

2025 Visitor Profile Report

June 25, 2026

PRESIDIO
TRUST



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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



Measure visitation trends 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

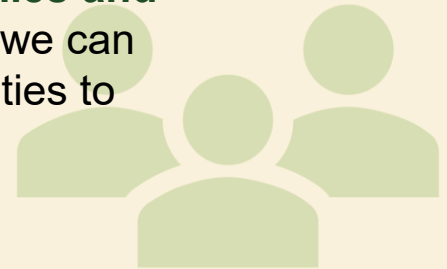
VOLUME

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

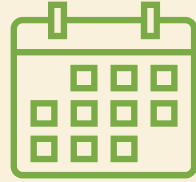


Executive Summary



Are more people visiting us?

- Visitation held steady at 9.5 million total visits
- More individual (domestic) visitors came than we've recorded before



When are they visiting us?

- Visits were up Jan-June; down July-Dec
- Q3 (July-Sept) continues to contribute the largest visitation volume



Where are visitors coming from?

- Highest growth was from California and the wider Bay Area
- We saw declines from San Francisco and International visitors



Who are the people visiting us?

- Visitor demographics shifted to more closely mirror Bay Area audience demographics



How do they feel about us?

- Awareness and familiarity are deepening, suggesting stronger connection to the park

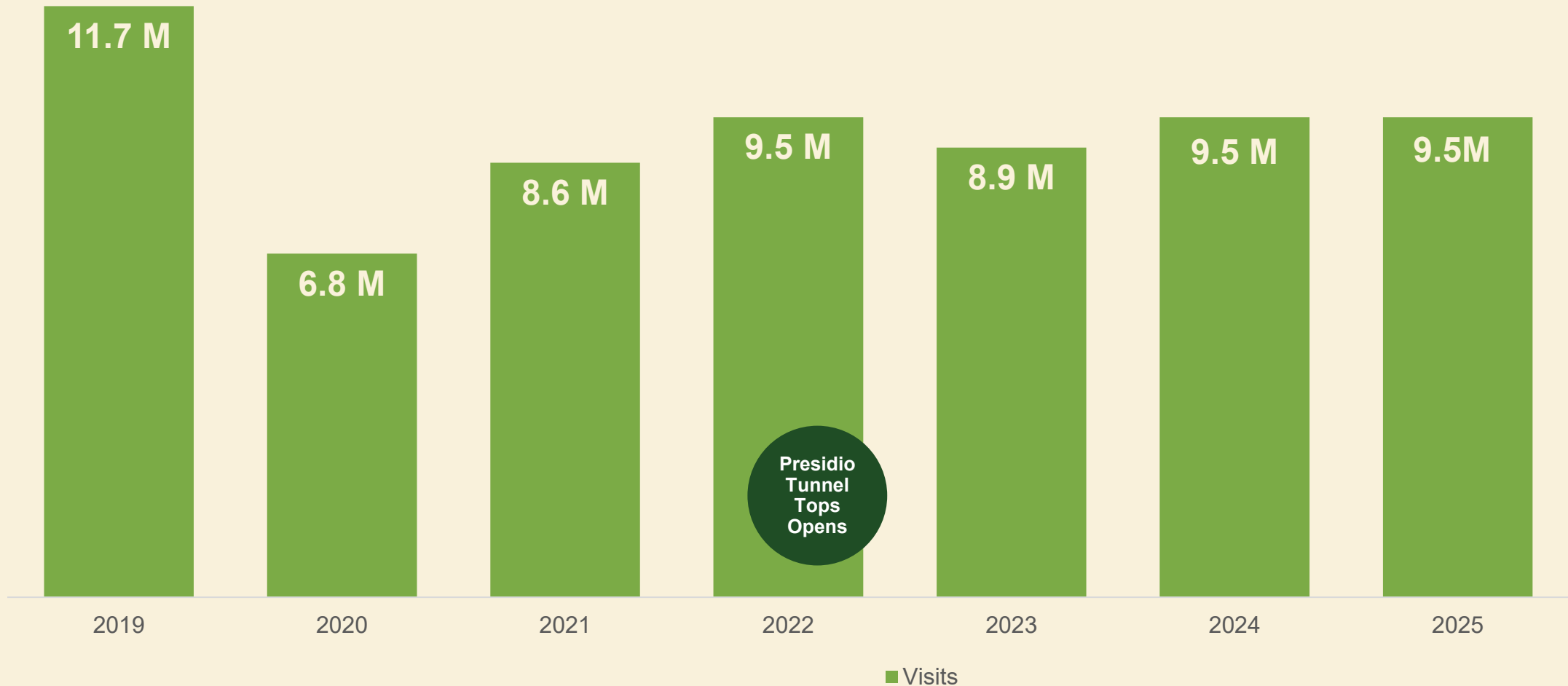
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Visitation Volume & Seasonal Trends

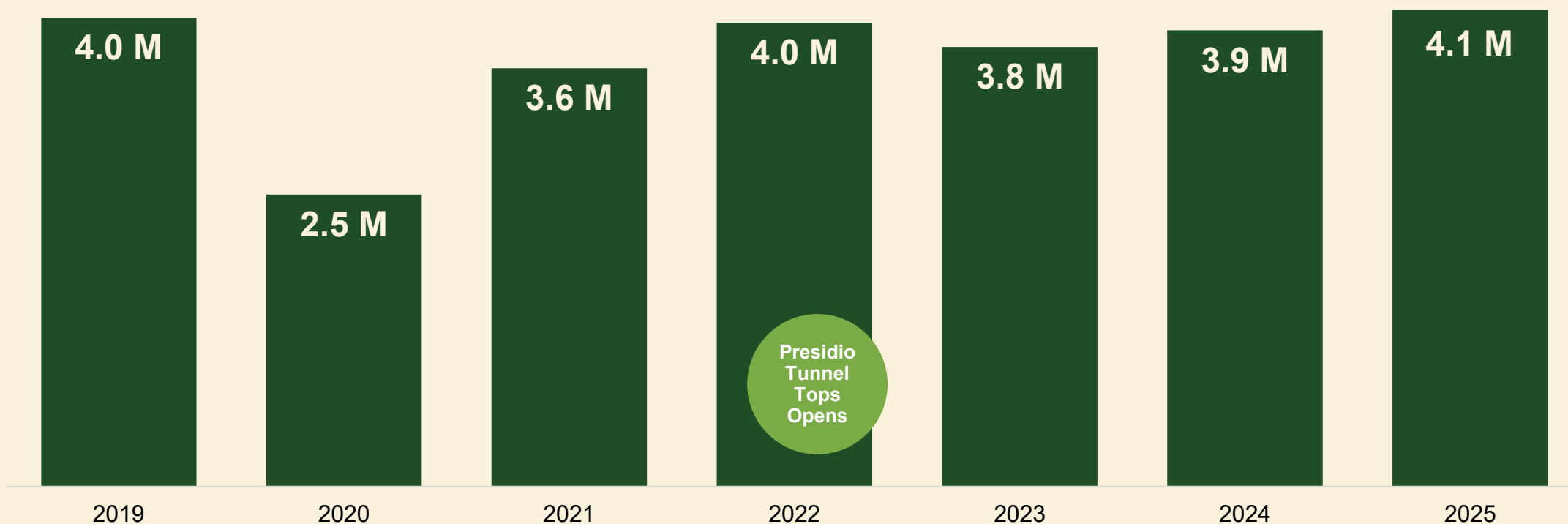


Total Visits Held Steady in 2025

With international travel slowest to rebound, visitation has not returned to pre-pandemic levels.



