

OCALA/MARION COUNTY VCB

Economic Impact Study
FY2025
October 2024 - September 2025



ECONOMIC IMPACT





ECONOMIC SNAPSHOT

- » Ocala, like much of the rest of US, is seeing a downturn of visitor statistics from FY2025. This normalization is due to a variety of factors, visitors being more price conscious in their travel decisions as they consider the overall economy, which has impacted lower income household to a greater extend than higher income households., and a struggling international perception of traveling to the US.
- » Tourism Development Tax saw a sizeable increase compared to other lodging statistics; this is in part due to an increase in compliance led by the Marion County Tax Collector Office as well as an increase in units and average daily rate
- » Decreases in spending were largely driven by decreases to entertainment and shopping
- » The net impact of local government revenue from visitors less the cost of servicing visitors is \$5,915,200
- » Ocala residents save \$453 in household state and local tax savings due to visitors staying in the area.

ECONOMIC IMPACT

Visitor Spending in FY 2025 (Oct 2024 - Sept 2025) generated a total economic impact of

\$956,452,100

in Marion County

A decrease of **0.8%***

from FY2024 (Oct 2023 - Sept 2024)

*The economic impact analysis process has been updated to align with current IMPLAN data models. As a result, previous years' figures have been revised using the updated methodology. IMPLAN models are based on government data sources (e.g., BEA, BLS, Census, etc.) that lag behind this report's calendar year, therefore future updates may occur as newer datasets become available. This Economic Impact analysis does not account for leakage outside of Marion County (i.e., the cost of wholesale and retail trade services that do not continue to circulate within the county's economy). 4



DIRECT SPENDING

Visitors who traveled to Ocala/Marion County in FY2025 spent

\$664,798,900

in Marion County on accommodations, restaurants, groceries, transportation, attractions, entertainment, and shopping

