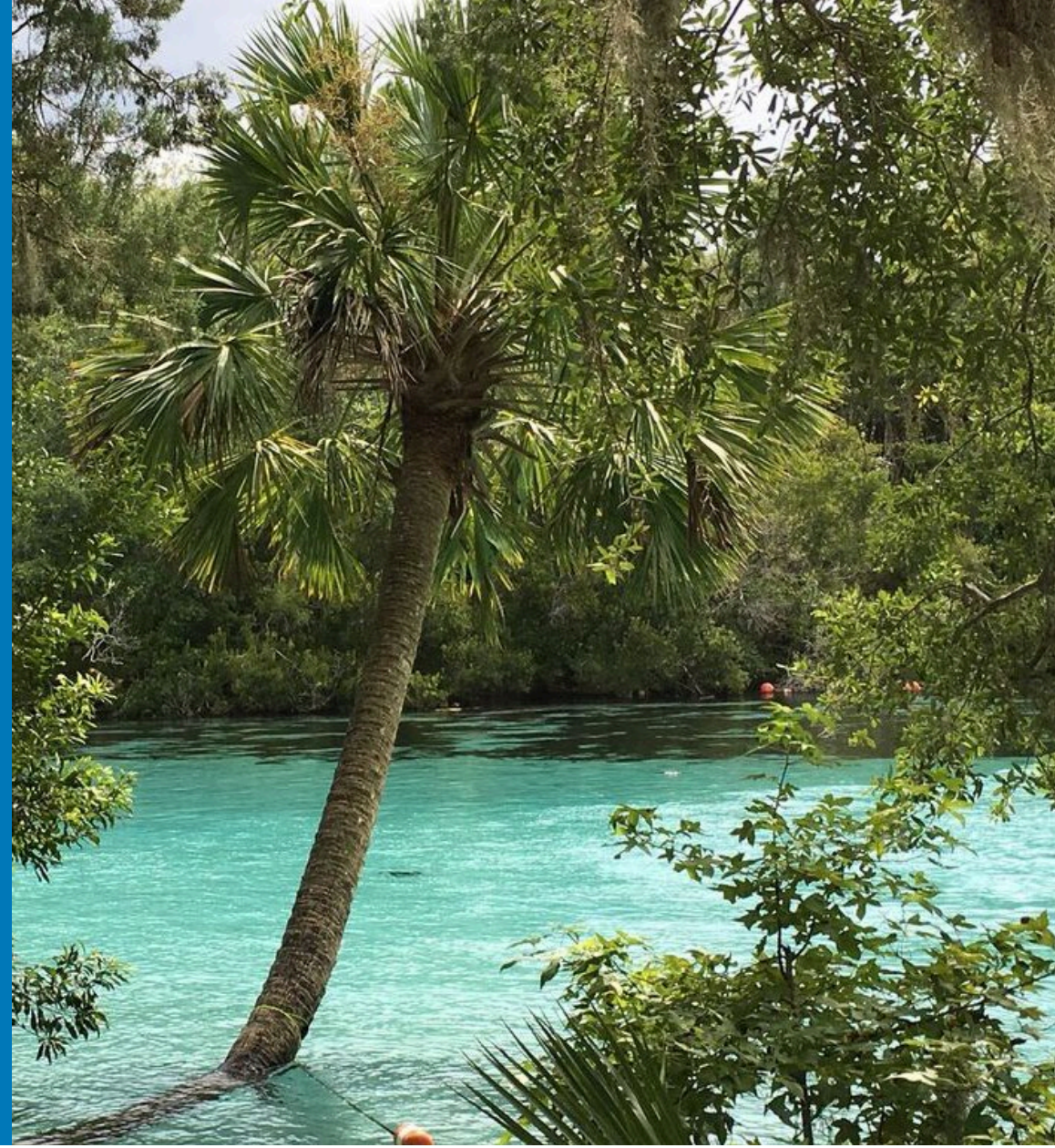


# Ocala/MARION COUNTY VCB

Economic Impact Study &  
Visitor Tracking Report  
July-Sept 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



## Visitor Tracking Study

- » Interviews were completed in person and online with 550 visitors at local hotels, attractions, and events between July 1, 2024 and September 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

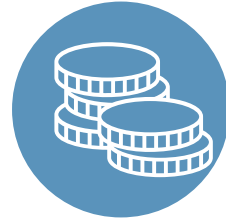


# VISITOR JOURNEY: ECONOMIC IMPACT





# JULY - SEPT 2024 TOURISM SNAPSHOT



**\$1,214,133**

TDT  
**COLLECTIONS**

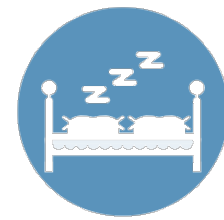
↑ 2.3%



**263,800**

ROOM  
**NIGHTS**

↑ 6.2%



**54.4%**

OCCUPANCY  
**RATE**

↓ 3.3%



**\$111.10**

AVERAGE DAILY  
**RATE**

↓ 1.8%



**\$60.47**

REVENUE PER AVAILABLE  
**ROOM**

↓ 5.0%

2024 vs. 2023

- » An increase in units available along with an increase in paid visitors led to a quarter with increased room nights and TDT collections while having an overall lower visitor metric. Significant decreases in those staying in unpaid accommodations and day trippers in July-Sept 2024 helped add to this phenomenon.
- » Spending per travel party saw a decrease that falls in line with national trends of decreasing spending and length of stay due to increased economic caution amongst other factors.
- » Length of stay in destination decreased from 4.0 nights on average to 3.7 nights on average compared to July-Sept 2023 and travel party size decreased from 3.2 people on average to 2.9 people on average compared to July-Sept 2023.
- » The percentage of visitors only visiting Ocala/Marion County increased compared to July-Sept 2023 (+7% points) and The percentage of visitors visiting for the first time increased compared to July-Sept 2023 (+8% points).

# VISITOR & LODGING METRICS

Visitor Statistics <sup>1</sup>	July - Sept 2023	July - Sept 2024	Percent Change
Visitors	361,100	348,300	-3.5%
Direct Expenditures <sup>2</sup>	\$169,830,800	\$153,096,900	-9.9%
Total Economic Impact	\$263,237,700 <sup>3</sup>	\$230,695,800 <sup>3</sup>	- 12.4%
Lodging Statistics <sup>4</sup>	July - Sept 2023	July - Sept 2024	Percent Change
Occupancy	56.3%	54.4%	- 3.3%
Room Rates	\$113.10	\$111.10	- 1.8%
RevPAR	\$63.68	\$60.47	- 5.0%
Room Nights	248,300	263,800	+ 6.2%
TDT Collections	\$1,186,980	\$1,214,133	+ 2.3%

<sup>1</sup> Spending is lower compared to last year due to a nationwide trend of travelers taking shorter trips and spending less money on their trips. Also, significantly fewer visitors staying with friends and family or in second homes.

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

<sup>3</sup> Multiplier decreased from 1.55 in July-Sept 2023 to 1.51 in July-Sept 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 half** of visitors planned their trips to the Ocala/Marion County area **a month or less in advance**
- » Visitors planned their trip **on average 53 days in advance of their visit**



# TOP TRIP PLANNING SOURCES\*



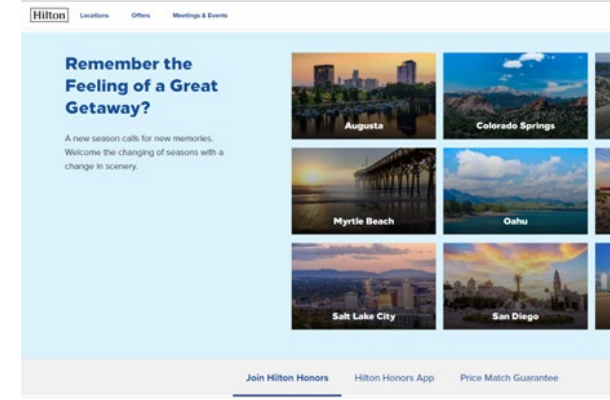
**56%** Talk to friends and family



**52%** Search sites



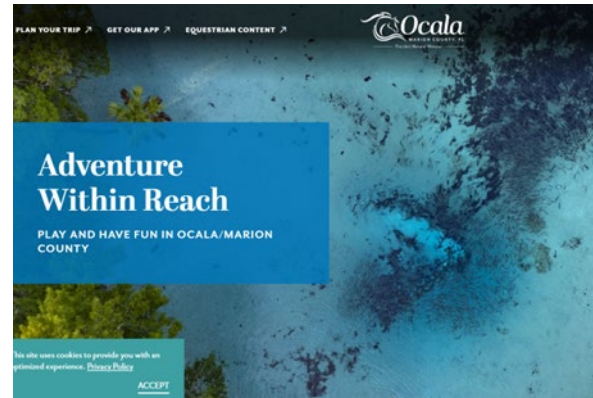
**15%** Destination social media



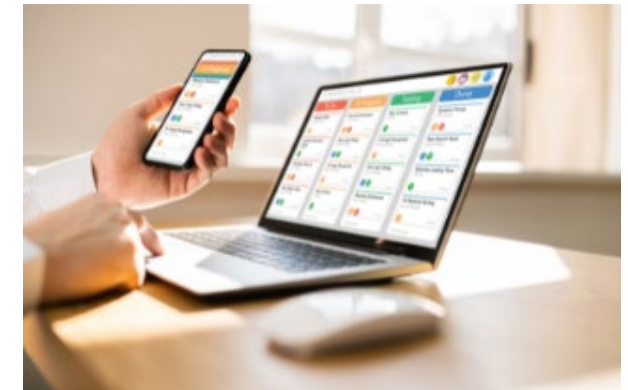
**13%** Hotel/resort website/app



**12%** Personal social media



**7%** OcalaMarion.com



**7%** Trip planning website/app



# TOP REASONS FOR VISITING\*



**24%** Visit friends/relatives



**16%** Attend horse shows, sales, events



**15%** Sporting tournament/event



**14%** Visit area springs



**12%** Relax/unwind



**9%** Business conference



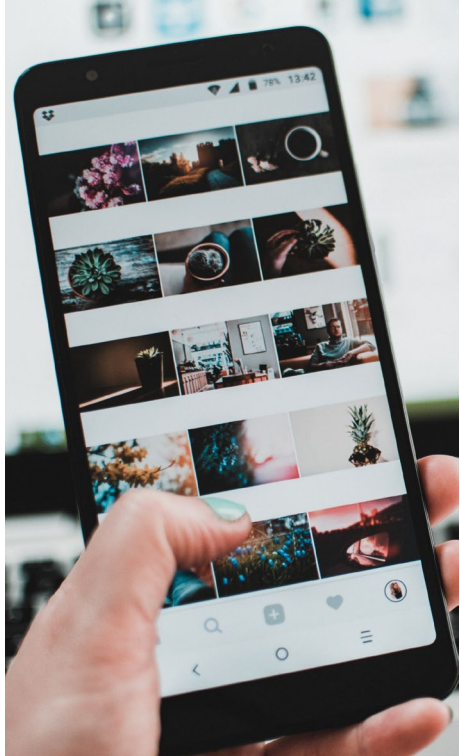
# PRE-TRIP RECALL OF ADVERTISING

- » **23%** of visitors recalled advertising about the Ocala/Marion County area
- » **3 in 4** visitors who recalled advertising were influenced by this information to visit the area (represents **17% of all visitors**)



