

2023 PRESIDIO VISITOR PROFILE REPORT

September 2024

PRESIDIO
TRUST

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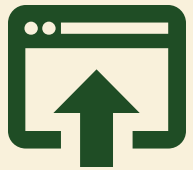
Background & Methodology



Visitor Data & Feedback Inform Our Work



Understand more about who Presidio visitors are, why they visit, what they know about the park, and their experiences while here



Gauge gaps and opportunities to support planning and operational improvements



Report agencywide & department KPIs that track progress on our goals over time



What We Survey, and How We Survey*

QUANTITATIVE
ONLINE
SURVEYS

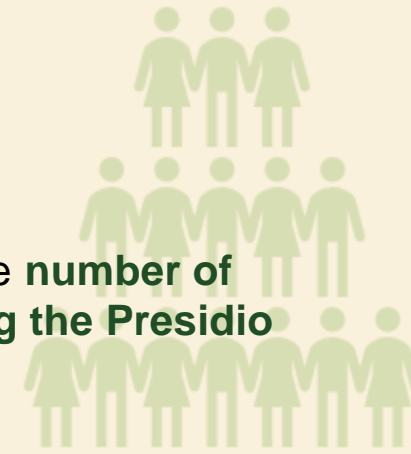
TENANT
HARD
COUNTS

CELL
PHONE
DATA

ECO-
COUNTERS

VOLUME

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



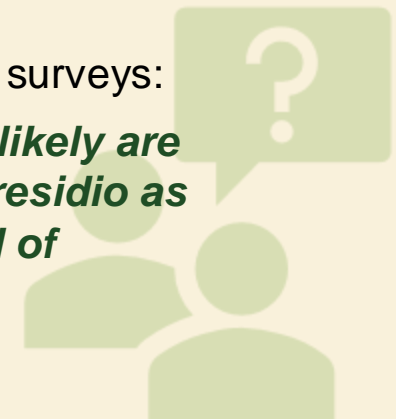
DEMOGRAPHICS

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?”



2

Executive Summary



2023:

Familiarity of the Presidio
is soaring to new heights
as visitation is stabilizing.



Executive Summary



Perceptions

Presidio is more top of mind than ever, and visitors have increasing familiarity of the park.

Aided awareness (prompted) is flat but remains high at 84%, unaided awareness (unprompted) increased 49% to 36.1%

Familiarity¹ rose to 52.8%, up 8.6%.

Likelihood to recommend remained relatively steady, dropping slightly to 8.0/10.

The majority of people (79.8%) see the Presidio as welcoming, up 4.4%.



Visitation

Visitation to the Presidio remained steady, reaching 9.5 million in 2023.

This is 0.6% decrease compared to 2022 is consistent with other national park visitation trends.

In its first full year of visitation data, Presidio Tunnel Tops welcomed nearly 1.6 million visitors in 2023, 16% of total Presidio visitation.



Origin

Visitation declines in California (non-Bay Area) were offset by increases in SF and Bay Area visitation.

Bay Area visits grew by 3.3%

San Francisco visits grew by 8.4%

International visitation continued its path towards recovery, growing by 10% compared to 2022.



Demographics

The visitation gap analysis demonstrated a reversal of some historic trends, some of which might be a result of the new data sources, versus visitation trends.²

The need gap of Asian visitors decreased to 0.1%, reversing the trend of increasing under-representation.

The need gap of Hispanic and Black visitors expanded to -5.1% and -0.8% respectively.

Income levels of visitors to the Presidio largely matched Bay Area population shares. The share of low-income visitors, after being over-indexed for several years, was 0.4% lower than the Bay Area average.

¹Familiarity measures at the 'Top 2 Box' of Very Familiar or Familiar

² New census data inputs: The geographic information has been updated from previously used 2010 Census to the 2020 Census. New block groups were added, and block group boundaries were changed from the 2010 Census to the 2020 Census. Additionally, our demographic information is now coming from the 2021 5 Year ACS, which previously came from the 2016 5 Year ACS. This new data is more recent and includes new coding of race/ethnicity questions.

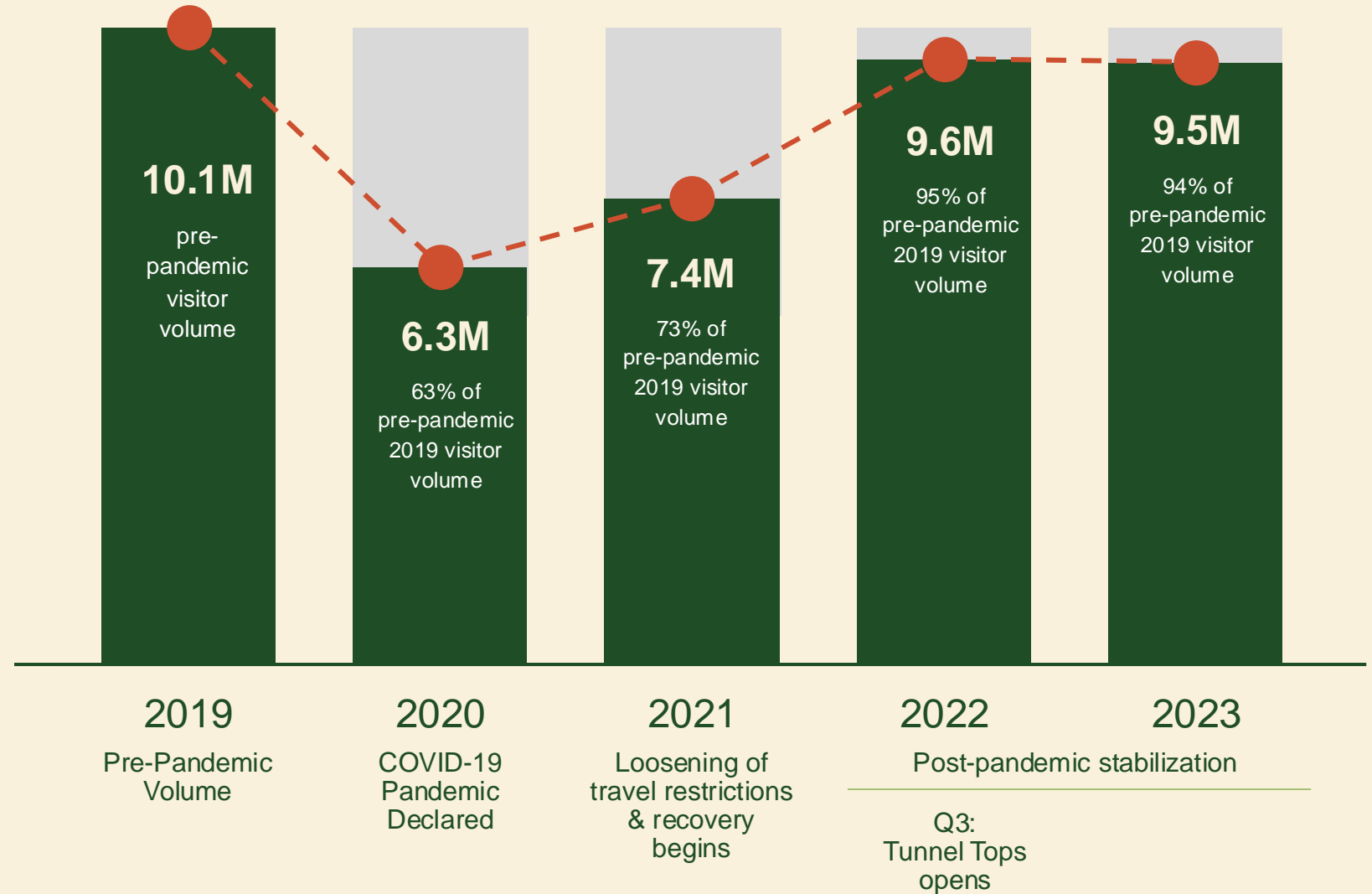
3

Visitation Volume & Seasonal Trends



After Two Years of Rapid Growth, Visitation Levels Remained Steady in 2023

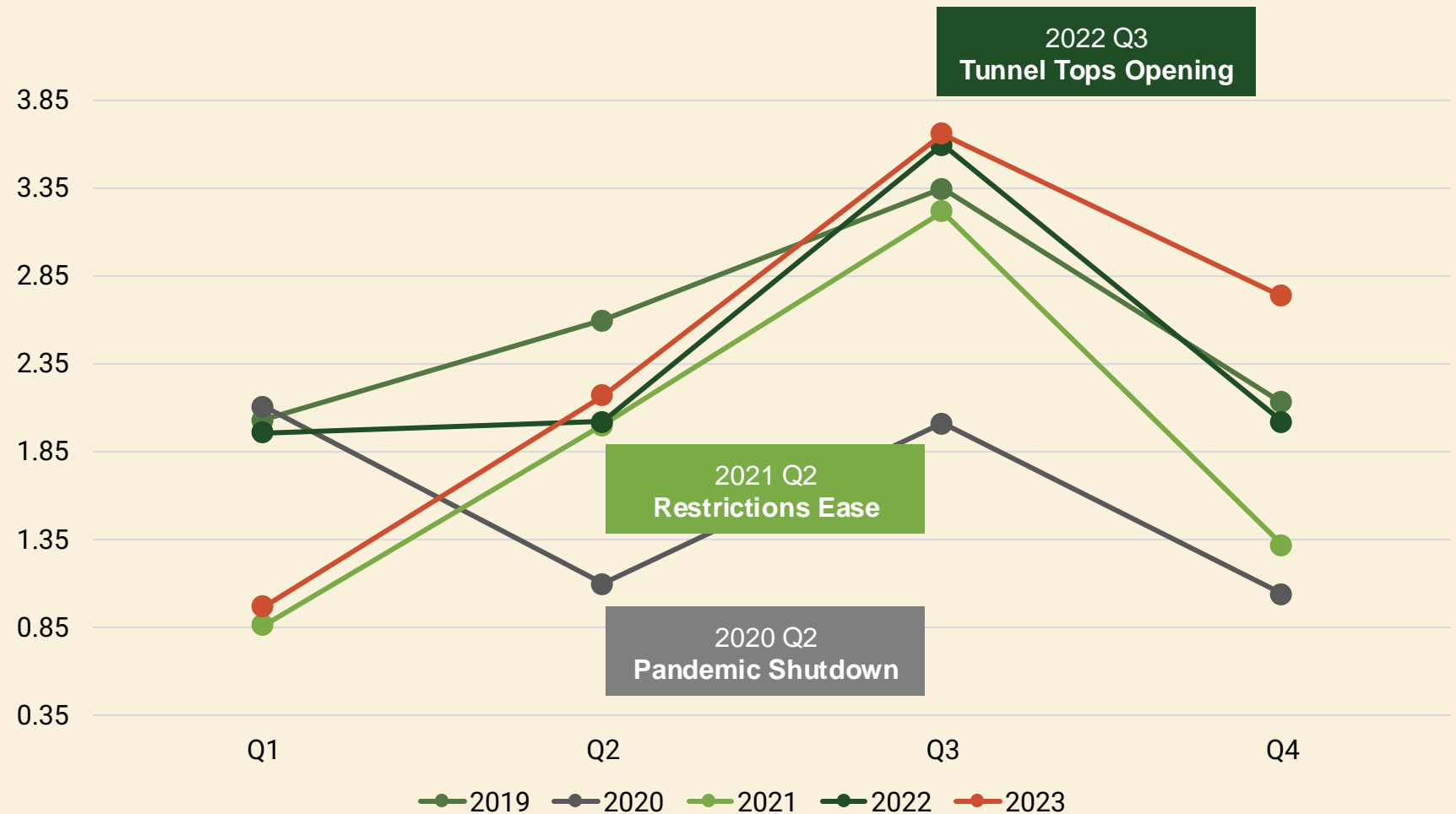
Visitation at The Presidio Relative to Pre-Pandemic Visitation (2019-2023)



Q3 and Q4 Surpassed Pre-COVID Visitation

Weather conditions likely caused '23 Q1 to be 51% lower than '22 Q1 visitation with 19x rainfall.

