

ONE TREASURE ISLAND

Growing an Equitable Park System

Update to the TIDA Board – July 9, 2025



Scope of the Study

Park User Assessment & Strategy

- Info on future park users and anticipated demand
- Explore social goals to encourage equitable park use

Opportunities & Constraints for Nonprofit Partnerships

- Survey the economic viability of nonprofit, philanthropic, and/or grant support of equitable park programming and use

Process and Timeline



Project Status

Completed

- 16 Stakeholder Interviews & Key Takeaways
- Online Visitor Survey (English, Spanish, Chinese)
- Assets, Issues and Opportunities Analysis
- Visitation Study
- Kick-off Work Sessions for Nonprofit Opportunities and Equity Framework



**Take our Community
Parks Survey!**



Park System Baseline



Park System Growth

- 2025-2038
- 2038 on



Urban Farm
Sports Park
Northern Shoreline Park/The Wilds
Expansion of Cityside Park

Figure 1.3.e: Open Space Framework

Roles, Responsibilities and Gaps

- Parks Development: TIDA & TICD
- Parks Maintenance: Rubicon & SFRPD
- Parks Programming and Activation
 - Some programming: One TI and TICD
 - Events permitting: TIDA
 - More programming and activation needed



Key Findings To Date



Visitor Survey

- 146 respondents (54 residents, 26 employees, 66 visitors)
 - Some YBI residents responded (8)
 - Most employees who responded don't live on TI/YBI
 - Most visitors who responded live in San Francisco or nearby
- The majority of respondents usually get to parks by private automobile but also frequently by:
 - Ferry and bus
 - For residents, walking



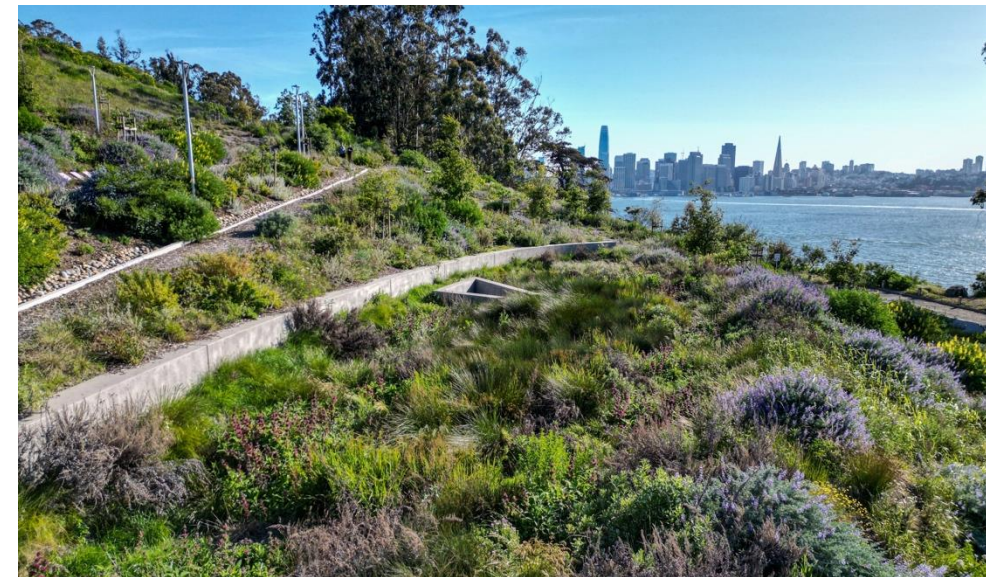
Resident Highlights

- Top reasons for visiting parks
 - Walking, biking, hiking
 - Nature viewing
 - Meeting friends/family
 - Sightseeing
- Top programs: residents
 - Food and beverage events
 - Outdoor movies or concerts
 - Music festivals
 - Arts activities



Visitor Highlights

- Top reasons for visiting parks
 - Walking, biking, hiking
 - Nature viewing
 - Activities/facilities offered by Island providers
- Top programs: visitors
 - Guided nature walks
 - Food and beverage events
 - Arts activities
- Top recreation amenities: visitors
 - Social spaces and amenities
 - Lawn areas
 - Food and drinks vendors
 - Rental bikes and kayaks



Key Assets

- Physical Location
- Amount and Quality of Parks
- Special Features and Facilities
- Individual Strengths of Project Partners
- Active and Effective Organizations in Place
- Programming to Build From

