

# 2021 Presidio Visitor Profile Report

September 13, 2022

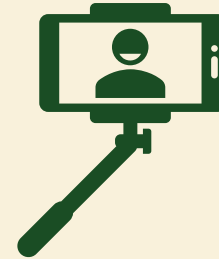
**PRESIDIO  
TRUST**



# BECOMING A NATIONAL PARK SITE FOR ALL



In 2008, **only 5% of Presidio visitors** were “first-time”



In 2018, **40% of Presidio visitors** were “first-time” visitors



In 2008, Presidio visitors overwhelmingly came from the **five closest zip codes**



In 2021, the Presidio is a **local, regional, and international destination**

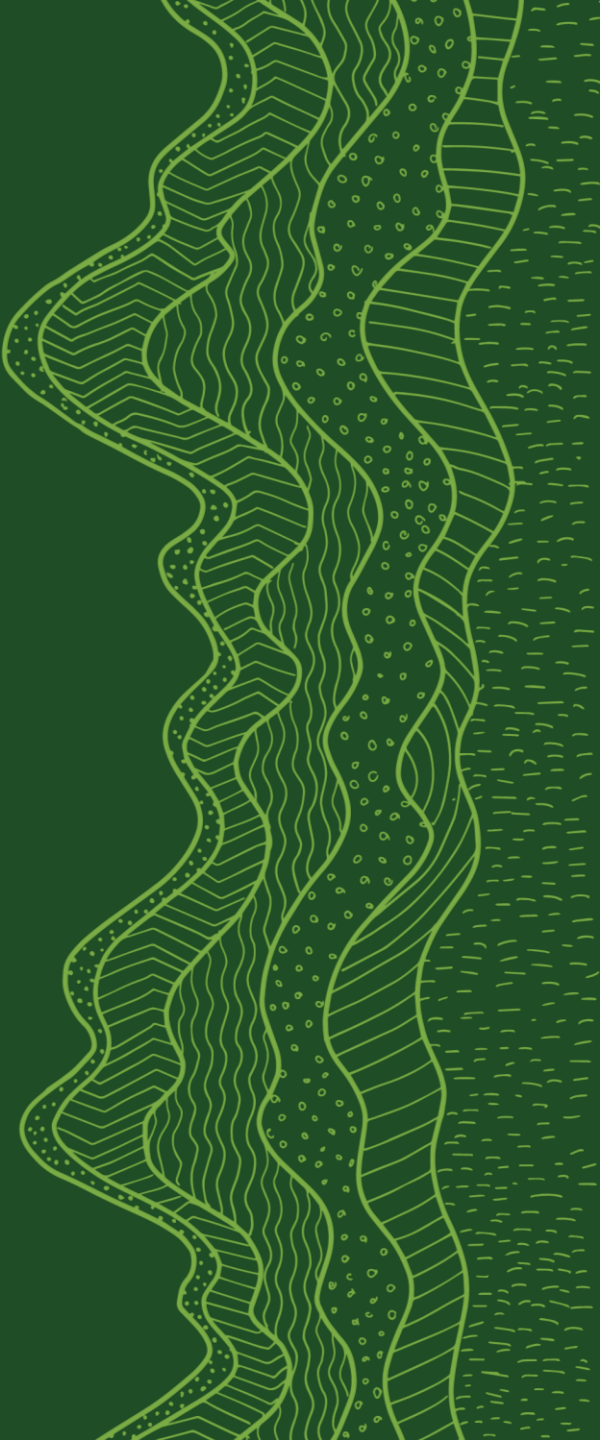


In 2008, Presidio visitors **did not reflect the racial diversity** of the Bay Area.

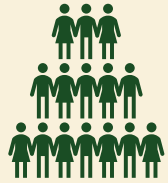


In 2021, Presidio visitors **are tracking more closely to the diversity** of the Bay Area.

# 2021 SUMMARY



# VISITATION TO THE PRESIDIO BEGINS TO RETURN TO PRE-PANDEMIC LEVELS



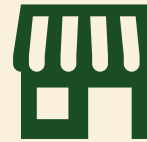
In 2021, **visitation to the Presidio increased to 7.4 million** in part due to the easing of COVID-19 restrictions.



The Presidio's distinction as a national park site **increased interest in visiting by 5.3% to 47.7%**.



Visitation from **domestic markets outside of the San Francisco Bay Area increased 70%** over 2020.



Nearly 60% of SF Bay Area residents stated that learning about the Trust's unique business model affects their likelihood to support Presidio businesses, an **increase of 9.8% over last year**.



Visitation from **ethnically diverse and low-income audiences** continue reflect the Bay Area demographics.



Awareness of nearly all Presidio offerings and amenities increased from last year, most notably with **awareness of campsites in the Presidio up 32.5% and tenant offerings up 7.8%**.

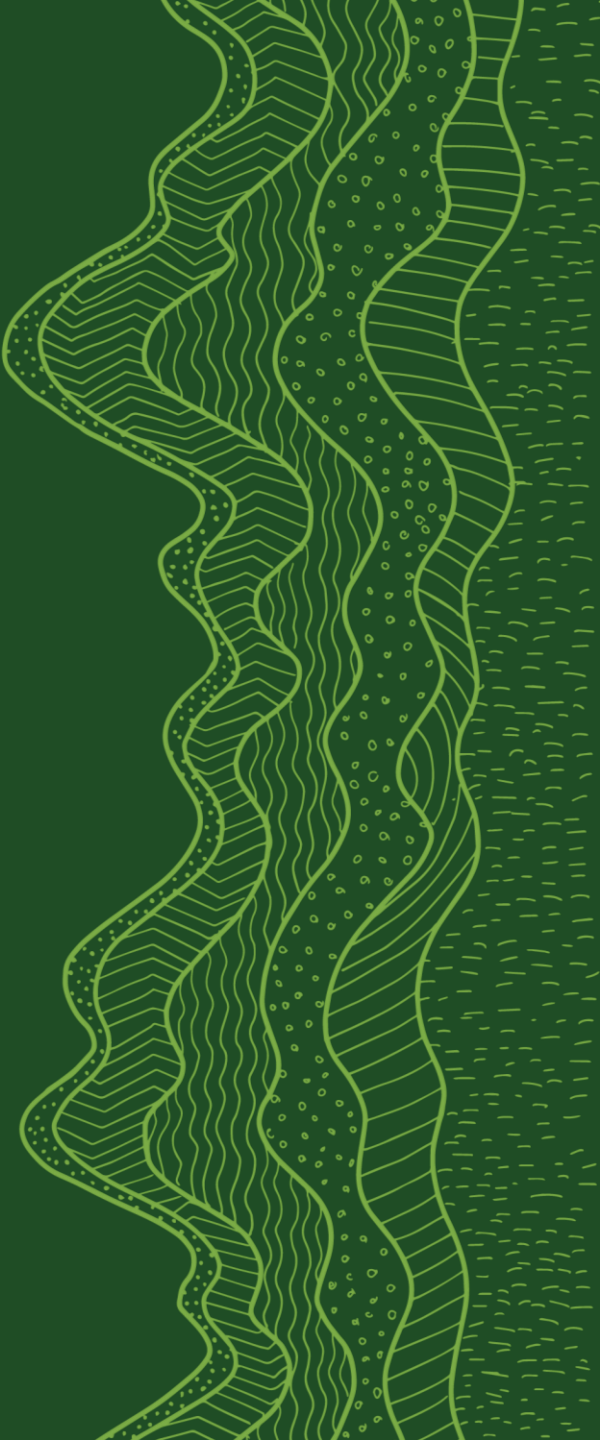


**Awareness of the Presidio is growing at 78%** among SF Bay Area residents.



On a 10-point scale, the **likelihood to recommend the Presidio as a place to visit increased from 7.1 to 7.4**.

