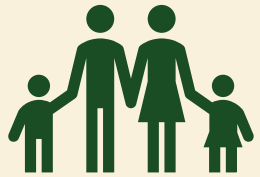


2021 Presidio Visitor Profile Report

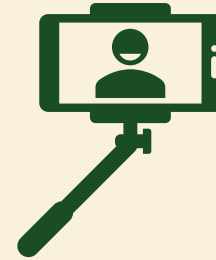
September 13, 2022

**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**

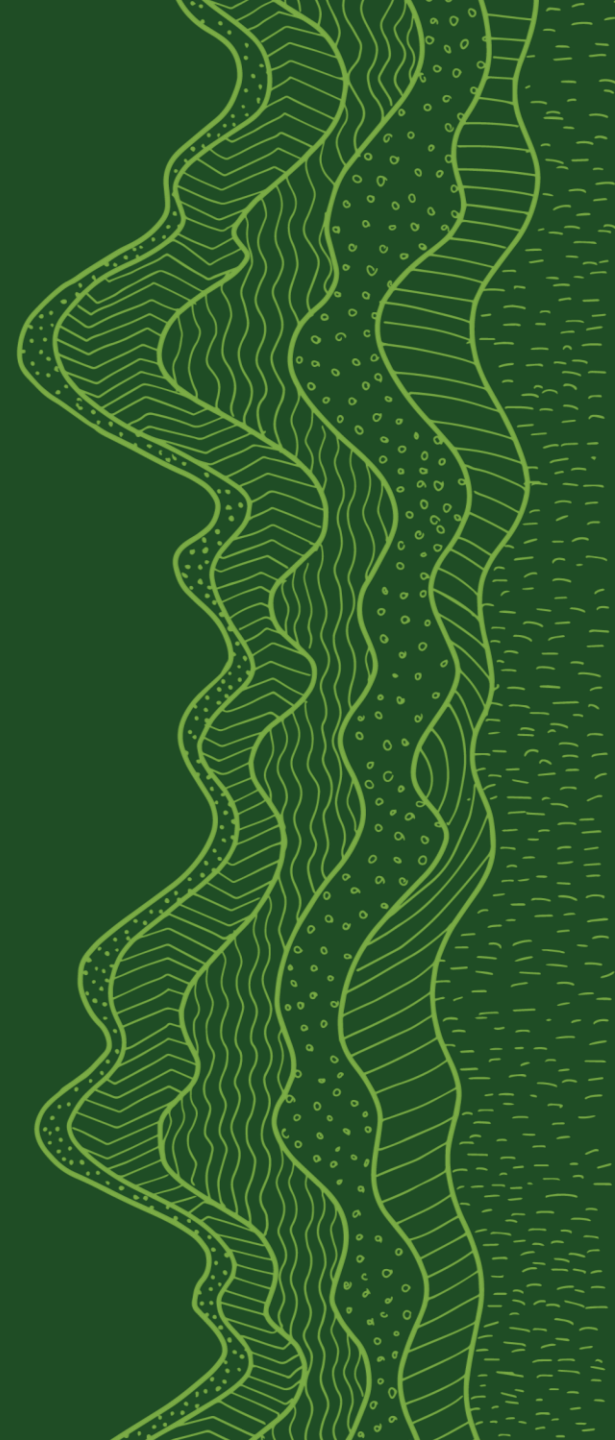


In 2008, Presidio visitors **did not reflect the racial diversity** of the Bay Area.

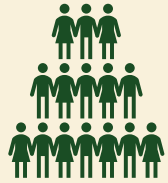


In 2021, Presidio visitors **are tracking more closely to the diversity** of the Bay Area.

2021 SUMMARY



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



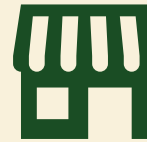
In 2021, **visitation to the Presidio increased to 7.4 million** in part due to the easing of COVID-19 restrictions.



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%.**

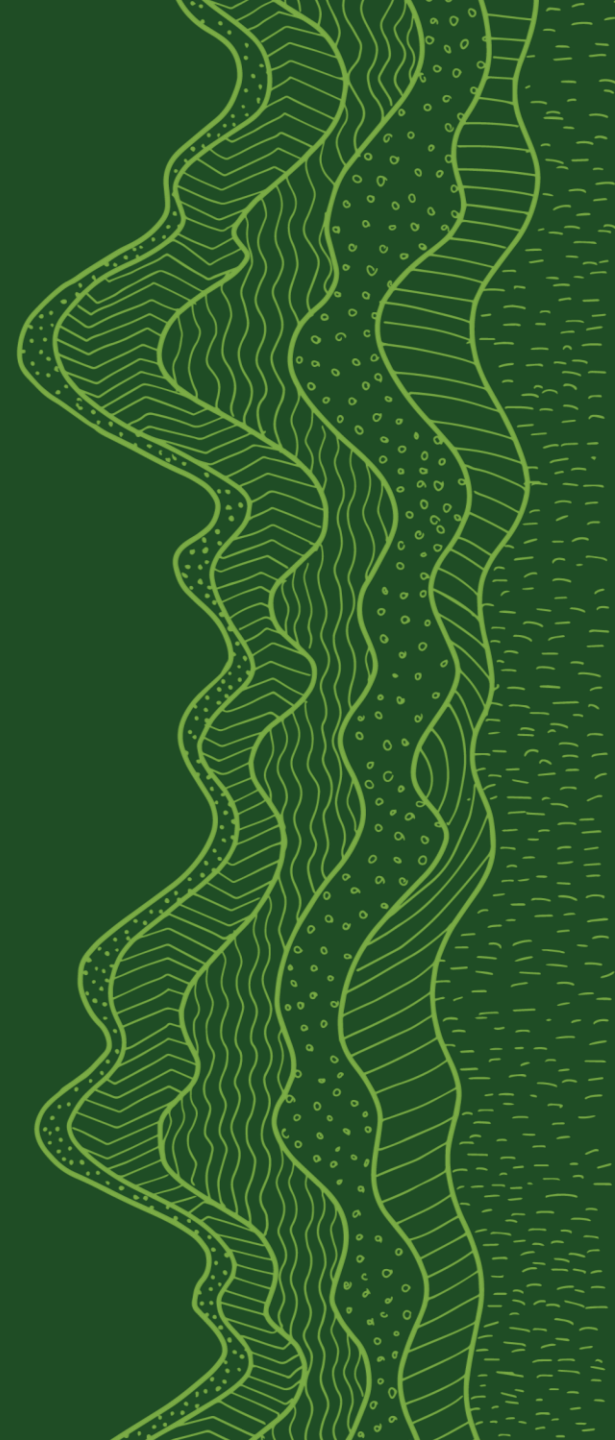


Awareness of the Presidio is growing at 78% among SF Bay Area residents.