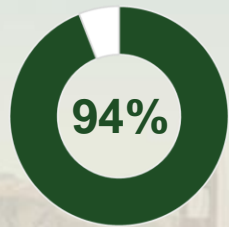
Quarterly Visitation to The Presidio (2019-2023)
Millions of visitors



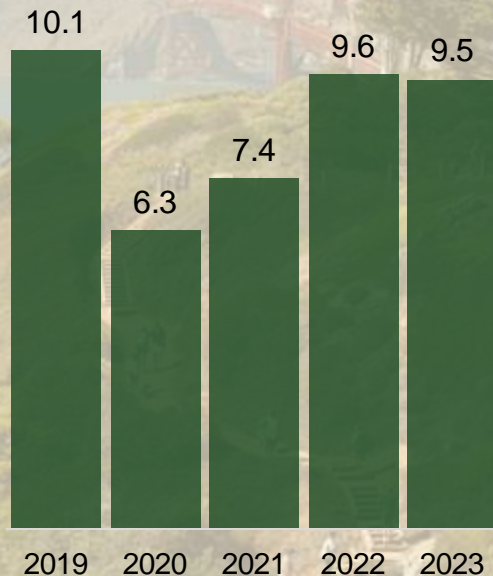
Visitation to the Presidio

followed a similar trend as other US national parks in 2023.

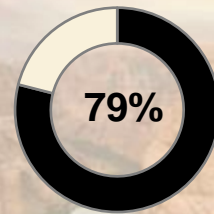
Presidio



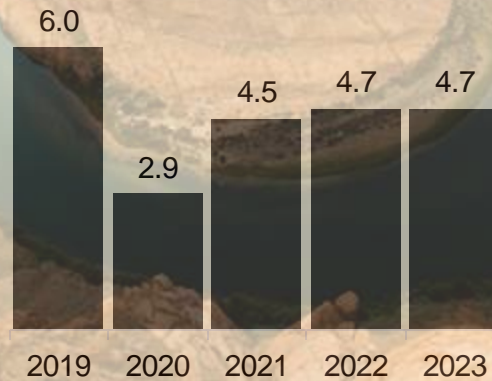
2023 Presidio visitation represented 94% of pre-pandemic 2019 visitation



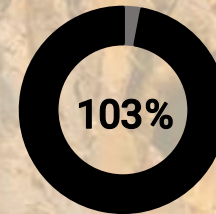
Grand Canyon



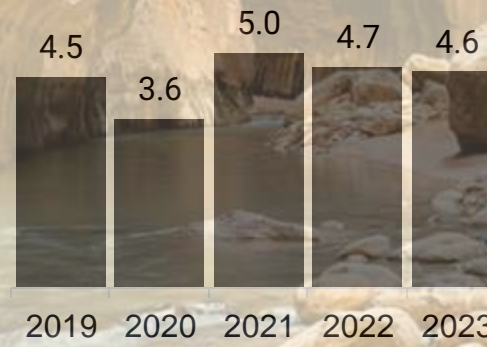
2023 visitation to the Grand Canyon represented 79% of pre-pandemic 2019 visitation



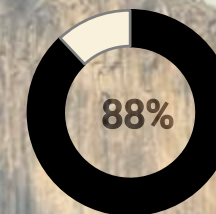
Zion



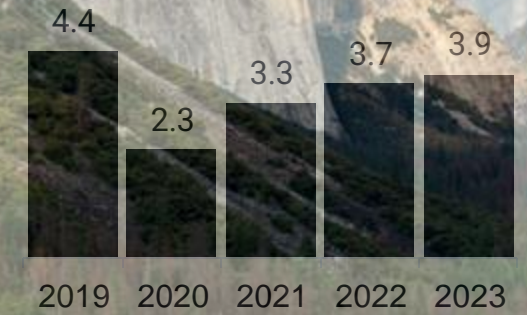
2023 visitation to Zion exceeded pre-pandemic 2019 visitation by 3%



Yosemite

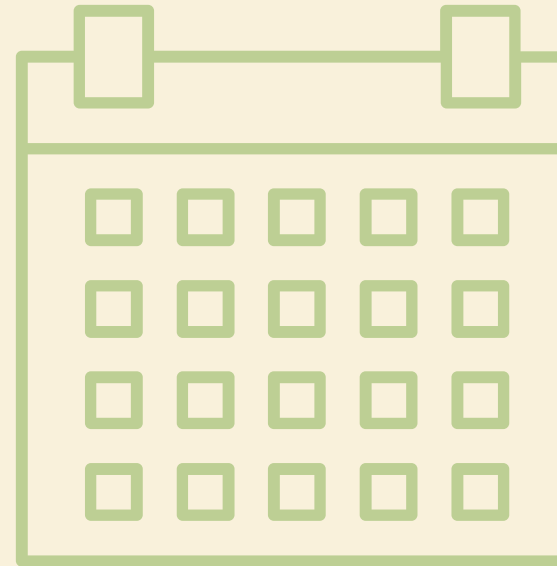


2023 visitation to Yosemite represented 88% of pre-pandemic 2019 visitation

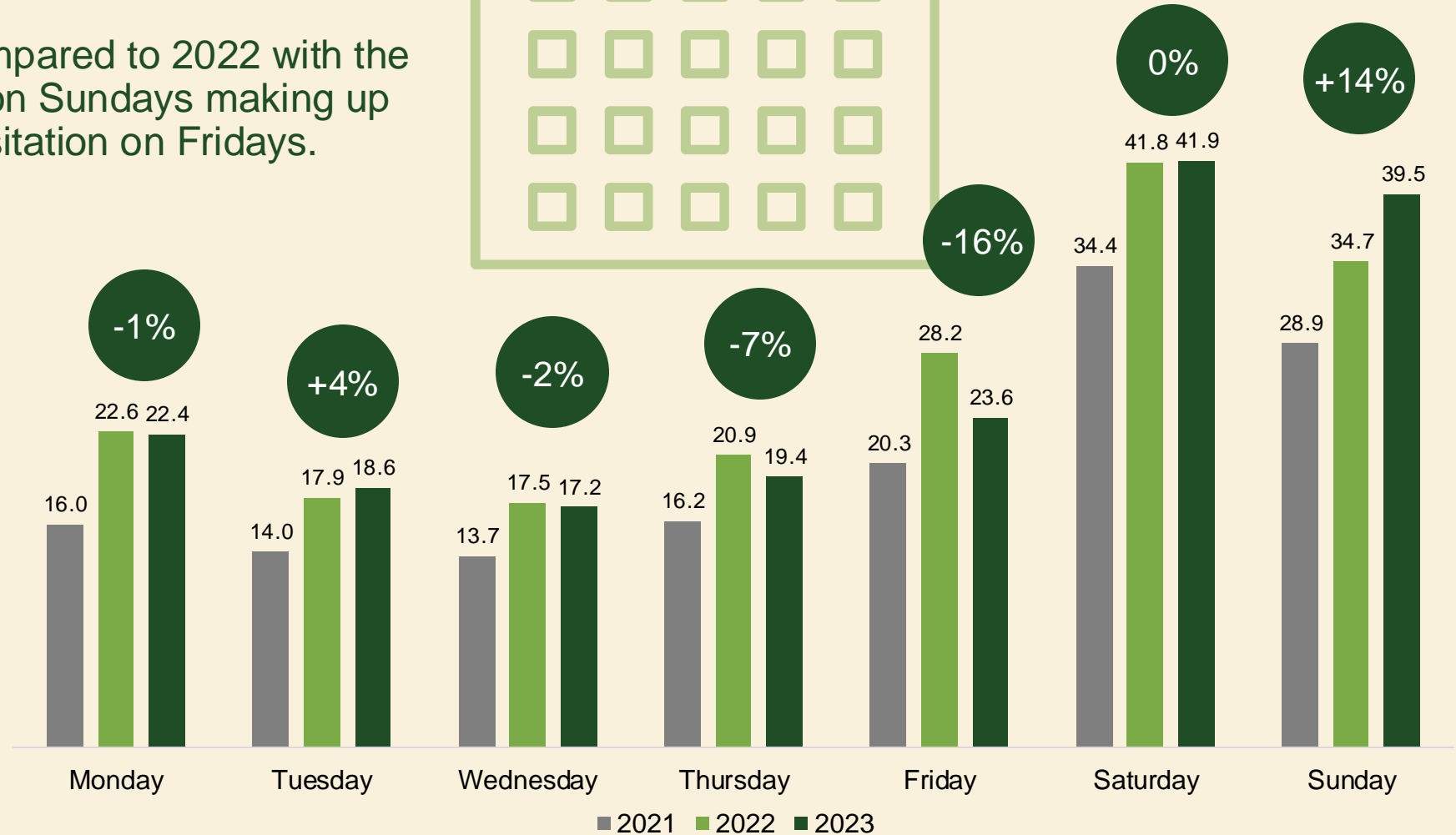


Weekend Visitation in 2023

Remained Stable Compared to 2022 with the increase in visitation on Sundays making up for the decrease in visitation on Fridays.



Average Daily Visitation to the Presidio (2021-2023)
Thousands of visitors and year-on-year % change in average daily visitation



4

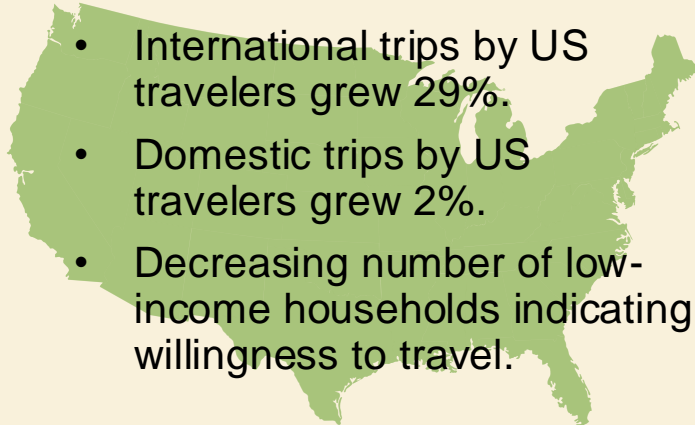
Origin of Visitors



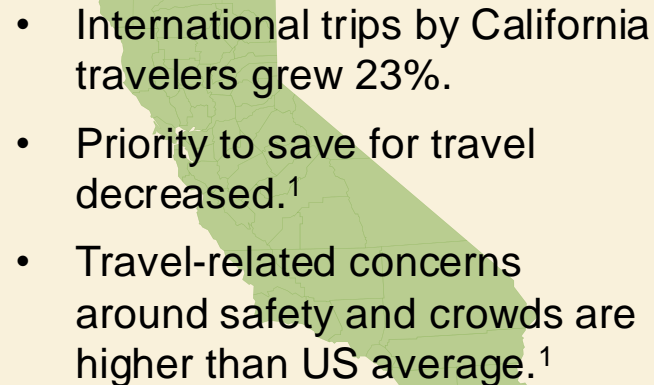
Macro Visitation Trends

- Post-Pandemic boost replaced by decreasing travel for low-income households.
- US travelers are going on an increasing number of international trips. Road trips that were frequent post-pandemic are normalizing.
- International visitors to the Bay Area grew while US visitors remained constant.
- Negative views of San Francisco could be affecting visitation from California.