Key Issues

- Transportation
 - To, From, and On TI/YBI
- Dynamic Parks Environment Through Buildout
- Need for More Programming and Activation
- Different Capacity through 2038
- Striking the Right Balance
- Creating a Welcoming and Inclusive Environment

Key Opportunities/Needs

- Local Drop-in Use and Access
- Waterfront Activation
- Mobile/Flexible Programming
- Visitor Information and Wayfinding
- Destination Day Trip
- Future Opportunity: Destination for Nature and Environment Programs



Visitation Study



Methodology

- Identify typology of and development date for each park
- Analyze visitation data from comparable parks
 - 2024 annual visitation from SFRPD for 35 parks spanning the various typologies
 - Additional monthly visitation data collected for 300 other comparable parks spanning the different park typologies through Placer.ai, and the monthly data was extrapolated to annual visitation.
- Identify market segments
- Develop population projections for each market segment
- Develop low, medium and high visitor projections for each typology.

Visitor Market Segments & Park Typologies

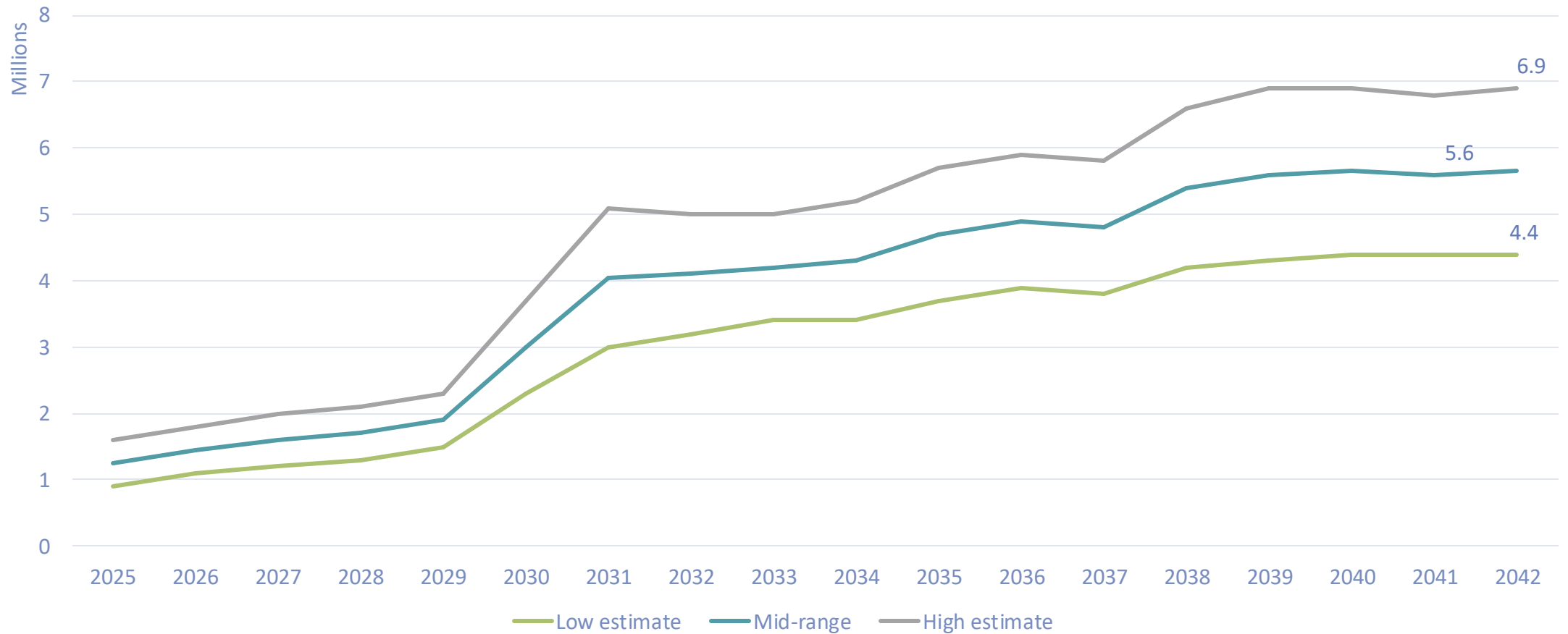
TI-YBI
Residents

SF Bay Area
Residents

Tourism:
Domestic and
International

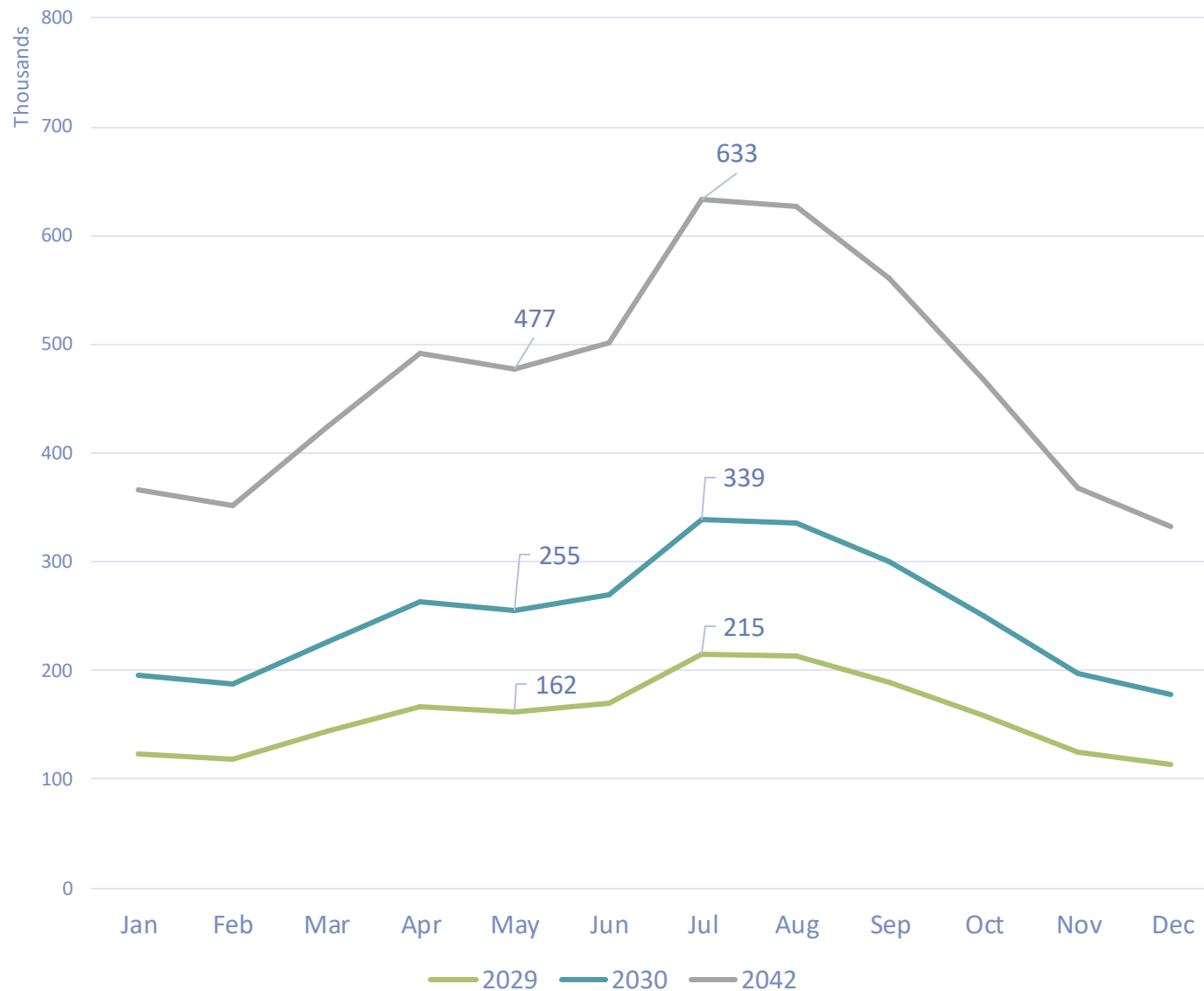
<u>Park Type</u>	<u>TI-YBI Residents</u>	<u>Bay Area</u>	<u>Other CA & Tourist</u>
Dog	●	◐	○
Urban Farm	●	●	○
Plaza	●	●	●
Garden/Scenic/Trails	●	●	●
Sports	●	●	○
Neighborhood	●	●	○