A decrease of **0.2%**
from FY2024



VISITORS

Ocala/Marion County attracted
1,329,800
visitors in FY2025

A decrease of **7.3%**
from FY2024



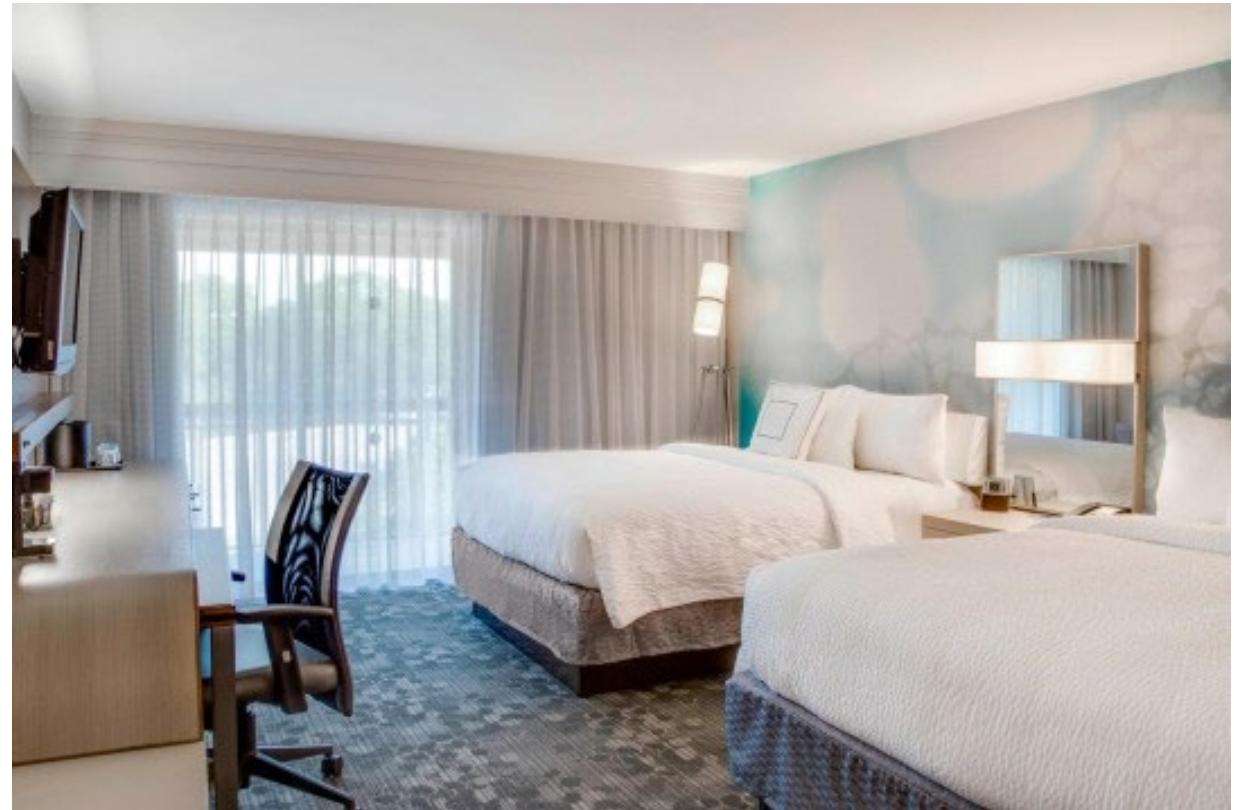
ROOM NIGHTS*

Ocala/Marion County visitors
generated

1,172,400

room nights in paid accommodations
in FY2025

An increase of **5.6%**
from FY2024



*Room nights increased while having fewer visitors due to a variety of factors including, an increase in the percentage of paid visitors compared to other visitor types, flat occupancy year over year, and a 5.8% (+1,190 units) increase in units compared to FY2024

TOURISM DEVELOPMENT TAX*

Paid accommodations and vacation rentals by visitors to Ocala/Marion County in FY2025 generated

\$6,789,255

in TDT collected

An increase of **23.9%***

from FY2024



*The increase in this figure is reflective of multiple factors including, an increase in room nights, units, ADR and the Marion County Tax Collector increased efforts on compliance amongst paid accommodations

TOURISM SNAPSHOT: FY2025

58.9%

Occupancy

0.0%

from FY2024

\$126.21

Average Daily Rate

↑ 3.2%

from FY2024

\$74.33

RevPAR

↑ 4.0%

from FY2024

JOBS & WAGES*

Tourism in Ocala/Marion County
supported

8,670 (-4.0%)

jobs in FY2025, supporting

\$296,839,700 (-1.0%)

in wages and salaries



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VISITORS SUPPORT JOBS

An additional Ocala/Marion County job is supported by every

153

visitors



NET TAX BENEFIT*

Visitors in FY2025 generated a net tax benefit of

\$5,915,200

to Marion County government



Visitors contribute revenue to Marion County government via taxes and user fees. Visitors, by using county services and infrastructure, cost Marion County government money. The net impact of local government revenue from visitors less the cost of servicing visitors is \$5,915,200

$$\$5,915,200 = \$28,378,600 - \$22,463,400$$

*Net benefit Local Taxes supported by visitor Cost to county to service visitors

HOUSEHOLD SAVINGS

Visitors to Ocala/Marion County
save local residents

\$453

per household in
state and local taxes* every year



State & Local Taxes Supported = \$82,005,813 / Total Households (181,155) = \$453 in savings per household

*Economic impact models have been updated to account for IMPLAN 5-year updates that impact key economic figures. These updates effect previously reported Economic impact figures like Economic Impact, Jobs, Wages and Taxes. For direct comparisons, FY2024 and FY2023 have been updated using the most updated figures as well. This modeling does not account for leakages.