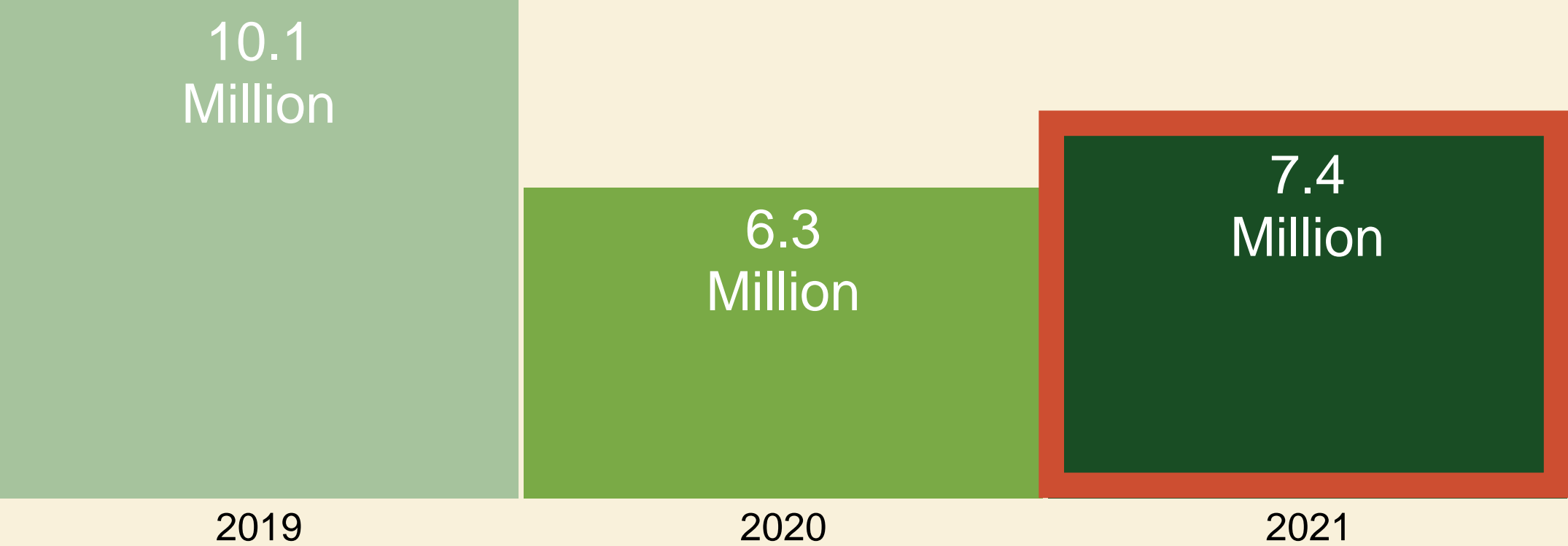
# 2021 VISITATION VOLUME



# IN 2021, THE PRESIDIO WELCOMED 7.4 MILLION VISITORS TO THE PARK

## Visitation to the Presidio (2019-2021)

Calendar year

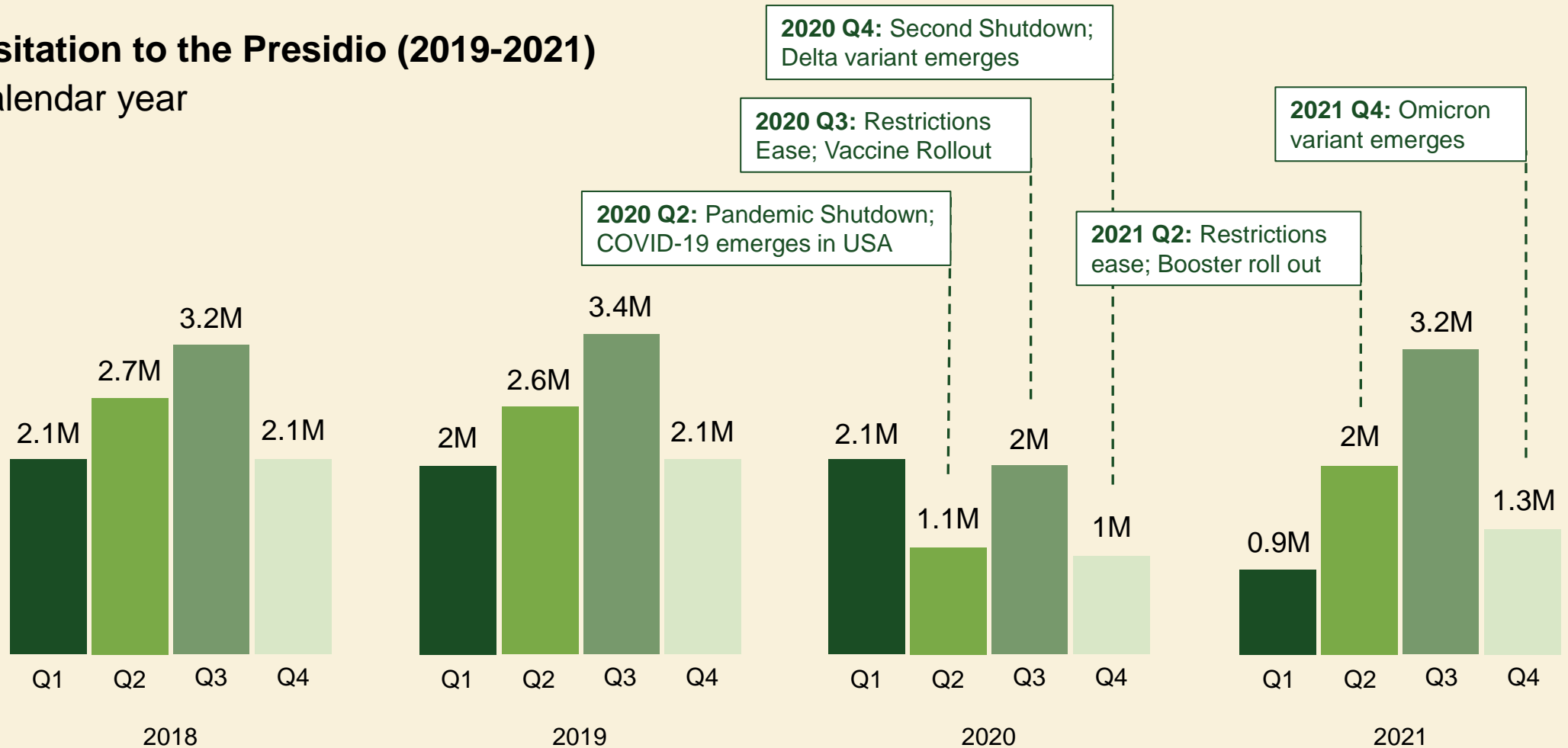


Source: Tourism Economics Visitation Report (2021)

