

# 2020 PRESIDIO VISITOR PROFILE REPORT

November 17, 2021



Presidio  
Trust

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# BECOMING A GREAT VISITOR DESTINATION

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# PARTNERSHIP for the PRESIDIO

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Presidio  
Trust



## MISSION OF THE PRESIDIO TRUST

“The Presidio Trust stewards and shares the beauty, history, and wonder of the Presidio for everyone to enjoy forever.”

## PART OF THE MOST VISITED NATIONAL PARK IN THE COUNTRY

Presidio is located within the  
**Golden Gate National  
Recreation Area (GGNRA)**

**12.4 million annual visitors** to  
the GGNRA – one of the most  
visited national parks in the  
country



# NATIONAL PARK AT THE GOLDEN GATE

**1,491** Acres

**800+** Buildings

**5.9M** SQ. FT. Built Space

**3.8M** SQ. FT. Commercial

**2.1M** SQ. FT. Residential

**200+** Businesses

**1,400** Residences

**7,500** People Live/Work Here



# VISITOR RESEARCH/ COLLECTION METHODS

2

# WE ANALYSE VISITOR DATA TO ENSURE WE ARE SERVING A BROAD AND DIVERSE PUBLIC

*Who visits the Presidio?*

*Where do they come from?*

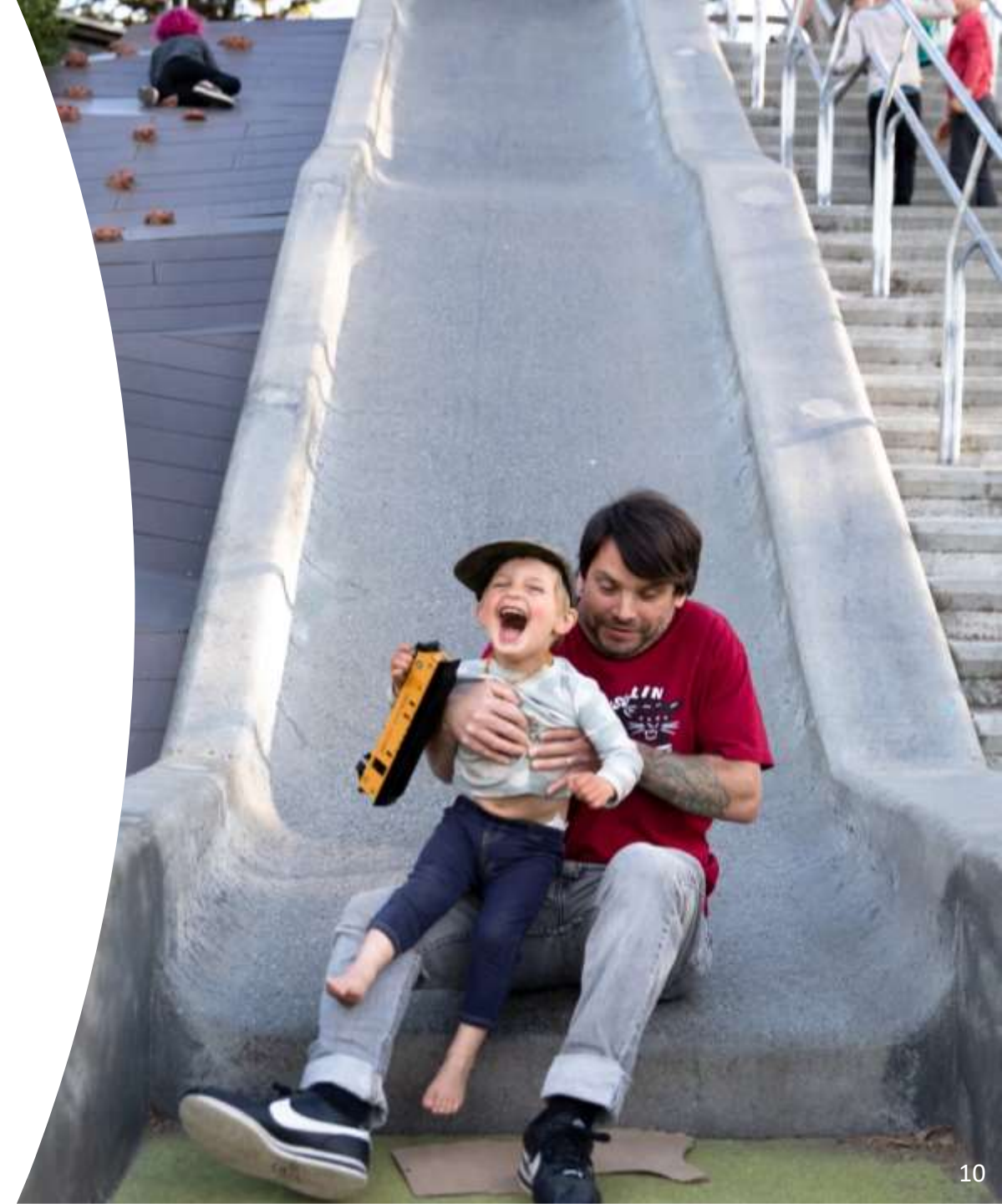
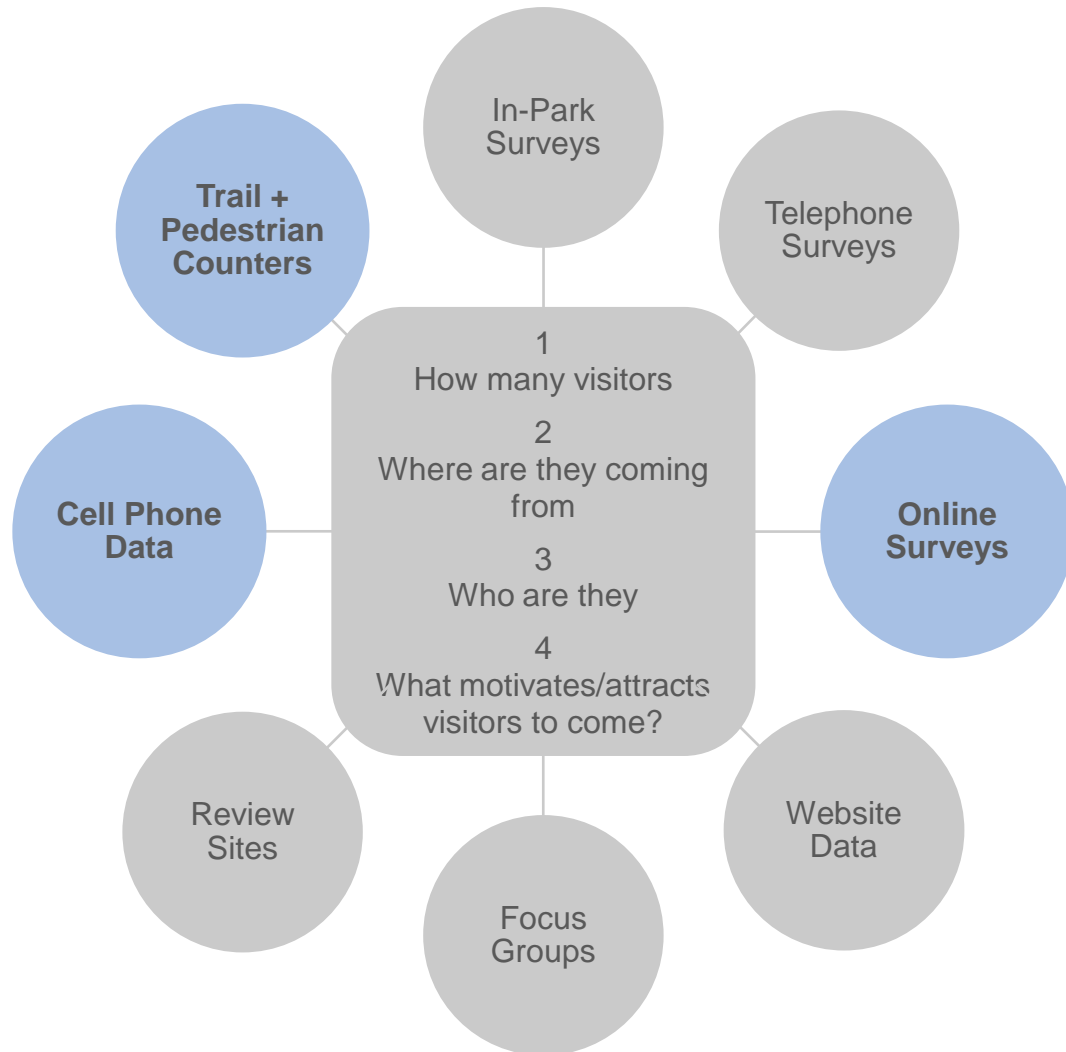
*Why do they visit?*

