2022 Presidio Visitor Profile Report

September 13, 2023

PRESIDIO TRUST



2022 PRESIDIO VISITOR PROFILE REPORT





PRESIDIO: INSTANTLY ICONIC AND ENDURINGLY APPEALING Brond new: President Trops



















How We Know We Are Making Progress On Our Visitation Goals

In-Park Surveys

Telephone Surveys

Online Surveys Website Data

Focus Groups Review Sites

Cell Phone Data Trail +
Pedestrian
Counters



Volume: By counting the number of people visiting the Presidio



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



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 of family member?"

CHAPTER 1 2022 EXECUTIVE SUMMARY



Visitation to the Presidio Nears Pre-Pandemic Levels



Volume: By counting the number of people visiting the Presidio

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



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

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



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 of family member?"

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

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

2019

10.1M visitors

2019 Visitation Levels: 10.1M Visitors

2020

6.3M visitors

2021

7.4M visitors

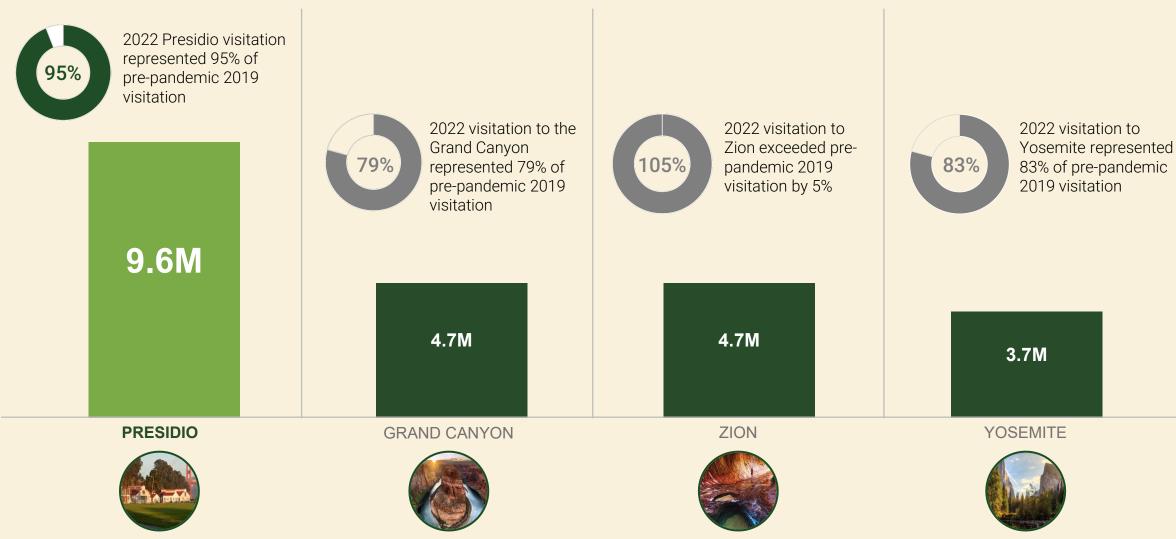
9.6M visitors

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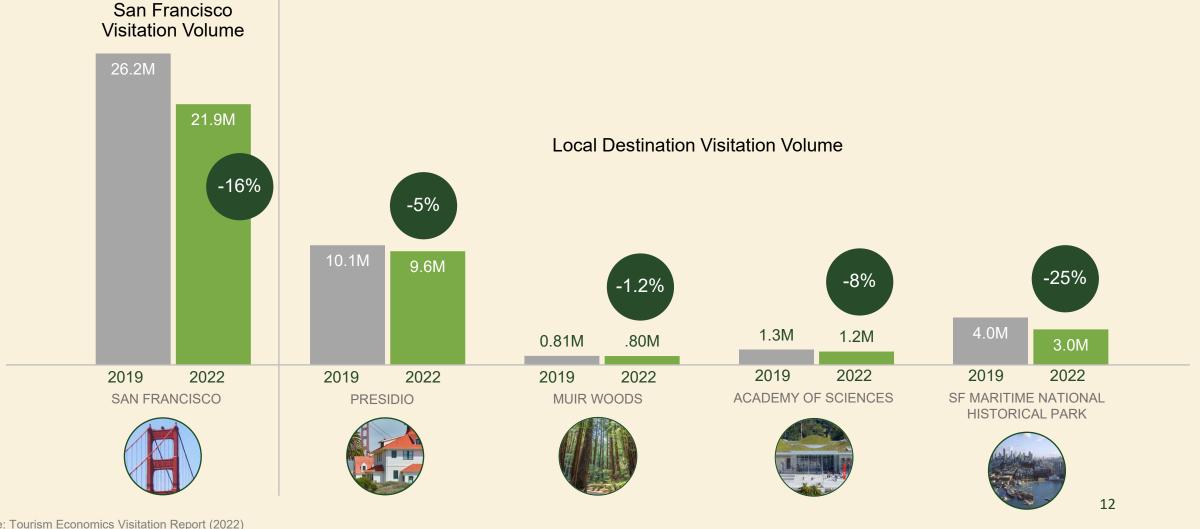
Seasonal Patterns Return Nearer to Historic Trends