# SEASONAL VISITATION PATTERNS IN 2021 BEGIN TO TREND TOWARDS PRE-PANDEMIC LEVELS

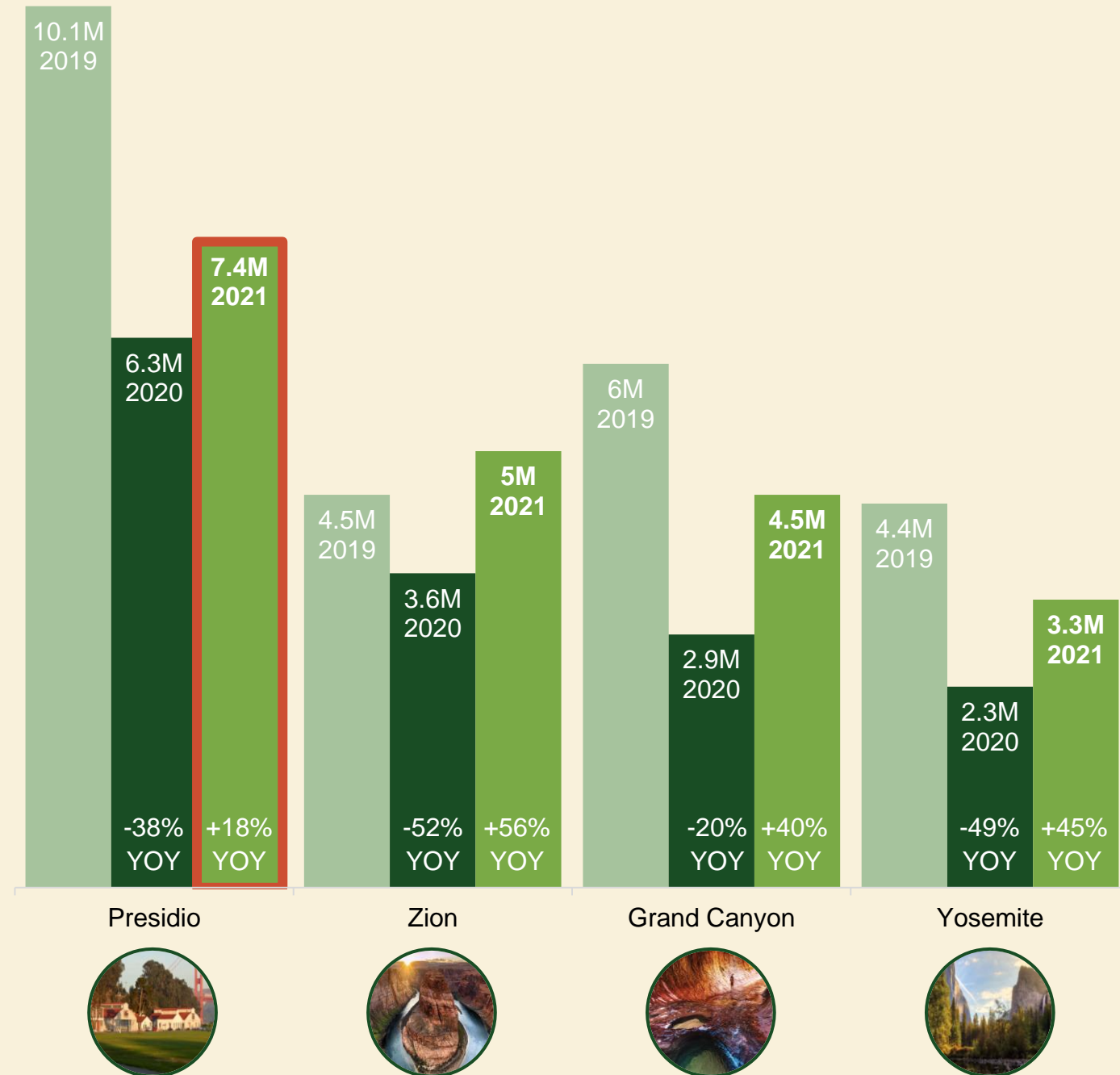
## Visitation to the Presidio (2019-2021)

Calendar year



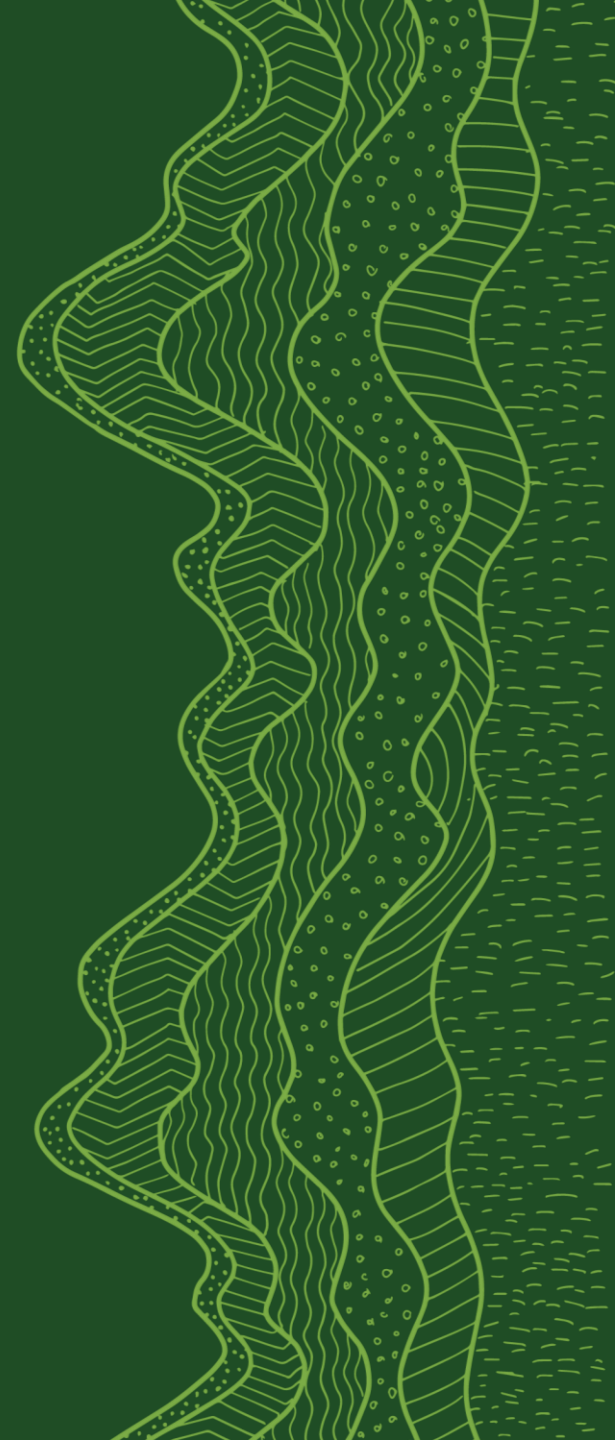
# VISITATION ACROSS ALL NATIONAL PARKS IMPROVED IN 2021

In 2021, Presidio visitation represented 73% of pre-pandemic 2019 visitation.





