

# 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

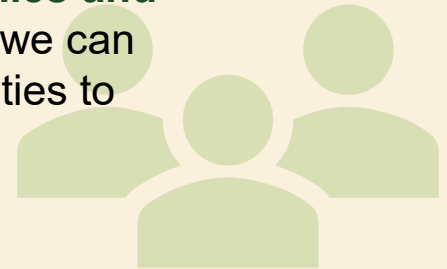
## VOLUME

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



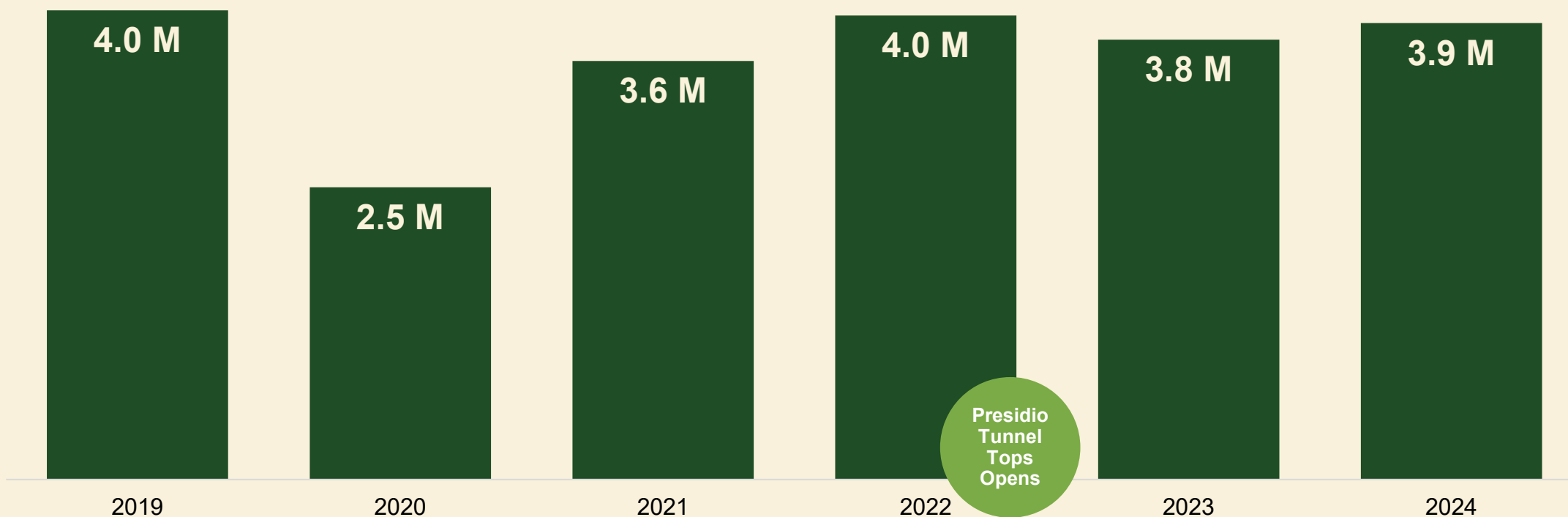
# 1

## Visitation Volume & Seasonal Trends





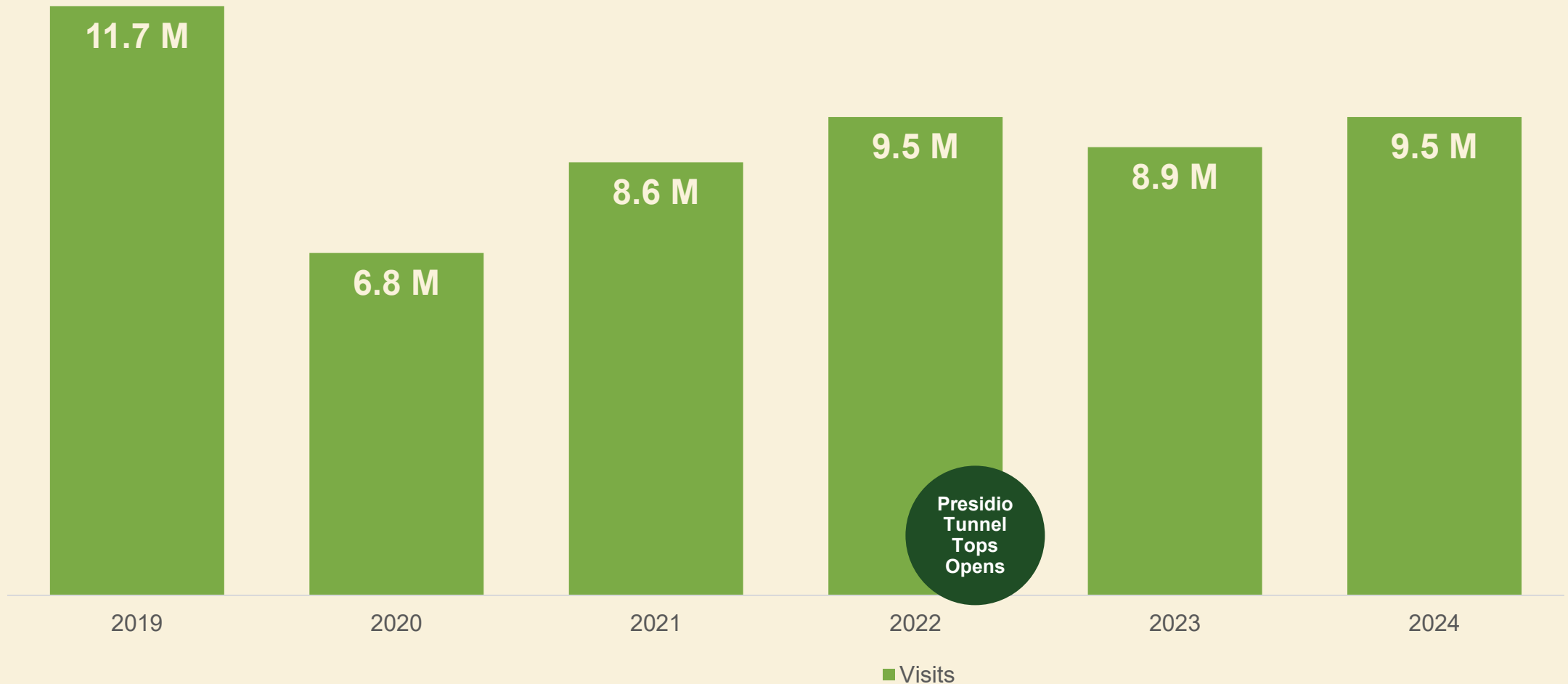
# Number of Individual Visitors Shows Some Year-over-year Growth (Domestic)