MARKETING SPENDING

Every dollar spent by the Ocala/Marion County VCB on marketing is associated with

\$49¹

in visitor spending in Marion County



¹The calculation is based visitor spending in Ocala/Marion County multiplied by the percent of total visitors who recalled advertisements and were influenced by said advertisements divided by the Ocala/Marion County VCB marketing spend

VISITOR PROFILE





TOURISM SNAPSHOT

- » More visitors recalled seeing, reading, or hearing an advertisement, promotion, or travel story about the area, +6% points compared with the previous fiscal year.
- » April-June 2025 visitors exhibit longer planning windows, creating additional opportunities to reach them with targeted messaging about the destination and its offerings. The typical planning window throughout the year was consistent with 2024, suggesting that the destination appeals to the market less responsive to the overall economic fluctuations.
- » The area attracted more first-time visitors in 2025 compared with 2024 (+7% points), and those who are seeking dining (+9% points) and shopping/antiquing experiences (+5% points).
- » Consistent with the quadrant analysis*, visitors most frequently participated in and reported exceeding expectations for activities such as nature and birdwatching, horse-related events, and visits to the area's springs.
- » Additionally, some activities, though pursued less often, consistently exceed expectations and represent strong marketing opportunities. These include canoeing/kayaking/tubing, other horse-related activities, sporting tournaments, and attractions like Fort King and Canyon Zipline.

*Analysis of visitor activities using their frequency and expectation rating (i.e., exceeded, met, and did not meet).