We Reached Our Highest Annual Visitor Count To Date (Domestic)



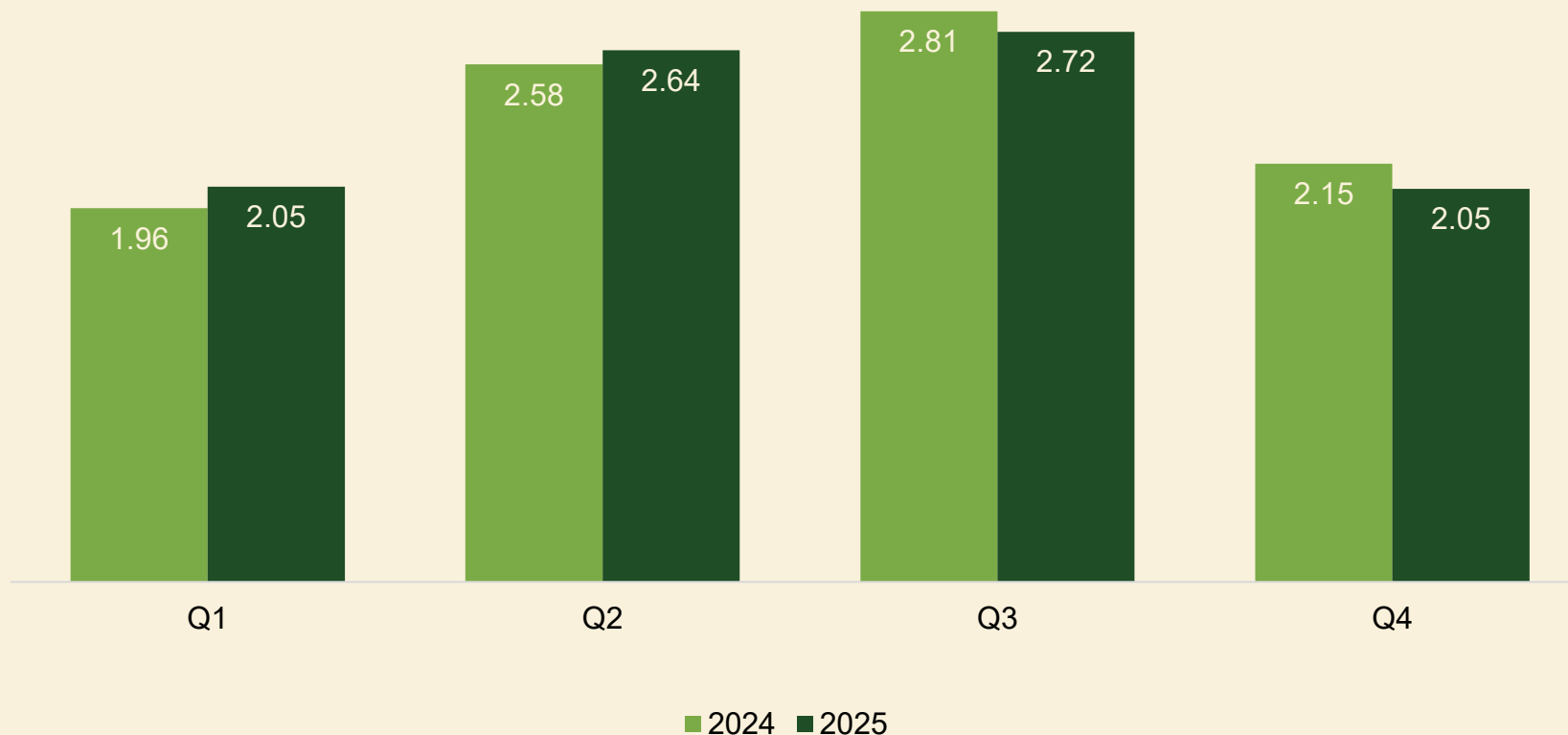
Presidio Is A Highly Visited National Park Site



Growth in First Half of Year Offset the Declines in the Second Half

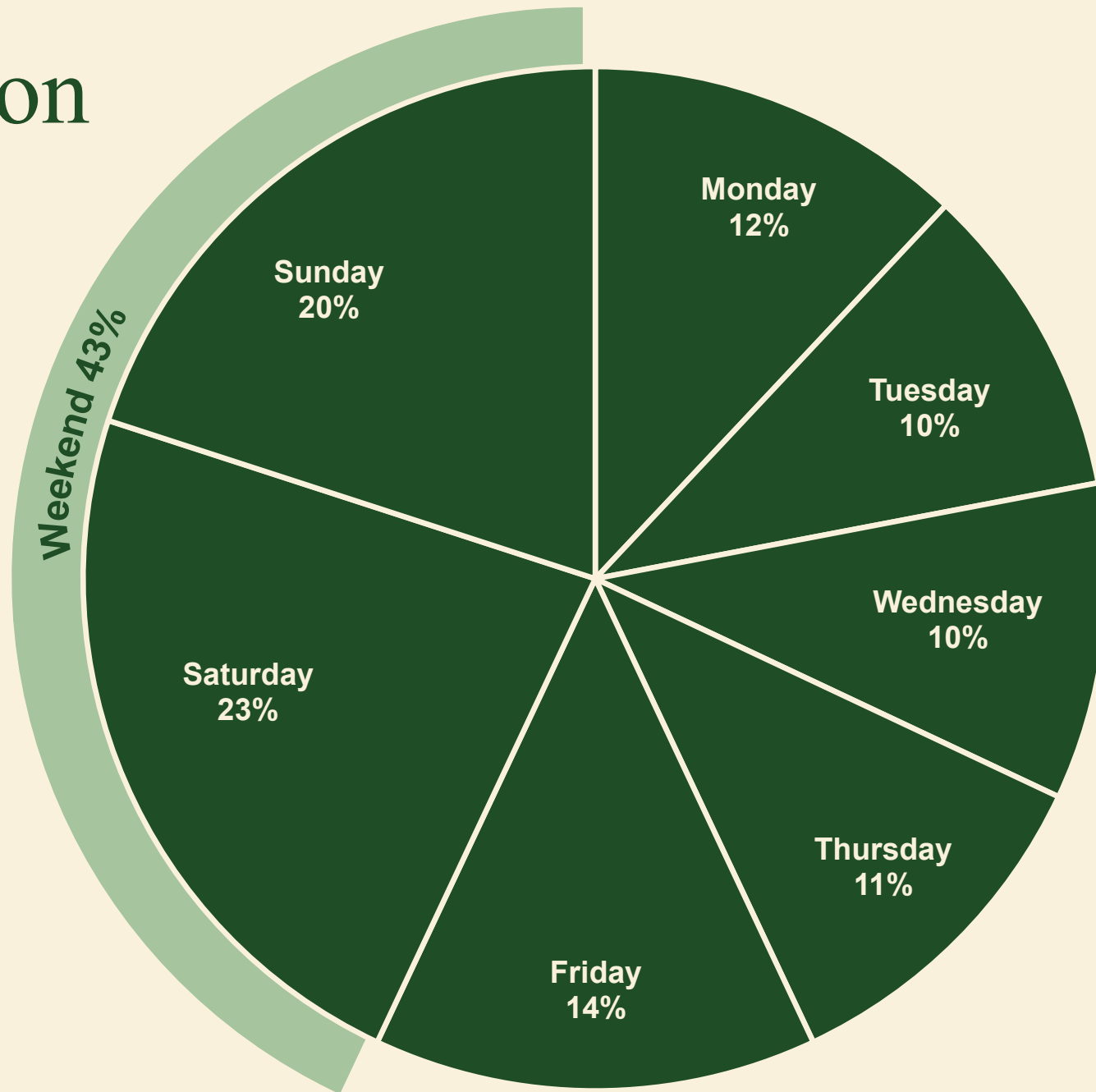
Unfavorable weather a likely contributor to the dip in the second half of the year.