*What will inspire them to come back?*

*Why might they not visit?*



# WE USE MANY SOURCES TO UNDERSTAND OUR VISITORS



# WE LAYER RESEARCH TO GAIN NEW INSIGHTS

## Attitude Awareness and Understanding Survey

- Destinations Analysts
- Data source:
  - Online Surveys
- Margin of error: 2.5-3%
- Audience
  - Bay Area Visitors
  - Commercial Renters
  - Residential Renters
  - High-End Bay Area Hotel Guests

## Visitation Volume and Demographics Report

- Tourism Economics
- Data source:
  - Anonymized Cellphone Data
  - Trail Counter Data
- Margin of error: 2.47%
- Audience
  - Visitors



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# RESEARCH OUTCOMES

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# VISITATION TO THE PRESIDIO WAS SEVERELY AFFECTED BY THE COVID-19 PANDEMIC



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In 2020, visitation to the Presidio dropped to 6.3 million due to COVID-19 restrictions.



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Many people know of the Presidio, but don't initially think of it as a park.



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Visitation from Bay Area residents increased 8% to 2.5 million visits in 2020.



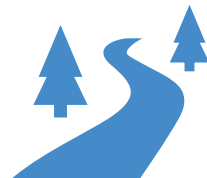
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The Presidio's affiliation with the national park system and unique funding model improves people's interest in visiting and supporting park businesses.



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The demographic profile of Presidio visitors more closely reflects the diversity of the Bay Area.

