

# Ocala/Marion County VCB

Economic Impact Study &  
Visitor Tracking Report  
January-March 2026



# STUDY OBJECTIVES: VISITOR JOURNEY

## Pre-Visit

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

## Travel Party Profile

- Visitor origin
- Travel party
- Demographics
- Number of visits to the area

## Trip Experience

- Visitor Center
- Mode of transportation
- Length of stay
- Accommodations
- Visiting other areas
- Visitor activities
- Visitor activities ratings
- Activities vs. reasons for visiting
- Visitor spending

## Post Trip Evaluation

- Trip experience
- Intention to recommend
- Likelihood of returning

## Economic Impact on Destination

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

# METHODOLOGY



## Data Collection:

From January 1, 2026, to March 31, 2026, **485** visitors were interviewed in person at various locations, including downtown, hotels, the state park, special events, and via online survey campaigns.

## Economic Impact:

Economic impact figures are based on all visitor types, including those staying in paid accommodations, unpaid accommodations, and day trippers.

*Note: The sampling error for a sample size of 485 is  $\pm 4.45\%$  points, given a 95% confidence level. That is, we are very certain (95%) that the results in our Visitor Profile Study are within 4.45% points of the “true” value on a quarterly basis.*

# ECONOMIC IMPACT SUMMARY



# KEY PERFORMANCE INDICATORS\*

Jan - Mar 2026 is marked by an increase in visitation from both visitors staying in paid accommodations and day trippers and their spending habits while simultaneously seeing a decrease in visitors in unpaid accommodations and their spending habits. This offset is marked by a decrease in length of stay and travel party size. However, the increase in room nights can be directly linked to a 10.6% increase in rental units

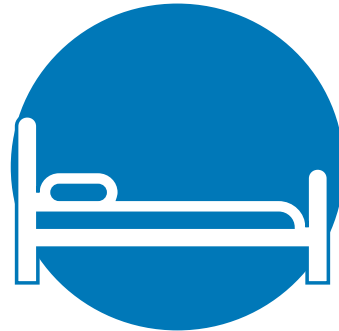


362,700

**Total  
Visitors**

**YoY Change:**

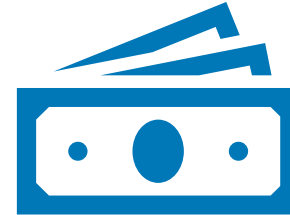
↑ 4.3%



350,700

**Room  
Nights**

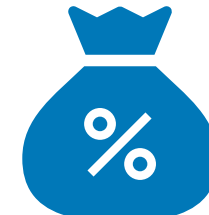
↑ 5.5%



\$180,244,600

**Direct  
Spending\*\***

↓ 7.5%



\$1,765,600

**Tourism  
Development Tax**

↓ 2.6%

\*Sources: Smith Travel Research, Key Data, and DSG Visitor Tracking Study

\*\*Visitation and spending estimates are preliminary. Adjustments may be made at the end of the year to account for quarterly fluctuations.

# LODGING METRICS\*

Units		
Time frame	Hotels	Vacation Rentals
Jan - Mar 2026	5,395	615
Jan - Mar 2025	5056	377

## COMBINED



64.8%

**Occupancy**

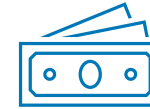
↓ 4.6%



\$148.18

**Average Daily Rate**

↓ 2.1%



\$96.07

**Revenue Per Available Room**

↓ 6.7%

## HOTELS\*\*



66.1%

**Occupancy**

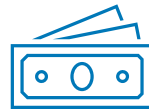
↓ 4.2%



\$137.21

**Average Daily Rate**

↓ 4.8%



\$90.75

**Revenue Per Available Room**

↓ 8.9%

## VACATION RENTALS\*\*\*



53.3%

**Occupancy**

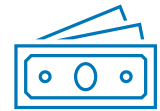
↑ 1.5%



\$244.46

**Average Daily Rate**

↓ 2.8%



\$130.34

**Revenue Per Available Room**

↓ 1.3%

\*Key Data and Smith Travel Research recently went through historical reporting updates that impacted previously reported figures. These have been updated resulting in historic updates to Jan-Mar 2026 data in order to maintain an apples-to-apples comparison.

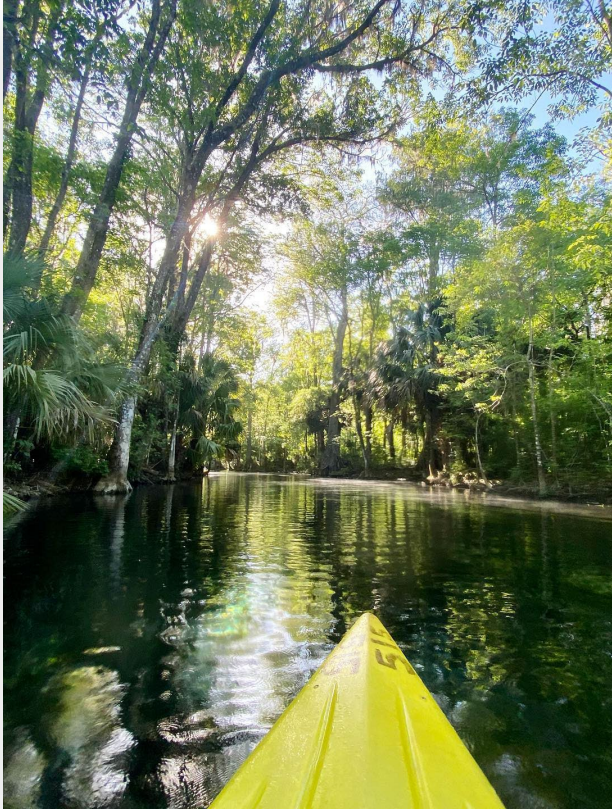
\*\*Hotel source: Smith Travel Research

\*\*\*Vacation rental source: Key Data

# VISITOR PROFILE SUMMARY



# VISITOR PROFILE



**47**

Median Age

**49%**

First-time Visitor

**\$114,700**

Median Household Income

**43%**

Traveled with Children

**2.7**

Travel Party Size

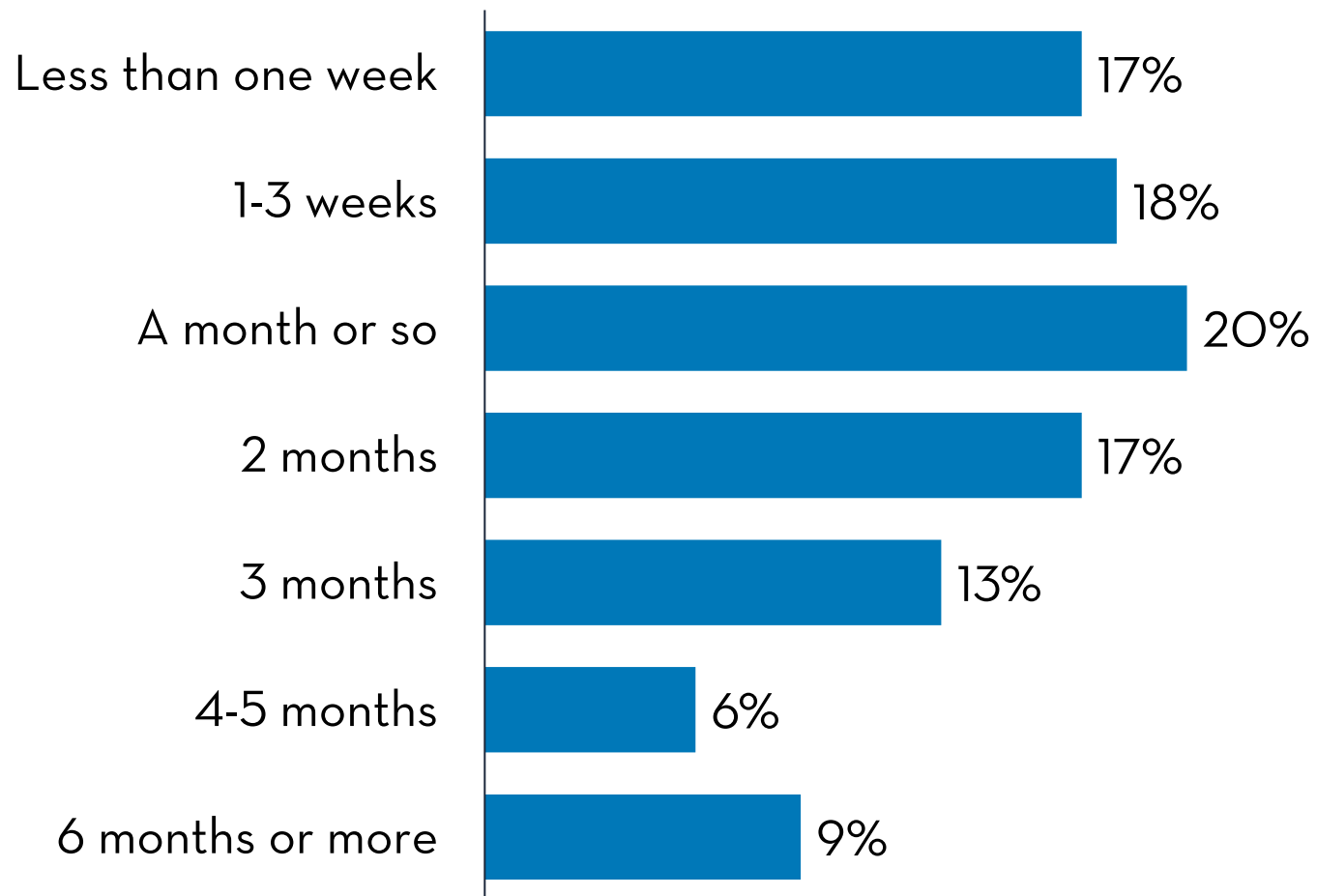
**4.1**

Length of Stay

# TRIP PLANNING CYCLE

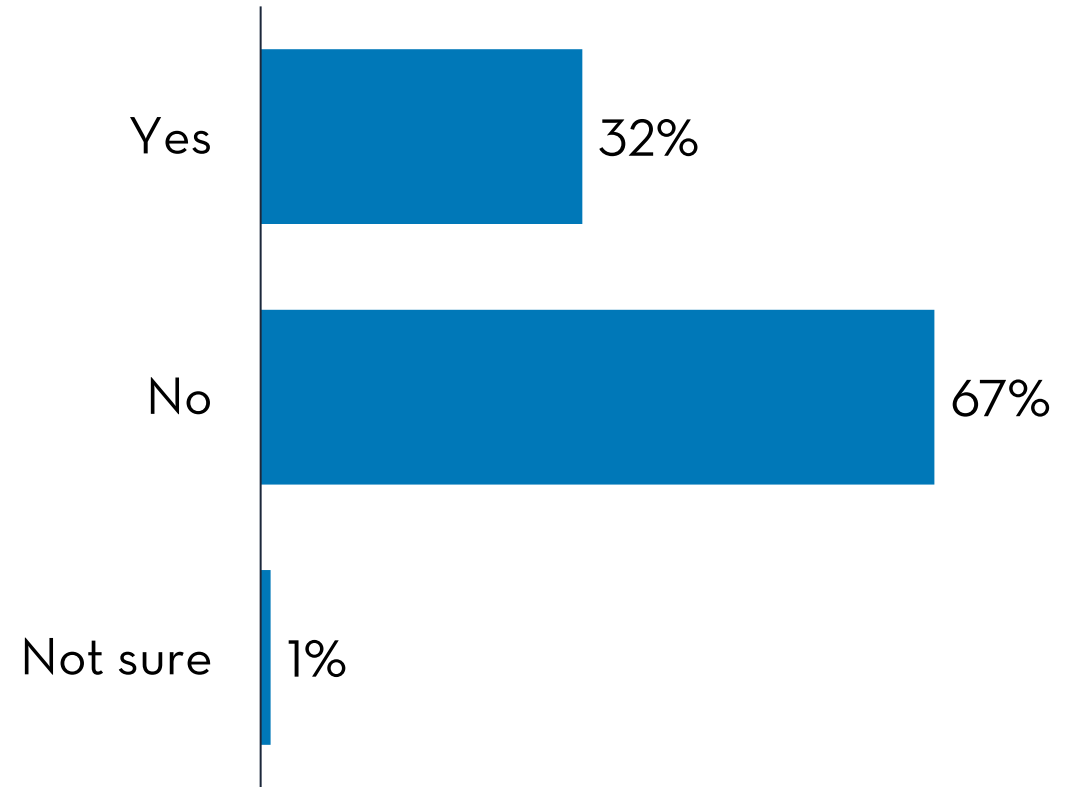
## How far in advance did you plan this trip to Ocala?