VISITS BY QUARTER (Millions)



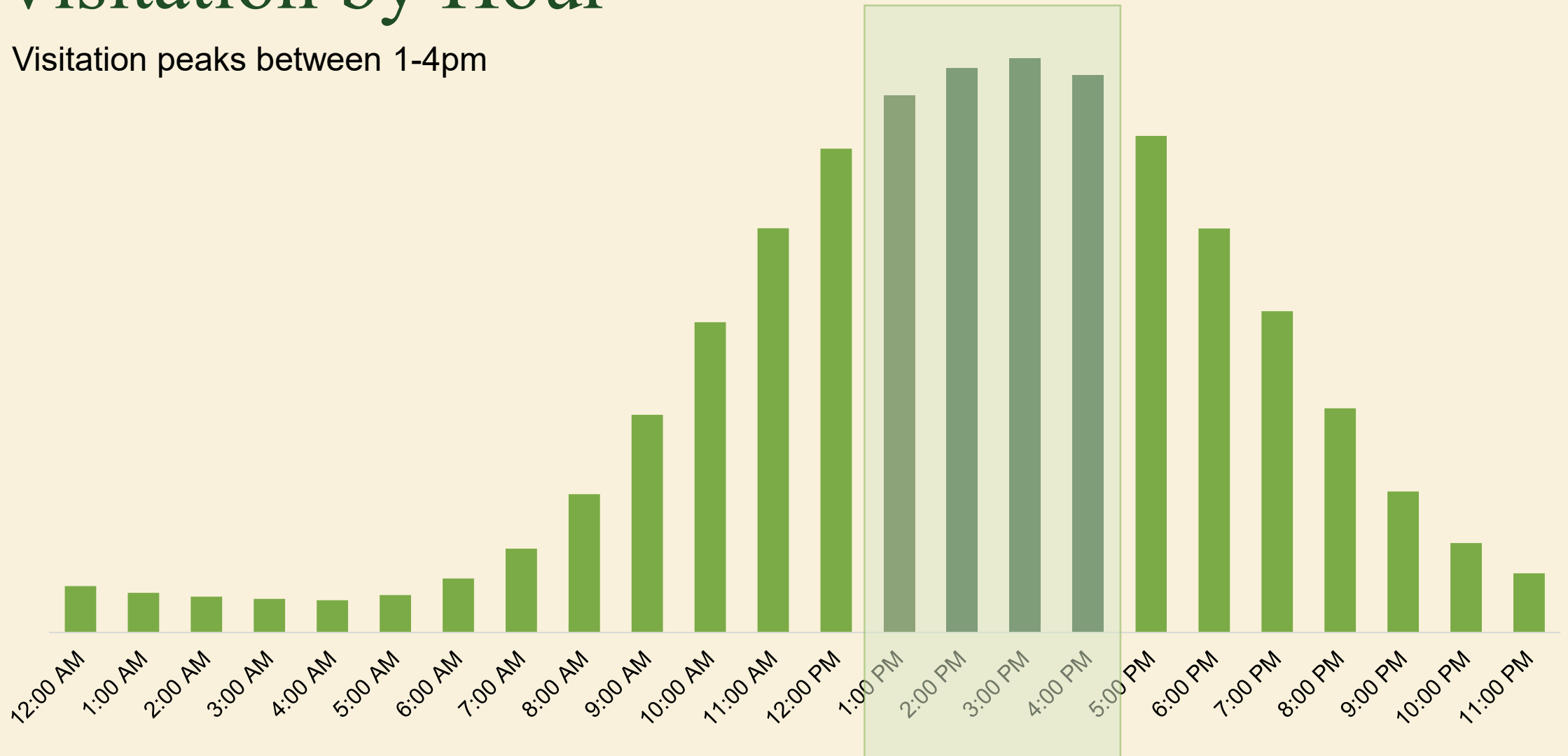
Weekend Distribution Up Slightly

Weekends exhibit the highest visitation, followed by Fridays. Weekend visitation share expanded from 39% to 43% this year.