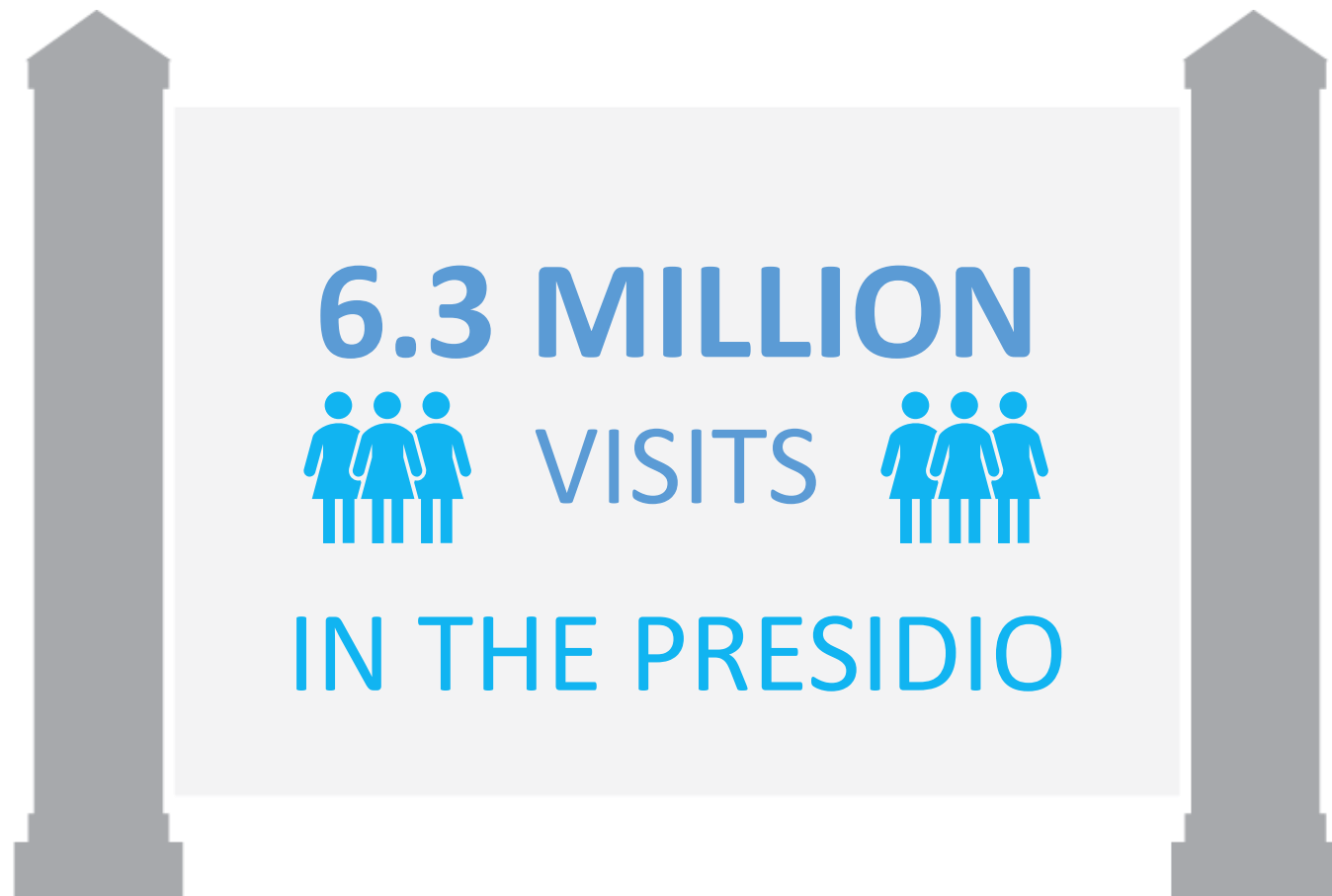


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The top motivators to visit are our scenic beauty and views.

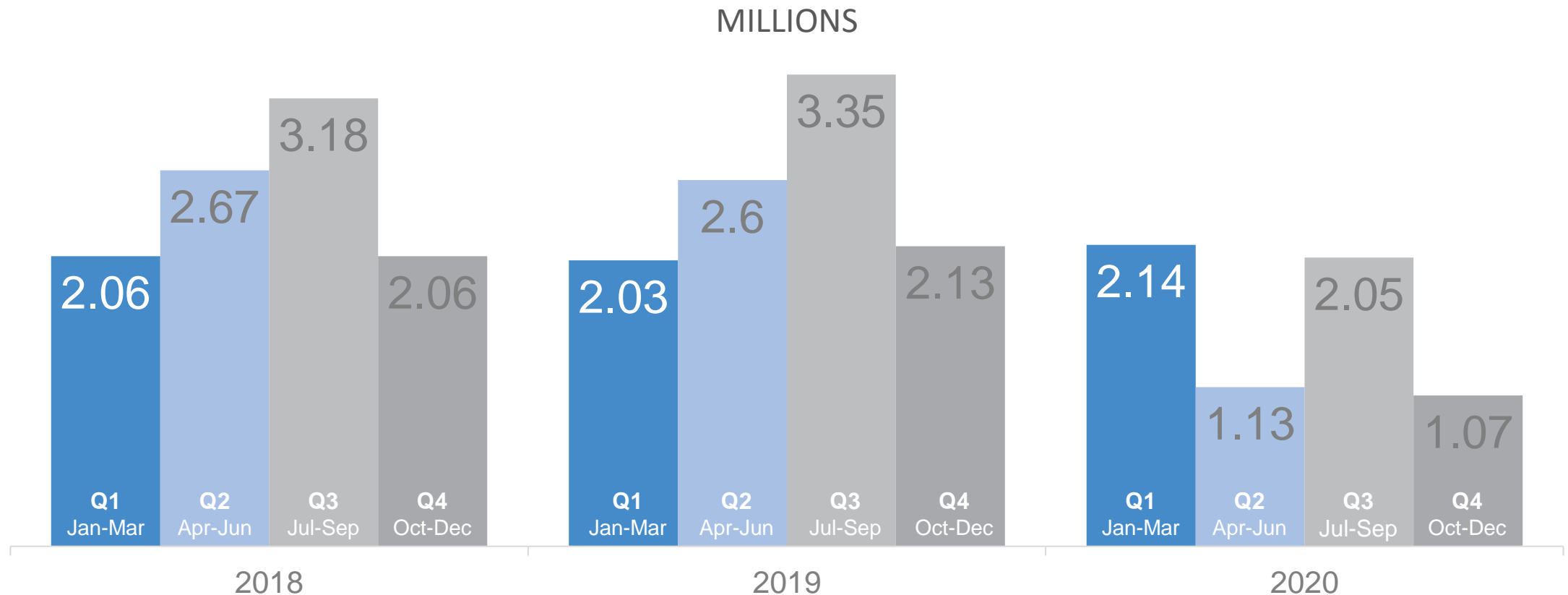
# VISITATION VOLUME + DEMOGRAPHICS

# HOW MANY VISITORS DID THE PRESIDIO SEE IN 2020?



# IN 2018 AND 2019, THE PRESIDIO EXPERIENCED SIMILAR SEASONAL VISITATION PATTERNS

IN 2020, VISITATION PATTERNS ARE CONSISTENT WITH CALIFORNIA AND SAN FRANCISCO SHUTDOWN ORDERS.

