

# 2022 Presidio Visitor Profile Report

**September 13, 2023**

**PRESIDIO  
TRUST**



# 2022 PRESIDIO VISITOR PROFILE REPORT





A Big Year for Visitation!



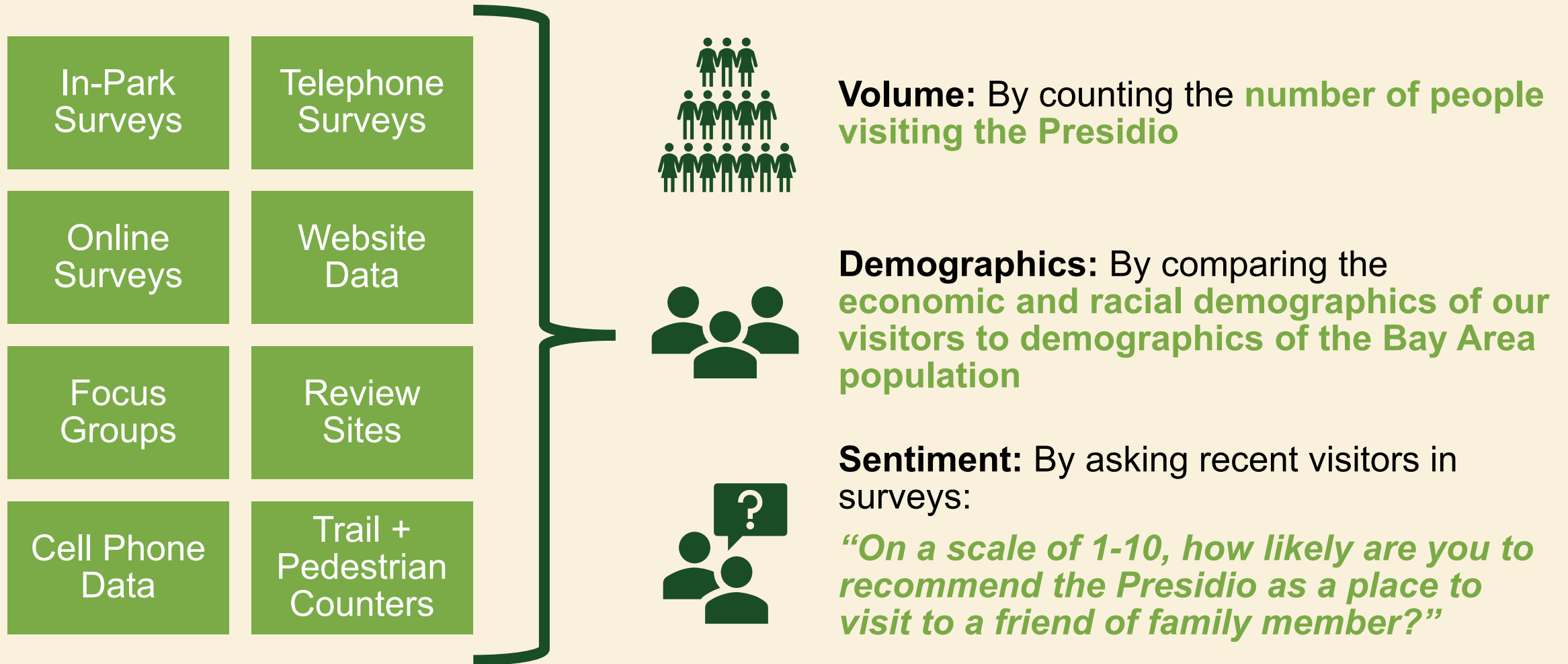


# PARTNERSHIP FOR THE PRESIDIO





# How We Know We Are Making Progress On Our Visitation Goals

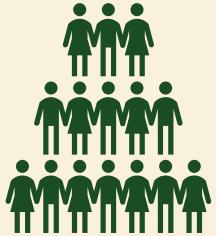


# CHAPTER 1

## 2022 EXECUTIVE SUMMARY



# Visitation to the Presidio Nears Pre-Pandemic Levels



**Volume:** By counting the **number of people visiting the Presidio**

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In a year of major new park openings, **visitation to the Presidio rebounds to near pre-pandemic levels at 9.6 million** in 2022.

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**Demographics:** By comparing the **economic and racial demographics of our visitors to demographics of the Bay Area population**

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We continue to make strides in attracting **ethnically diverse and low-income audiences** that reflect Bay Area demographics.

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**Sentiment:** By asking recent visitors in surveys:  
***“On a scale of 1-10, how likely are you to recommend the Presidio as a place to visit to a friend or family member?”***

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On a 10-point scale, the **likelihood to recommend the Presidio as a place to visit** increased from 7.6 to 8.3.

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# CHAPTER 2

## 2022 VISITOR PROFILE

- Annual visitation volume and seasonal trends
- Origin of visitors
- Overall awareness, perceptions, motivations and barriers
- Presidio Tunnel Tops volume





