

Balboa Park Benefits Study

How San Diego's Crown Jewel Impacts the Economy, Environment, Equity and More



Source: Balboa Park Online Collaborative



SAN DIEGO STATE
UNIVERSITY
L. Robert Payne School of
Hospitality & Tourism Management



BALBOA PARK
CONSERVANCY

Balboa Park Benefits Study

September 2017

Prepared for the Balboa Park Conservancy by the L. Robert Payne School of Hospitality and Tourism Management at San Diego State University, and generously funded by the Albert A. and Anna Belle C. Gabbs Balboa Park Fund at The San Diego Foundation 🌍.

Written by Mark R. Testa, Ph.D., Carl Winston, Tia Hilmer, Ph.D., and Alana Dillette, Ph.D., with the help of faculty, staff, and students at San Diego State University.





The Balboa Park Conservancy is pleased to present this baseline study that identifies and quantifies the many and diverse economic benefits derived from Balboa Park. We know that our lives would be less enriched without the park and we instinctively understand that the park is an economic engine and touristic asset in our region. This study undertakes a careful analysis of some of the park's most important impacts, helping us more clearly understand the value of Balboa Park on our regional economy.

The Conservancy is acquiring and documenting data of existing conditions within Balboa Park to better manage, sustain and enhance the park. This study is part of an ongoing series of data-driven studies which include inventories and analysis of the existing park signage, trees and documentation of the cultural landscape.

This study goes well beyond a simple analysis of the number of out of town visitors who come to San Diego primarily to visit the park and the value of their hotel stays and other spending. The researchers also identified the economic impact of the many people who work and volunteer in the park. They found enormous value in direct recreational activities and its impact on health and wellness. The park enhances the real estate values of those properties located nearby or adjacent.

By its very nature, a baseline study invites extra review and scrutiny. To that end we asked the economists at the Center for City Park Excellence at the Trust for Public Land to provide a peer review of the study and they affirmed the methodology and outcomes. We are confident that this report will bear out what many of us already know, Balboa Park is important and valuable.

The Conservancy hopes that this study's outcomes will help as we advocate for the greater good in Balboa Park, encouraging the kind of investment that our extraordinary community asset requires to be sustained and thrive. We also look to the future as we envision a fully implemented master plan for the park, anticipating an even greater return on investment through tourism impacts, and enhancing the quality of life and visual character of our community.

Jacqueline Higgins, Director of Planning, Design and Programs oversaw this project for the Conservancy. We are very grateful to the team of researchers at the Payne School of Hospitality and Tourism at San Diego State University led by Professor Carl Winston. We also gratefully acknowledge the financial support of the Albert A. and Anna Belle C. Gabbs Balboa Park Fund at The San Diego Foundation. We appreciate the valuable input provided by the many park stakeholders and institutions and the careful guidance of the Conservancy's Board of Trustees.

Tomas Herrera-Mishler
CEO and President

Carol Chang
Board Chair

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I. Executive Summary

Balboa Park is an economic engine that powers tourism, recreational and cultural experiences for millions of visitors, and it is a major beneficiary of strong community support. Even excluding the tremendous benefits that the San Diego Zoo brings, Balboa Park has a strong economic impact on the City of San Diego.

This report is based on an assessment of Balboa Park conducted by faculty and students at San Diego State University. Research, including surveying over 2,200 park users, took place between August 2016 and August 2017.

Highlights of our findings include:

- Economic Impact is \$356.4 million annually. This number resulted from spending by park users who visit from outside San Diego on lodging, food, shopping, entertainment, and transportation, both in and around Balboa Park and in San Diego as a whole. These travelers generated 311,650 hotel room nights as well as \$6.7 million in hotel taxes and \$3.2 million in local sales tax.
- Employment impact is \$52.9 million annually, which includes employment at the many cultural institutions as well as city staff maintaining the gardens and recreational spaces inside Balboa Park. The park employs more than 1,113 positions total (full and part-time), as well as more than 13,500 contractors in a wide variety of roles—from maintenance to performers.
- An estimated 2,046,000 visitors from outside San Diego (43.7%) and 2,635,922 local residents (56.3%) use Balboa Park annually, with locals using the park a median of 10 times per year, yielding up to 28.4 million total visits per year.
- Direct recreational use value is \$111.5 million annually, which is determined by calculating what it would cost visitors and residents if Balboa Park did not offer the vast active and passive public spaces, particularly its most popular recreational uses, in the 1,200-acre park.
- Real estate impact is \$92.5 million, which includes both the increased real estate values of residences near or on the borders of the park that have higher values versus the average values for the city, and the additional real estate taxes these higher values generate.



Kevin Faulconer
Mayor of San Diego

“Balboa Park is San Diego’s crown jewel and is appropriately located in the heart of America’s Finest City. From the 1915 Panama-California Exposition to the annual December Nights festival, Balboa Park has been the central gathering place for generations of San Diegans and remains a source of inspiration for locals and visitors for its many recreational and cultural offerings. It’s nearly impossible to comprehend how invaluable this iconic park has been to San Diego’s emergence as a world-class city other than to say. . .

San Diego simply isn’t San Diego without Balboa Park.”

- Health impact is \$44 million annually, which counts the 40,013 adults that use the park as their primary recreation site, saving \$1,100 each in medical costs per year.
- Environmental impact is \$390,695 annually, accounting for the carbon dioxide capture as well as storm-water capture by the park’s trees, vegetation, and ground cover.
- Youth benefits are many and varied, including the park playgrounds and recreational spaces, as well as the special array of programs and services offered by the many cultural institutions operating in the park’s buildings and grounds.

Table 1: Summary of Balboa Park Impacts

Category	Estimated Impact
Economic Impact	\$356.4 M
Employment Impact	\$52.9 M
Direct Recreational Use Value	\$111.5 M
Real Estate Impact	\$92.5 M
Health Impact	\$44 M
Environmental Impact	\$390,695



II. Balboa Park: Why Is It Important?

Balboa Park is a jewel of a city park, originally established in 1868 and largely developed for the 1915 Panama-California Exposition. It was named a historic national landmark in 1977. In 2017, *Travel + Leisure* magazine ranked the park number 10 in a list of the most beautiful city parks in the world. The park is home to 18 museums, several performing arts venues, lovely gardens, and a host of cultural and recreational attractions, including the San Diego Zoo. With 1,200 beautiful and diversely planted acres, Balboa Park is the nation's largest urban cultural park, attracting over 4.6 million unique users annually.

The Balboa Park Conservancy commissioned this analysis to determine the real economic, health, and community benefits of the park. The Conservancy's goal for the study is to tell the story and show how Balboa Park is an asset deserving of more investment and not a liability requiring spending with little return.

Balboa Park is an important destination for a tremendous number of tourists as well as local residents who all enjoy the many concerts, museums, educational activities, and stunning landscapes and architecture. Balboa Park serves as an economic engine for the city, enhances residents' quality of life, and is a magnet for tourists, thanks to the Zoo, first-class cultural institutions, and well-maintained gardens and landscaping.

We at The Payne School at San Diego State University created this analysis based on work conducted by subject-matter experts who quantify the benefits of major parks to municipalities. Our approach built on those sources, adapting them to tell the unique story of Balboa Park's positive economic impact.

For more than 10 years, The Payne School has conducted the majority of touristic economic impact studies in the region. These studies help touristic facilities and events address questions from local organizations, sponsors, donors, etc., who want to know more about the tourism landscape from an objective third party.

The Payne School is also deeply rooted in the parks and recreation discipline and has focused on this for nearly 50 years. In fact, SDSU alumni hold leadership roles throughout the region's parks and recreation organizations.