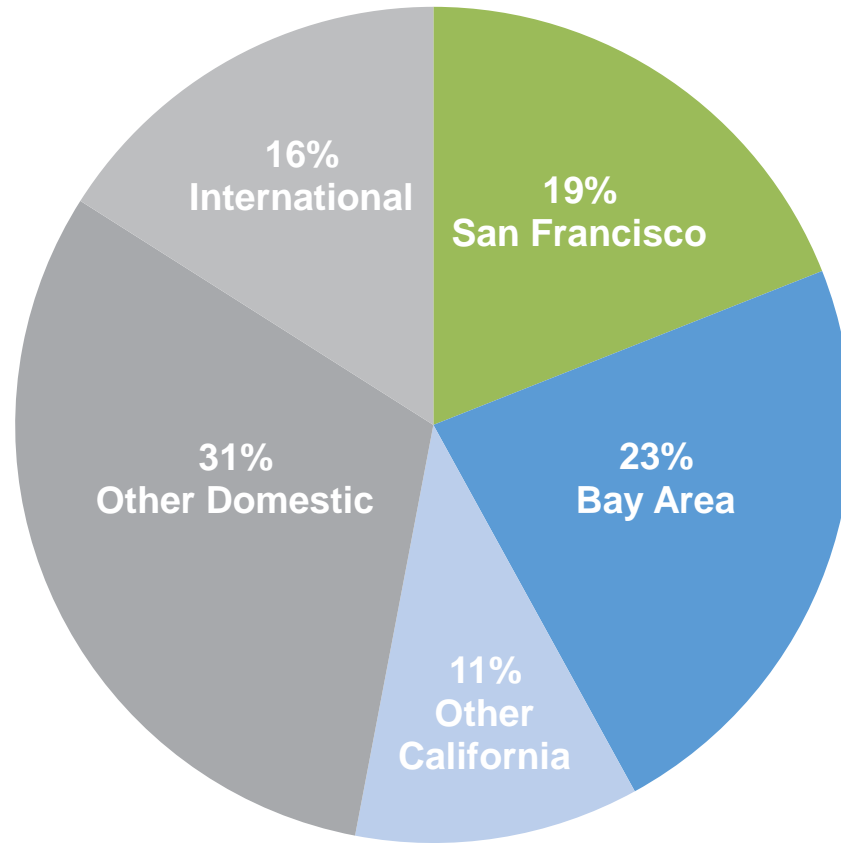


# THE EFFECTS OF THE GLOBAL SHUTDOWN WAS FELT ACROSS ALL NATIONAL PARKS

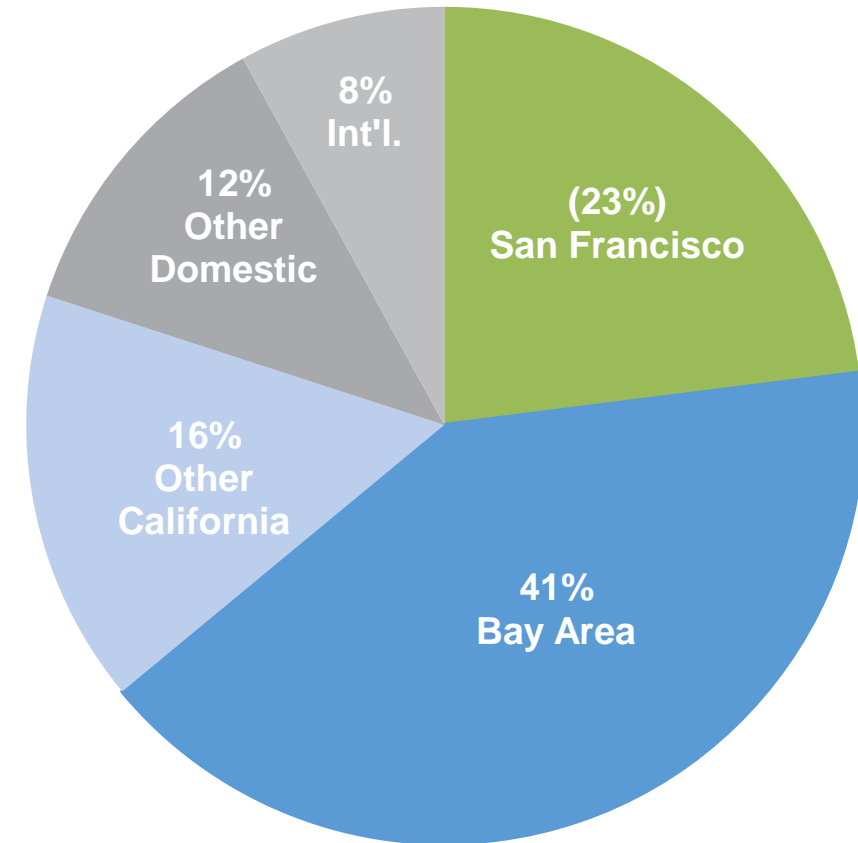
*According to the National Park Service, total visitation across all US national parks declined on average of 28% in 2020.*