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



Presidio Visitation is Outpacing San Francisco Tourism



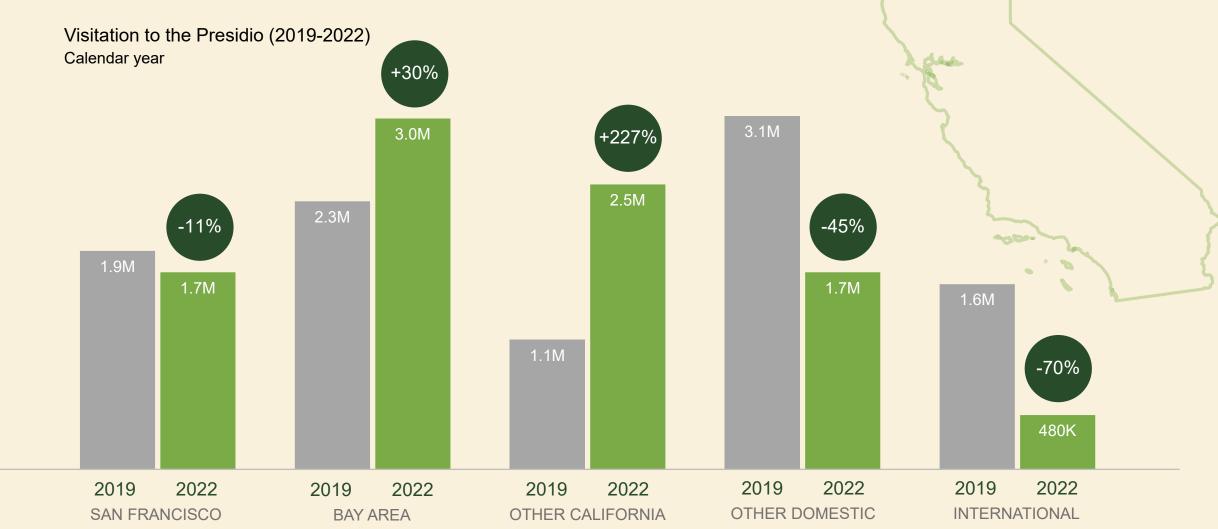
Source: Tourism Economics Visitation Report (2022)

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

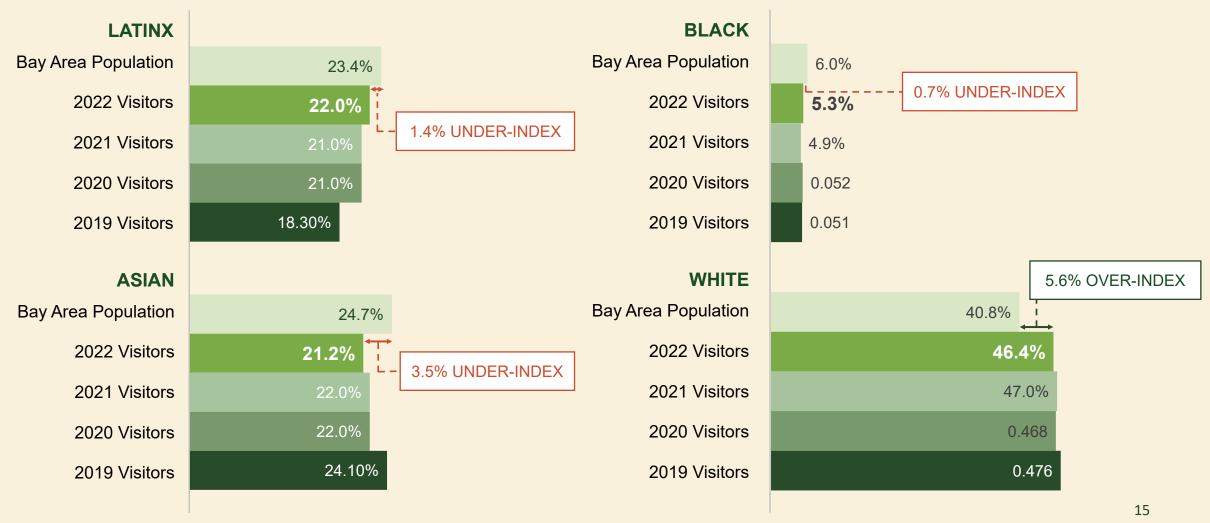
Friday and Monday show the largest increases in visitation, suggesting the weekend "shoulder" is our next biggest growth opportunity



