

# CITY OF SANTA BARBARA 2025 RENT SURVEY FOR THE SOUTH COAST

30 MAY 2025 - FINAL REPORT



Prepared for:



**City of Santa Barbara**

Prepared by:



**Robert D. Niehaus, Inc.**



**CITY OF SANTA BARBARA**  
**2025 RENT SURVEY FOR THE SOUTH COAST**  
**FINAL REPORT**

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## 1. INTRODUCTION

Every year the City of Santa Barbara (City) publishes data on rental housing listings across Santa Barbara County's southern coast (South Coast), including the cities and communities of Goleta, Isla Vista, Santa Barbara, Montecito, Summerland, and Carpinteria. For the 2025 analysis, the City outsourced this work to Robert D. Niehaus, Inc. (RDN), a local economic consulting firm specializing in rental housing market analysis. If you have any questions regarding this report, please email Myndi Hegeman, Housing Programs Specialist, at [mhegeman@SantaBarbaraCA.gov](mailto:mhegeman@SantaBarbaraCA.gov) or call (805) 564-5461 ext. 4578.

## 2. METHODOLOGY

RDN collected monthly prices for rental units across the South Coast, in accordance with Santa Barbara Municipal Code (SBMC) Sections 28.89 and 30.190, Tenant Displacement Assistance Ordinance, and direction from the City's Community Development Department.

### Overview

RDN compiled a list of rental housing listings in the South Coast area for the month of April 2025, removing duplicates and housing described as subleases, shared (rooms), restricted (set aside for students or seniors), subsidized, short-term, and/or furnished. The sources for these data include Craigslist, Zillow, and RDN's proprietary data feed that aggregates approximately one million rental listings nationally each week from various listing websites.

RDN classified rental listings into the four types of housing units collected in the City's previous studies: apartments, condominiums, duplexes/townhouses, and single-family houses. Next, RDN calculated median rents by area, housing type, and number of bedrooms (studio, one-bedroom, two-bedroom, three-bedroom, and units with four or more bedrooms). The median rent and sample size for each housing type and bedroom category are included in the tables of this report.

This survey provides a snapshot of the local private rental housing market as of April 2025 and tracks changes in the market over time. This report also includes a calculation of affordability and provides information used to calculate benefits under the City's Tenant Displacement Assistance Ordinance (TDAO).

### Geographic Area

The geographic area for this survey includes the South Coast of Santa Barbara County and is broken down into the following cities and communities: Goleta, Isla Vista, Santa Barbara, Montecito, Summerland, and Carpinteria.

### Data Sources

RDN searched for eligible rental listings from the following data sources:

1. April 2025 edition(s) of the Santa Barbara Independent
2. Listings posted in April (various dates) on Craigslist, Zillow, and RDN's proprietary rental data feed, which aggregates listings from multiple other websites

SBMC Sections 28.89.010 and 30.190.010 state, "...the median advertised rental rate shall be calculated annually based on the median of a representative sample of rental units advertised in a newspaper of general circulation for one Sunday during the month of April." However, given the availability of inexpensive and free online advertising platforms, few rental units are advertised in newspapers. During

the month of April, the Santa Barbara Independent accounted for a total of zero listings. Rental listing platforms such as Zillow and the “apartments / housing for rent” section of Craigslist are the most popular sources for local rental listings. This year’s sample includes 98 rental listings from Craigslist, 132 listings from Zillow, and 207 listings sourced from other listing websites, for an overall total of 437 unique rental units. This total reflects only those listings that were advertised in April 2025 and met the City’s other survey criteria. For comparison, RDN observed 565 unique listings in April 2024 and 355 unique listings in April 2023.

### **Housing Criteria**

The survey evaluates prices for four housing types, including apartments, condominiums (condos), duplexes/townhouses (duplex/TH), and single-family residences (houses). These categories are further classified by the number of bedrooms, including studios (no bedrooms), one-bedroom units, two-bedroom units, three-bedroom units, and units with four or more bedrooms. Any listing identified as a “cottage” is reported as a single-family house.

