

2024 Visitor Profile Report

Oct 14, 2025



PRESIDIO
TRUST

Visitor Data & Feedback Informs 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



Track progress on our goals over time



What We Survey, and How We Survey

- TRAFFIC & PEDESTRIAN COUNTERS
- LOCATION-BASED ANALYTICS
- QUANTITATIVE SURVEYS
- QUALITATIVE RESEARCH

VOLUME

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



COMPOSITION

By analyzing the **home geographies and demographics of park visitors**, we can identify where there are opportunities to grow our visitation



SENTIMENT

By asking potential visitors about their **awareness and perceptions** of the park, and by asking recent visitors about their **experiences and satisfaction** with the park



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Background

2024 Methodology Changes

- In 2024, the Presidio has adopted a new platform to measure and analyze domestic visitation, Placer Ai. As with any methodology shift, historical numbers have shifted slightly and have all been updated with Placer data for context.
- International data is provided via Tourism Economics as a separate, supplemental study calibrated with Placer Ai raw data.
- For the first time, we are able to report on both visits and individual unique visitors. We have labeled these measures accordingly.
- For the first time, we are able to report on visitor demographics specific to visits from the Bay Area only (instead of all visits).



Executive Summary



Are more people visiting us?

- 9.5 million total visits
- 3.9 million individual (domestic) visitors
- 2024 visitation surpassed 2023 levels



When are they visiting us?

- Visits were up across all quarters
- Q3 (July-Sept) showing largest visitation volume



Where are visitors coming from?

- Highest growth from International and Bay Area



Who are the people visiting us?

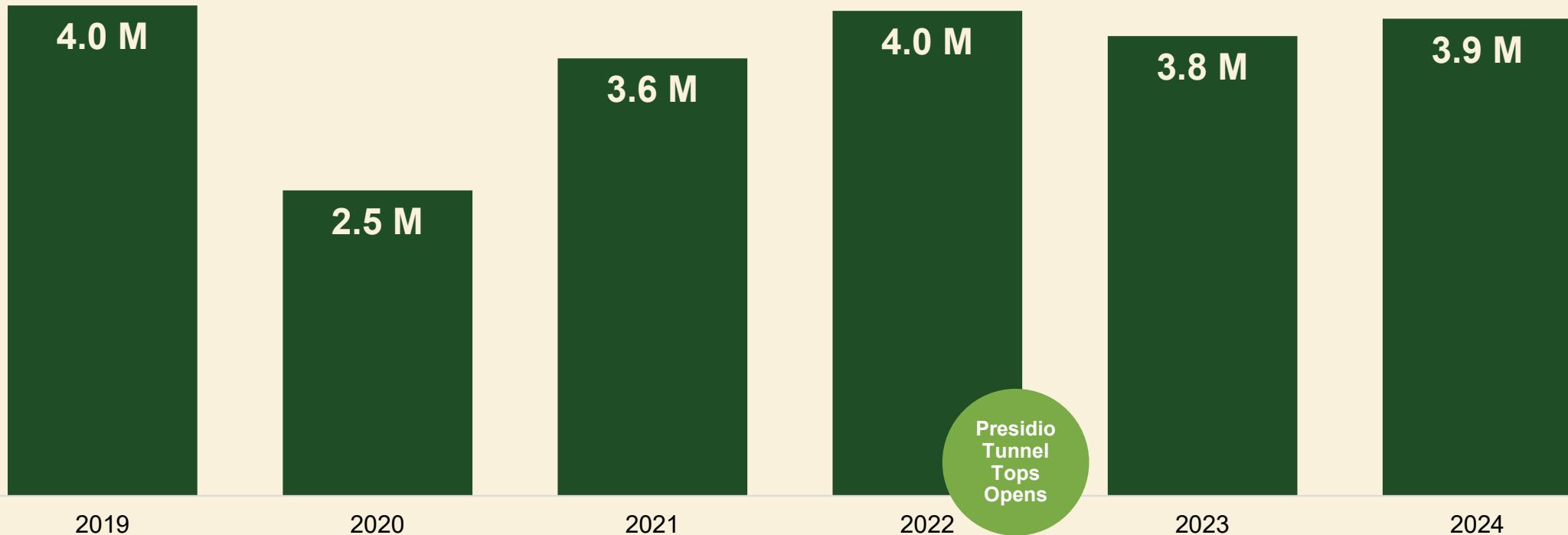
- Demographic composition largely the same from 2023 to 2024; visitation shifts reflect overall Bay Area demographic shifts

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Visitation Volume & Seasonal Trends