# In 2022, Presidio Welcomed 9.6 Million Visitors to the Park

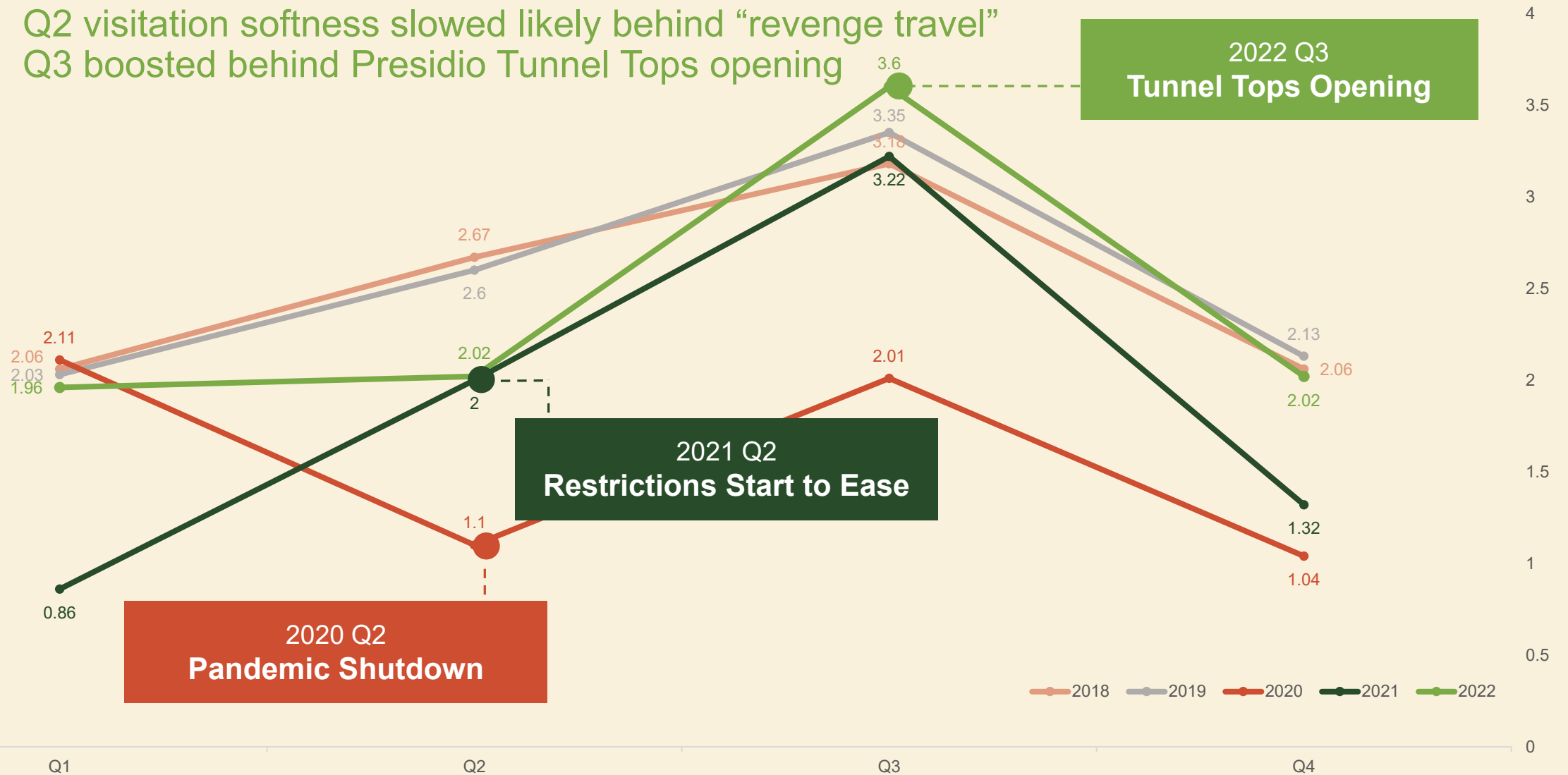
Visitation to the Presidio (2019-2022)

Calendar year



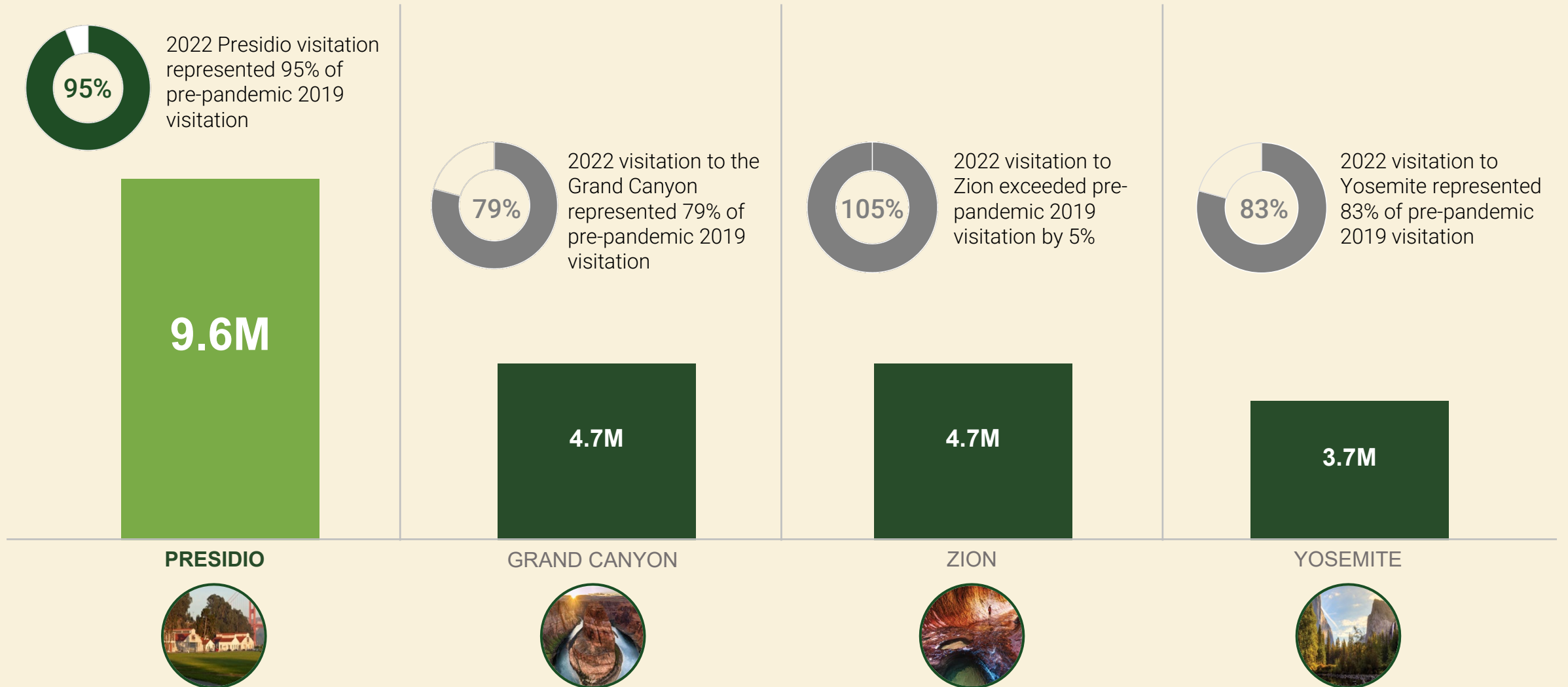
# Seasonal Patterns Return Nearer to Historic Trends

Q2 visitation softness slowed likely behind “revenge travel”  
Q3 boosted behind Presidio Tunnel Tops opening