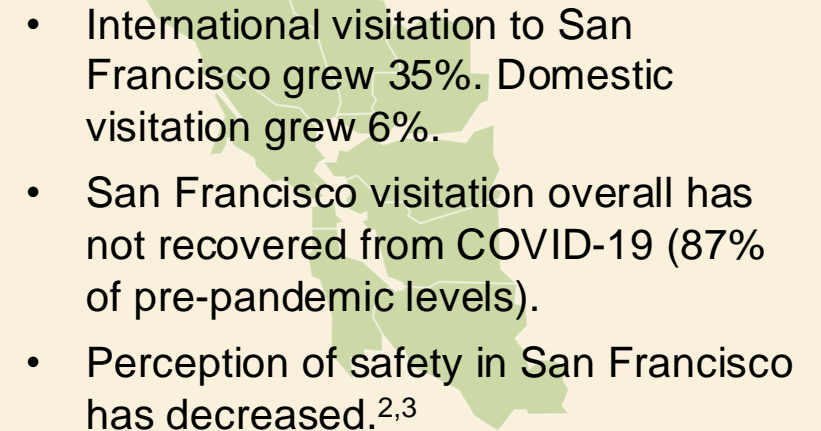
US Trends

- 
- International trips by US travelers grew 29%.
 - Domestic trips by US travelers grew 2%.
 - Decreasing number of low-income households indicating willingness to travel.

California Trends

- 
- International trips by California travelers grew 23%.
 - Priority to save for travel decreased.¹
 - Travel-related concerns around safety and crowds are higher than US average.¹

San Francisco Trends

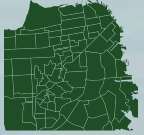
- 
- International visitation to San Francisco grew 35%. Domestic visitation grew 6%.
 - San Francisco visitation overall has not recovered from COVID-19 (87% of pre-pandemic levels).
 - Perception of safety in San Francisco has decreased.^{2,3}

Source 1: Monthly Travel Indicators Summary “– March 2024,” Visit California. <https://industry.visitcalifornia.com/research/report/monthly-travel-indicators-summary>

Source 2: “2023 City Survey Results.” The City and County of San Francisco. <https://www.sf.gov/reports/april-2023/2023-city-survey-results>

Source 3: “Americans Rate Dallas and Boston Safest of 16 US Cities.” Gallup. <https://news.gallup.com/poll/509801/americans-rate-dallas-boston-safest-cities.aspx>

Source of Origin



1.9M
San Francisco

+8.4% increase from 2022
levels



3.2M
Bay Area

Excluding San Francisco

+3.3% increase from 2022
levels



2.1M
California

Excluding Bay Area

-15.9% decrease from 2022
levels



1.8M
US States

Excluding California

+2.2% increase from 2022
levels



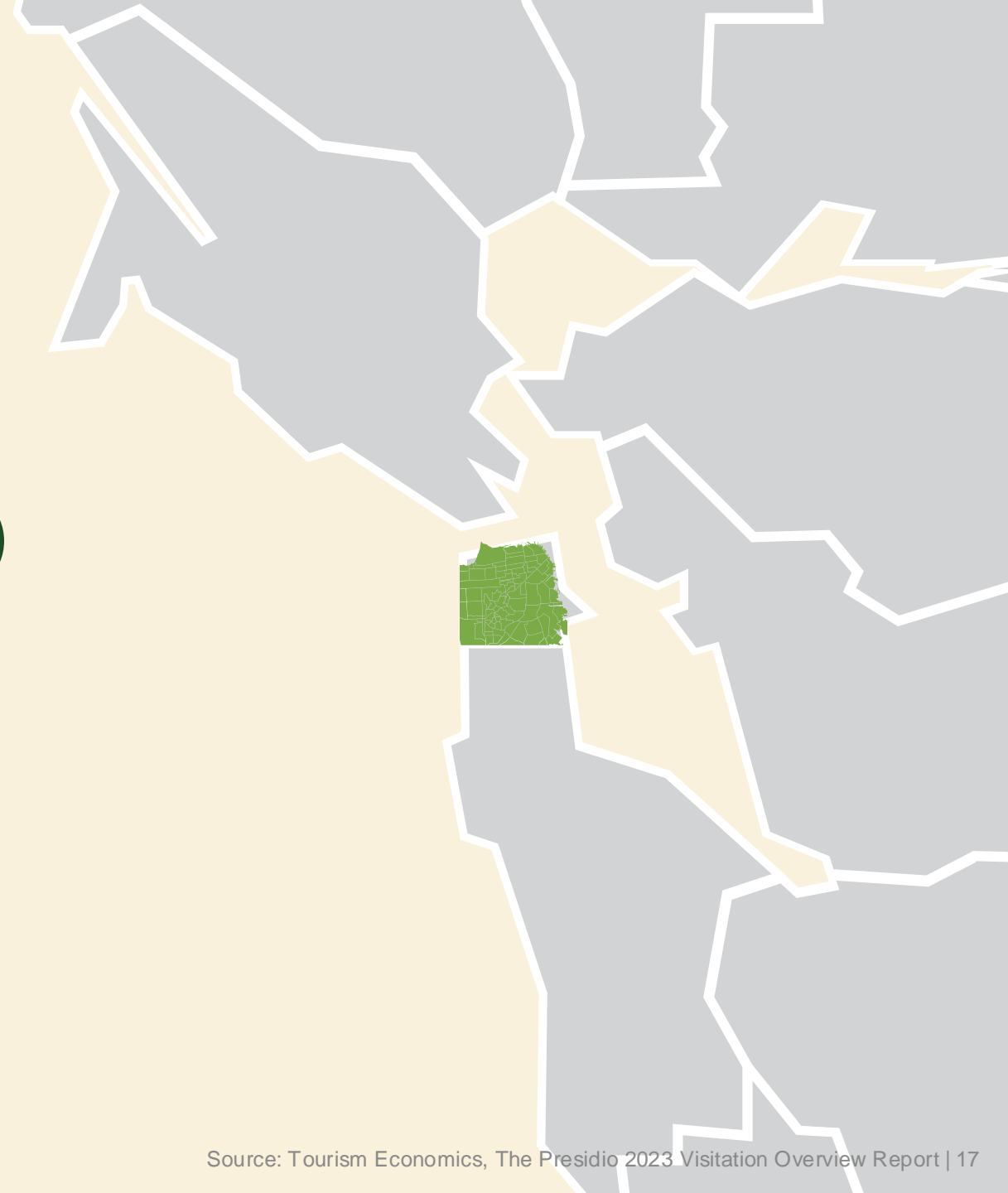
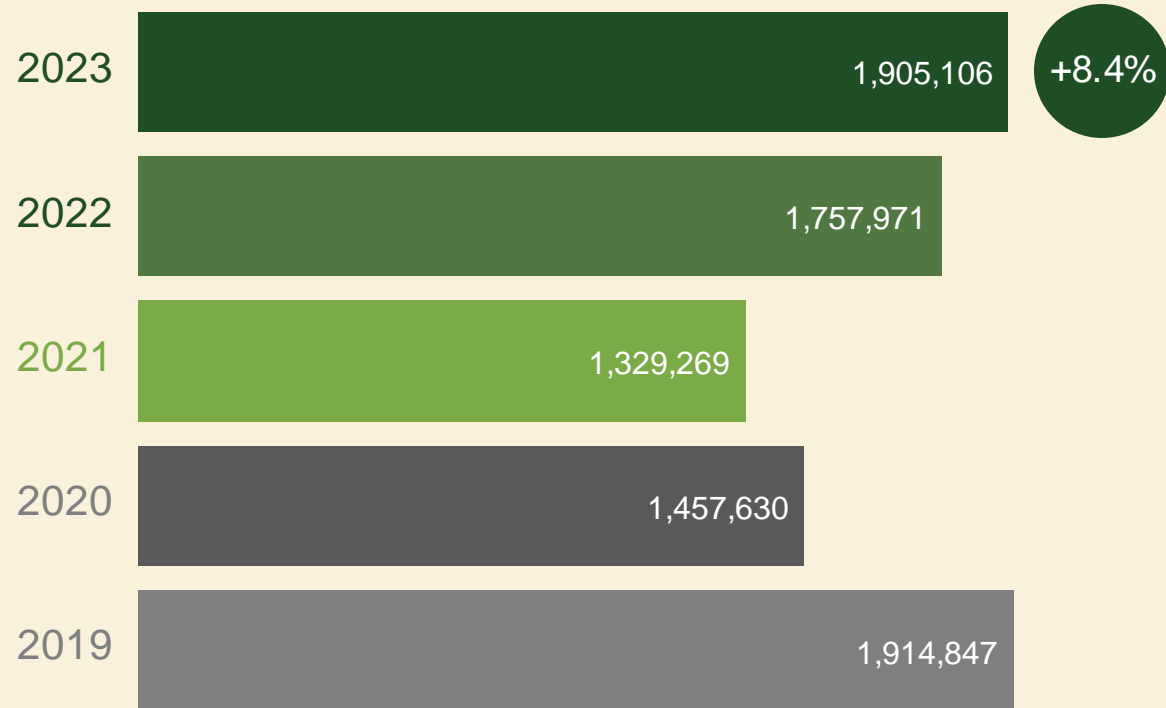
570,000
International

+9.9% increase from 2022
levels

San Francisco

Visitation growth continued.