This study was designed to determine impacts in the following areas:

1. Economic, from tourism
2. Employment
3. Direct recreational use value
4. Real estate appreciation
5. Environmental benefits
6. Health benefits
7. Child/youth benefits



It is important to note that the San Diego Zoo is not included in this study, even though it is a critical component of Balboa Park’s operations, visitor experience and identity. The San Diego Zoo was excluded for two reasons:

1. The Zoo has conducted its own detailed and comprehensive economic impact study several years ago.
2. The Zoo is so large and comprehensive its figures would distort the importance of the rest of Balboa Park.

This report balances data-driven findings with the incredible passion and enthusiasm at both the organizational and individual levels. Our interviews with park visitors, employees, and volunteers show that there is a deep emotional connection to the park.

Methodology

Both primary research (data gathered directly using a variety of methods) and secondary research (conducted by others) were used in this study. The benefit of a blended approach is a broader scope of analysis that is stronger because of the validation from similar studies.

Our specific methods included the following:

- An extensive literature review in each area of study
- Primary and secondary data analysis assessing the various components of the study
- A survey of over 2,200 local and nonlocal park attendees over twelve months (August 2016–August 2017)
- Structured and semi-structured interviews with more than 40 stakeholders from museums, performing arts venues, recreational operations, etc. (visitors, staff, leadership)
- Website and annual report review
- A review of information provided by various Balboa Park entities
- San Diego Tourism Authority (SDTA) data
- San Diego Commission for Arts and Culture (SDCAC) data
- A review of IRS 990 data for various Balboa Park entities

Balboa Park’s impact is the result of a collaboration between the City of San Diego Parks and Recreation Department and many independent organizations. More than 80 organizations in the park run everything from museums and performing arts venues to gardens and athletic facilities. This collaboration is what makes Balboa Park so unique and so well loved by a large cross-section of the greater San Diego community.

In each of the seven sections of this report, a detailed explanation of methodology is provided. The end result is seven empirical studies combined to tell the full story of Balboa Park. Figure 1 illustrates the vast number of entities, other than the Zoo, that make up Balboa Park.



Figure 1: Balboa Park Cultural Institutions, Amenities, and Programs

<p>Museums</p> <ul style="list-style-type: none"> • Centro Cultural de la Raza • Fleet Science Center • Japanese Friendship Garden • Marston House • Mingei International Museum • Museum of Photographic Arts • San Diego Air & Space Museum • San Diego Art Institute • San Diego Automotive Museum • San Diego History Center • San Diego Model Railroad Museum • San Diego Museum of Man • The San Diego Museum of Art • The Veterans Museum at Balboa Park • theNAT: San Diego Natural History Museum • Timken Museum of Art • WorldBeat Center 	<p>Performing Arts</p> <ul style="list-style-type: none"> • Bon Temps Social Club • Civic Dance Arts • Marie Hitchcock Puppet Theater • San Diego Civic Youth Ballet • San Diego Junior Theatre • San Diego Youth Symphony • Spreckels Organ Pavilion • The Old Globe Theater 	<p>Gardens</p> <ul style="list-style-type: none"> • 1935 (Old) Cactus Garden • Alcazar Garden • Australian Garden • Botanical Building • California Native Plant Garden • Casa del Rey Moro Garden • Children's Ethnobotany Garden • Desert Garden • Florida Canyon Native Plant Preserve • Japanese Friendship Garden • Marston House Garden • Palm Canyon • Rose Garden • San Diego Botanical Garden Foundation • San Diego Floral Association • San Diego Zoo Botanical Collection • Trees for Health Garden • Veterans Memorial Garden • Zoro Garden 	<p>Food & Beverage</p> <ul style="list-style-type: none"> • Alaska Airlines Flight Path Grill • Albert's Restaurant • Café Mingei • Craveology • Daniel's Coffee Cart • Dinosaur Café • Home Plate Bar & Grill • Lady Carolyn's Pub • Panama 66 • Snack Carts • The Prado at Balboa Park • The Tea Pavilion • Village Grill • Food Truck Fridays
	<p>Attractions</p> <ul style="list-style-type: none"> • Balboa Park Carousel • Balboa Park Miniature Railroad • Balboa Park Visitors Center • House of Pacific Relations Int'l Cottages • Photographic Arts Building • San Diego Zoo • Sefton Plaza • Spanish Village Art Center • United Nations Building 	<p>Park-Wide Events</p> <ul style="list-style-type: none"> • Earth Day • San Diego Rock 'n Roll Marathon • America's Finest City Half Marathon • San Diego Pride • December Nights • Foot Locker CC Championships 	<p>Recreation</p> <ul style="list-style-type: none"> • Balboa Park Activity Center • Balboa Park Golf Complex • Balboa Park Senior Lounge • Balboa Tennis Club • Dancing in Balboa Park • Electriquette Wicker Carts • Hiking and Biking Trails • Lawn Bowling • Morley Field Sports Complex • Municipal Gymnasium • San Diego Mineral and Gem Society • Super Sonic Samba School • Wheel Fun Rentals • Morley Field Disk Golf • Dog Parks • Picnic areas and Playgrounds

III. Economic Impact from Tourism

Balboa Park has a strong economic impact on to the City of San Diego, in addition to providing the cultural and recreational benefits that one would expect from such a historic and large public park. Economic impact is often misconstrued as revenue or general spending that takes place due to an entity or event. For the purposes of this study, economic impact is defined as the dollars generated by nonresidents who come to San Diego in large part to visit Balboa Park which, in turn, generate further spending in the local economy. Usually, local residents are not included in identifying economic impact, since *economic impact is generally viewed as new dollars added to an economy*.

Economic impact has two categories:

- (a) Direct economic impact from nonlocal attendees, such as spending on lodging, shopping and entertainment, and food and beverage
- (b) Indirect impact, which includes additional business generation in the local area resulting from the park

Direct impact is calculated by assessing nonlocal spending through a survey process, and indirect impact is identified through a multiplier. The Regional Input-Output Modeling System (RIMS II) multiplier for Southern California Parks and Museums is a tool used to identify downstream economic activity.¹ For every dollar spent in the economy, a domino effect takes place where other spending results. For example, businesses who participate need to purchase replacement products and grow their businesses. As a result, their employees will earn more and, in turn, spend more. Total economic impact is the combination of direct and indirect impact.

To calculate economic impact, an intercept survey of 2,238 Balboa Park visitors was conducted from September 2016 to May 2017 at the park. Surveyors followed a standardized process for engaging park users, asking a variety of questions regarding the user's activities and characteristics. Participation was voluntary and responses were anonymous. The survey included the following sections:

- User residence
- Activities in the park
- Length of stay (if nonlocal)
- Hotel information (if nonlocal)
- Spending on food and beverages
- Spending on entertainment
- Spending on shopping
- Spending on lodging
- Spending on transportation
- Demographics

¹ <https://www.bea.gov/regional/rims/rimsii/>

The initial goal of the 20-item intercept survey was to identify if the user was a local resident or nonlocal. In the case of nonlocals, spending and stay questions were asked regarding a “normal” day visiting San Diego. Direct impact was calculated using the sample as a representation of the population of total users. This suggests that annual attendance at Balboa Park is a critical calculation.