# SOURCES OF ADVERTISING RECALL\*

Base: **23%** of visitors who recalled advertising



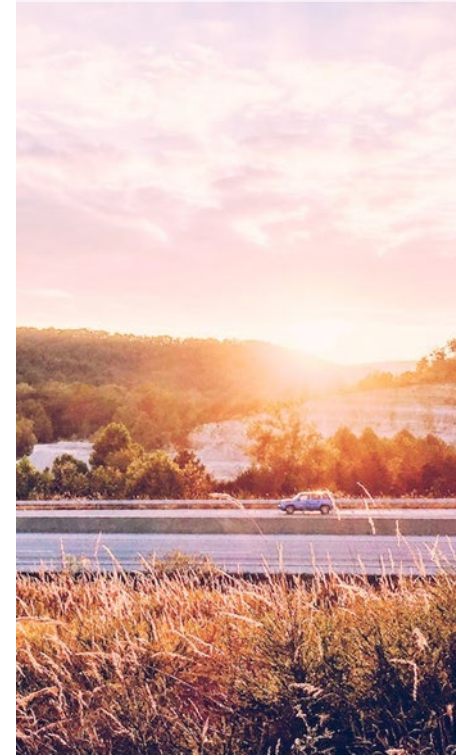
**31%** Social media



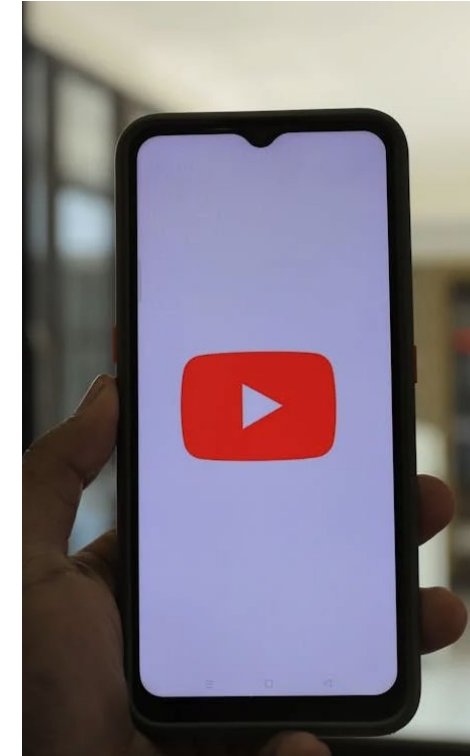
**29%** Online advertisement



**17%** Television



**11%** Billboard



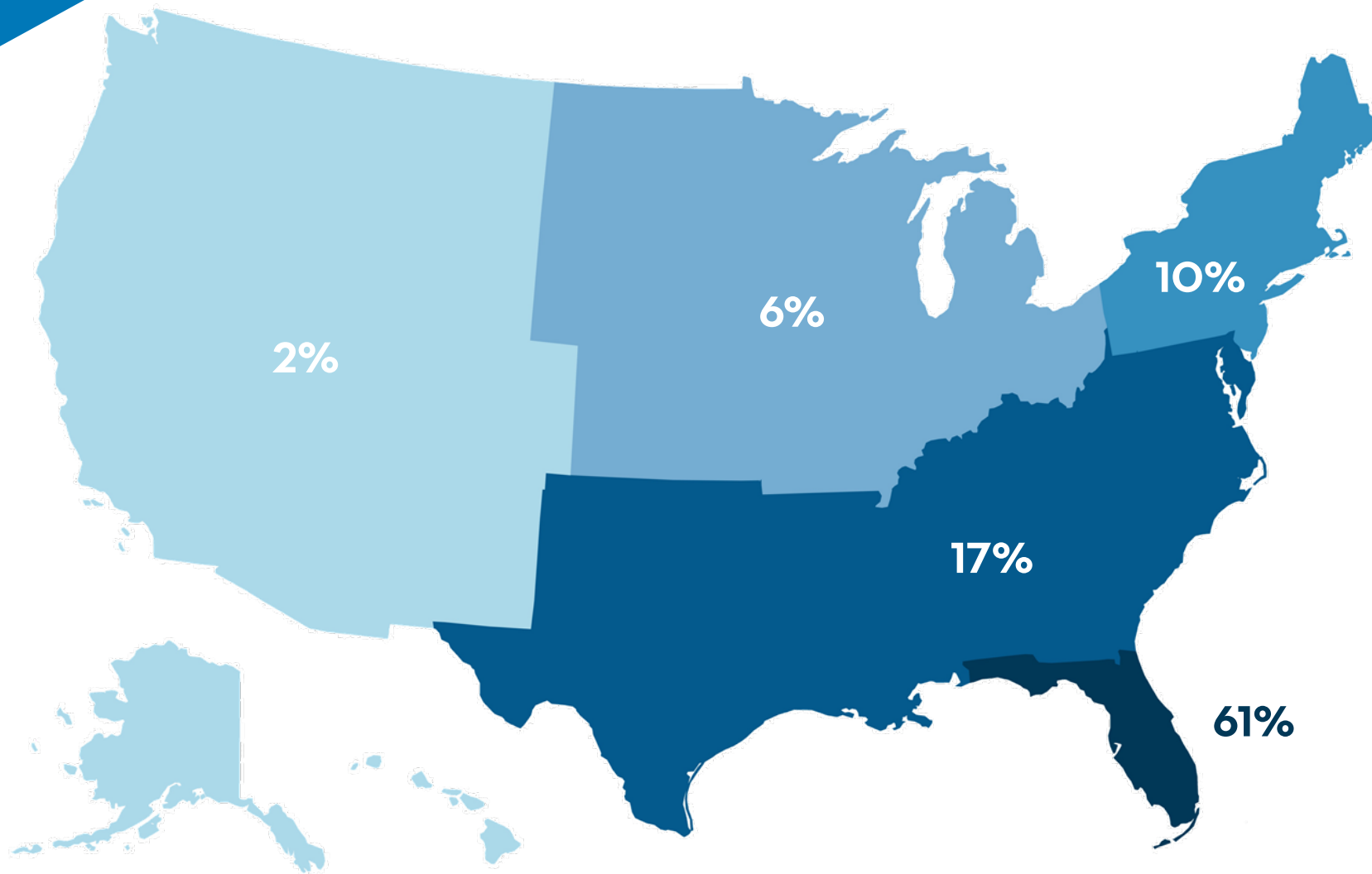
**10%** Video streaming service

# VISITOR JOURNEY: TRAVEL PARTY PROFILE



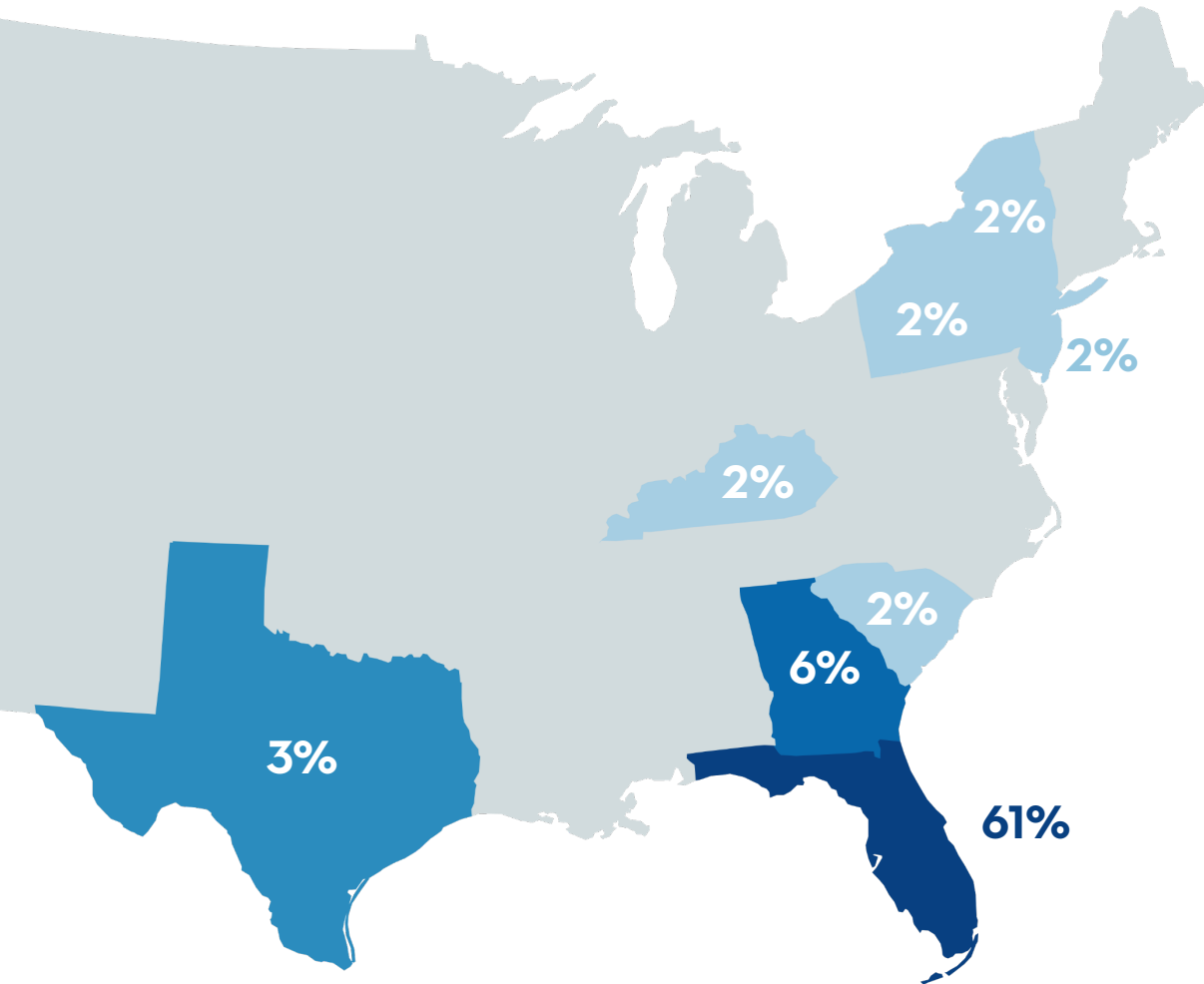


# REGIONS OF ORIGIN

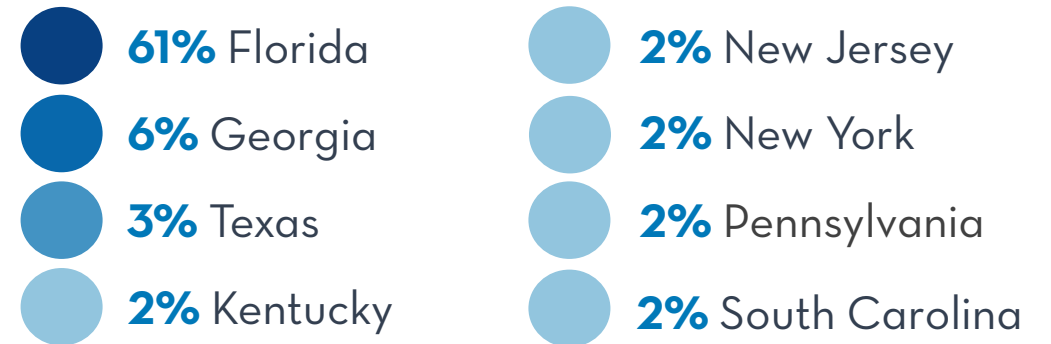


**4%** of visitors traveled to the Ocala/Marion County area from outside of the U.S.

# TOP STATES OF ORIGIN



**4 in 5** visitors traveled to Ocala/Marion County from 8 states:



# TOP ORIGIN MARKETS



**16%** Orlando - Daytona Beach - Melbourne



**12%** Tampa - St. Petersburg



**10%** Jacksonville



**6%** Gainesville



**5%** West Palm Beach - Ft. Pierce



**4%** Atlanta



**4%** Miami - Fort Lauderdale



# TRAVEL PARTIES

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



» **46%** traveled with at least one person under the age of 18



# VISITOR PROFILE

- » The typical Ocala/Marion County area visitor:
  - » Is **49** years old
  - » Has a household income of **\$82,500** per year





# NEW & RETURNING VISITORS

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





# VISITOR JOURNEY: TRIP EXPERIENCE



# TRANSPORTATION

- » **84%** of visitors **drove** to the Ocala/Marion County area
- » **10%** of visitors flew via the **Orlando International Airport**



# VISITOR BEHAVIOR

- » Typical visitors spent **3.7** nights in Ocala/Marion County area\*
- » **7 in 10** visitors were only visiting Ocala/Marion County during their trip