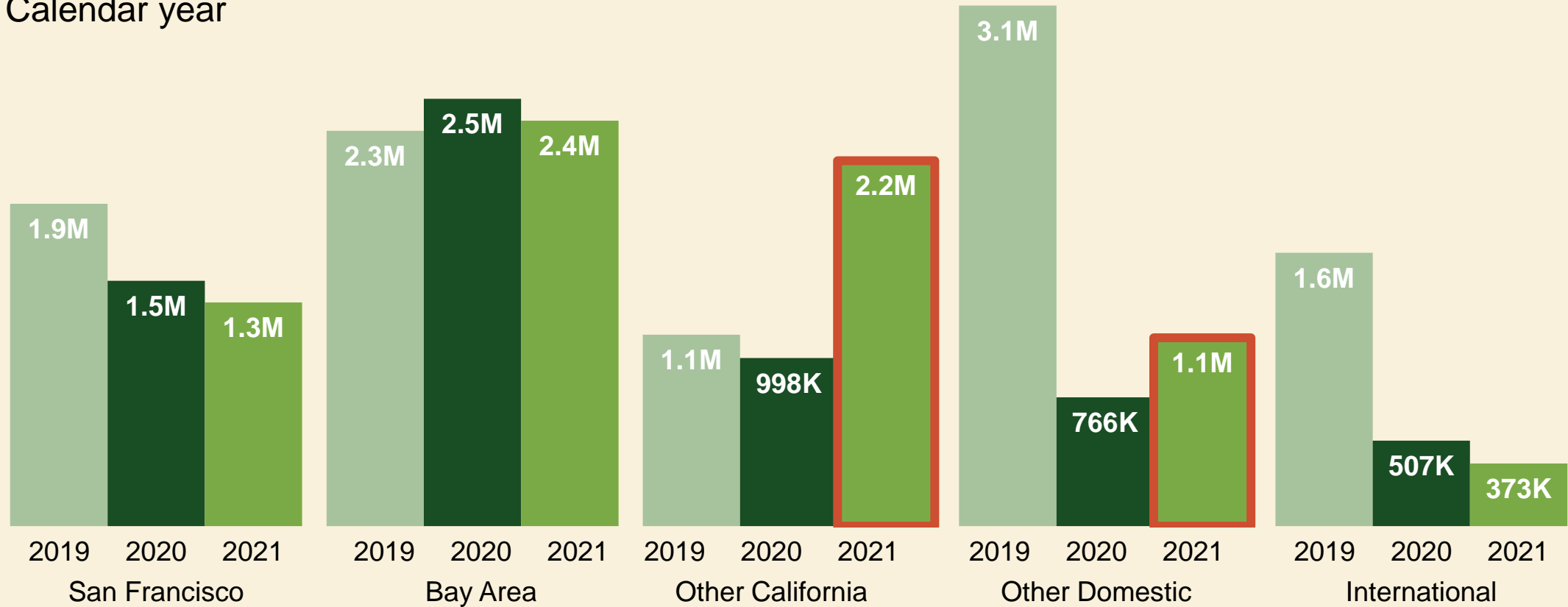
# 2021 ORIGIN OF VISITORS



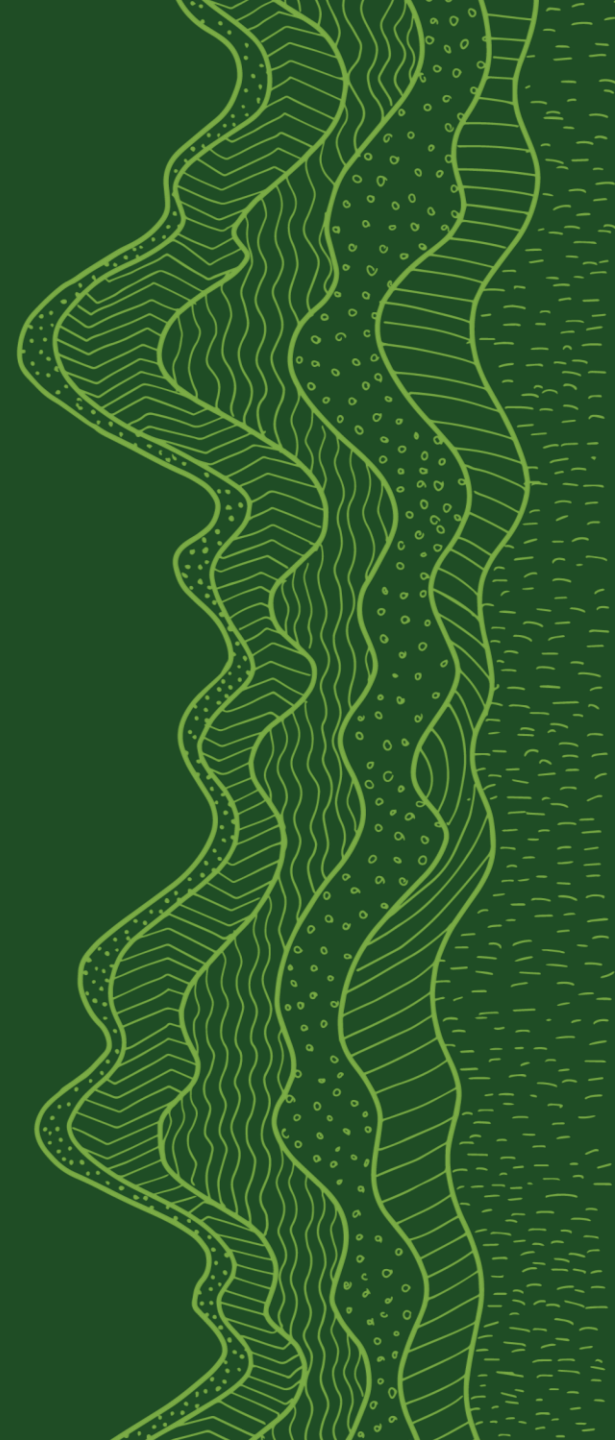
# CALIFORNIA VISITATION DOUBLES IN 2021

## Visitation to the Presidio (2019-2021)

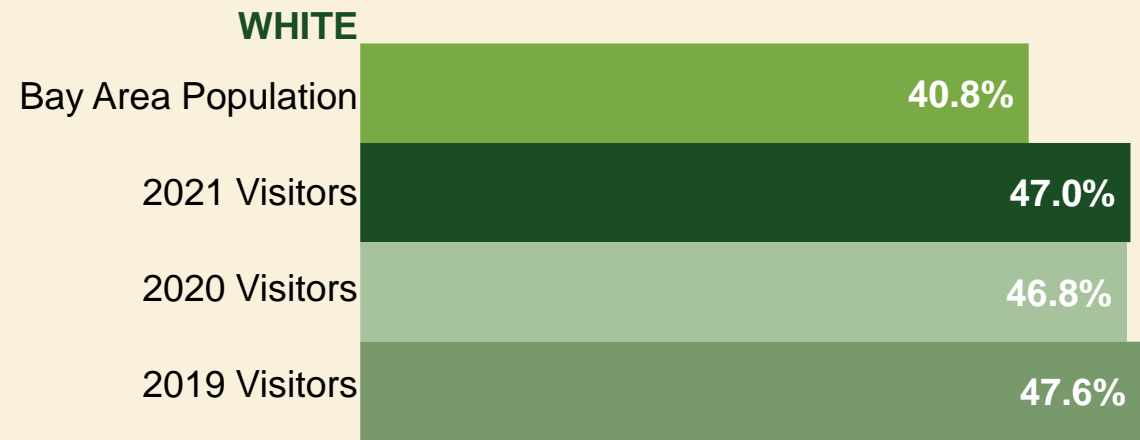
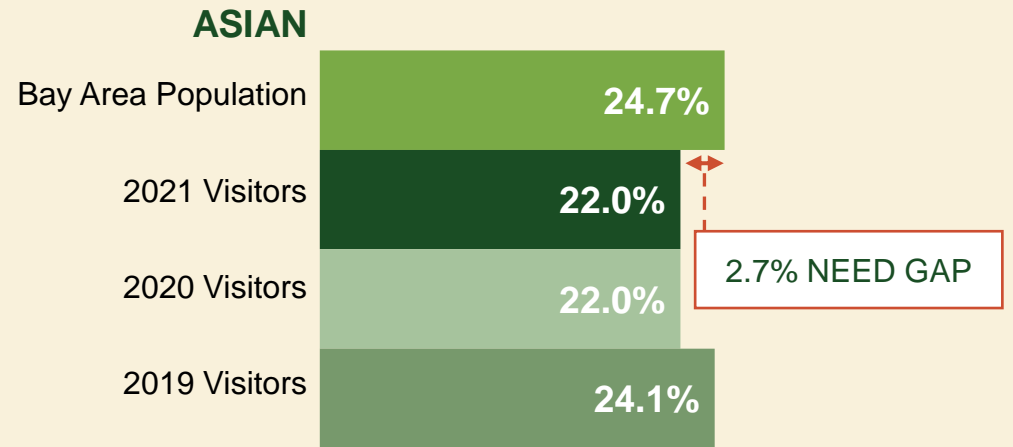
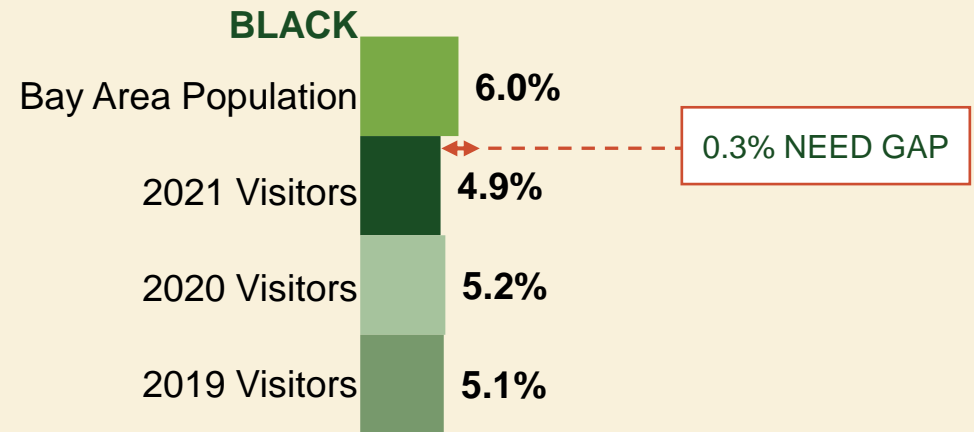
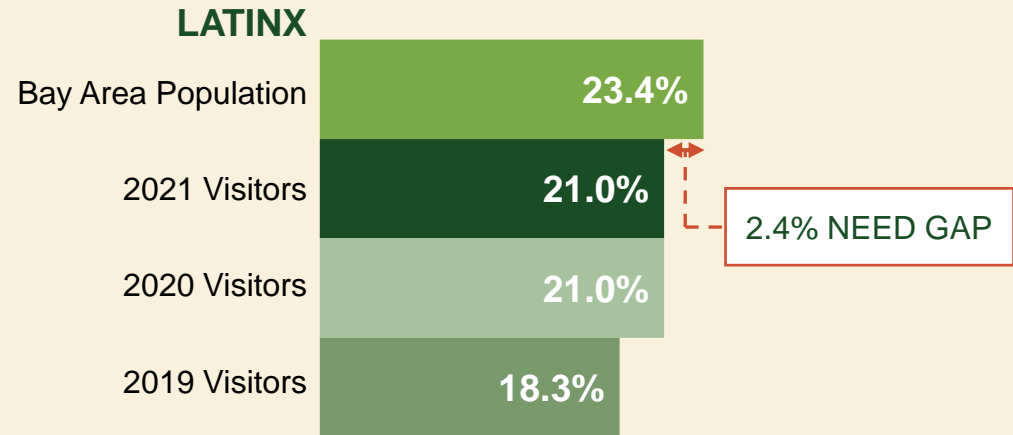
Calendar year