Listings for subleases, shared housing (e.g., a room in a house), short-term/vacation rentals, and furnished units were excluded from the sample. Other non-market rate housing was also excluded, including affordable housing (e.g., Section 8) and units that are only rented to students or seniors.

### **Duplicate Listings**

RDN reviewed the data sample to identify and resolve duplicate listings per the City’s instructions. Depending on the specific scenario, duplicate listings were either removed from the sample or averaged together using the following methodology:

1. Listings with the same address, housing type, and number of bedrooms that appeared multiple times during the data collection period with no change to the rent were counted as one observation (i.e., the first instance was included in the sample and all other instances were removed).
2. Listings with the same address, housing type, and number of bedrooms that appeared multiple times on different days with different rents were counted as unique observations, with one instance for each distinct listing date and rent price (i.e., the first instance was included in the sample, as well as any later instances with different listing dates and rent prices; any instances that included the same rent price as one of the previously seen instances were removed from the sample).
3. Listings that appeared the same day and had the same address, housing type, and number of bedrooms were aggregated into one observation (i.e., complexes may have several floorplans that vary in price but have the same housing type and number of bedrooms). In these instances, the observations were assigned the average rent of the grouped listings.

### **Key Statistics**

This report presents the median rent and number of listings (sample size) by area, housing type, and number of bedrooms. For a given range of values, the median is the middle value when the sample size is odd or the average of the two middle values when the sample size is even. These key statistics are reported in the next section.

### 3. RESULTS

Table 3-1 presents median rents in the South Coast region by housing type and number of bedrooms over the last decade, including the results of the 2025 survey. Note that the bottom section of the table also presents the number of listings (sample sizes) that were surveyed each year.

**Table 3-1: Median Rent by Bedroom and Housing Type, South Coast Region, 2016-2025**

	2016	2017	2018	2019*	2020	2021	2022	2023	2024	2025
<b>ALL HOUSING TYPES</b>										
0 BR	\$1,438	\$1,495	\$1,553	\$1,520	\$1,638	\$1,695	\$2,000	\$2,100	\$2,225	\$2,275
1 BR	\$1,695	\$1,750	\$2,253	\$1,875	\$1,925	\$2,000	\$2,624	\$2,881	\$2,750	\$2,890
2 BR	\$2,500	\$2,550	\$2,701	\$2,695	\$2,950	\$2,800	\$3,993	\$4,400	\$4,075	\$3,941
3 BR	\$3,300	\$3,700	\$3,669	\$3,900	\$4,473	\$3,993	\$5,425	\$5,769	\$5,693	\$5,995
4+ BR	\$4,195	\$5,000	\$3,590	\$5,100	\$6,800	\$5,000	\$8,000	\$6,500	\$7,500	\$7,700
<b>APARTMENT</b>										
0 BR	\$1,438	\$1,495	\$1,456	\$1,500	\$1,638	\$1,695	\$2,000	\$2,100	\$2,225	\$2,275
1 BR	\$1,695	\$1,700	\$1,748	\$1,863	\$1,925	\$1,984	\$2,554	\$2,750	\$2,700	\$2,841
2 BR	\$2,325	\$2,450	\$2,525	\$2,563	\$2,800	\$2,748	\$3,687	\$3,898	\$3,997	\$3,850
3 BR	\$3,040	\$3,140	\$3,838	\$3,425	\$4,900	\$3,950	\$4,200	\$4,795	\$5,600	\$5,500
4+ BR	\$3,138	\$4,500	\$3,290	\$4,698	\$7,650	\$4,750	\$6,600	\$5,900	\$7,000	\$8,500
<b>CONDO</b>										
0 BR	NSD	NSD	\$3,195	\$2,800	NSD	NSD	NSD	NSD	NSD	NSD
1 BR	\$2,500	\$2,375	\$2,250	\$2,150	\$2,525	\$2,275	\$2,950	\$3,450	\$3,350	\$3,275
2 BR	\$2,700	\$2,700	\$2,550	\$2,850	\$3,000	\$3,075	\$4,450	\$5,850	\$4,550	\$3,900
3 BR	\$2,987	\$3,400	\$3,500	\$3,150	\$3,675	\$3,750	\$4,850	\$5,420	\$4,700	\$6,900
4+ BR	\$4,000	NSD	\$3,590	\$3,700	\$5,000	\$3,800	NSD	\$5,950	NSD	NSD
<b>DUPLEX/TH</b>										
0 BR	NSD	NSD	\$1,411	NSD	NSD	NSD	NSD	NSD	NSD	NSD
1 BR	NSD	\$2,250	\$2,314	\$1,850	\$1,825	\$2,095	\$2,674	\$3,000	\$3,225	\$2,825
2 BR	NSD	\$2,700	\$2,853	\$2,823	\$3,200	\$2,835	\$3,725	\$4,500	\$3,295	\$3,985
3 BR	NSD	\$3,150	\$3,200	\$4,099	\$5,500	\$3,600	\$5,200	\$4,990	\$5,150	\$4,995
4+ BR	NSD	NSD	NSD	NSD	\$10,000	\$4,500	\$11,500	\$6,800	NSD	NSD
<b>HOUSE</b>										
0 BR	NSD	NSD	\$1,650	\$1,520	NSD	NSD	NSD	NSD	NSD	NSD
1 BR	\$2,500	\$2,450	\$2,256	\$1,750	\$1,873	\$2,025	\$2,650	\$3,100	\$2,850	\$3,320
2 BR	\$2,900	\$3,000	\$3,425	\$3,200	\$3,195	\$2,923	\$4,850	\$4,995	\$4,950	\$4,875
3 BR	\$3,600	\$4,000	\$4,869	\$3,950	\$4,425	\$4,250	\$6,000	\$6,450	\$5,900	\$6,500
4+ BR	\$4,450	\$5,175	\$5,375	\$5,625	\$6,800	\$5,975	\$7,725	\$6,625	\$8,000	\$7,700
<b>NUMBER OF LISTINGS</b>										
Apartment	493	646	457	318	172	459	159	182	414	294
Condo	38	50	73	37	25	30	13	24	20	20
Duplex/TH	0	27	62	39	18	74	61	42	19	27
House	206	216	271	117	80	101	88	107	112	96
ALL	737	939	863	511	295	664	321	355	565	437