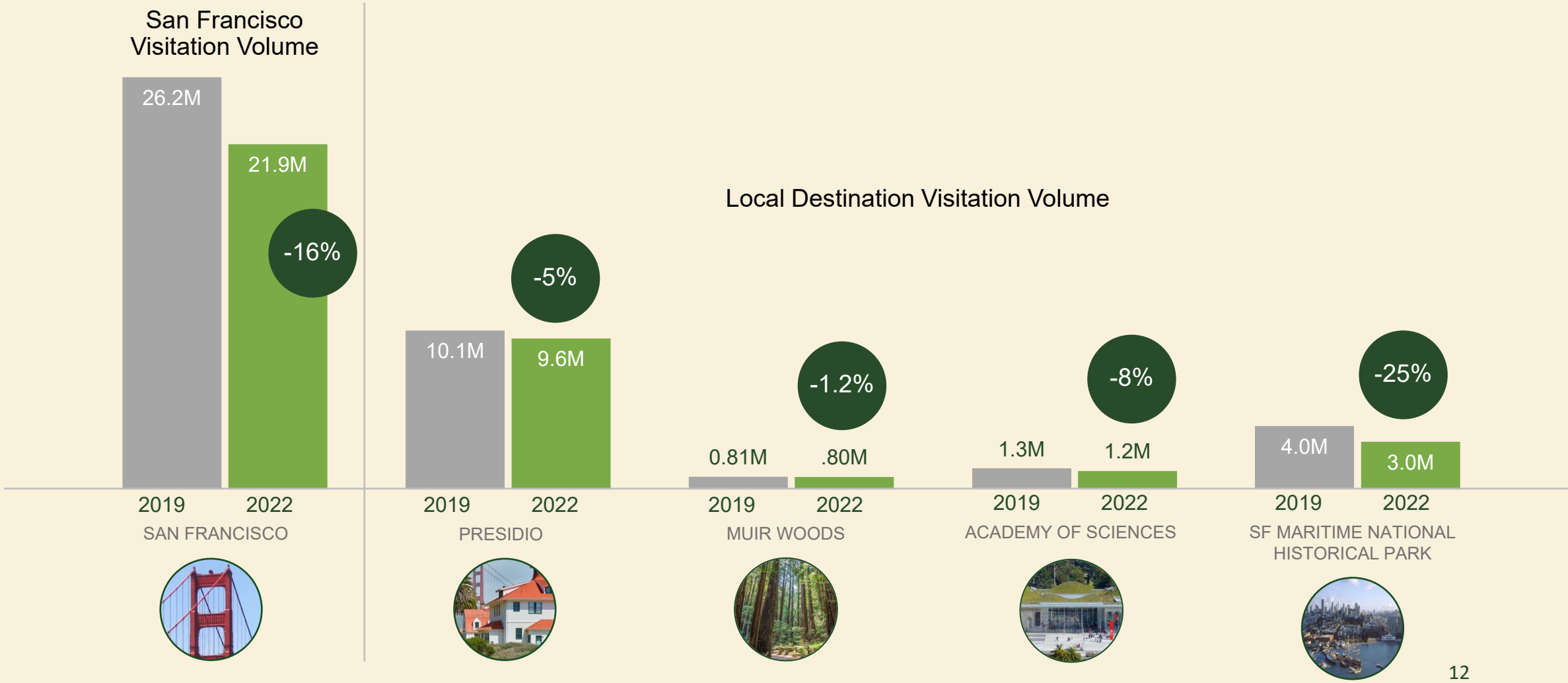




# Presidio Visitation is on Par with the Trends of Overall National Park Recovery Pre-Pandemic



# Presidio Visitation is Outpacing San Francisco Tourism





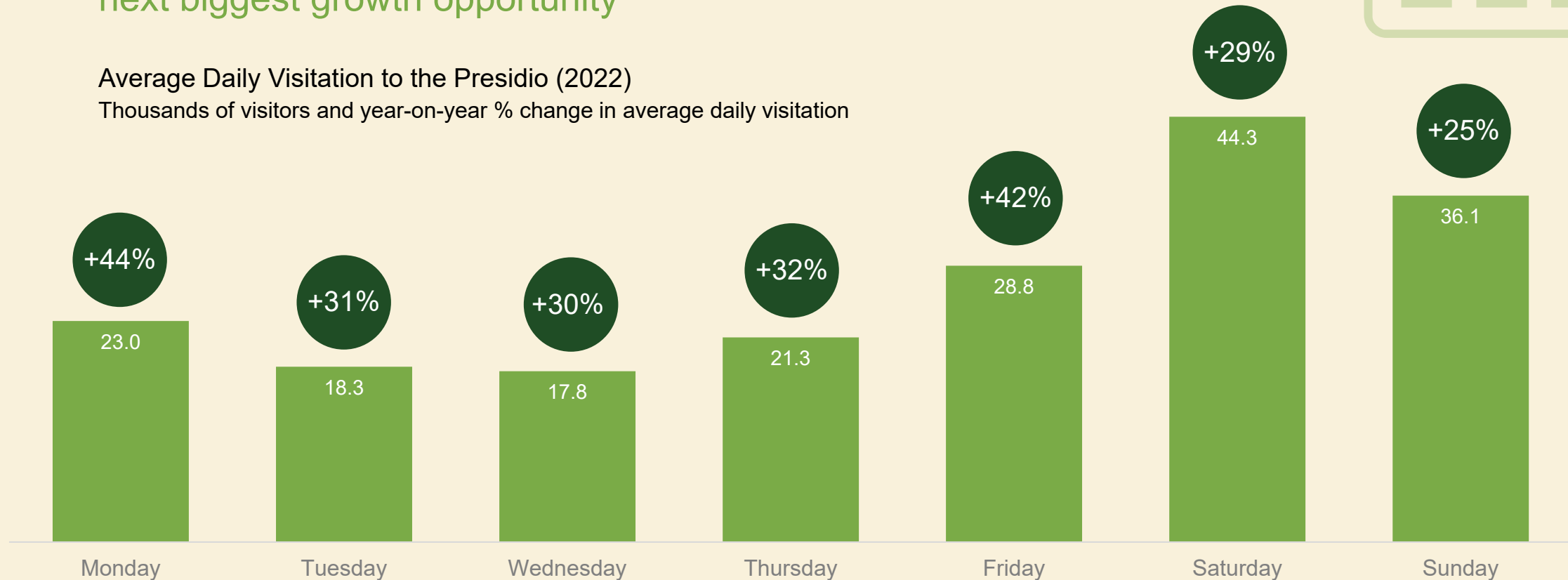
# The Weekends Continue to be the Most Well Attended Days at the Presidio