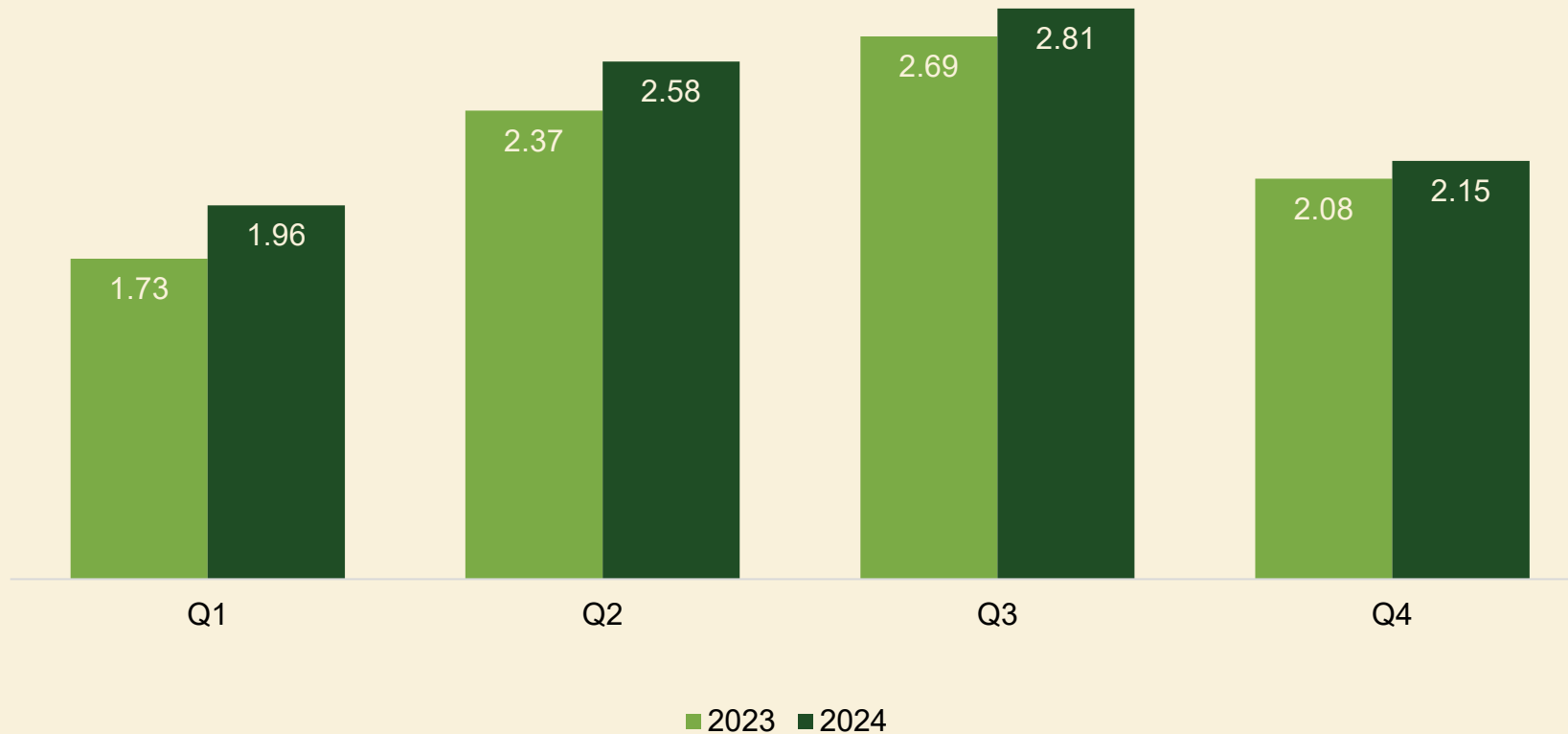
# Total Visits Are Up in 2024

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



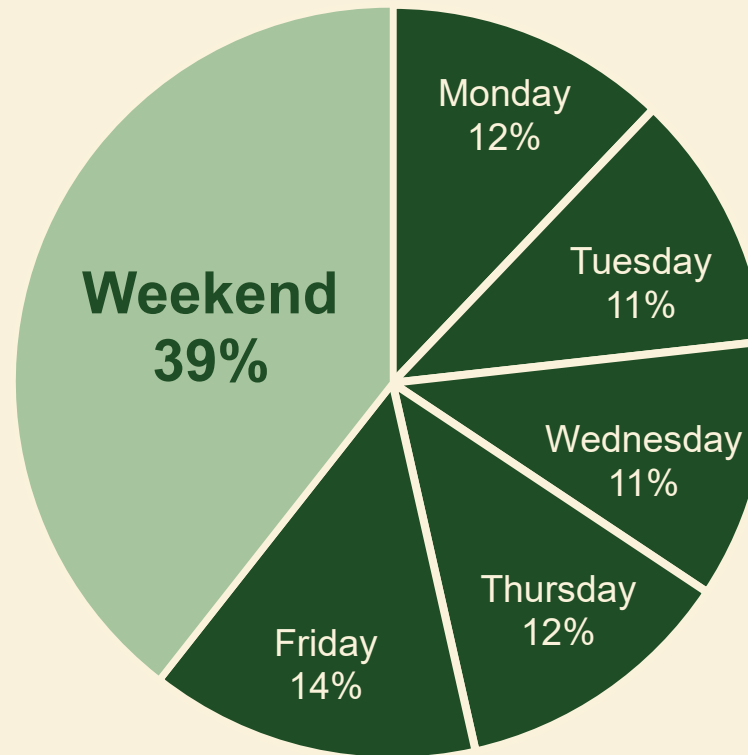
# Visits Are Up Slightly Across All Quarters

VISITS BY QUARTER (Millions)