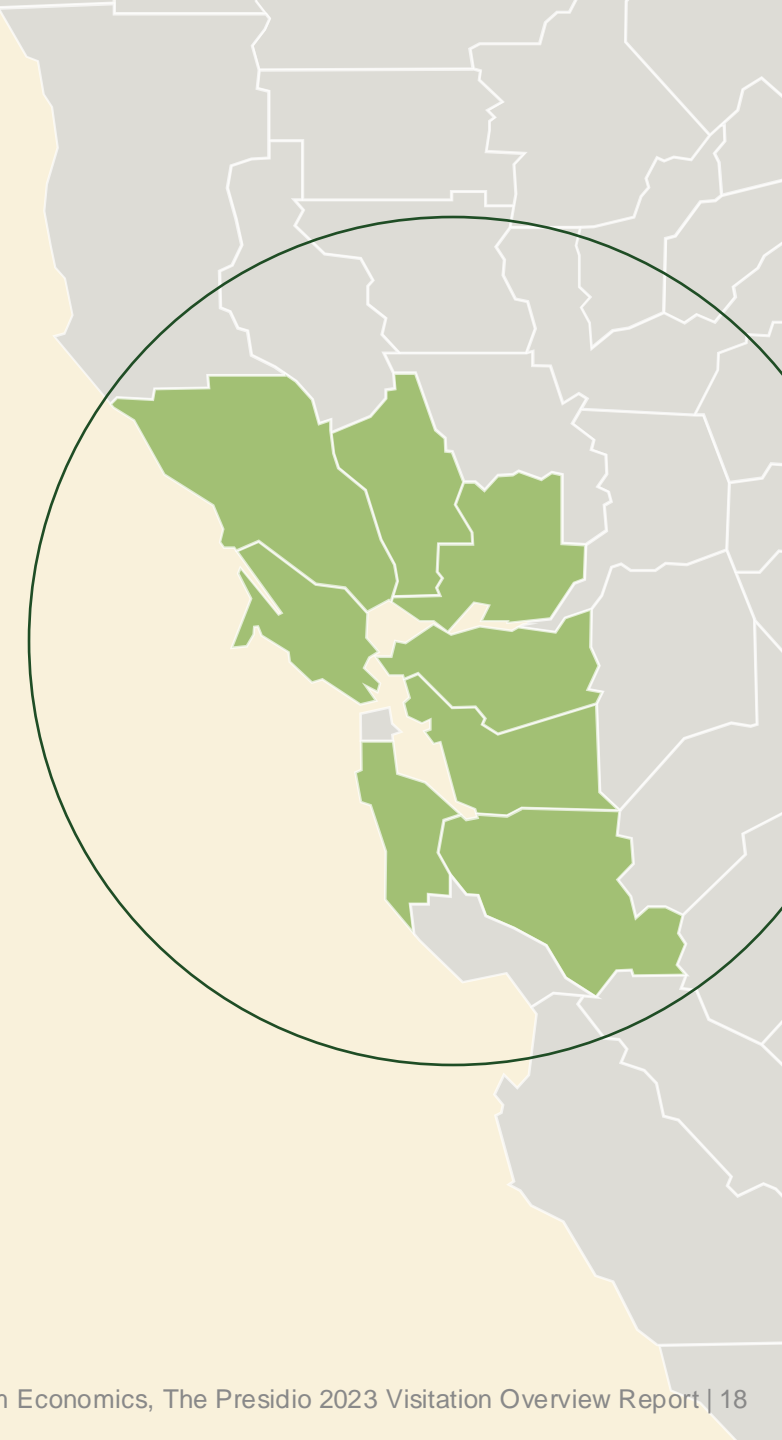
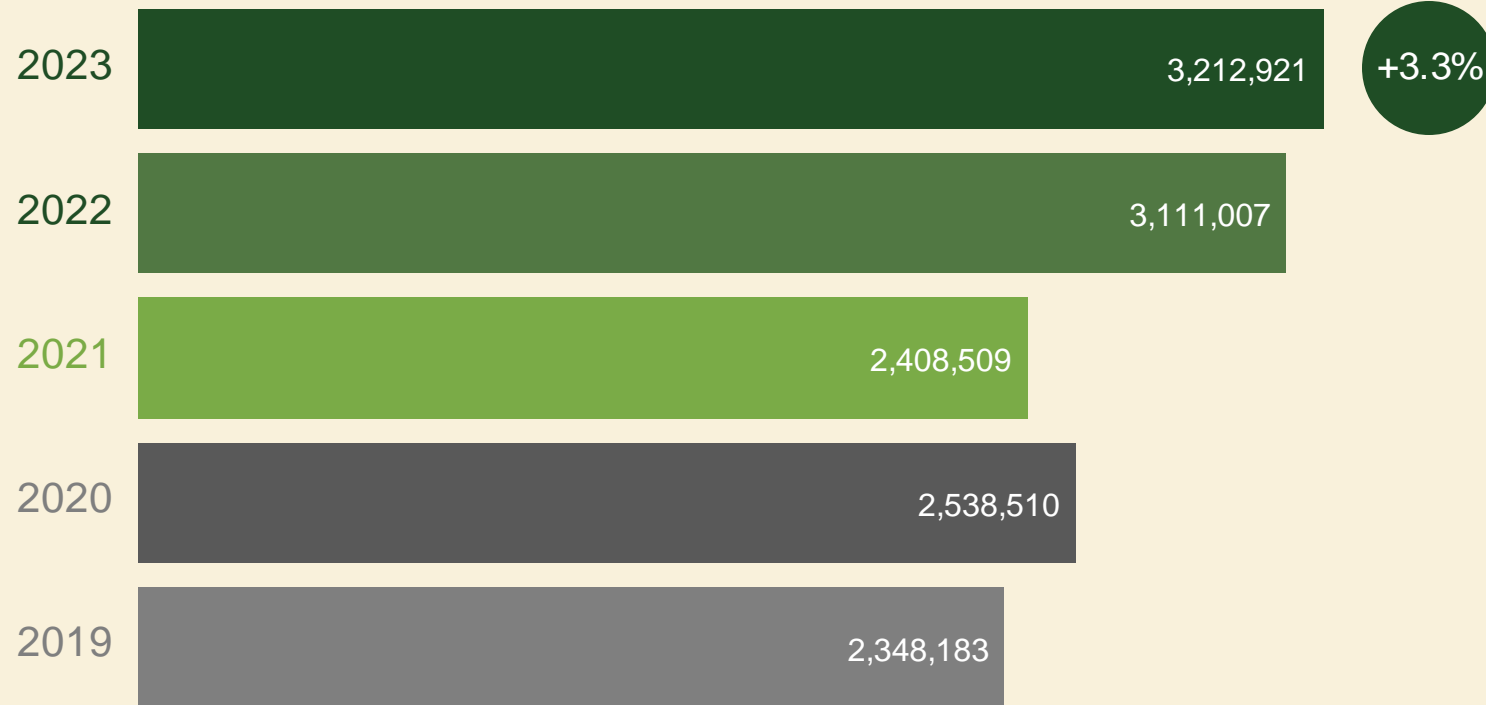
SAN FRANCISCO Visitation to the Presidio (2019-2023)
Number of visitors and year-on-year percent change in total Presidio visitation



Bay Area

Visitation also continued to grow.

BAY AREA (excluding SF) Visitation to the Presidio (2019-2023)
Number of visitors and year-on-year percent change in total Presidio visitation

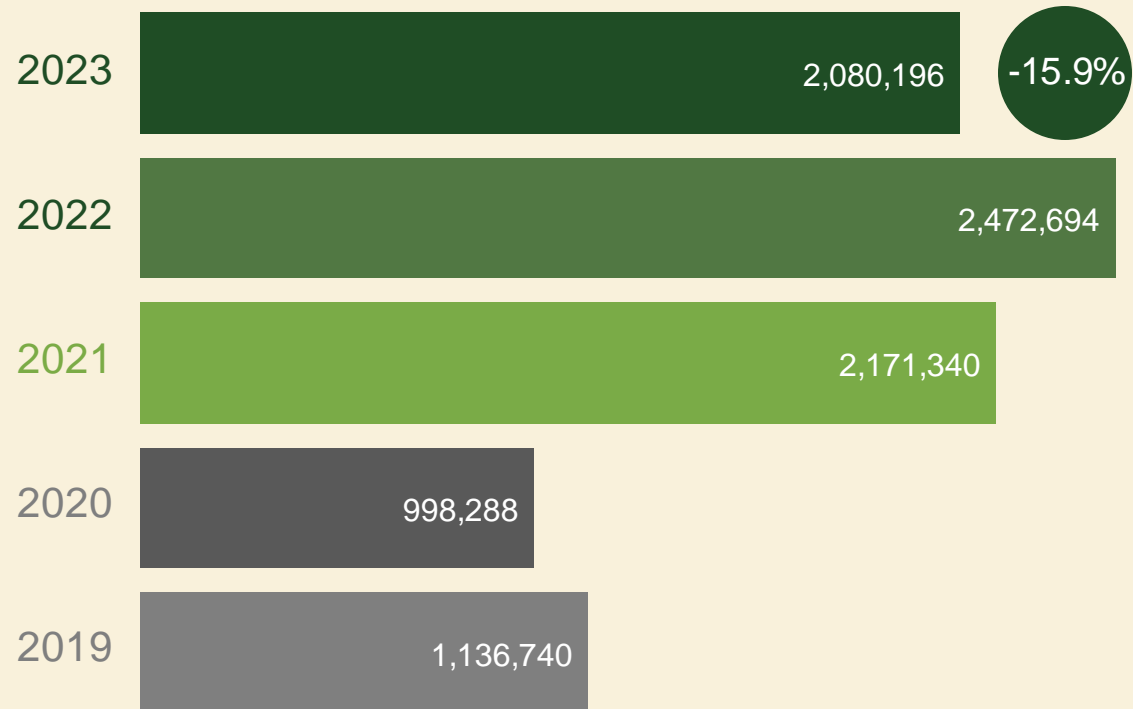


Other California

Declines in Other California were largely offset by SF and Bay Area growth.

OTHER CALIFORNIA Visitation to the Presidio (2019-2023)

Number of visitors and year-on-year percent change in total Presidio visitation

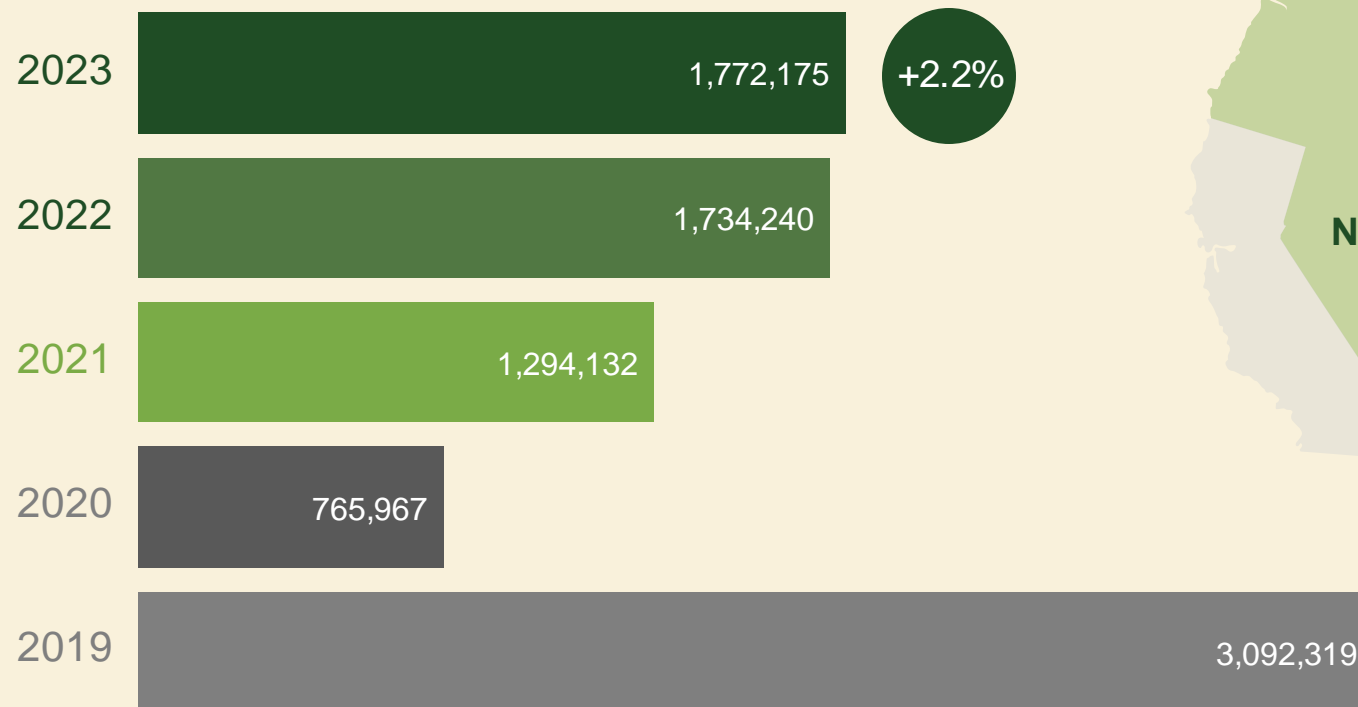


Other Domestic (Non-California) Visitation Continued its Paths Towards Full Recovery

With 2% growth over 2022 levels.