2021 VISITOR DEMOGRAPHICS  
+  
SOCIOECONOMIC INFORMATION

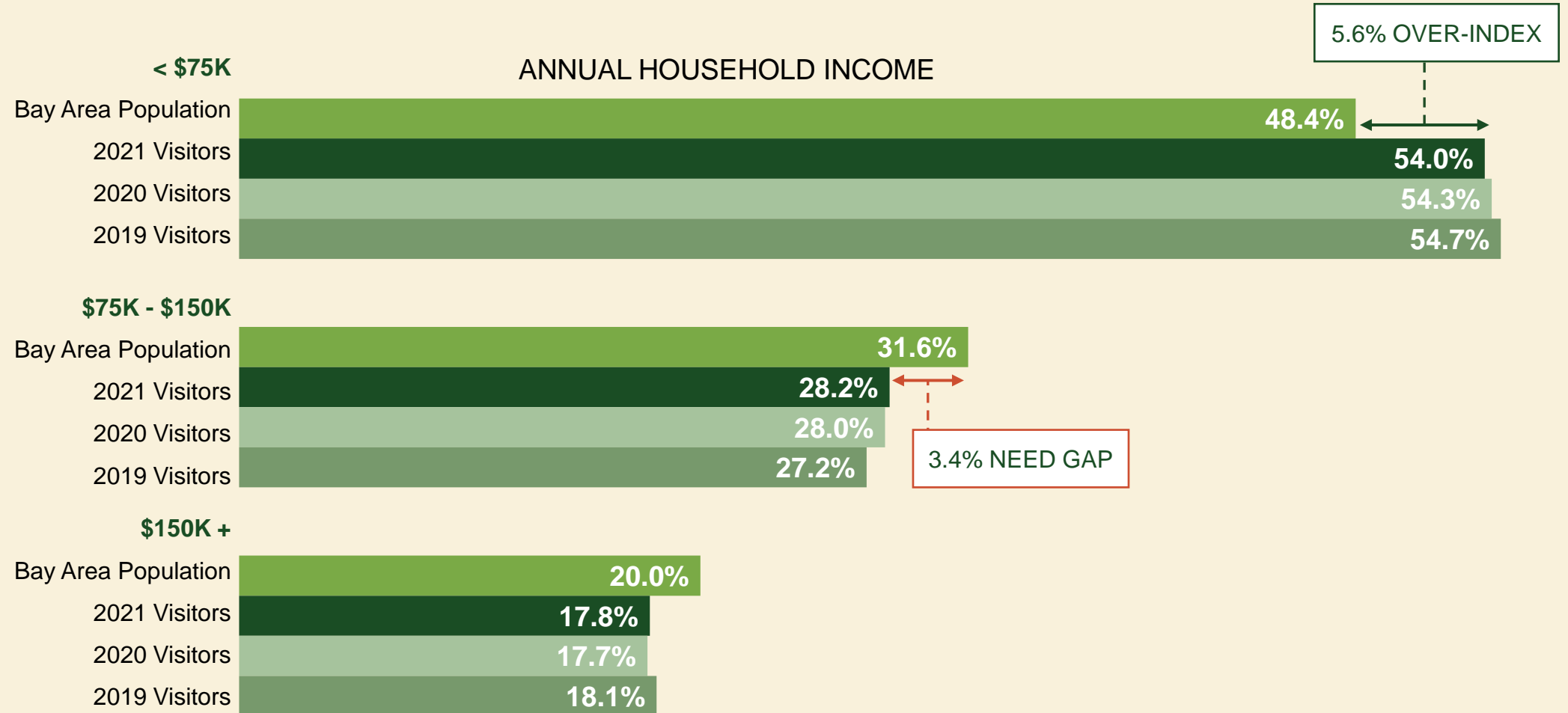


# PRESIDIO VISITORS GETTING CLOSER TO THE RACIAL DIVERSITY OF THE BAY AREA





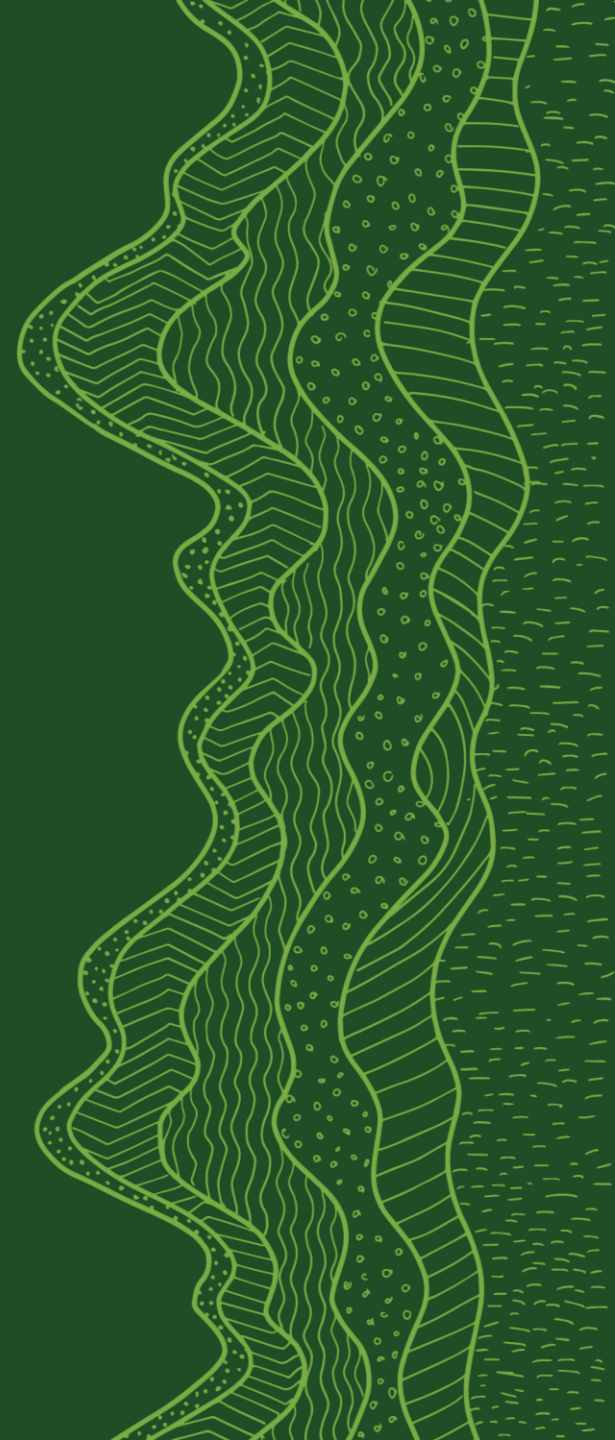
# SOCIOECONOMIC PROFILE OF TODAY'S VISITORS CLOSELY ALIGNS TO THE BAY AREA



2021 AWARENESS

+

VISITOR SATISFACTION LEVELS



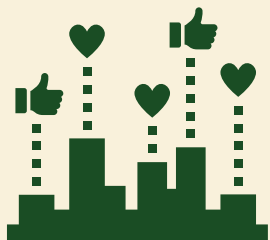
# THE PUBLIC'S PERCEPTION OF THE PRESIDIO IMPROVED IN 2021



The Presidio's affiliation with the national park system improves this audience's interest in visiting.



Feels the Presidio is a welcoming place for them.



How likely are you to recommend the Presidio as a place to visit to a friend or family member?