Balboa Park Estimated Attendance

The estimated total of annual park users is 4,681,922 individuals, resulting in a total of 28,405,222 visits. To calculate these estimates, the following three sets of data were analyzed:

- San Diego Tourism Authority visitor profile and intercept survey data
- Visitation to ticketed venues in the park and intercept survey data
- Visitation to the Balboa Park Visitors Center and intercept survey data

1. San Diego Tourism Authority Visitor Profile

The San Diego Tourism Authority conducts its own set of intercept surveys to assess travel patterns to San Diego.² The last profile, conducted in 2015, identified approximately 1,800,000 overnight visitors and 246,000 daily nonlocal users who intended to visit Balboa Park. Data from the intercept survey process found that nonlocal visitation represented 43.7% of total park usage. Consequently, the remaining 56.3% of local usage equals 2,635,922 for a total of 4,681,922 annual users. Note that this estimates the total number of unique users rather than visits. Nonlocals used Balboa Park a median of one time per trip, whereas local residents used the park a median of 10 times per year. The resulting 28,405,222 visits is shown in Table 2.

Table 2: Estimated Total Annual Visitors and Visitation

	Visitors	Median Visits	Total Visits
Nonlocal Visitation	2,046,000	1	2,046,000
Local Visitation	2,635,922	10	26,359,222
Total	4,681,922	--	28,405,222

2. Visitation to Ticketed Venues

A second attendance analysis was conducted to confirm the analysis of the San Diego Tourism Authority data. Entry to all ticketed venues is tracked by the respective entity in the park. These data are compiled monthly, and an annual total is created. The total attendance at ticketed venues in 2016 was 3,272,471.³ It is important to note that the same user may be counted more than once in this total. To identify a total number of users, intercept survey data was used to adjust the total. On average, park users go to ticketed events 1.78 times per visit, resulting in 1,838,467 unique users per year. According to the intercept survey, 39.9% of users visited

² CIC Research. (2015). *2015 San Diego County Visitor Profile Study*.

³ Internal Balboa Park Conservancy document

ticketed venues. Consequently, nonticketed attendance equals 60.1% or 2,769,220 visitors for a combined attendance of 4,607,687, which supports the San Diego Tourism Authority total.

3. Balboa Park Visitors Center

The final attendance total was estimated from the number of users of the Balboa Park Visitors Center. As part of the intercept survey process, respondents were asked about their intention to visit the Visitors Center, which tracks attendance through door sensors. A total of 498,896 people entered the Visitors Center during the twelve-month data collection period.⁴ 30.5% of respondents said they would visit the center, suggesting a total of 1,635,724 visitors per year. There are two limitations to note regarding the Visitors Center data:

- 1) There are instances when two people enter at the same time and only one is recorded.
- 2) Some larger groups may be under counted, with only a subset visiting the center. Therefore, we factored in average group size to counter these limitations. Based on the intercept survey, average group size is 2.62, which brings estimated attendance to 4,285,598, which is very close to the first two estimates.

To compare Balboa Park's usage to another well-known, large park, we looked at Central Park in New York City. In 2016, Central Park saw 9 million users, with a total of 42 million uses. Central Park, with 843 acres (1.3 square miles), is smaller than Balboa Park, with 1,200 acres (1.8 square miles). Of course, Balboa Park has a large zoo, parking lots, and a golf course that Central Park does not.



⁴ Internal Balboa Park Conservancy document

Economic Outcomes

The annual tourism economic impact in San Diego is estimated as \$356,403,908, with \$192,110,774 of direct impact and \$164,293,134 of indirect impact. Table 3 provides a breakdown of the direct economic impact by spending category. These impacts only include non-locals (2,046,000) who stated that Balboa park was either very influential or the main reason or for their visit to San Diego (19.4% of non-local respondents). For context, other economic impact studies were reviewed to identify total impact. A study of the San Jose, California, recreation system by the Trust for Public Land, for example, found that 7.7% of all visitors came for the purpose of visiting parks.⁵ This resulted in an estimated \$120 million in economic impact. Locally, a sporting event like the Holiday Bowl results in 50,000 attendees, generating approximately \$20–\$30 million in economic impact.⁶

Table 3: Direct Economic Impact

Spending Category	Spending* (\$ Million)	Spending* (Percent)
Lodging	63.8	33%
Food & Beverage	59.9	31%
Shopping	18	9%
Entertainment	26.4	14
Transportation	24	13
Total	192.1	100%

* Numbers are rounded.

In addition to direct visitor spending, taxes are collected from the non-local users who identified Balboa Park as a significant factor in their travel decision. With a total of 311,650 hotel room nights generated, the resulting hotel tax (10.5%) is estimated at \$6,701,037. The local portion of sales tax generated from shopping, entertainment and transportation is estimated at \$3,207,284.

⁵ The Trust for Public Land. (2016). *The Economic Benefits of the Park & Recreation System in San Jose, California*.

⁶ Center for Hospitality Research, San Diego State University. (2016). *2016 Holiday and Poinsettia Bowl economic impact analysis*.

Lodging

Balboa Park draws both day users and overnight visitors. Table 4 illustrates the residency of visitors to Balboa Park.

Table 4: Residency of Visitor

Location	Percent
San Diego County	56%
Elsewhere in California	15%
Arizona or Nevada	3%
Elsewhere in the US	17%
Elsewhere International	9%

Based on our intercept surveys,

- (a) 15% of respondents came from outside San Diego, but inside California
- (b) 29% of travelers came from outside California—United States or international
- (c) Smaller percentages of visitors came from Arizona and Nevada

The vast majority of these travelers (77.9%) stay in hotels or home/condo rentals when visiting San Diego. The average stay in San Diego is three nights, with an average daily room rate of \$165.27 and a mean of 2.4 people per room.

Spending on Other Categories

Figures 2–5 provide a more detailed analysis of spending in other categories aside from lodging.

