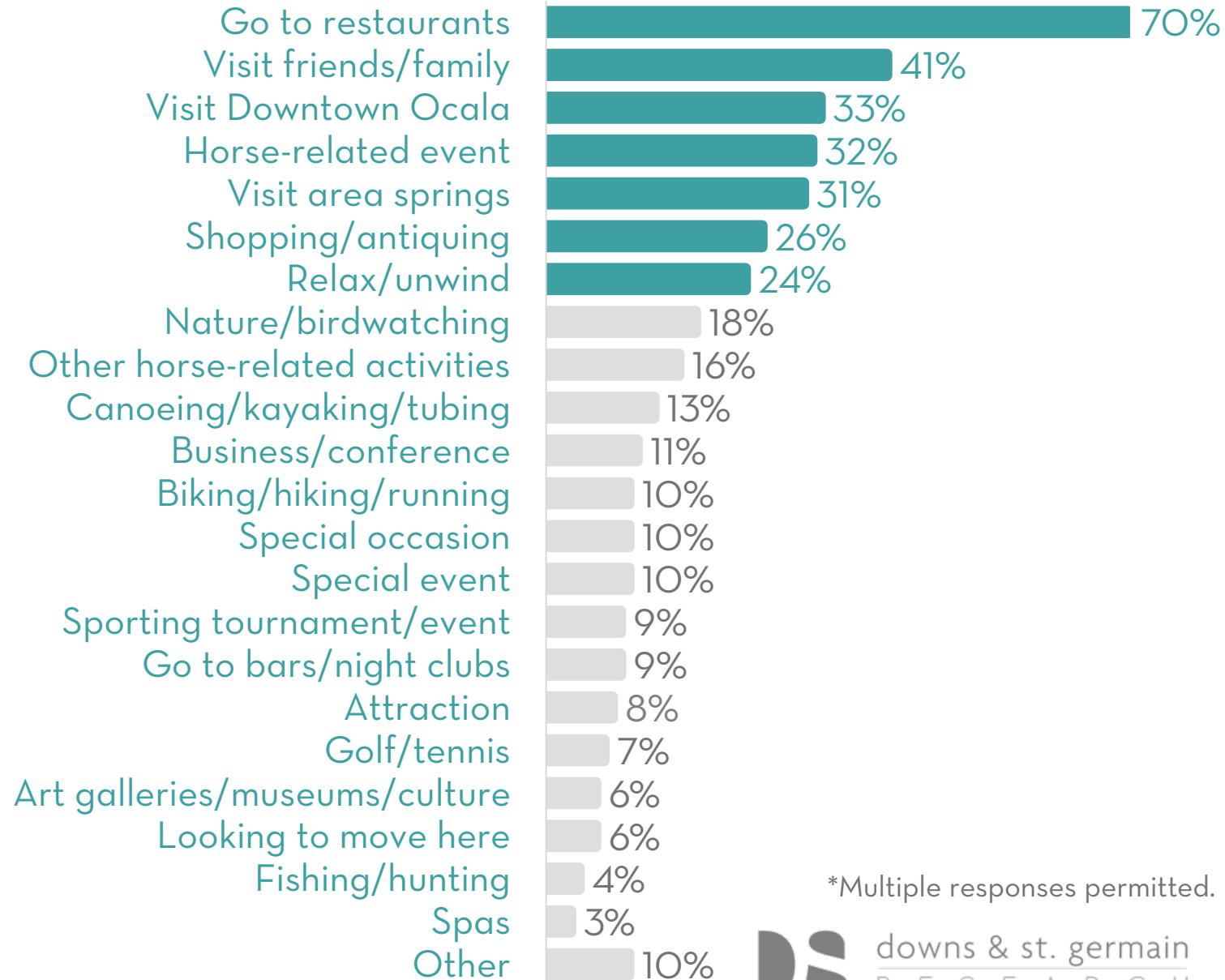
VISITING OTHER AREAS

- » **1 in 3** visitors were also visiting other destinations on their trip



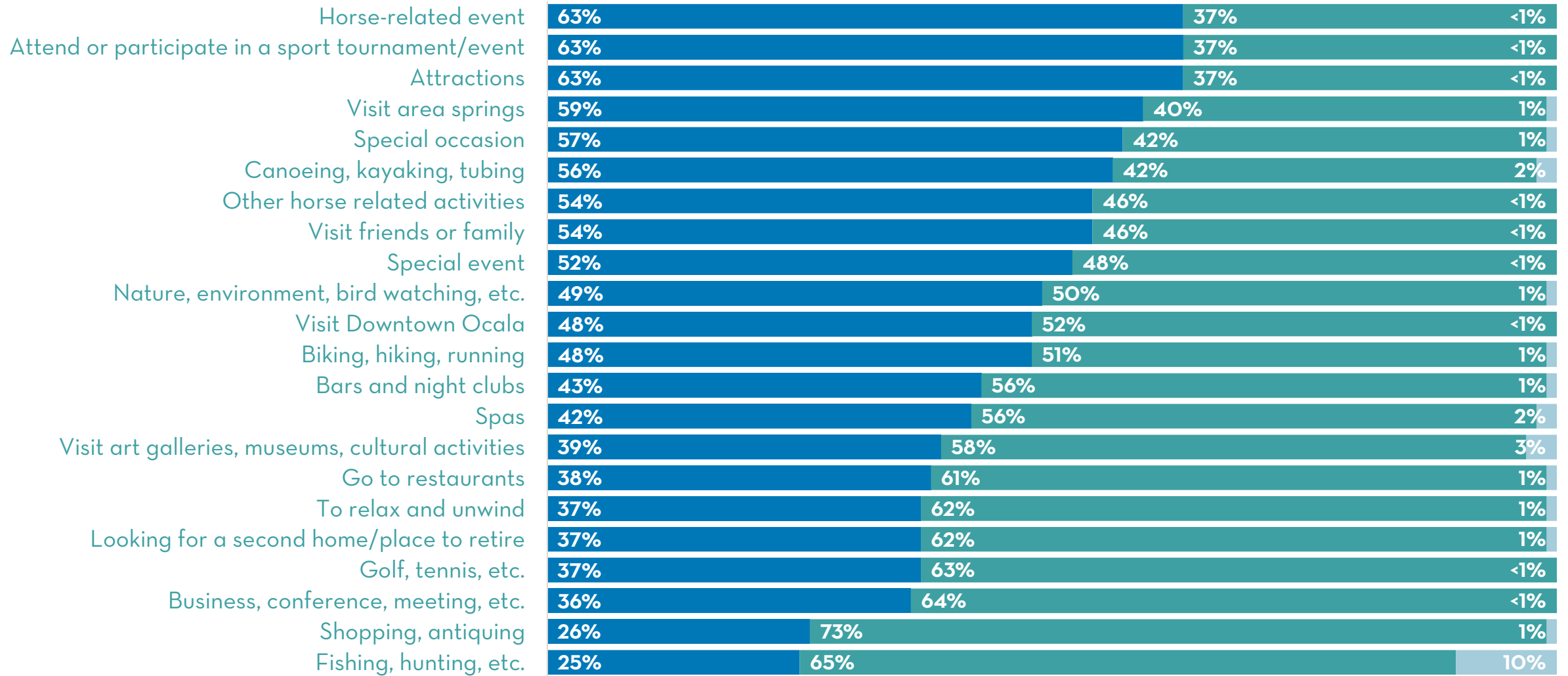
VISITOR ACTIVITIES*

- » **Going to restaurants** is the number one activity, as **7 in 10** visitors went out to eat
- » **Over 2 in 5** visitors visited **friends and family**
- » **1 in 3** visitors enjoyed **Downtown Ocala** during their visit
- » **Nearly 1 in 3** visitors enjoyed the **horse-related events and area springs** during their visit