Notes: \*Data for 2019 collected in July; all other years' data collected in April. NSD=No Sample Data; TH=Townhouse.



Table 3-2 through Table 3-5 present, for each housing type, a breakdown of the 2025 median rent and number of listings/observations (Obs), or sample size, by area and number of bedrooms.

**Table 3-2: Median Rent and Sample Size, by Area and Number of Bedrooms, Apartments**

APARTMENT	0 Bedroom		1 Bedroom		2 Bedroom		3 Bedroom		4+ Bedroom	
City	Median Rent	Obs	Median Rent	Obs	Median Rent	Obs	Median Rent	Obs	Median Rent	Obs
Santa Barbara	\$2,350	35	\$2,883	78	\$3,836	78	\$4,925	12	\$5,998	2
Goleta	\$2,038	4	\$2,695	21	\$4,183	15	\$5,500	10	\$14,010	2
Isla Vista	NSD	0	\$2,500	9	\$8,000	3	\$10,625	2	\$8,460	2
Carpinteria	\$2,200	1	\$2,895	5	\$3,538	6	\$4,450	1	NSD	0
Montecito	\$2,350	2	\$4,250	1	NSD	0	NSD	0	NSD	0
Summerland	\$1,550	1	\$2,595	1	\$3,300	3	NSD	0	NSD	0
<b>South Coast Total</b>	<b>\$2,275</b>	<b>43</b>	<b>\$2,841</b>	<b>115</b>	<b>\$3,850</b>	<b>105</b>	<b>\$5,500</b>	<b>25</b>	<b>\$8,500</b>	<b>6</b>

Note: NSD = No Sample Data.