Figure 2: Food and Beverage Expenses

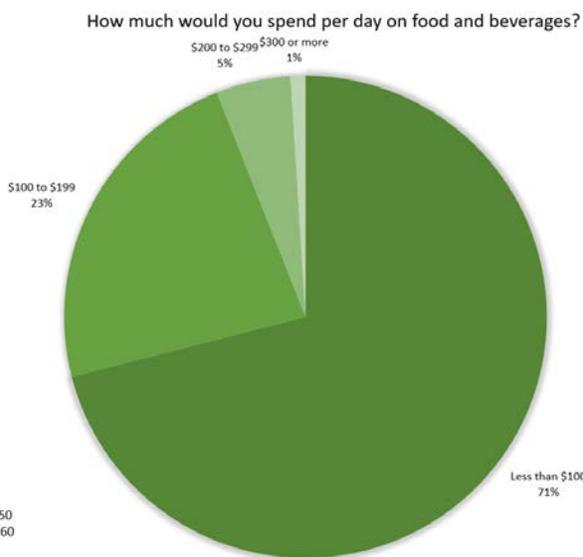


Figure 3: Entertainment and Attraction Expenses

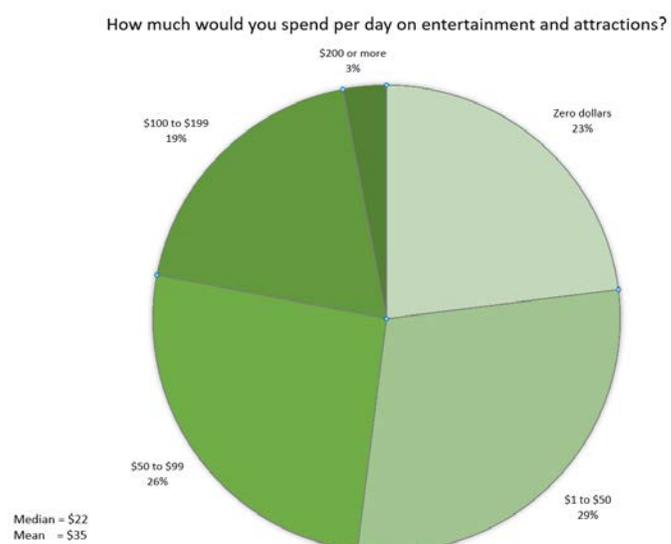


Figure 4: Shopping Expenses

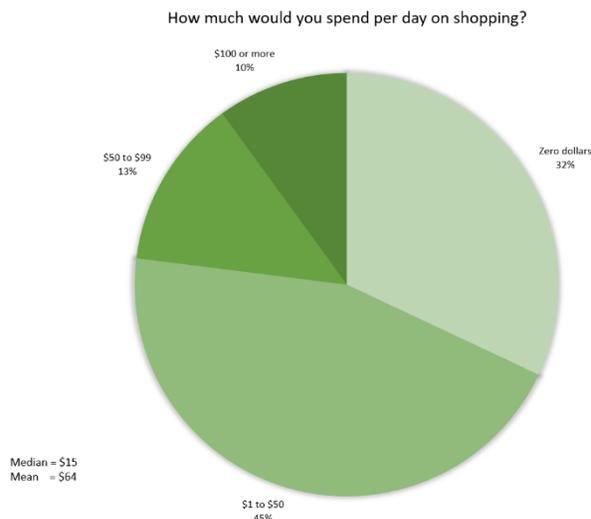
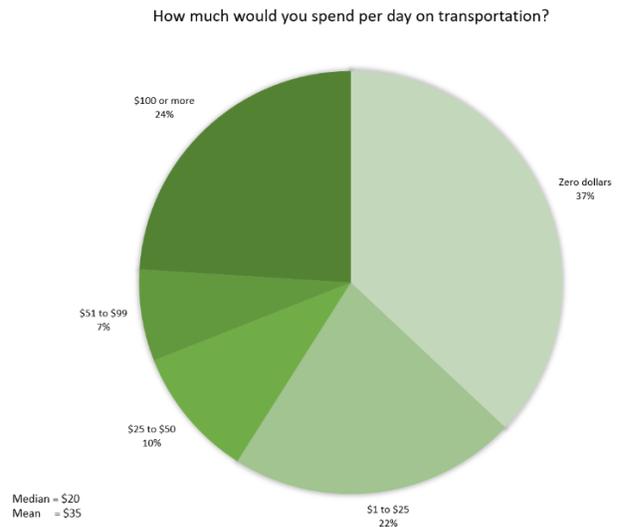


Figure 5: Transportation Expenses



Visitor Characteristics

In addition to economic outcomes, demographic characteristics of Balboa Park users were explored. The results in this section account for all users of the park, not just nonlocal visitors. Questions were largely multiple response with a range of descriptive choices.

The majority of users were female (58%) between 25 and 34 years old. The largest percentages of users indicated that they earned \$75,000–\$100,000 per year (22%), were married (52%), and had at least one child (64%). Most users of Balboa Park were educated, with 67% indicating they graduated college or had completed some post-college work.

The final survey item asked visitors how they would describe their race/ethnicity. As shown in Figure 9, 52% described themselves as Caucasian, with 48% coming from a range of diverse backgrounds.



Figure 6: Park User Age

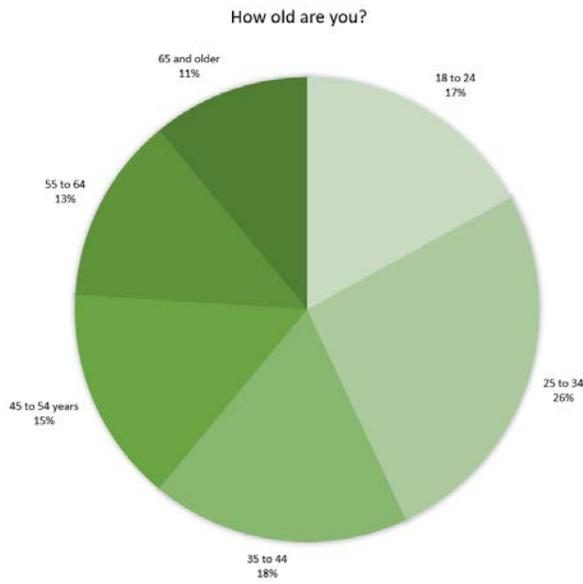


Figure 7: Park User Income

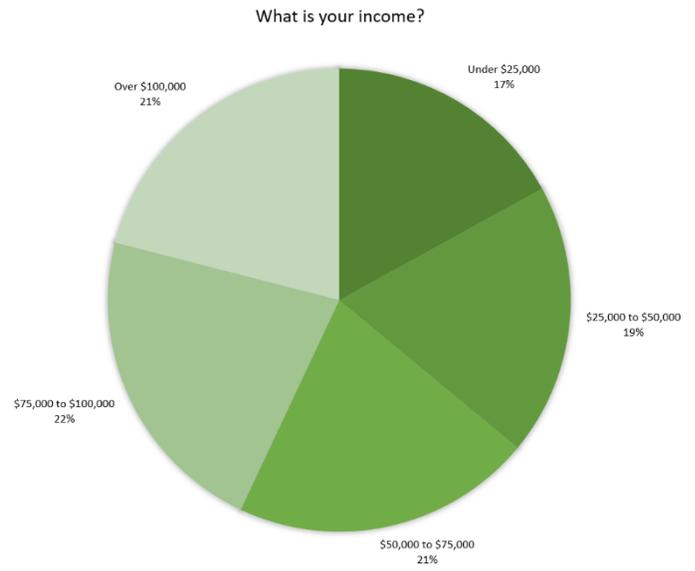


Figure 8: Park User Education

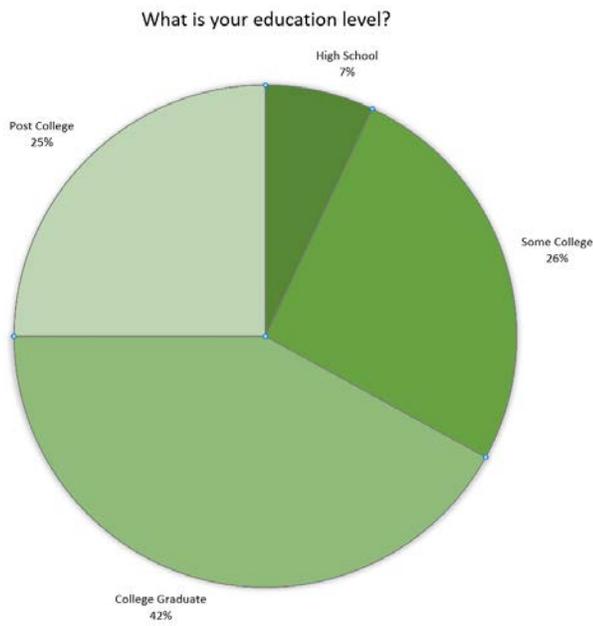
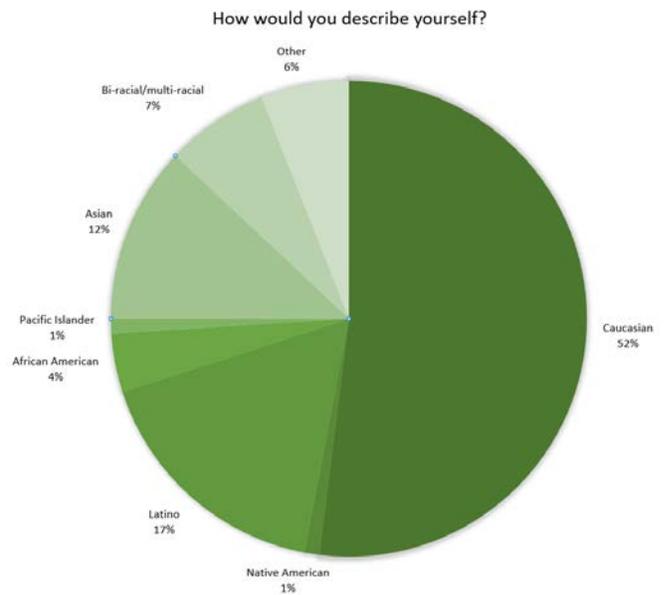