FY2025 VISITOR PROFILE



50

Median Age

37%

First-time Visitor

\$96,300

Median Household Income

39%

Traveled With Children

2.8

Travel Party Size

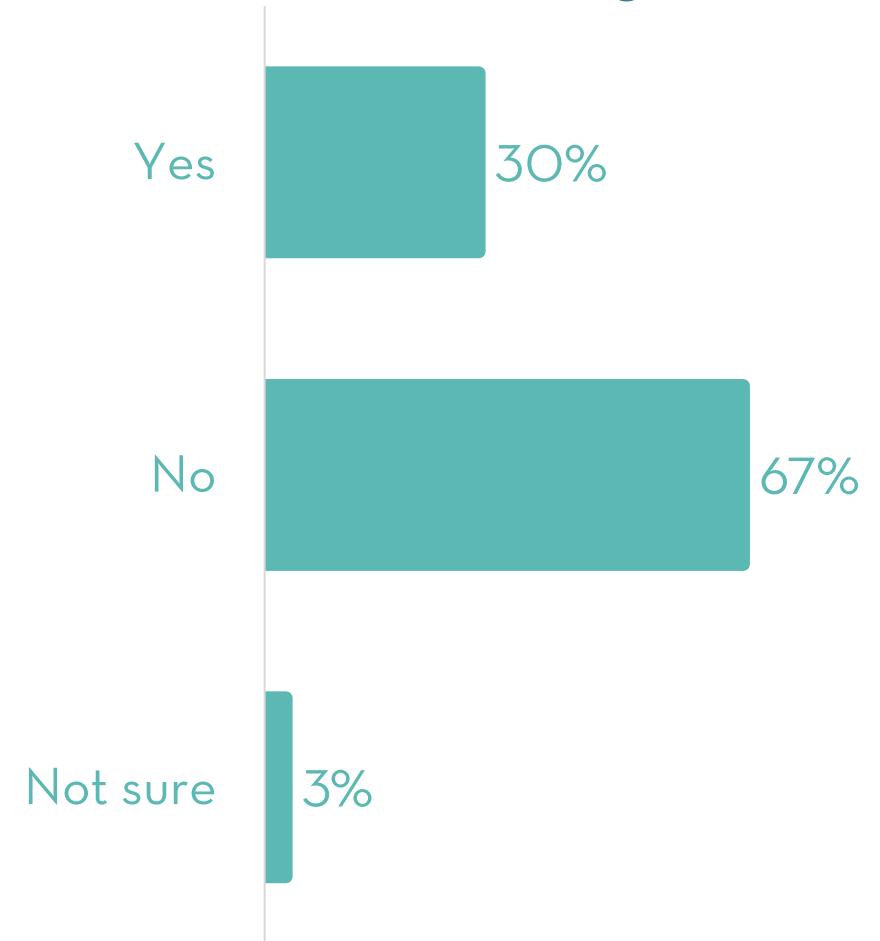
4.1

Length Of Stay

FY2025 RECALL OF ADVERTISING

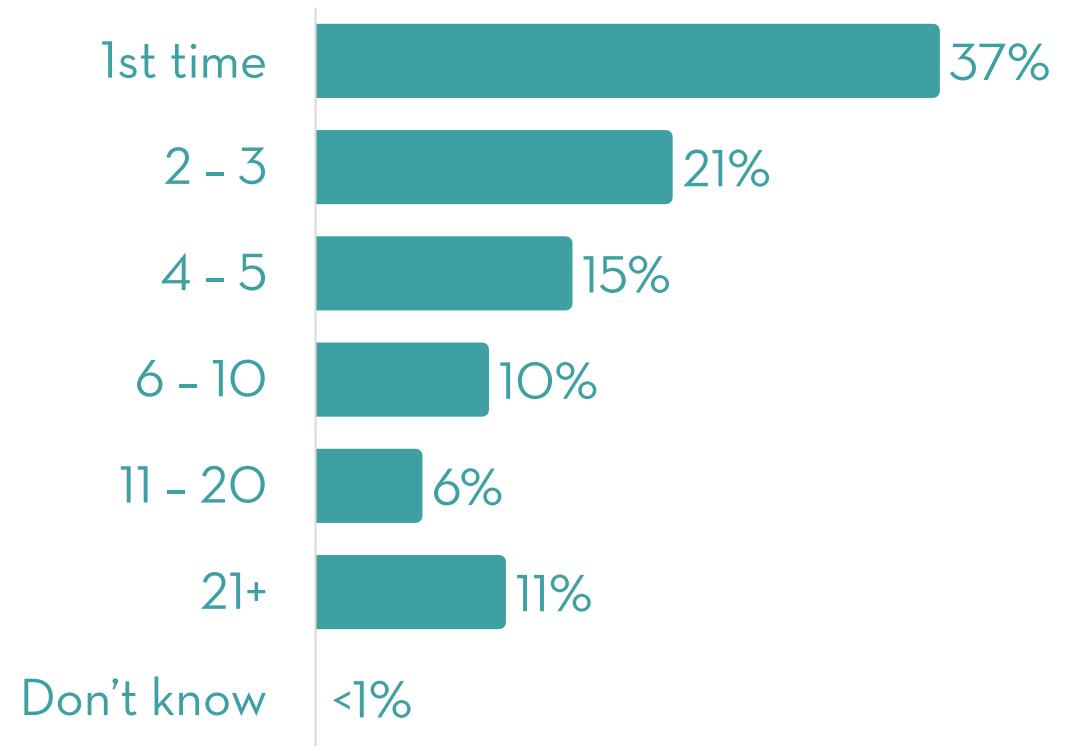
- » **3 in 10** visitors recalled advertising about the Ocala/Marion County area
- » Of the visitors who recalled advertising, **7 in 10** were influenced by this information to come to the area