# Visitation Distribution Remains Steady

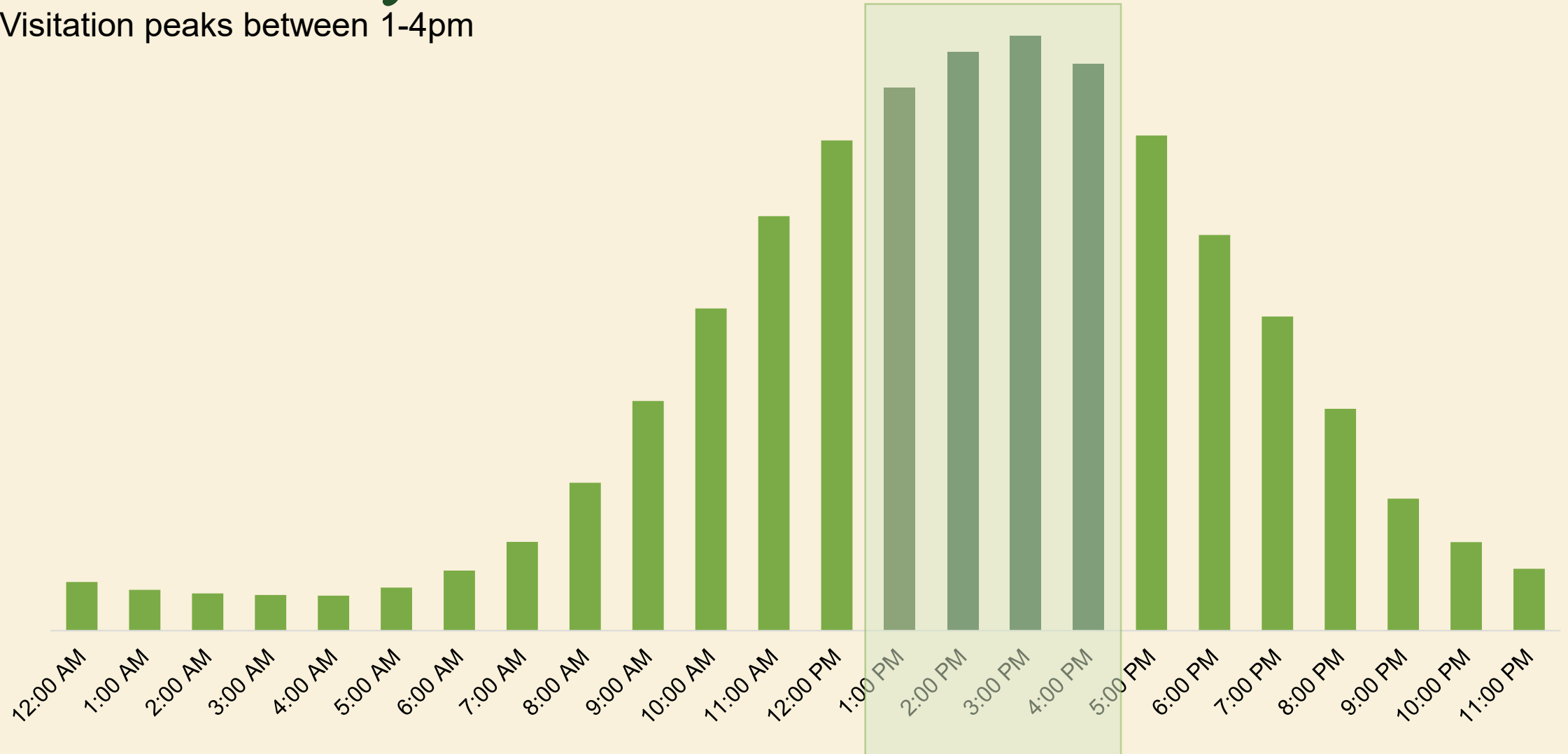
Both data sets show the highest visitation is on the weekends, followed by Friday.