Bay Area and California Drove Visitation Growth in 2022

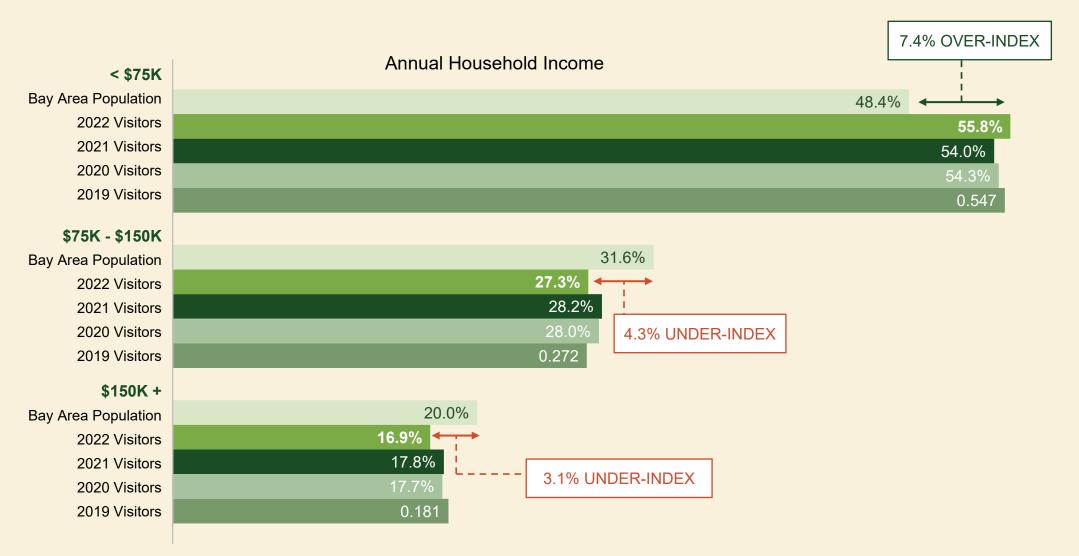


Presidio Visitation Maps Closely to Bay Area Demographics but there is Room to Improve



Source: Tourism Economics Visitation Report (2022)

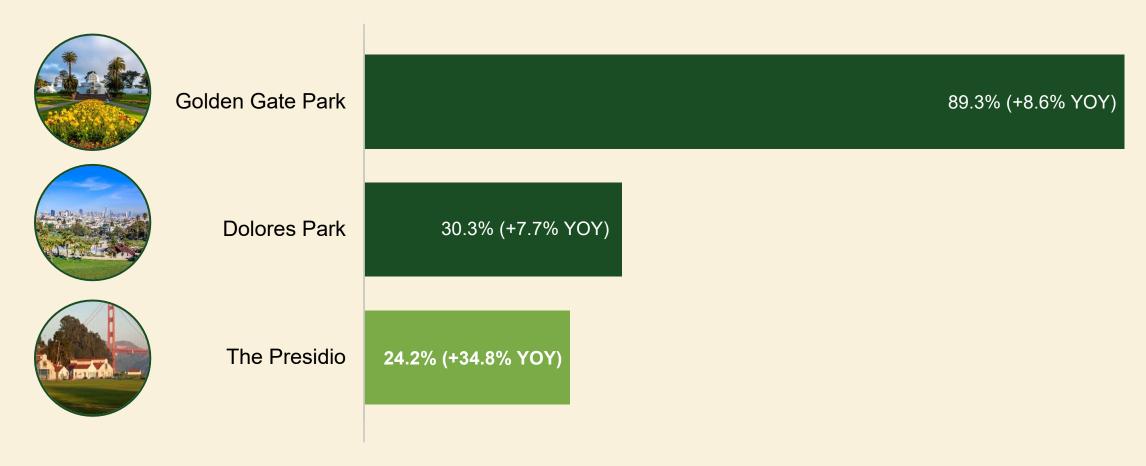
There is a Large Share of Low-Income Visitors Coming to the Presidio



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



The Public's Perception of the Presidio Improved in 2022

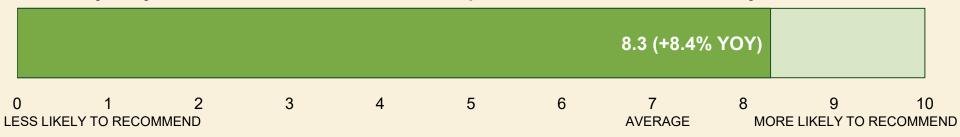


Feels the Presidio is a welcoming place for them.

76.4% (+0.2% YOY)



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



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.