Figure 9: Park User Race/Ethnicity



IV. Employment and Volunteer Impacts

Balboa Park is home to a wide and very diverse group of organizations that operate with a mixture of full- and part-time employees, independent contractors, performers, artists, athletes, board members, and volunteers, from high school age to senior citizens. The passion and feeling of “ownership” for their respective organizations is incredible. The City of San Diego also provides direct and indirect support of the park operations and maintenance. Data sources for this analysis included tax returns (IRS 990), websites, annual reports, interviews, information submitted for this study by various organizations, and data provided by the San Diego Commission for Arts and Culture. In most cases, data was from 2016. Information for the San Diego Zoo was not included.

Park organizations were stratified into the following groupings:

Table 5: Types of Park Organizations

Type	Count
Museums	18
Performing Arts	9
Attractions	9
Gardens	18
Recreation	14
Other	0

Each of these groups was evaluated by size and scope for each type of organization. Norms were identified based on the reported data and sampled within each sub-stratum. This established a comprehensive data set for analysis. Individual organization results are not shown, and all are grouped to make estimates. It was challenging to establish averages and norms by stratum. The following are some examples of how “outliers” were managed in this process:

- The Japanese Friendship Garden greatly skews the mean figures for **Gardens**, as it is far larger than all others in employment. Estimated totals only were used because of the huge variations in the data.
- **Recreation** types vary widely and, because of the huge variations in the data, only totals were used. Further, the City of San Diego employs staff both directly and indirectly for Balboa Park operations and maintenance.
- **Other** includes nonprofits such as the Balboa Park Conservancy, Friends of Balboa Park, and independent businesses like the Prado Restaurant. Again, only totals were used to determine the results.

Total annual labor expense for park organizations was estimated at \$52,956,015. Museums and performing arts venues represent approximately 90% of this employment. The analysis divided these organizations into the following categories and reflected the following annual payrolls:

Table 6: Employment Summary

Entity	Total Labor
Museums (18)	\$29,234,466
Performing Arts (9)	\$17,798,949
Attractions (9)	\$242,600 ⁷
Gardens (18)	\$701,000
Recreation (14)	\$1,979,000
Other	\$3,000,000
Total	\$52,956,015

It was determined there are 1,113 “full-time equivalent” (FTE) employees in all Balboa Park organizations. More than half are full-time, with the balance part-time. Salaries vary significantly, the average (FTE) salary is \$47,579, but this includes many part-time roles. In addition, there are more than 13,500 independent contractors serving in a variety of roles, from entertainers to maintenance workers.

Table 7: Employment and Volunteer Data

Full-Time Employees	681
Part-Time Employees (in FTE)	432
Independent Contractors	13,671
Interns (FTE)	313
Full-Time Volunteers	862
Part-Time Volunteers	25,840
Board Hours Annually	81,502

The total number of volunteers in the park includes 862 full-time and a whopping 25,840 part-time individuals. We were unable to total the volunteer hours but found enough data on Balboa Park Boards of Directors to estimate total service of 81,502 hours annually for this volunteer category alone. With further research and collaboration between institutions and organizations, the volunteer hours could be tallied and be monetized.

⁷ The San Diego Zoo, Miniature Railway, and the Visitors Center are not included. The Visitors Center is under “Other.”

V. Direct Recreational Use Value

Public parks provide a wide array of benefits to local residents through direct recreational use. Balboa Park is used by local residents by providing access to free recreation including walking, jogging and biking trails, areas to explore wildlife and nature, playgrounds, team sports, picnic areas and areas for general exercise. While Balboa Park also provides activities for a fee including golf, theaters, and museums; most recreational opportunities are free. Using a standard economic methodology used in many previous studies, we calculated the value of these free recreational activities by estimating consumers' willingness to pay for a similar recreational experience at another fee-for-service venue

Users of Balboa Park for the year 2016–2017 totaled **4,681,922** individuals, of which 43.7% were nonlocals (2,046,000) and 56.3% were local San Diego County residents (2,635,922). For the purpose of the direct recreational use analysis, only local residents who participated in recreational activities were included.

Results from the analysis revealed that walking/hiking was the most popular recreational activity among residents (58%), while exploring nature and wildlife was second (29%). Other recreational activities important to residents included picnicking, running/jogging, general exercise, biking, using the gym/fitness center, team sports, swimming, and golfing, all summarized in the table below.

Table 9: Summary of Park Activities

Activity	Percentage
Walk/Hike	58%
Explore Nature/Wildlife	29%
Picnic, Sit on Benches	25%
Run or Jog	6%
General Exercise	5%
Bike	4%
Use gym/fitness center	1%
Team Sport	1%
Swim	0.41%
Golf	0.16%

To determine the economic benefits of recreational activity at Balboa Park, we performed a direct recreational use analysis based on the types of activities residents took part in at the park. We assigned recreational use values to each activity based on Recreational Use Values Database (RUVD) published by Oregon State University in 2016.⁸ The RUVD is based on 421 economic valuation studies that estimated the recreational use value of activities in the United States and Canada from 1958 to 2015. *Recreational use value estimates measure net willingness-to-pay for access to specific recreational areas and for certain recreational activities.* Estimates are based on per person/per activity/per day units and are separated by activity and region of the United States. For this study, we used the numbers from the Western U.S. estimates. Values from the top 10 activities reported by San Diego residents were used in the analysis; nonresident park use was excluded from this analysis. Direct recreational use values for Balboa Park totaled over \$111.5 million for 2016.⁹ Results from this analysis can be found below.

Table 10: Recreational Use Value Summary

Activity	Percentage	Participation	Value per	Total Value
Walk/Hike	58%	15,288,348	3.15	\$48,158,294.94
Explore Nature/Wildlife	29%	7,644,174	3.15	\$24,079,147.47
Picnic, Sit on Benches	25%	6,589,805	3.15	\$20,757,885.75
Run or Jog	6%	1,581,553	3.15	\$4,981,892.58
General Exercise	5%	1,317,961	3.15	\$4,151,577.15
Bike	4%	1,054,369	3.15	\$3,321,261.72
Use Gym/Fitness Center	1%	263,592	5.15	\$1,357,499.83
Team Sport	1%	263,592	14.9	\$3,927,523.78
Swim	0.41%	108,073	5.15	\$556,574.93
Golf	0.16%	42,175	5.15	\$217,199.97
				\$111,508,858.12

⁸ Recreational Use Values Database

<http://recvaluation.forestry.oregonstate.edu/sites/default/files/RUVD%20WEB%20SUMMARY%202016%20update%20110116.pdf>

⁹ Note that this analysis assumes people engage in similar activities during their multiple visits. The questions on the survey asked for respondents to describe their activity on an average visit.