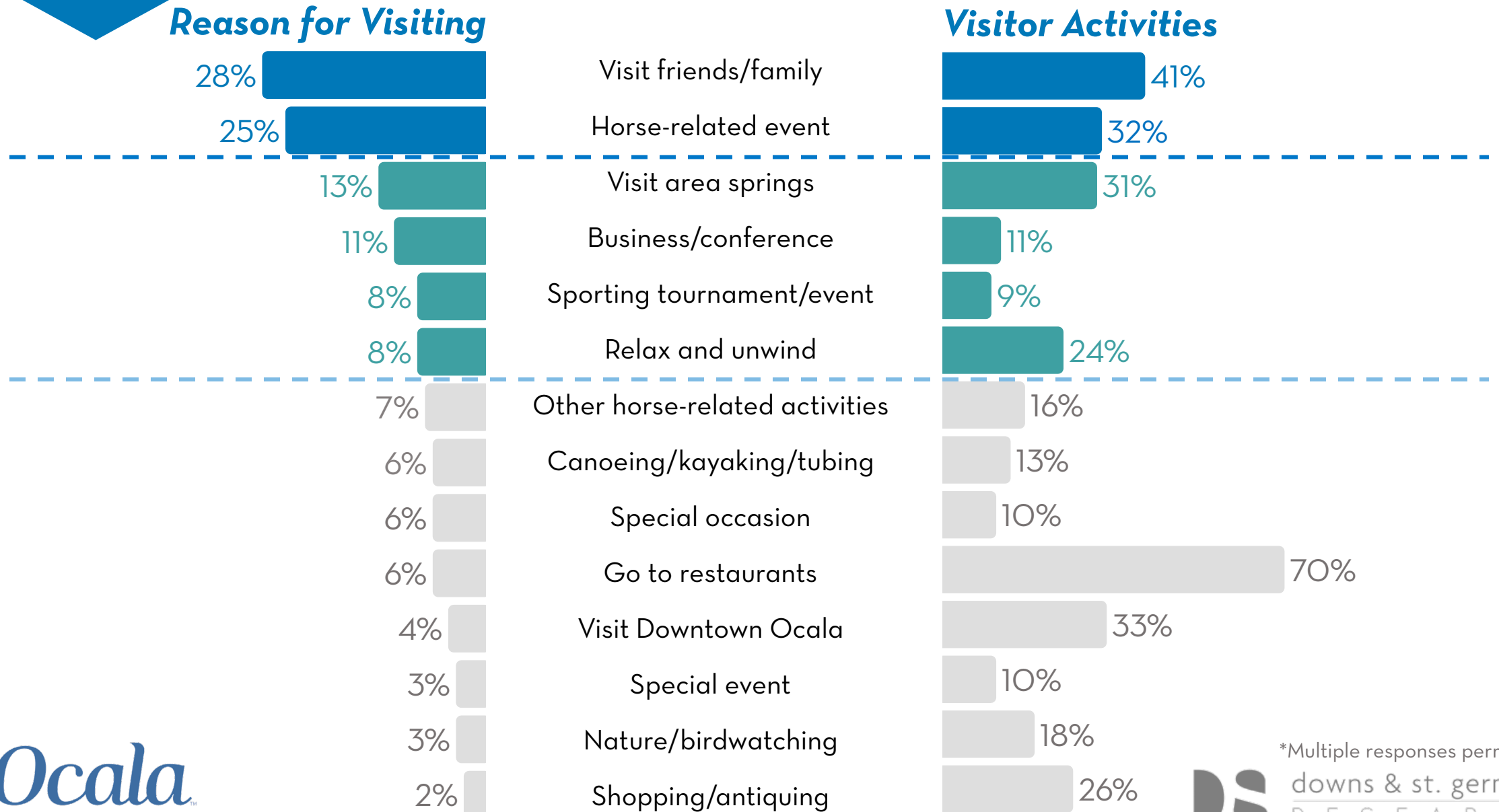


*Multiple responses permitted.