## IN 2020 WE GAINED VISITORS FROM THE BAY AREA, WHEREAS OTHER GROUPS DECLINED DUE TO THE PANDEMIC

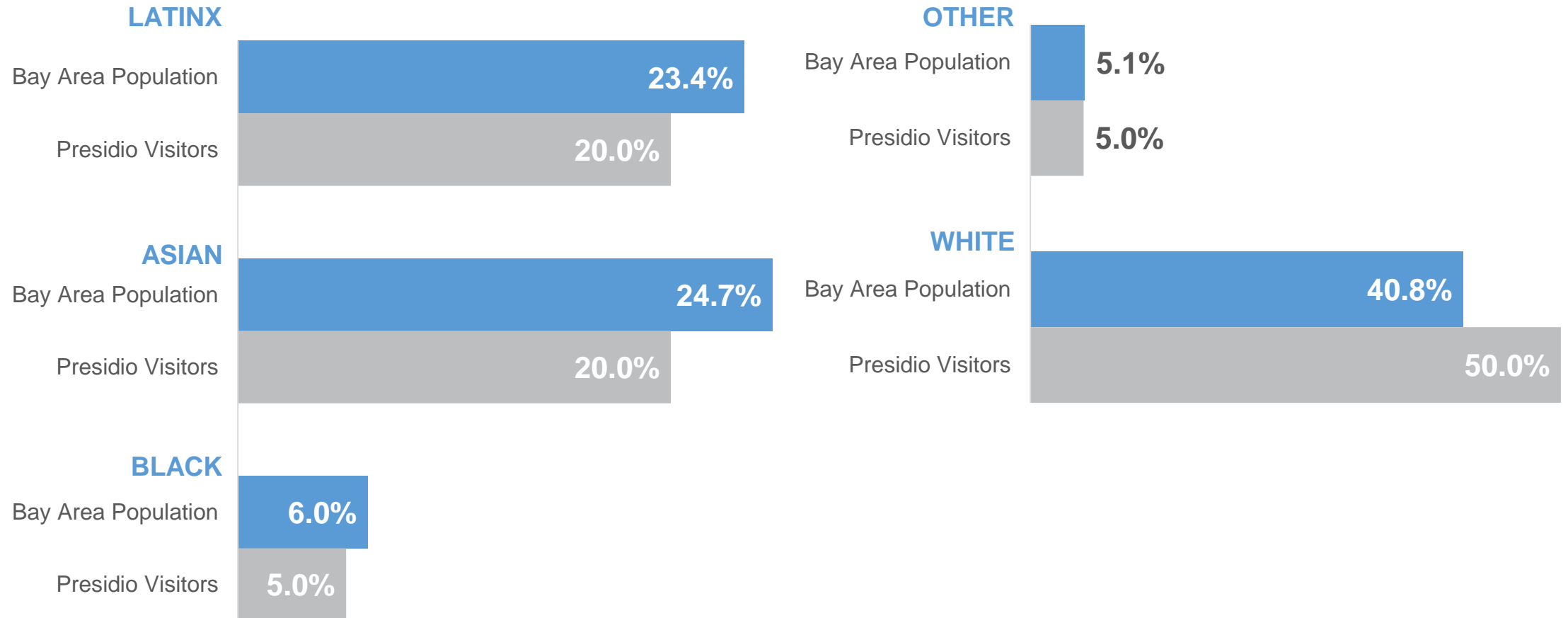


2019

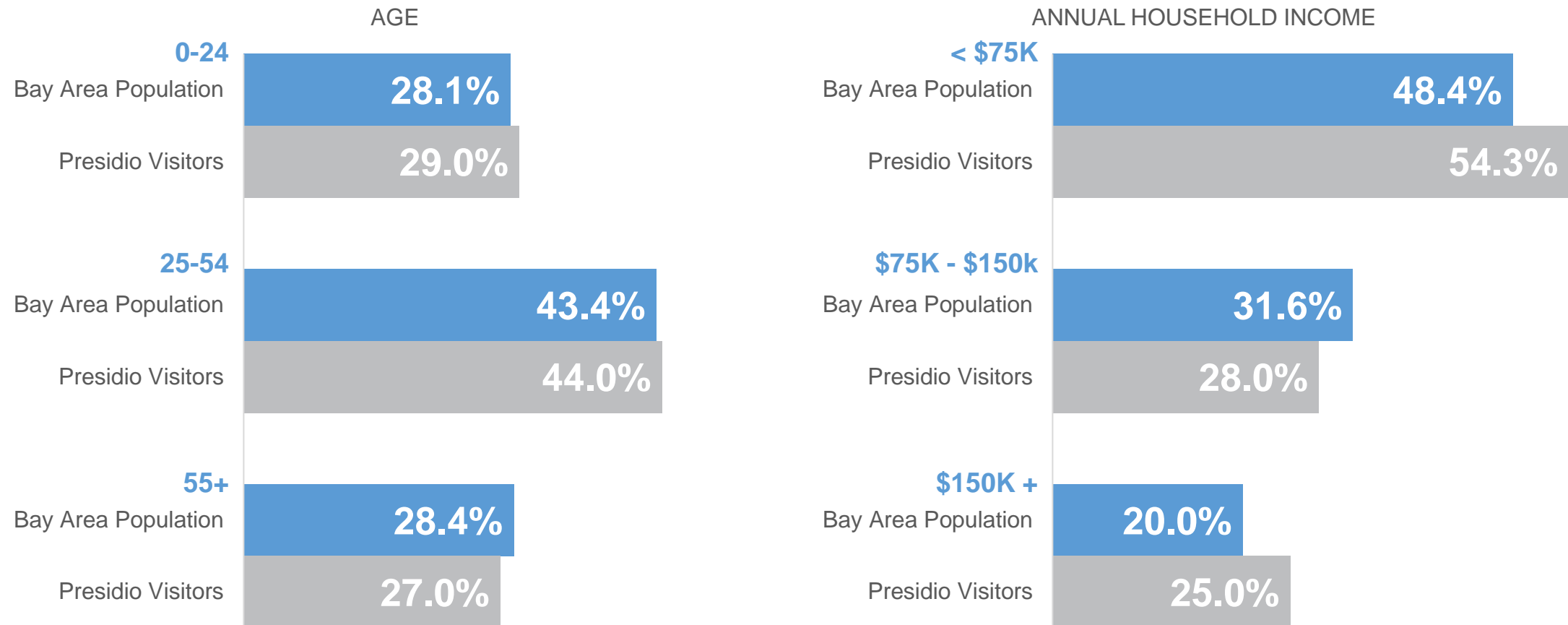


2020

# PRESIDIO VISITORS CONTINUE TO REPRESENT THE BAY AREA DEMOGRAPHICS



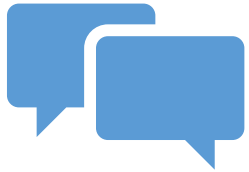
# PRESIDIO VISITORS CONTINUE TO REPRESENT THE BAY AREA DEMOGRAPHICS



\* In 2020, visitation patterns are consistent with California and San Francisco shutdown orders; Source: Tourism Economics, Volume and Demographics Report, 2021