VI. Real Estate Impacts

The positive impact on real estate values and tax increases from properties surrounding Balboa Park is tremendous and estimated to be \$92.5 million dollars. The estimated impact that Balboa Park has on real estate values around the park is \$91,752,938. Using an average tax rate on property values of .77% that goes to the city of San Diego, this increase in property values yields additional revenue to the city of \$709,354 annually.

To determine Balboa Park's impact on the real estate market, we estimated how the value of a property changes as it moves further away from Balboa Park. Data was collected on the value of houses sold between June 2016 and December 2106 on realtor.com. The average price of a house sold during this time was \$727,837, with an average of 2.64 bedrooms, 1.78 bathrooms, and a total of 1,286 square feet. A multiple regression analysis was used to isolate the impact of how the number of blocks from the park affects the value of a house holding number of bedrooms, bathrooms, and square footage constant. On average, for every additional block a house is located further from Balboa Park, the price of the house drops by \$5,344 or .76%, holding the other factors constant. While not directly relevant to this analysis, we estimate that an additional bedroom increases a house's value by \$30,286, an additional bathroom \$2,180, and for each additional square foot \$275.

In order to find the total impact on real estate values around the park, we needed to obtain the value of all houses and apartments within five blocks of the park in all four directions of the park, excluding commercial real estate, using Zillow.com. Outside of a five-block radius, little or no value increase was identified for residential properties. However, properties five blocks away are estimated to have a .76% increase in property value and increases moving closer to the park. Residential properties four blocks away have an estimated 1.52% increase in property value, until residences across the street from Balboa Park have an estimated increase in property values of 4.56%.¹⁰ Residential values due to proximity to the park was then calculated by multiplying the total estimated residential property value by the percent of the value yielding an overall estimate of \$91,752,938 or almost \$92 million. It is worth noting that although the residential properties near the park have a higher percentage benefit of being near the park, their overall contribution to the residential benefit is lower than most of the other blocks because there are fewer residential properties immediately adjacent to the park.

¹⁰ The Trust for Public Land (2016, p.9) estimates the value of real estate around San Jose, CA parks. This analysis limited the analysis to the market value of all dwellings within 500 feet of the parks and uses a value of 5% benefit of in increased real estate value of being near a park. An additional market value of \$514 million with an additional property tax value of \$7.2 million for all parks located within San Jose, CA was identified. The marginal benefits of parks range from 5% to 20% and the real estate premium exists for properties up to 2,000 feet away from the park.

Table 11: Additional Real Estate Value Due to Proximity to Balboa Park

Blocks from	Estimated Residential	Percent of Value Due	Residential Value Due to
0	\$212,672,000	4.56%	\$9,697,843
1	\$514,559,000	3.80%	\$19,553,242
2	\$788,240,000	3.04%	\$23,962,496
3	\$886,800,000	2.28%	\$20,219,040
4	\$792,709,000	1.52%	\$12,049,177
5	\$825,150,000	0.76%	\$6,271,140
Total	\$4,020,130,000		\$91,752,938

The higher residential property values generate additional property taxes for the City of San Diego. The estimated average property tax rate for this area is 0.773%. With the total increase in property values for residences near Balboa Park calculated to be \$91,752,938, this yields \$709,354 in additional property taxes to the City of San Diego. This figure is likely a gross underestimate of all taxes that Balboa Park generates. Sales taxes on goods sold within Balboa Park were not included. In addition, business property taxes in the Balboa Park area, as well as sales tax on additional revenue they likely generate, are not included in the totals.



VII. Environmental Impacts

Another benefit of Balboa Park is the positive impact its large green spaces and trees have on the environment, including carbon storage and carbon sequestration, the removal of air pollution from the environment, and avoided rainwater runoff. The estimated annual environmental impact benefit of Balboa Park is \$390,695.

Environmental impacts of a vast and varied place such as Balboa Park can be difficult to quantify. The i-Tree Landscape tool, provided by the US Department of Forestry, is used to determine the environmental impact of a locality. This tool utilizes the 2011 National Land Cover Database, a map that contains information about land and tree cover as well as geographic location, climate region, surface permeability and index of locations within the United States to obtain environmental benefits. Unlike other sections of this report environmental estimates provided include the San Diego Zoo. The model estimates that the value of carbon storage at Balboa Park is \$340,248 per year while the value of carbon sequestration is estimated to be \$14,383 per year. Table 12 provides information regarding the \$29,198 of additional environmental benefit of the removal of air pollution, aside from carbon. Particle pollution removal has the highest benefit of \$12,359 a year while ozone pollution removal has the second highest benefit at \$11,484 a year.

Table 12: Summary of the Environmental Benefits of Balboa Park

Environmental Benefits of Balboa Park	
Value of Carbon Storage	\$340,248 per year or 2,379 t/year
Value of Carbon Sequestration	\$14,383 per year or 100.6 t/year
Carbon Monoxide (CO)	\$125 per year or 187.6 lbs./year
Nitrogen Dioxide (NO2)	\$282 per year or 755.3 lbs./year
Ozone Pollution (O3)	\$11,484 per year or 3,889.6 lbs./year
Particle Pollution (PM2.5)	\$12,359 per year or 80.9 lbs./year
Sulfur Dioxide (SO2)	\$18 per year or 151.5 lbs./year
Particle Pollution (PM10)	\$4,930 per year or 1,573 lbs./year
Avoided Storm-Water Runoff	\$6,866 or 0.8 MG/year

In addition to Balboa Park’s trees, vegetation and green spaces help rainwater soak into the ground instead of running into storm drains, as it would have if the park area were completely developed. The average yearly rainfall in Balboa Park is 8.5 inches, and the park as a whole is estimated to save \$6,866 in avoided storm-water runoff. This estimate is low relative to other cities because San Diego has very little rainfall in a typical year.

There are a few caveats to note in these estimates of the environmental benefits. The i-Tree Landscape tool only provides a rough estimate of the environmental benefits of trees in the area; a more precise estimate would be possible if the type, diameter, and height of each tree in the park were inventoried. The Conservancy has such an inventory underway and at present has inventoried over 6000 trees in the park. Once this inventory is completed a more detailed analysis will be possible.

Other environmental benefits, such as the value of solar panels in Balboa Park, are not included in this estimate. Balboa Park also plays an important role in providing a place for tourists and San Diego residents alike to exercise and revel in nature’s beauty. Open green spaces, tennis courts, playgrounds, hiking and biking trails, a golf course, and lush gardens provide health benefits, covered in the next section, in addition to the environmental benefits discussed above.



VIII. Health Impacts

Public parks can meet the needs of many Americans to become more active, or to maintain an active lifestyle. Public parks are frequently cited as places that can easily and conveniently aid in improving the physical and mental health of communities. Numerous studies have documented the economic burden related to physical inactivity. Case in point, the National League of Cities and the U.S. Department of Health and Human Services reported that the estimated annual health care costs of obesity related illnesses is \$190.2 billion, or 21% of all annual medical spending and these costs continue to increase dramatically. Common medical problems due to inconsistent physical activity include cardiovascular disease, ischemic stroke, type 2 diabetes, colon and breast cancers and depression.¹¹ Regular physical activity, on the other hand, has been associated with important health benefits that can reduce the risk for these problems, including reducing the risk of premature death. US Department of Health and Human Services Physical activity guidelines for Americans recommend adults to do at least “150 minutes of moderate intensity activity or 75 minutes of vigorous-intensity activity, or a combination of both, along with 2 days of strength training per week”.