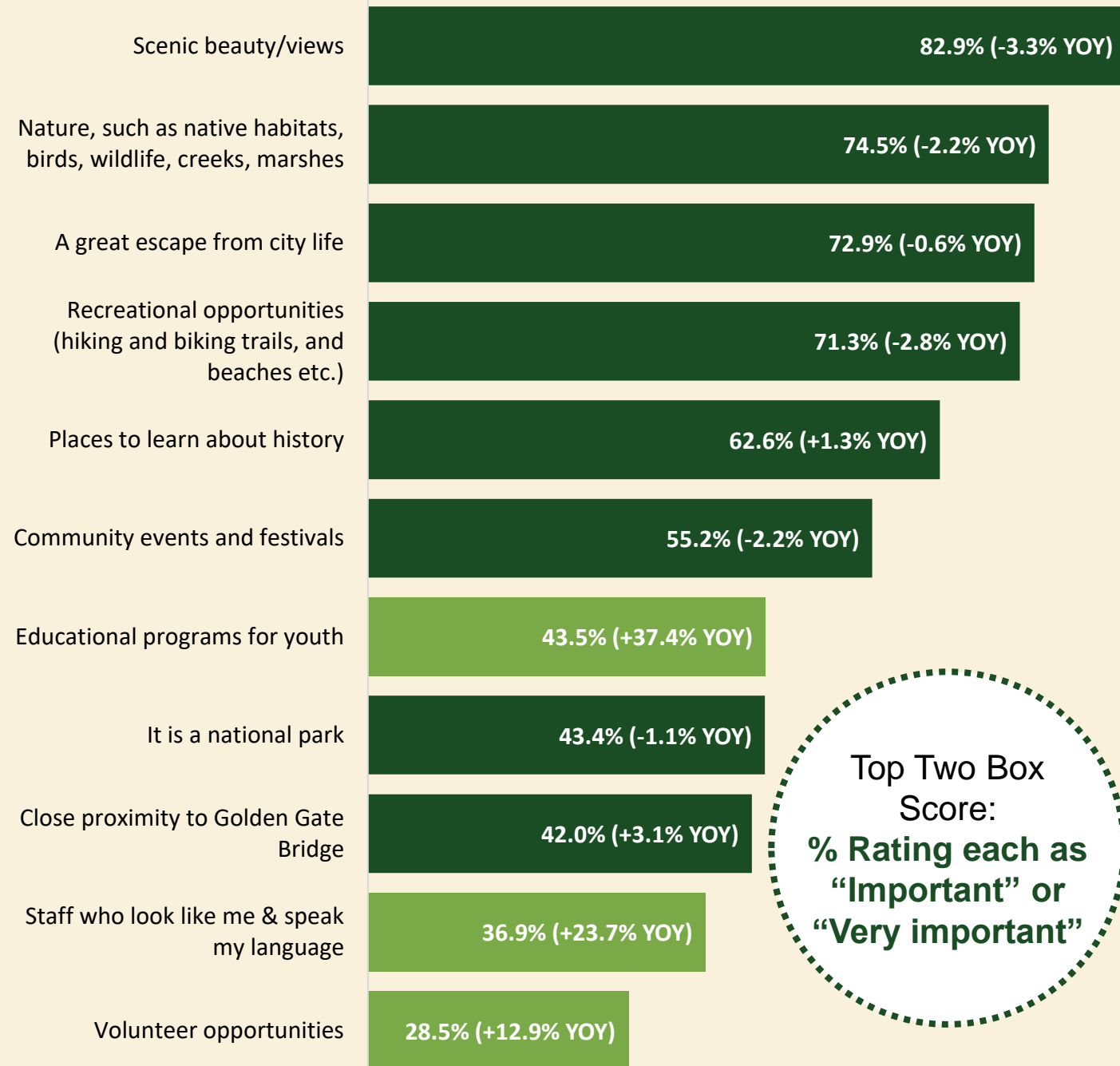


0 1 2 3 4 5 6 7 8 9 10  
LESS LIKELY TO RECOMMEND AVERAGE MORE LIKELY TO RECOMMEND

# UNIQUE REASONS TO COME TO THE PRESIDIO

**QUESTION:** What would motivate you to visit the Presidio? Please rate the following attributes by importance.

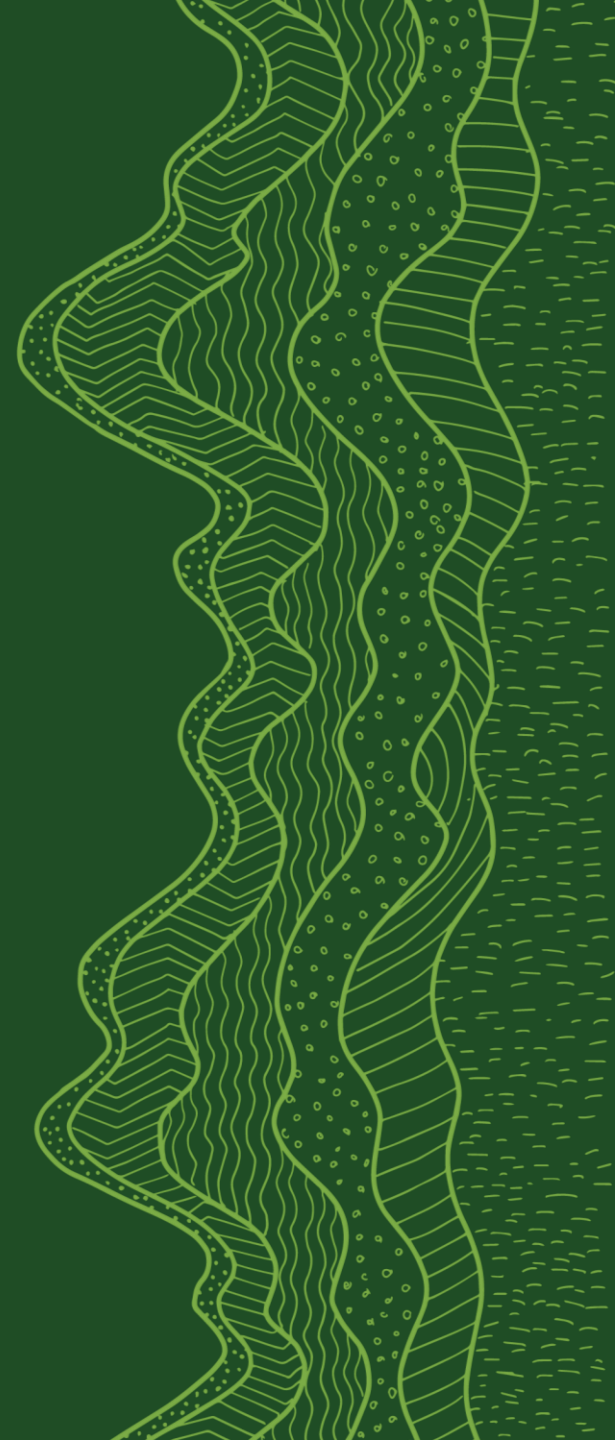
*Base: All respondents, 1,200 responses*



Top Two Box Score:  
% Rating each as "Important" or "Very important"



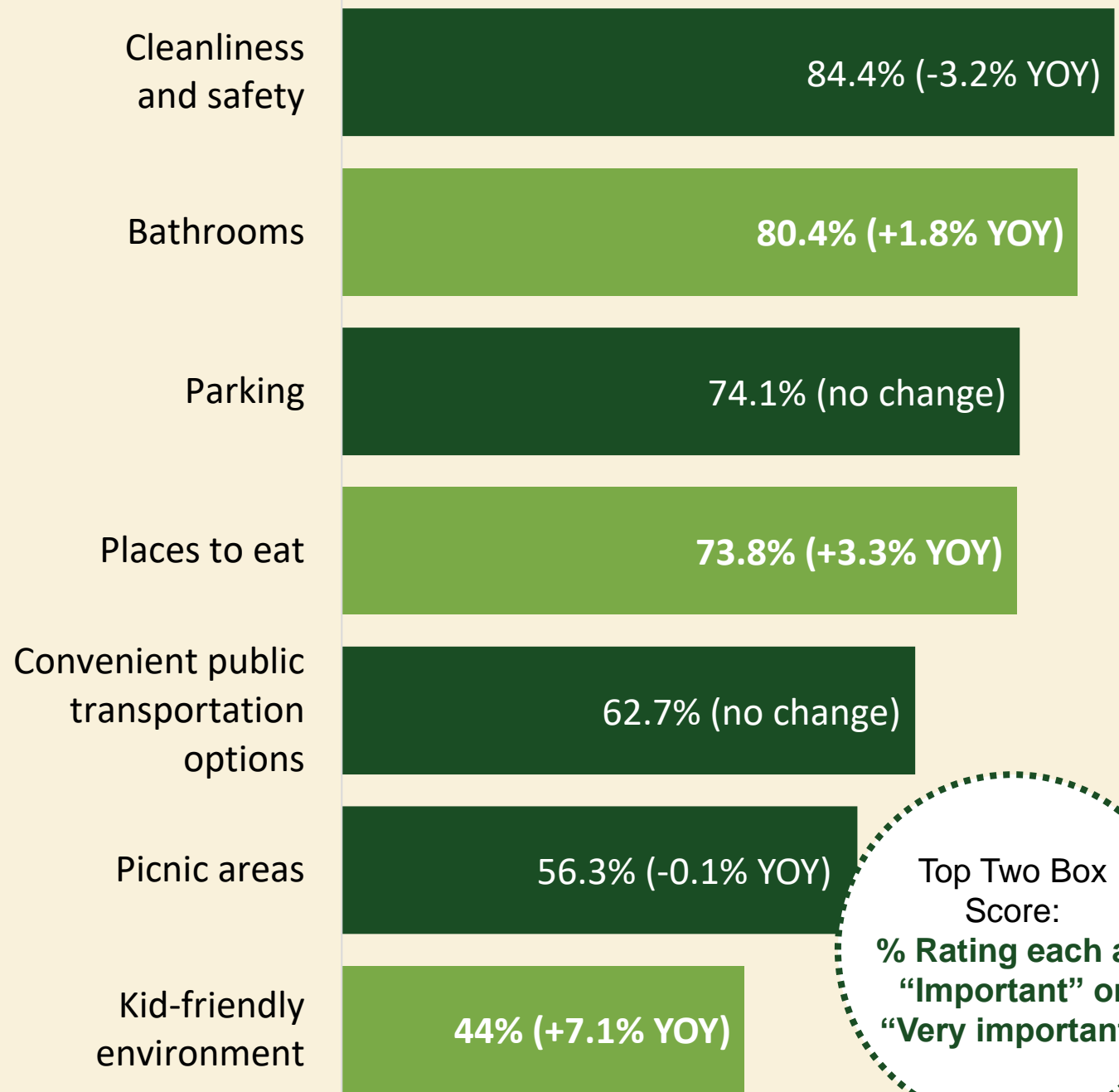
WHAT MOTIVATES VISITORS TO  
COME TO THE PRESIDIO IN 2021?