- **Insight: 55%** of visitors planned their trip **within one month** or less
- **Insight:** Short-term planning is trending upward
- **Insight:** Planning cycles continue to shorten, the typical planning window is now **55 days**, as visitors decide closer to travel dates



# RECALL OF ADVERTISING\*

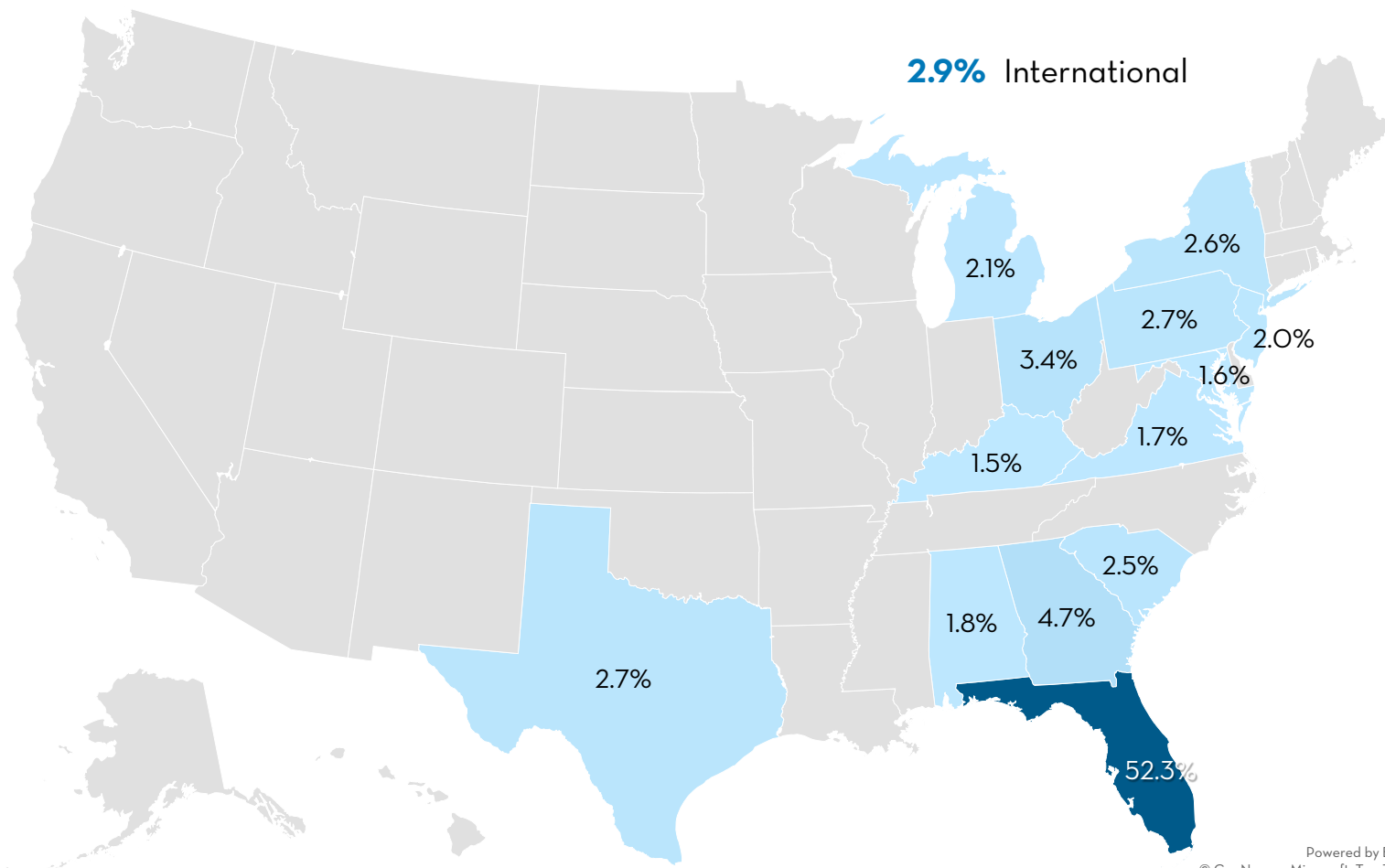
- **Insight:** 32% of visitors recalled advertising of the destination, **up 4%** from Jan-Mar 2025
- **Insight:** Of those who recalled advertising, **3 in 4** said it influenced their decision to visit



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

# VISITOR ORIGINS\*

## Top Origin States & International Market



Top Origin Markets*	Percent
<b>Orlando-Daytona Beach-Melbourne</b>	14.7%
<b>Jacksonville</b>	9.4%
<b>Tampa-St. Petersburg</b>	8.6%
<b>Gainesville</b>	5.8%
<b>West Palm Beach-Ft. Pierce</b>	5.2%
Miami-Fort Lauderdale	3.1%
Philadelphia	2.4%
Atlanta	2.1%
Mobile	2.1%
New York City**	2.0%

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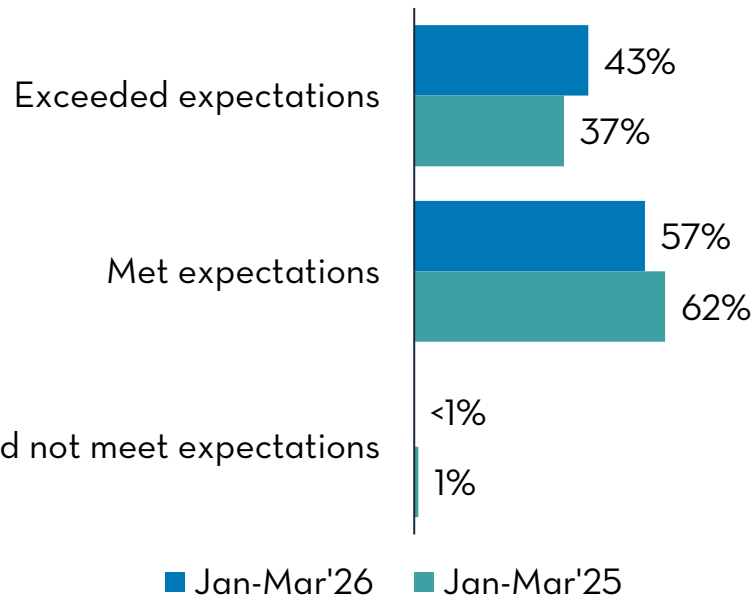
\*Sources: DSG Visitor Tracking Study

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

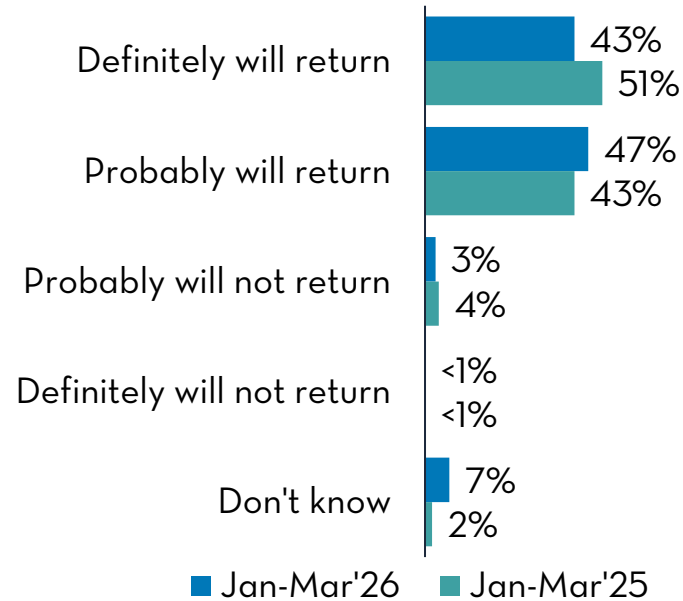
# EXPECTATIONS, INTENTION TO RETURN\* & RECOMMEND

- **Insight:** All visitors reported that their expectations were **met or exceeded**, with **43%** saying they were **exceeded** (+6% points YoY)
- **Insight:** Recommendation intent dropped **12%** points to **78%**, while the number of those who weren't sure increased to **19%**

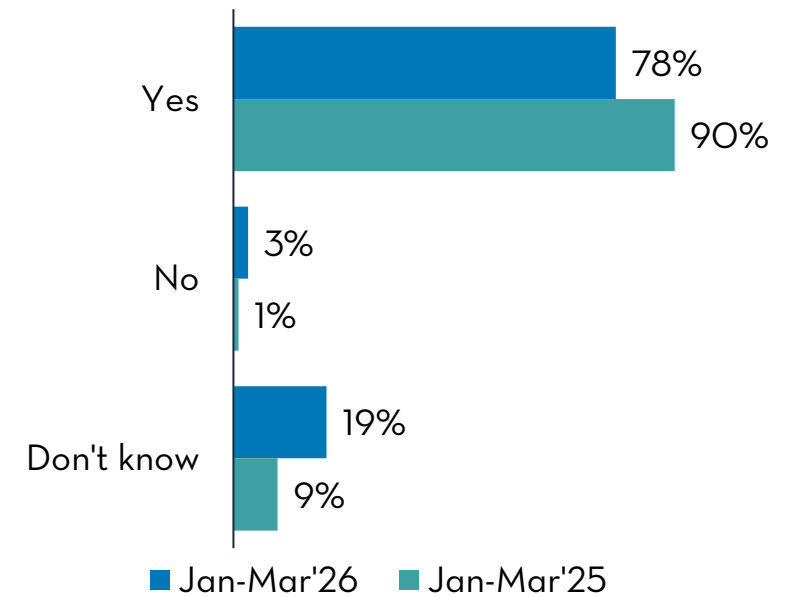
## TRIP EXPERIENCE EXPECTATIONS



## LIKELIHOOD TO RETURN\*

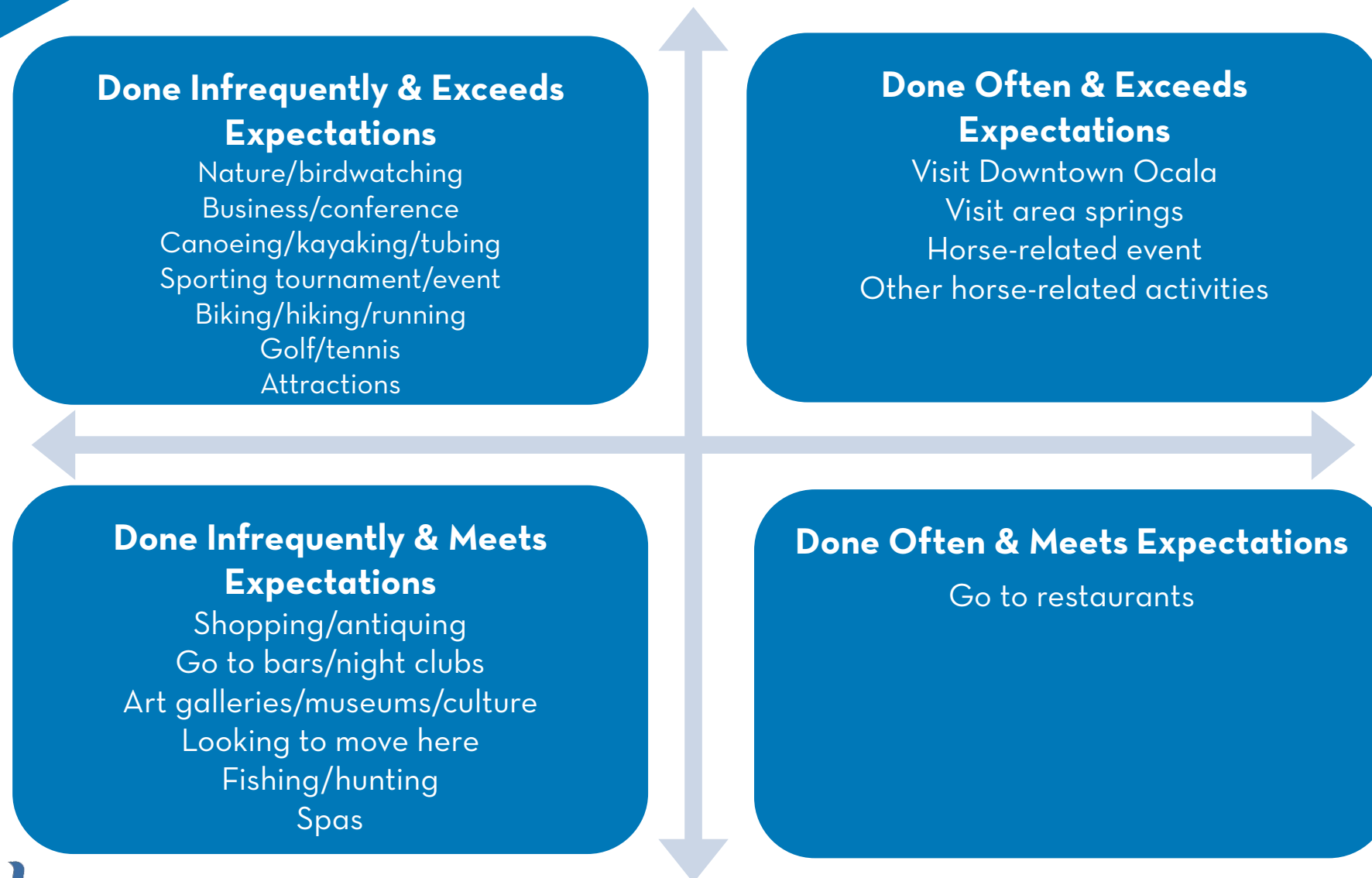


## LIKELIHOOD TO RECOMMEND



\*Main reasons for not returning included a preference for visiting a variety of destinations and the event/occasion having concluded.

# QUADRANT ANALYSIS



# VISITOR PROFILE INSIGHTS

## Insights

## Actionable Items

**49% of visitors are first-time** (up **9%** points YoY)

**The destination is reaching a growing share of new visitors.** This may reflect growing visibility and interest from new audiences

**Planning window remains short** (i.e., **55** days, down from 62 YoY)

**Shorter planning cycles continue to shape visitor behavior.** Visitors appear to be planning closer to arrival and maintaining more flexibility in their travel decisions.