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

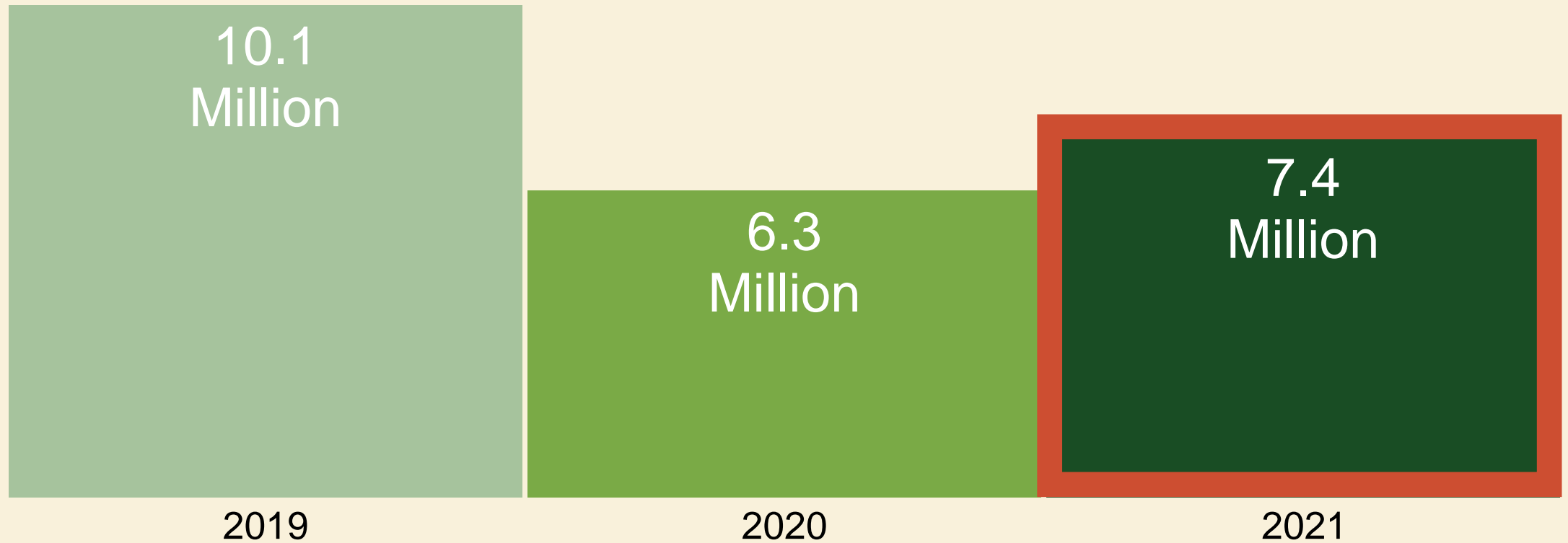
2021 VISITATION VOLUME



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

Visitation to the Presidio (2019-2021)