**Table 3-3: Median Rent and Sample Size, by Area and Number of Bedrooms, Condos**

CONDO	0 Bedroom		1 Bedroom		2 Bedroom		3 Bedroom		4+ Bedroom	
City	Median Rent	Obs	Median Rent	Obs	Median Rent	Obs	Median Rent	Obs	Median Rent	Obs
Santa Barbara	NSD	0	\$3,875	4	\$3,900	7	\$5,900	1	NSD	0
Goleta	NSD	0	\$2,587	4	\$3,400	1	NSD	0	NSD	0
Isla Vista	NSD	0	NSD	0	NSD	0	NSD	0	NSD	0
Carpinteria	NSD	0	NSD	0	\$5,500	1	\$6,900	1	NSD	0
Montecito	NSD	0	NSD	0	NSD	0	NSD	0	NSD	0
Summerland	NSD	0	NSD	0	NSD	0	\$8,950	1	NSD	0
<b>South Coast Total</b>	<b>NSD</b>	<b>0</b>	<b>\$3,275</b>	<b>8</b>	<b>\$3,900</b>	<b>9</b>	<b>\$6,900</b>	<b>3</b>	<b>NSD</b>	<b>0</b>

Note: NSD = No Sample Data.

**Table 3-4: Median Rent and Sample Size, by Area and Number of Bedrooms, Duplexes/Townhomes**

DUPLEX/TH	0 Bedroom		1 Bedroom		2 Bedroom		3 Bedroom		4+ Bedroom	
City	Median Rent	Obs	Median Rent	Obs	Median Rent	Obs	Median Rent	Obs	Median Rent	Obs
Santa Barbara	NSD	0	\$2,825	4	\$3,950	11	\$5,325	2	NSD	0
Goleta	NSD	0	NSD	0	\$4,463	2	\$5,248	4	NSD	0
Isla Vista	NSD	0	NSD	0	NSD	0	NSD	0	NSD	0
Carpinteria	NSD	0	NSD	0	\$4,060	2	\$4,875	1	NSD	0
Montecito	NSD	0	NSD	0	\$8,748	1	NSD	0	NSD	0
Summerland	NSD	0	NSD	0	NSD	0	NSD	0	NSD	0
<b>South Coast Total</b>	<b>NSD</b>	<b>0</b>	<b>\$2,825</b>	<b>4</b>	<b>\$3,985</b>	<b>16</b>	<b>\$4,995</b>	<b>7</b>	<b>NSD</b>	<b>0</b>

Note: NSD = No Sample Data.

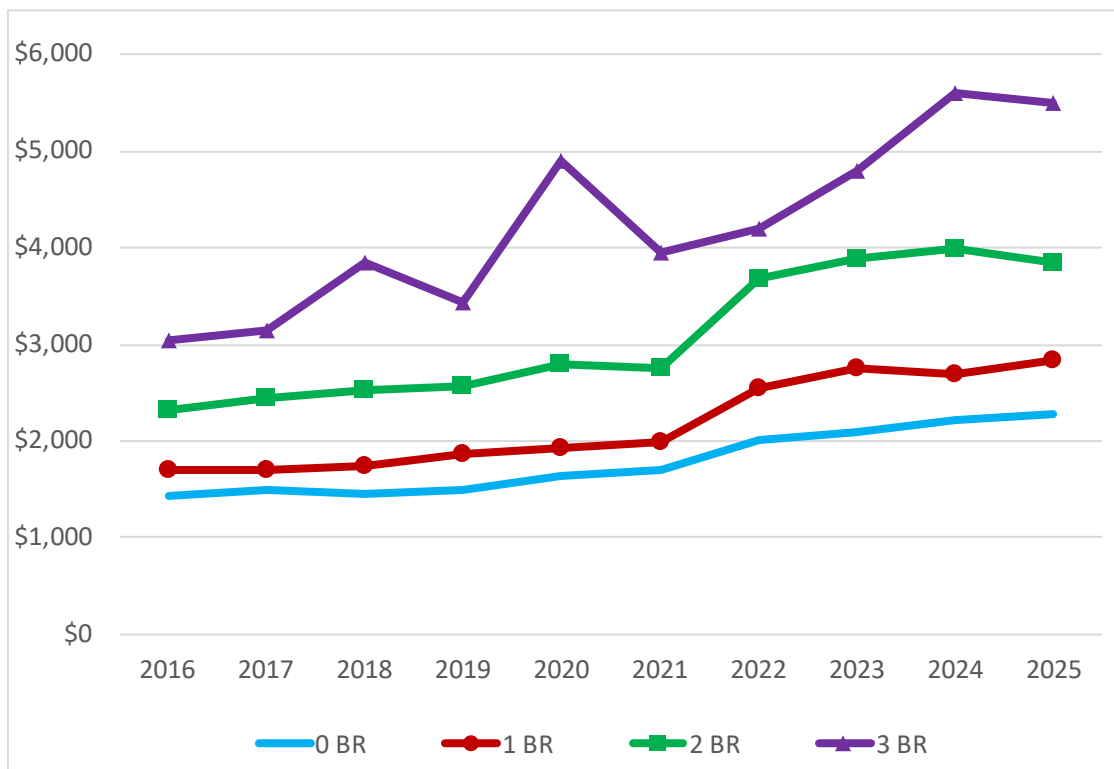
**Table 3-5: Median Rent and Sample Size, by Area and Number of Bedrooms, Single-Family Houses**