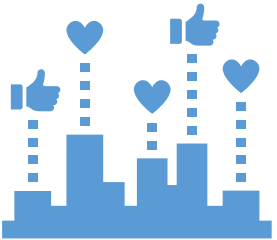
# AWARENESS & SATISFACTION LEVELS

# MOST BAY AREA RESIDENTS ARE AWARE OF THE PRESIDIO AND FEEL WELCOME



When asked, many Bay Area residents are aware of the Presidio.

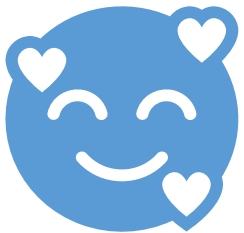
81.9%



How likely are you to recommend the Presidio as a place to visit to friends/family members?

6.7 / 10

(Mean Score on 10pt Scale)



Feels the Presidio is a welcoming place for them.

71.8%

(Base: All respondents, 1,200 responses)

\* In 2020, visitation patterns are consistent with California and San Francisco shutdown orders; Source: Destinations Analysts, Awareness Attitudes and Understanding Study, 2021

# THE PRESIDIO'S DISTINCTION AS A NATIONAL PARK SITE INCREASES INTEREST IN VISITATION

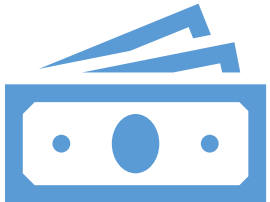
THE PRESIDIO'S UNIQUE FUNDING MODEL INCREASES INTEREST IN SUPPORTING PARK AND TENANT BUSINESSES



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

**45.3% IMPROVED**

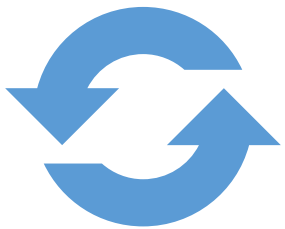
**52.8% NEUTRAL**



The Presidio's unique funding model increases interest in supporting park and tenant businesses.

**53.7% MORE LIKELY**

**43.8% NEUTRAL**



Visited the Presidio two or more times.

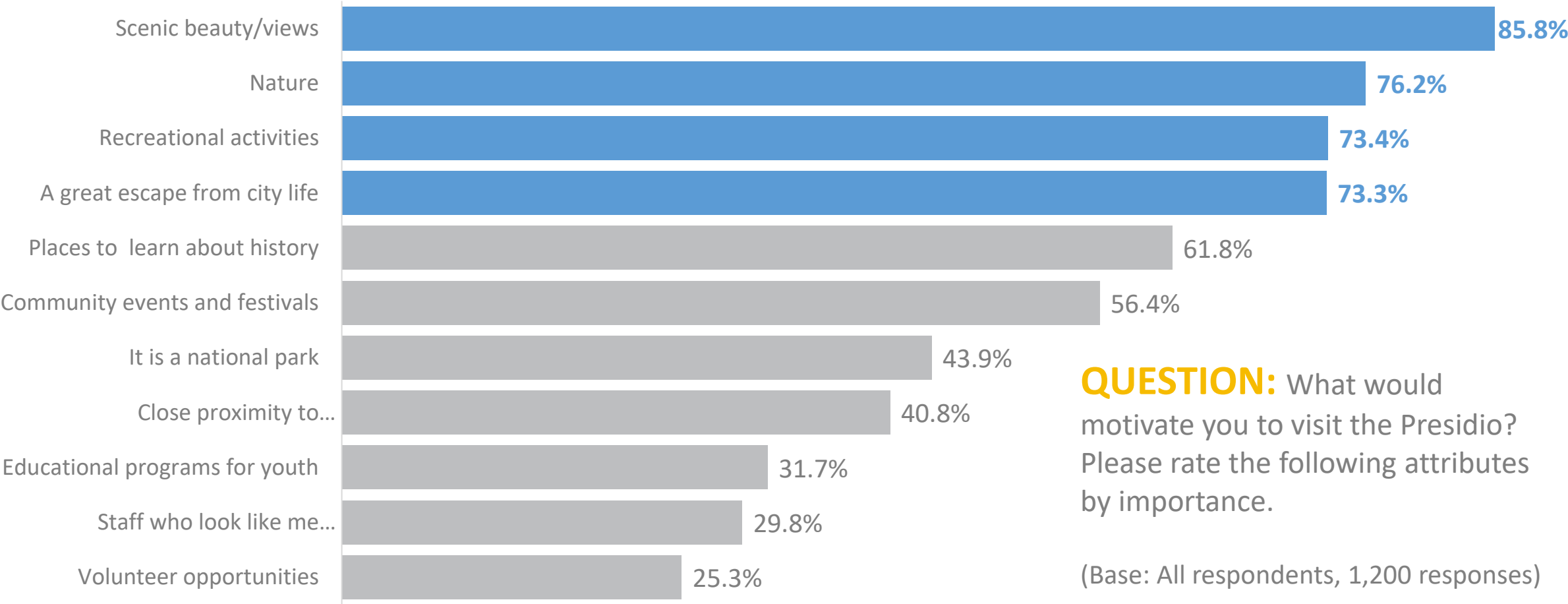
**87.6%**

Includes 47.9% who have visited within the last year

(Base: All respondents, 1,200 responses)