# Visitation by Hour

Visitation peaks between 1-4pm



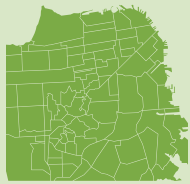
# 2

## Visitation by Geographic Origin



# Visitation by Geographic Origin

Distribution of the park's 9.5 million total visits



**3.6M**  
**San Francisco**

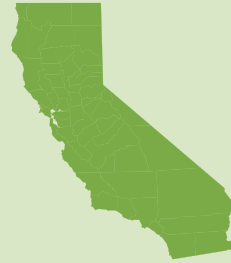
**+5.3% increase**  
from 2023 levels



**2.9M**  
**Bay Area**

Excluding San Francisco

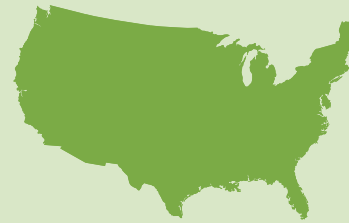
**+9.1% increase**  
from 2023 levels



**1.2M**  
**California**

Excluding Bay Area

**+9.3% increase**  
from 2023 levels



**1.1M**  
**US States**

Excluding California

**+3.2% increase**  
from 2023 levels



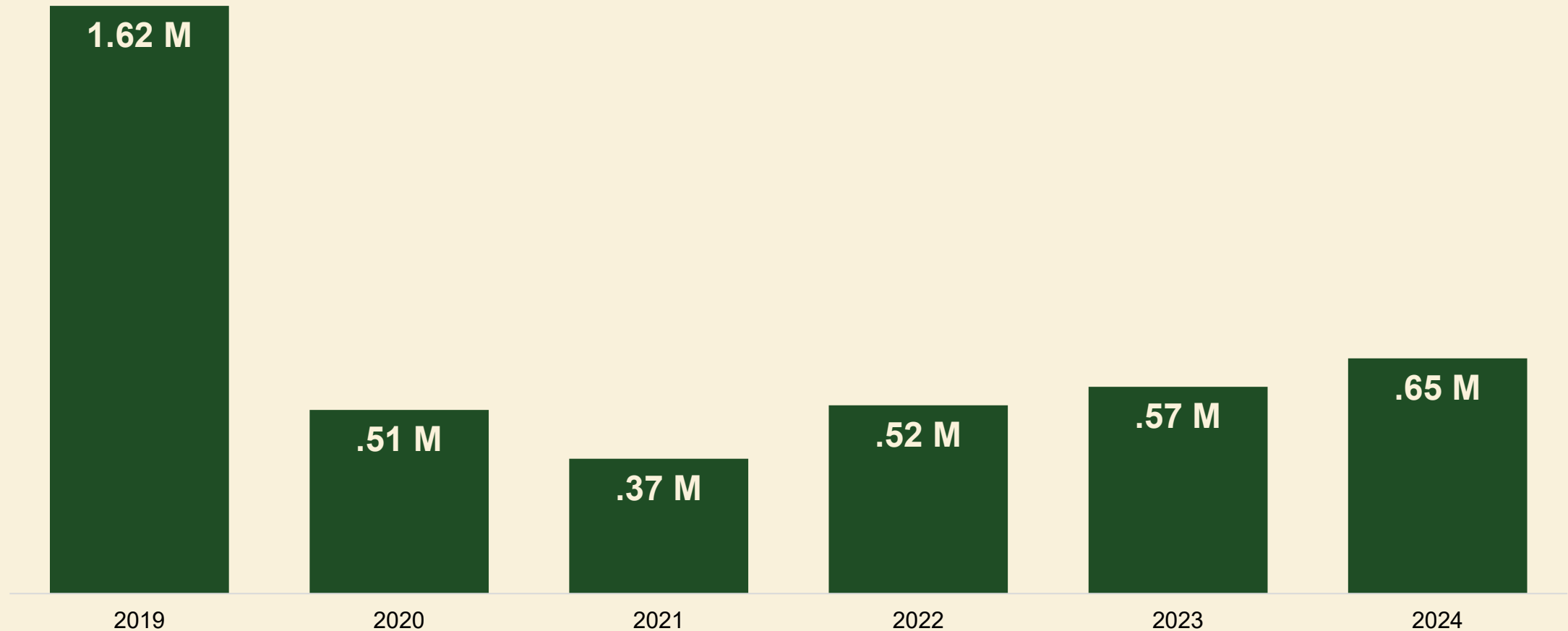
**.65M**  
**International**

**+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



# 3

## 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.

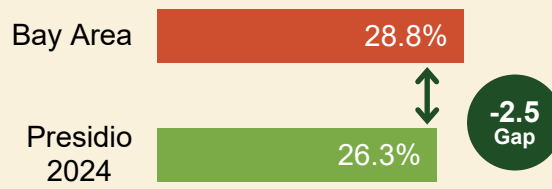


# As Low- & Middle-Income Segments Shrink, the Presidio's Share Holds Steady

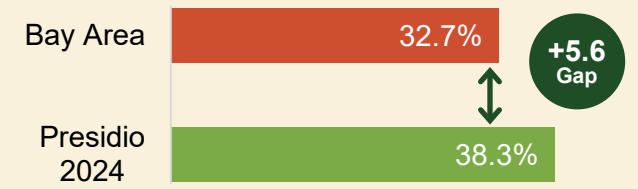
## Low Income: 2024



## Middle Income: 2024



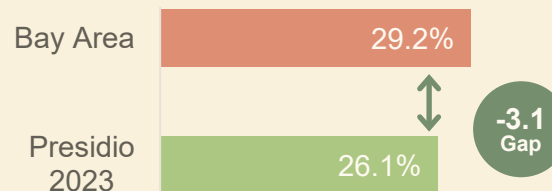
## High Income: 2024



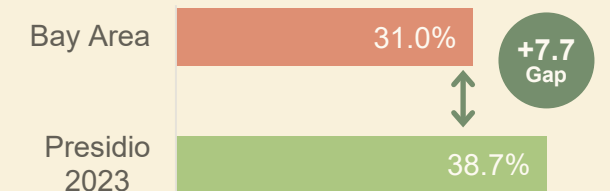
## Low Income: 2023



## Middle Income: 2023



## High Income: 2023



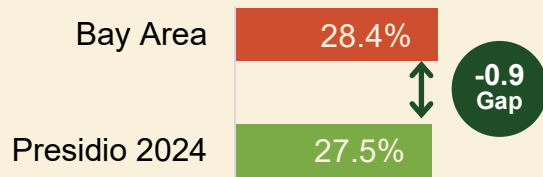
Low Income is Household Income (HHI) of \$0-99.9K, Middle Income HHI \$100K-200K, High Income HHI \$200K+

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.