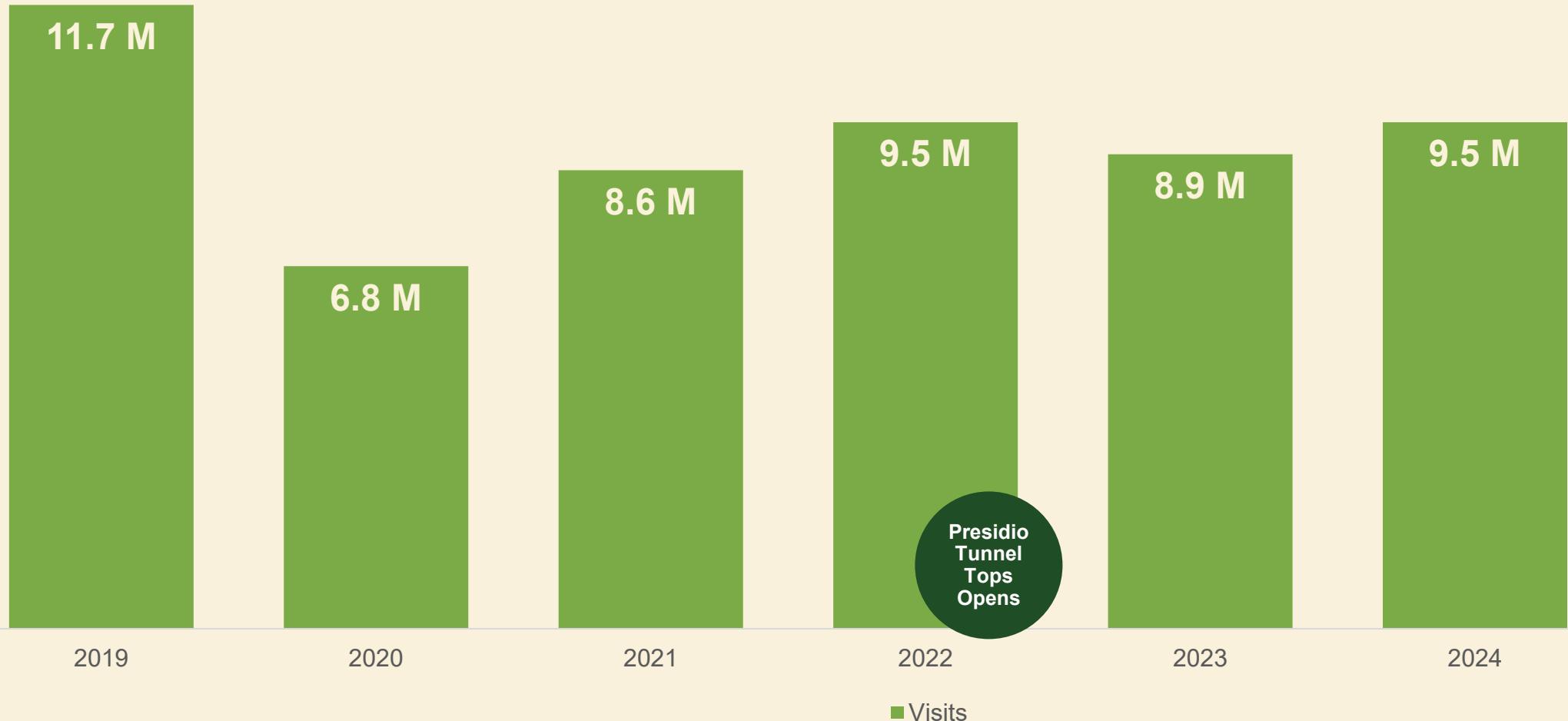


Number of Individual Visitors Shows Some Year-over-year Growth (Domestic)



Total Visits Are Up in 2024

Visitation has not returned to pre-Covid levels, with international travel slowest to rebound.



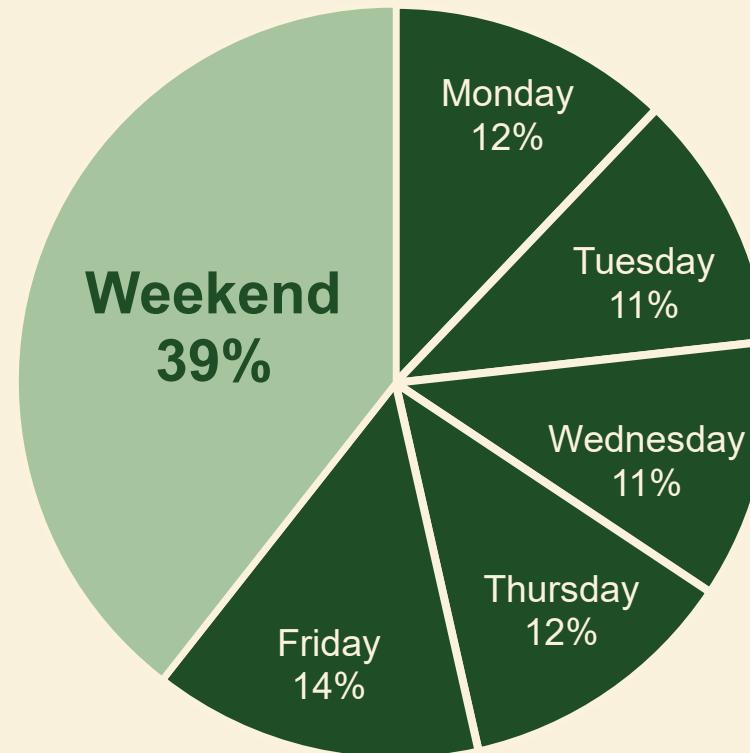
Visits Are Up Slightly Across All Quarters

VISITS BY QUARTER (Millions)