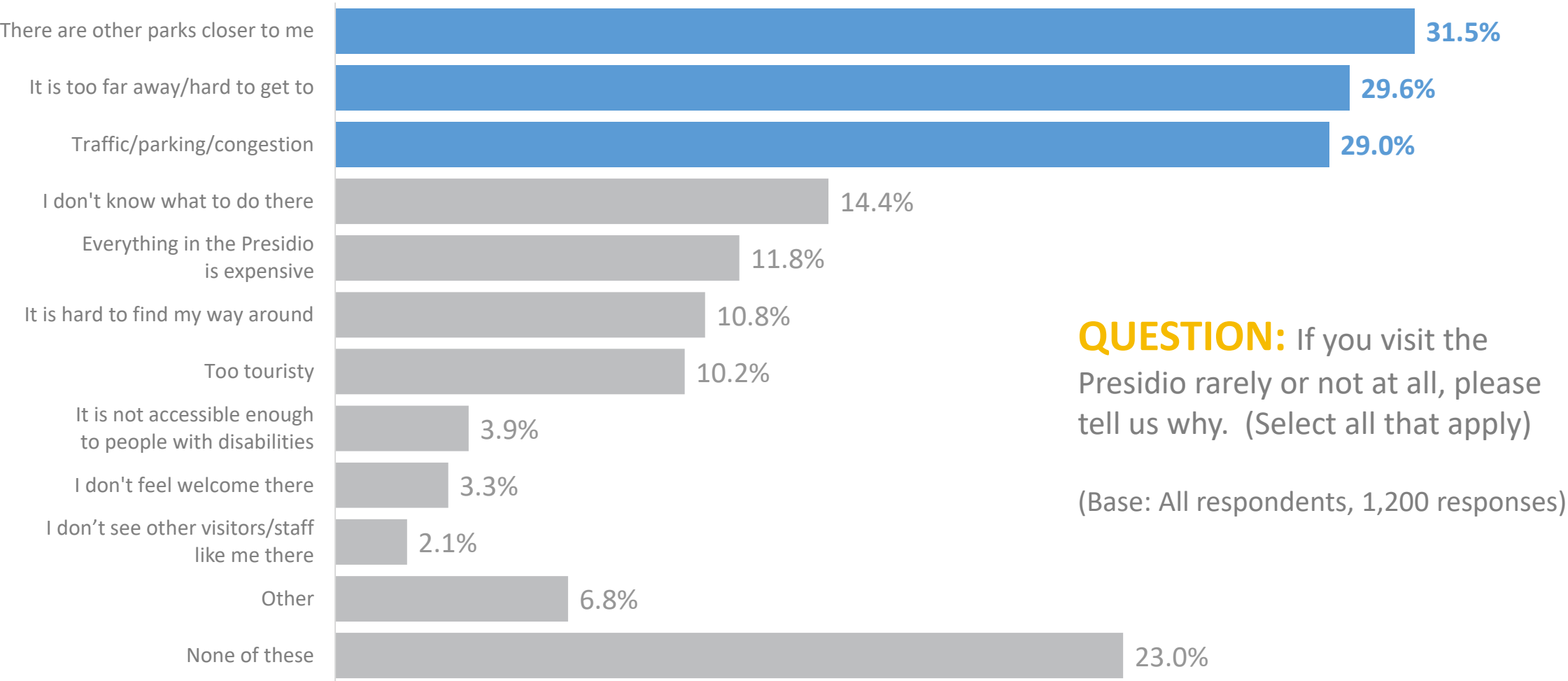
\* In 2020, visitation patterns are consistent with California and San Francisco shutdown orders; Source: Destinations Analysts, Awareness Attitudes and Understanding Study, 2021

# THE PRESIDIO'S SCENIC BEAUTY, NATURE, RECREATONAL ACTIVITIES + ESCAPE FROM CITY LIFE ARE TOP MOTIVATORS FOR PEOPLE TO VISIT



\* In 2020, visitation patterns are consistent with California and San Francisco shutdown orders; Source: Destinations Analysts, Awareness Attitudes and Understanding Study, 2021

# THE TOP DETERENTS FOR VISITING THE PARK ARE: THERE ARE OTHER PARKS CLOSER, PARKING AND TRAFFIC



\* In 2020, visitation patterns are consistent with California and San Francisco shutdown orders; Source: Destinations Analysts, Awareness Attitudes and Understanding Study, 2021



# MARKETING THE PRESIDIO

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# PRESIDIO PARK MARKETING FOR 2020

Media, including Ethnic Media Outlets  
*2.3 billion media impressions*

Email Newsletter  
*26,864 subscribers*

Social Media  
*47,748 followers on Facebook and Instagram*

Presidio.gov Website  
*1,145,398 page views*

Advertising Partners  
*SF Travel, Visit CA, SFMTA*



# COMMUNITY ENGAGEMENT

ACTIVITIES IN THE PRESIDIO, AROUND SAN FRANCISCO, AND VIRTUALLY



# THE PRESIDIO PARTNERS WITH 100+ COMMUNITY ORGANIZATIONS TO WELCOME NEW VISITORS



KOREAN  
CENTER, INC



BOOKER T. WASHINGTON  
COMMUNITY SERVICE CENTER



CITY AND COUNTY OF SAN FRANCISCO  
HUMAN SERVICES AGENCY



Bayview  
Senior Services



WU YEE  
Children's Services  
護兒兒童服務



San Francisco  
Public Library



# FEEDBACK FROM THE COMMUNITY

## QUOTES FROM KEY COMMUNITY LEADERS

*The Presidio is a place where you can breathe freely and be yourself with no judgement. It is a place for families and people to come together for unity and peace of mind.*

**RHONDA HALEY**

Bay View Commons Apartments



*When I first started doing this people would say, "Oh yeah, the Presidio, I know it's there, but it's way on the other side of town. We don't really feel that welcome anyway." But this program makes them feel like someone wants them there. Using the shuttle to get them out and giving them a great time really means a lot.*

**MAXINE TATMON-GILKERSON**

Rafiki Coalition



*Getting out and seeing open space in the Presidio can have an effect on the human body and mind. It's absolutely amazing.*

**VICTOR TONG**

APA Chinatown Family Support Services



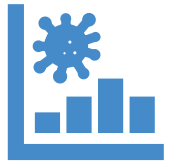
*"Parks for all" is exactly what it sounds like. It doesn't matter your race, your ethnicity, your sexual orientation - this is a place for everyone.*

**MARQUIS ENGLE**

Flourish Agenda

# KEY TAKEAWAYS

# VISITATION TO THE PRESIDIO WAS SEVERELY AFFECTED BY THE COVID-19 PANDEMIC



In 2020, visitation to the Presidio dropped to 6.3 million due to COVID-19 restrictions.