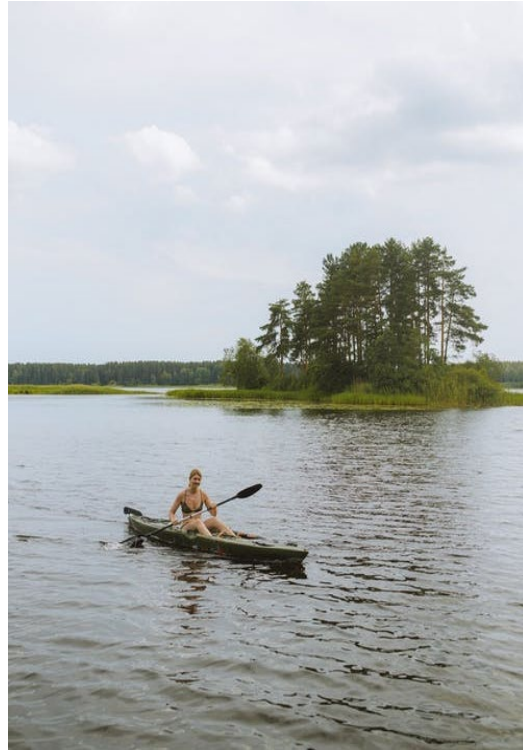




# TOP ACCOMMODATIONS



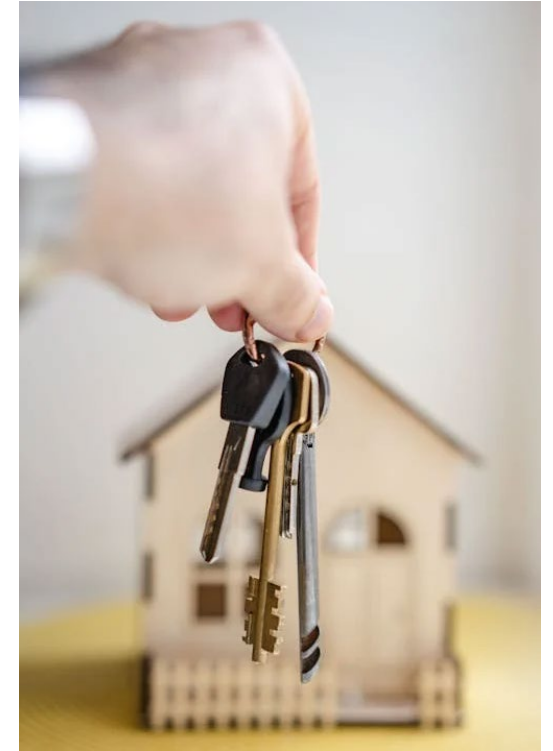
**46%** Hotel/motel/resort



**27%** Day tripper



**15%** Friends' or relatives' home



**4%** Vacation rental home\*



# TOP ACTIVITIES DURING VISIT\*



**54%** Dining out



**39%** Visit family/friends



**34%** Visit Downtown Ocala



**31%** Visit area springs



**27%** Relax & unwind



**25%** Attend horse shows, sales, events



**19%** Shopping



**17%** Sporting event

# ACTIVITIES VS. REASON FOR VISIT\*

## Reason for Visiting

24%



16%



15%



14%



12%



9%



7%



5%



5%



5%



4%



3%



3%



3%



Visit friends/relatives

Horse-related event

Sporting tournament/event

Visit area springs

Relax and unwind

Business/conference

Canoeing/kayaking/tubing

Go to restaurants

Visit Downtown Ocala

Other horse-related events

Special occasion

Special event

Nature/birdwatching

Shopping/antiquing

## Visitor Activities

39%



25%



17%



31%



27%



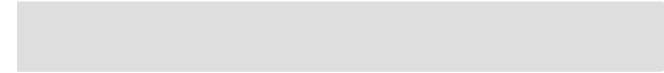
12%



15%



54%



34%



10%



7%



6%



16%

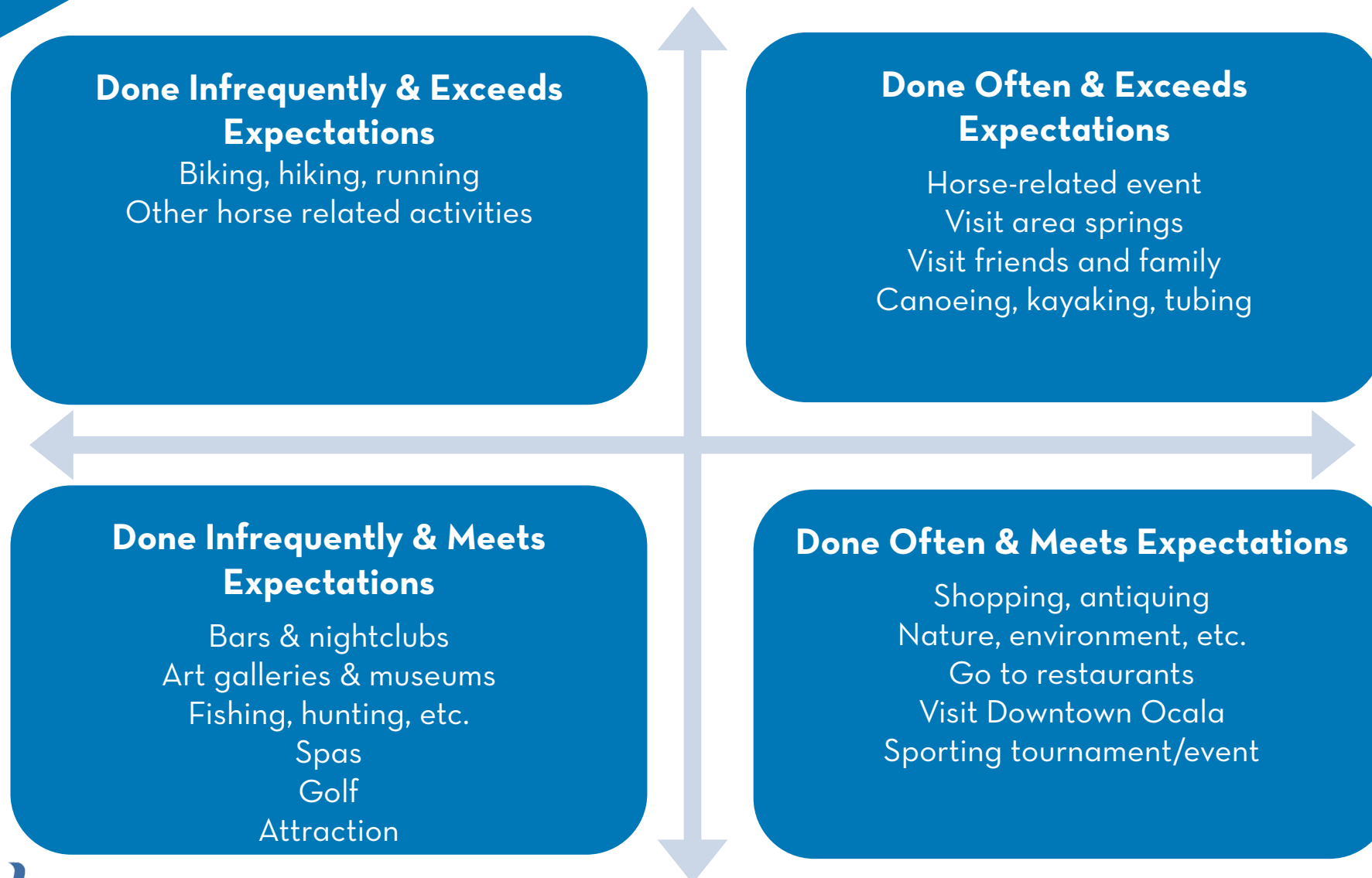


19%





# QUADRANT ANALYSIS



# TRAVEL PARTY SPENDING

» Travel parties spent **\$319** per day and **\$1,148** during their trip



# VISITOR JOURNEY: POST-TRIP





# VISITOR SATISFACTION

- » **99%** of visitors said their visit met or exceeded expectations (**48%** exceeded expectations)
- » **94%** will recommend Ocala/Marion County to a friend
- » **97%** will return to Ocala/Marion County (**59%** will definitely return)



# AREA DESCRIPTIONS



*“Ocala is a neat place. We used to live here, and it's grown a lot since then; definitely for the better.”*



*“We were unable to book room in Gainesville for the game, so we 'settled' for Ocala. Fortunately, and surprisingly, we fell in love with this small town. There is a great atmosphere, friendly people and lots to do.”*



*“Ocala is beautiful. Our old friends moved here last year, and we are thinking about joining them. Not too large a town and people are friendly!”*



# DETAILED FINDINGS



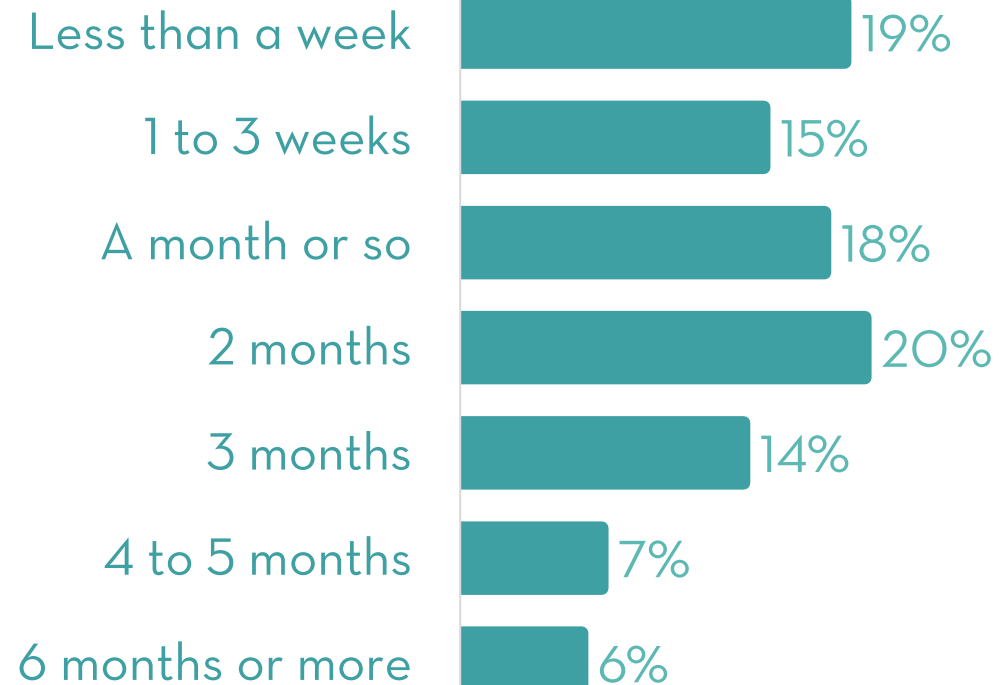


# VISITOR JOURNEY: PRE-VISIT



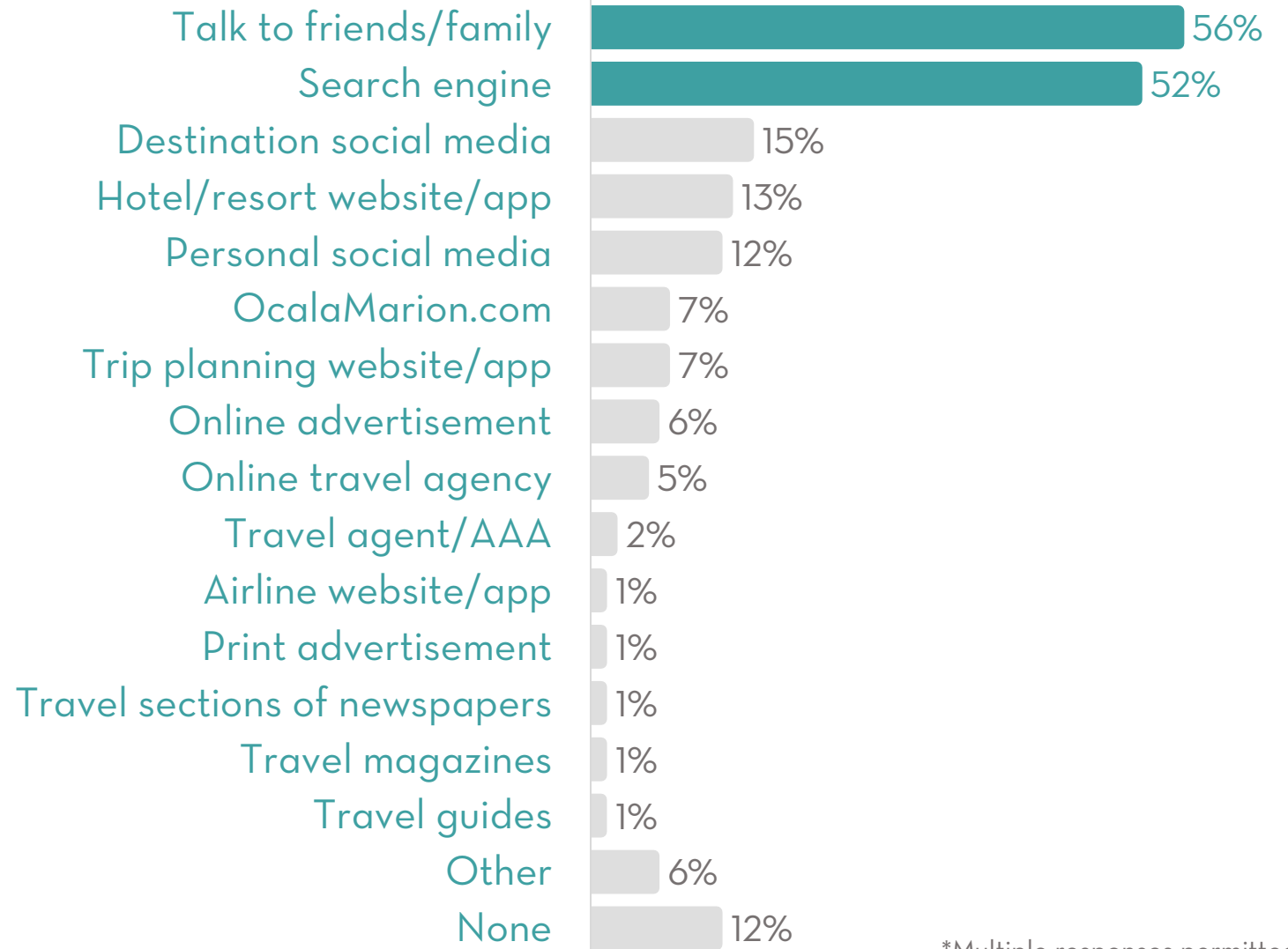
# TRIP PLANNING CYCLE

- » **Over half** visitors planned their trips to the Ocala/Marion County area **a month or less in advance**
- » On the other hand, **over 1 in 4** visitors planned their trips **at least 3 months in advance**
- » Visitors planned their trip **on average 53 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



\*Multiple responses permitted



# REASONS FOR VISITING\*

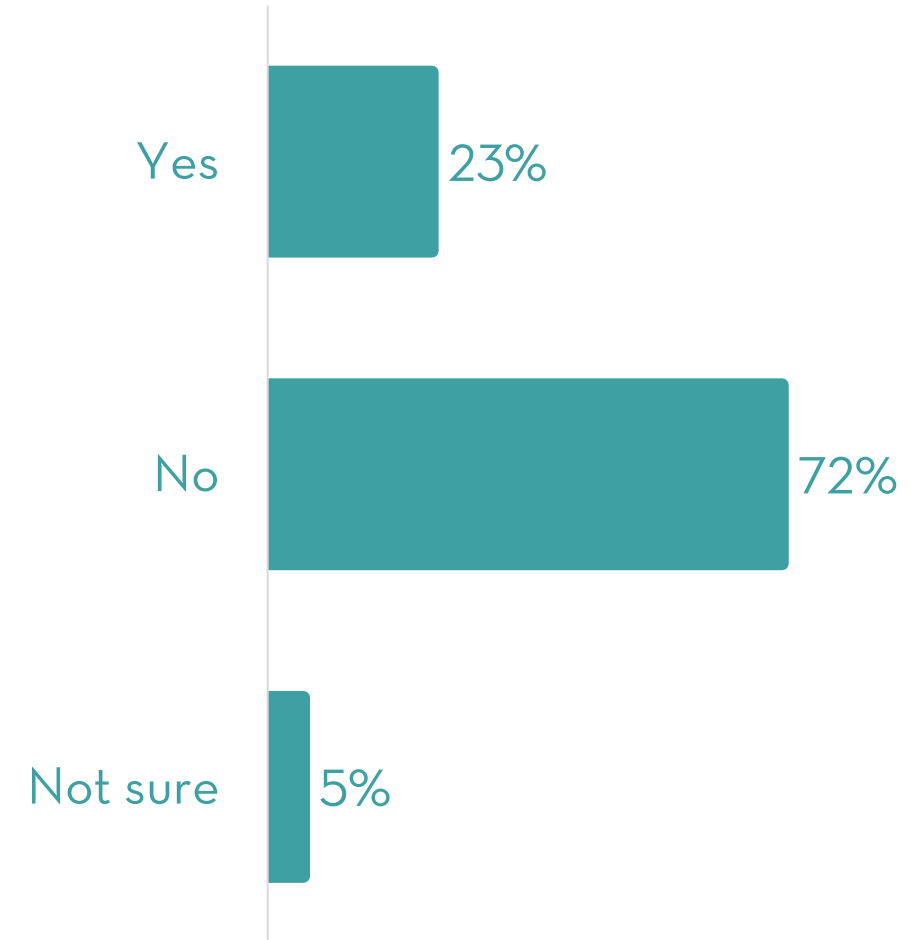
- » **Visiting friends and relatives** is the **number one** choice for coming, as **nearly 1 in 4** visitors came to Ocala/Marion County for this reason
- » **Nearly 1 in 6** visitors came to Ocala/Marion County for **horse-related events or sporting tournaments/events**