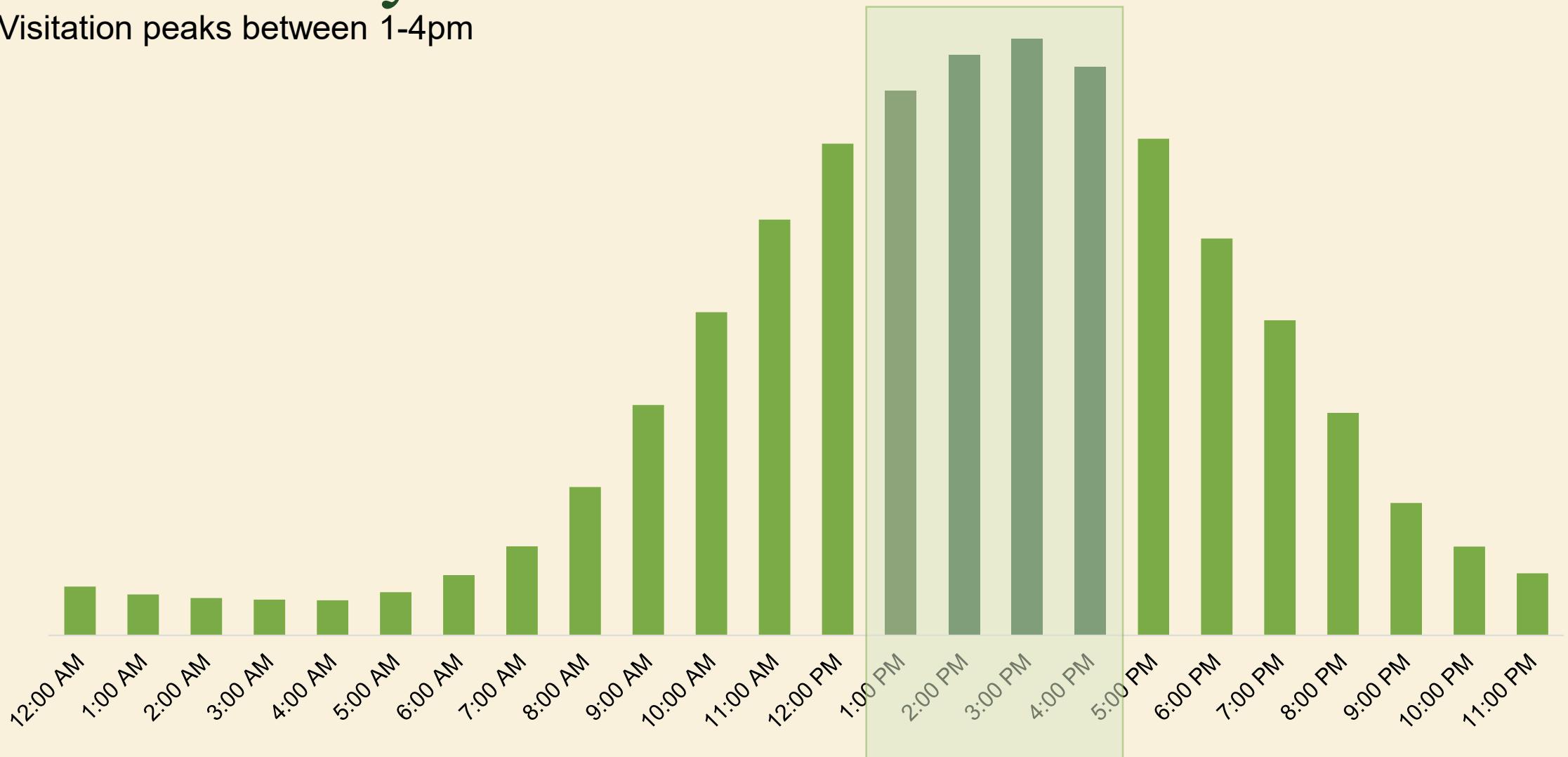
Visitation Distribution Remains Steady

Both data sets show the highest visitation is on the weekends, followed by Friday.



Visitation by Hour

Visitation peaks between 1-4pm



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Visitation by Geographic Origin