In order to determine the health and wellness benefits of Balboa Park, 1205 residents of San Diego County were surveyed on their recreational use of the park. More specifically, data collected from residents included the types of activities they participated in, how often they visited the park for these activities, in what intervals they participated in the activities and at what level of rigor (moderate-intense). Results were then extrapolated out to the total number of residents who actively used Balboa Park for recreational purposes.



Utilizing intercept survey data, as well as data collected over a 12-month period of daily visits to Balboa Park, we estimated Balboa Park’s health benefits. Using the CDC’s guidelines, the analysis focused on adult San Diego residents who used the park as their primary resource for exercise. This analysis revealed that 40,013 adult residents in San Diego used Balboa Park to

¹¹ US Department of Health and Human Services. (2008). Physical activity guidelines for Americans. <https://health.gov/paguidelines/pdf/paguide.pdf>

maintain or improve their health to a degree that met or exceeded the CDC guidelines for physical activity.

For this analysis, we used the value of \$1,100, which is the mean annual health care expenditure difference per capita for inactive adults compared to active adults.¹² This value was based on a comprehensive review of various health care economic studies, including a recent 2015 study that combined physical activity data from the National Health Interview Survey and health care expenditure data from the Medical Expenditure Panel Survey. The value was adjusted conservatively based on previous health care economic studies of other parks in California to account for any over-reporting of recreational activity participation. The health care savings from use of Balboa Park for the residents of San Diego County was \$44 million in 2016 as shown in Table 13.

Table 13: Estimated Health Benefits of Physical Activity in Balboa Park for San Diego County Residents

Category	Value
Adults using Balboa Park as a direct resource for their physical activity to meet CDC guidelines	40,013
Health care cost savings per active adult	\$1,100
Total annual health care cost benefits	\$44,014,300

¹² Carlson, S. A., Fulton, J. E., Pratt, M., Yang, Z., & Adams, E. K. (2015). Inadequate physical activity and health care expenditures in the United States. *Progress in cardiovascular diseases*, 57(4), 315–323.

IX. Benefits to Youth

One of a community's most valuable resources is its children. The goal of creating a society where children can develop socially, emotionally, and physically is both noble and necessary. Recent statistics demonstrate how difficult it is to accomplish this consistently. While juvenile crime has decreased steadily over the past 25 years¹³—the number of killings committed by youths under 18 are at their lowest point in 30 years¹⁴—in 2014, roughly 3,000 out of every 100,000 children between the ages of 10 and 17 were arrested nationally.

Because the majority of school-age children are in either single-parent or two-parent homes where both parents work, many parents are not home with their children after school.¹⁵ The result is an increase in unsupervised time for youths. According to the National Incident Based Reporting System (NIBRS), the majority of juvenile crime tends to happen between the hours of 2:00 p.m. and 5:00 p.m. at home.¹⁶ Offenders range in age from 11 to 17, with the vast majority of crimes committed by high school-aged children (14–17).

In San Diego County, the trend in juvenile crime and detention seems to follow the national pattern. For example, according to kidsdata.org, juvenile felony arrests have dropped from almost 20 per 1,000 in 1998 to 6.6 per 1,000 in 2014.¹⁷ Progress has been made, due in large part to programs that run during that “danger zone” in the late afternoons, particularly during the week. The literature is clear that afterschool, sports, and other recreational programs help to reduce negative juvenile outcomes.

For example, in a 20-year review of adolescent activity, afterschool programs were highly correlated to “higher self-esteem, academic achievement and lower delinquency.”¹⁸ More recently, a meta-analysis of 73 programs found that self-confidence, self-esteem, attitudes toward school, social behavior, and academic performance all improved as a result of youth participation.¹⁹ In terms of physical activities, researchers found that social and emotional well-being result when youth engage in sports or outdoor activities.²⁰

¹³ http://www.ojjdp.gov/ojstatbb/crime/JAR_Display.asp?ID=qa05200

¹⁴ National Center for Juvenile Justice. (2014). *Juvenile offenders and victims: 2014 national report*.

¹⁵ National Recreation and Park Association. (2015). *Structure recreation programming can help reduce juvenile crime*.

¹⁶ National Recreation and Park Association. (2014). *The benefits of recreational programming on juvenile crime reduction: A review of literature and data*.

¹⁷ <http://www.kidsdata.org/topic/165/juvenilearrest-rate/bar#fmt=2332&loc=368&tf=79&sort=loc>

¹⁸ Holland, A., & Thomas, A. (1987). Participation in extra-curricular activities in secondary school: What is known, what needs to be known? *Review of Educational Research*, 57, 437–466.

¹⁹ Durlak, J., & Weissberg, R. (2007). The impact of after-school programs that promote personal and social skills. *Collaborative for Academic, Social, and Emotional Learning (CASEL)*.

²⁰ Lubans, D., Plotnikoff, R., & Lubans, N. (2013). A systematic review of the impact of physical activity programmes on social and emotional well-being in at-risk youth. *Child and Adolescent Mental Health*, 17, 2–13.

To this end, Balboa Park provides both abundant recreation spaces for youth as well as a vast selection of child-through-teen educational programs.

In terms of child play areas, Balboa Park has a variety of options, including community park areas and playgrounds for kids covering **66,240** square feet of park space. These areas are well maintained and provide safe places for recreation. Table 14 shows a breakdown of these areas and their square footage. These play areas mainly serve young children.

Table 14: Balboa Park Play Areas

Area	Square Footage
West Mesa Playground	30,600
Central Mesa – Pepper Grove	16,400
East Mesa – Morley Field Playground	4,100
East Mesa – Upas St. and Pershing	2,040
East Mesa – Bird Park	1,900
Golden Hill Community Park	2,900
Nature Discovery Area Behind Morley Field	8,300
Total	66,240

In addition to play areas, Balboa Park is rich in educational programming for children and teens. Interviews and surveys with members of the Balboa Park Education Council (BPEC) identified many of the programs, their components, and the number of kids served annually. These programs range from weekend workshops and tours to week-long summer camps at the various park cultural institutions. More than 100 programs in Balboa Park offer more than 250 options when the choices within each program are taken into account. Up to **396,000** children and teens go through these programs annually.²¹ Table 15 provides an overview of many of these programs.



²¹ No data were available on children who engage in multiple programs. Future studies may want to survey parents to identify this variable.

Table 15: Children’s Educational Programs at Balboa Park

Cultural Institution	Sample Programs	Annual Attendance at Youth Programs	Sample Outcomes
San Diego Air & Space Museum	<ul style="list-style-type: none"> • Workshops • Science festivals and afterschool programs • Tours • Outreach 	25,695	<ul style="list-style-type: none"> • Programs aligned with <ul style="list-style-type: none"> -Next Generation Science Standards -Common Core State Standards -California Visual Arts Standards
San Diego Museum of Man	<ul style="list-style-type: none"> • Self-guided tours • Guided tours • Guided workshops • Summer camps • Outreach • Public programs • Regularly scheduled visitor engagement 	14,599	<ul style="list-style-type: none"> • Connects people to history, science, and culture • Challenges assumptions • Shines light on new understandings • Inspires thinking, creating, and taking action in the world
Museum of Photographic Arts	<ul style="list-style-type: none"> • Summer camps • Self-guided tours for school groups • Educator-led tours for school Groups • Workshops • Outreach programs 	2,610	<ul style="list-style-type: none"> • Incorporates photography into existing classroom curriculum • Camera lending library for educators • Free film screenings for Title 1 schools • CARE (Collaborative Arts Resources for Education)