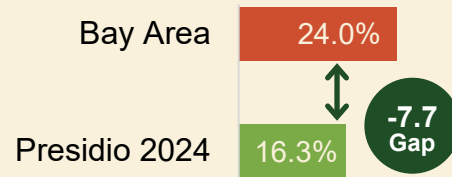


# Demographic Shifts in 2024 Visits Largely Reflected Bay Area Demographic Shifts

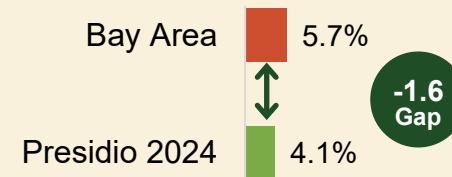
## Asian: 2024



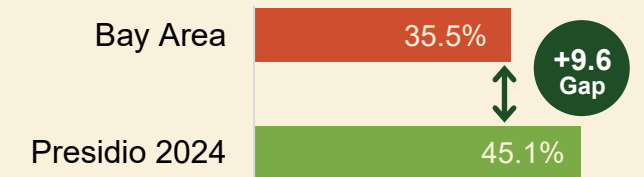
## Hispanic: 2024



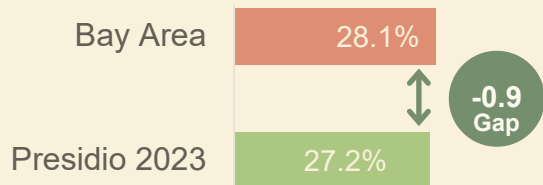
## Black: 2024



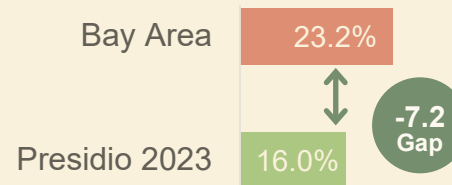
## White: 2024



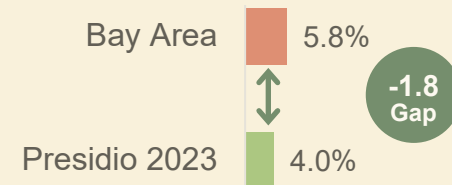
## Asian: 2023



## Hispanic: 2023



## Black: 2023

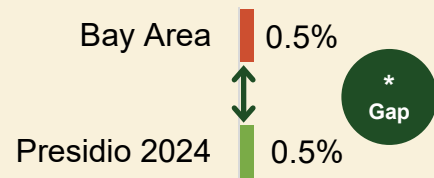


## White: 2023

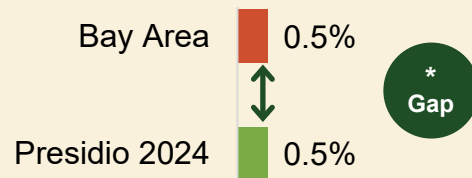


# Slim Visitation Gaps Hold Fairly Steady

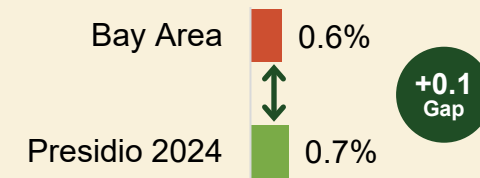
## Native American: 2024\*



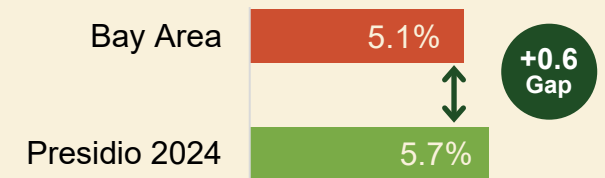
## Native Hawaiian/PI: 2024\*



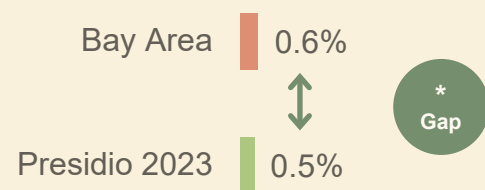
## Some Other Race: 2024



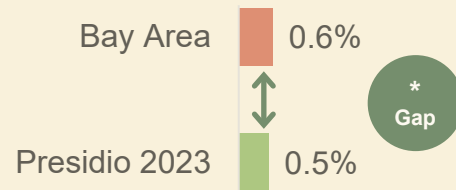
## Two or More Races: 2024



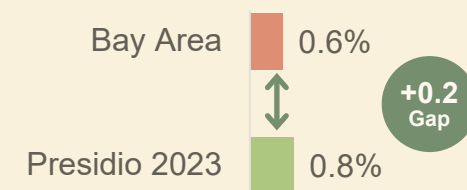
## Native American: 2023\*



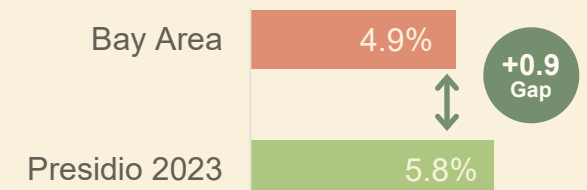
## Native Hawaiian/PI: 2023\*



## 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.



# 4

## Visitor Attitudes, Perceptions & Sentiments

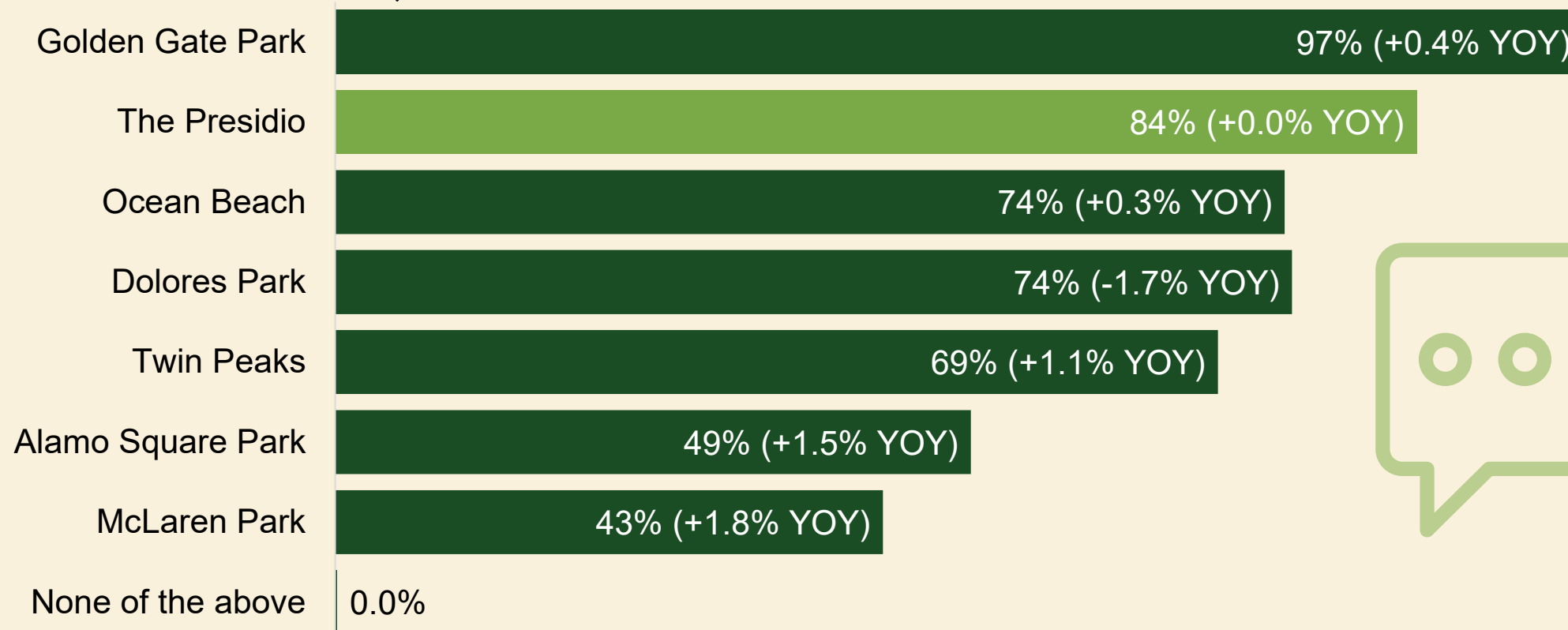




# Overall Aided Awareness of the Presidio Remains High, Flat Year-Over-Year

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

Base: All respondents, 1,200 responses.