Visitation by Geographic Origin

Distribution of the park's 9.5 million total visits



3.6M
San Francisco



2.9M
Bay Area

Excluding San Francisco

+5.3% increase
from 2023 levels



1.2M
California

Excluding Bay Area

+9.3% increase
from 2023 levels



1.1M
US States

Excluding California

+3.2% increase
from 2023 levels

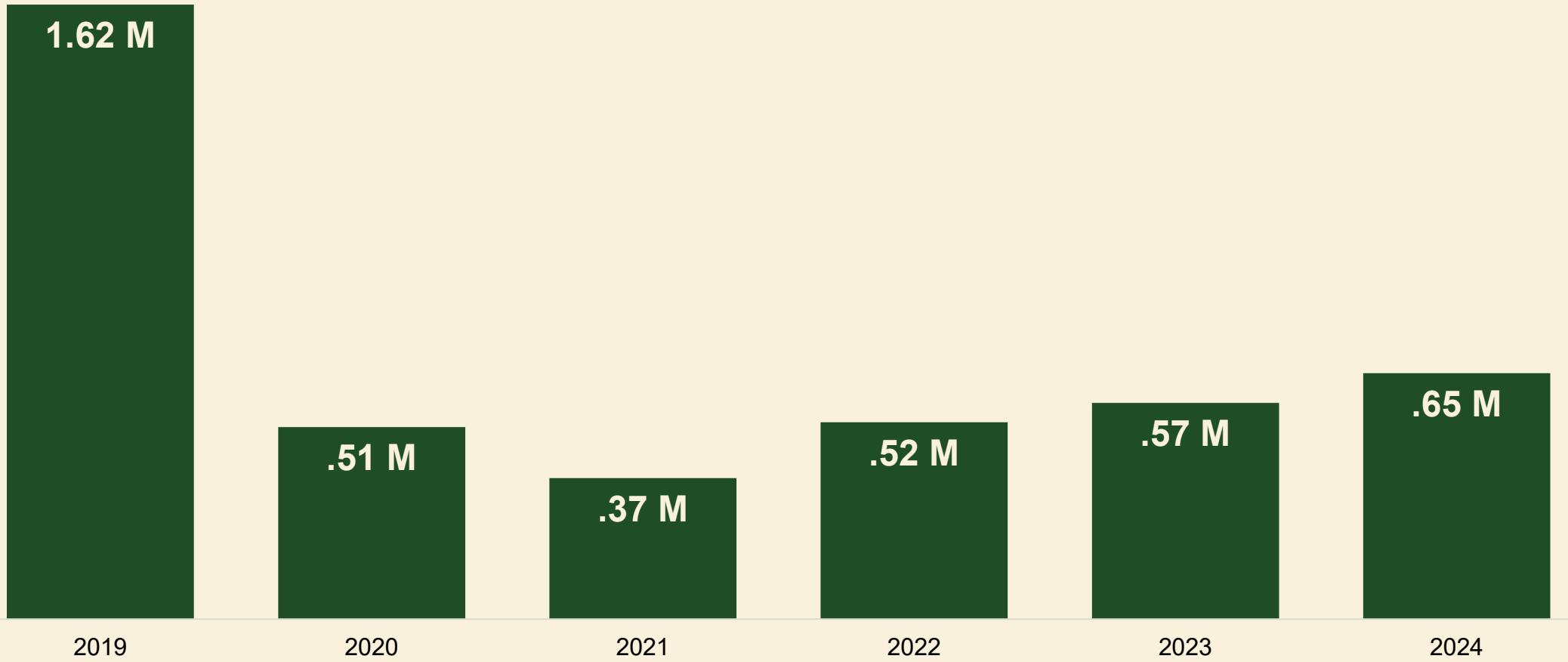


.65M
International

+14% increase
from 2023 levels

International Visitation is Growing, although Down 60% since Peak in 2019

Top volume coming from Mexico, Canada, South Korea, United Kingdom and China



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Bay Area Visitation Demographics



A Note About Demographic Data Collection:

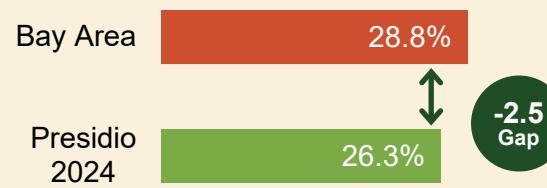
Consistent with available guidance from the current administration, we collect data on visitation geographies and can link those geographies to U.S. Census Block Group (CBG) demographic data. This allows us to compare the park's visitation to the Bay Area population.

As Low- & Middle-Income Segments Shrink, the Presidio's Share Holds Steady

Low Income: 2024



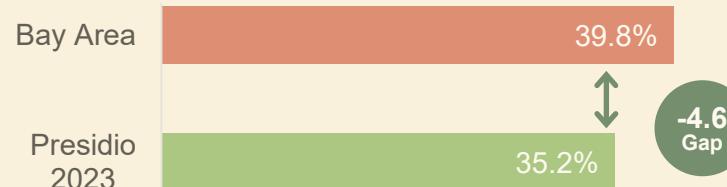
Middle Income: 2024



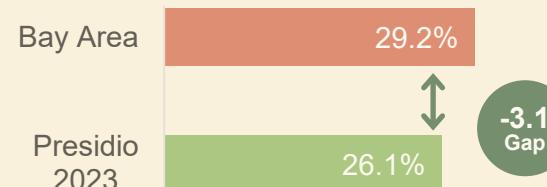
High Income: 2024



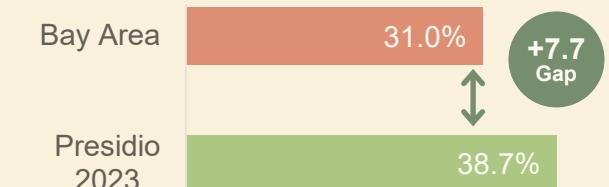
Low Income: 2023



Middle Income: 2023



High Income: 2023



Low Income is Household Income (HHI) of \$0-99.9K, Middle Income HHI \$100K-200K, High Income HHI \$200K+

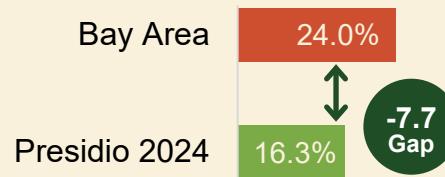
Source: Placer.ai Property Report with 15-minute visit minimum and 52-visit frequency cap. Report uses the US Census Bureau's 2022 American Community Survey Five-Year Estimates (ACS) for 2023 population data, and the 2023 ACS for the 2024 population data. Visitation demographics is reported based on total visits within a 55-mile radius compared to the US Census figures of that same radius.