Total Projected Visitation



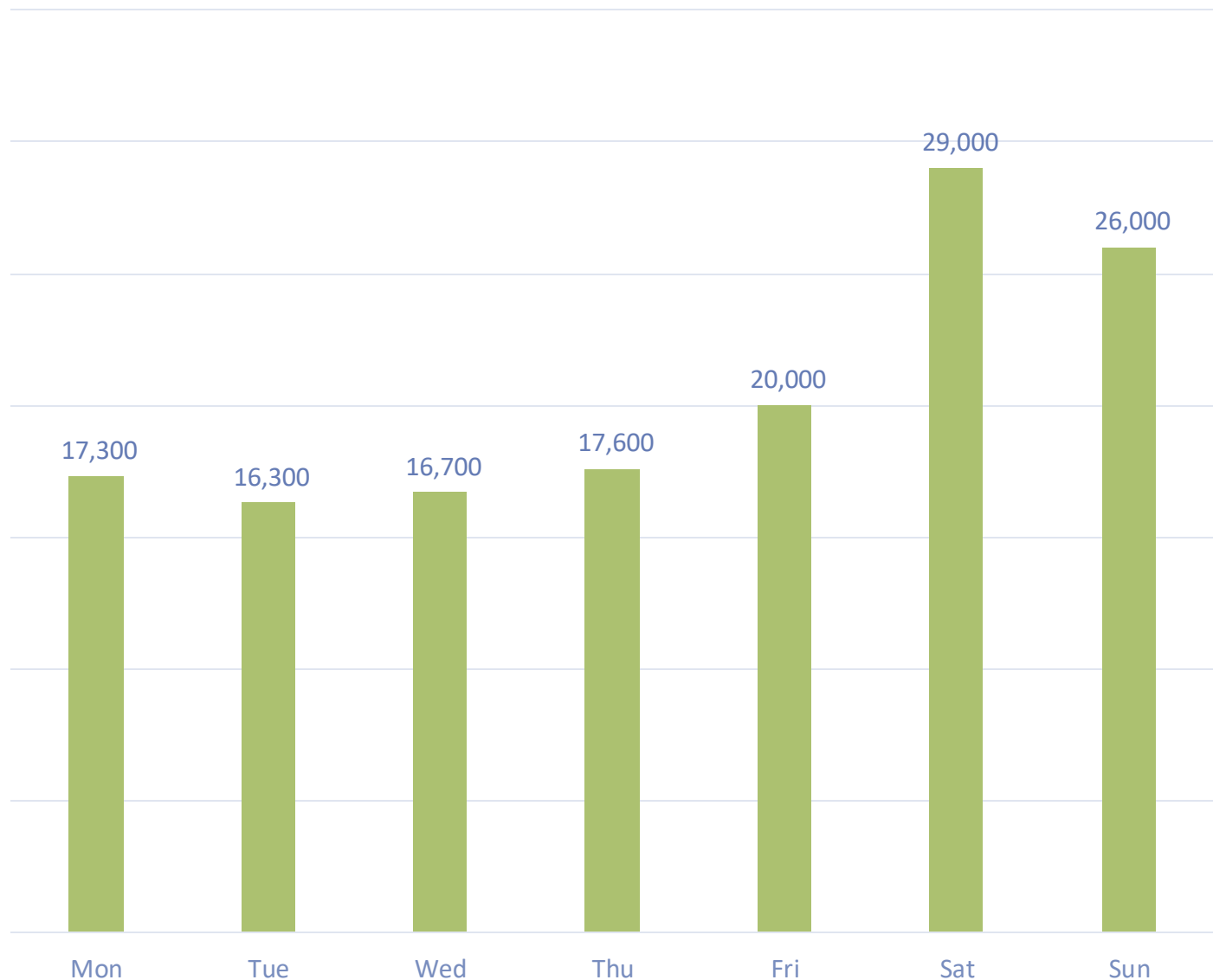
Monthly Visitation (for selected years)

- Based on monthly distribution for Tunnel Tops
- Peak months are July and August
- Average months are May and October
- Some park typologies will have different distributions