Cultural Institution	Sample Programs	Annual Attendance at Youth Programs	Sample Outcomes
San Diego Model Railroad Museum	<ul style="list-style-type: none"> • Summer camps • Mac's Kids Corner • Field trips 		<ul style="list-style-type: none"> • Educates the next generation to <ul style="list-style-type: none"> - problem solve - spark curiosity - encourage learning
San Diego Civic Youth Ballet	<ul style="list-style-type: none"> • Summer camps • Ballet for the Classroom • Ballet for Me! • Ballet for the Community • Ballet for Schools & Scouts 	3,680	<ul style="list-style-type: none"> • Gives everyone the opportunity to dance • Offers assistance for children with unique physical needs
Fleet Science Center	<ul style="list-style-type: none"> • Camps • Scout programs • Saturday Science Club for Girls • Young Scientists • Sky Tonight • Sleepovers • School in the Park • Family Science Night • Science Station Investigation • Science To Go • Don't Try This at Home assembly • School workshops • SciTech 	45,105	<ul style="list-style-type: none"> • Build public enthusiasm for science for all ages • Increase the Fleet's community impact • Support diversity and gender equity in STEM • Enhance the gallery experience • Support in-school STEM learning • Build connections with STEM professionals
Japanese Friendship Garden	<ul style="list-style-type: none"> • Shichi Go San (art of kimono dressing for kids) • Summer camps • Field trips • Garden tours • High Tech High internships • Outreach 	1,300	

Cultural Institution	Sample Programs	Annual Attendance at Youth Programs	Sample Outcomes
San Diego Junior Theatre	<ul style="list-style-type: none"> • Camps and classes year round, ages 4–18 		
San Diego Natural History Museum	<ul style="list-style-type: none"> • Camps • School programs • Guided tours • Self-guided visits • Birthday parties • School in the Park • NATtalks • Binational education smart schools programs • Family days • On-the-floor programming by docents and educators • Migrant family program • ASD Mornings • Film series • Nature to You loan program • Storytime • Educator Night 	197,598	<ul style="list-style-type: none"> • School programs align with NGSS and support STEAM • Programs focus on "doing" science • Welcoming and engaging new audiences, especially those with autism • Museum access funds for Title 1 schools • Growth of all programs • Free access to museum to all teachers who are preparing for visit to theNAT • Using our exhibitions as classrooms
Spanish Village Art Center	<ul style="list-style-type: none"> • Morning Art 		
Timken Museum of Art	<ul style="list-style-type: none"> • Museum tours • Book a Speaker program • Artist residencies in K-12 classrooms • Family mural project • Family Secret Art Agent activity • Teacher workshops • Creative engagement (for students in juvenile hall) 		

Cultural Institution	Sample Programs	Annual Attendance at Youth Programs	Sample Outcomes
San Diego Museum of Art	<ul style="list-style-type: none"> • Outreach workshops • ArtCore, grades 4-6 • School in the Park / Museum Art • Primetime in partnership • Teen Art Café in museum • Youth summer camps ages 6-18 • Free admission for 17 and under • Free museum admission for schools • Free weekly Jazz Jam concerts • Musical ‘art stops’ in the galleries 	46,566	<ul style="list-style-type: none"> • Fosters creativity through the arts and nurtures critical thinking • Inspires a new generation of adults who appreciate the arts and learn about history in other parts of the world • Promotes STEAM and interactive learning • Museum access for Title 1 schools • Museum access for all youth 17 and under • 59% increase in attendance from youth when the financial
Mingei International Museum	<ul style="list-style-type: none"> • ART OF THE PEOPLE – Student Outreach Program • Free Docent-led tours for students and teachers • Mingei’s monthly Family Sunday • STUDENT CRAFT, the biennial juried high school student exhibition • Mingei’s in-gallery education room exhibitions • Monthly tours for students visiting from Tijuana. • Offer exhibition-based printed Family Guides • Free Tuesday hands-on art activities 	10,887	<ul style="list-style-type: none"> • Young audiences connect to art processes and cultures • Fosters creativity through the arts and nurtures critical thinking • Inspires a new generation of adults who appreciate the arts • Museum access for Title 1, needs-based, and Baja-based schools • Ability to develop important relationships between the Museum and the schools • Deepen visitor understanding and engagement with the Museums exhibitions

Cultural Institution	Sample Programs	Annual Attendance at Youth Programs	Sample Outcomes
San Diego Youth Symphony and Conservatory	<ul style="list-style-type: none"> • Debut Music Classes ages 8-15 • Inspiration Music Ensembles ages 8 to 17. • Showcase Music Ensembles ages 10 to 19 • Ovation Music Ensembles teen and young adults 9th grade and above • Community Opus Project grades 3-10 • Casa de Amistad Symphony • Rosa Parks Elementary School K-3 general music • International Youth Symphony: • Student Mentor Program • Open and free rehearsals for all visitors • Musical 'ArtStops' • Baby and Me Music classes • Preschool Music: weekly interactive music classes • School District Visual and Performing Arts Planning and Consulting • Out-of-State School District and Music Program 	Direct: 1,923 Indirect: 50,000	<ul style="list-style-type: none"> • Interacting with all musical communities to broaden cultural horizons • Embracing the diversity of current and prospective students. • Enriching the community through programs and collaborations that increase access to and appreciation of classical music. • Access and availability of music education to advance musical and personal achievement

X. Summary

Our investigation focused on Balboa Park’s many contributions to San Diego. Through beautiful landscapes, incredible museums, and a variety of park-wide events, Balboa Park provides significant recreational, cultural, and economic value to the community.

*“San Diego
simply isn’t
San Diego
without
Balboa Park.”*

- Mayor Kevin Faulconer

Key benefits of Balboa Park:

1) Economic Impact: Tourists spend a tremendous amount on food and beverage, entertainment, shopping, and lodging, generating over \$356.4 million annually in economic impact.

2) Employment: Balboa Park employs more than 1,113 employees and more than 13,500 contractors to maintain the park and create wonderful guest experiences, for a total investment of \$52.9 million annually.

3) Balboa Park provides incredible free recreational opportunities to residents, valued at \$111.5 million annually.

4) Residences near Balboa Park benefit from increased property values, resulting in \$92.5 million in increased real estate values and property tax revenue to the City of San Diego.

5) Balboa Park provides direct environmental benefits. Large green spaces and thousands of trees help with storm-water runoff and pollution, totaling \$390,695 in environmental benefits annually.

6) Balboa Park’s large open spaces provide inviting opportunities for exercise, which many San Diego residents take full advantage of. The result is a savings in direct health care costs of \$44 million annually.

7) Youth who visit Balboa Park benefit by enjoying thousands of square feet of play areas and participating in hundreds of educational programs provided by world-class museums and performing arts organizations.

In addition to these top-line economic impacts, the following statistics cement Balboa Park’s status as one of San Diego’s most important tourist attractions:

- An estimated **2,046,000** visitors from outside San Diego (**43.7%**) and **2,635,922** local residents (**56.3%**) visit Balboa Park annually—with locals using the park a median of 10 times per year, yielding up to **28.4 million** total visits.
- Of the **2,046,000** visitors from outside San Diego who used Balboa Park, over **38%** stated that visiting Balboa Park influenced their decision to come to San Diego, with **19%** stating that Balboa Park was the main reason or a very influential factor.
- Out-of-town visitors who came to San Diego to use Balboa Park generate **\$356,403,908** in economic impact with **311,650** hotel room nights booked, and **\$6,701,037** in Transient Occupancy Tax and **\$3,207,284** in local sales tax generated.

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XII. Image Credits

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Balboa Park Conservancy
1549 El Prado, Suite 1
San Diego, CA 92101
(619) 696-1920
www.balboaparkconservancy.org