Friday and Monday show the largest increases in visitation, suggesting the weekend “shoulder” is our next biggest growth opportunity



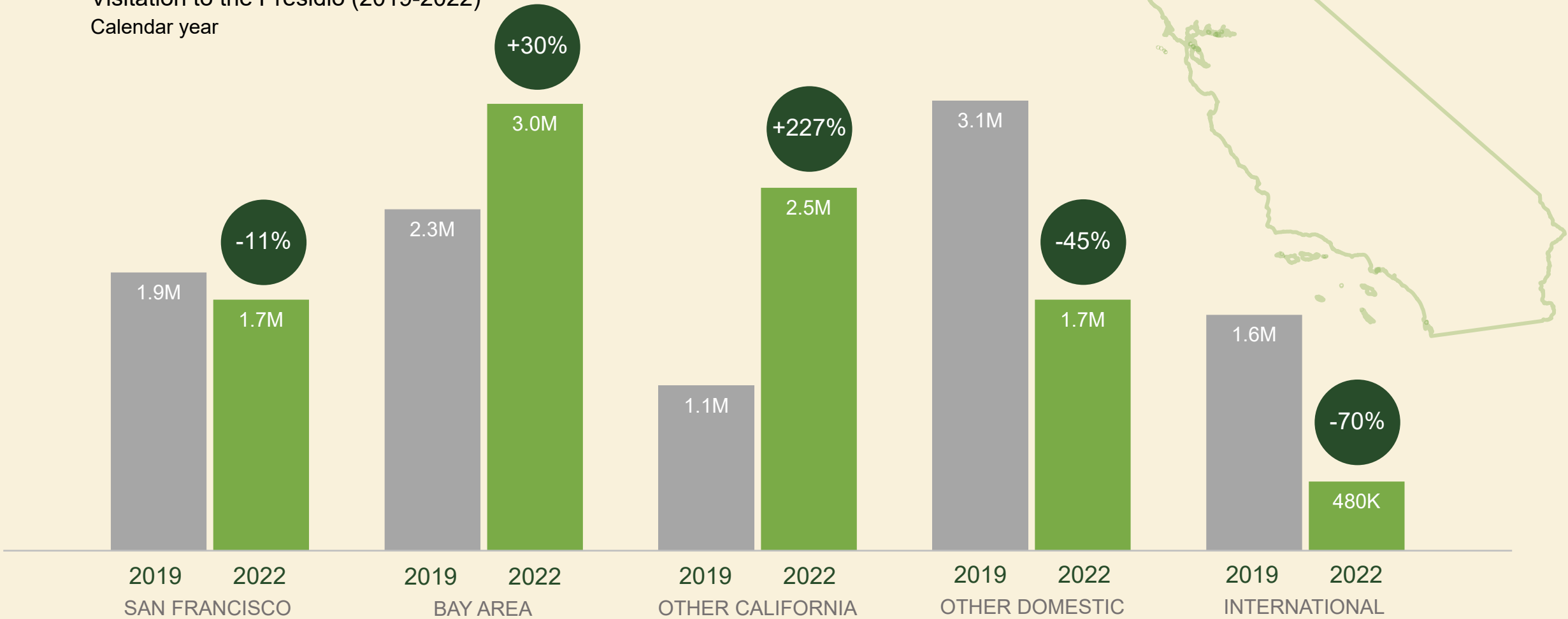
## Average Daily Visitation to the Presidio (2022)

Thousands of visitors and year-on-year % change in average daily visitation



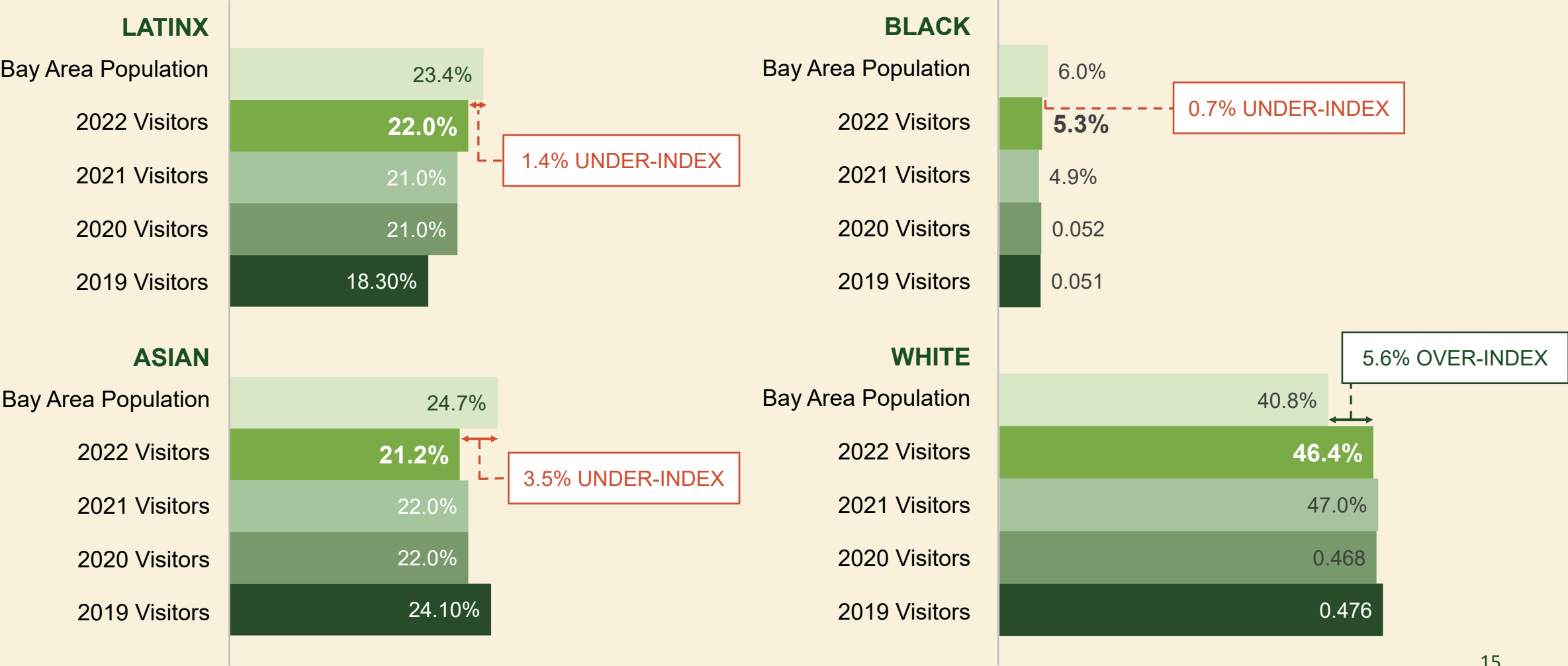
# Bay Area and California Drove Visitation Growth in 2022