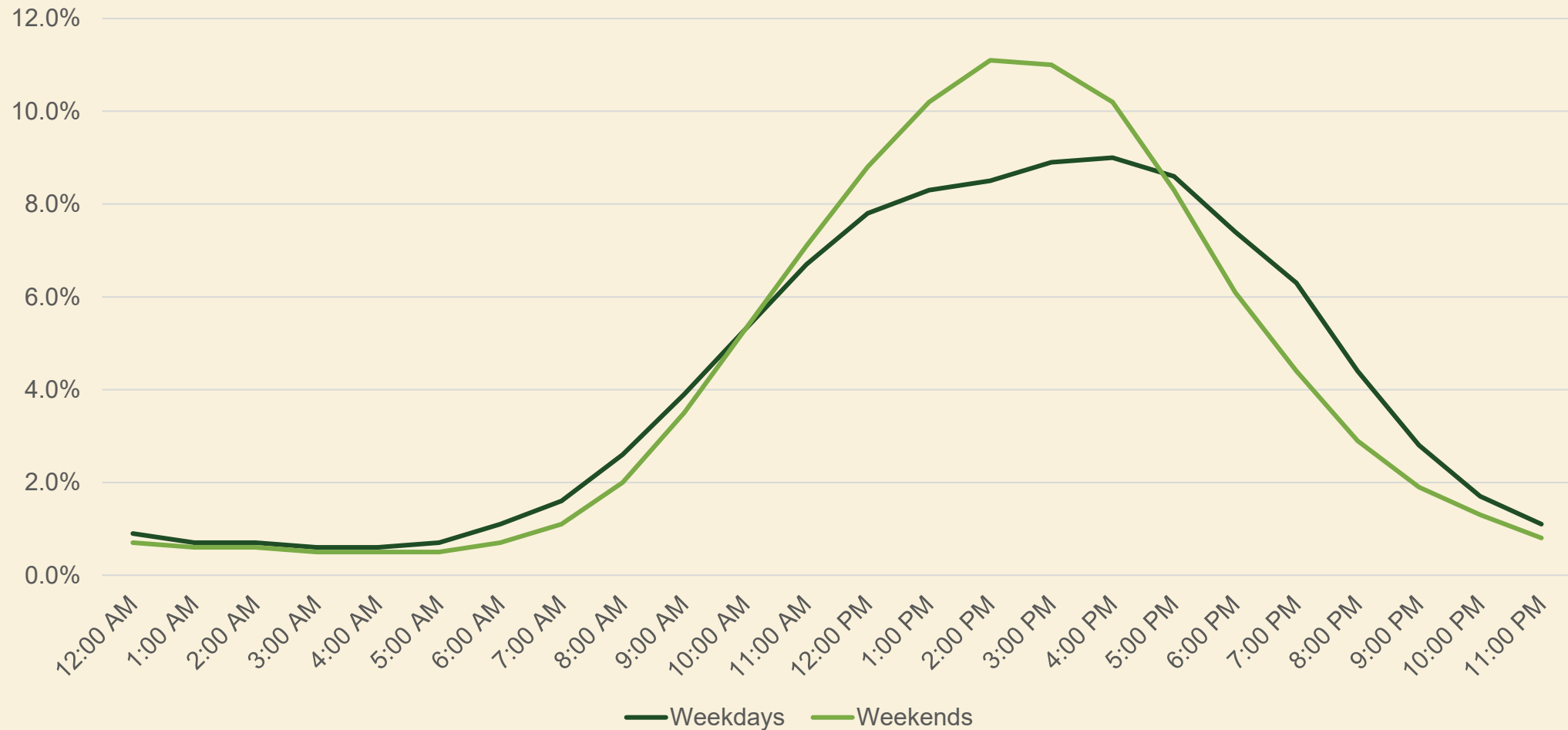
Visitation by Hour

Visitation peaks between 1-4pm



Day of Week: Hourly Visits

% of Visits by hour demonstrate that weekday visitors use the park more in the morning and evening hours as compared to weekend visitors



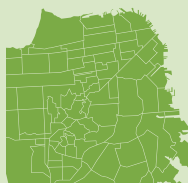
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Visitation by Geographic Origin



Visitation by Geographic Origin

Distribution of the park's 9.5 million total visits



3.4M
San Francisco

6% decrease
from 2024 levels



3.0M
Bay Area

Excluding San Francisco

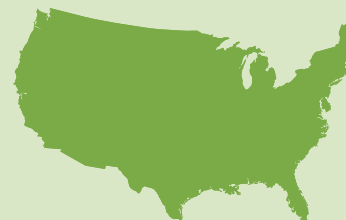
+3% increase
from 2024 levels



1.3M
California

Excluding Bay Area

+5% increase
from 2024 levels



1.2M
US States

Excluding California

+4% increase
from 2024 levels

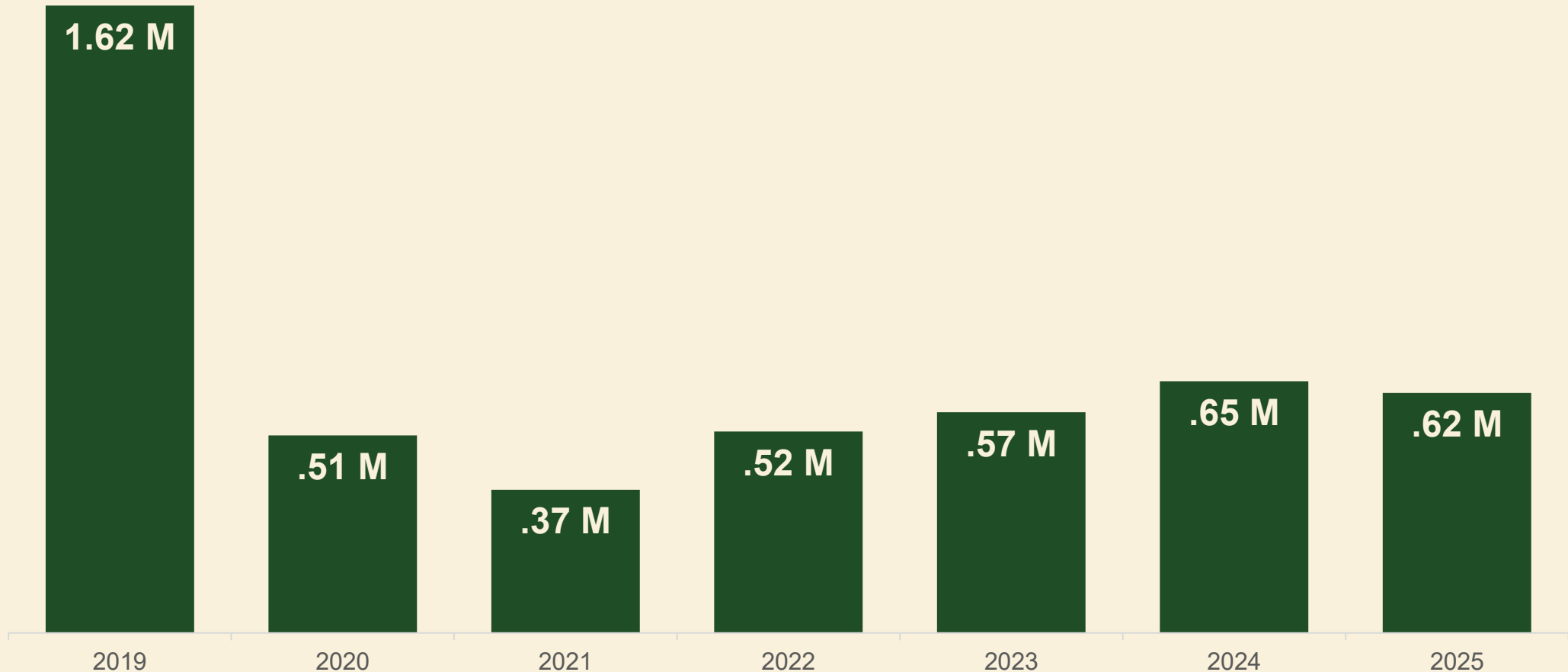


0.6M
International

4% decrease
from 2024 levels

International Visitation Recovery Stalled

Visits from Mexico, South Korea and Canada continued to make up the largest share of international visitation, although Canada's share decreased 17% v 2024. While the top 10 countries have remained consistent from historical years, the visitation volume from them is lower across the board.



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Bay Area Visitation Demographics

A Note About Demographic Data Collection:

We collect data on visitation geographies and can link those geographies to US Census Block Group (CBG) demographic data. This allows us to compare the park's visitation to the Bay Area population, which helps us to identify where there are opportunities to grow our visitation.