**Ad recall rose to 32%** (up from 28% YoY)

**The increase signals that recent marketing investments may be gaining traction.** Among those who recalled ads, social media (31%) and print (29%) are driving the most awareness

**Intention to recommend dropped 12%** points to 78%

**While 100% of visitors met or exceeded expectations,** the 19% “don’t know” response suggests a softer, undecided segment rather than active dissatisfaction, a pattern common among destinations with growing first-time visitor shares

**72%** chose Ocala/Marion County as **sole destination** (up from 67% YoY)

**The 5% points increase suggests the area is increasingly viewed as a standalone,** trip-worthy destination rather than a stopover, a positive indicator of the area’s growing appeal and identity

# TOP REASONS FOR CHOOSING THE AREA\*



*“Ocala is a nice quiet place to visit almost country. It has a large Hispanic community and there are plenty of areas to go for nature walks and hikes.”*

*“It's a place where arts and culture meets nature along with opportunities to see historic Florida Heritage sites.”*

*“Always enjoy visiting Ocala; not crowded, pretty and rural.”*

*“Beautiful area of Florida; vibrant and growing.”*

*“We come here frequently to visit relatives; love the old Florida vibe and the equestrian scene. Looks to be growing a lot.”*

*“Been here many times to see family. Always enjoy this beautiful area of Central Florida with lots of trees and horses.”*

# DETAILED FINDINGS

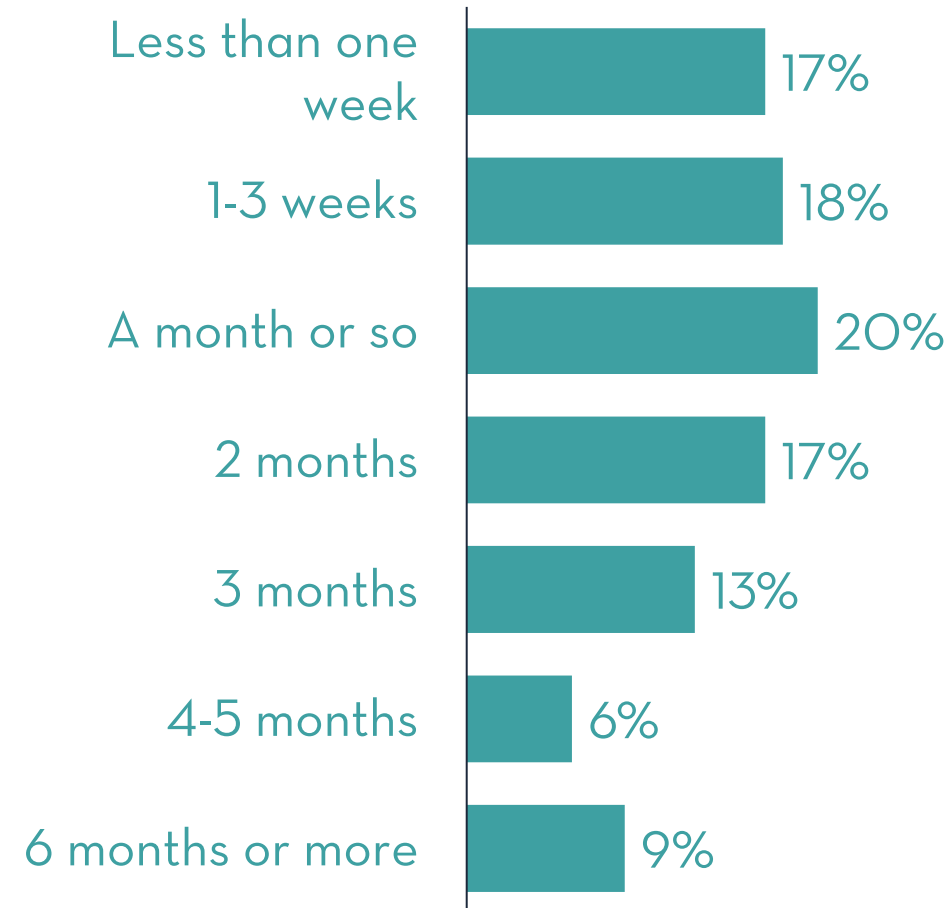


# VISITOR JOURNEY: PRE-VISIT



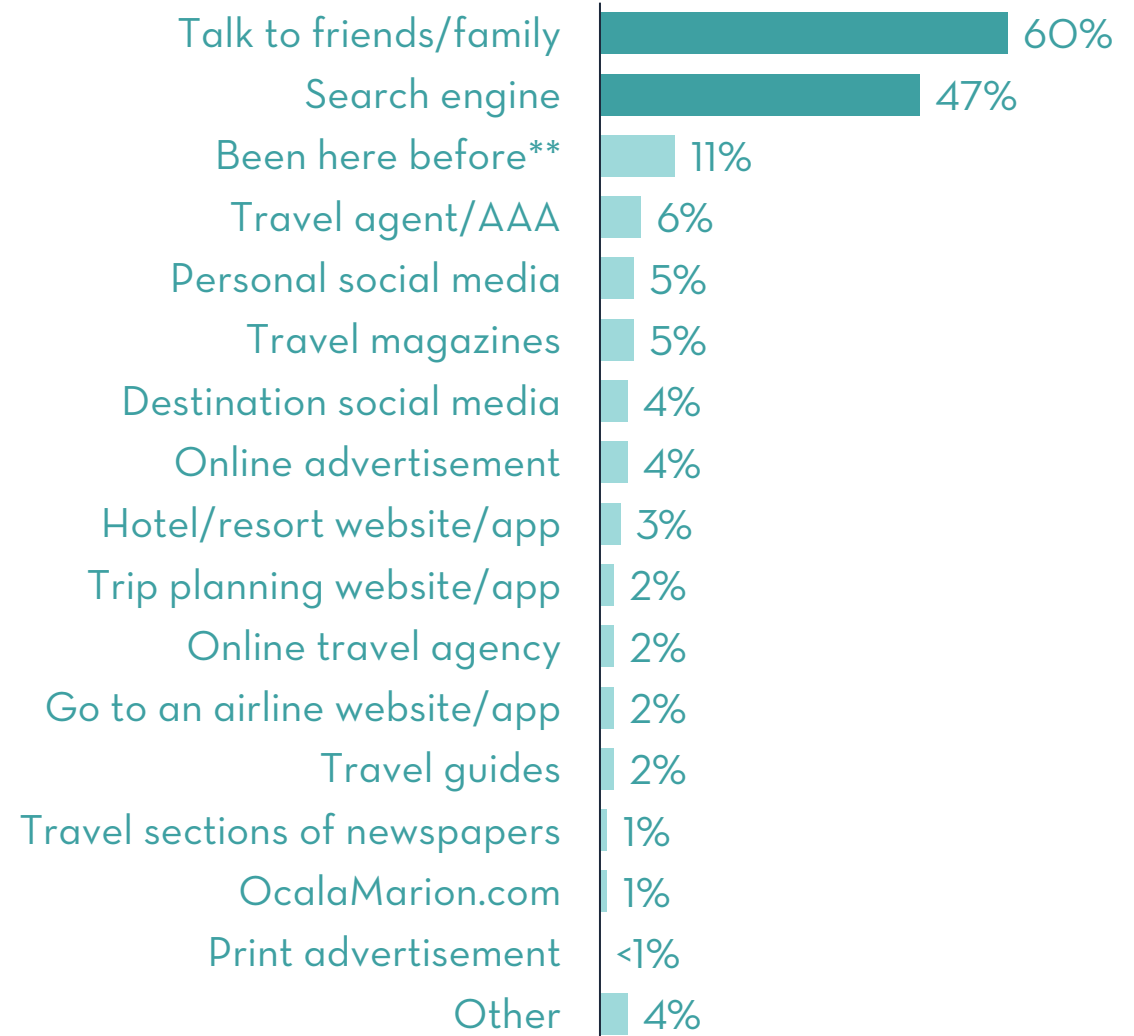
# TRIP PLANNING CYCLE

- **55%** of visitors planned their trip to the Ocala/Marion County area **a month or less** in advance
- **28%** of visitors planned their trips **3 or more months** in advance
- Visitors reported a shorter **planning window** this quarter (**55 days**), with the typical planning cycle decreasing compared to the previous year. This suggests a continued shift toward shorter planning cycles, with visitors making trip decisions closer to their travel dates



# TRIP PLANNING SOURCES\*

- **Word of mouth** leads all planning sources, with **60%** consulting friends or family
- **Search engines** are the second most-used resource at **47%**
- **11%** relied on their **prior experience** when planning their trip to Ocala



\*Multiple responses permitted.

\*\*Coded from Other open-ended responses.

# REASONS FOR VISITING\*

- **Horse-related events** are the top draw at **22%**, followed by **visiting friends/family** (**18%**) and **area springs** (**15%**)
- Combined, **30%** of visitors cited **horse-related events** and **other horse-related activities** as their reason for visiting

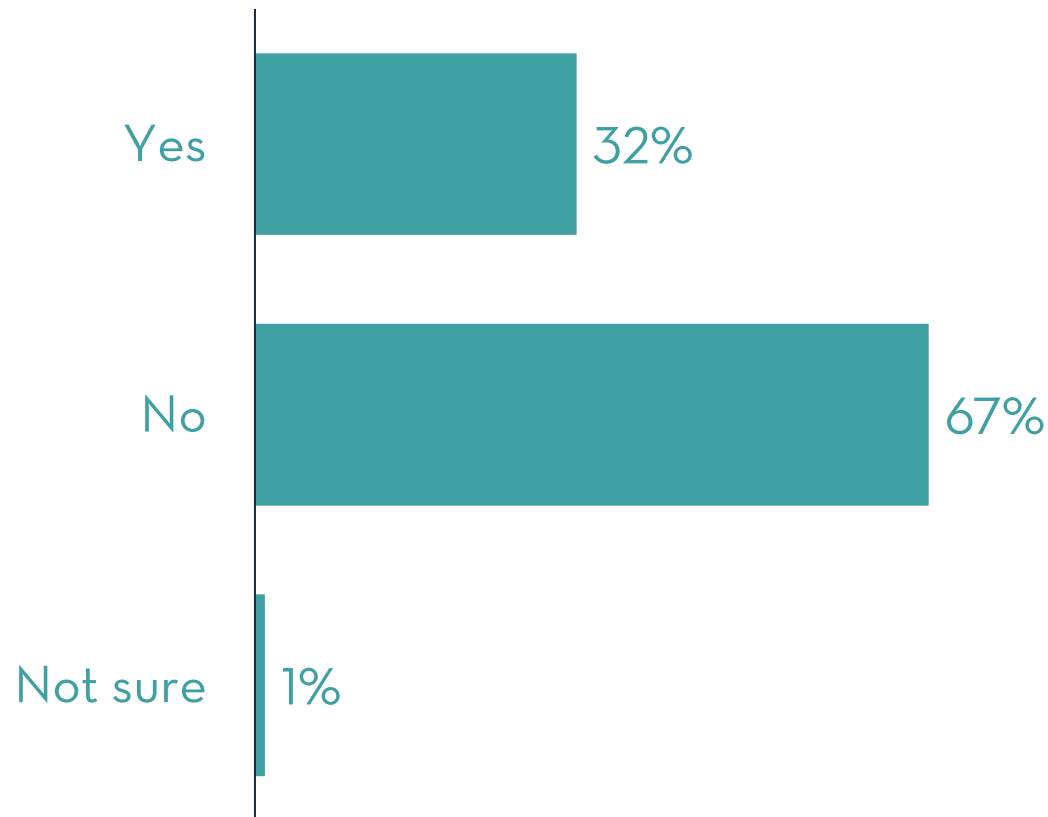


\*Up to three responses permitted.

\*\*The reported percentage may be influenced by the increased on-site interviewing presence at a local attraction.

# RECALL OF ADVERTISING\*

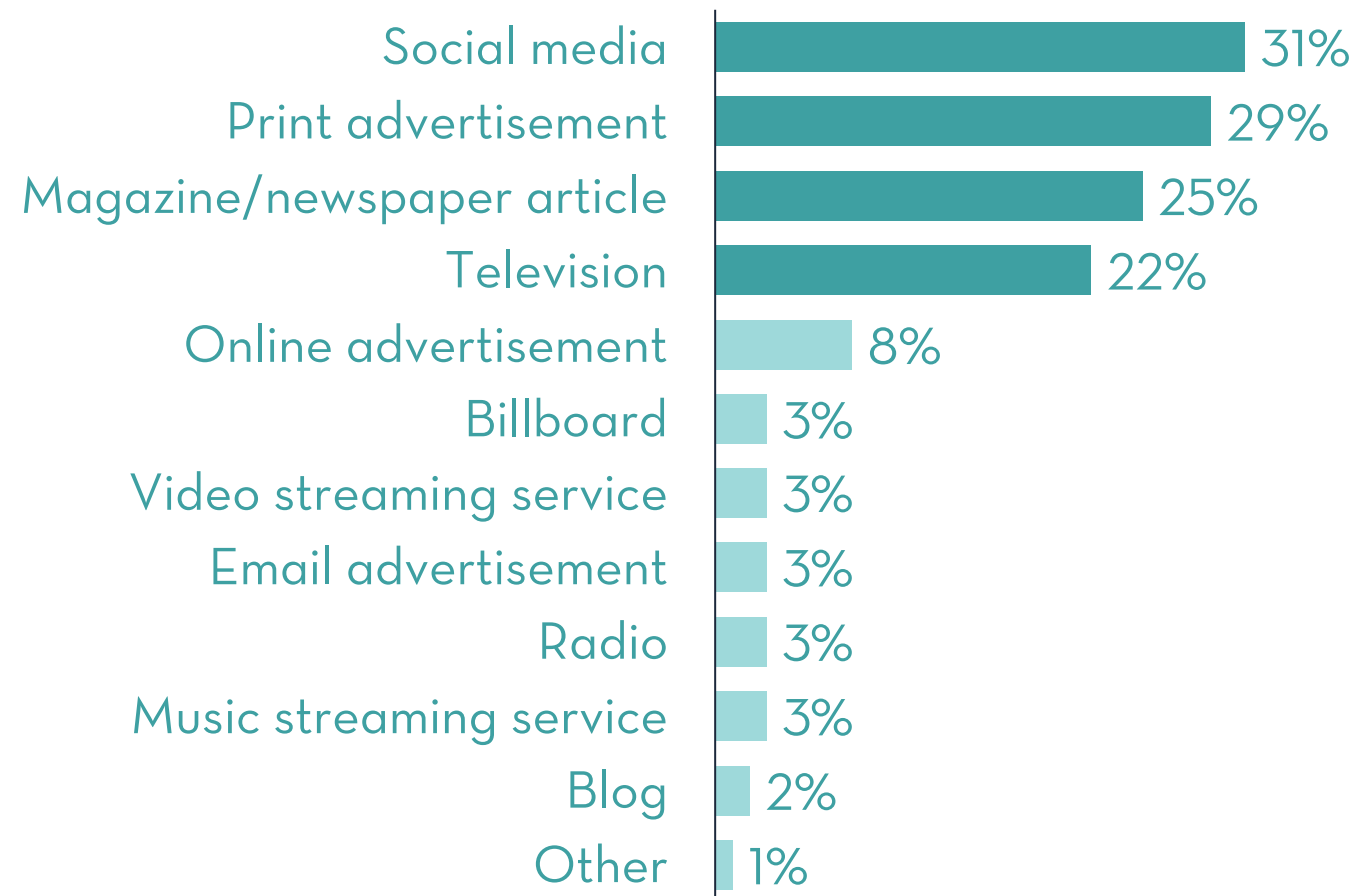
- **32%** of visitors recalled seeing advertising for the Ocala/Marion County area
- Whereas, **2 in 3 visitors** did not recall any advertising
- Among visitors who recalled advertising or promotion, **3 in 4** said it **influenced** their decision to come to the destination (**24%** of all visitors)



# ADVERTISING SOURCE\*

- **Social media** leads ad sources at **31%**, closely followed by **print** ads at **29%**
- Traditional media like **magazines** (**25%**) and **TV** (**22%**) still drive significant recall
- **Online advertisements** were recalled by **8%**, trailing traditional channels

Base: 32% of visitors who recalled advertising.