Visitation to the Presidio (2019-2022)  
Calendar year

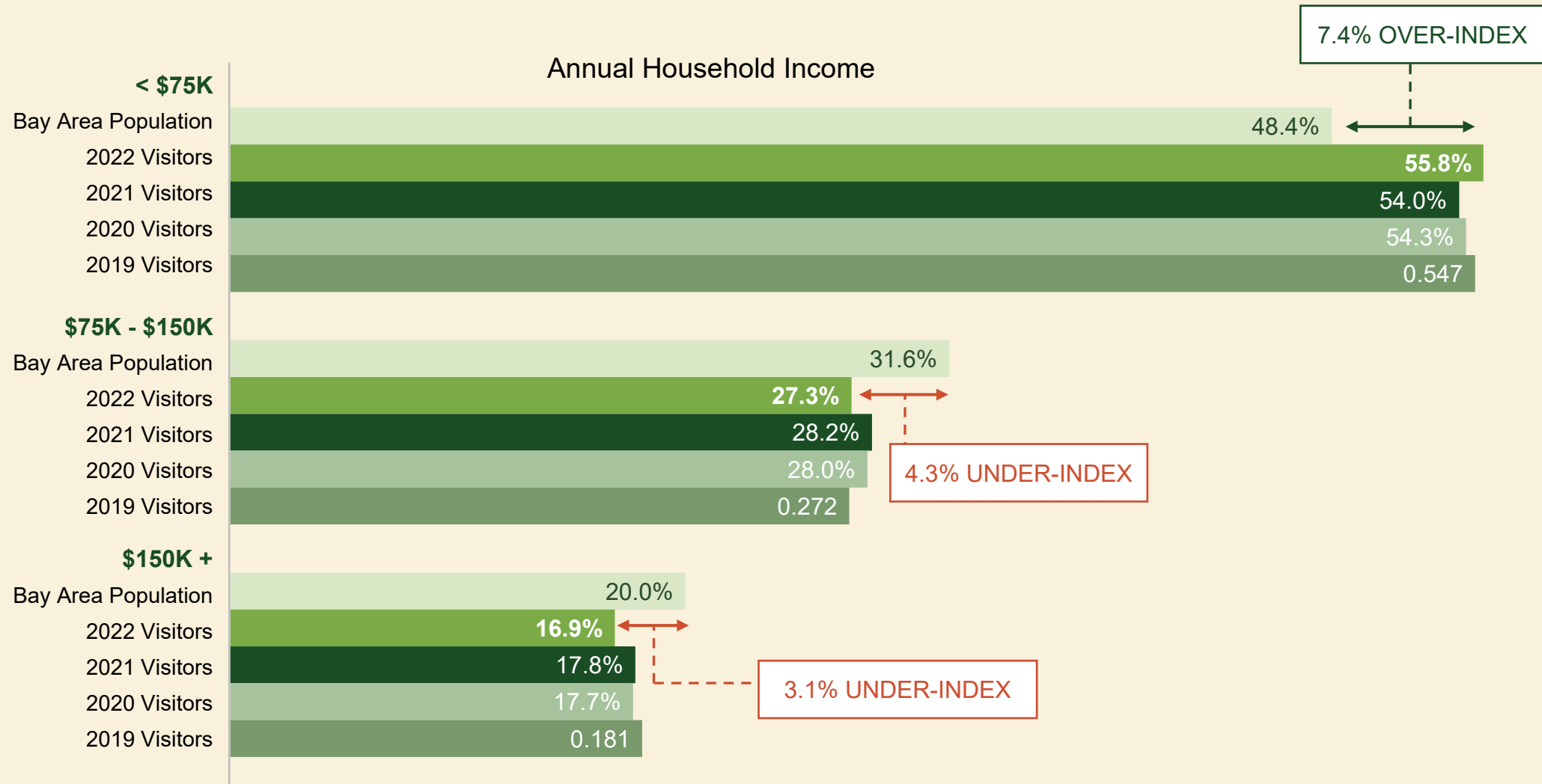




# Presidio Visitation Maps Closely to Bay Area Demographics but there is Room to Improve



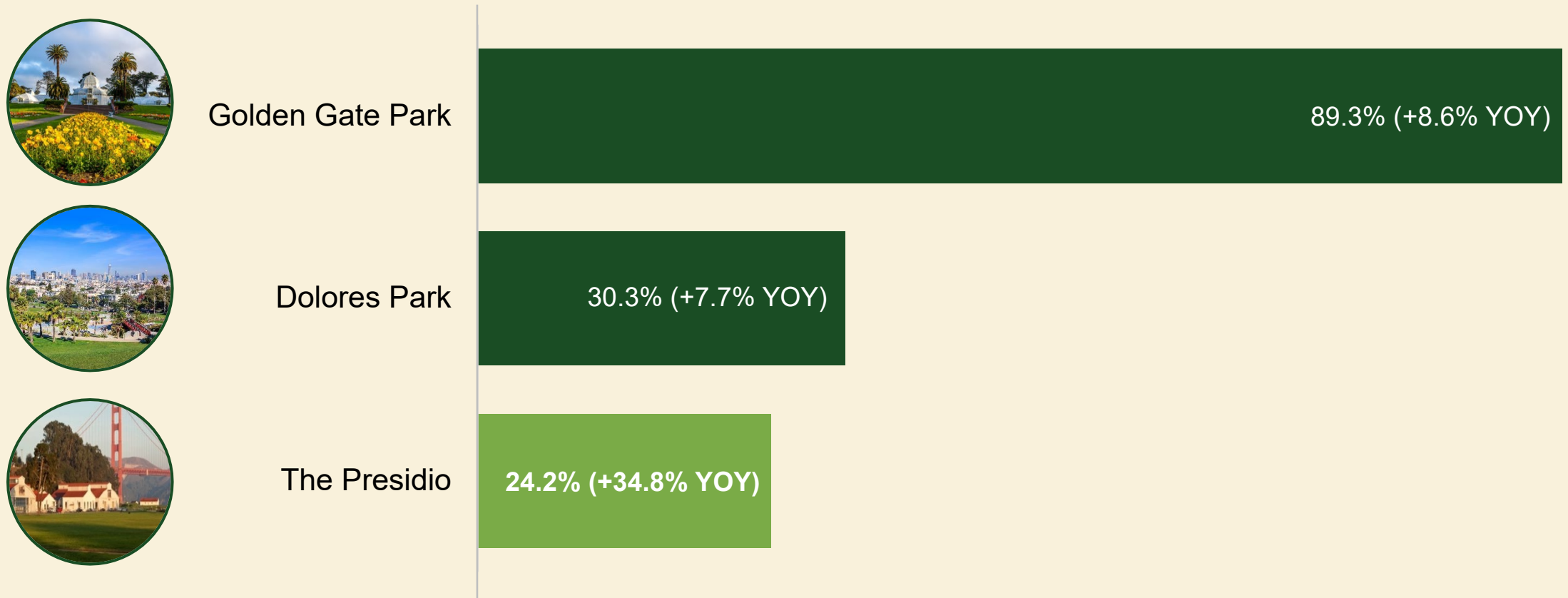
# There is a Large Share of Low-Income Visitors Coming to the Presidio



# Although The Presidio Isn't Top-of-Mind as a San Francisco Park, it Has Made Great Progress Recently

**QUESTION:** When you think of San Francisco, what parks in the city first come to mind? (Unaided)

Base: 1196 responses