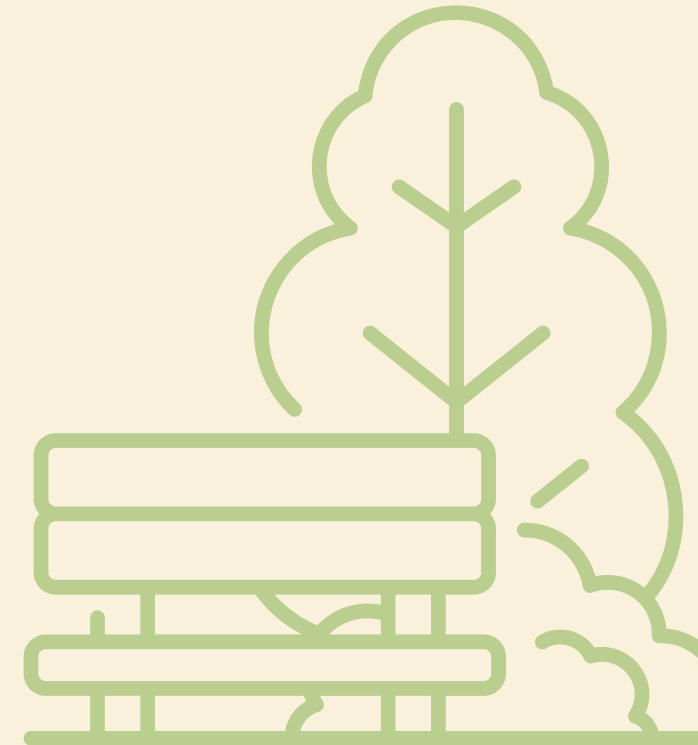
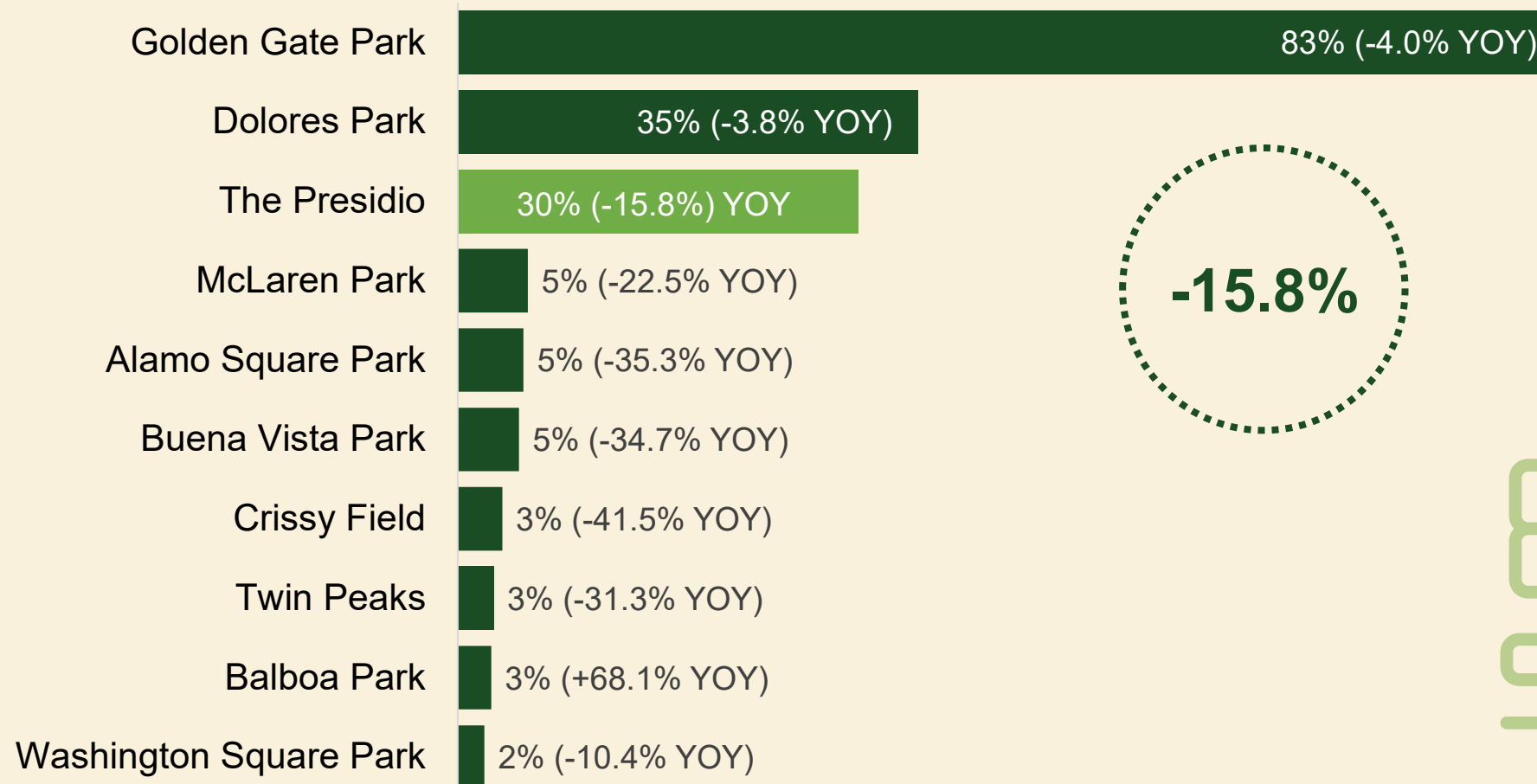