Other Domestic Visitation to the Presidio (2019-2023)

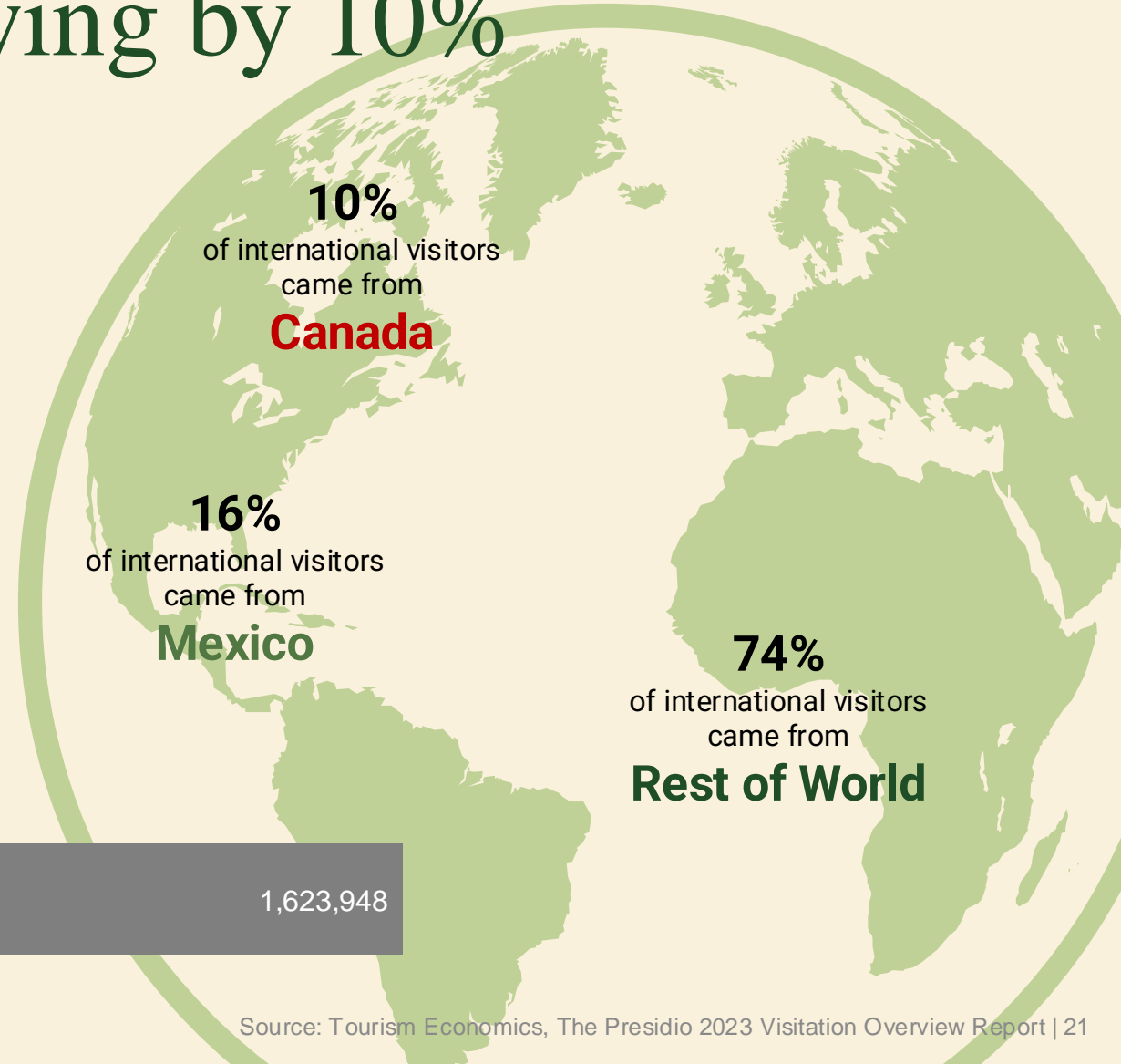
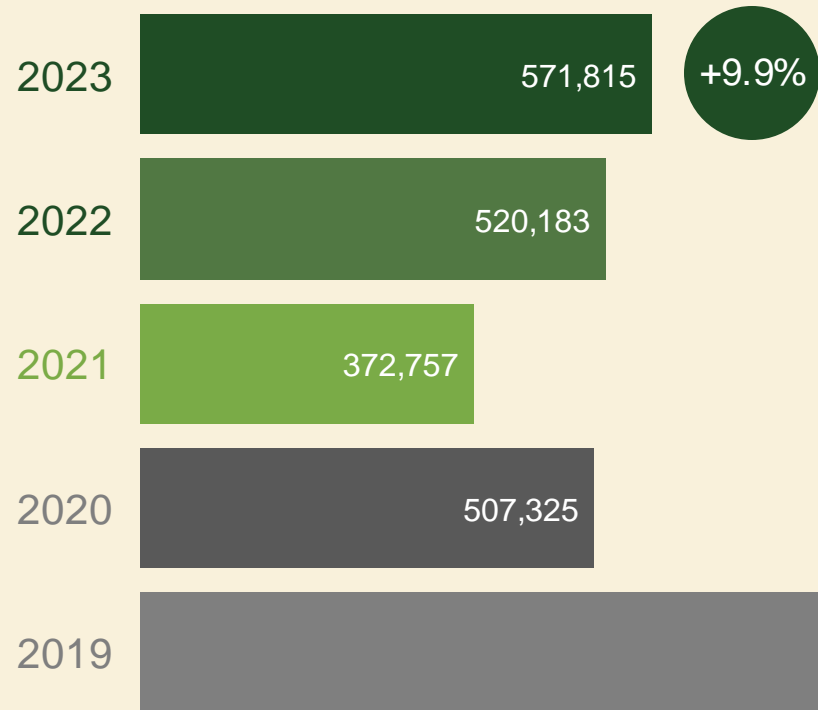
Number of visits and year-on-year percent change in total Presidio visitation



International Visitation Made a Strong Recovery in 2023, Growing by 10%

International Visitation to the Presidio (2019-2023)

Number of visits and year-on-year percent change in total Presidio visitation



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Visitor Demographics



Summary of Changes with the New Census

What's Changed:

Updated geographies –

New block groups were added, and block group boundaries were changed from the 2010 Census to the 2020 Census.

Updated demographics – New coding of race/ethnicity questions makes demographic data more inclusive.

What's This Means:

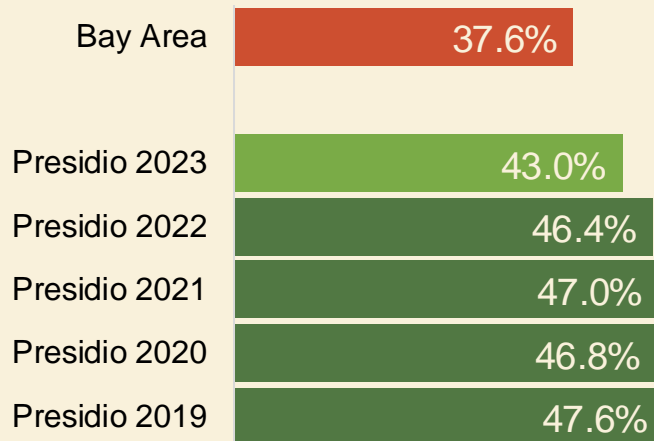
Year-to-year variance – The multitude of changing factors may have extra influence on changes observed from 2022 data to 2023 data. Next year's data will provide more insight on visitation v data related changes.



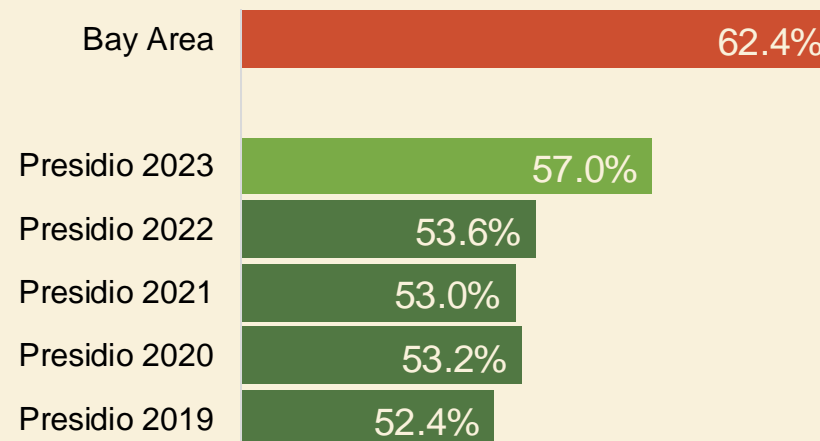
Presidio Demographics Summary

Presidio visitation is over-represented by White visitors and under-represented by BIPOC visitors compared to Bay Area demographics, but is trending to higher BIPOC visitation.

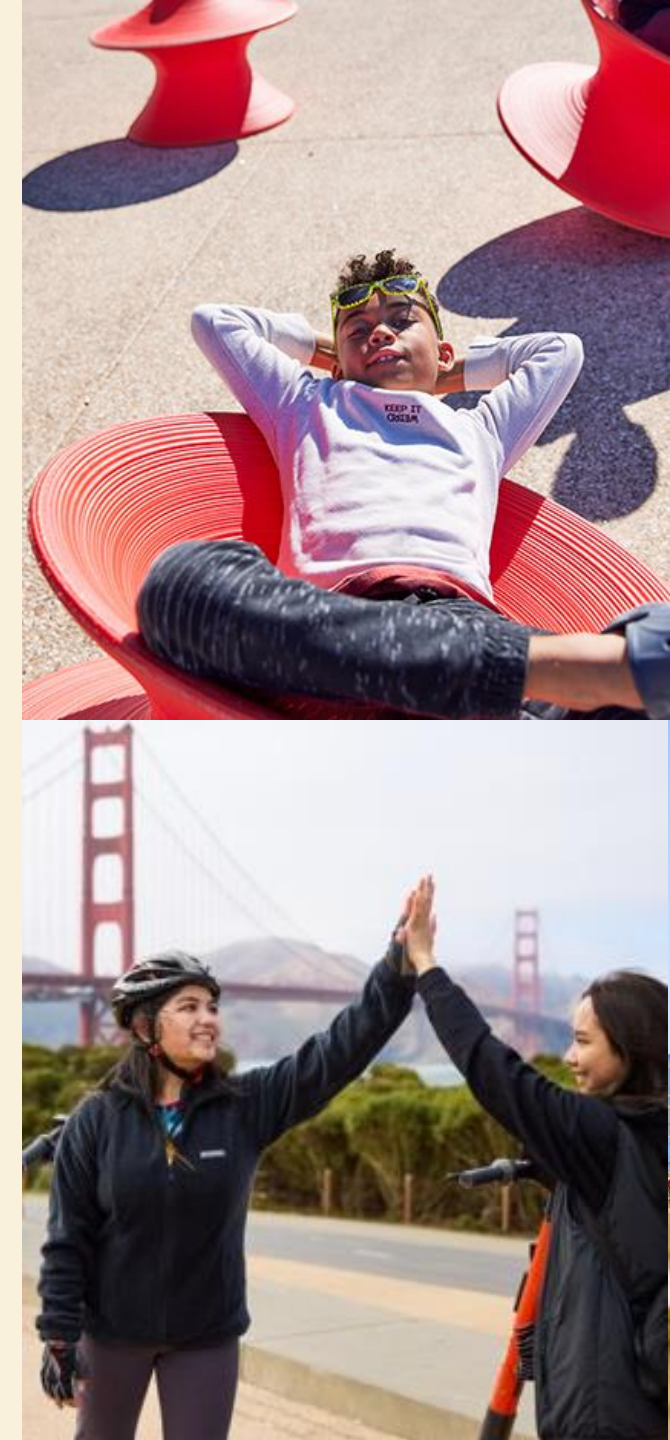
White



BIPOC

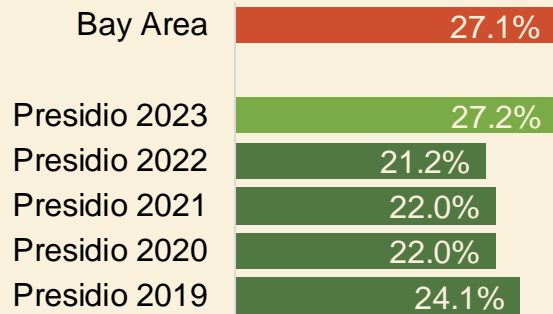


Note: 2016 ACS data was used for the 2019-2022 visitation years. 2021 ACS data was used for the 2023 visitation year.