# When Prompted, Awareness of the Presidio is High

**QUESTION:** Prior to this survey, which of these San Francisco parks have you heard of? (Aided)

*Base: All respondents, 1200 responses*



Golden Gate Park

94.5% (+4.7% YOY)



The Presidio

84.6% (+8.4% YOY)



Ocean Beach

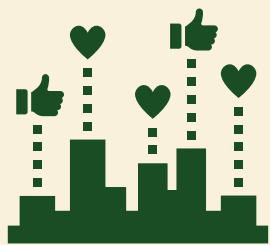
79.4% (+6.9% YOY)

# The Public's Perception of the Presidio Improved in 2022



**Feels the Presidio is a welcoming place for them.**

76.4% (+0.2% YOY)



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

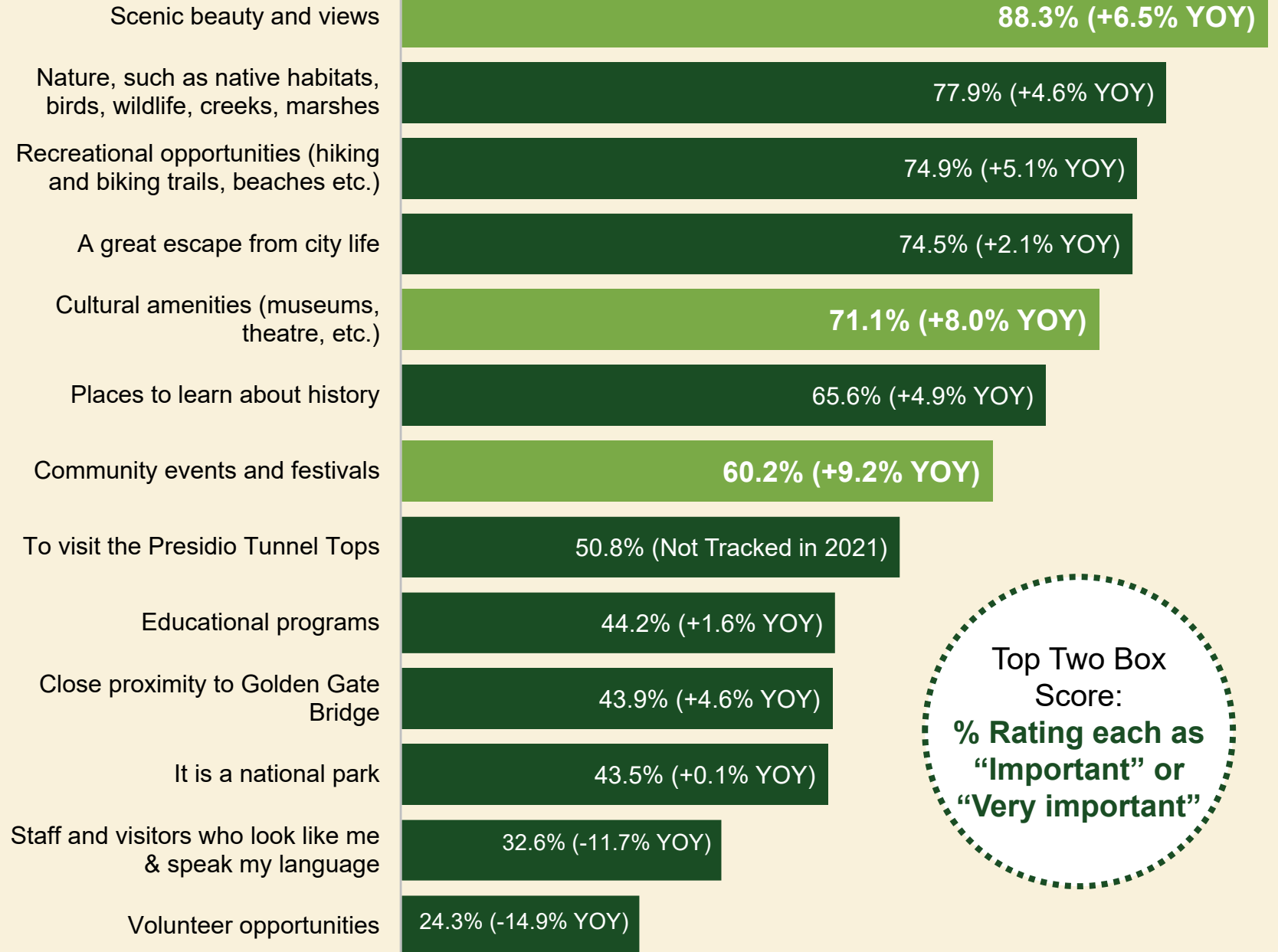
8.3 (+8.4% YOY)