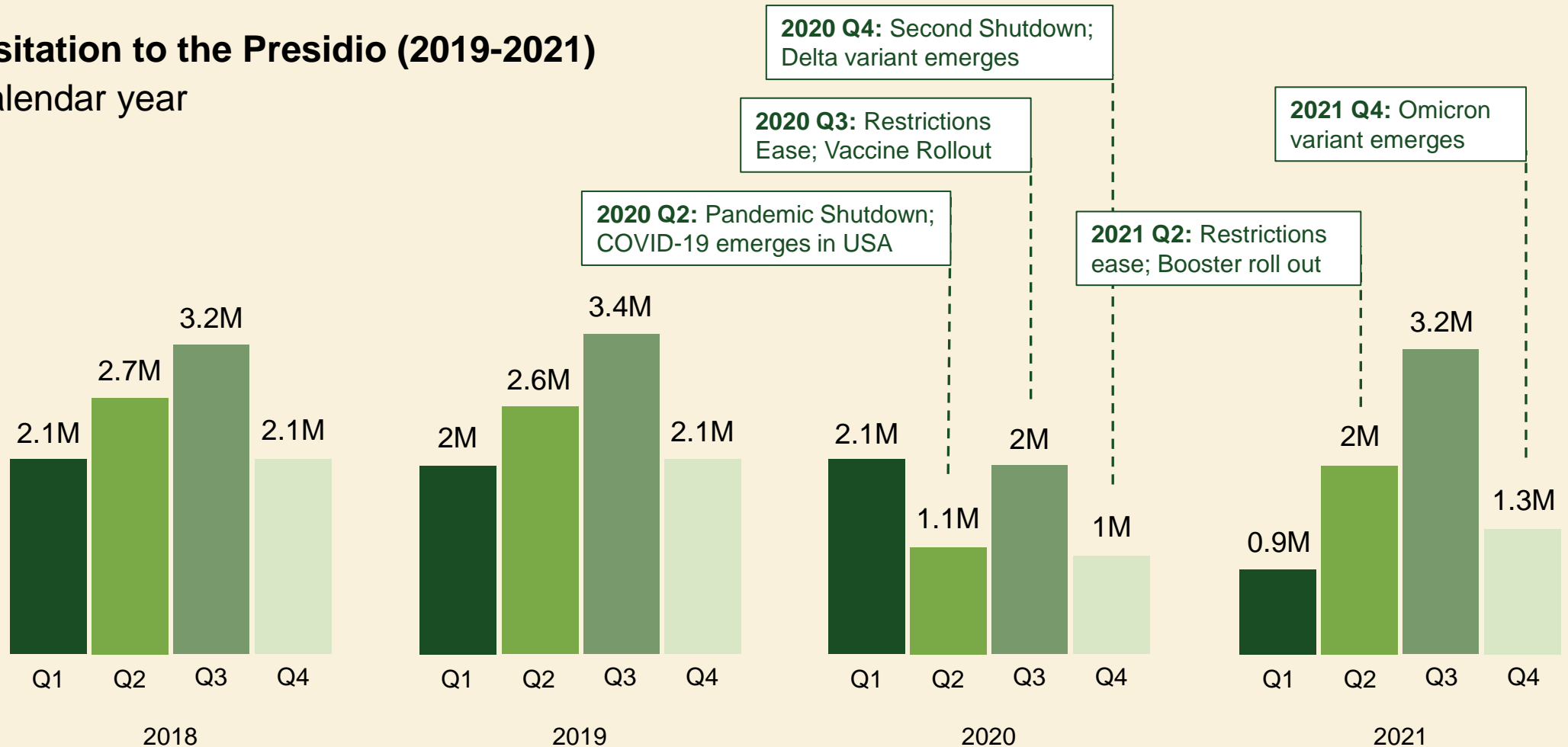
Calendar year



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

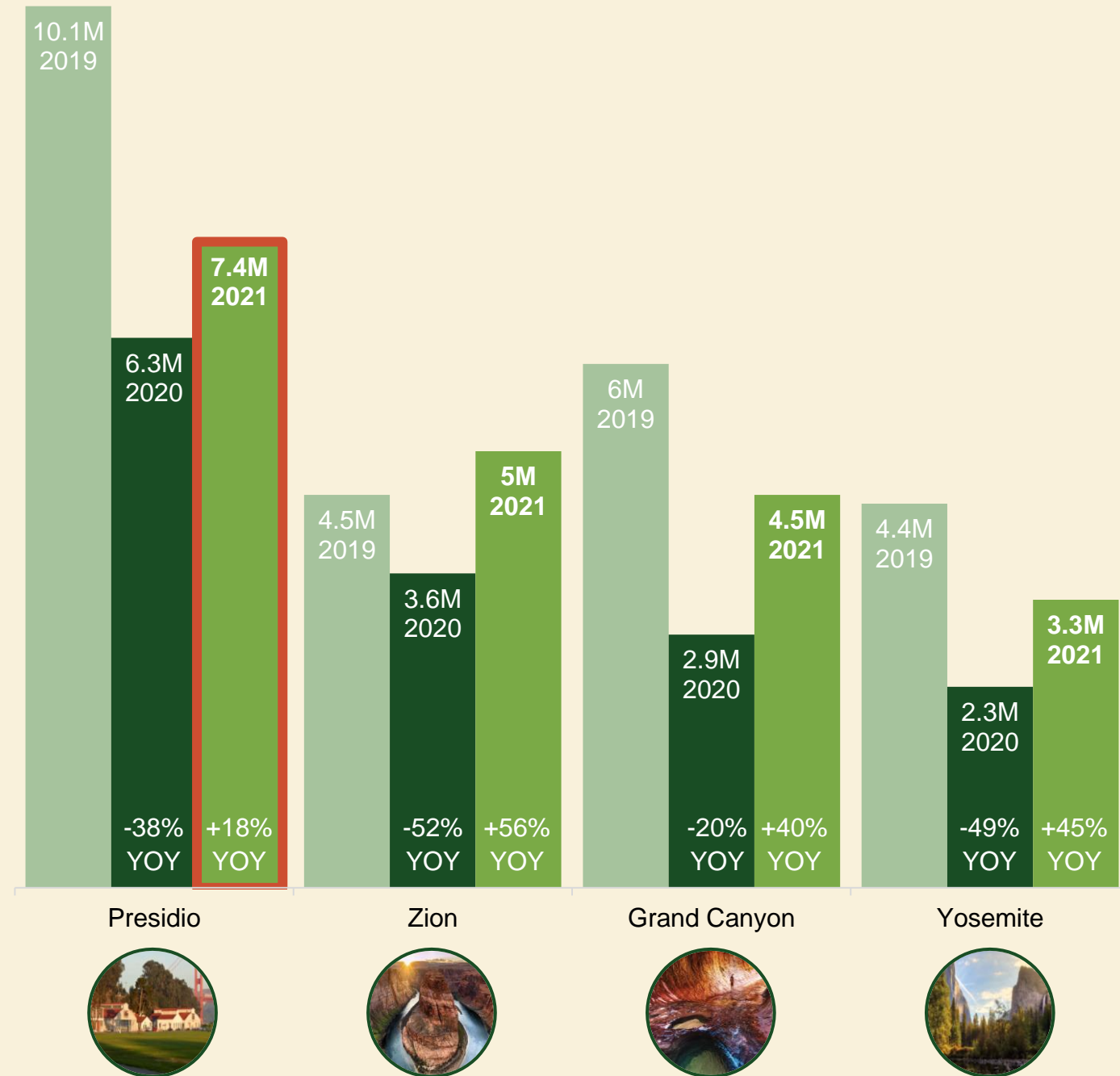
Visitation to the Presidio (2019-2021)