# IMPORTANT AMENITIES + PLACE ATTRIBUTES ARE IMPORTANT TO SUPPORTING SUCCESSFUL VISITATION

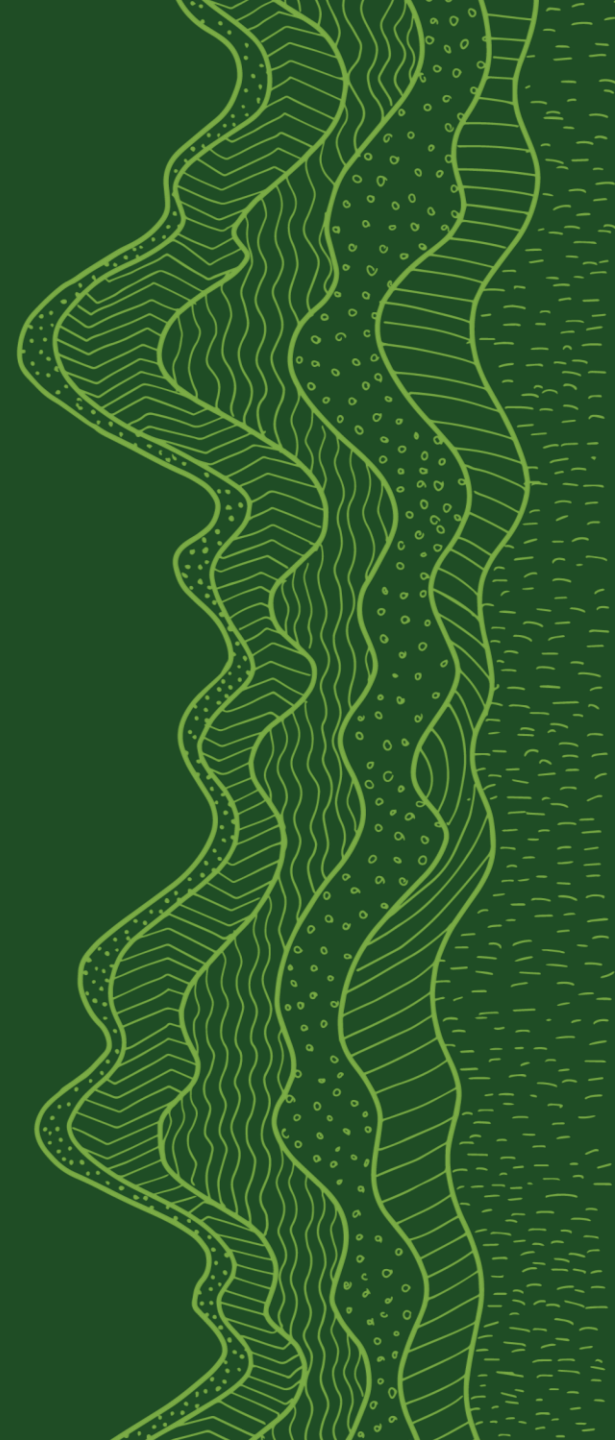
**QUESTION:** What is most important to you when choosing to visit a San Francisco Park?

*Base: All respondents, 1,200 responses*



Top Two Box Score:  
% Rating each as "Important" or "Very important"

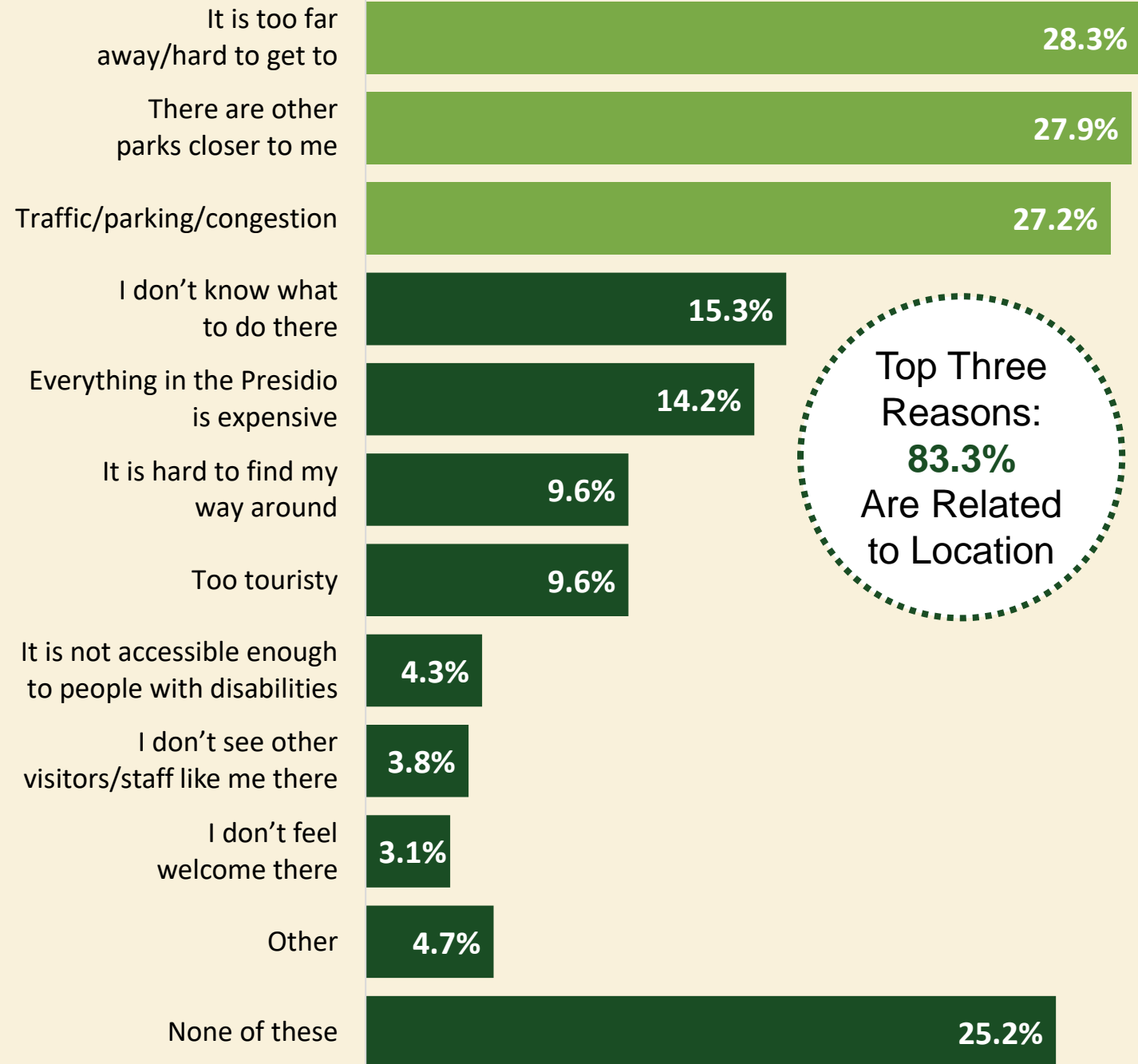
WHAT PREVENTS VISITORS FROM  
COMING TO THE PRESIDIO IN 2021?



# REASONS PEOPLE DON'T VISIT THE PRESIDIO

**QUESTION:** If you visit the Presidio rarely or not at all, please tell us why. (Select all that apply)

Base: All respondents; 1,200 responses





# Thank You

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