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

# Unique Reasons to Visit the Presidio

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

*Base: All respondents; 1,200 responses.*

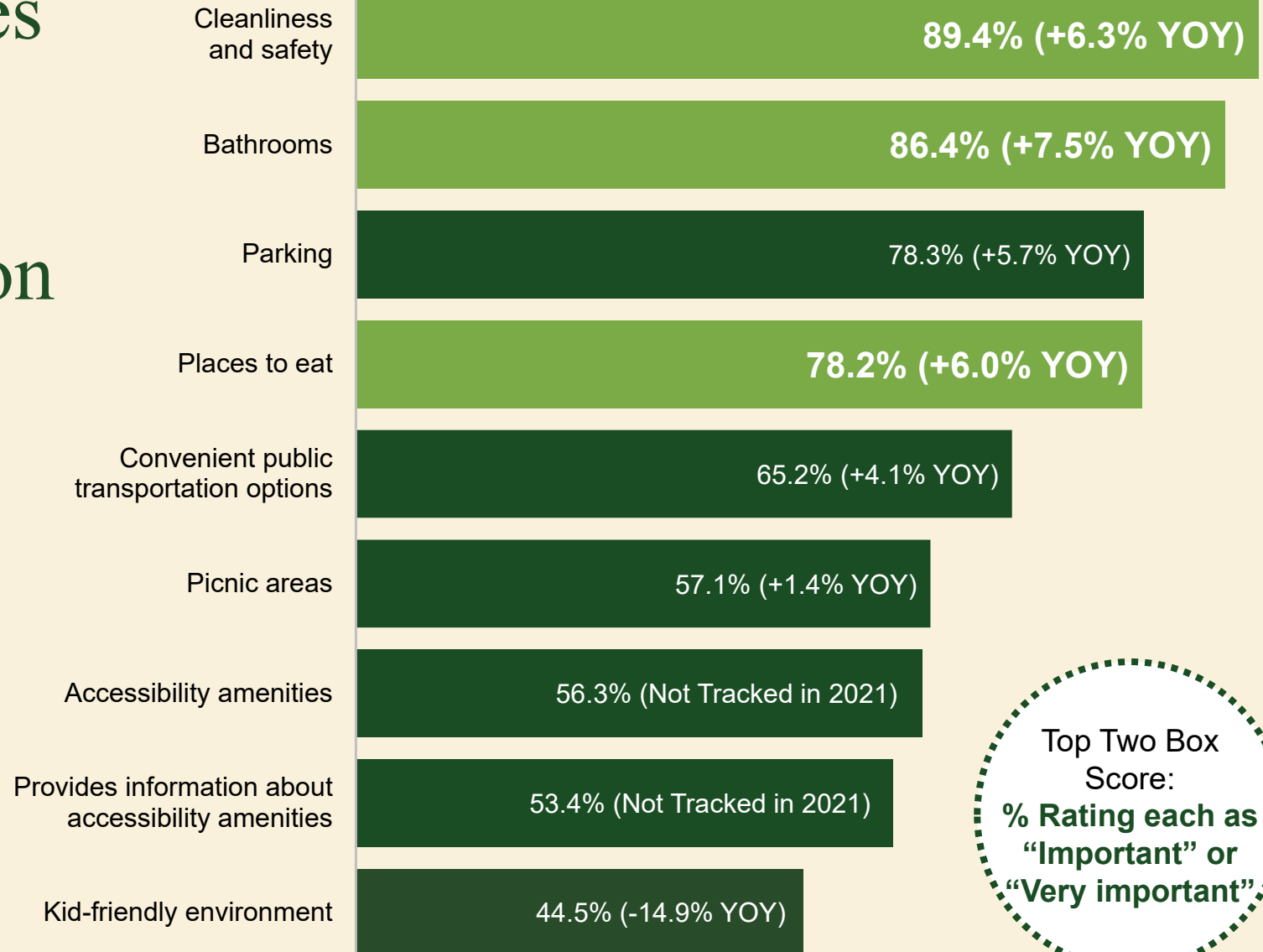




# Important Amenities & Attributes to Supporting Successful Visitation

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

*Base: All respondents; 1,200 responses.*

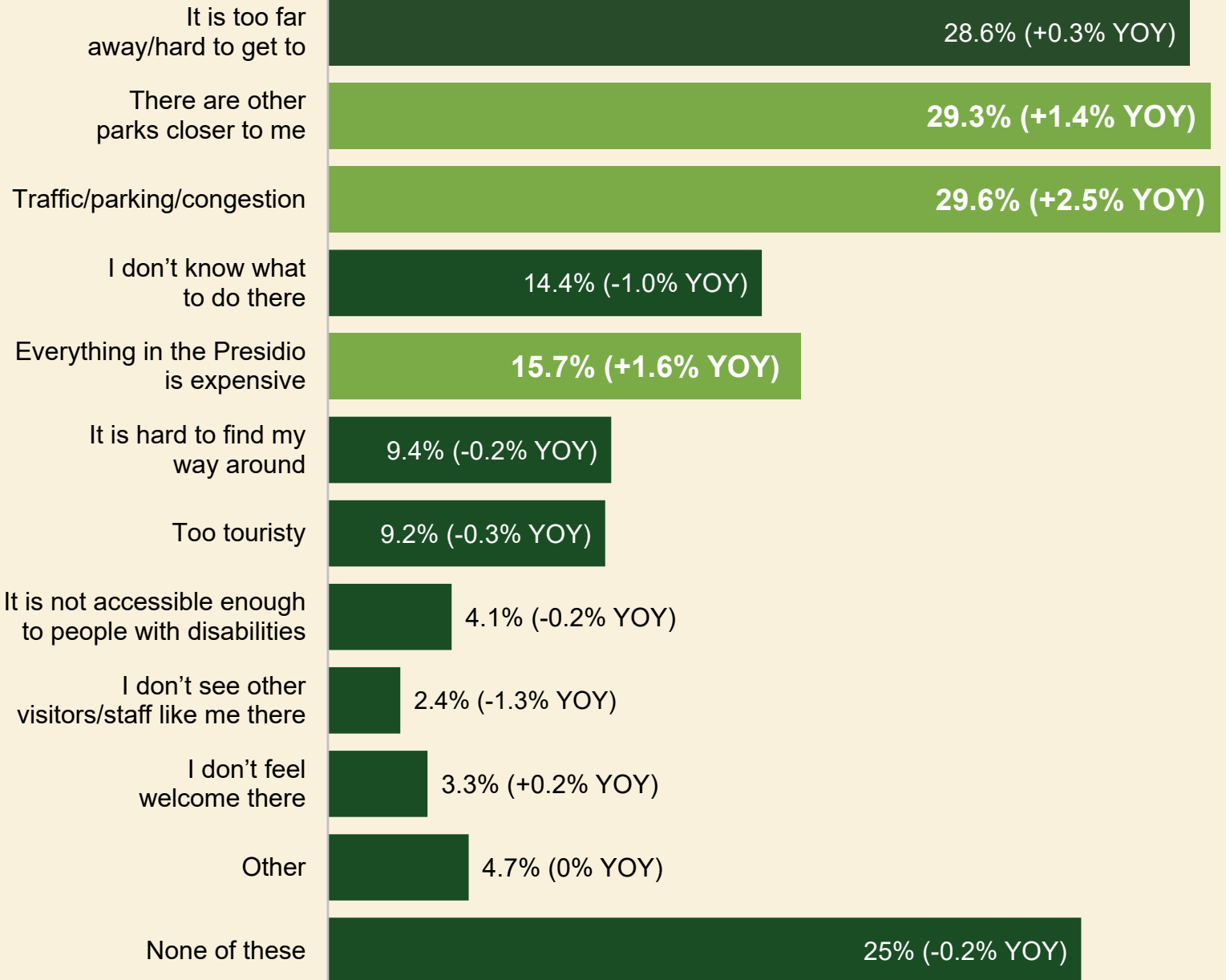


Top Two Box  
Score:  
% Rating each as  
"Important" or  
"Very important"