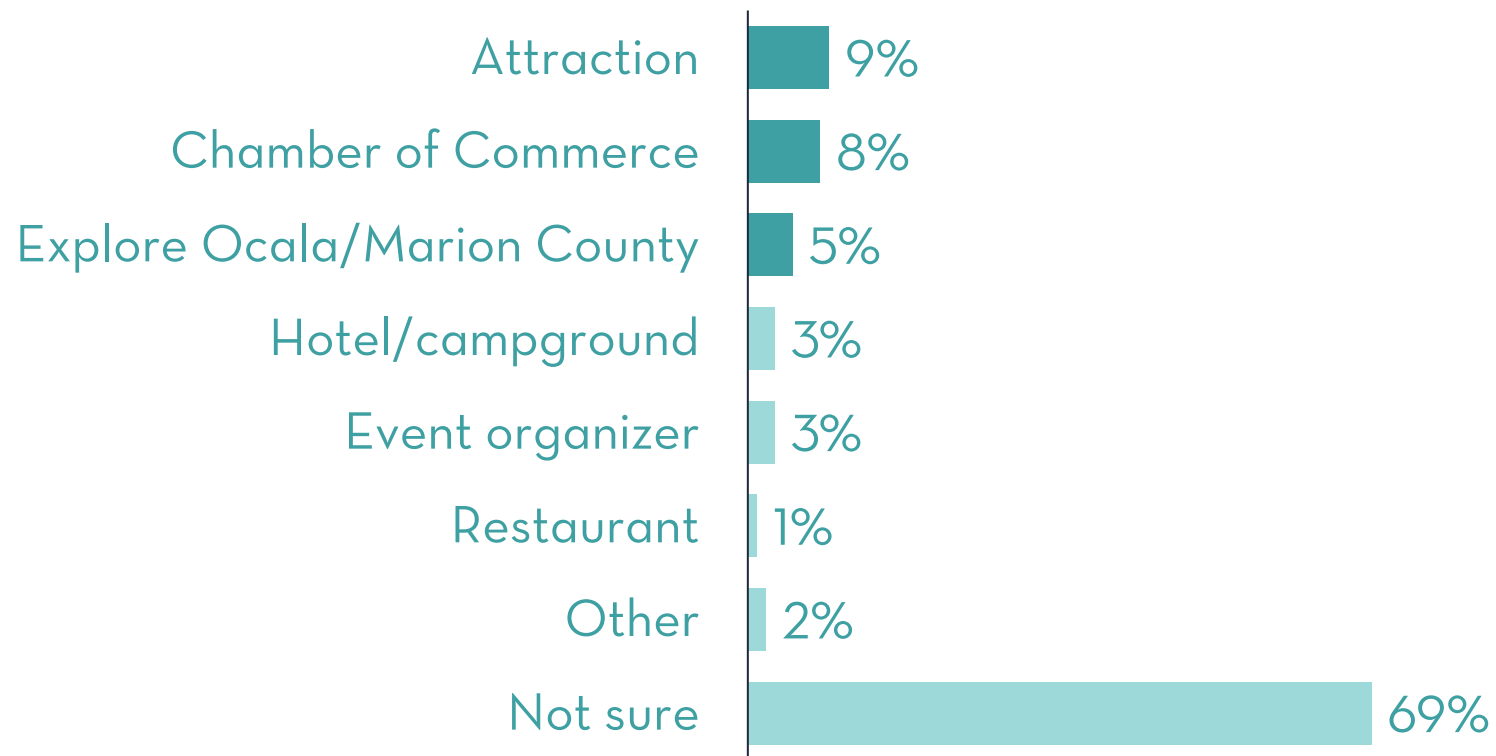


\*Multiple responses permitted. Advertising efforts mentioned on this slide include VCB's efforts and the efforts of other organizations.

# SPONSORED ADVERTISEMENT\*

Base: 32% of visitors who recalled advertising.

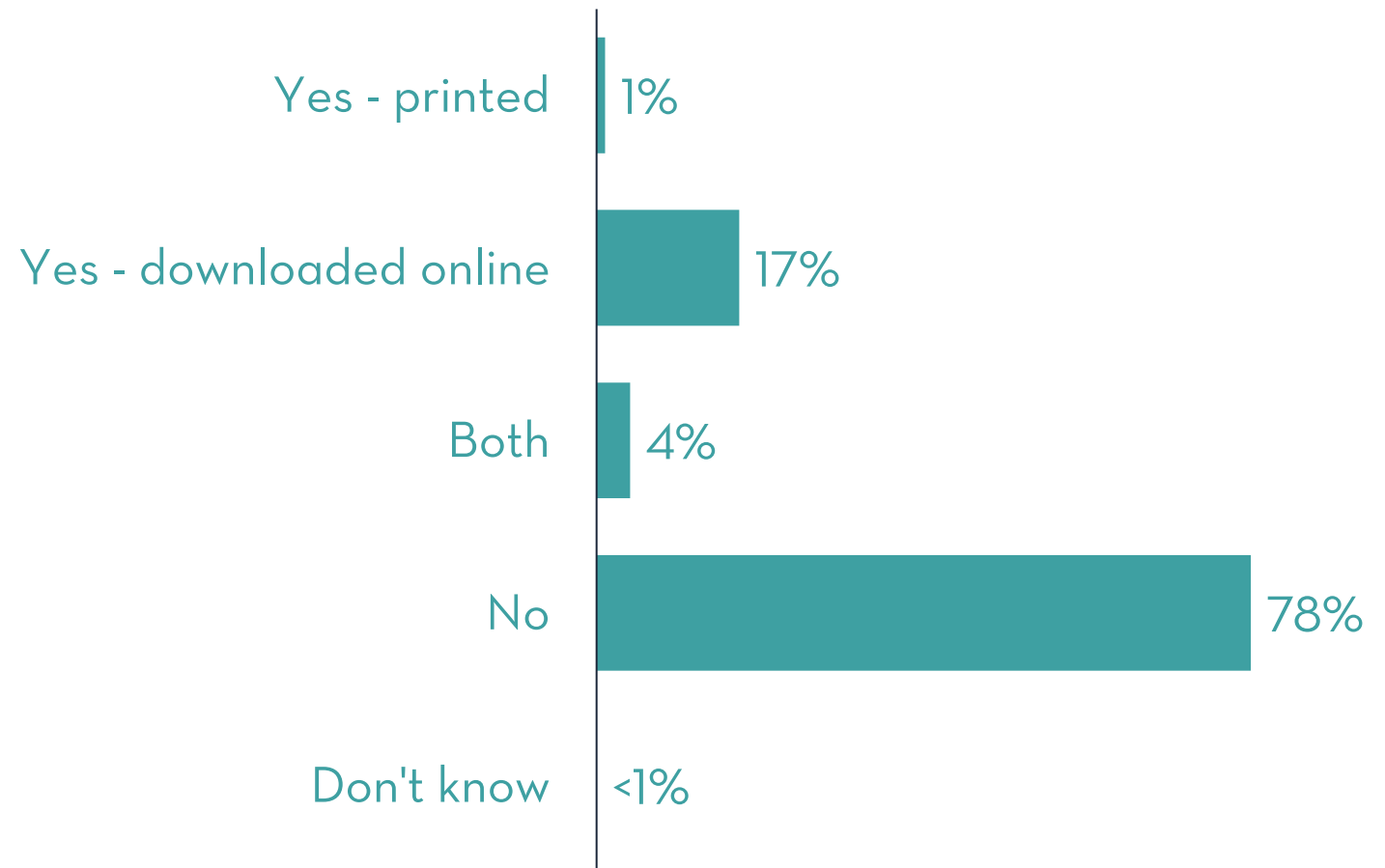
- **Attractions (9%)** and the **Chamber of Commerce (8%)** had the highest sponsor recognition
- **Explore Ocala/Marion County** was recognized by **5%** of visitors who reported seeing a destination ad



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

# VISITOR GUIDE\*

- **17%** downloaded the **guide online**, far outpacing the **printed** version
- **Digital distribution** is the clear preferred format for guide access
- Visitors **rated** the visitor guide's **usefulness** an average of **8.1** out of 10\*

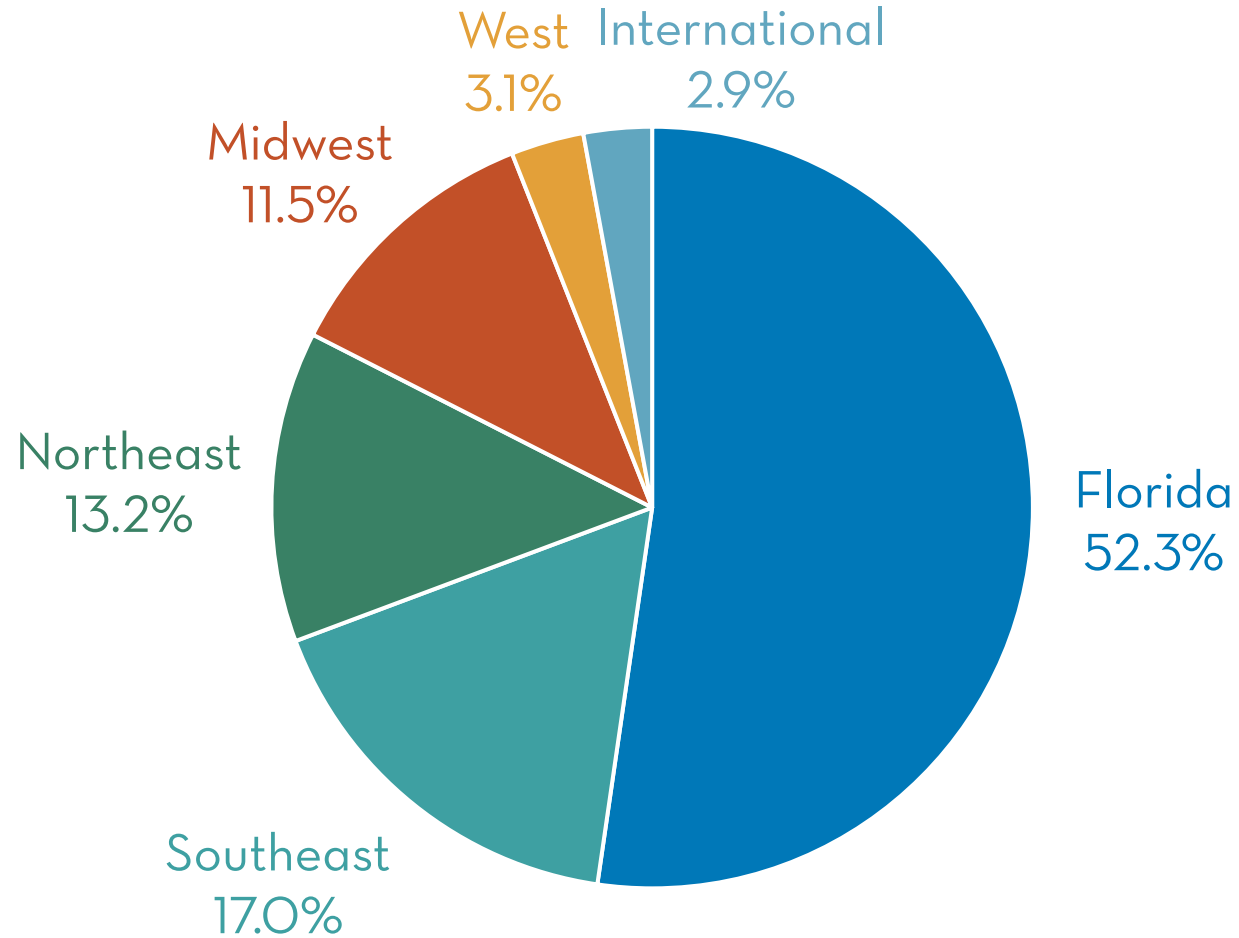


\*On a scale from 1 to 10 where 10 is extremely useful and 1 is not useful at all.