Calendar year

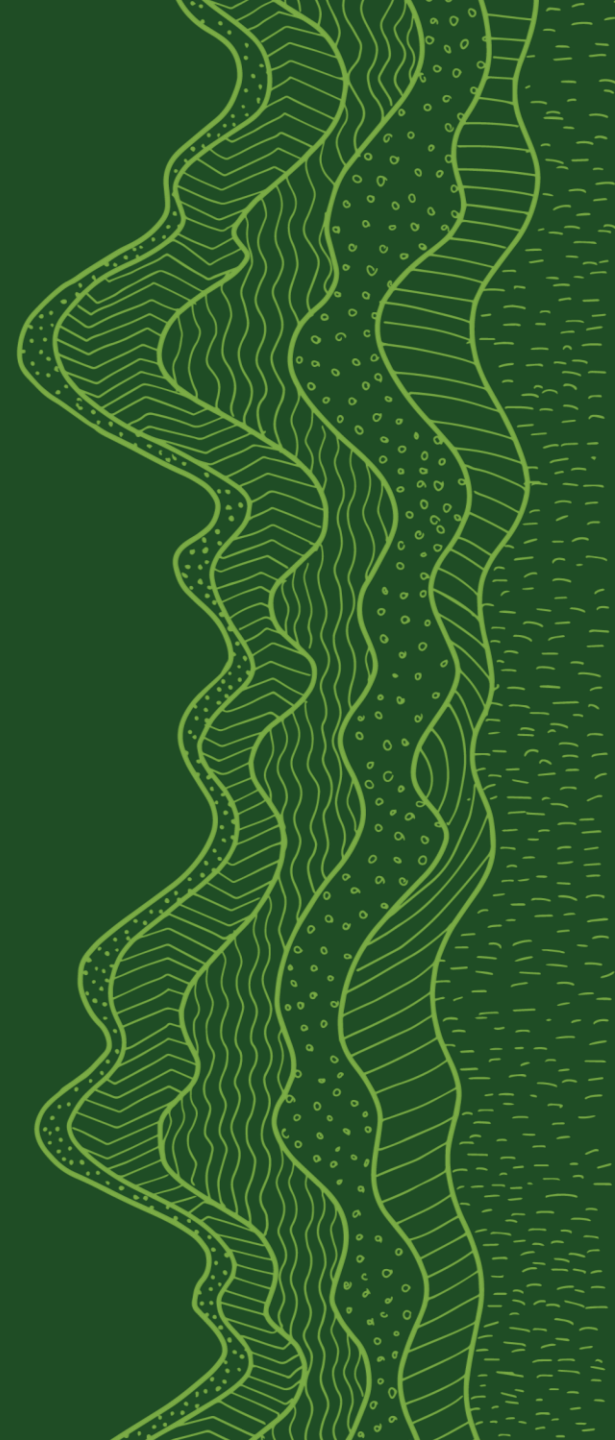


VISITATION ACROSS ALL NATIONAL PARKS IMPROVED IN 2021

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

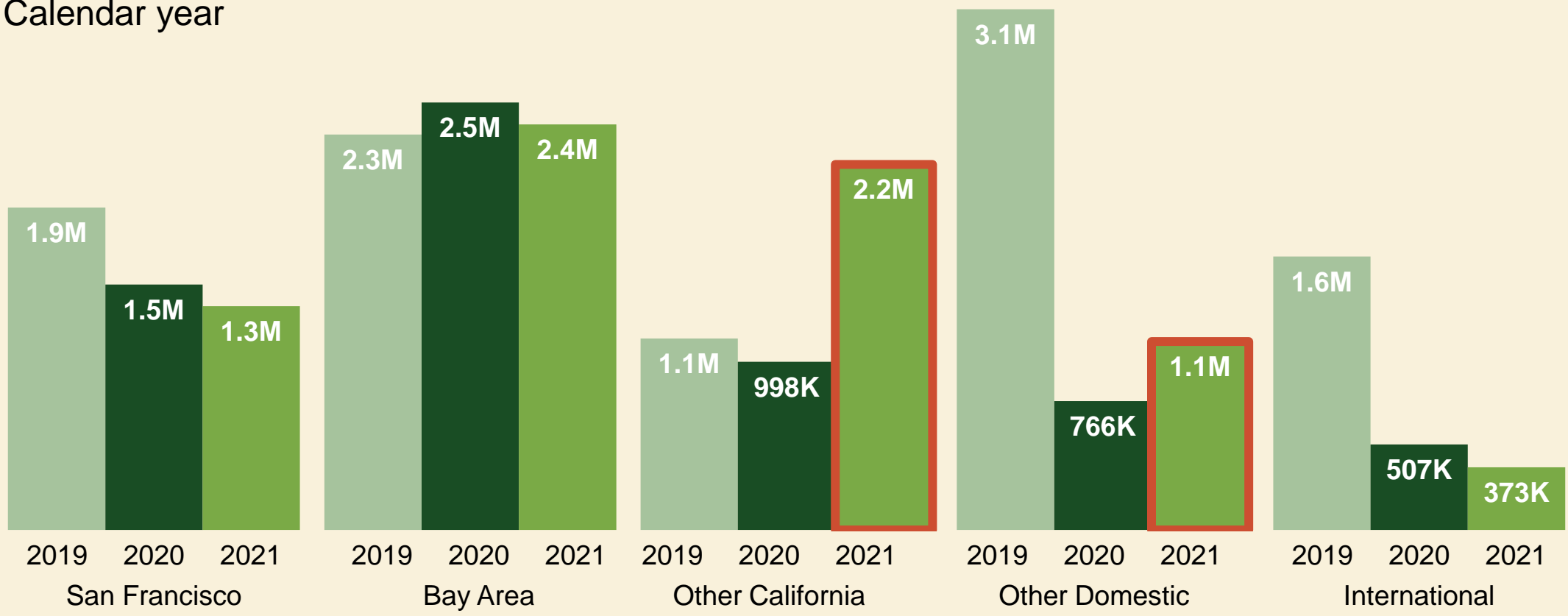


2021 ORIGIN OF VISITORS



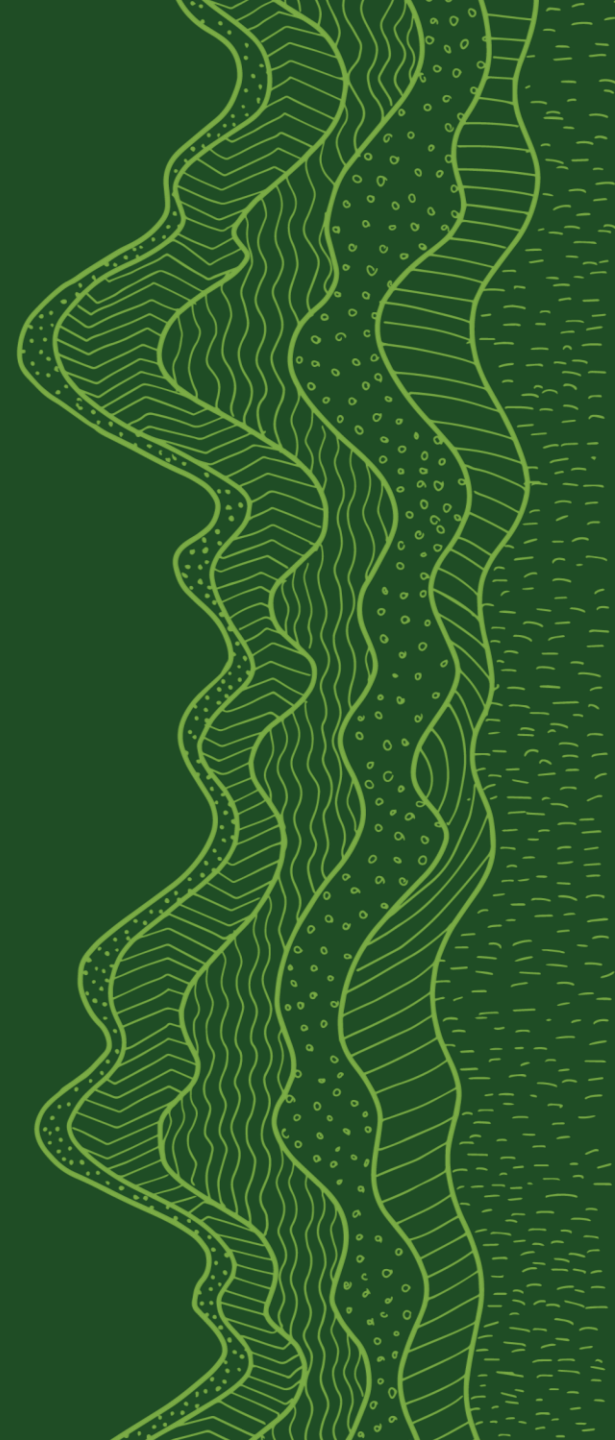