# RECALL OF ADVERTISING\*

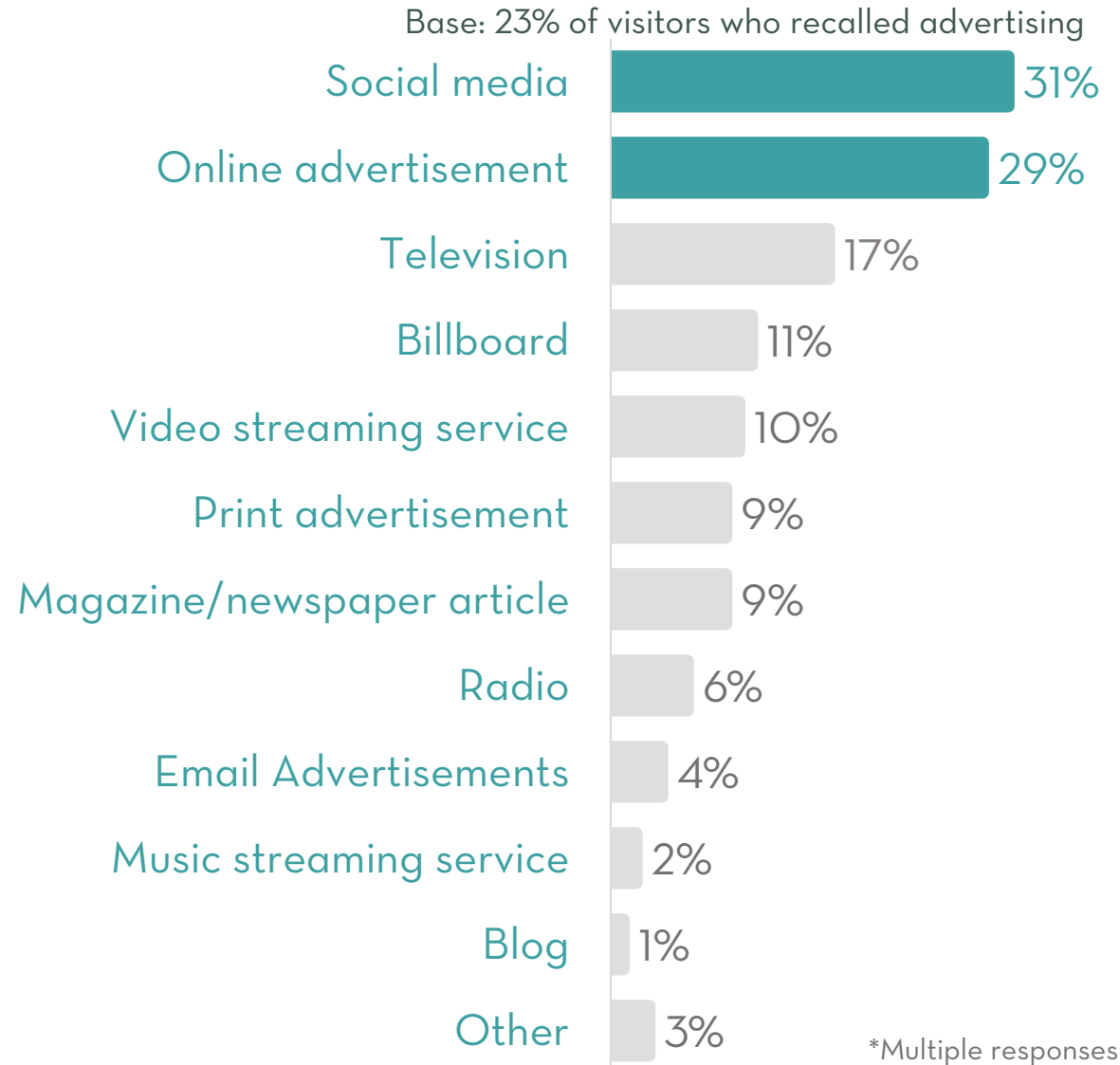
- » **Nearly 1 in 4** visitors recalled advertising about the Ocala/Marion County area
- » Of the visitors who recalled advertising, **3 in 4 (represents 17% of all visitors)** were influenced by this information to come to the area

## Recalled Advertising



# ADVERTISING SOURCE\*

- » **Over 3 in 10** visitors who recalled advertising for the Ocala/Marion County area recalled advertisements on **social media**
- » **Nearly 3 in 10** visitors recalled **online advertisements\*\***



\*Multiple responses permitted

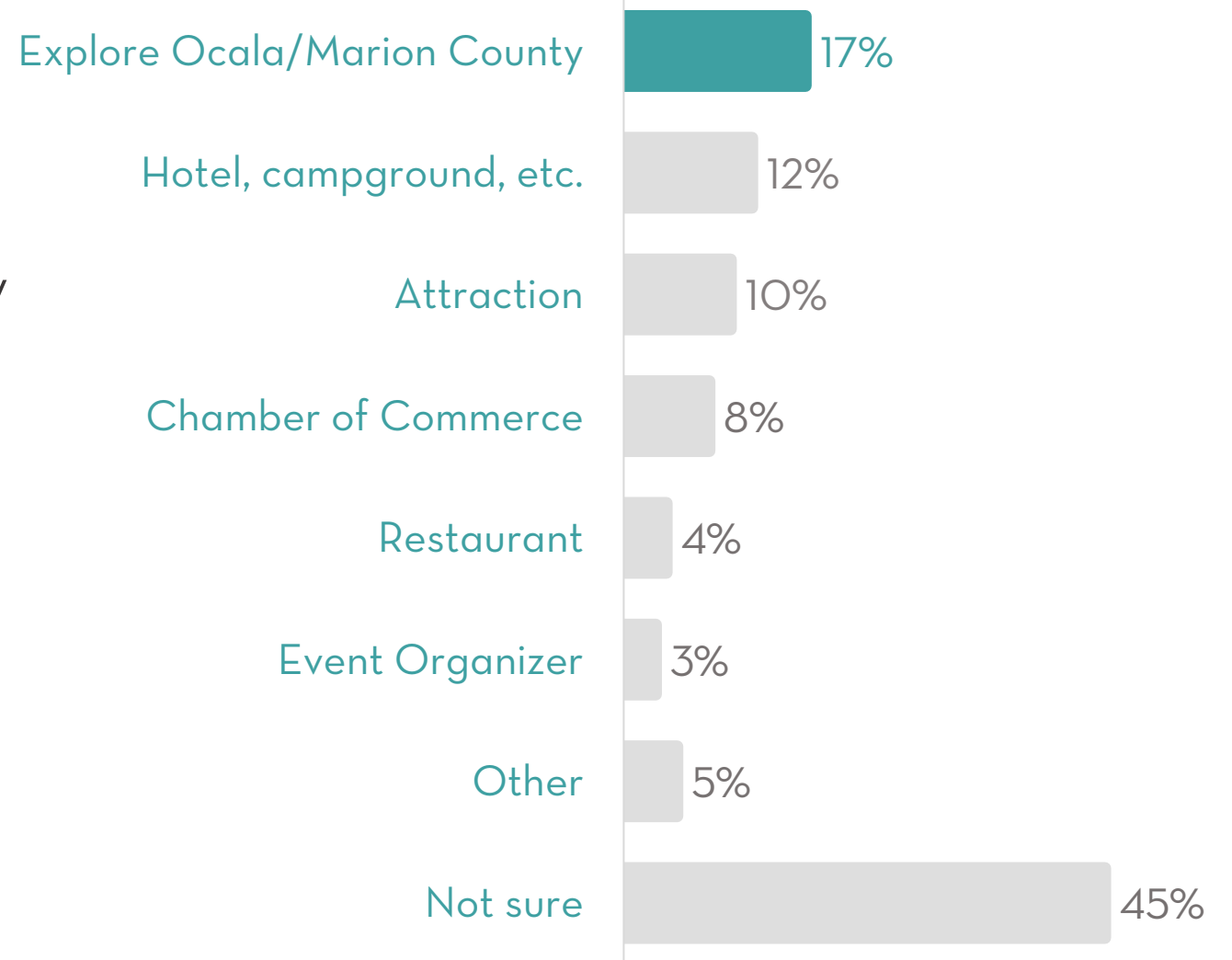
\*\* Advertising efforts mentioned on this slide include VCB's efforts and the efforts of other organizations.



# SPONSORED ADVERTISEMENT\*

- » **Over 1 in 6** visitors who recalled advertising for the Ocala/Marion County area recall **Explore Ocala/Marion County** as a sponsor of the advertisement
- » **Nearly 1 in 8** visitors stated that they recalled advertisements sponsored by a **hotel, campground, etc.**

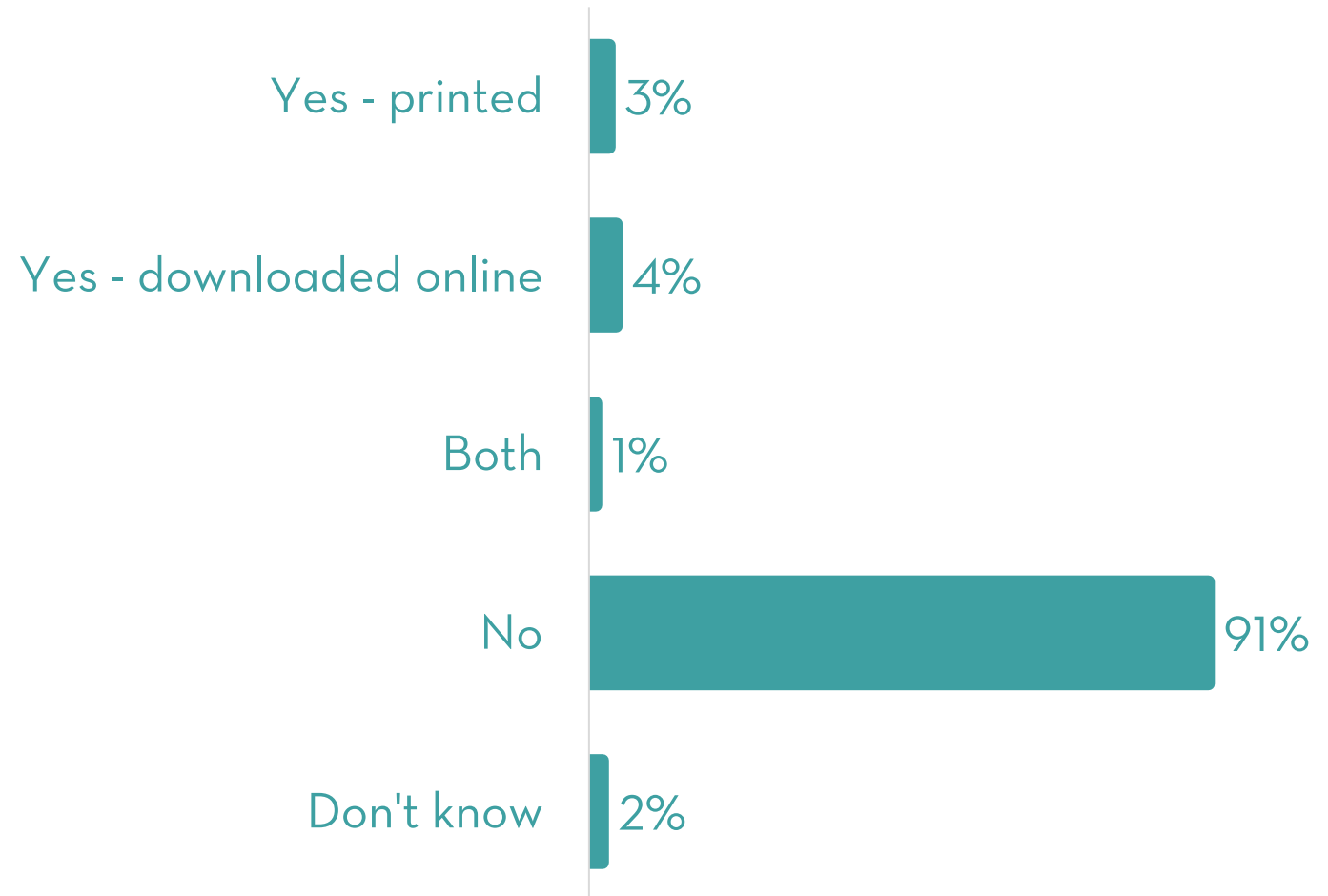
Base: 23% of visitors who recalled advertising



\*Multiple responses permitted.