# VISITOR JOURNEY: TRAVEL PARTY PROFILE



# REGION OF ORIGIN



# TOP ORIGIN STATES

- Over **half** of all visitors (**52.3%**) are **Florida** residents
- **Georgia** is the next largest origin state at just **4.7%**, followed by **Ohio** at **3.4%**

State	Percent
<b>Florida</b>	<b>52.3%</b>
Georgia	4.7%
Ohio	3.4%
Pennsylvania	2.7%
Texas	2.7%
New York	2.6%
South Carolina	2.5%
Michigan	2.1%
New Jersey	2.0%
Alabama	1.8%
Virginia	1.7%
Maryland	1.6%
Kentucky	1.5%

# TOP ORIGIN MARKETS

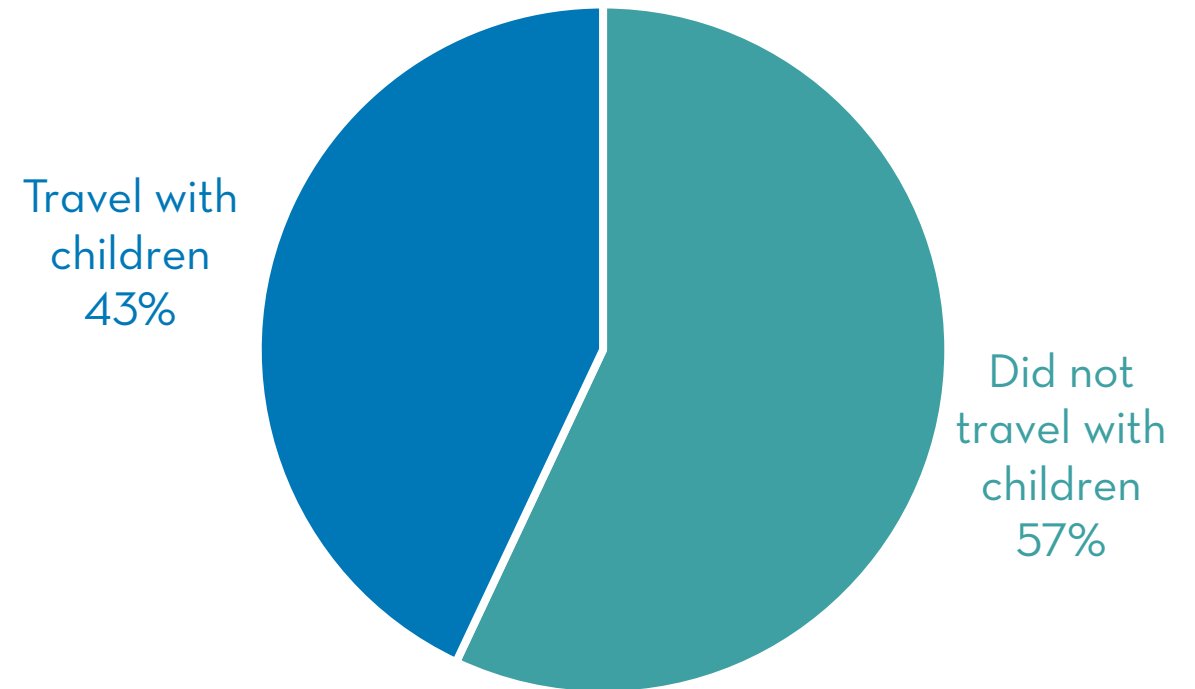
- **Top 3 origin markets** are all in-state **Florida** DMAs, combining for nearly a third (**32.7%**) of all visitors
- **Orlando-Daytona Beach-Melbourne** leads at **14.7%**, followed by **Jacksonville** (**9.4%**) and **Tampa-St. Petersburg** (**8.6%**)

Market	Percent
<b>Orlando-Daytona Beach-Melbourne</b>	<b>14.7%</b>
<b>Jacksonville</b>	<b>9.4%</b>
<b>Tampa-St. Petersburg</b>	<b>8.6%</b>
<b>Gainesville</b>	<b>5.8%</b>
<b>West Palm Beach-Ft. Pierce</b>	<b>5.2%</b>
Miami-Fort Lauderdale	3.1%
Philadelphia	2.4%
Atlanta	2.1%
Mobile	2.1%
New York City*	2.0%

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

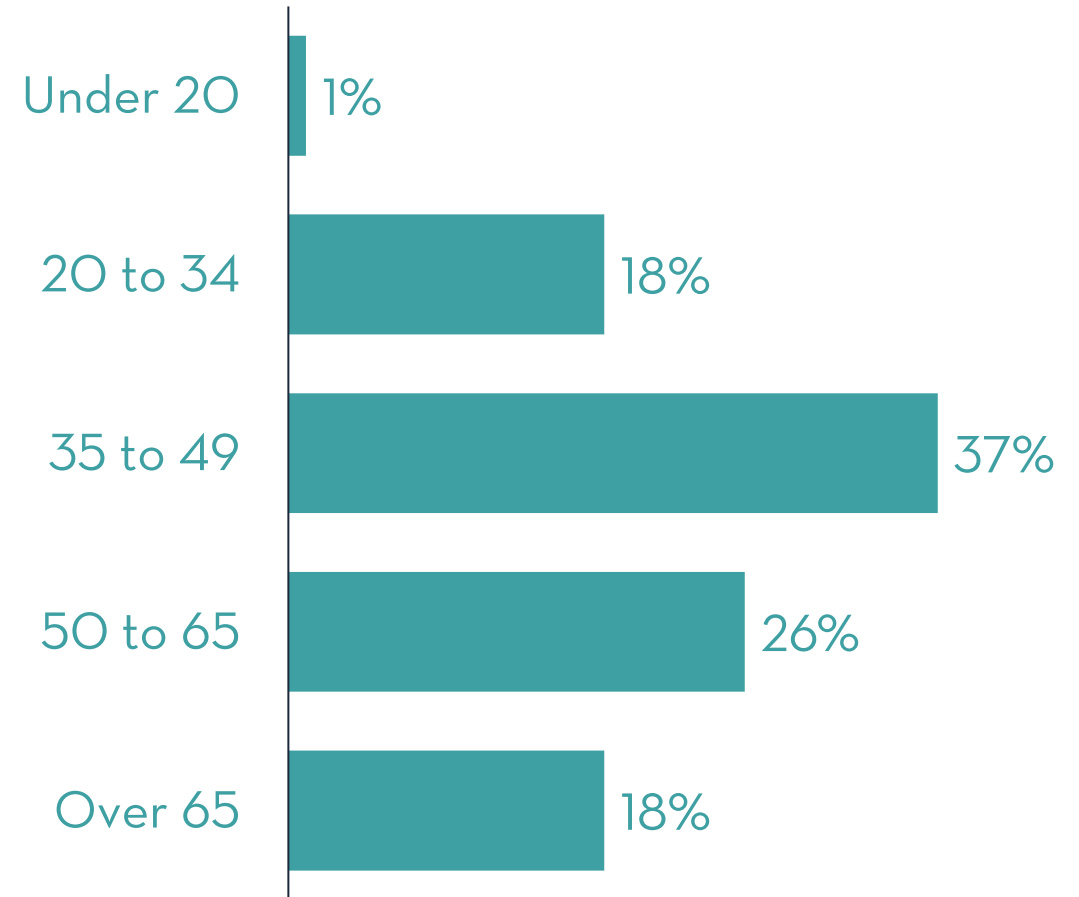
# TRAVEL PARTIES

- **43%** of travel parties included **children**, indicating strong family appeal
- **Average travel party size** is **2.7** people



# AGE\*

- The **35-49** age group is the largest segment at **37%**, and the **median visitor age** has shifted slightly **younger**, from 51 to **47**, compared to the previous year.

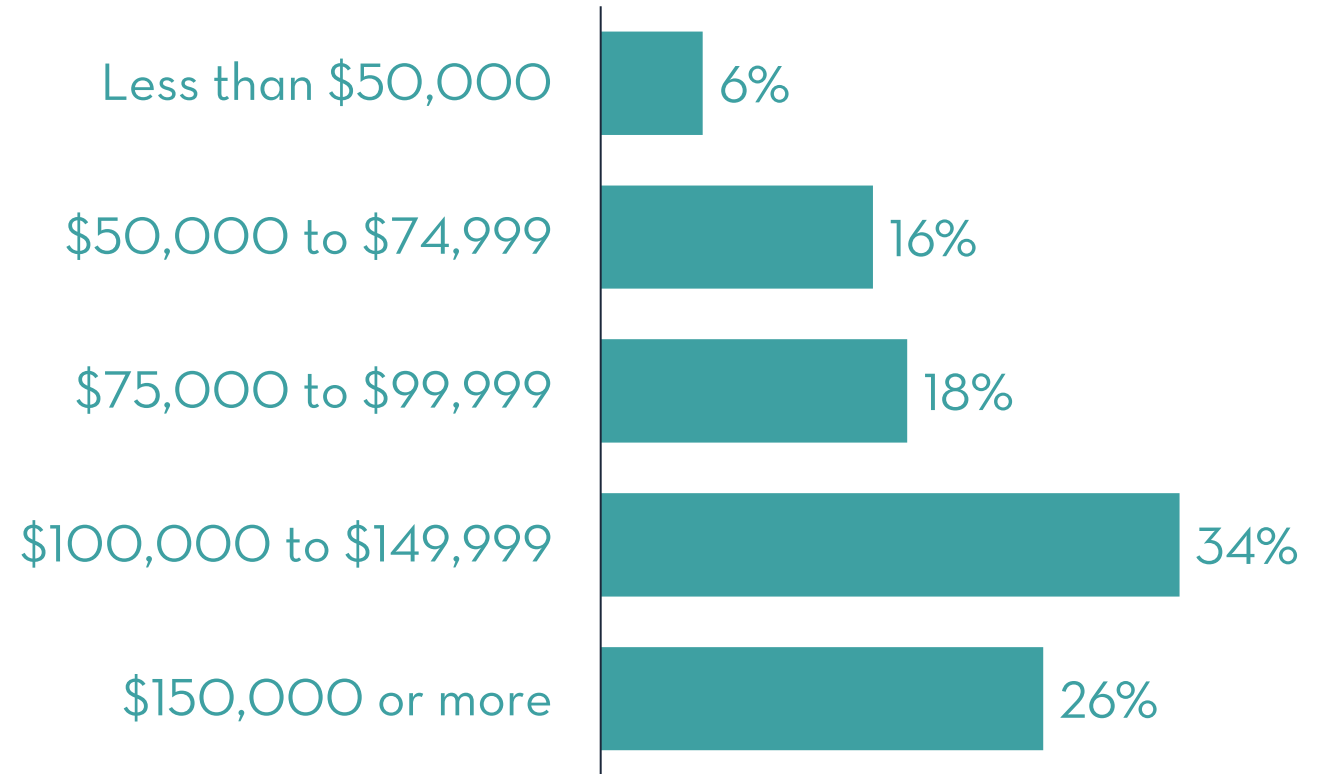


The demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.

\*Age of member of travel party surveyed.

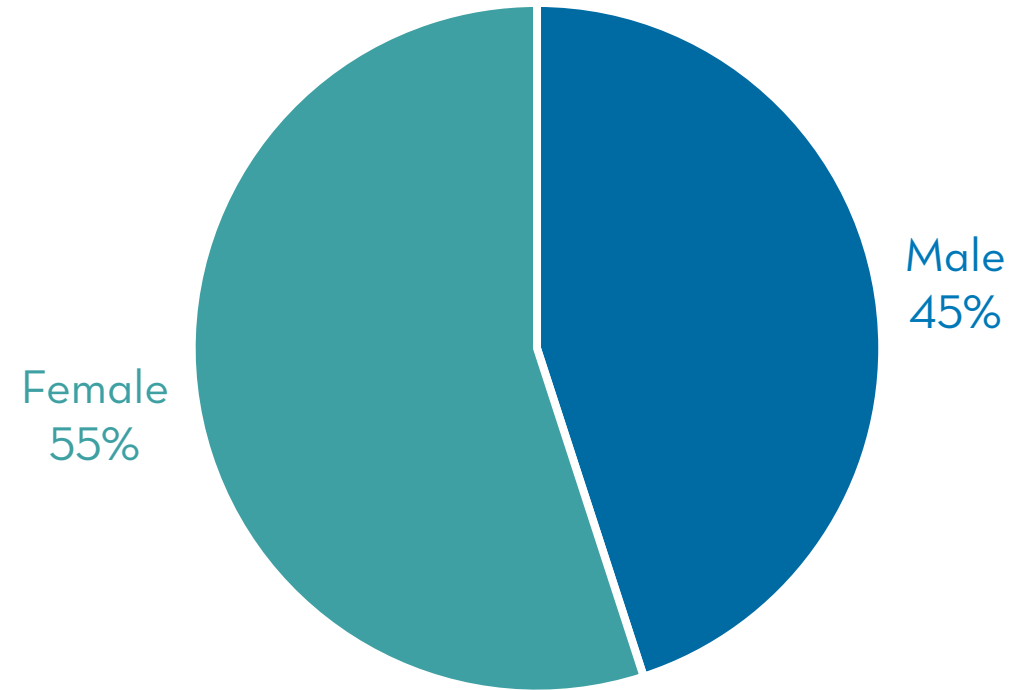
# INCOME

- Nearly **60%** of visitors report household incomes of **\$100,000 or more**
- **Median household income** is **\$114,700**



# GENDER\*

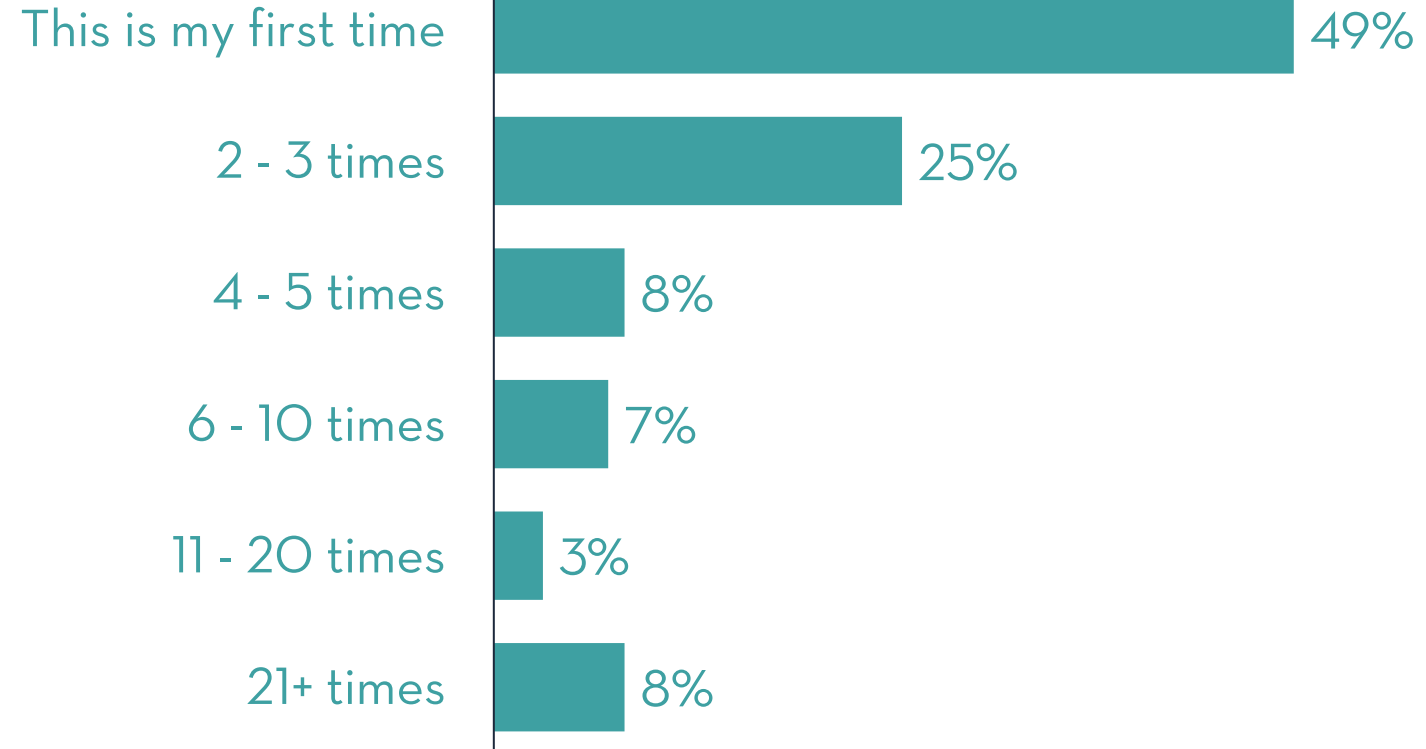
- **55%** of visitors interviewed were **female**