Recalled Advertising

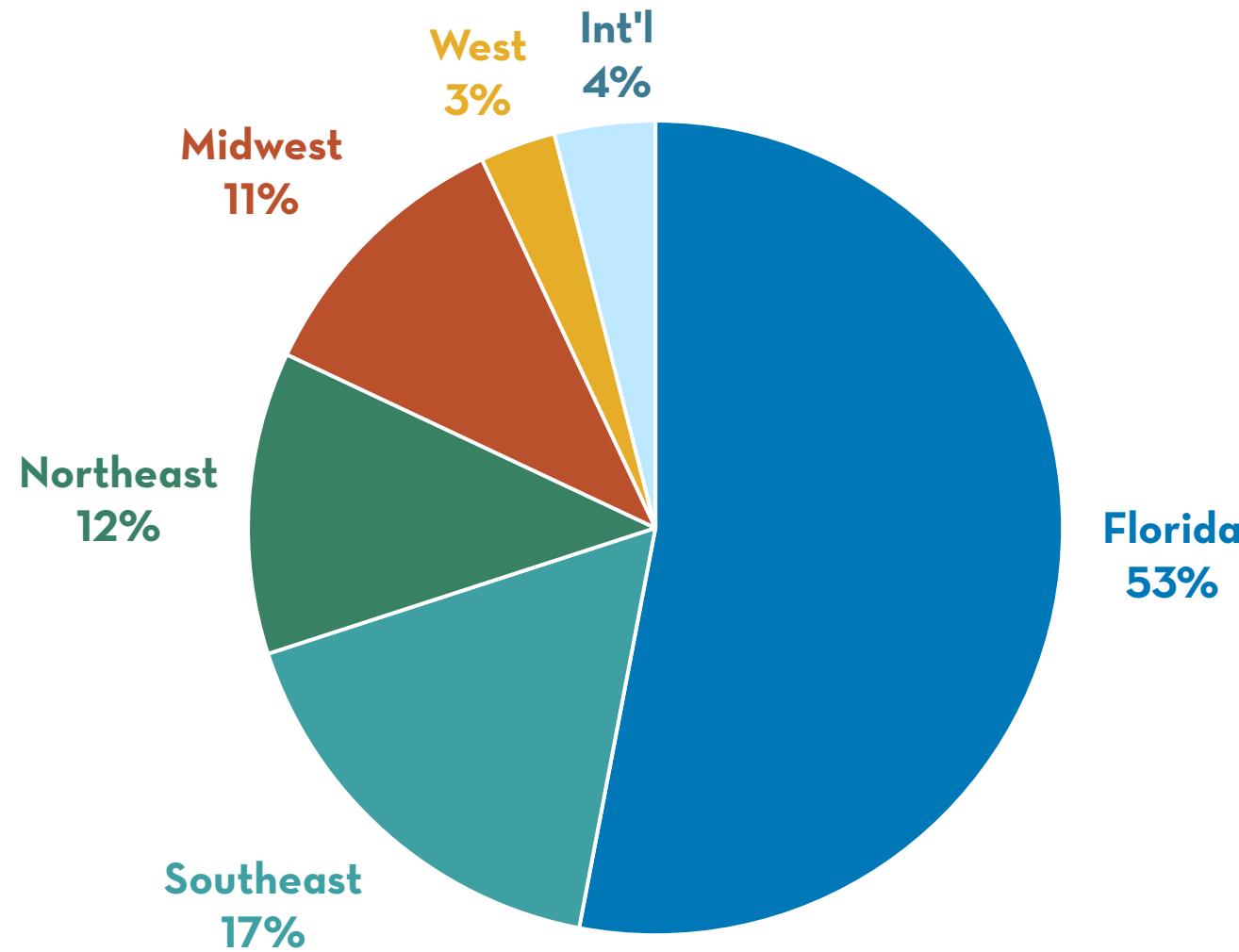


FY2025 NEW & RETURNING VISITORS

- » Around **2 in 5** visitors said this was their **first time** coming to the Ocala/Marion County area
- » Nearly **1 in 5** visited over 10 times