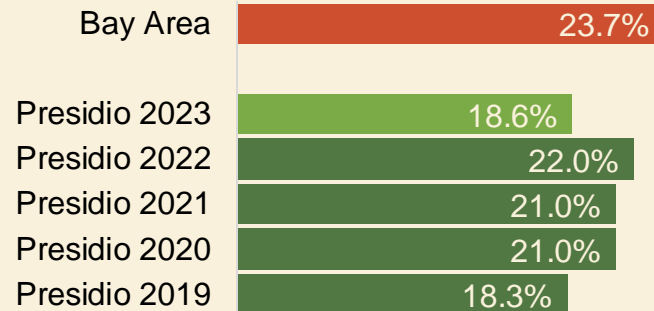


Presidio Visitation is Most Under-represented by Hispanic Visitors

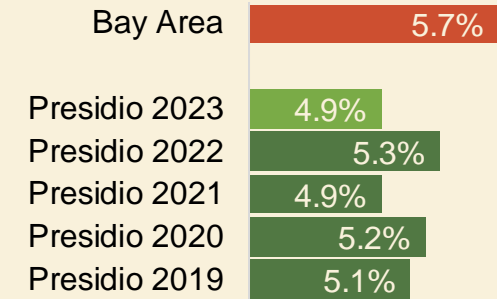
Asian



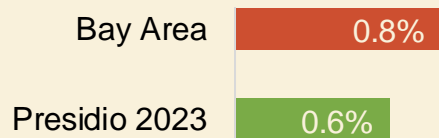
Hispanic



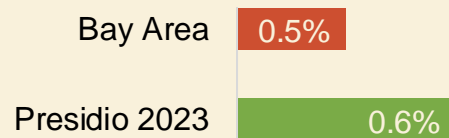
Black



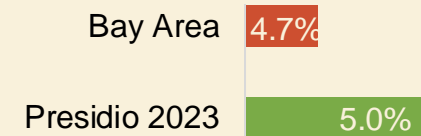
Native American



Some Other Race



Two or More Races



Note: 2016 ACS data was used for the 2019-2022 visitation years. 2021 ACS data was used for the 2023 visitation year.

Visitation Levels by Income are Roughly in Line with Bay Area Averages

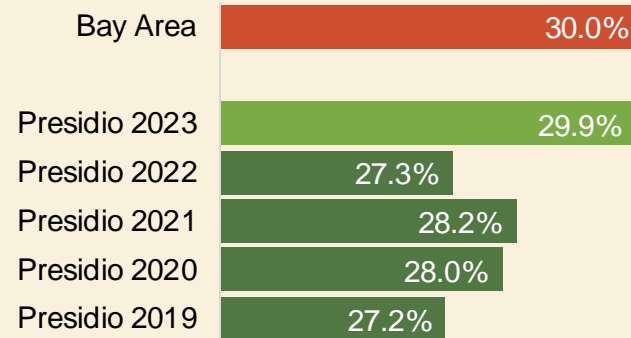
Note: Low Income corresponds with a household income between \$0 and \$99,999
Middle-Income corresponds with a household income between \$100,000 and \$199,999
High-Income corresponds with a household income of \$200,000 and above.

Note: 2016 ACS data was used for the 2019-2022 visitation years. 2021 ACS data was used for the 2023 visitation year.

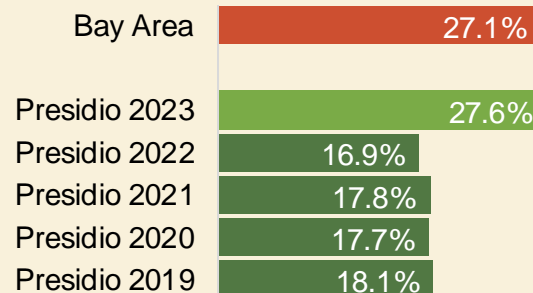
Low-Income



Middle-Income

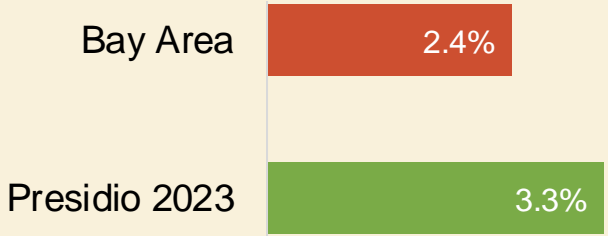


High-Income



Same-Sex Couple Households* Over-index on Visitation

Same-Sex Couple Households



Note: This is the only proxy measure currently available by US Census Bureau for LGBTQIA+ visitation. The Presidio Trust will continue to incorporate new data for sexual orientation/gender identity as it becomes available.

Source: Tourism Economics, The Presidio 2023 Visitation Overview Report, American Community Survey, Five-Year Estimates (2016 & 2021) | 27



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Visitor Attitudes, Perceptions & Sentiments