88.3% (+6.5% YOY) Scenic beauty and views Nature, such as native habitats, 77.9% (+4.6% YOY) birds, wildlife, creeks, marshes Recreational opportunities (hiking 74.9% (+5.1% YOY) and biking trails, beaches etc.) A great escape from city life 74.5% (+2.1% YOY) Cultural amenities (museums, 71.1% (+8.0% YOY) theatre, etc.) Places to learn about history 65.6% (+4.9% YOY) 60.2% (+9.2% YOY) Community events and festivals To visit the Presidio Tunnel Tops 50.8% (Not Tracked in 2021) 44.2% (+1.6% YOY) Educational programs Top Two Box Close proximity to Golden Gate 43.9% (+4.6% YOY) Bridge % Rating each as "Important" or It is a national park 43.5% (+0.1% YOY) "Very important" Staff and visitors who look like me 32.6% (-11.7% YOY) & speak my language

Volunteer opportunities

24.3% (-14.9% YOY)

Score:

Important Amenities & Attributes to Supporting Successful Visitation

Cleanliness and safety

Bathrooms

86.4% (+7.5% YOY)

89.4% (+6.3% YOY)

Top Two Box Score:

% Rating each as

"Important" or Very important":

Parking

78.3% (+5.7% YOY)

78.2% (+6.0% YOY)

Places to eat

Convenient public transportation options

Accessibility amenities

accessibility amenities

Kid-friendly environment

Provides information about

Picnic areas

57.1% (+1.4% YOY)

65.2% (+4.1% YOY)

53.4% (Not Tracked in 2021)

44.5% (-14.9% YOY)

56.3% (Not Tracked in 2021)

QUESTION: What would

motivate you to visit the Presidio? Please rate the following attributes by importance.

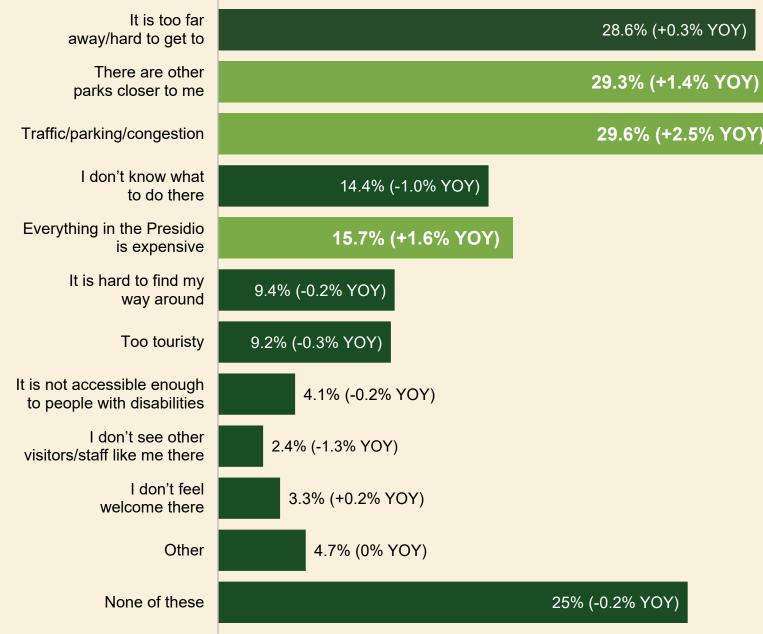
Base: All respondents; 1,200 responses.

Source: Destination Analysts Presidio Awareness Attitudes and Understanding Study (2022)

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





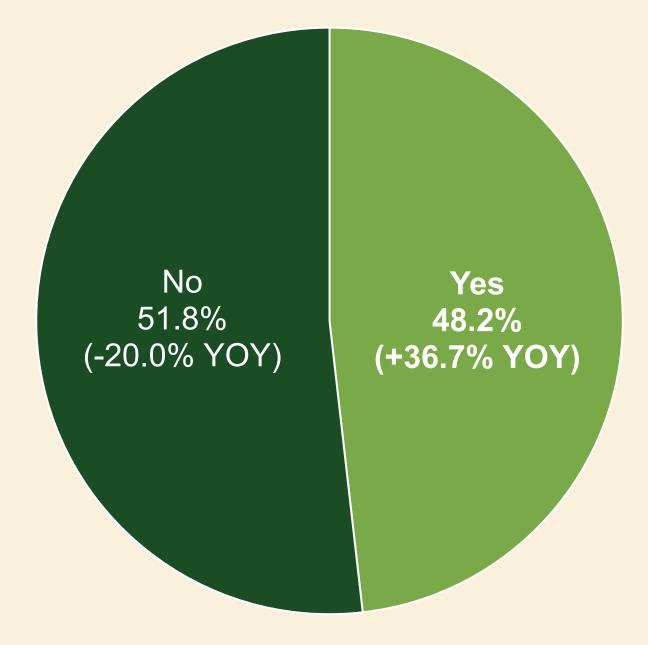
In 2022, Presidio Tunnel Tops Welcomed Nearly 1 Million Visitors

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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