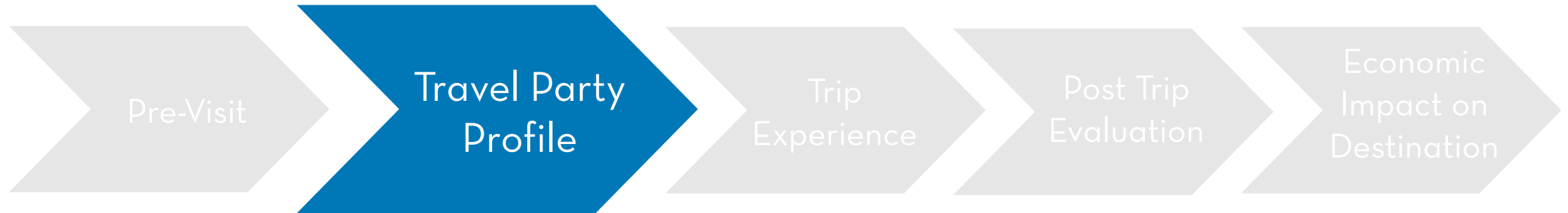
\*Gender of member of travel party surveyed. The demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.

# NEW & RETURNING VISITORS

- **Nearly half (49%)** are **first-time** visitors to Ocala/Marion County
- **51%** have visited **2 times or more**, showing strong loyalty

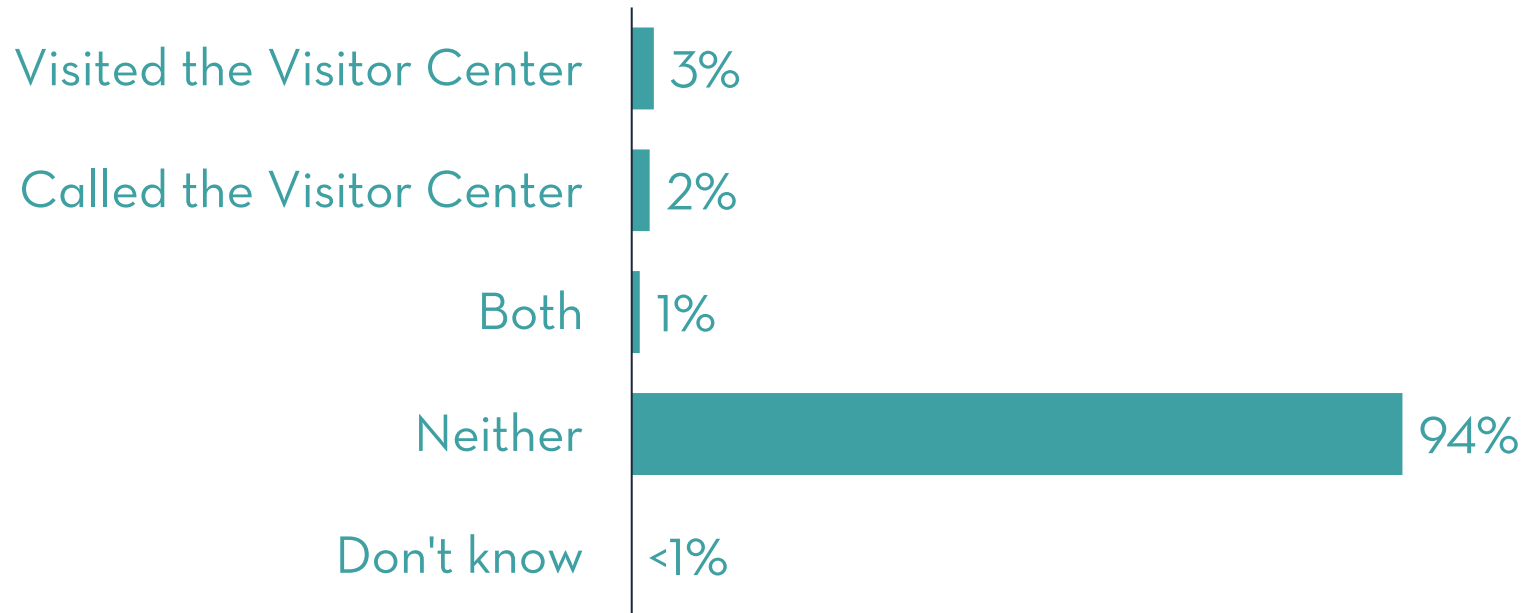


# VISITOR JOURNEY: TRAVEL PARTY PROFILE



# VISITOR CENTER\*

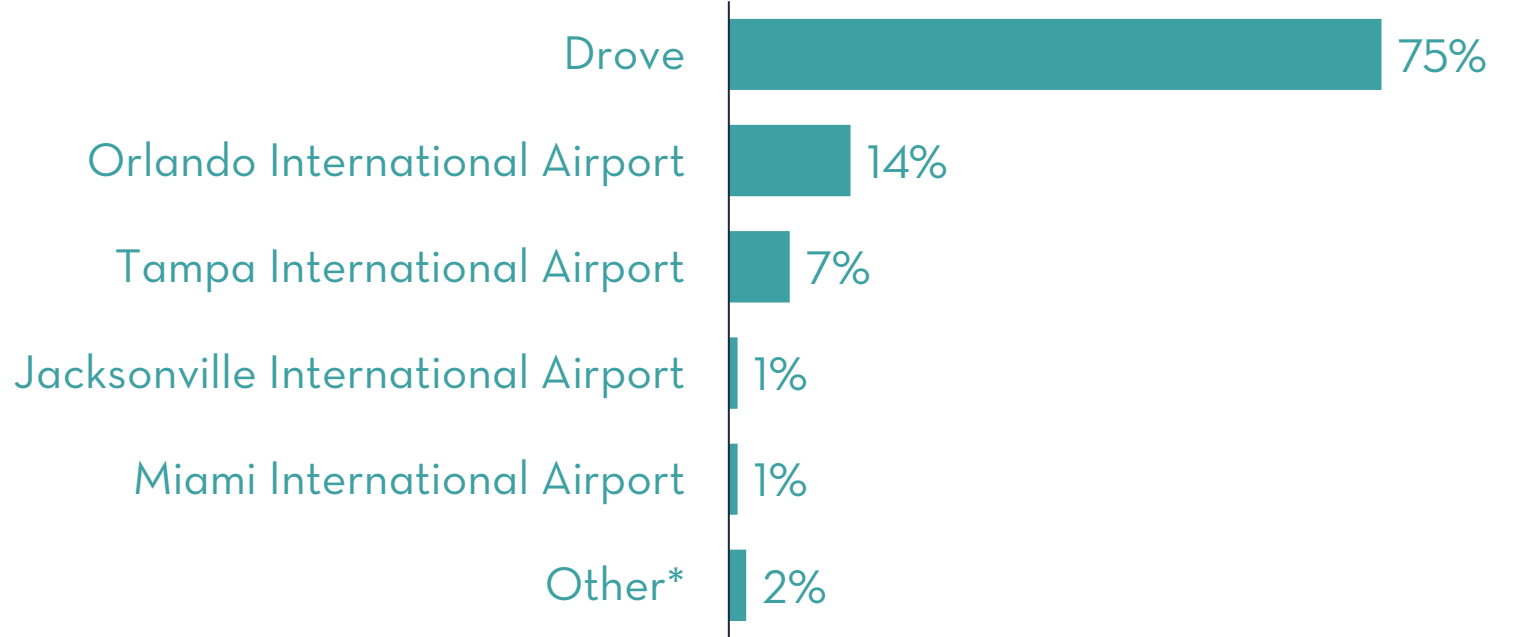
- About **6%** of visitors engaged with the **Visitor Center** (visited, called, or both)
- Those who used the visitor center services **rated** their **experience** at **8.2** out of 10\*



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

# TRANSPORTATION

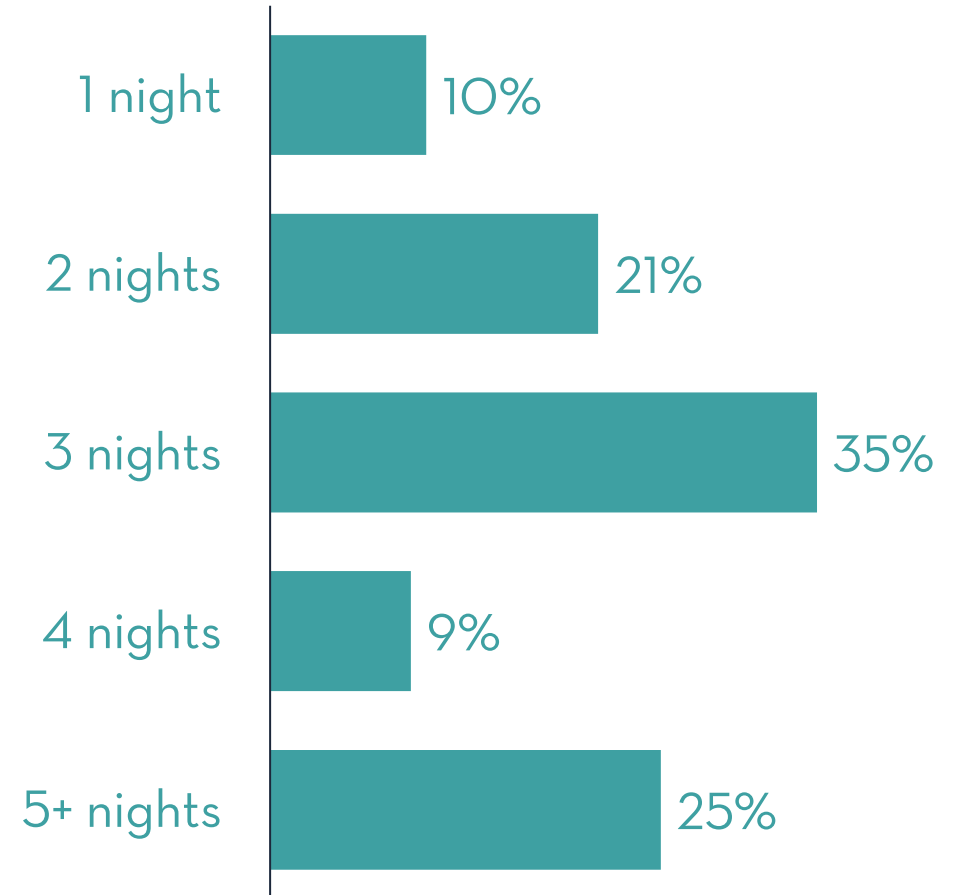
- **3 in 4** visitors **drove** to the area
- **Orlando International** was the **primary airport**, representing **14%** of all visitors



\*Other category includes other airports and/or modes of transportation.

# NIGHTS\*

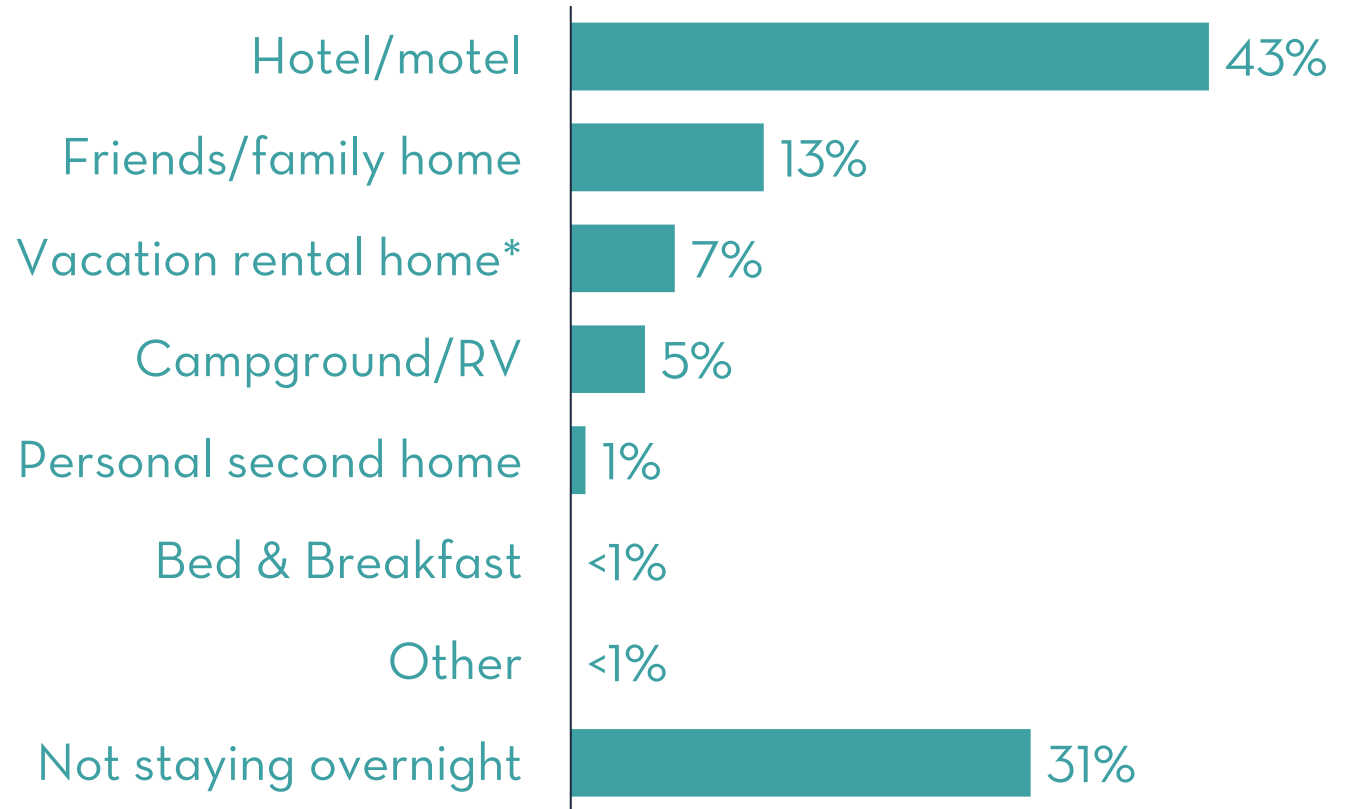
- **3 nights** is the most common length of stay at **35%**
- Nearly **70%** of overnight visitors stayed **3 or more nights**, with an **average stay of 4.1 nights**
- Those staying in **paid accommodations** spent on **average 4.8 nights** in the area



\*Includes visitors who stayed in paid accommodations, unpaid accommodations, and day trippers.