## MENTIONS OF THE PRESIDIO AS A

# Top-of-Mind San Francisco Park Declined, Along with Other Parks in the City

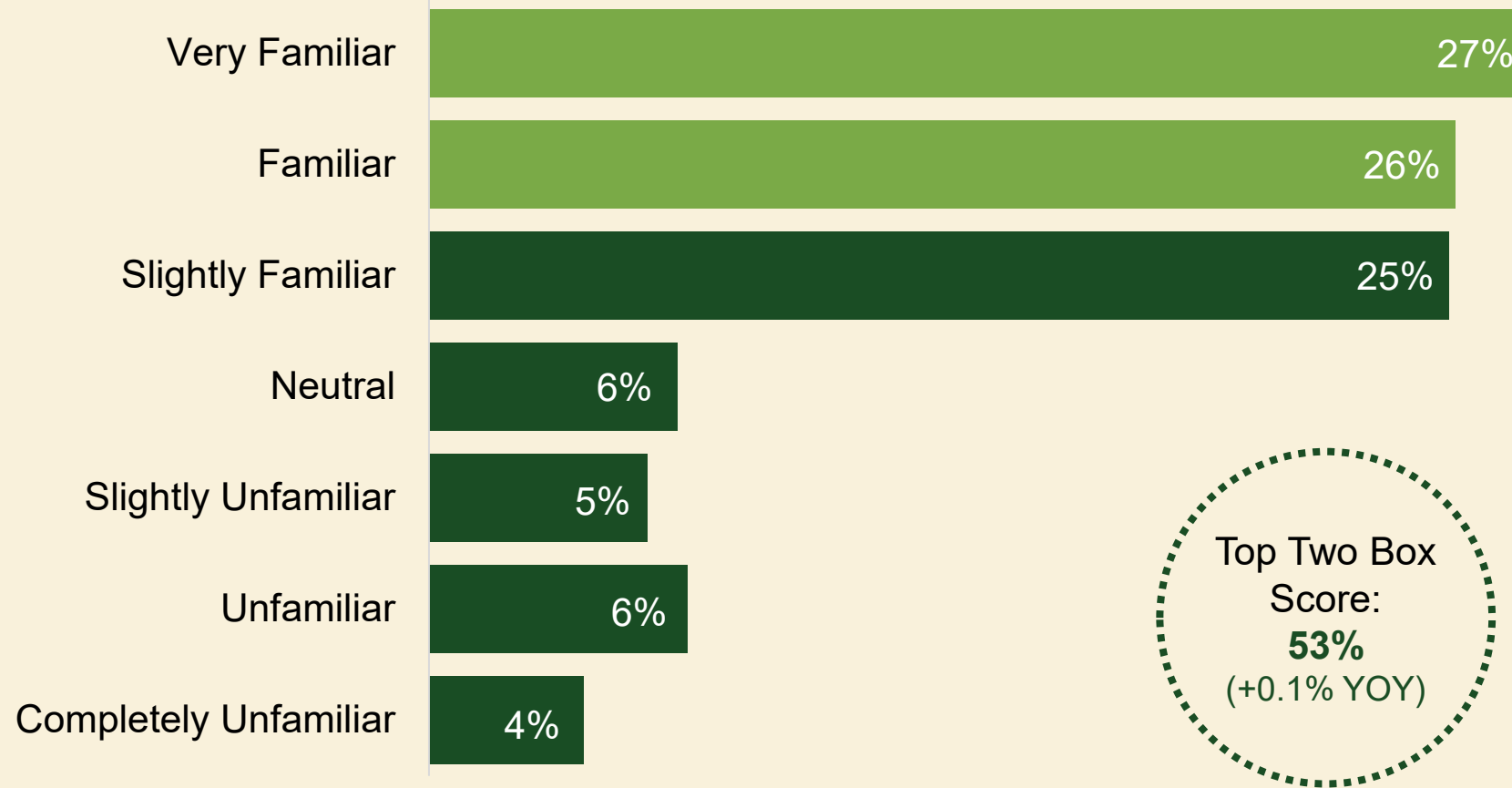
**QUESTION:** When you think of San Francisco, what parks in the city first come to mind? (Unaided)