CALIFORNIA VISITATION DOUBLES IN 2021

Visitation to the Presidio (2019-2021)
Calendar year

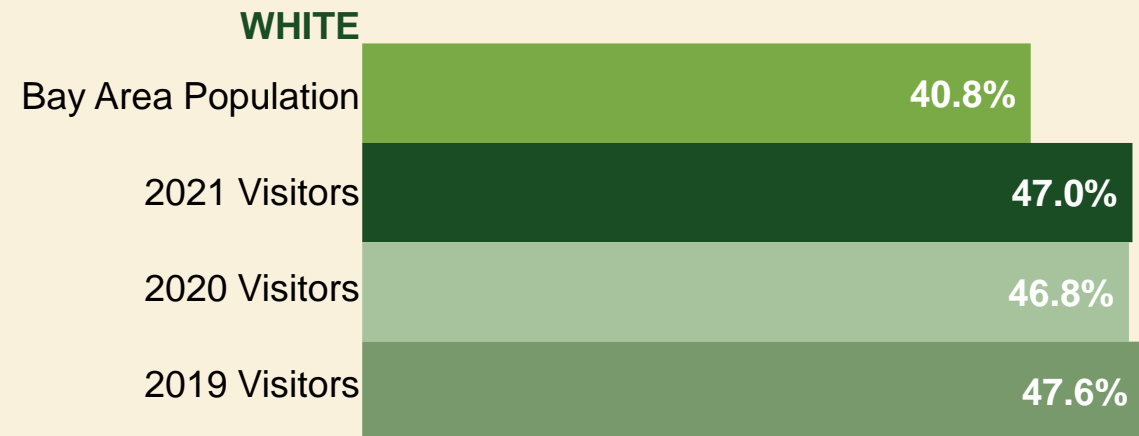
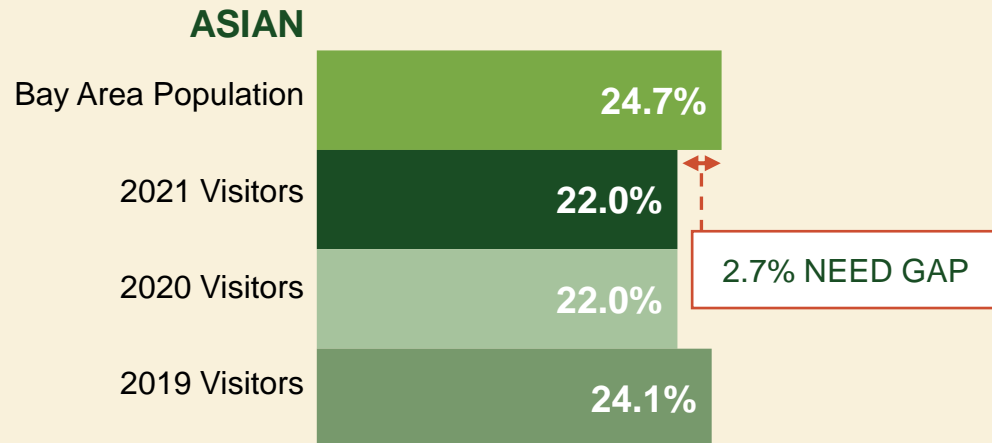
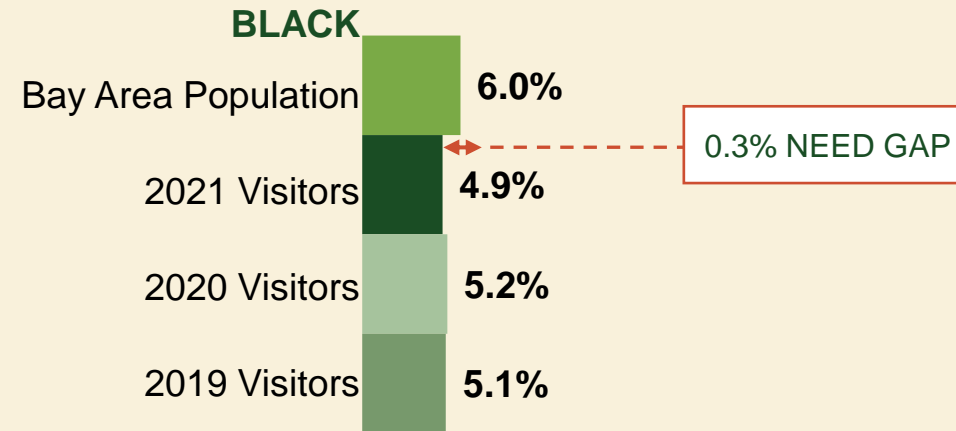
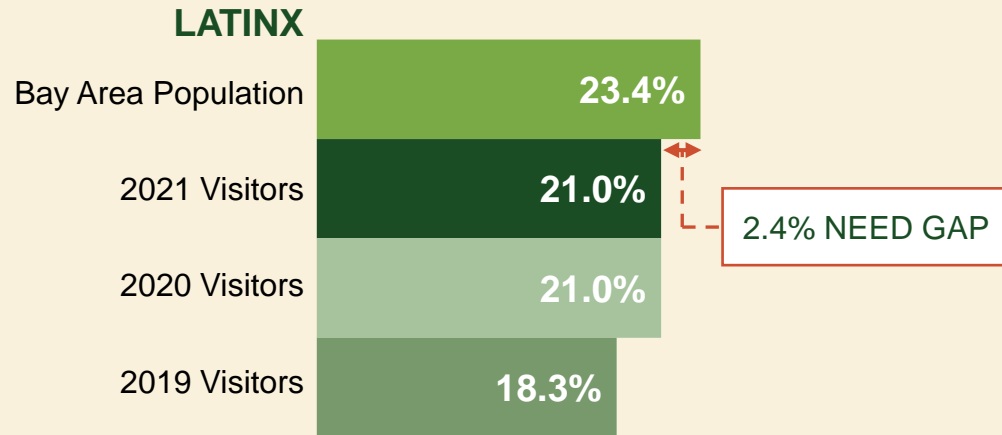


Source: Tourism Economics Visitation Report (2021)