# ACCOMMODATIONS

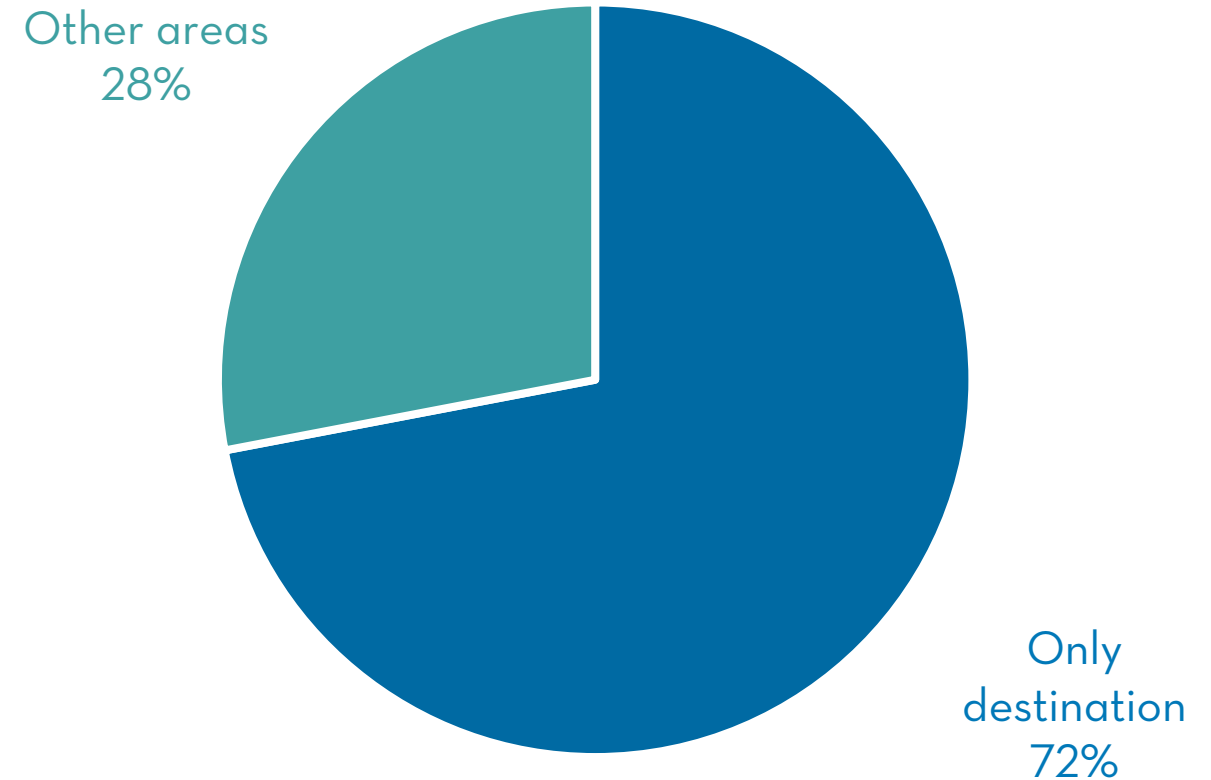
- **Hotels** are the top accommodation choice at **43%** of all visitors
- About a **third (31%)** are **day-trippers** not staying overnight



\*Included Airbnb, Vrbo, etc.

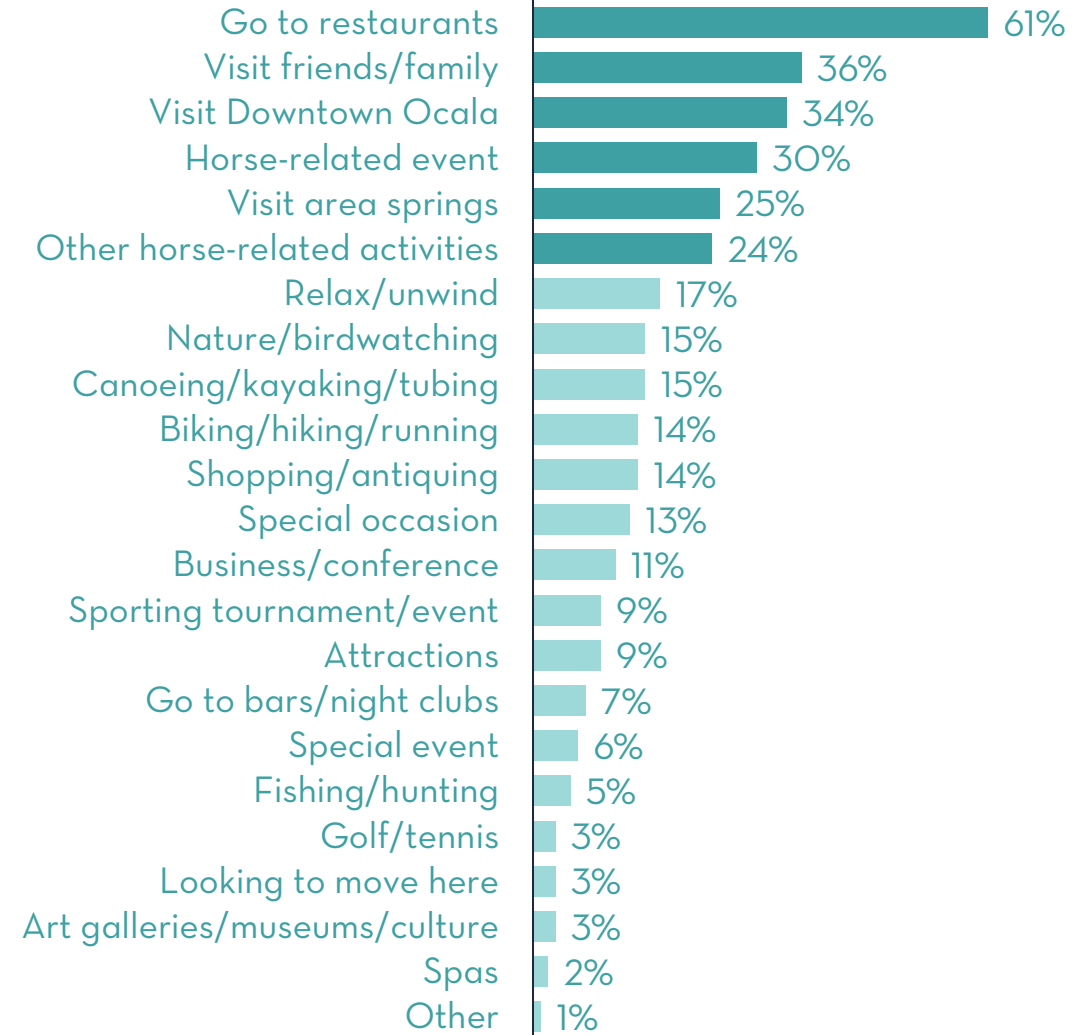
# VISITING OTHER AREAS

- **72%** of visitors made Ocala/Marion County their **only destination**
- **28%** combined their visit with travel to **other areas**



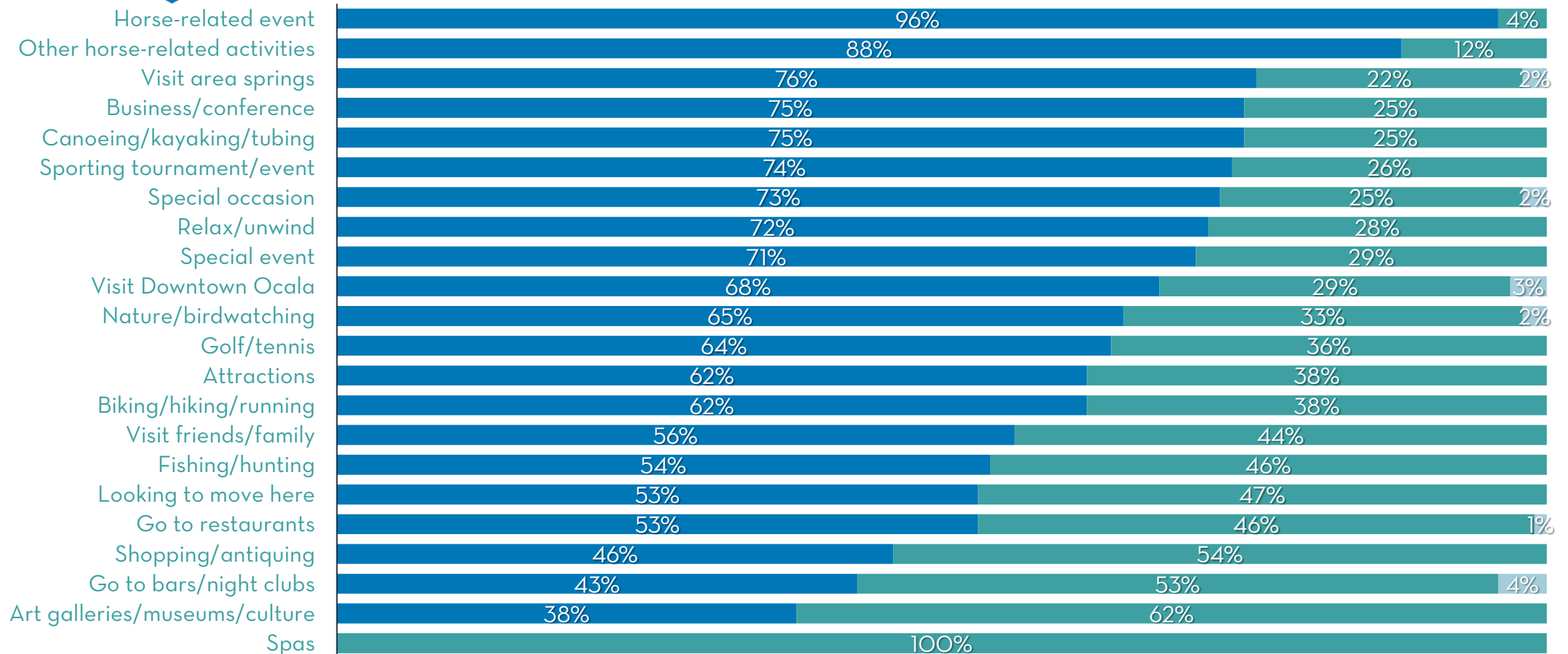
# VISITOR ACTIVITIES\*

- **Dining** is the most popular activity at **61%**, followed by **visiting friends/family (36%)** and **Downtown Ocala (34%)**
- **Horse-related activities** remain strong, with **30%** attending **events** and **24%** engaging in **other equestrian activities**



\*Multiple responses permitted.

# VISITOR ACTIVITY RATINGS\*



■ Exceeded expectations ■ Met expectations ■ Did not meet expectations

\*Observed variability year over year may reflect smaller subsamples.

# ACTIVITIES VS. REASONS FOR VISIT\*

## Reason for Visiting

22%

18%

15%

13%

11%

11%

8%

8%

7%

4%

3%

3%

3%

2%

2%

1%

1%

Horse-related event

Visit friends/family

Visit area springs

Attractions

Canoeing/kayaking/tubing

Special occasion

Business/conference

Other horse-related activities

Sporting tournament/event

Nature/birdwatching

Relax/unwind

Special event

Biking/hiking/running

Visit Downtown Ocala

Looking to move here

Go to restaurants

Shopping/antiquing

## Visitor Activities

30%

36%

25%

9%

15%

13%

11%

24%

9%

15%

17%

6%

14%

34%

3%

61%

14%

\*Multiple responses permitted.