VISITOR ACTIVITY RATINGS



ACTIVITIES VS. REASON FOR VISIT*



TRAVEL PARTY SPENDING

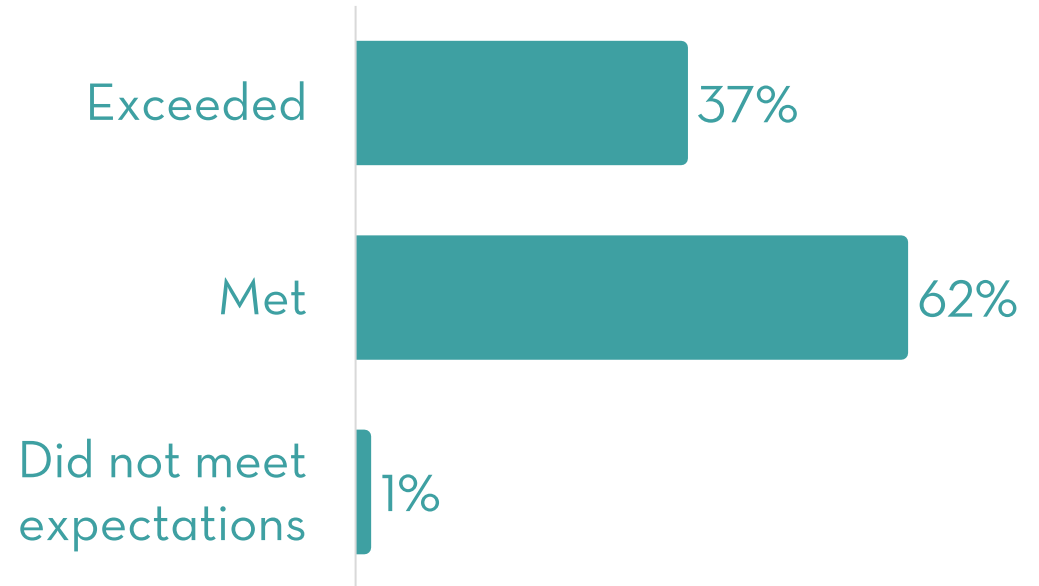
	Daily Spending: All Visitors	Total Spending: All Visitors
<i>Accommodations</i>	<i>\$80¹</i>	<i>\$384¹</i>
<i>Restaurants</i>	<i>\$86</i>	<i>\$413</i>
<i>Groceries</i>	<i>\$21</i>	<i>\$101</i>
<i>Shopping</i>	<i>\$53</i>	<i>\$254</i>
<i>Entertainment</i>	<i>\$44</i>	<i>\$211</i>
<i>Transportation</i>	<i>\$26</i>	<i>\$125</i>
<i>Other</i>	<i>\$25</i>	<i>\$120</i>
Total	\$335	\$1,608