Income Demographics More Closely Mirrored Bay Area Demographics

Low Income: 2025



Middle Income: 2025



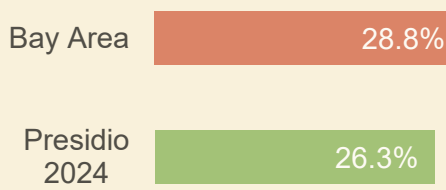
High Income: 2025



Low Income: 2024



Middle Income: 2024



High Income: 2024

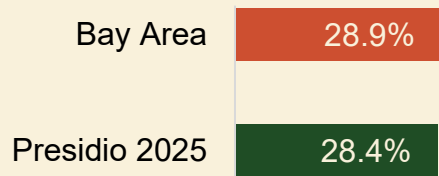


Low Income is Household Income (HHI) of \$0-99.9K, Middle Income HHI \$100K-200K, High Income HHI \$200K+

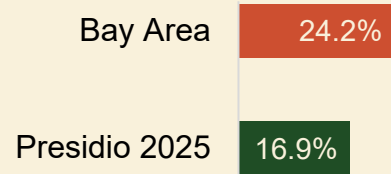
Source: Placer.ai Property Report with 15-minute visit minimum and 52-visit frequency cap. Report uses the US Census Bureau's 2023 American Community Survey Five-Year Estimates (ACS) for 2024 population data, and the 2024 ACS for the 2025 population data. Visitation demographics are reported based on total visits within a 55-mile ring radius compared to the US Census figures of that same radius.

Race/Ethnicity Demographics More Closely Mirrored Bay Area Demographics

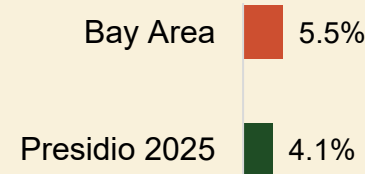
Asian: 2025



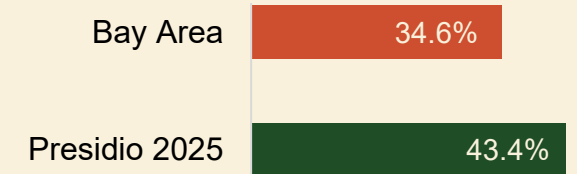
Hispanic: 2025



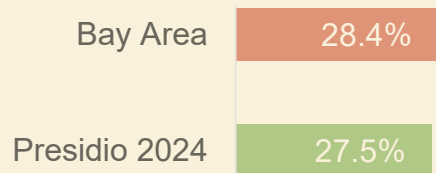
Black: 2025



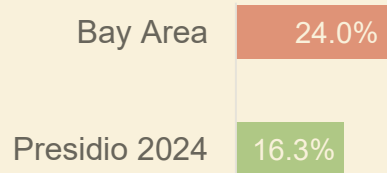
White: 2025



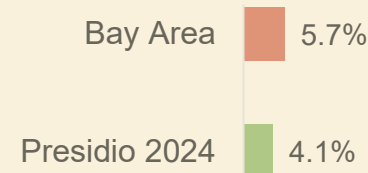
Asian: 2024



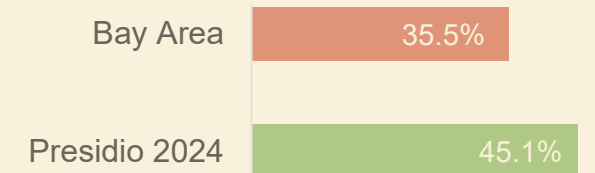
Hispanic: 2024



Black: 2024

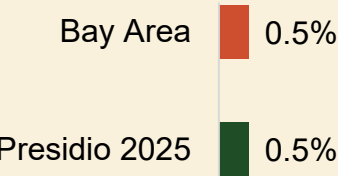


White: 2024

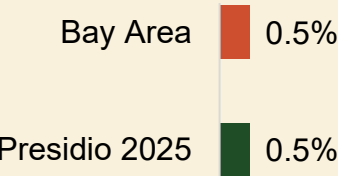


Race/Ethnicity Demographics More Closely Mirrored Bay Area Demographics

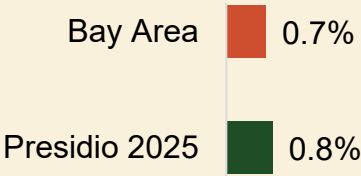
Native American: 2025*



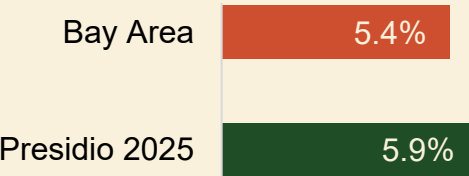
Native Hawaiian/PI: 2025*



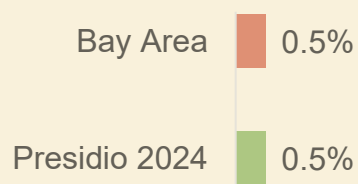
Some Other Race: 2025



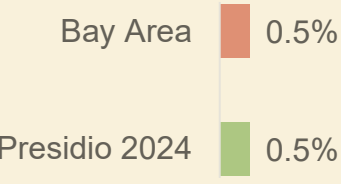
Two or More Races: 2025



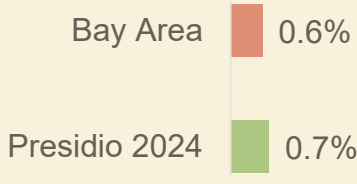
Native American: 2024*



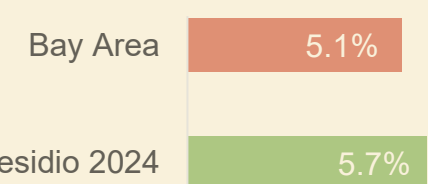
Native Hawaiian/PI: 2024*



Some Other Race: 2024



Two or More Races: 2024



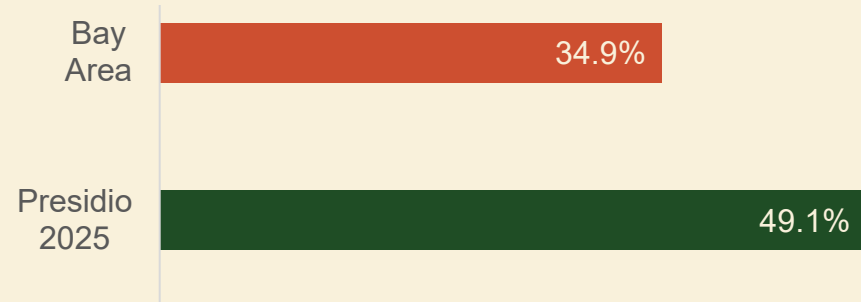
*Note: Numbers <0.5% will be reported as 0.5%
Source: Placer.ai Property Report with 15-minute visit minimum and 52-visit frequency cap. Report uses the US Census Bureau's 2023 American Community Survey Five-Year Estimates (ACS) for 2024 population data, and the 2024 ACS for the 2025 population data. Visitation demographics are reported based on total visits within a 55-mile ring radius compared to the US Census figures of that same radius.