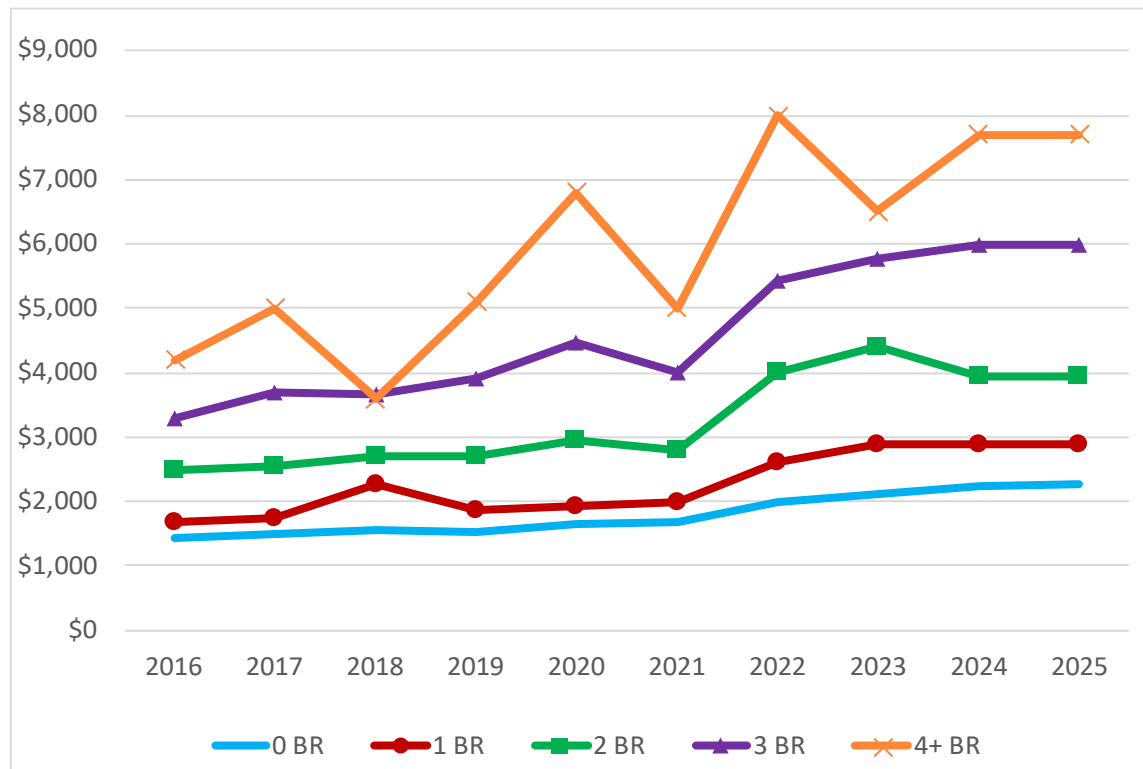
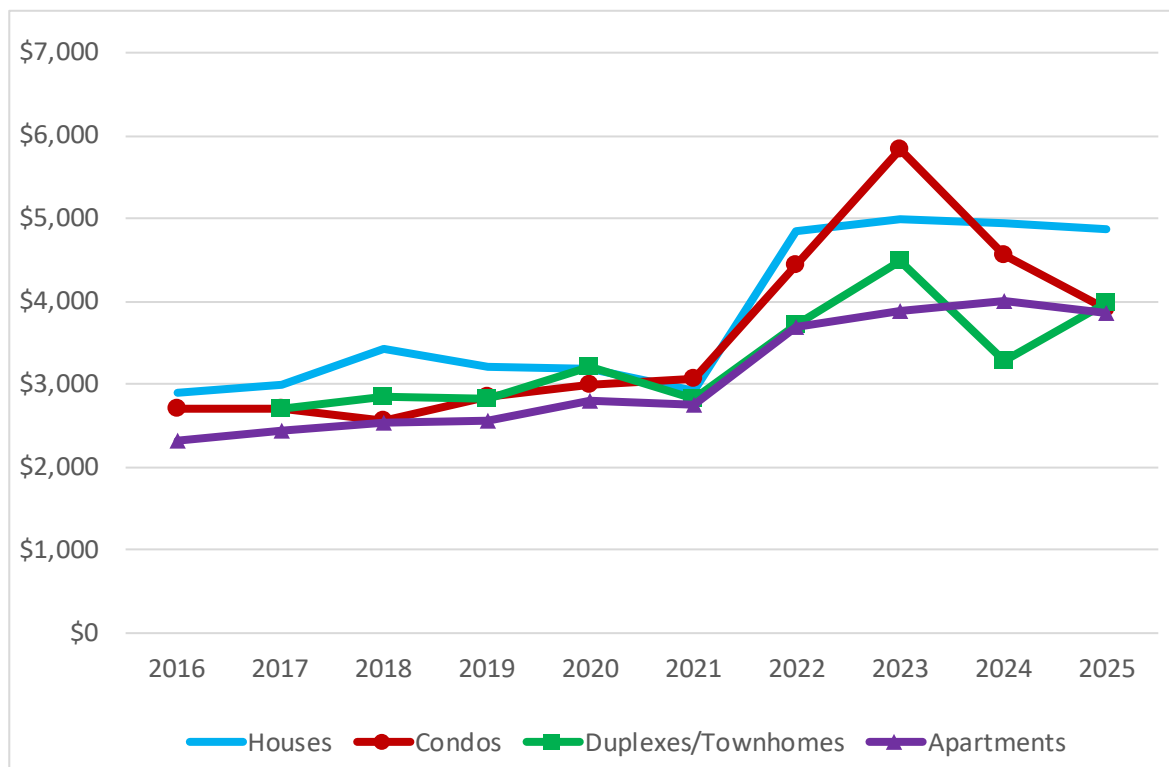
HOUSE	0 Bedroom		1 Bedroom		2 Bedroom		3 Bedroom		4+ Bedroom	
City	Median Rent	Obs	Median Rent	Obs	Median Rent	Obs	Median Rent	Obs	Median Rent	Obs
Santa Barbara	NSD	0	\$2,998	4	\$4,675	16	\$6,725	34	\$7,900	13
Goleta	NSD	0	NSD	0	NSD	0	\$5,500	3	\$6,208	6
Isla Vista	NSD	0	NSD	0	NSD	0	\$14,000	1	NSD	0
Carpinteria	NSD	0	NSD	0	\$6,000	1	\$5,000	7	NSD	0
Montecito	NSD	0	\$3,700	3	\$5,100	2	\$14,000	1	\$13,650	2
Summerland	NSD	0	\$3,295	1	\$8,000	1	NSD	0	\$9,750	1
<b>South Coast Total</b>	NSD	<b>0</b>	<b>\$3,320</b>	<b>8</b>	<b>\$4,875</b>	<b>20</b>	<b>\$6,500</b>	<b>46</b>	<b>\$7,700</b>	<b>22</b>