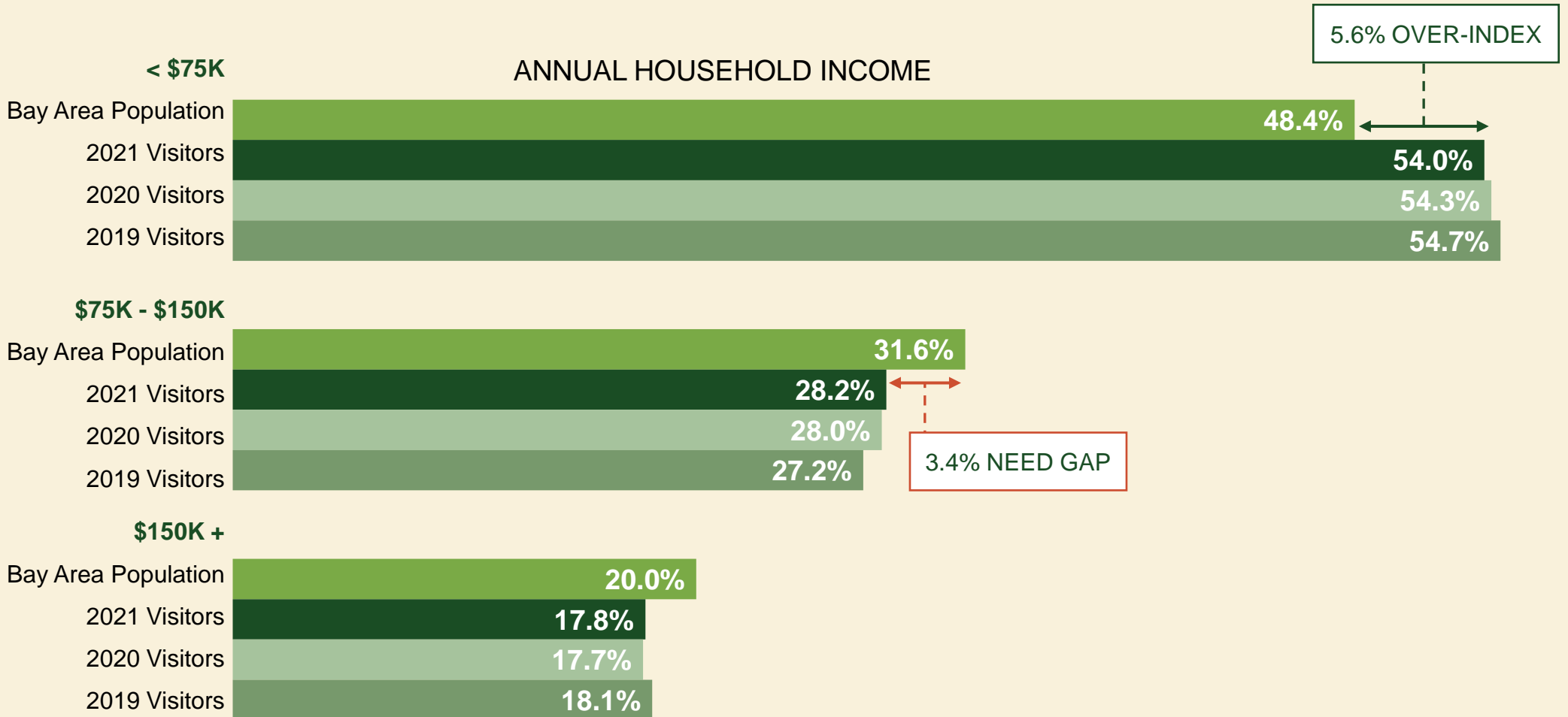
2021 VISITOR DEMOGRAPHICS + SOCIOECONOMIC INFORMATION



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



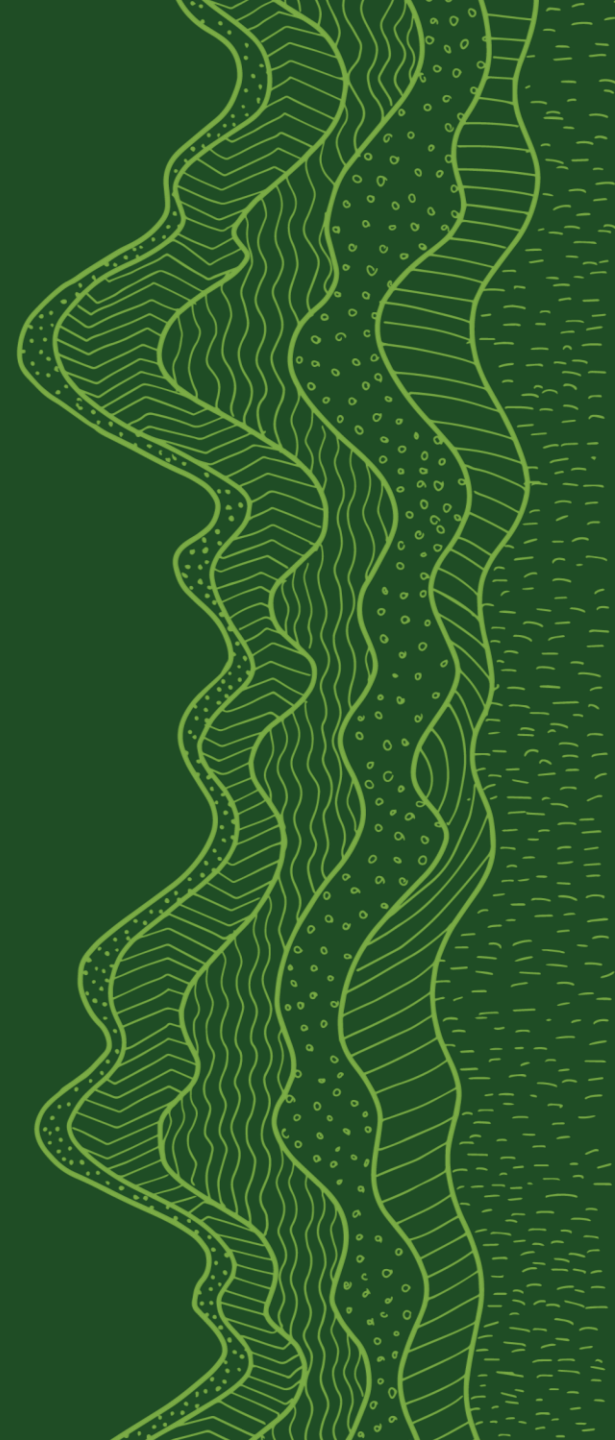
SOCIOECONOMIC PROFILE OF TODAY'S VISITORS CLOSELY ALIGNS TO THE BAY AREA



2021 AWARENESS

+

VISITOR SATISFACTION LEVELS



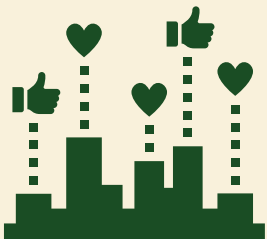
THE PUBLIC'S PERCEPTION OF THE PRESIDIO IMPROVED IN 2021



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?