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Many people know of the Presidio.

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Visitation from Bay Area residents increased 8% to 2.5 million visits in 2020.

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The Presidio's affiliation with the national park system and unique funding model improves people's interest in visiting and supporting park businesses.

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The demographic profile of Presidio visitors more closely reflects the diversity of the Bay Area.

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The top motivators to visit are our scenic beauty and views.

# THANK YOU

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# APPENDIX

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# NEWS ABOUT RECENT POPULATION TRENDS AND ADDITIONAL CONTEXT

San Francisco Chronicle, [These San Francisco neighborhoods saw biggest exodus during pandemic](#), Apr. 10, 2021

- In 2020, SF zip codes that saw the biggest increase in move-outs includes 94108 (parts of Chinatown and Nob Hill), 94104 (Financial District), 94123 (Marina), and 94122 (Inner Sunset)

San Francisco Chronicle, [These ZIP codes saw a spike in residents from San Francisco during the pandemic](#), Mar. 22, 2021

- “Additionally, ZIP code 94123, representing the Marina and Cow Hollow, had about 150% more move-outs in March-November 2020 than the same period last year, as did ZIP code 94122 in the Inner Sunset. Both ZIP codes are above the city’s median density.”

California Policy Lab, [CalExodus: Are people leaving California?](#), Mar. 4, 2021

- “Recent news preliminary data, and anecdotes suggest the COVID-19 pandemic is either causing or accelerating an exodus from California. The extent, and whether it proves to be temporary or permanent, is not yet clear, — at least not in data sources traditionally used to quantify residential mobility.”

Los Angeles Times, [Californians aren’t leaving the state en masse – but they are leaving San Francisco, study says](#), Mar. 4, 2021

- Net exits from San Francisco in the last nine months of 2020 increased 649% compared with the same period in 2019, from 5,200 net exits to 38,800, according to new findings from the California Policy Lab.

San Francisco Chronicle, [California's reported hate crimes surged 31% in 2020. Race-based attacks drove the increase](#), Jun. 30, 2021

- The number of reported hate crimes in the state has seen a 31% overall increase in 2020, particularly in race-based hate crimes where hate crimes against the Asian community surged by 107%, an 87% increase on anti-Black bias events, and a 110% increase on anti-white bias events, according to the data.

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# NEWS ABOUT RECENT POPULATION TRENDS AND ADDITIONAL CONTEXT

KRON4, [Exodus: Study reveals dramatic San Francisco population change](#), Mar. 4, 2021

- According to California Policy Lab, 61.3% more people left San Francisco during the first quarter of 2020 compared to last quarter of 2019 – and 24.6% fewer people moved in during that period compared to the prior year. 80% of the San Francisco migrants remained in California.
- As seen, neighboring San Mateo County is the second most-fled county in the Bay Area, but San Francisco's rates still far surpass San Mateo's increase of 28.6% more exits in 2020 compared to 2019.

San Francisco Chronicle, [The Bay Area migration has turned the Central Valley into a suddenly hot housing market](#), Mar. 9, 2021

- Data from the USPS backs up the claim that the out migration from the Bay Area to San Joaquin County is picking up. Between March and November of 2020, at least 6,320 households moved to ZIP codes in San Joaquin County from one of these Bay Area counties: Alameda, Contra Costa, San Mateo, Santa Clara, San Francisco and Marin. That's a 22% increase over 2019.

KTVU FOX2, [USPS data reveals households fled San Francisco during pandemic, but didn't go far](#), Feb. 17, 2021

- The USPS's analysis of address change requests shows nearly 80,000 San Francisco households moved out of the city during the pandemic so far, while 27,000 households moved in; a net loss of 53,000. But, some 28,000 households moved to another Bay Area county and another 4,000 stayed in California.

San Francisco Chronicle, [Yosemite dropped out of the top 10 list of most visited national parks. Here's why](#), Mar. 11, 2021

- In California, the number of visitors to Yosemite National Park in the Sierra Nevada dropped nearly half in 2020, with 2.2 million visitors compared to 4.4 million in 2019. The park did not make the list after being the fifth-most-visited in 2019.

# SOURCES

**Slide 6:** NPS Visitation Numbers, National Park Service, 2021

**Slide 7:** Presidio Trust Statistics, 2021

**Slide 15:** Visitation Data Collection Report, Tourism Economics, 2021

**Slide 16:** Visitation Data Collection Report, Tourism Economics, 2021

**Slide 17:** Visitation Data Collection Report, Tourism Economics, 2021; NPS Visitation Numbers, National Park Service, 2020

**Slide 18:** Visitation Data Collection Report, Tourism Economics, 2021

**Slide 19:** Visitation Data Collection Report, Tourism Economics, 2021

**Slide 20:** Visitation Data Collection Report, Tourism Economics, 2021

**Slide 22:** Visitation Data Collection Report, Tourism Economics, 2021

**Slide 23:** Visitation Data Collection Report, Tourism Economics, 2021

**Slide 24:** Attitude and Awareness Survey, Destination Analysts, 2021

**Slide 25:** Attitude and Awareness Survey, Destination Analysts, 2021