VISITOR JOURNEY: POST-TRIP



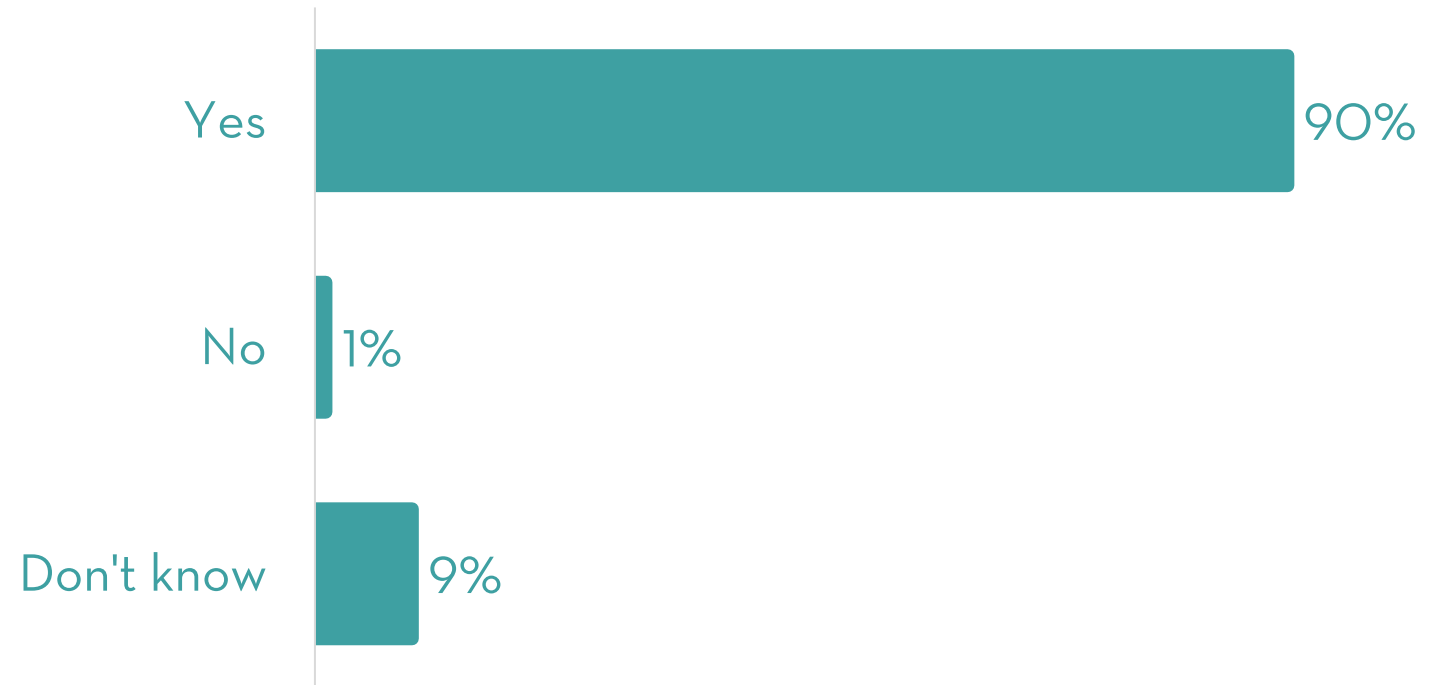
TRIP EXPERIENCE

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



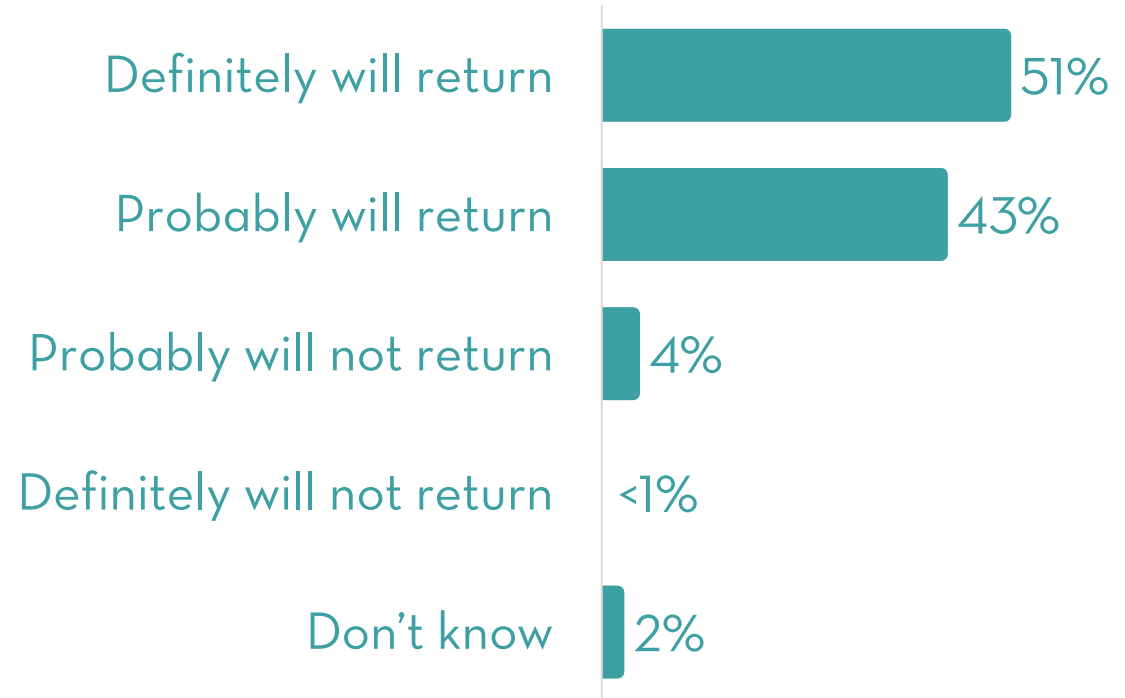
RECOMMENDATION

- » **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 **it's too soon to tell if they would come back** and **they prefer a variety in vacation spots**



2025 to 2024 COMPARISONS



PRE-VISIT

Visitor Metrics	Jan-Mar 2024	Jan-Mar 2025
<i>Ocala/Marion County was the only destination</i>	65%	67%
<i>Viewed Visitors Guide</i>	7%	15%
<i>Stopped at Visitors Center</i>	8%	8%
<i>Planned trip a month or less in advance</i>	52%	50%
<i>Average number of days trip was planned in advance of it being taken</i>	60	62
<i>Used OcalaMarion.com to plan their trip</i>	6%	4%
<i>Recalled Ocala/Marion County promotions</i>	26%	28%

PRE-VISIT

Reason for Visiting	Jan-Mar 2024	Jan-Mar 2025
<i>Visit friends/family</i>	30%	28%
<i>Horse-related event</i>	25%	25%
<i>Visit area springs</i>	10%	13%
<i>Business meeting/conference</i>	6%	11%
<i>Sporting tournament/event</i>	7%	8%
<i>Relax/unwind</i>	13%	8%
<i>Other horse-related activities</i>	6%	7%
<i>Canoeing/kayaking/tubing</i>	4%	6%
<i>Go to restaurants</i>	8%	6%
<i>Special occasion</i>	2%	6%
<i>Visit Downtown Ocala</i>	8%	4%