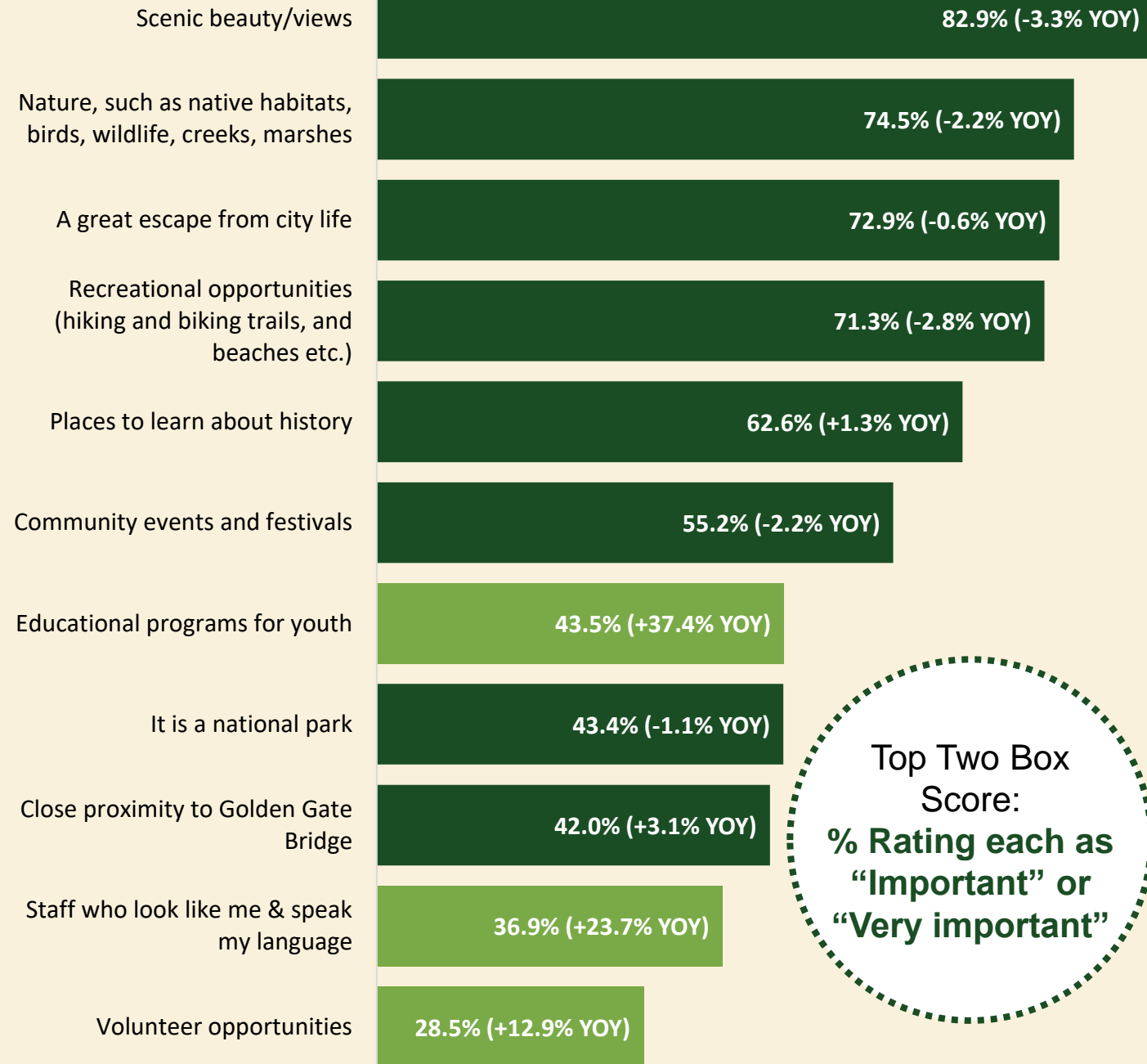


0 1 2 3 4 5 6 7 8 9 10
LESS LIKELY TO RECOMMEND AVERAGE MORE LIKELY TO RECOMMEND

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"

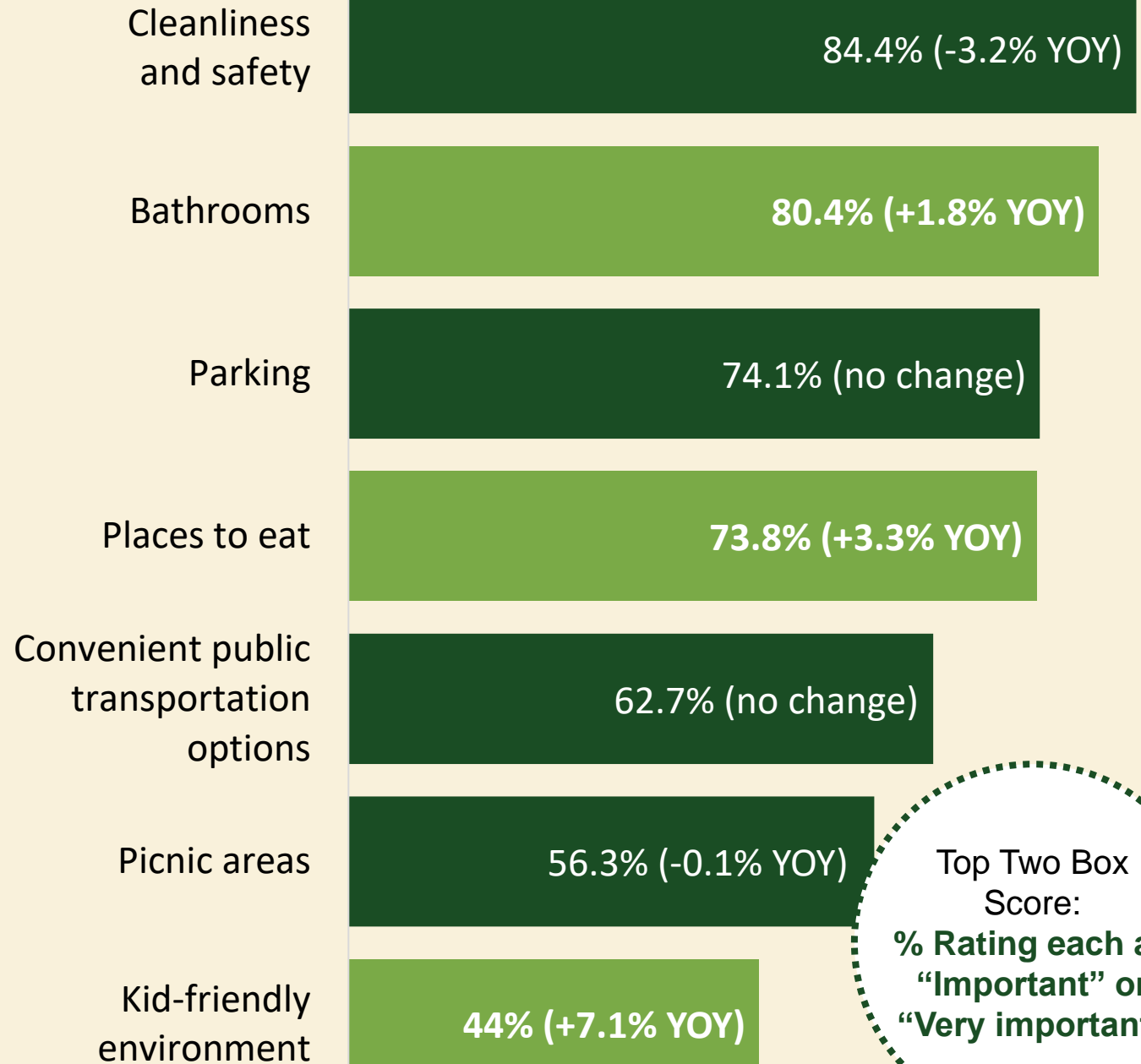
WHAT MOTIVATES VISITORS TO
COME TO THE PRESIDIO IN 2021?