Household Composition Demographics More Closely Mirrored Bay Area Demographics

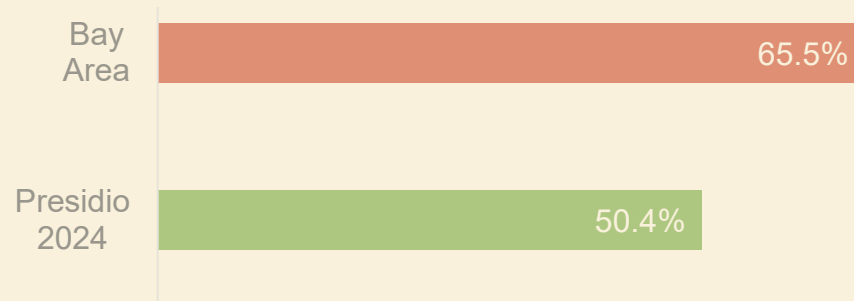
Family Households: 2025



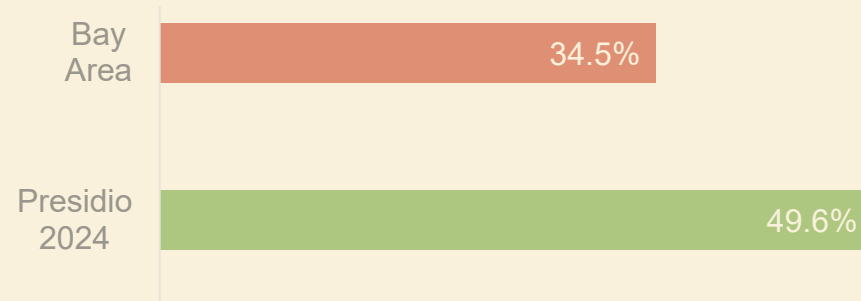
Non-Family Households: 2025



Family Households: 2024



Non-Family Households: 2024



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Visitor Attitudes, Perceptions & Sentiments

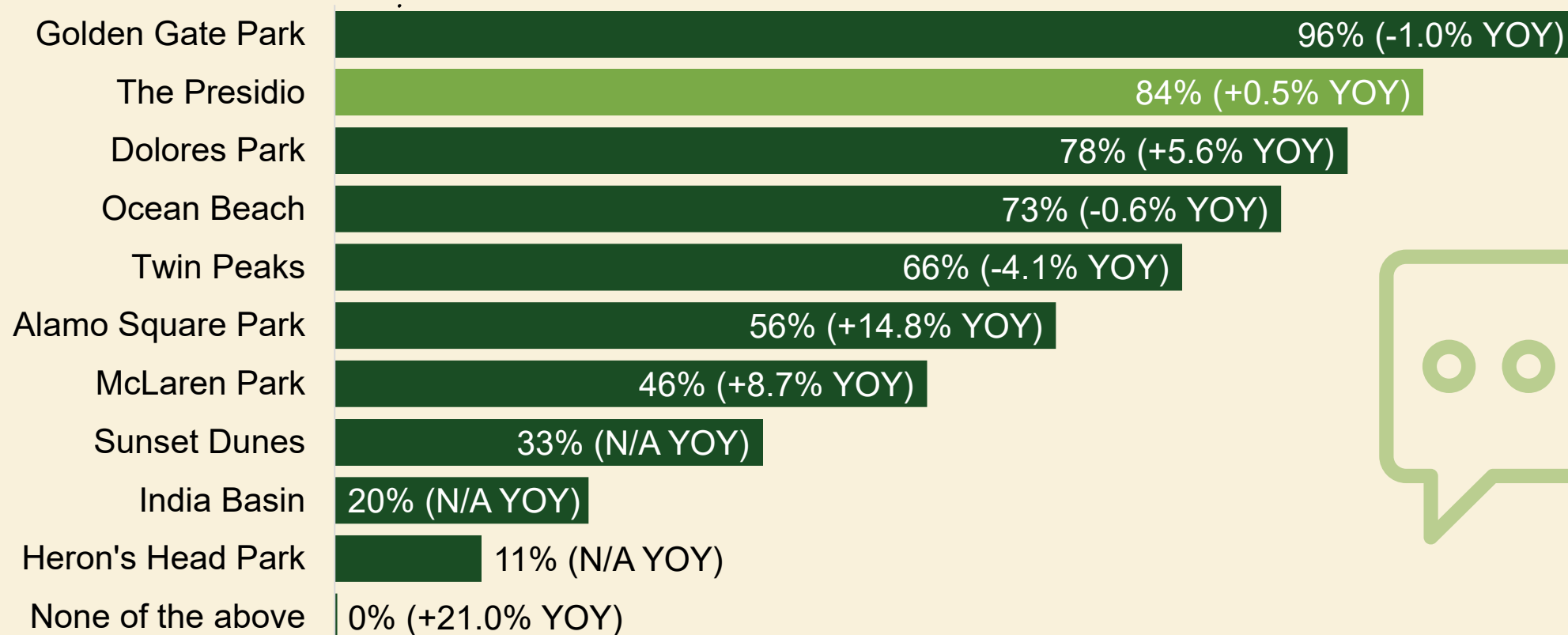


AMIDST INCREASED AIDED AWARENESS OF CERTAIN OTHER CITY PARKS,

Total Aided Awareness of the Presidio Continues to Record High, Steady Levels 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.