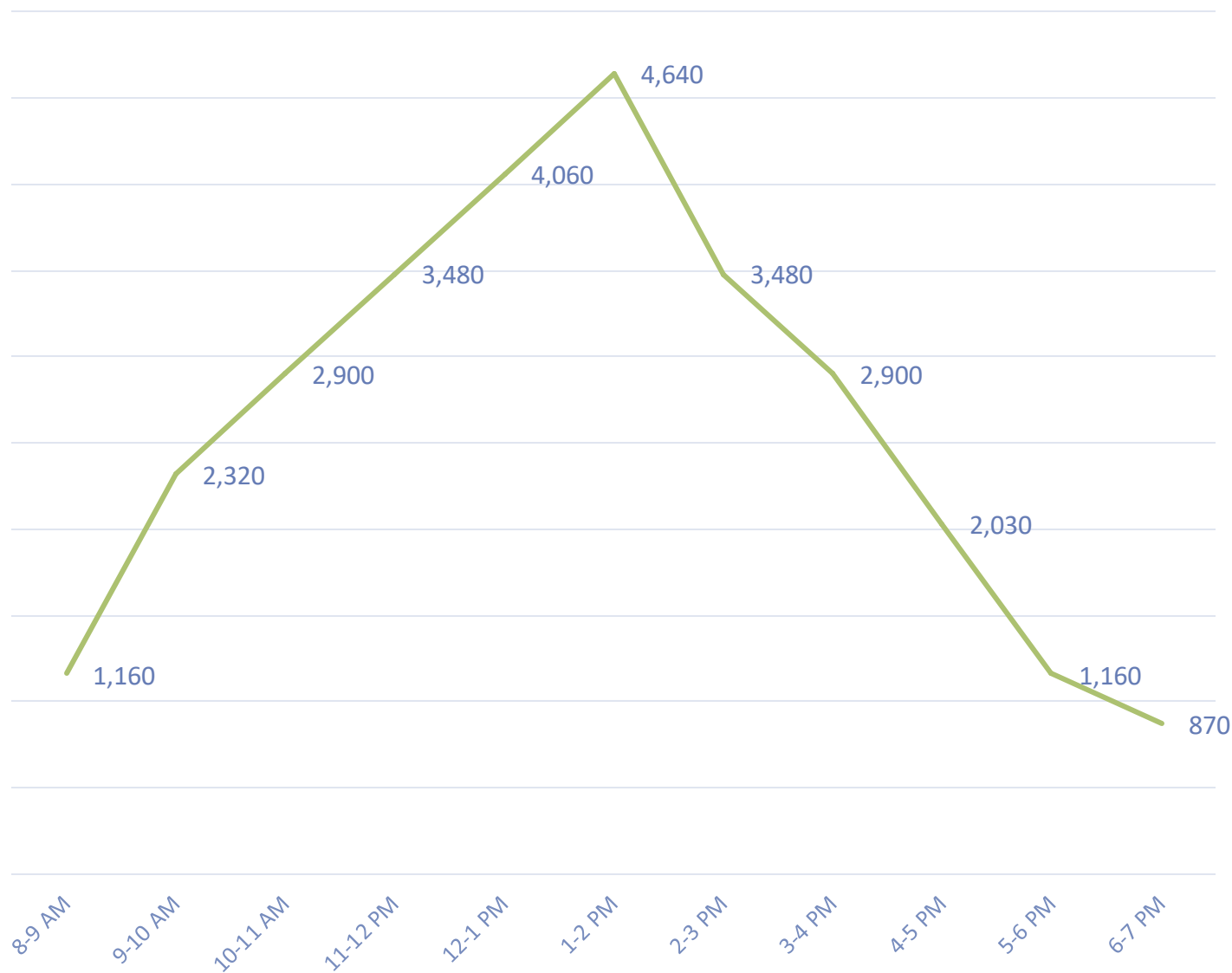
Average Daily Visitation: July 2042 (Mid-range Projections)

- Weekend days are 56% higher than weekdays
- July Saturday (29,200) is very close to a Design Day visitation level