IMPORTANT AMENITIES + PLACE ATTRIBUTES ARE IMPORTANT TO SUPPORTING SUCCESSFUL VISITATION

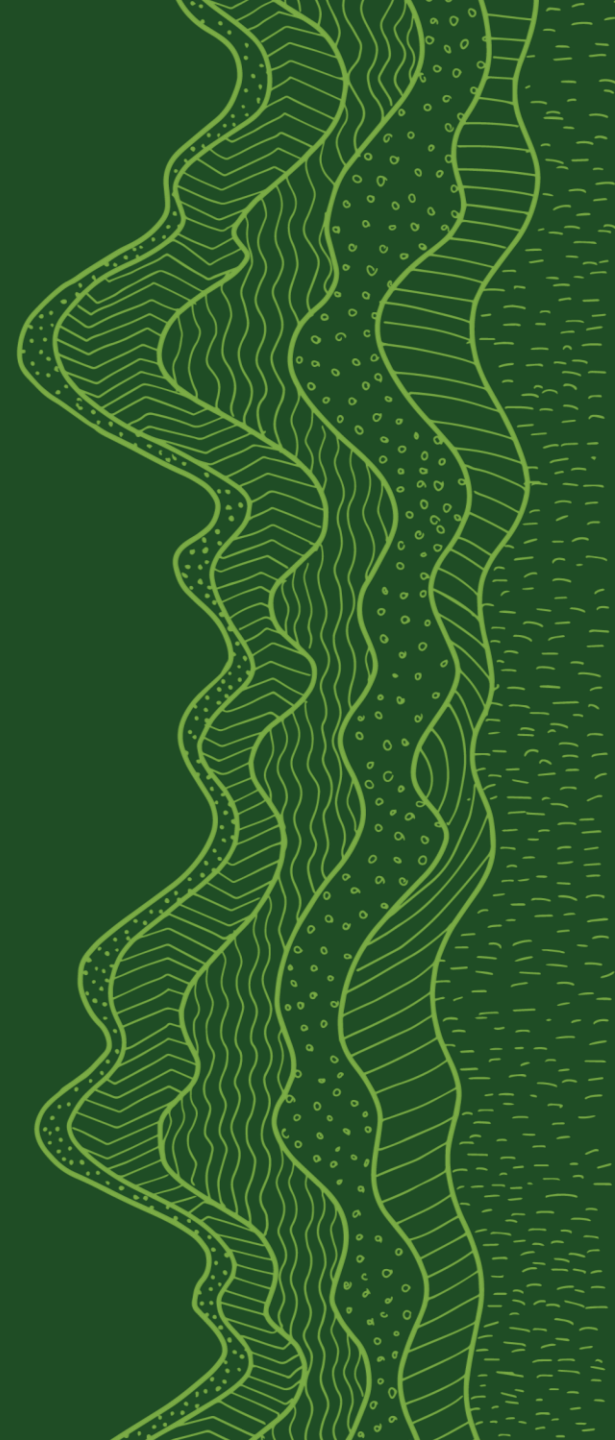
QUESTION: What is most important to you
when choosing to visit a San Francisco Park?

Base: All respondents, 1,200 responses



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

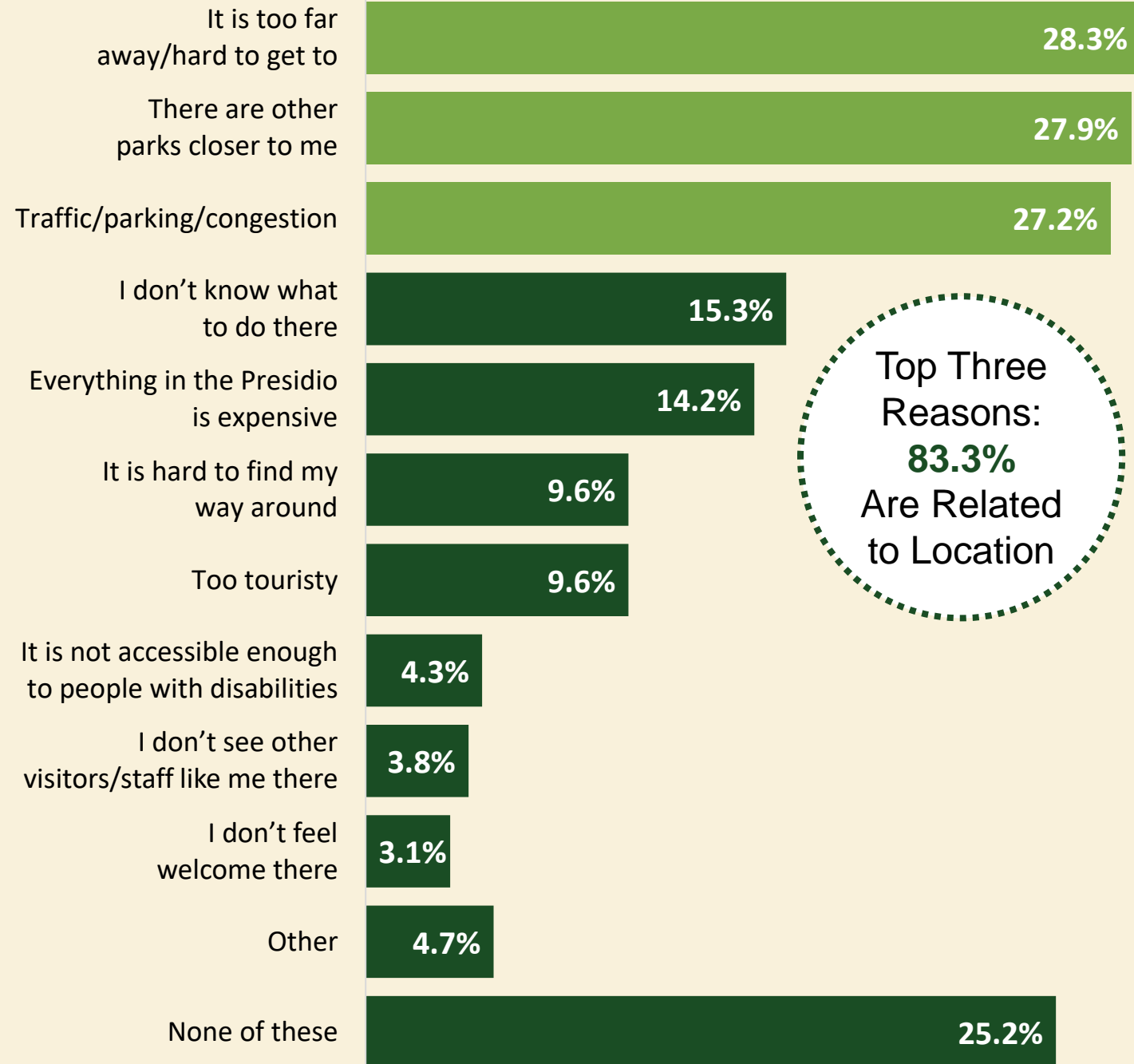
WHAT PREVENTS VISITORS FROM
COMING TO THE PRESIDIO IN 2021?



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

PRESIDIO.GOV

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