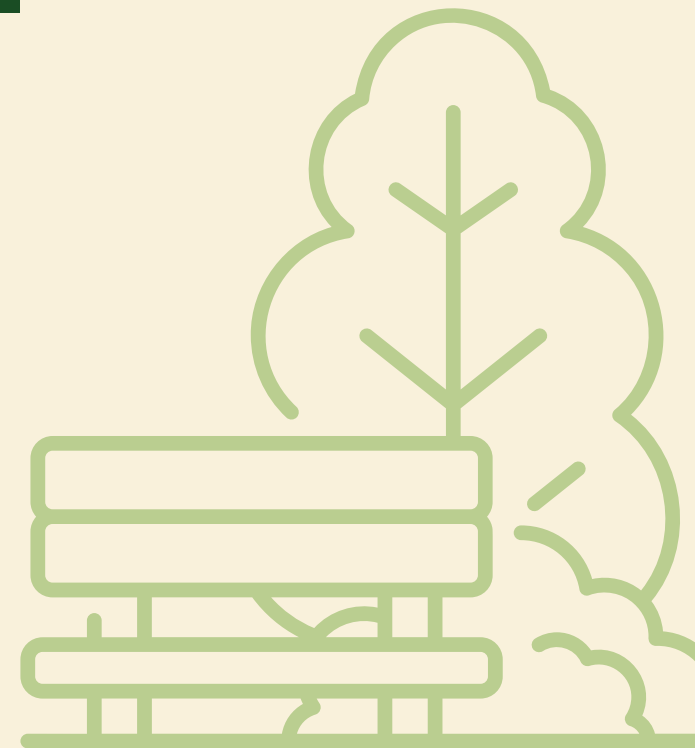
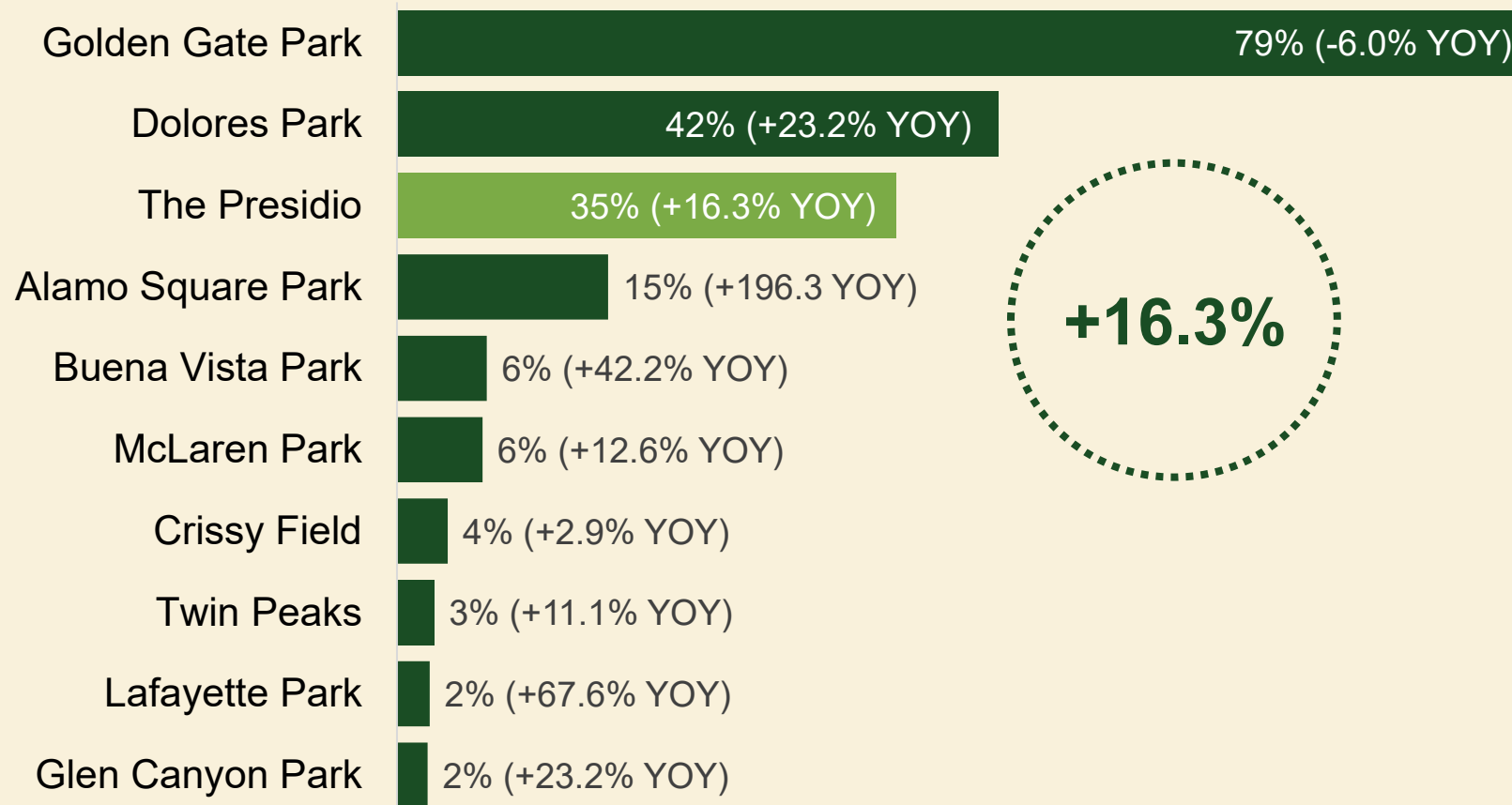


UNAIDED MENTIONS OF THE PRESIDIO AS A

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

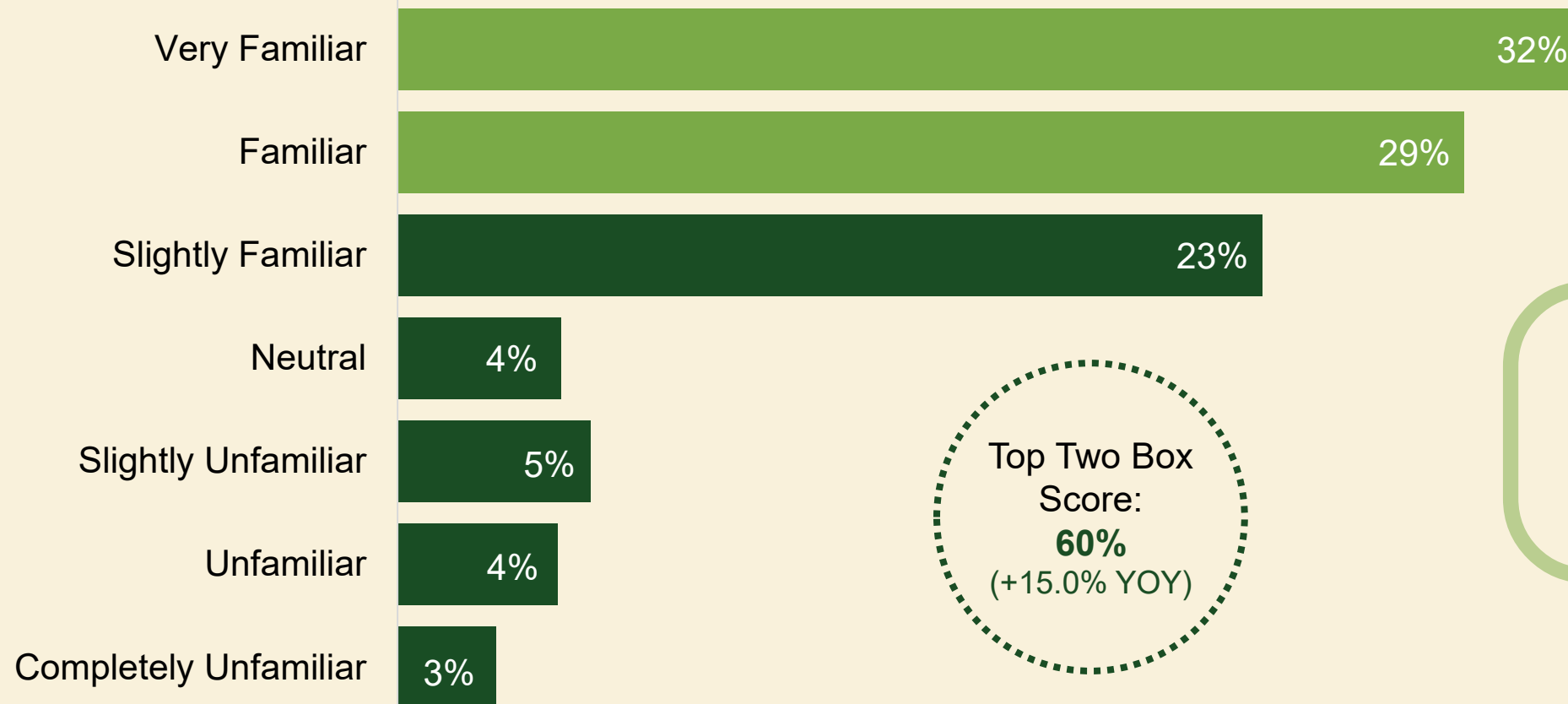
QUESTION: When you think of San Francisco, what parks in the city first come to mind? (Unaided)