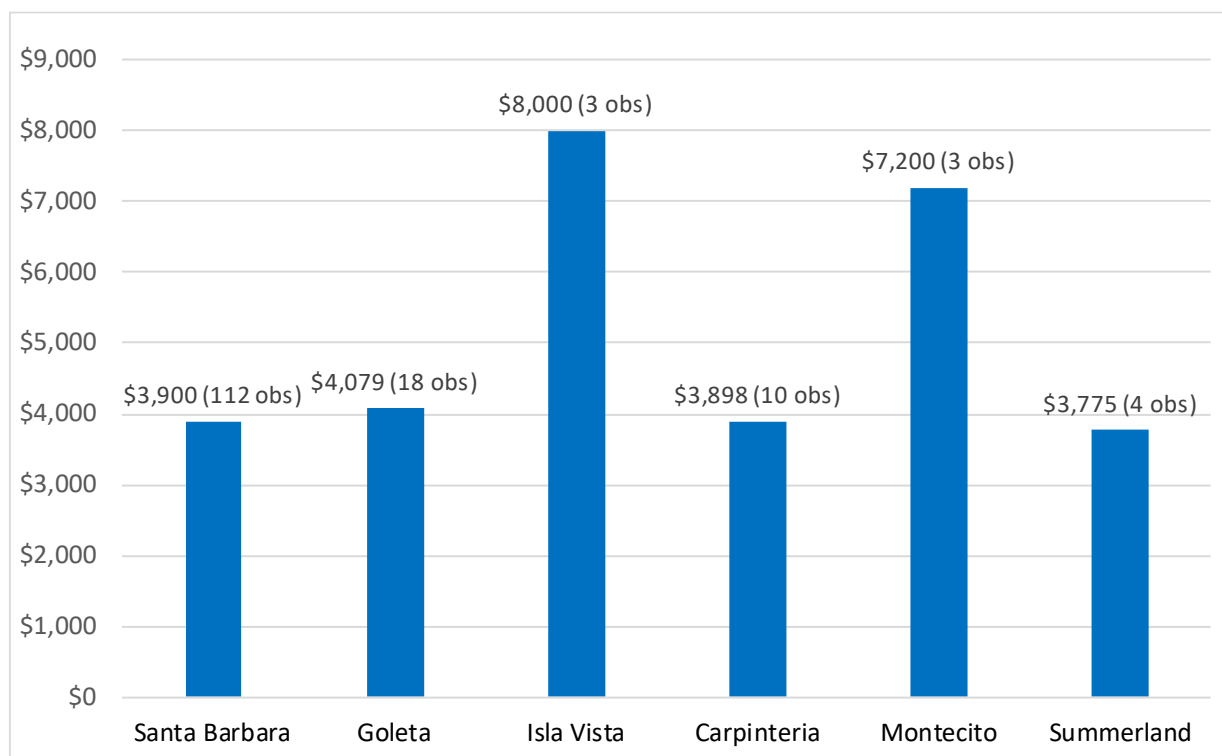
Note: NSD = No Sample Data.