# VISITOR GUIDE

- » **8%** of visitors viewed the **print and/or online visitor guide**
- » Usefulness Rating: **8.0 out of 10\***

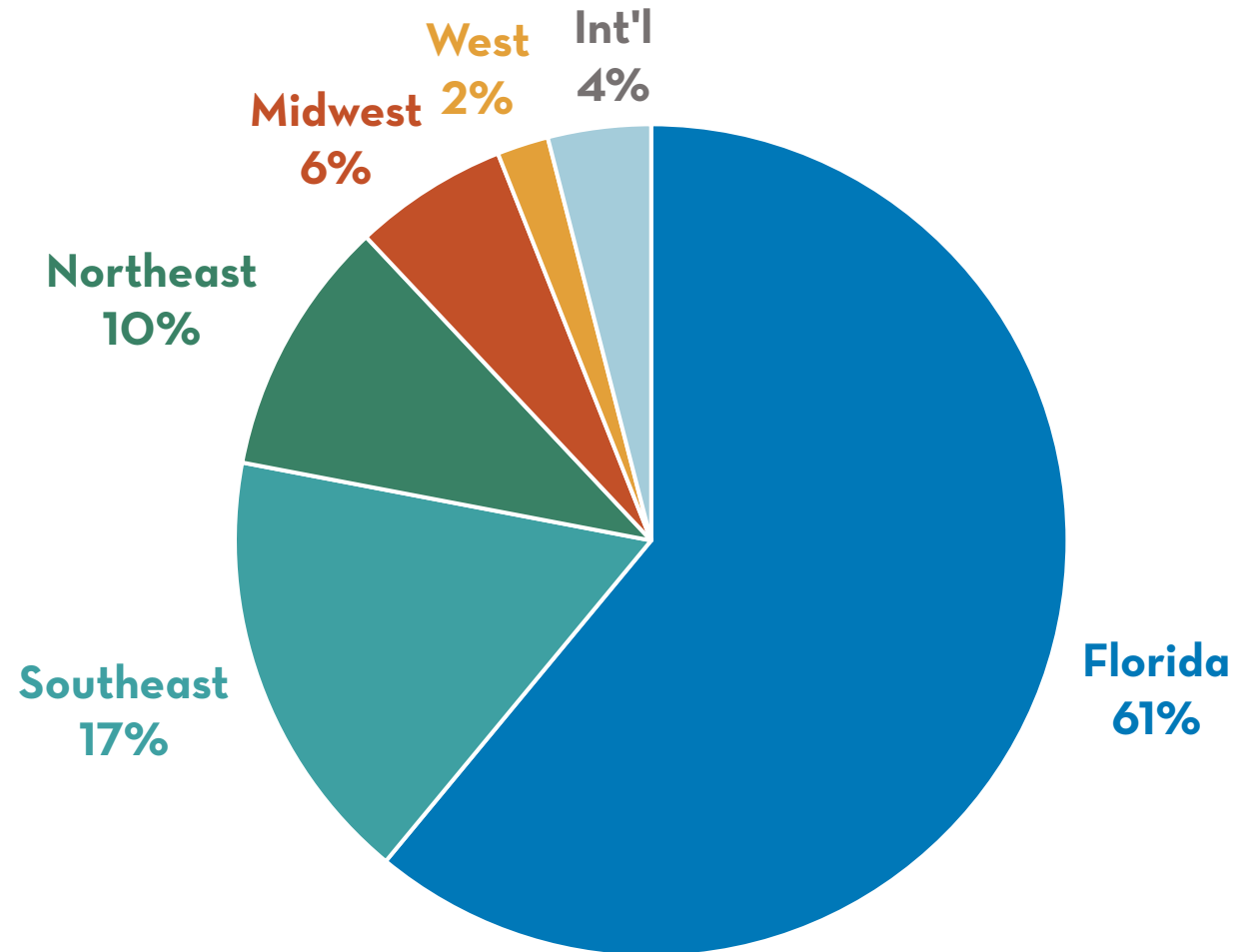


# VISITOR JOURNEY: TRAVEL PARTY PROFILE





# REGION OF ORIGIN



# TOP ORIGIN STATES

- » **4 in 5** visitors came to Ocala/Marion County from 8 states
- » **Florida** and **Georgia** were key origin states for the Ocala/Marion County area

State	Percent
Florida	61%
Georgia	6%
Texas	3%
Kentucky	2%
New Jersey	2%
New York	2%
Pennsylvania	2%
South Carolina	2%

# TOP ORIGIN MARKETS

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

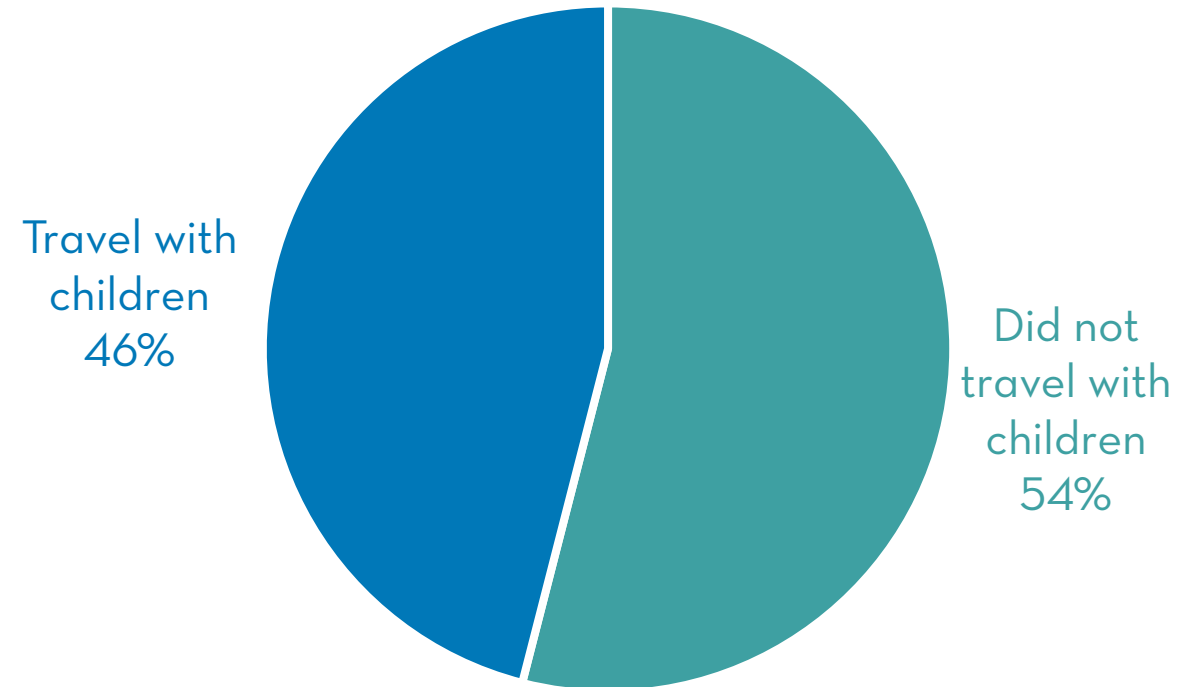
Market	Percent
Orlando-Daytona Beach-Melbourne	16%
Tampa-St. Petersburg	12%
Jacksonville	10%
Gainesville	6%
West Palm Beach-Ft. Pierce	5%
Atlanta	4%
Miami-Fort Lauderdale	4%
New York City*	3%
Tallahassee-Thomasville	3%
Fort Myers-Naples	2%
Philadelphia	2%

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

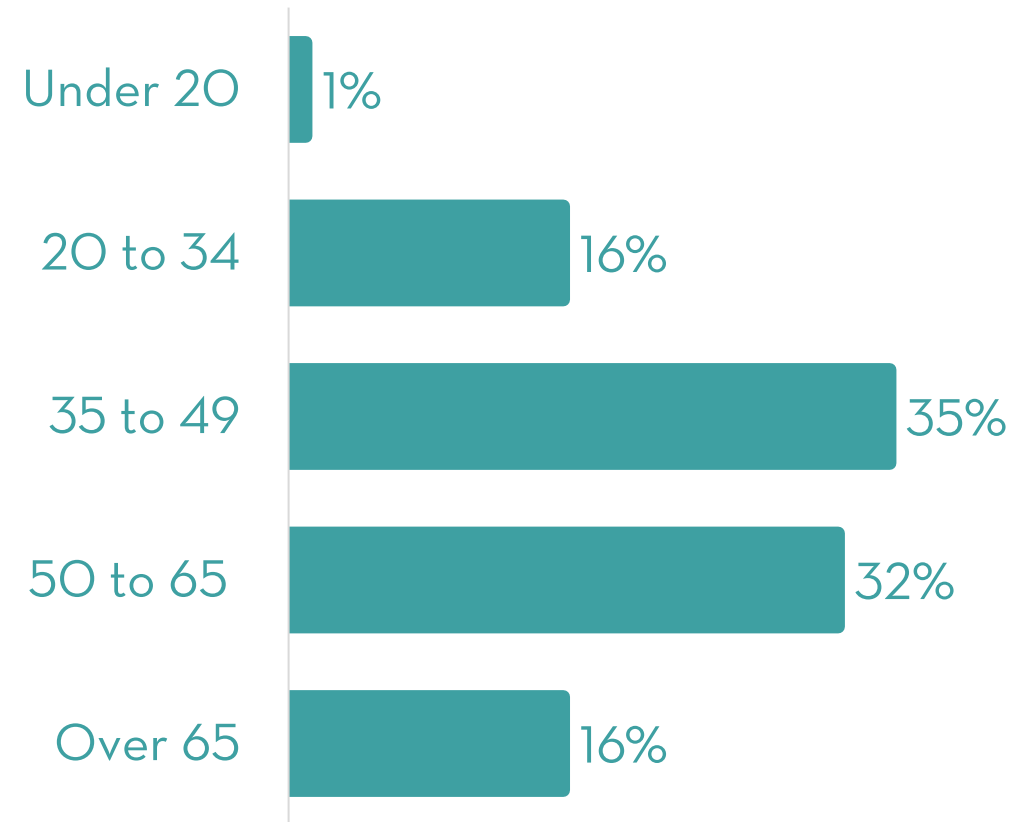


# TRAVEL PARTIES

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



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



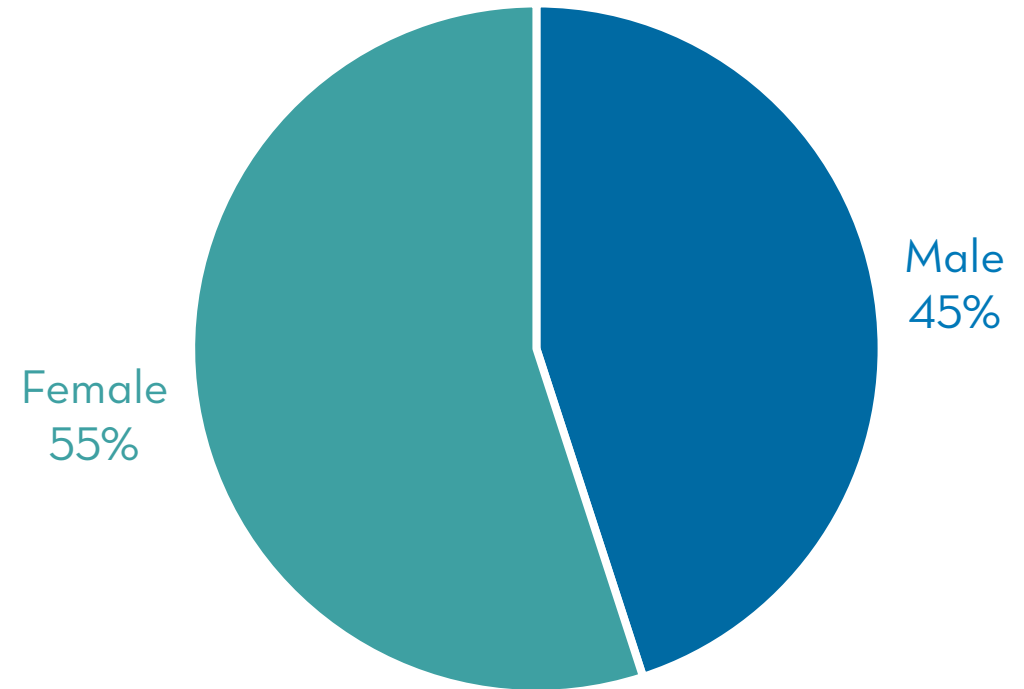
# HOUSEHOLD INCOME

- » Visitors to the Ocala/Marion County area had a median household income of **\$82,500** per year
- » **Over 1 in 3** visitors had household incomes over **\$100,000**