FY2025 REGION OF ORIGIN

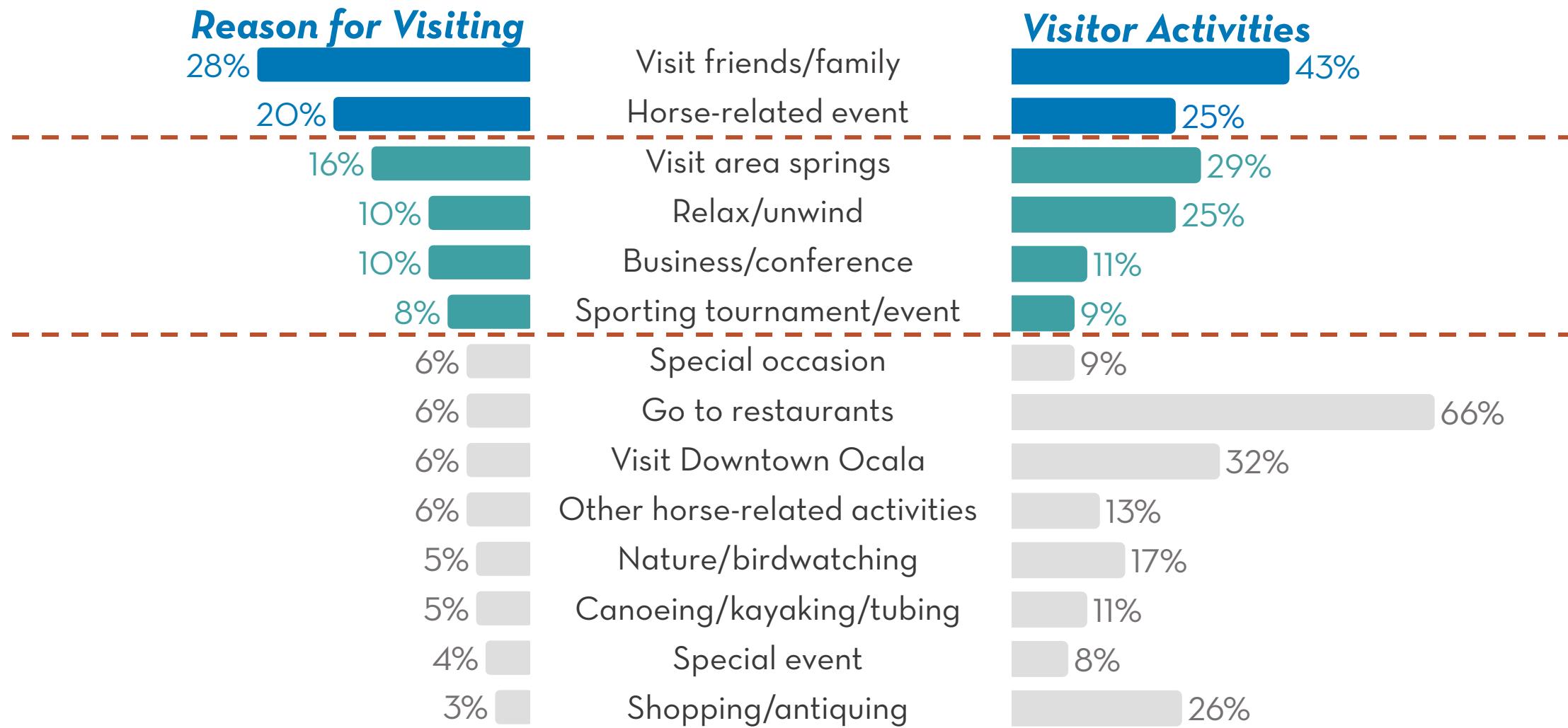


FY2025 TOP ORIGIN STATES

- » Over **8 in 10** visitors came to Ocala/Marion County from 13 states
- » **Florida, Georgia, and New York** remained key origin states for the Ocala/Marion County area

State	Percent
Florida	53%
Georgia	5%
New York	4%
Ohio	3%
North Carolina	2%
Illinois	2%
Michigan	2%
New Jersey	2%
Pennsylvania	2%
Tennessee	2%
Texas	2%
Virginia	2%
Maryland	2%

FY2025 ACTIVITIES VS. REASON FOR VISIT*



FY2025 QUADRANT ANALYSIS



FY2025 QUARTERLY DIFFERENCES

Oct - Sep 2024

Pre-Visit

- Visitors planned their trip 57 days in advance
- 26% recalled Ocala/Marion County promotions

Travel Party Profile

- Average Travel Party size: 2.7
- Region of origin:
Florida: 61%
Southeast: 14%

Trip Experience

- First-time visitors: 36%
- Nights spent in Ocala: 3.8
- Spending per travel party: \$1,214

Post Trip Evaluation

- Visit Met + Exceed Expectations: 99%
- Will return to Marion County: 95%
- Will recommend Marion County: 94%

Jan - Mar 2025

Pre-Visit

- Visitors planned their trip 62 days in advance
- 28% recalled Ocala/Marion County promotions

Travel Party Profile

- Average Travel Party size: 2.9
- Region of origin:
Florida: 47%
Southeast: 15%

Trip Experience

- First-time visitors: 40%
- Nights spent in Ocala: 4.8
- Spending per travel party: \$1,608

Post Trip Evaluation

- Visit Met + Exceed Expectations: 99%
- Will return to Marion County: 94%
- Will recommend Marion County: 90%

Apr - Jun 2025

Pre-Visit

- Visitors planned their trip 73 days in advance
- 33% recalled Ocala/Marion County promotions