Demographic Shifts in 2024 Visits Largely Reflected Bay Area Demographic Shifts

Asian: 2024



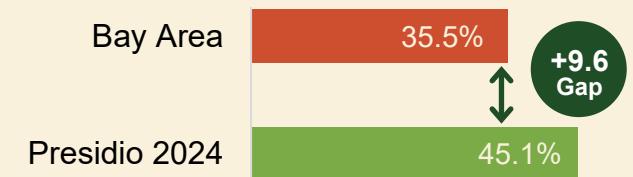
Hispanic: 2024



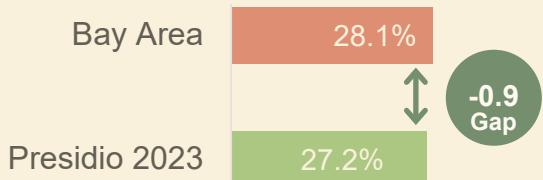
Black: 2024



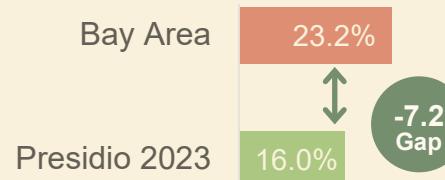
White: 2024



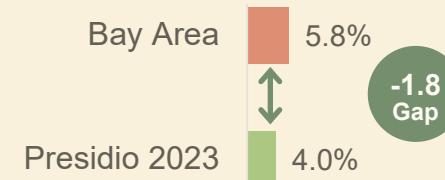
Asian: 2023



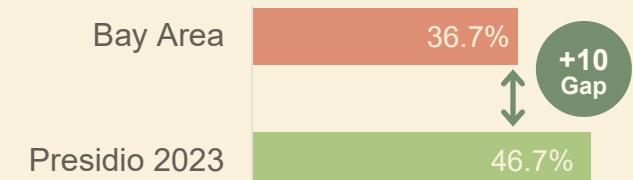
Hispanic: 2023



Black: 2023



White: 2023

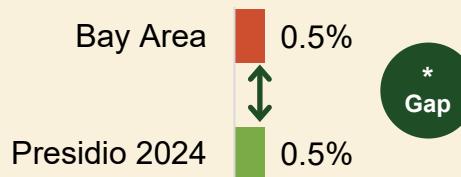


Slim Visitation Gaps Hold Fairly Steady

Native American: 2024*



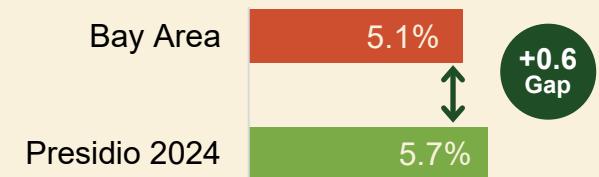
Native Hawaiian/PI: 2024*



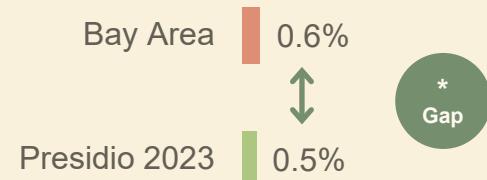
Some Other Race: 2024



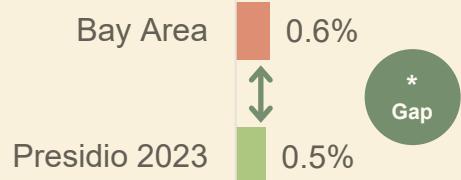
Two or More Races: 2024



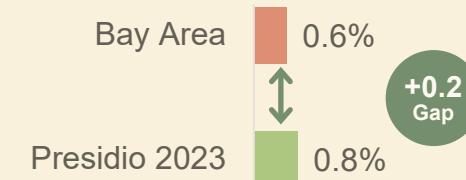
Native American: 2023*



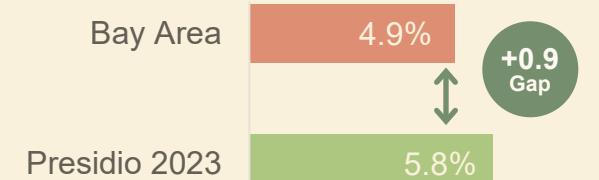
Native Hawaiian/PI: 2023*



Some Other Race: 2023



Two or More Races: 2023



*Note: Numbers <0.5% will be reported as 0.5%

Source: Placer.ai Property Report with 15-minute visit minimum and 52-visit frequency cap. Report uses the US Census Bureau's 2022 American Community Survey Five-Year Estimates (ACS) for 2023 population data, and the 2023 ACS for the 2024 population data. Visitation demographics is reported based on total visits within a 55-mile radius compared to the US Census figures of that same radius.

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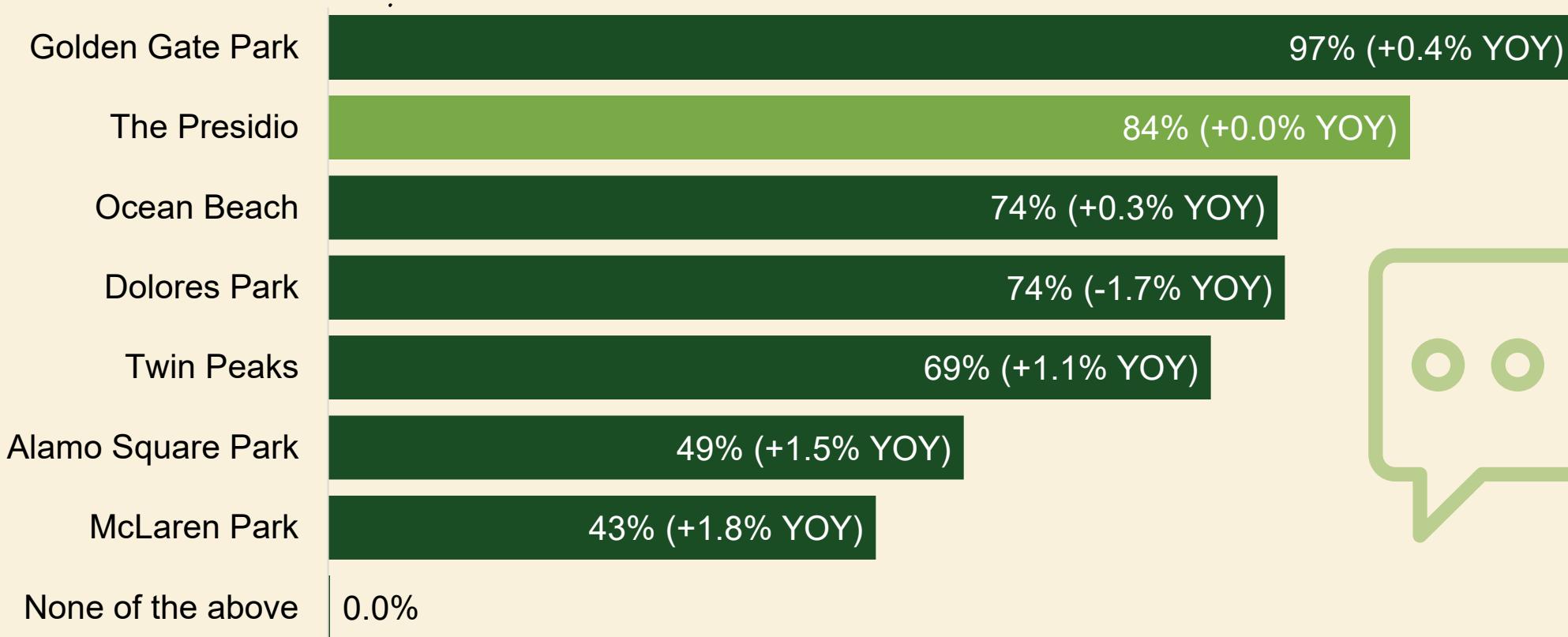
Visitor Attitudes, Perceptions & Sentiments