Reason for Visiting	Jan-Mar 2024	Jan-Mar 2025
<i>Nature/environment</i>	7%	3%
<i>Special event</i>	3%	3%
<i>Attraction</i>	6%	3%
<i>Shopping</i>	4%	2%
<i>Looking for a second home/place to retire</i>	3%	2%
<i>Biking/hiking/running</i>	2%	1%
<i>Art galleries/museums/culture</i>	1%	1%
<i>Go to bars/nightclubs</i>	1%	1%
<i>Fishing/hunting</i>	1%	1%
<i>Golf/tennis</i>	2%	1%
<i>Spas</i>	<1%	<1%
<i>Other</i>	8%	10%

TRAVEL PARTY PROFILE

Top Origin Markets	Jan-Mar 2024	Jan-Mar 2025
<i>Orlando - Daytona Beach - Melbourne</i>	14%	15%
<i>Tampa - St. Petersburg</i>	7%	7%
<i>Gainesville</i>	4%	7%
<i>Jacksonville</i>	5%	6%
<i>New York City*</i>	6%	5%
<i>West Palm Beach - Ft. Pierce</i>	2%	3%
<i>Miami - Ft. Lauderdale</i>	3%	3%
<i>Atlanta</i>	3%	3%

Top Origin States	Jan-Mar 2024	Jan-Mar 2025
<i>Florida</i>	39%	47%
<i>New York</i>	5%	5%
<i>Georgia</i>	3%	4%
<i>Michigan</i>	4%	3%
<i>North Carolina</i>	3%	3%

Top Origin Regions	Jan-Mar 2024	Jan-Mar 2025
<i>Southeast (includes Florida)</i>	56%	62%
<i>Northeast</i>	18%	16%
<i>Midwest</i>	17%	13%
<i>West</i>	4%	3%
<i>International</i>	5%	6%

TRIP EXPERIENCE

Visitor Metrics	Jan-Mar 2024	Jan-Mar 2025
<i>Travel party</i>	3.1	2.9
<i>Children <18</i>	42%	40%
<i>Median age</i>	51	51
<i>Estimated median household income</i>	\$89,300	\$102,000
<i>1st time visitor</i>	30%	40%
<i>10+ visits to Ocala/Marion County</i>	20%	14%

Visitor Metrics	Jan-Mar 2024	Jan-Mar 2025
<i>Drove</i>	79%	77%
<i>Nights spent</i>	5.4	4.8
<i>Direct expenditures (entire trip)</i>	\$1,814	\$1,608

TRIP EXPERIENCE

Visitor Activities

Jan-Mar 2024

Jan-Mar 2025

<i>Go to restaurants</i>	64%	70%
<i>Visit friends or family</i>	46%	41%
<i>Visit Downtown Ocala</i>	29%	33%
<i>Horse-related event</i>	40%	32%
<i>Visit area springs</i>	27%	31%
<i>Shopping</i>	24%	26%
<i>Relax and unwind</i>	32%	24%
<i>Nature/environment</i>	23%	18%
<i>Other horse-related activities</i>	12%	16%
<i>Canoeing/kayaking/tubing</i>	11%	13%
<i>Business meeting/conference</i>	9%	11%
<i>Biking/hiking/running</i>	8%	10%

Visitor Activities

Jan-Mar 2024

Jan-Mar 2025

<i>Special occasion</i>	6%	10%
<i>Special event</i>	7%	10%
<i>Sporting tournament/event</i>	9%	9%
<i>Go to bar/night clubs</i>	13%	9%
<i>Attraction</i>	11%	8%
<i>Golf/tennis</i>	9%	7%
<i>Art galleries/museums/cultural events</i>	4%	6%
<i>Looking for a second home/place to retire</i>	8%	6%
<i>Fishing/hunting</i>	7%	4%
<i>Spas</i>	3%	3%
<i>Other</i>	3%	10%

POST TRIP EVALUATION

Satisfaction Metrics	Jan-Mar 2024	Jan-Mar 2025
<i>Visit Met + Exceeded expectations</i>	99%	99%
<i>Will return to Ocala/Marion County</i>	97%	94%
<i>Will recommend Ocala/Marion County</i>	92%	90%

Ocala/MARION COUNTY VCB

Economic Impact Study & Visitor Tracking Report Jan – Mar 2025

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