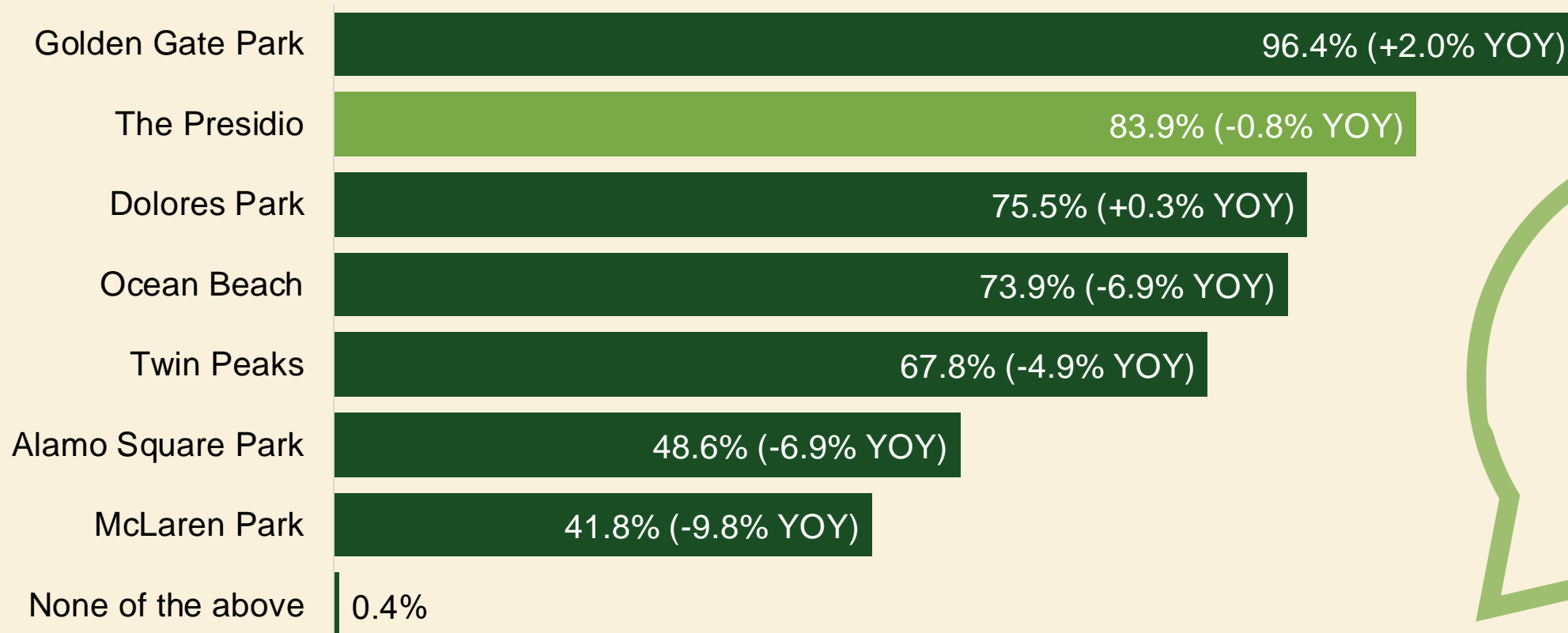


WHEN PROMPTED,

Awareness of the Presidio Remains High

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

Base: All respondents, 1200 responses

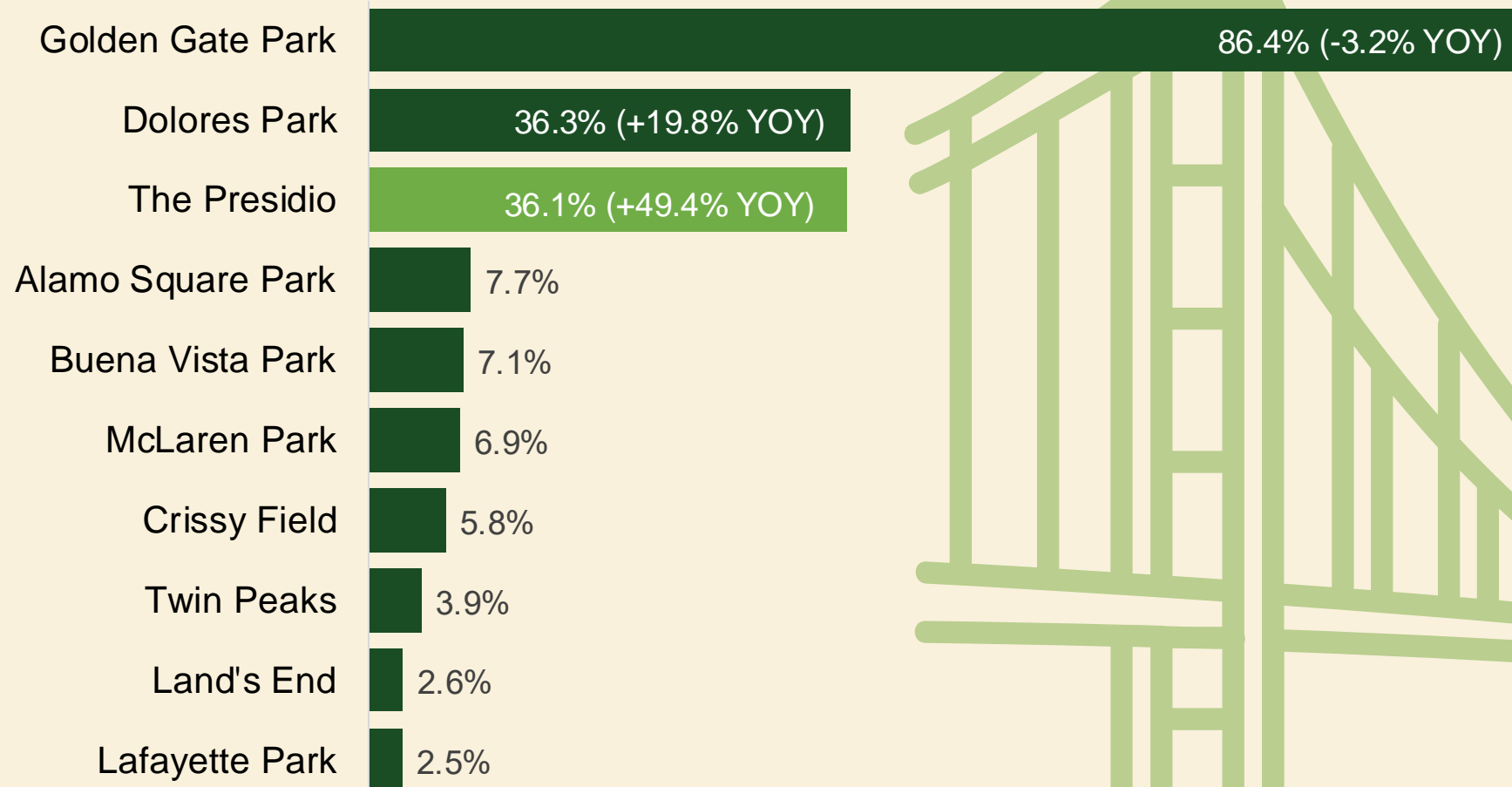


MENTIONS OF THE PRESIDIO AS A

Top-of-Mind San Francisco Park has Grown

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

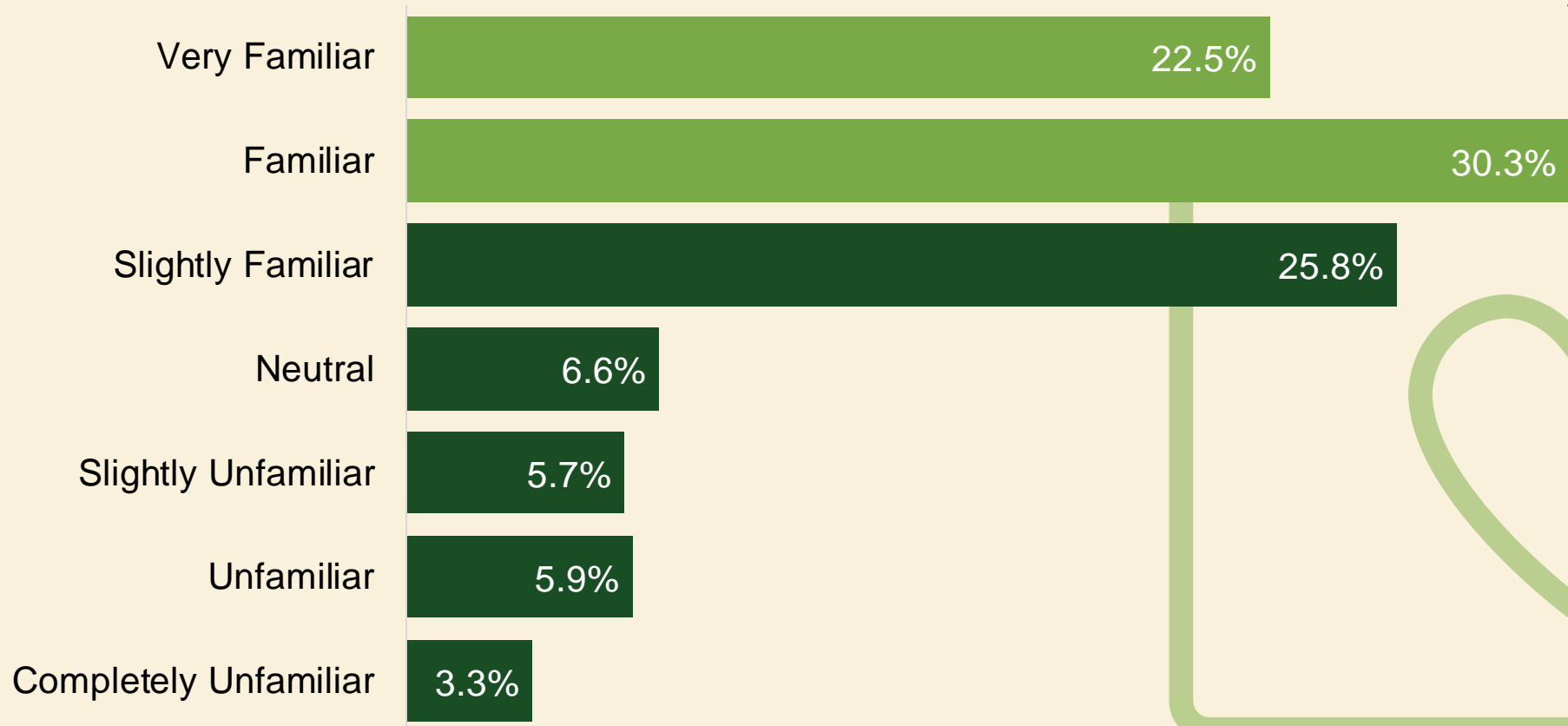
Base: 1196 responses



More than Half of Bay Area Has Familiarity with the Presidio

QUESTION: Overall, how familiar are you with the Presidio?

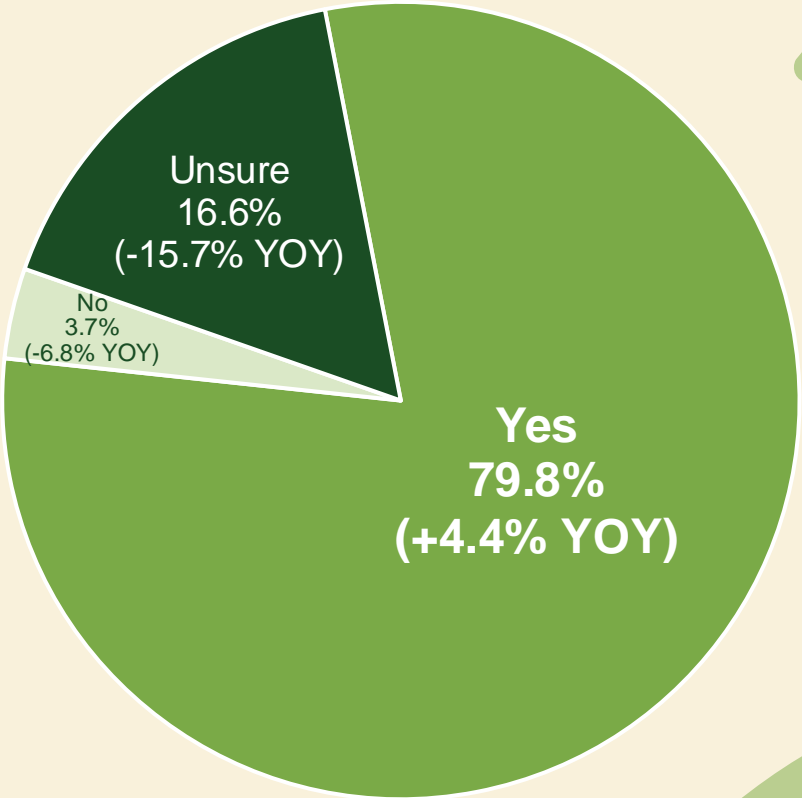
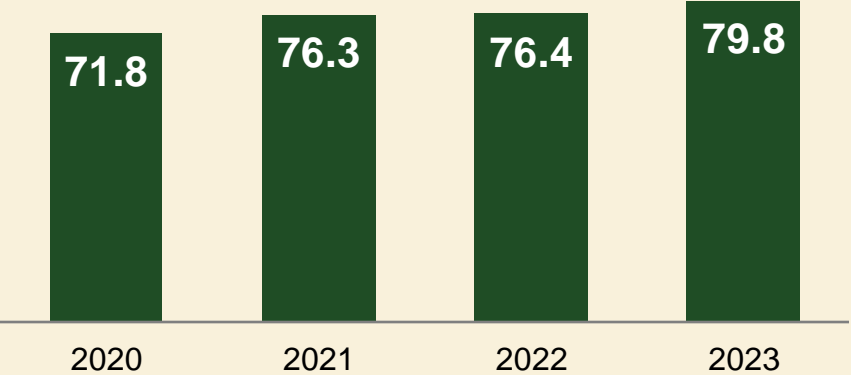
Top Two Box Score:
52.8%
(+8.6% YOY)



The Perception that the Presidio is a Welcoming Destination¹ is Growing

Sense of welcome is a key indicator for measuring inclusiveness and belonging.

Sense of Welcoming Over Time

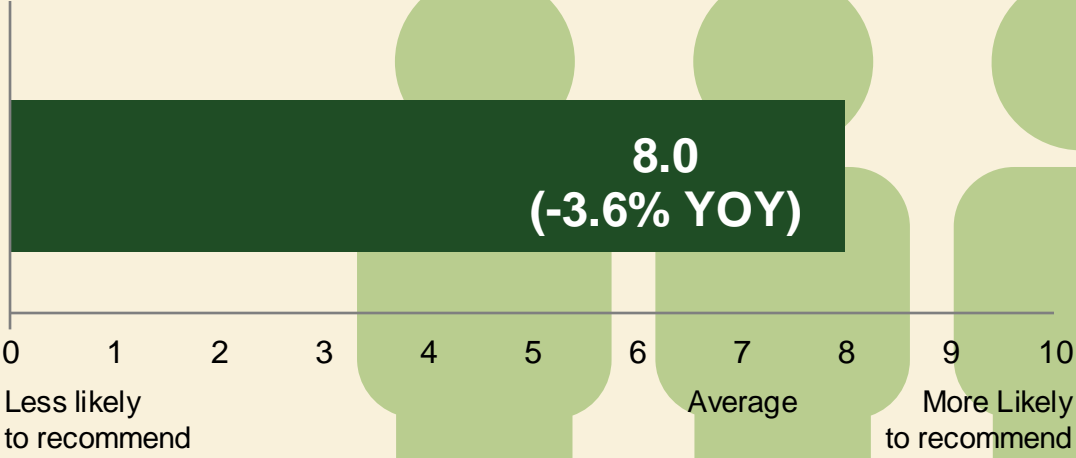
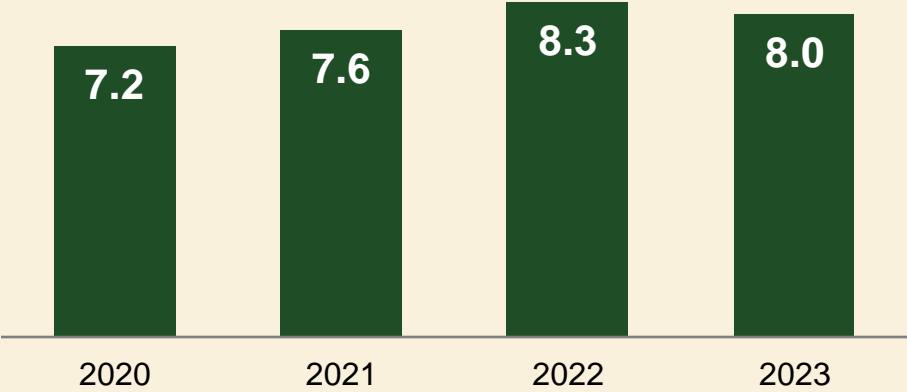


Source: Future Partners, Attitude, Awareness and Understanding Survey Report, 2023 | 32
QUESTION: Do you feel the Presidio is a welcoming place for you? N=1200