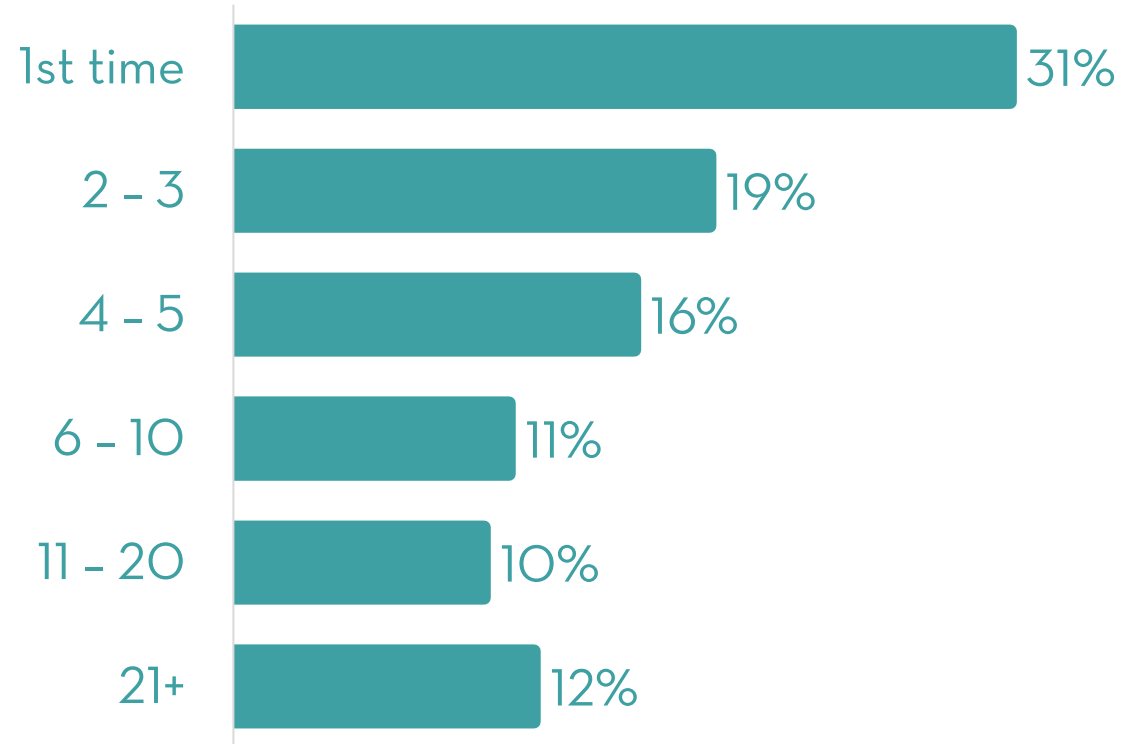


» **55%** of visitors interviewed were **female**



# NEW & RETURNING VISITORS

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



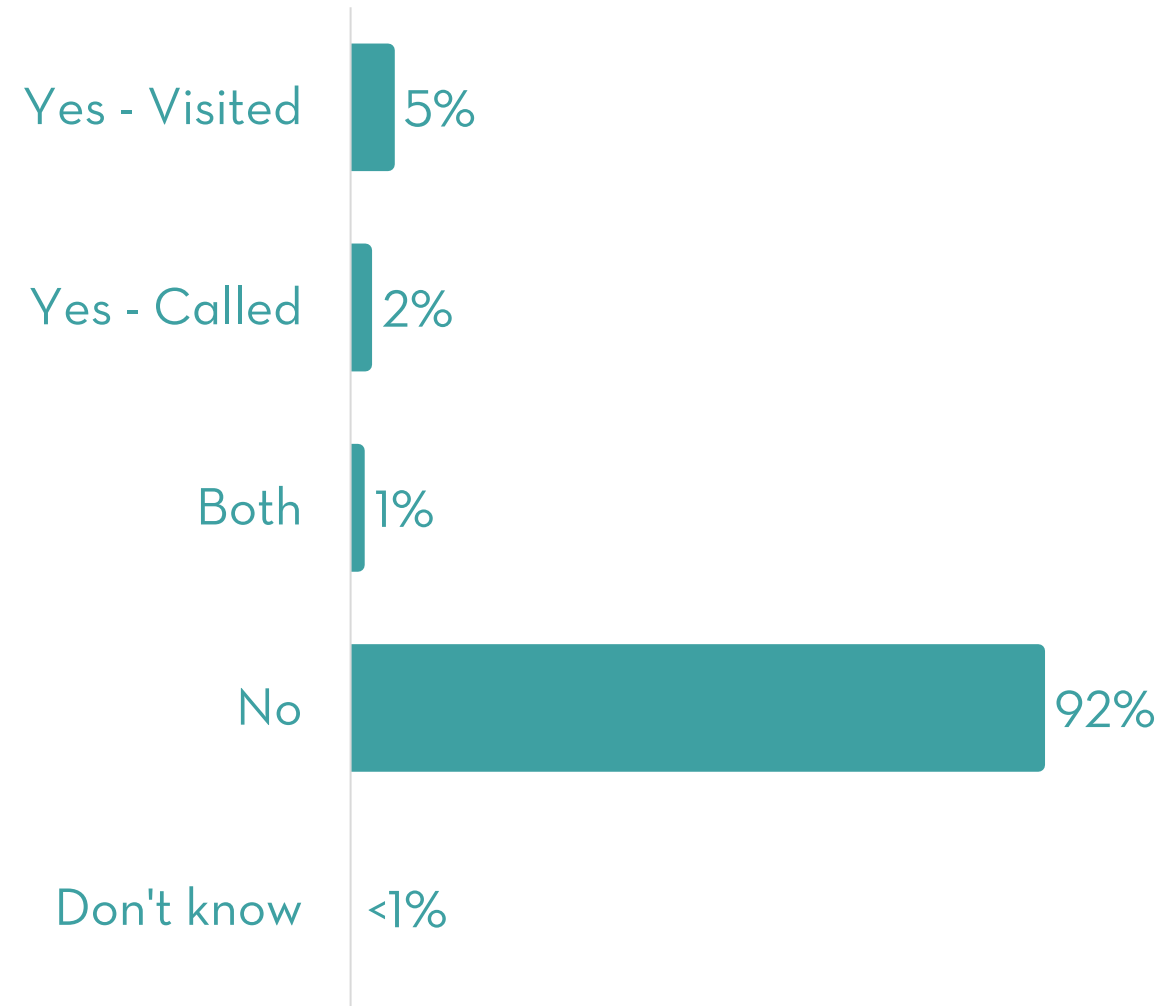
# VISITOR JOURNEY: TRIP EXPERIENCE





# VISITOR CENTER

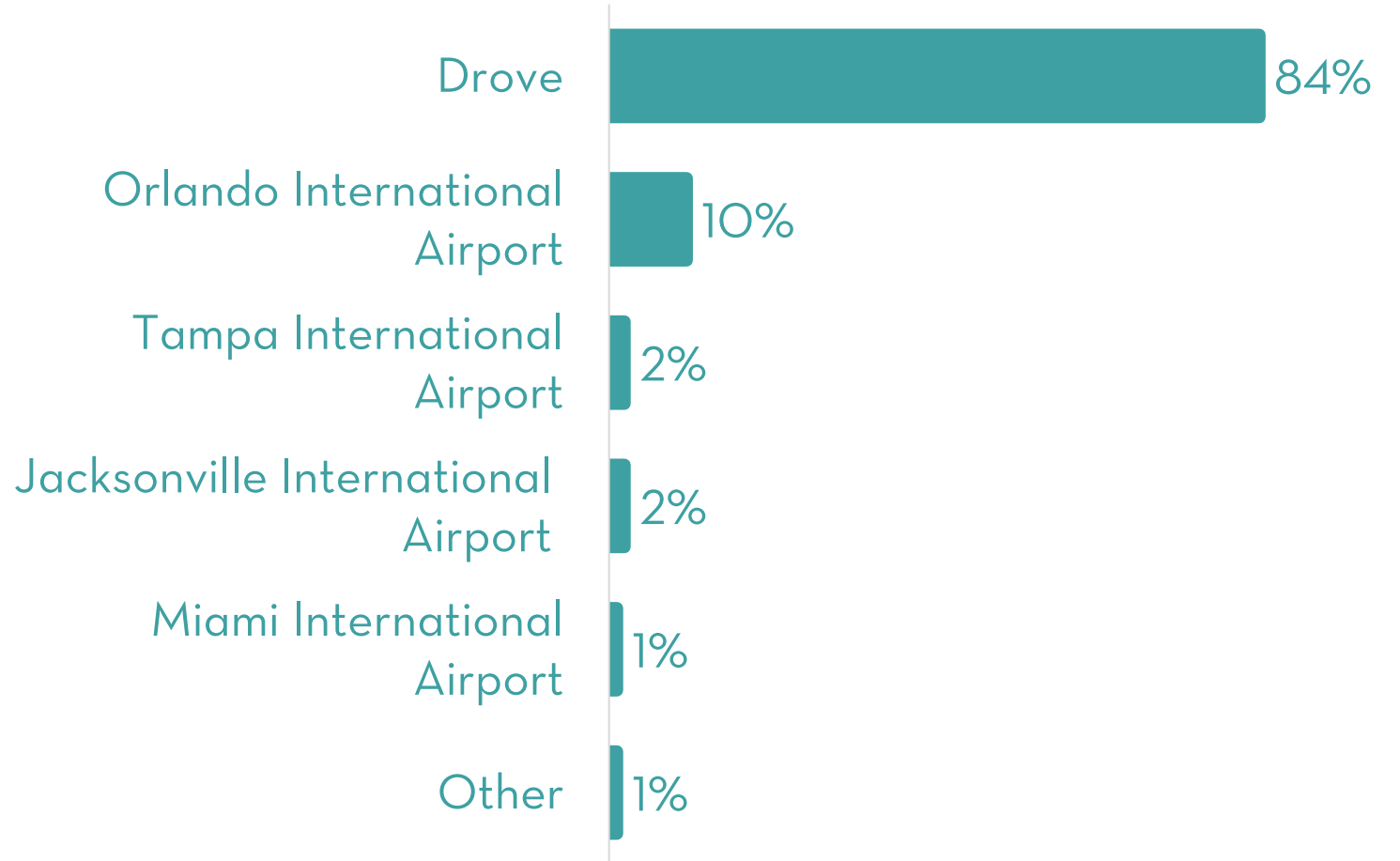
- » **8%** of visitors **stopped at the Visitor Center**
- » Usefulness Rating: **8.6 out of 10\***



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

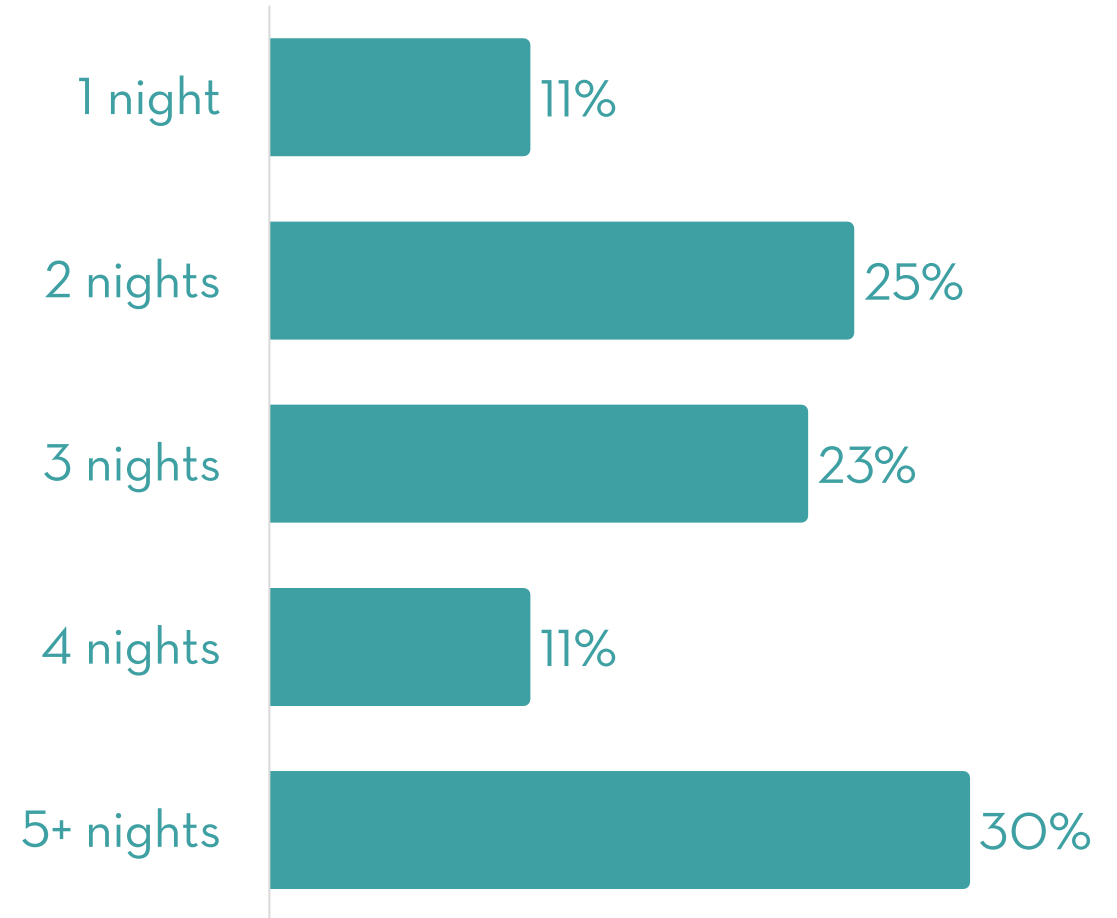
# TRANSPORTATION

- » **84%** of visitors **drove** to the Ocala/Marion County area for their trip
- » **10%** of **all** visitors used the **Orlando International Airport**