Base: 1,167 responses



THERE WERE GAINS IN FAMILIARITY YEAR-OVER-YEAR, WITH Six in Ten Reporting Higher Familiarity with the Presidio This Year

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



Welcoming Perceptions of the Presidio

SHOWED SLIGHT INCREASES YEAR-OVER-YEAR

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

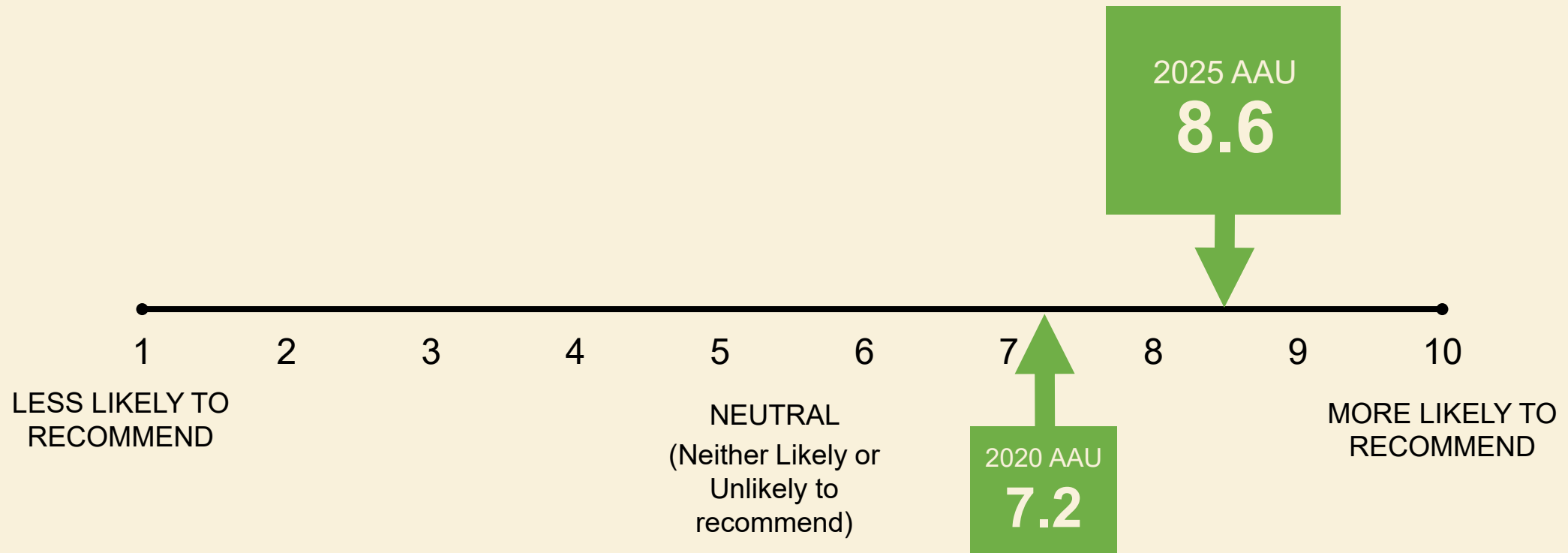
Base: All respondents, 1,200 responses.



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?

Base: Respondents who have visited the Presidio within the past 12 months

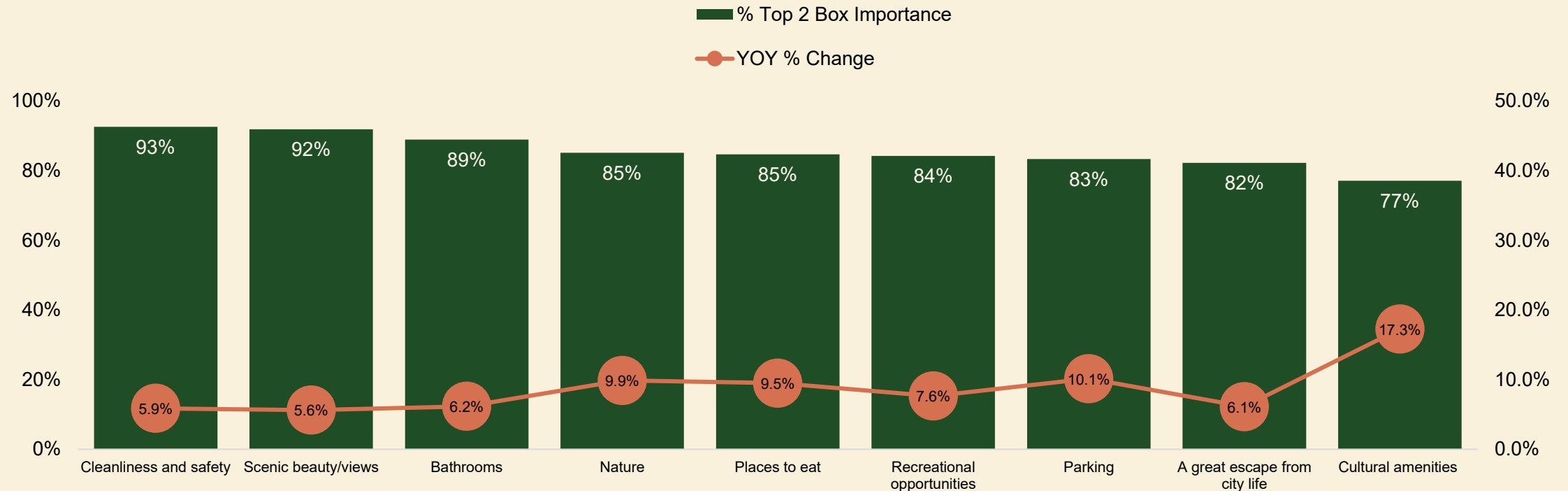


CLEANLINESS, SAFETY, SCENIC VIEWS STILL RANK HIGHEST AS KEY MOTIVATORS;

All Historically Tracked Motivators Saw Year-Over-Year Increases Across the Board

QUESTION: What would motivate you to visit the Presidio? Please rate the following attributes by importance.

Base: All respondents, 1,200 responses.



Thank You

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