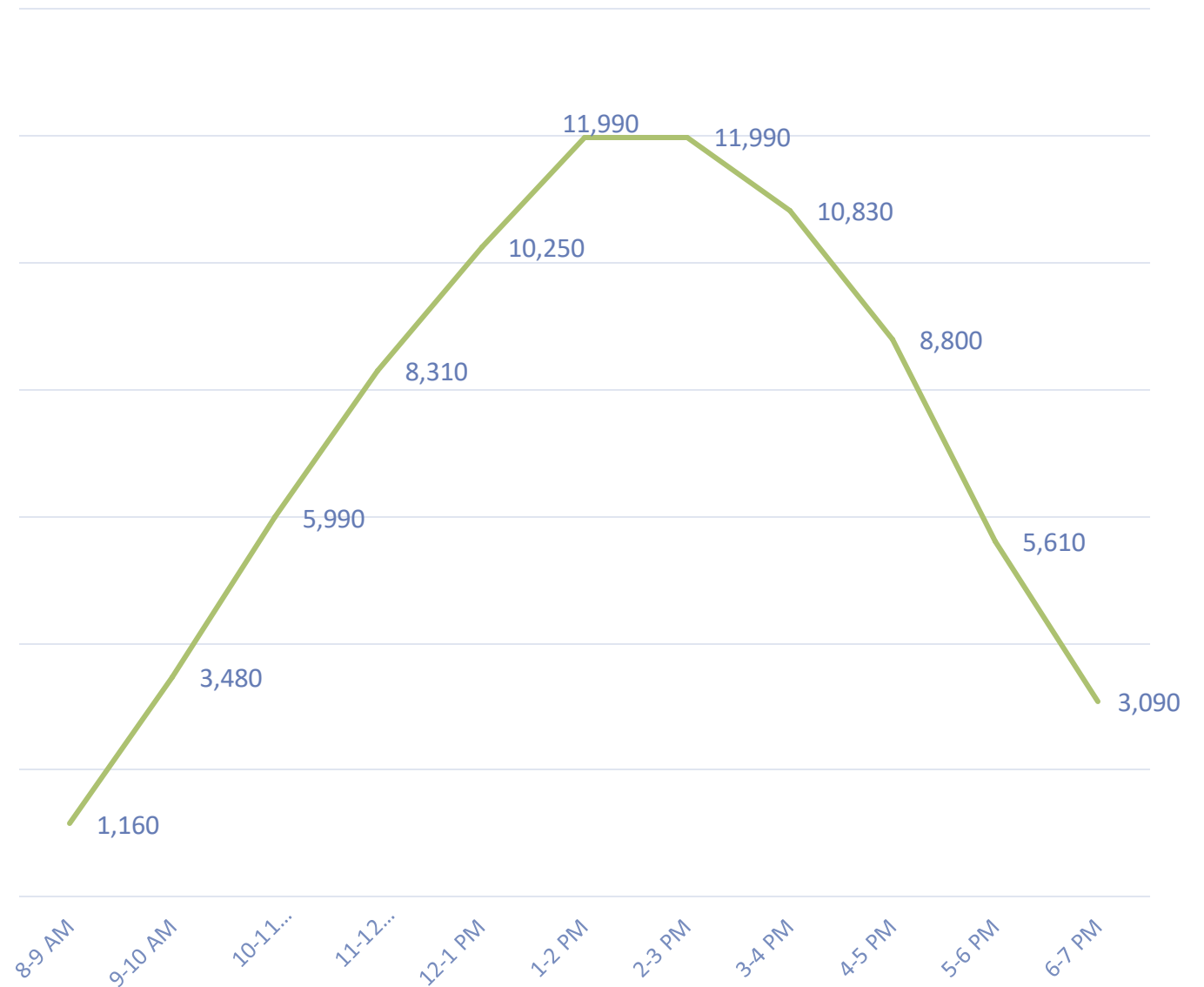
Hourly Arrivals to Parks:

Average July Saturday 2042



of Visitors in TI/YBI parks at one time Average July Saturday 2042

- Peak period of the day is 1 to 3 PM with 12,000 visitors at the Island parks



Key Takeaways: Local and Regional Visitors

- Neighborhood park typology
 - Primarily used TI/YBI residents
 - Visitation based on national survey data
- Sports park typology
 - Heavy use by TI/YBI residents
 - 10-15% of visitation from Bay Area visitors
- Dog park typology
 - Primarily used by TI/YBI residents



Key Takeaways: Urban Farm Parks

- 11 comparables
- Visitation varies depending on type
 - Farming focus: primarily staff, workers, and volunteers
 - Programs focus: Actively promote visitation, offer events and programs. Attracts more visitors from a larger area.
- Big variance between low and high estimates
 - To account for both urban farm park types
 - To account for size variation



Key Takeaways: Tourist Segment

- Most appeal
 - Garden, scenic and trail parks
 - Plaza parks
 - Urban core parks
- The other park typologies are assumed to draw few tourists
- 30% assumption based on Presidio visitation
 - Out of area tourists: 42% of total visitation in 2019 and 46% in 2021.
 - For TI/YBI, projections assume that the garden, scenic, trail, plaza, and urban core parks will experience about 30% of their visitation from tourists.





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