# NIGHTS

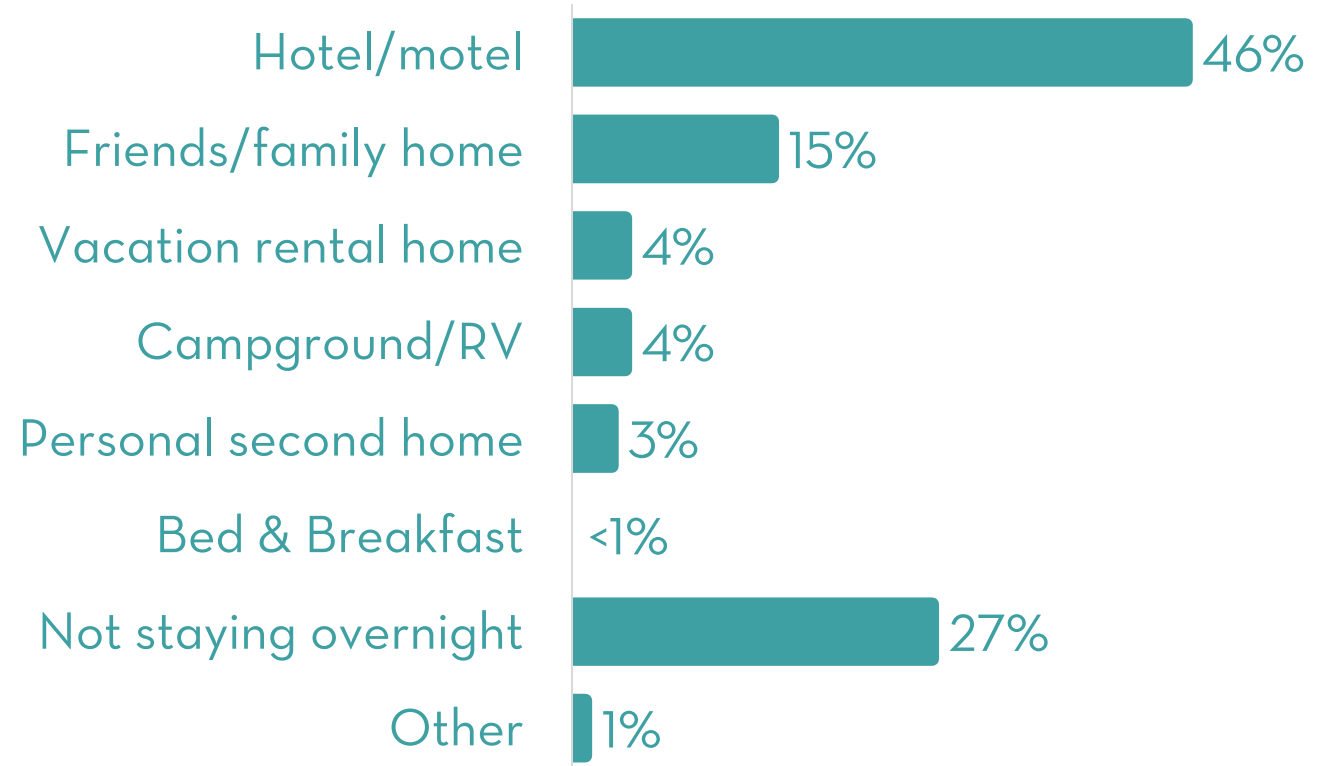
- » Visitors stayed **3.7** nights in Ocala/Marion County\*
- » Visitors staying in paid accommodations stayed **4.2** nights in the Ocala/Marion County area





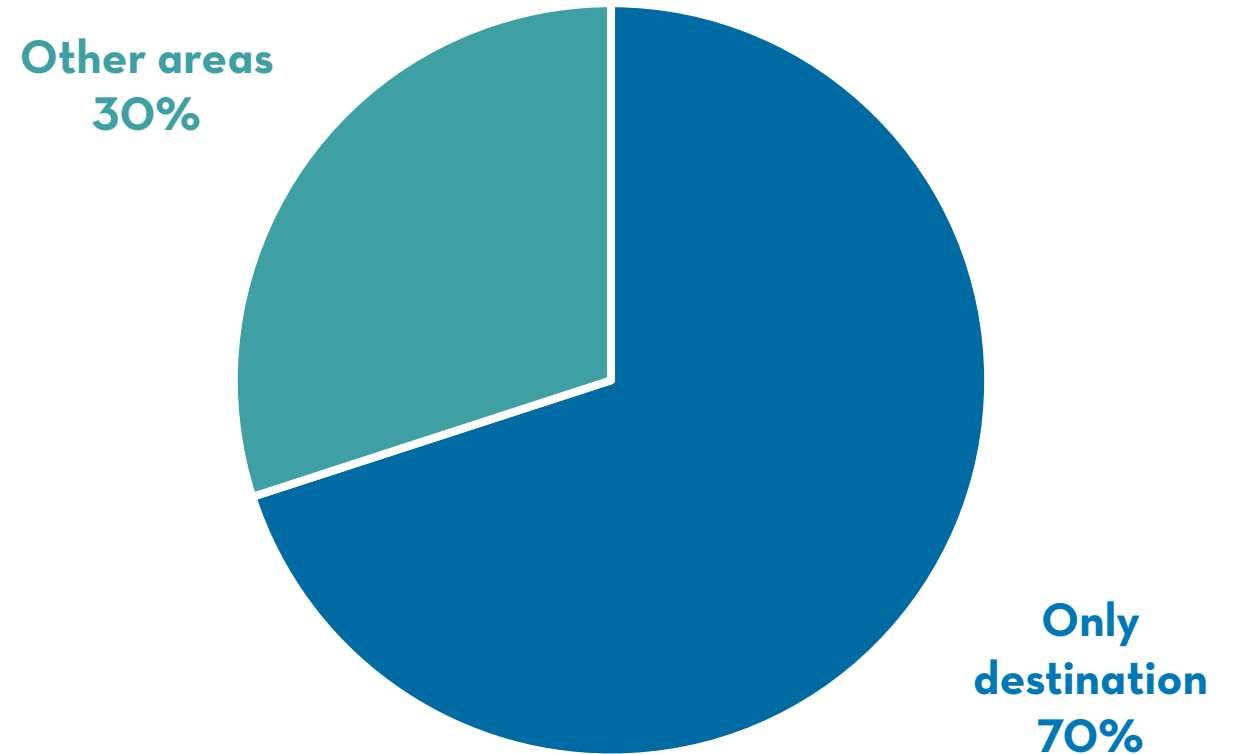
# ACCOMMODATIONS

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



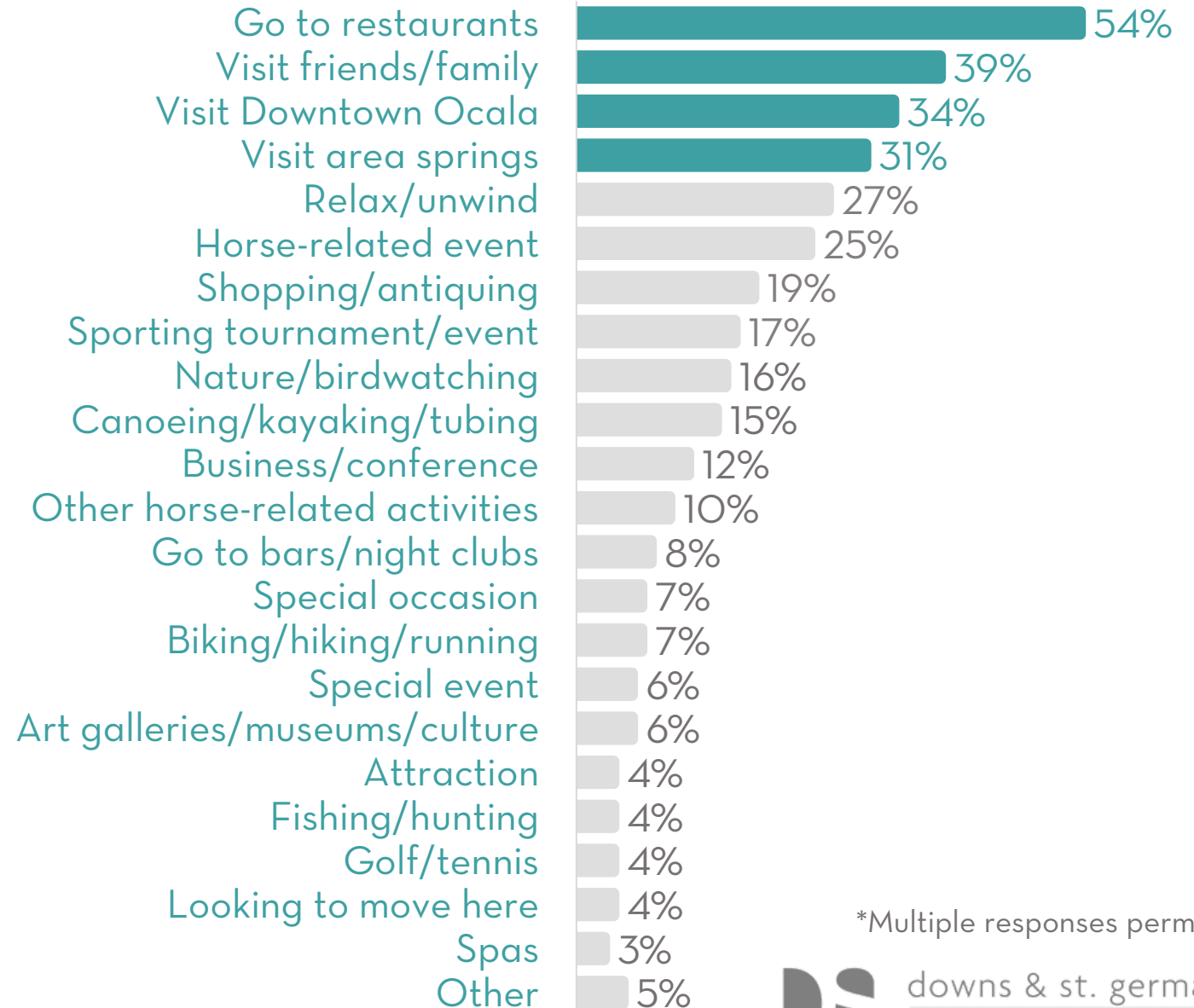
# VISITING OTHER AREAS

» **3 in 10** visitors were also visiting other destinations on their trip



# VISITOR ACTIVITIES\*

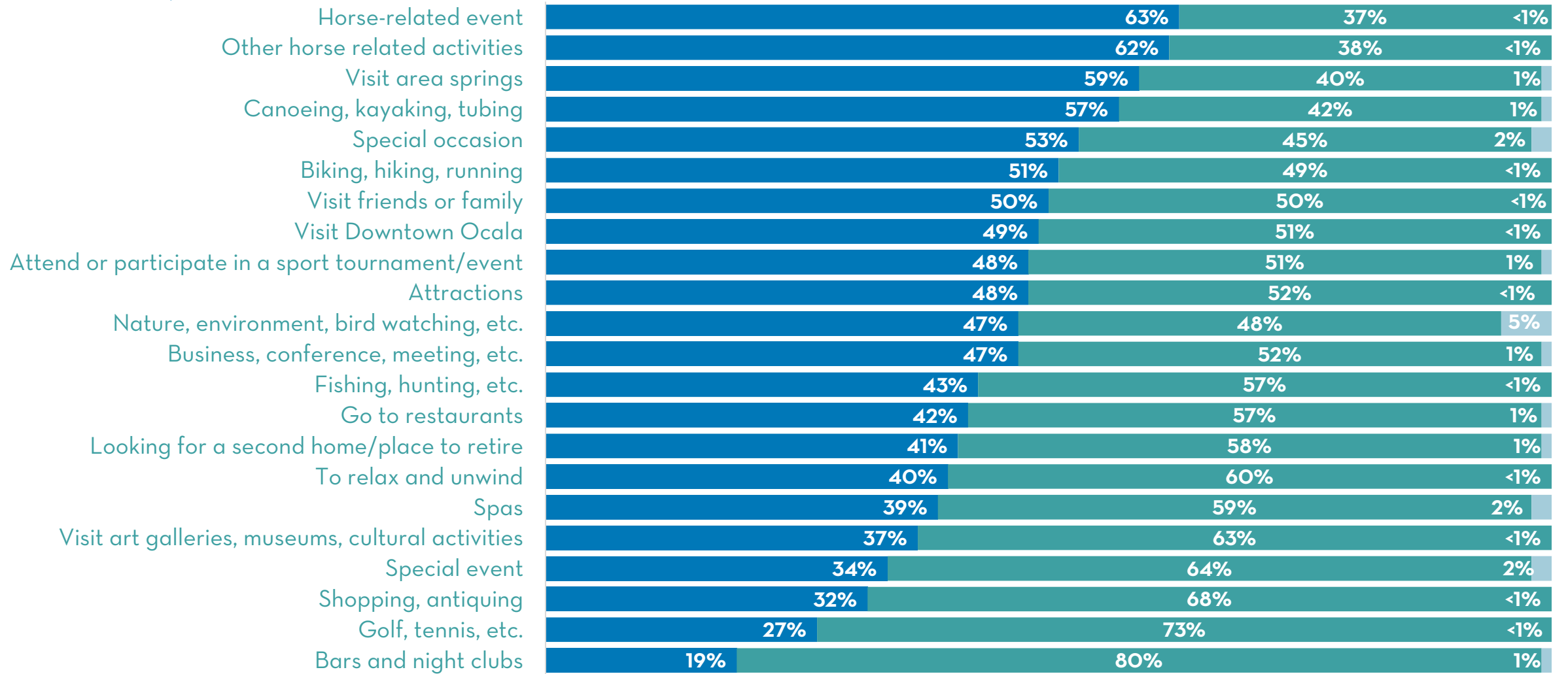
- » **Going to restaurants** is the number one activity, as **over half** of visitors went out to eat
- » **Nearly 2 in 5** visitors visited **friends and family**
- » **Over 1 in 3** visitors enjoyed **Downtown Ocala** during their visit
- » **Over 3 in 10** visitors enjoyed the **area springs** during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



\*Multiple responses permitted.