The Presidio Remains a Place with a High Likelihood to Recommend (LTR)

LTR is a key indicator for overall visitor satisfaction with their experience.¹

Likelihood to Recommend the Presidio by Year



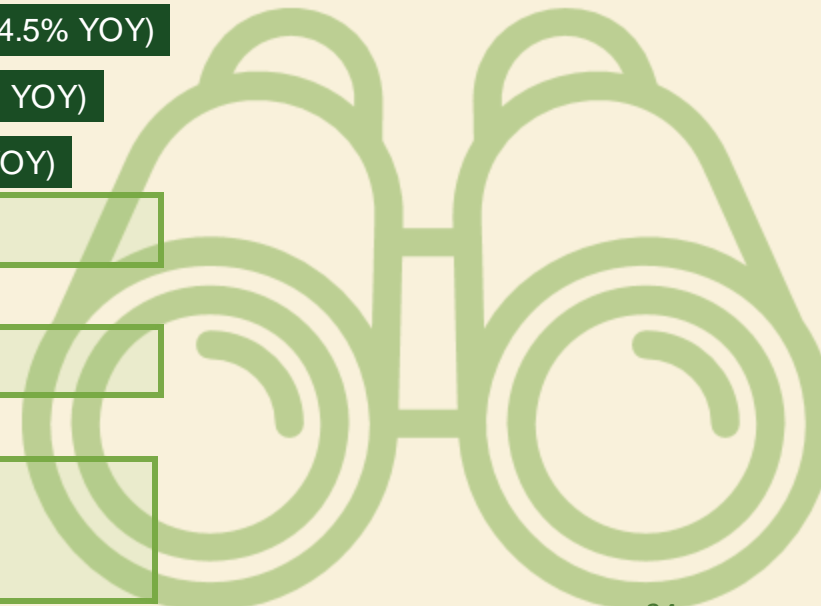
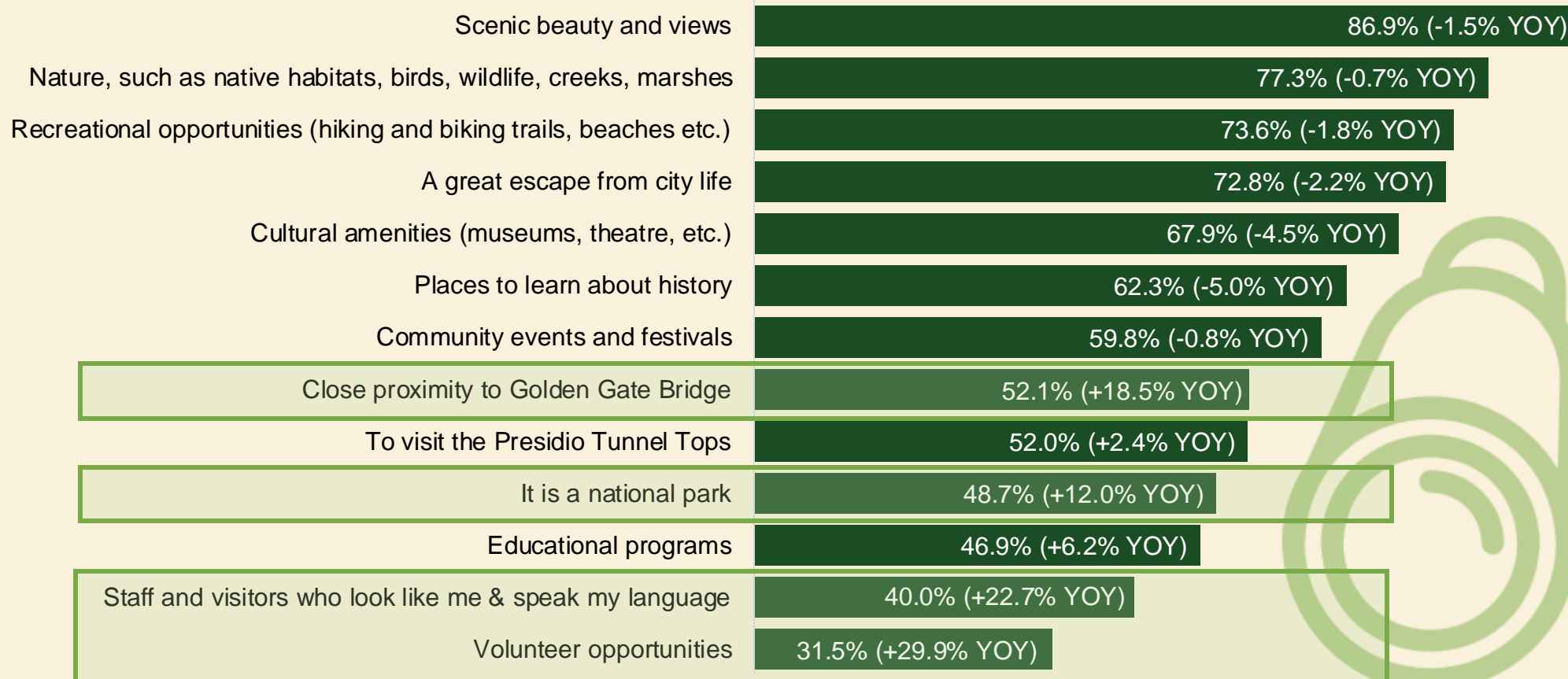
Source: Future Partners, Attitude, Awareness and Understanding Survey Report, 2023 | 33
QUESTION: How likely are you to recommend the Presidio as a place to visit to a friend or family member? Base: Respondents who have visited the Presidio in the past 12 months. 2020 n=575 responses; 2021 n= 645 responses; 2022 n=630 responses; 2023: n=660 responses

Scenic Views And Nature Remain Top Motivations to Visit the Presidio

But Volunteer Opportunities And Staff/Visitors Who Are Like Me Rose.

QUESTION: What would motivate you to visit the Presidio? Please rate the following attributes by importance.
Base: All respondents; 1,200 responses.

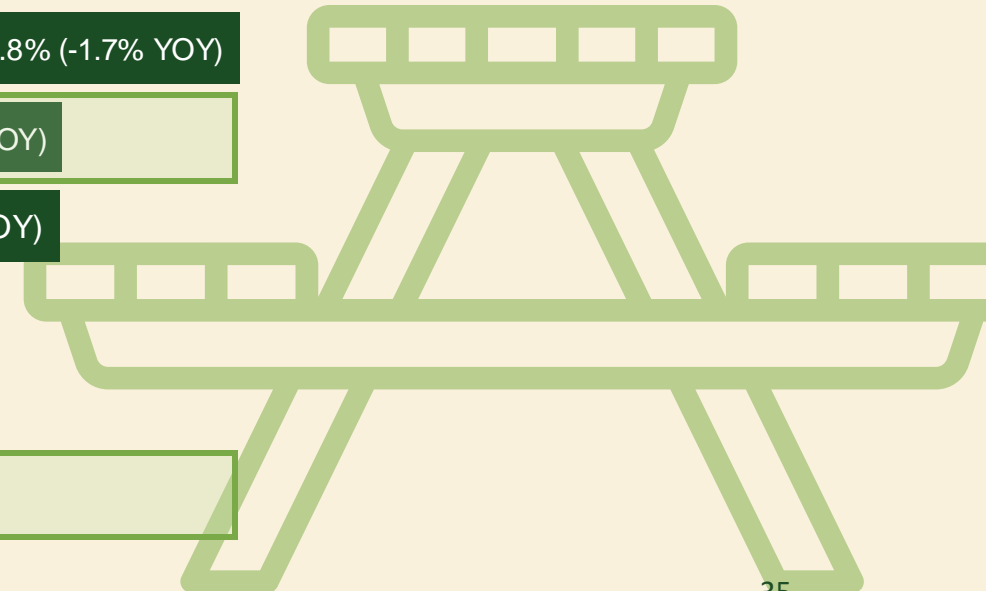
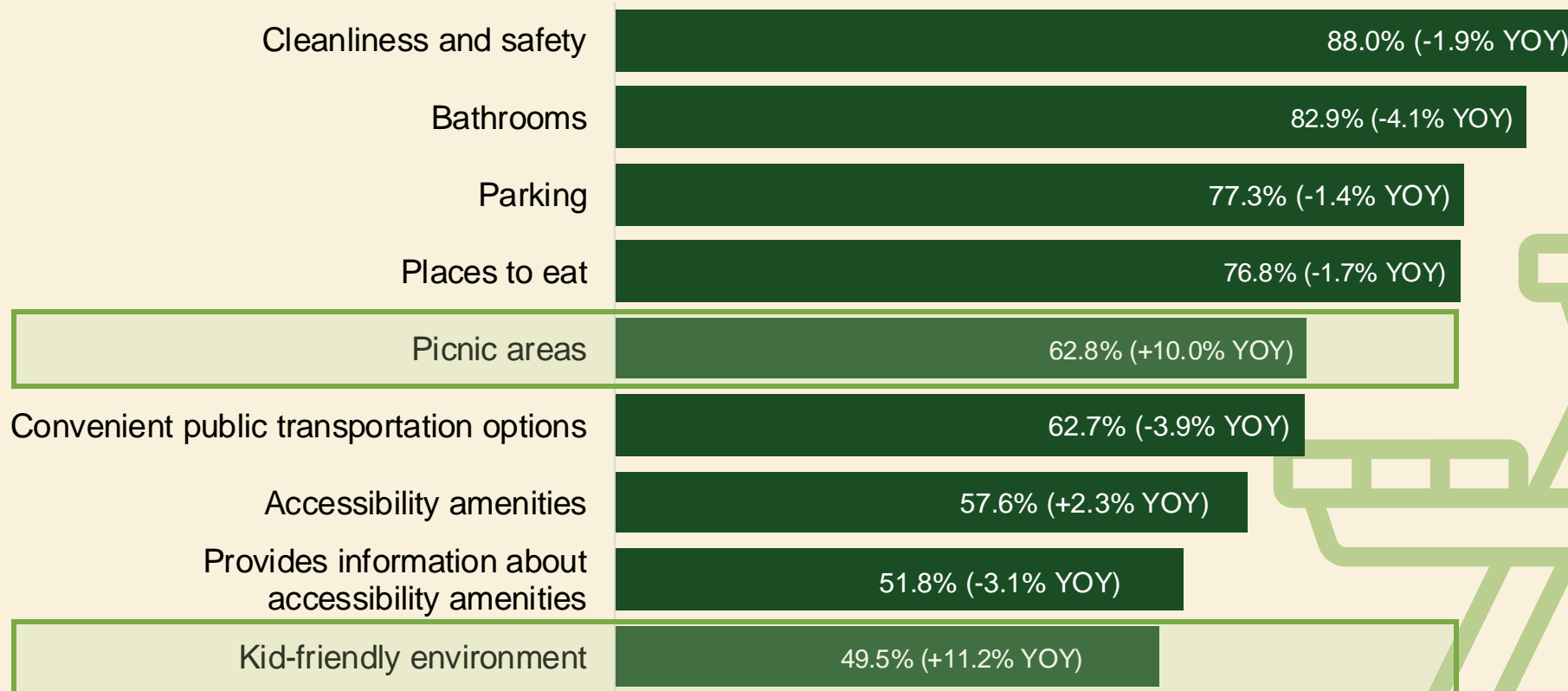
Top Two Box
Score:
% Rating each as
“Important” or
“Very important”



TOP 3 MOTIVATING AMENITIES REMAIN HISTORICALLY CONSISTENT, BUT Presidio Tunnel Tops Related Amenities Demonstrate Growth

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”



Thank You

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