# 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*







998,351  
visitors

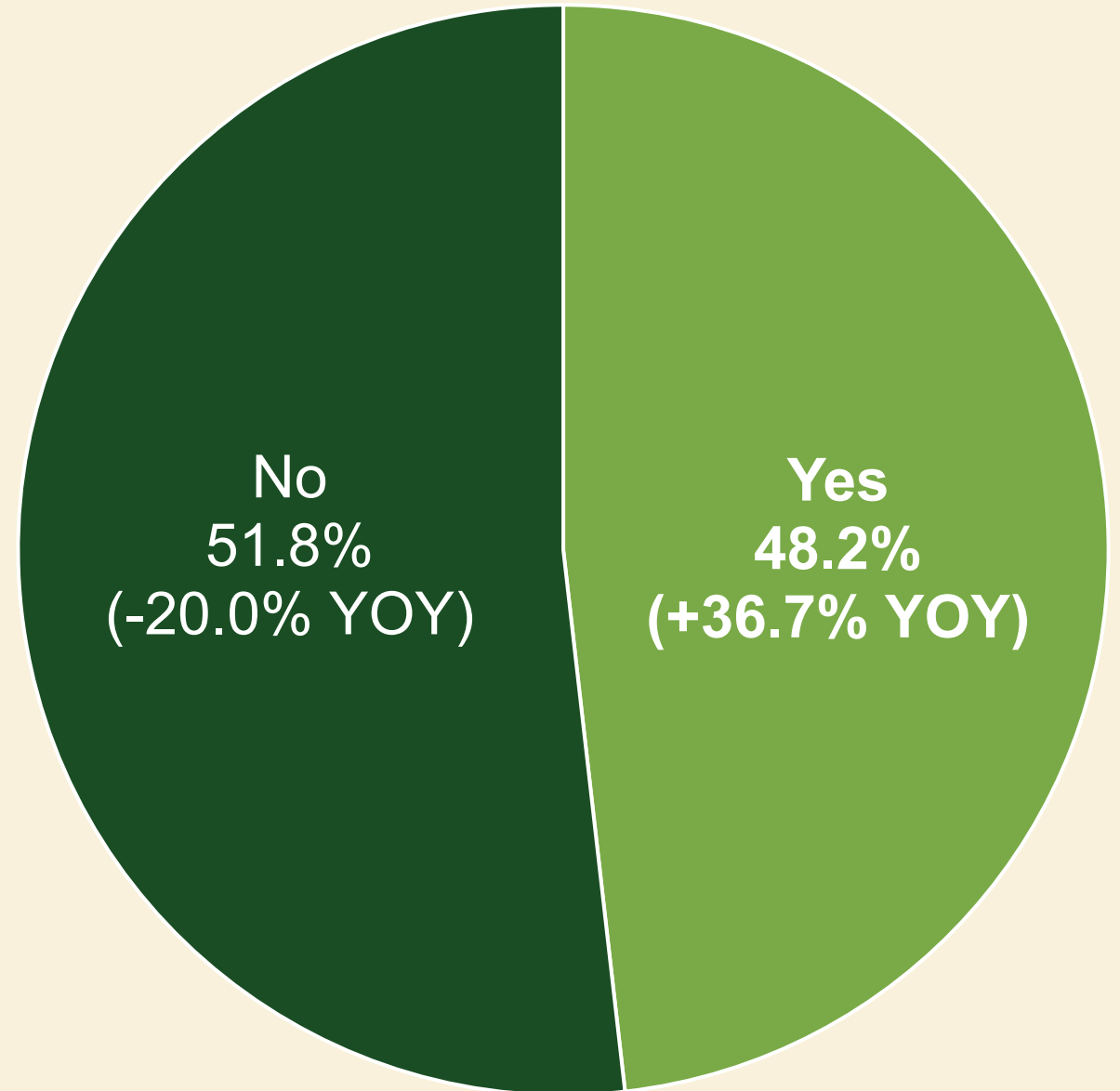
Visitation to Presidio Tunnel Tops (July 27-December 31, 2022)

In 2022, Presidio Tunnel Tops Welcomed Nearly  
1 Million Visitors



# Significantly More SF Bay Area Residents are Aware of Presidio Tunnel Tops this Year

**QUESTION:** Have you heard of the Presidio Tunnel Tops?  
Base: All respondents, 1,200 responses



# Thank You

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