Overall Aided Awareness of the Presidio Remains High, Flat Year-Over-Year

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

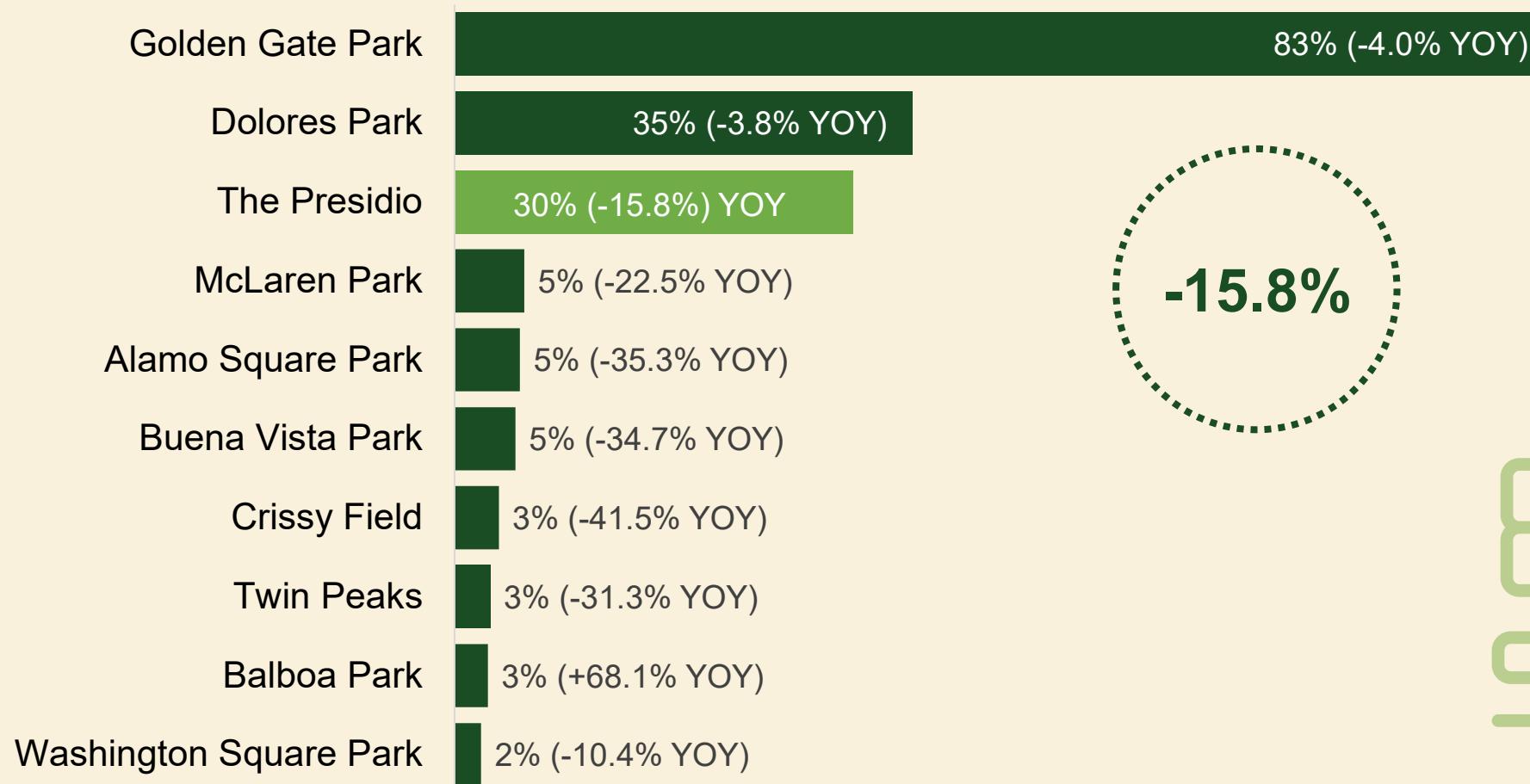
Base: All respondents, 1,200 responses.