Travel Party Profile

- Average Travel Party size: 2.8
- Region of origin:
Florida: 48%
Southeast: 22%

Trip Experience

- First-time visitors: 36%
- Nights spent in Ocala: 3.7
- Spending per travel party: \$1,160

Post Trip Evaluation

- Visit Met + Exceed Expectations: 99%
- Will return to Marion County: 95%
- Will recommend Marion County: 92%

Jul - Sep 2025

Pre-Visit

- Visitors planned their trip 54 days in advance
- 32% recalled Ocala/Marion County promotions

Travel Party Profile

- Average Travel Party size: 2.8
- Region of origin:
Florida: 56%
Northeast: 17%

Trip Experience

- First-time visitors: 35%
- Nights spent in Ocala: 4.0
- Spending per travel party: \$1,264

Post Trip Evaluation

- Visit Met + Exceed Expectations: 100%
- Will return to Marion County: 94%
- Will recommend Marion County: 88%

NATIONAL TOURISM TRENDS



FY2026 National Trends

Trend

Many 2026 trend reports point to travel as more intentional and purpose-led (“why” first), with travelers prioritizing experience and meaning. (Hilton/Expedia)

Interest in rural/farm travel has increased (Expedia) 84% of travelers interested in staying on or near a farm

FIFA World Cup 2026 is widely expected to generate major inbound and domestic travel, with demand concentrated around match cities and travel corridors. (Reuters)

Relation to Ocala/Marion County

Travelers want trips that feel personal and meaningful, and they choose destinations that match their values and the version of themselves they want to project.

Ocala boasts a large rural and equestrian industry; there is an opportunity in 2026 to lean into this trend with their potential visitors

Ocala is situated between two Fifa World Cup host cities in Atlanta and Miami, If there are fans road tripping between destinations, Ocala has an opportunity to welcome and market towards visitors along the way

FY2026 National Trends

Trend

Travelers are showing increased interest in offline/outdoor time, with strong demand for national/state parks (+35%) and nature-based experiences. (Airbnb)



Relation to Ocala/Marion County

Ocala National Forest is one of three in Florida, with limited competition and a central location, the national forest could be a great asset to Ocala.

Travelers age 50+ remain highly travel-motivated, often emphasizing bucket-list goals, comfort, and planning certainty. (AARP) and compared with the typical traveler, 50+ audiences are more sensitive to booking friction and value clear service/support cues. (AARP; PhocusWire)



Ocala median visitor age is 50 years old. Marketing efforts, access and support for older generations should be continued with an emphasis on creating easy trip booking opportunities

METHODOLOGY



METHODOLOGY

Visitor Tracking Study

- » Interviews were completed in person and online with **2,891 visitors** at local hotels, attractions, and events between **October 1st, 2024 and September 31st, 2025**.



Economic Impact

- » Total economic impact of tourism on the Ocala/Marion County area is a function of direct spending by visitors to Marion County, as well as the indirect and induced effects of this spending, such as increased business and household spending generated by tourism dollars.

Multiplier

- » Downs & St. Germain Research uses IMPLAN economic modeling to calculate the multiplier based on direct expenditure data collected from visitors to the Ocala/Marion County area. Agencies such as FEMA, EPA, Federal Reserve Bank, and the Bureau of Land Management use IMPLAN modeling.

PARTNER AND EVENT INVOLVEMENT

Partner and Event Involvement

- » Winter Series at WEC
- » Ocala International Horse Show
- » Various WEC events over the course of the year
- » FLAGS Long Course Championships
- » Babe Ruth World Series
- » Cal Ripken Rookie World Series
- » WEC Summer Series
- » FHSAA State Meet
- » Various FAST events over the course of the year
- » Grandview Invitational
- » Live Oak International
- » Florida Huddle/Encounter
- » Rock the Country
- » Ocala Comicon
- » Outdoor Expo
- » KP Hole Park
- » Silver Springs State Park
- » HDG Hotels
- » Hampton Inn and Suites
- » Circle Square Cultural Center
- » MCA & Brick City Center for the Art
- » Santos Bike Shop
- » Ft. King National Historic Landmark
- » Downtown Ocala Square
- » Ocala Farmers Market

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FY2025

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