Figure 3-1 through Figure 3-3 chart rental price trends in the South Coast region over the last decade for select housing types and bedroom categories. Figure 3-1 charts the median rent for studios, one-bedroom, two-bedroom, and three-bedroom apartments. Figure 3-2 charts the overall median rent by number of bedrooms for all housing types combined. Figure 3-3 charts the median rent for two-bedroom units broken out by housing type. Lastly, Figure 3-4 plots the two-bedroom median rent in 2025 across all housing types, by area.

**Figure 3-1: South Coast Median Rent by Number of Bedrooms, Apartments, 2016-2025**



**Figure 3-2: South Coast Median Rent by Number of Bedrooms, All Housing Types, 2016-2025****Figure 3-3: South Coast Median Rent for Two-Bedroom Units, by Housing Type, 2016-2025**

**Figure 3-4: Median Rent for Two-Bedroom Units of All Housing Types, by Area, 2025**

Note: "obs" refers to the number of observations (rental listings) in the sample.

## 4. AFFORDABILITY ANALYSIS

This affordability analysis considers the 2025 median rent prices for apartments in the City of Santa Barbara relative to tenant income. Table 4-1 displays the level of income needed for median rent to represent 30 percent of tenant income. Table 4-2 and Table 4-3 display 2025 median household incomes and 2025 minimum wage household incomes, respectively, based on household sizes of one person for studios, two people for one-bedroom apartments, three people for two-bedroom apartments, four people for three-bedroom apartments, and five people for apartments with four or more bedrooms. These tables include the percentage of median or minimum wage household income that would be required for median rent prices to represent 30 percent of tenant income.

**Table 4-1: Hourly and Annual Income Needed to Afford Median Rent**

Apartment Size	Median Rent	Hourly Income Needed <sup>1</sup>	Annual Income Needed <sup>1</sup>
Studio	\$2,350	\$45.19	\$94,000
1 Bedroom	\$2,883	\$55.43	\$115,300
2 Bedroom	\$3,836	\$73.77	\$153,450
3 Bedroom	\$4,925	\$94.71	\$197,000
4+ Bedrooms	\$5,998	\$115.34	\$239,900

**Table 4-2: Median Income Relative to Income Needed to Afford Median Rent**

Apartment Size	Household Size	2025 Median Household Income <sup>2</sup>	% of Median Household Income Needed <sup>1</sup>
Studio	1 Person	\$79,310	119%
1 Bedroom	2 People	\$90,640	127%
2 Bedroom	3 People	\$101,970	150%
3 Bedroom	4 People	\$113,300	174%
4+ Bedrooms	5 People	\$122,364	196%

**Table 4-3: Minimum Wage Income Relative to Income Needed to Afford Median Rent**

Apartment Size	Household Size	2025 Minimum Wage Household Income <sup>3</sup>	% of Minimum Wage Household Income Needed <sup>1</sup>
Studio	1 Person	\$34,320	274%
1 Bedroom	2 People	\$68,640	168%
2 Bedroom	3 People	\$102,960	149%
3 Bedroom	4 People	\$137,280	144%
4+ Bedrooms	5 People	\$171,600	140%

Notes: [1] Minimum income required for household to spend at most 30% of income on rent.

[2] Median Household Income by Household Size is derived from the [FY2025 Median Family Income \(MFI\) for Santa Barbara-Santa Maria MSA published by HUD](#) (\$113,300) assuming the following adjustment factors: 70% of MFI for 1 person, 80% of MFI for two persons, 90% of MFI for three persons, 100% of MFI for four persons, and 108% of MFI for five persons.

[3] Assumes current (May 2025) state minimum wage of \$16.50 per hour for 2,080 hours for each person in the household.

## 5. TENANT DISPLACEMENT ASSISTANCE ORDINANCE

Figure 5-1 presents the median rent by housing type and number of bedrooms in the City of Santa Barbara as derived from the rental survey. These rent prices are presented for use under the Tenant Displacement Assistance Ordinance (TDAO) of the City of Santa Barbara Municipal Code (Chapters 28.89 and 30.190). Note that some of the median rent estimates presented below are based on small sample sizes and are thus prone to large sampling errors. Please refer to Table 3-2 through Table 3-5 for the number of available units located in the City of Santa Barbara in each housing type/bedroom category.

**Figure 5-1: Median Rent in the City of Santa Barbara  
for use under the Tenant Displacement Assistance Ordinance**

<b>City of Santa Barbara</b> <b>Tenant Displacement Assistance Ordinance (TDAO)</b> <b>Median Rents as of April 2025</b> By Housing Type and Unit Size					
	<b>Studio</b>	<b>1 BR</b>	<b>2 BR</b>	<b>3 BR</b>	<b>4+ BR</b>
<b>Apartments</b>	\$2,350	\$2,883	\$3,836	\$4,925	\$5,998
<b>Duplexes</b>	NSD	\$2,825	\$3,950	\$5,325	NSD
<b>Condos</b>	NSD	\$3,875	\$3,900	\$5,900	NSD
<b>Houses</b>	NSD	\$2,998	\$4,675	\$6,725	\$7,900

Notes: BR = Bedroom; NSD = No Sample Data.