# VISITOR ACTIVITY RATINGS



# ACTIVITIES VS. REASON FOR VISIT\*

## Reason for Visiting

24%

16%

15%

14%

12%

9%

7%

5%

5%

5%

4%

3%

3%

3%

Visit friends/relatives

Horse-related event

Sporting tournament/event

Visit area springs

Relax and unwind

Business/conference

Canoeing/kayaking/tubing

Go to restaurants

Visit Downtown Ocala

Other horse-related events

Special occasion

Special event

Nature/birdwatching

Shopping/antiquing

## Visitor Activities

39%

25%

17%

31%

27%

12%

15%

54%

34%

10%

7%

6%

16%

19%

# TRAVEL PARTY SPENDING

	<b>Daily Spending: All Visitors</b>	<b>Total Spending: All Visitors</b>
<i>Accommodations</i>	<i>\$61<sup>1</sup></i>	<i>\$219<sup>1</sup></i>
<i>Restaurants</i>	<i>\$78</i>	<i>\$281</i>
<i>Groceries</i>	<i>\$23</i>	<i>\$82</i>
<i>Shopping</i>	<i>\$51</i>	<i>\$184</i>
<i>Entertainment</i>	<i>\$50</i>	<i>\$178</i>
<i>Transportation</i>	<i>\$30</i>	<i>\$109</i>
<i>Other</i>	<i>\$26</i>	<i>\$95</i>
<b>Total</b>	<b>\$319</b>	<b>\$1,148</b>

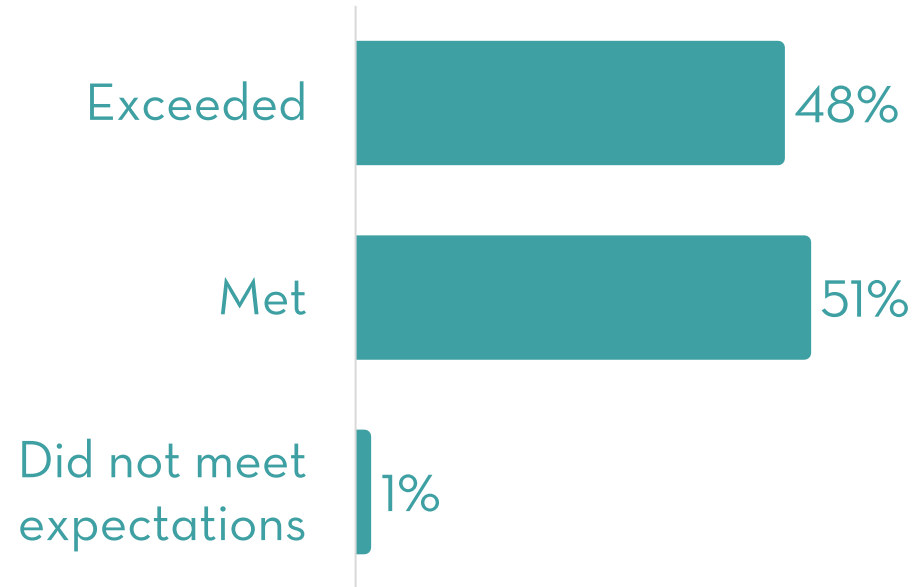
# VISITOR JOURNEY: POST-TRIP





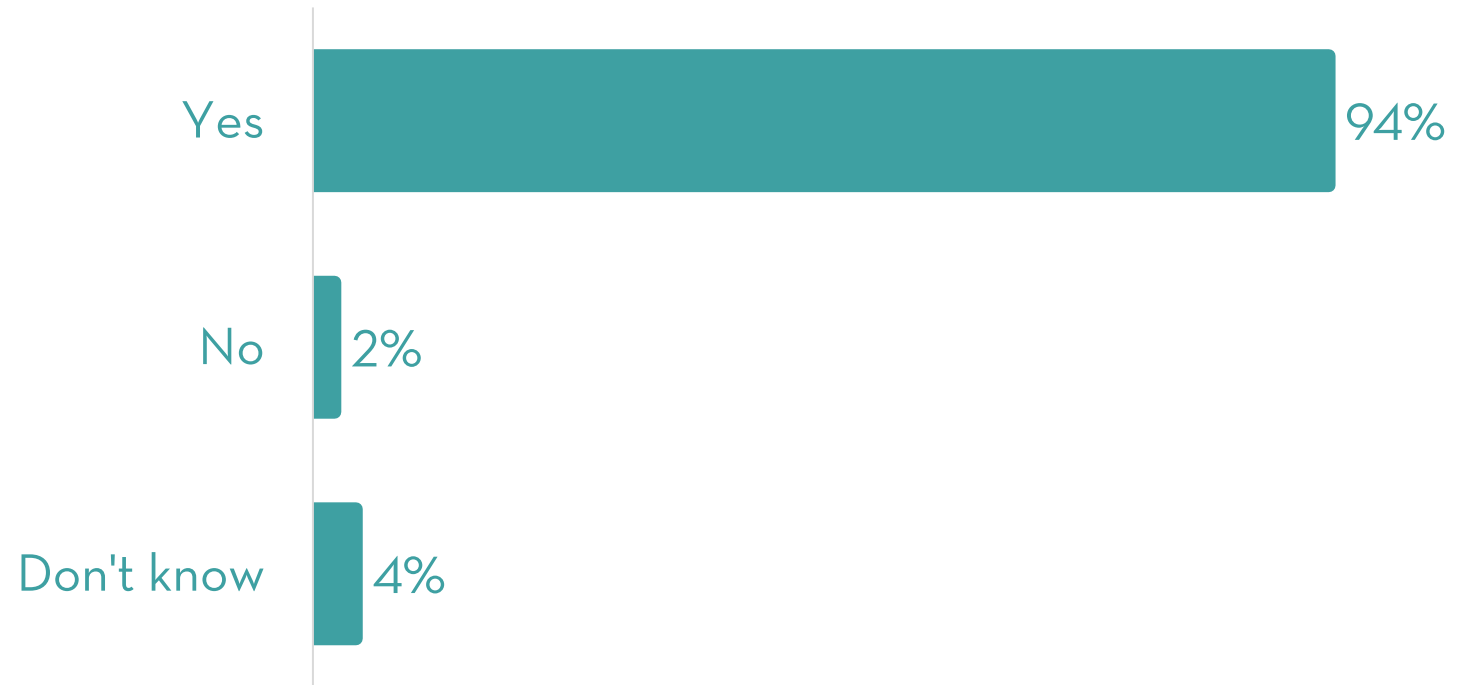
# TRIP EXPERIENCE

- » **Nearly half** of visitors' expectations were **exceeded** on their visit to the Ocala/Marion County area



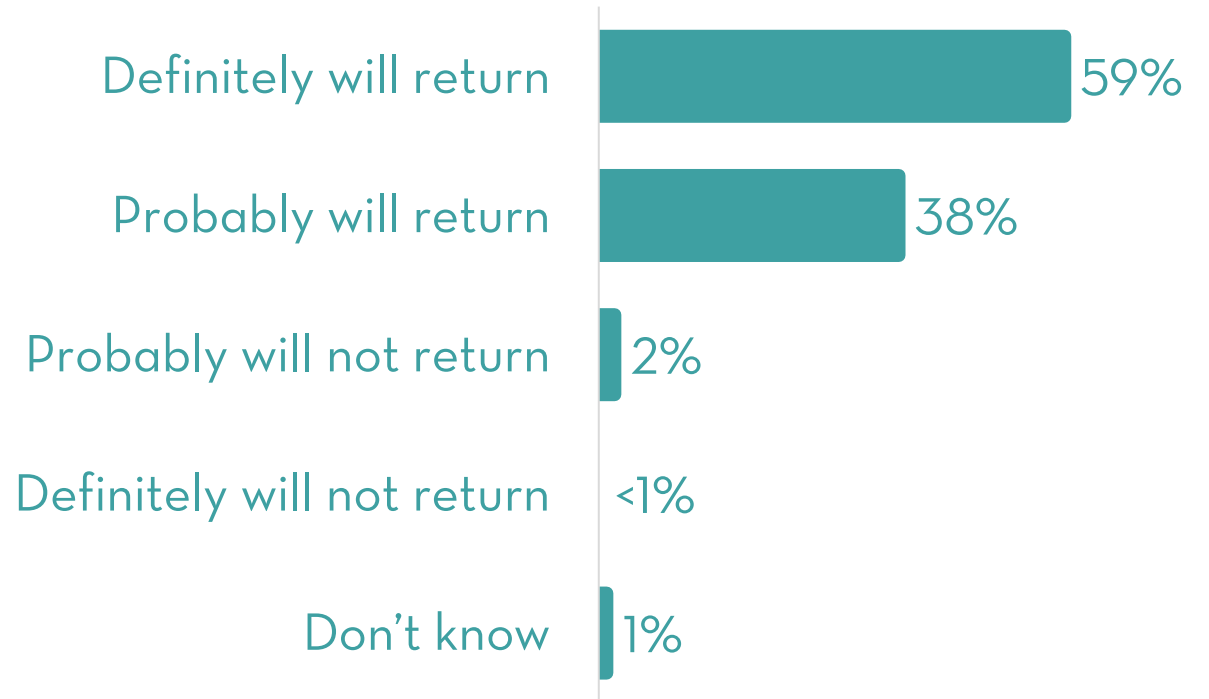
# RECOMMENDATION

» **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 likely 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	July - Sept 2023	July - Sept 2024
<i>Ocala/Marion County was the only destination</i>	63%	70%
<i>Viewed Visitors Guide</i>	10%	8%
<i>Stopped at Visitors Center</i>	6%	5%
<i>Planned trip a month or less in advance</i>	62%	52%
<i>Average number of days trip was planned in advance of it being taken</i>	49	53
<i>Used OcalaMarion.com to plan their trip</i>	10%	7%
<i>Recalled Ocala/Marion County promotions</i>	29%	23%

# PRE-VISIT

Reason for Visiting	July - Sept 2023	July - Sept 2024
<i>Visit friends/family</i>	28%	24%
<i>Horse-related event</i>	16%	16%
<i>Sporting tournament/event</i>	12%	15%
<i>Visit area springs</i>	14%	14%
<i>Relax/unwind</i>	19%	12%
<i>Business meeting/conference</i>	8%	9%
<i>Canoeing/kayaking/tubing</i>	6%	7%
<i>Visit Downtown Ocala</i>	9%	5%
<i>Go to restaurants</i>	8%	5%
<i>Other horse-related activities</i>	5%	5%
<i>Special occasion</i>	3%	4%

Reason for Visiting	July - Sept 2023	July - Sept 2024
<i>Special event</i>	3%	3%
<i>Shopping</i>	5%	3%
<i>Nature/environment</i>	7%	3%
<i>Looking for a second home/place to retire</i>	4%	2%
<i>Biking/hiking/running</i>	4%	2%
<i>Art galleries/museums/culture</i>	1%	2%
<i>Attraction</i>	2%	1%
<i>Go to bars/night clubs</i>	1%	1%
<i>Fishing/hunting</i>	2%	1%
<i>Golf/tennis</i>	1%	<1%
<i>Spas</i>	1%	<1%
<i>Other</i>	5%	8%

# TRAVEL PARTY PROFILE

Top Origin Markets	July - Sept 2023	July - Sept 2024
<i>Orlando - Daytona Beach - Melbourne</i>	17%	16%
<i>Tampa - St. Petersburg</i>	9%	12%
<i>Jacksonville</i>	6%	10%
<i>Gainesville</i>	4%	6%
<i>West Palm Beach-Ft. Pierce</i>	3%	5%
<i>Atlanta</i>	3%	4%
<i>Miami - Ft. Lauderdale</i>	6%	4%
<i>New York City*</i>	4%	3%
<i>Tallahassee-Thomasville</i>	2%	3%

Top Origin States	July - Sept 2023	July - Sept 2024
<i>Florida</i>	54%	61%
<i>Georgia</i>	4%	6%
<i>Texas</i>	2%	3%
<i>New York</i>	2%	2%
<i>South Carolina</i>	2%	2%
<i>New Jersey</i>	2%	2%
<i>Pennsylvania</i>	2%	2%
<i>Kentucky</i>	1%	2%

Top Origin Regions	July - Sept 2023	July - Sept 2024
<i>Southeast (includes Florida)</i>	71%	78%
<i>Northeast</i>	12%	10%
<i>Midwest</i>	9%	6%
<i>West</i>	4%	2%
<i>International</i>	4%	4%

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

# TRIP EXPERIENCE

Visitor Metrics	July - Sept 2023	July - Sept 2024
<i>Travel party</i>	3.2	2.9
<i>Children &lt;18</i>	47%	46%
<i>Median age</i>	48	49
<i>Estimated median household income</i>	\$75,000	\$82,500
<i>1<sup>st</sup> time visitor</i>	23%	31%
<i>10+ visits to Ocala/Marion County</i>	29%	22%

Visitor Metrics	July - Sept 2023	July - Sept 2024
<i>Drove</i>	84%	84%
<i>Nights spent</i>	4.0	3.7
<i>Direct expenditures (entire trip)</i>	\$1,424	\$1,148



# TRIP EXPERIENCE

Visitor Activities	July - Sept 2023	July - Sept 2024
<i>Go to restaurants</i>	45%	54%
<i>Visit friends or family</i>	38%	39%
<i>Visit Downtown Ocala</i>	29%	34%
<i>Visit area springs</i>	29%	31%
<i>Relax and unwind</i>	33%	27%
<i>Horse-related event</i>	21%	25%
<i>Shopping</i>	25%	19%
<i>Attend/participate in a sport tournament/event</i>	12%	17%
<i>Nature/environment</i>	21%	16%
<i>Canoeing/kayaking/tubing</i>	13%	15%
<i>Business meeting/conference</i>	9%	12%
<i>Other horse-related activities</i>	8%	10%

Visitor Activities	July - Sept 2023	July - Sept 2024
<i>Go to bar/night clubs</i>	8%	8%
<i>Special occasion</i>	5%	7%
<i>Biking/hiking/running</i>	12%	7%
<i>Special event</i>	4%	6%
<i>Art galleries/museums/cultural events</i>	6%	6%
<i>Attraction</i>	6%	4%
<i>Fishing/hunting</i>	9%	4%
<i>Golf/tennis</i>	8%	4%
<i>Looking for a second home/place to retire</i>	7%	4%
<i>Spas</i>	4%	3%
<i>Other</i>	5%	5%

# POST TRIP EVALUATION

Satisfaction Metrics	July - Sept 2023	July - Sept 2024
<i>Visit Met + Exceeded expectations</i>	99%	99%
<i>Will return to Ocala/Marion County</i>	96%	97%
<i>Will recommend Ocala/Marion County</i>	92%	94%

# Ocala/MARION COUNTY VCB

Economic Impact Study &  
Visitor Tracking Report  
July - Sept 2024

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