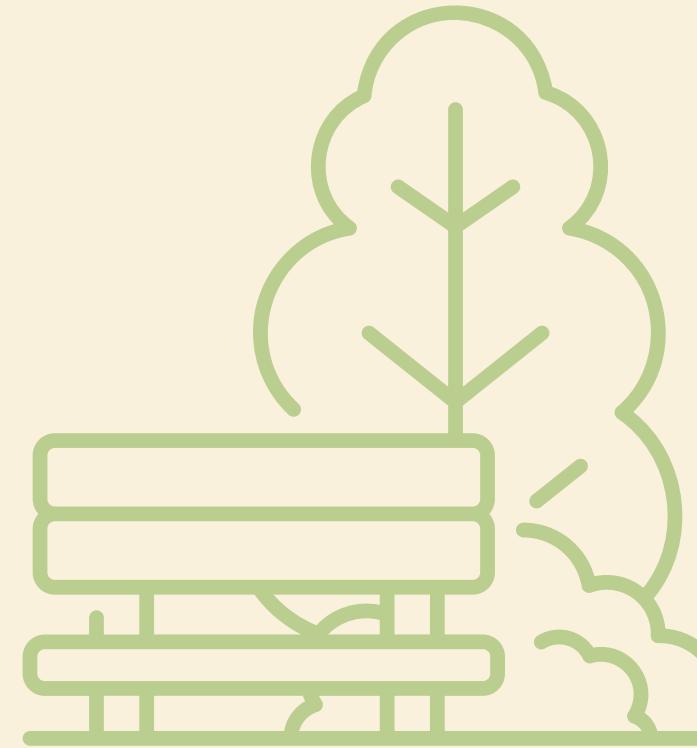
MENTIONS OF THE PRESIDIO AS A Top-of-Mind San Francisco Park Declined, Along with Other Parks in the City

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

Base: 1,184 responses

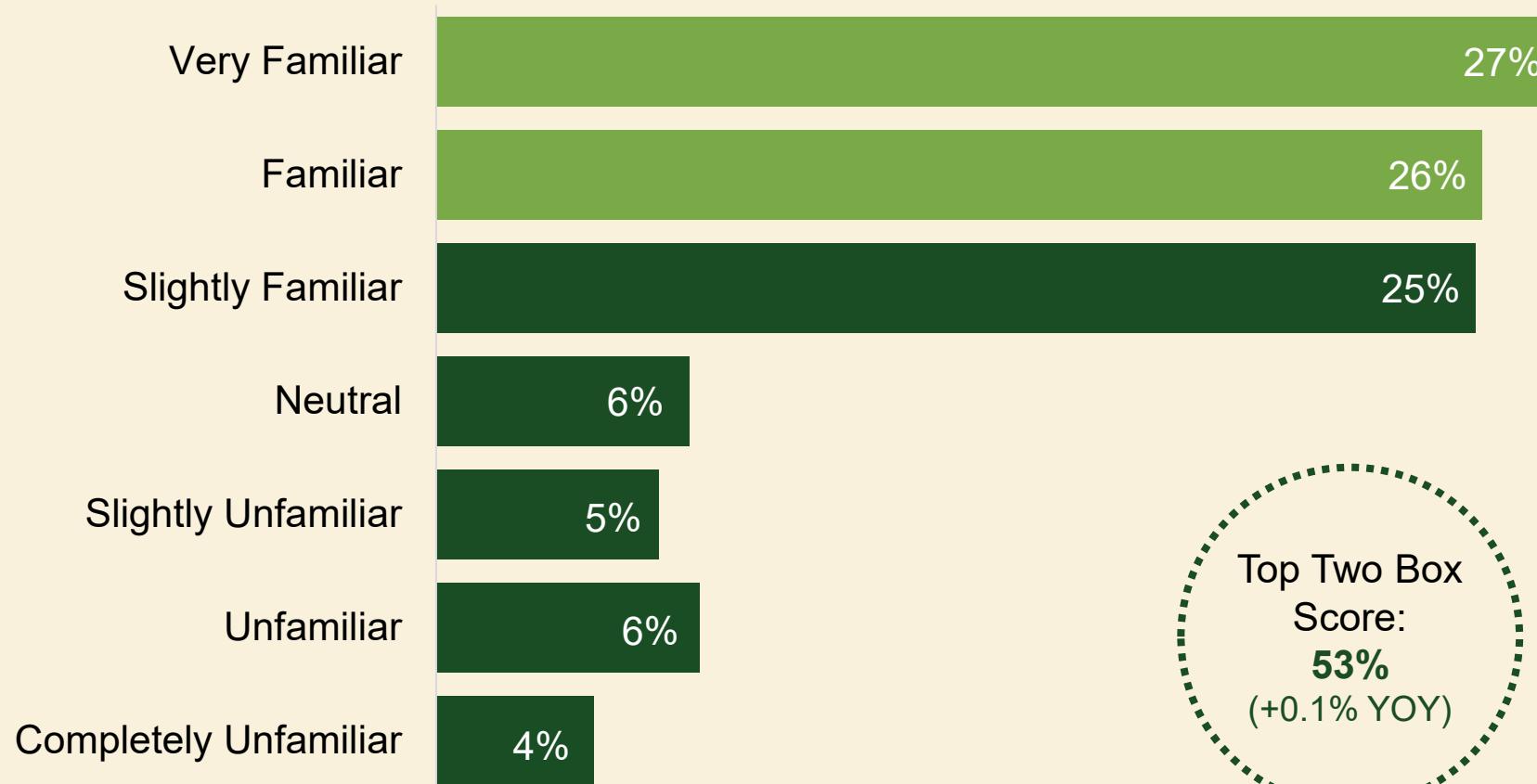


-15.8%



FAMILIARITY REMAINS RELATIVELY FLAT YEAR-OVER-YEAR WITH A Small Majority Reporting Higher Familiarity with The Presidio

QUESTION: Overall, how familiar are you with the Presidio? Base: All respondents, 1,200 responses.