Base: 1,184 responses



# 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.

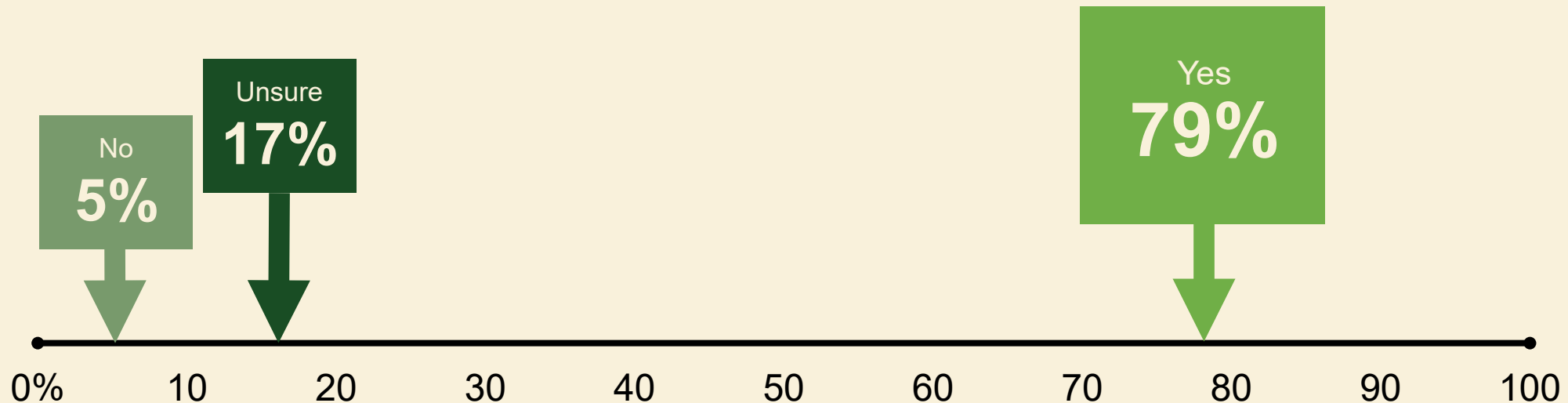


# Welcoming Perceptions of the Presidio

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

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

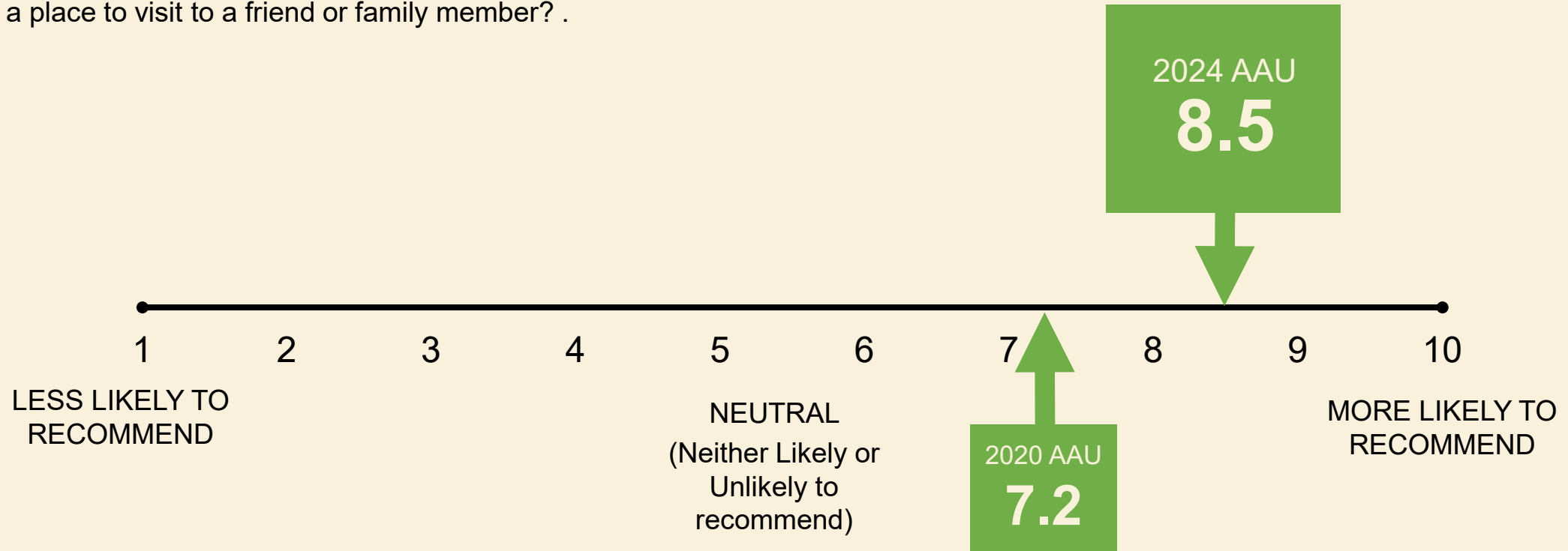
Base: All respondents, 1,200 responses.





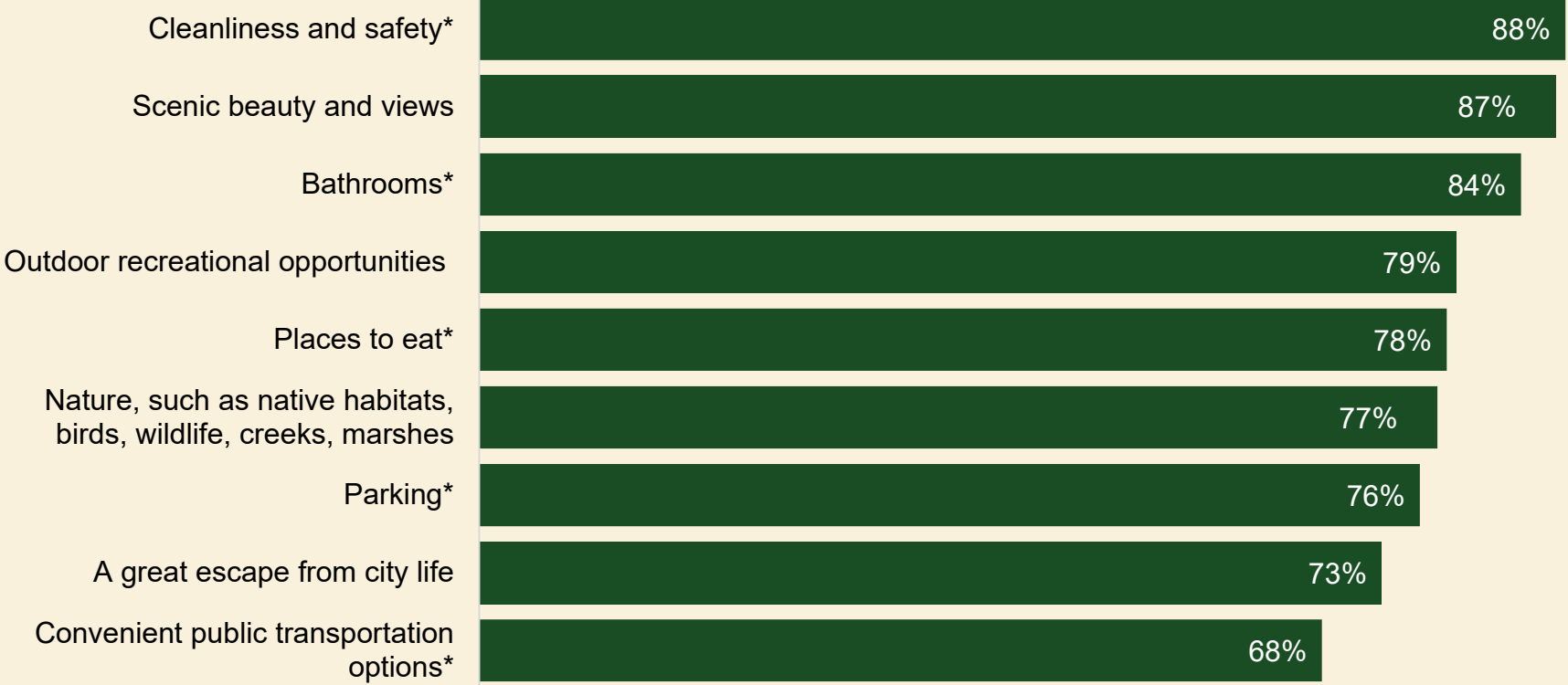
# Visitors Are Having a Great Experience

**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”

\*Tracking began with the 2024 AAU Study

# Thank You

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