# TRAVEL PARTY SPENDING

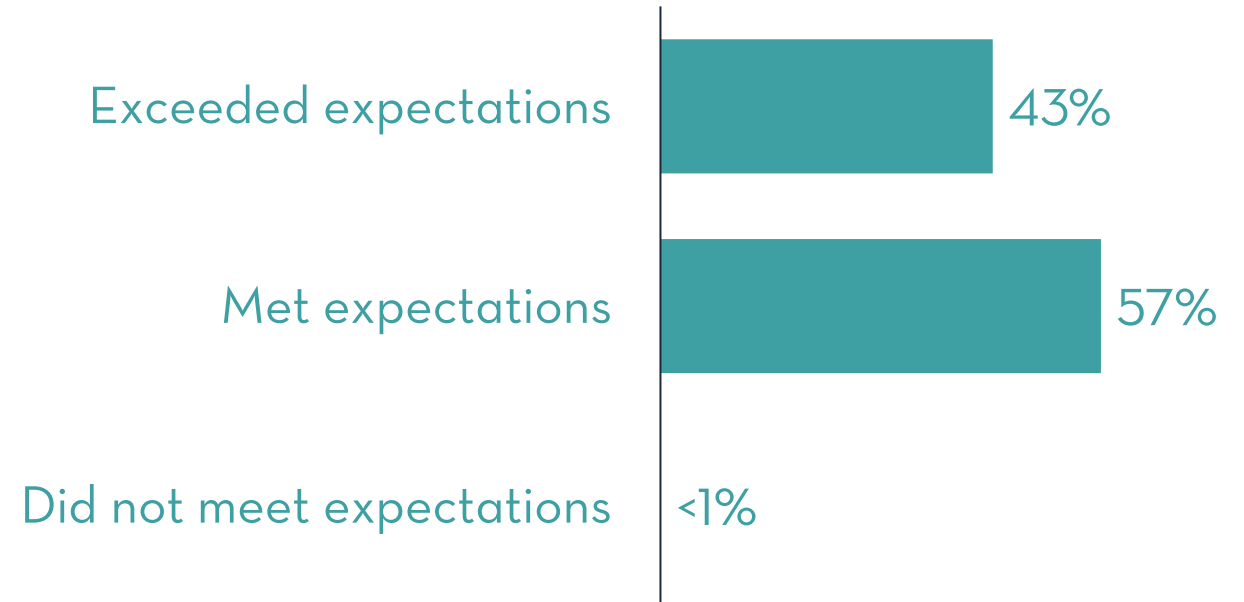
	<b>Daily Spending: All Visitors</b>	<b>Total Spending: All Visitors</b>
<i>Accommodations</i>	<i>\$82*</i>	<i>\$335</i>
<i>Restaurants</i>	<i>\$78</i>	<i>\$320</i>
<i>Groceries</i>	<i>\$17</i>	<i>\$71</i>
<i>Shopping</i>	<i>\$42</i>	<i>\$174</i>
<i>Entertainment</i>	<i>\$51</i>	<i>\$209</i>
<i>Transportation</i>	<i>\$23</i>	<i>\$95</i>
<i>Other</i>	<i>\$32</i>	<i>\$133</i>
<b>Total</b>	<b>\$325</b>	<b>\$1,337</b>

# VISITOR JOURNEY: POST-TRIP



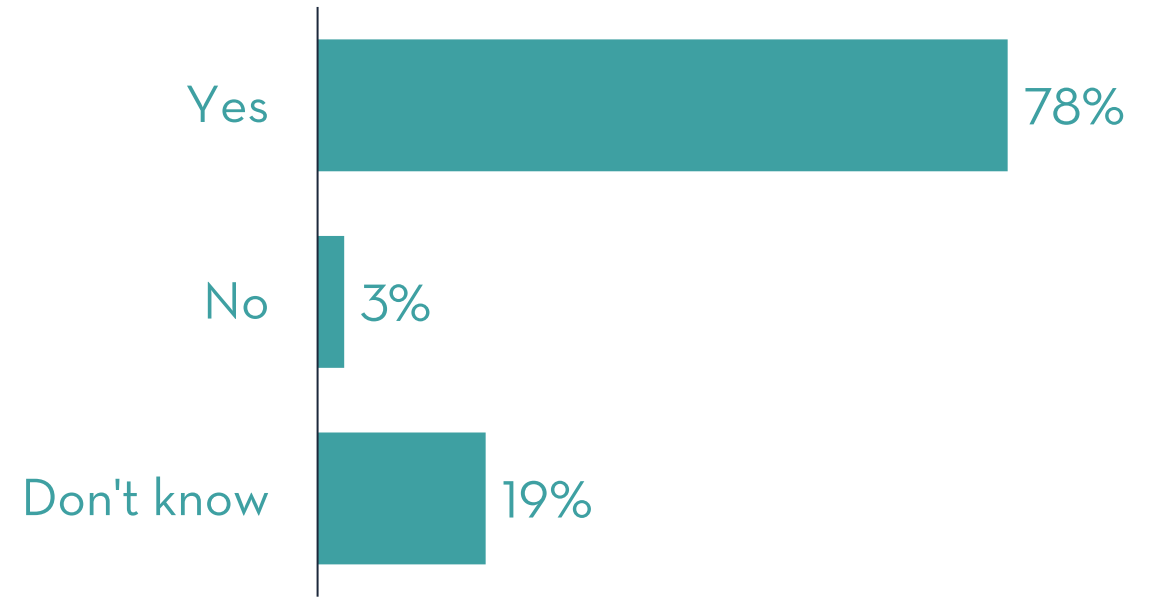
# TRIP EXPERIENCE

- **All** visitors said their trip **met** or **exceeded expectations**
- **43%** said the experience **exceeded** their **expectations**



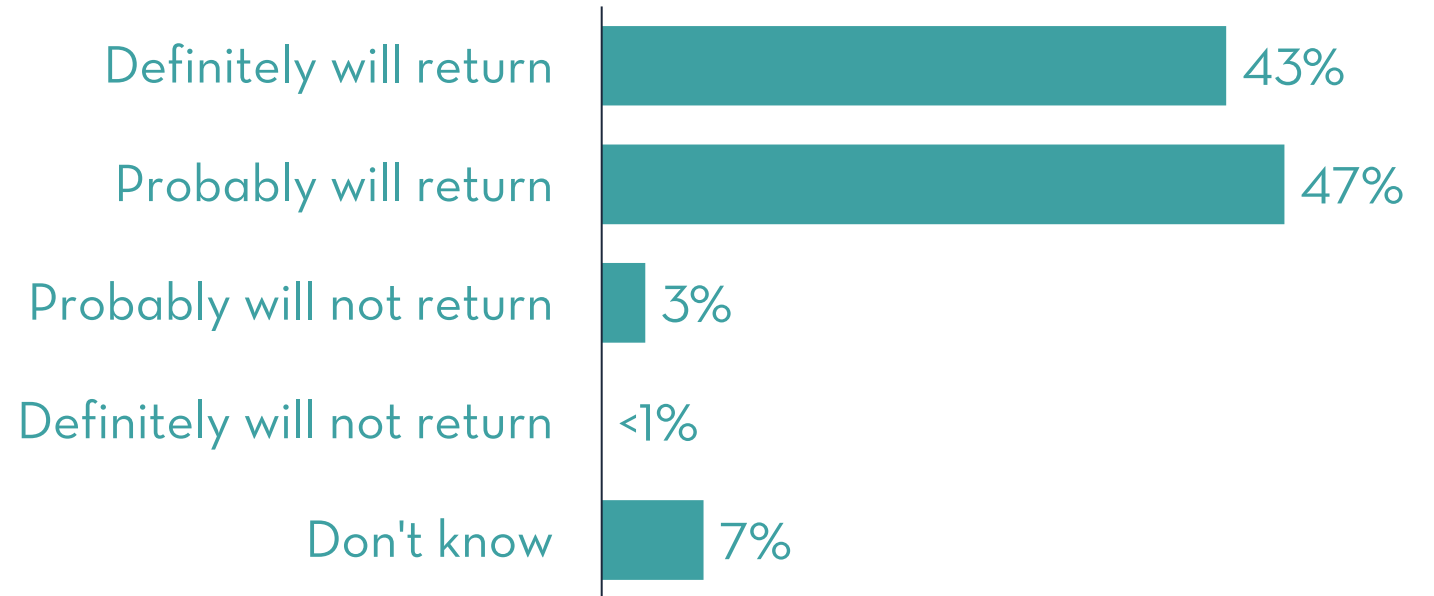
# RECOMMENDATION

- **78%** of visitors said they **would recommend** the area to a friend
- **19%** were **undecided**, likely due to a larger first-time visitor base
- **First-time** visitors were **more likely** to select the **don't know** option, suggesting that they may still be forming their impressions and are less certain about their recommendations



# LIKELIHOOD OF RETURNING

- **90%** of visitors said they would likely return
- **43%** visitors **would definitely return**
- **Preference to visit different destinations** and an **event/occasion** for visit having ended remain as the top two reasons for not returning



# 2026 to 2025 COMPARISONS



# PRE-VISIT

Visitor Metrics	Jan-Mar 2025	Jan-Mar 2026
<i>Ocala/Marion County was the only destination</i>	67%	72%
<i>Viewed Visitors Guide</i>	15%	22%
<i>Visited or called the Visitors Center</i>	9%	6%
<i>Planned trip a month or less in advance</i>	50%	55%
<i>Average number of days trip was planned in advance of it being taken</i>	62	55
<i>Used OcalaMarion.com to plan their trip</i>	4%	1%
<i>Recalled Ocala/Marion County promotions</i>	28%	32%

# PRE-VISIT\*

Reason for Visiting	Jan-Mar 2025	Jan-Mar 2026	Reason for Visiting	Jan-Mar 2025	Jan-Mar 2026
<i>Horse-related event</i>	25%	22%	<i>Special event</i>	3%	3%
<i>Visit friends/family</i>	28%	18%	<i>Biking/hiking/running</i>	1%	3%
<i>Visit area springs</i>	13%	15%	<i>Visit Downtown Ocala</i>	4%	2%
<i>Attractions</i>	3%	13%	<i>Looking to move here</i>	2%	2%
<i>Special occasion</i>	6%	11%	<i>Go to restaurants</i>	6%	1%
<i>Canoeing/kayaking/tubing</i>	6%	11%	<i>Shopping/antiquing</i>	2%	1%
<i>Business/conference</i>	11%	8%	<i>Fishing/hunting</i>	1%	1%
<i>Other horse-related activities</i>	7%	8%	<i>Golf/tennis</i>	1%	1%
<i>Sporting tournament/event</i>	8%	7%	<i>Art galleries/museums/culture</i>	1%	1%
<i>Nature/birdwatching</i>	3%	4%	<i>Go to bars/night clubs</i>	1%	1%
<i>Relax/unwind</i>	8%	3%	<i>Spas</i>	<1%	<1%
			<i>Other</i>	10%	6%

# TRAVEL PARTY PROFILE

Top Origin Markets	Jan-Mar 2025	Jan-Mar 2026
<i>Orlando-Daytona Beach-Melbourne</i>	14.6%	14.7%
<i>Jacksonville</i>	5.7%	9.4%
<i>Tampa-St. Petersburg</i>	7.5%	8.6%
<i>Gainesville</i>	6.7%	5.8%
<i>West Palm Beach-Ft. Pierce</i>	2.5%	5.2%
<i>Miami-Fort Lauderdale</i>	3.5%	3.1%
<i>Philadelphia</i>	1.2%	2.4%
<i>Atlanta</i>	2.8%	2.1%
<i>Mobile</i>	1.4%	2.1%
<i>New York City*</i>	5.0%	2.0%

Top Origin States	Jan-Mar 2025	Jan-Mar 2026
<i>Florida</i>	47.0%	52.3%
<i>Georgia</i>	3.6%	4.7%
<i>Ohio</i>	2.4%	3.4%
<i>Pennsylvania</i>	2.5%	2.7%
<i>Texas</i>	2.3%	2.7%
<i>New York</i>	4.9%	2.6%
<i>South Carolina</i>	1.5%	2.5%

Top Origin Regions	Jan-Mar 2025	Jan-Mar 2026
<i>Southeast (includes Florida)</i>	62.1%	69.3%
<i>Northeast</i>	15.7%	13.2%
<i>Midwest</i>	13.2%	11.5%
<i>West</i>	2.7%	3.1%
<i>International</i>	5.8%	2.9%

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

# TRIP EXPERIENCE

Visitor Metrics	Jan-Mar 2025	Jan-Mar 2026
<i>Travel party</i>	2.9	2.7
<i>Children &lt;20</i>	40%	43%
<i>Median age</i>	51	47
<i>Estimated median household income</i>	\$102,000	\$114,700
<i>1<sup>st</sup> time visitor</i>	40%	49%
<i>10+ visits to Ocala/Marion County</i>	14%	11%

Visitor Metrics	Jan-Mar 2025	Jan-Mar 2026
<i>Drove</i>	77%	75%
<i>Nights spent</i>	4.8	4.1
<i>Direct expenditures (entire trip)</i>	\$1,608	\$1,337

# TRIP EXPERIENCE\*

Visitor Activities	Jan-Mar 2025	Jan-Mar 2026
<i>Go to restaurants</i>	70%	61%
<i>Visit friends/family</i>	41%	36%
<i>Visit Downtown Ocala</i>	33%	34%
<i>Horse-related event</i>	32%	30%
<i>Visit area springs</i>	31%	25%
<i>Other horse-related activities</i>	16%	24%
<i>Relax/unwind</i>	24%	17%
<i>Nature/birdwatching</i>	18%	15%
<i>Canoeing/kayaking/tubing</i>	13%	15%
<i>Biking/hiking/running</i>	10%	14%
<i>Shopping/antiquing</i>	26%	14%
<i>Special occasion</i>	10%	13%

Visitor Activities	Jan-Mar 2025	Jan-Mar 2026
<i>Business/conference</i>	11%	11%
<i>Sporting tournament/event</i>	9%	9%
<i>Attractions</i>	8%	9%
<i>Go to bars/night clubs</i>	9%	7%
<i>Special event</i>	10%	6%
<i>Fishing/hunting</i>	4%	5%
<i>Golf/tennis</i>	7%	3%
<i>Looking to move here</i>	6%	3%
<i>Art galleries/museums/culture</i>	6%	3%
<i>Spas</i>	3%	2%
<i>Other</i>	7%	1%

# POST TRIP EVALUATION

Satisfaction Metrics	Jan-Mar 2025	Jan-Mar 2026
<i>Visit Met + Exceeded expectations</i>	99%	100%
<i>Will return to Ocala/Marion County</i>	94%	90%
<i>Will recommend Ocala/Marion County</i>	90%	78%

# OCALA/MARION COUNTY VCB

Economic Impact Study &  
Visitor Tracking Report  
January – March 2026

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