Top Two Box
Score:
53%
(+0.1% YOY)

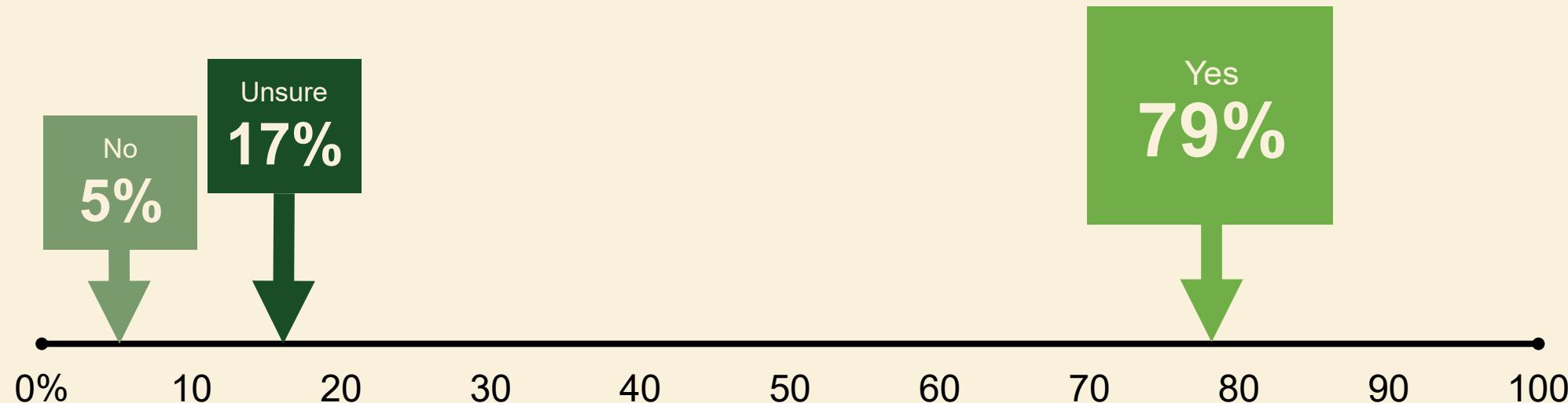


Welcoming Perceptions of the Presidio

AMONG BAY AREA RESIDENTS REMAINS RELATIVELY FLAT YEAR-OVER-YEAR

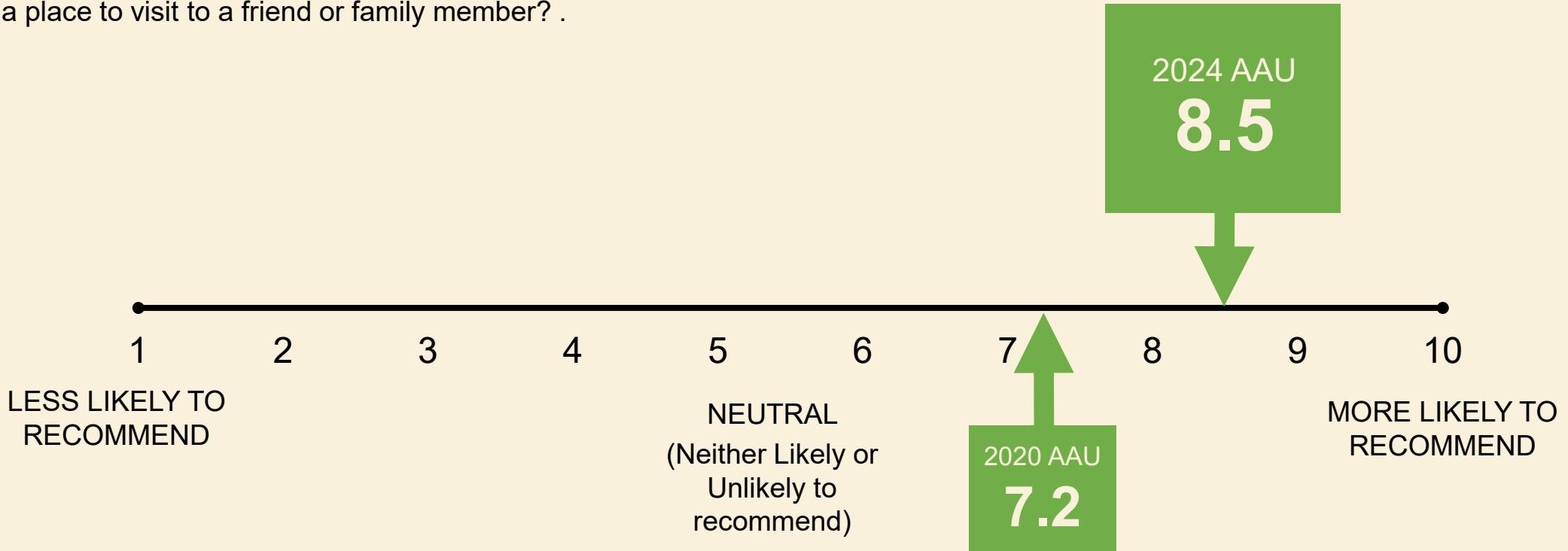
QUESTION: Do you feel the Presidio is a welcoming place for you?

Base: All respondents, 1,200 responses.



Visitors Are Having a Great Experience

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



Park Logistics Are Strong, Core Motivators for Visiting the Presidio, Along With Natural Beauty

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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Linda Butler, Director of Marketing & Communications
(lbutler@presidiotrust.gov)