

# The Economic Impact of Travel

Santa Ana

2024 Preliminary Estimates

April, 2025

**PREPARED FOR**  
Travel Santa Ana

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# The Economic Impact of Travel in Santa Ana, California

2024 Preliminary Estimates

Travel Santa Ana

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**PRIMARY RESEARCH CONDUCTED BY**

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# Table of Contents

- DIRECT TRAVEL IMPACTS .....6**
  - SUMMARY, 2024P..... 6
  - HISTORICAL TREND TABLES ..... 7
    - Direct Impact Summary* ..... 7
    - Direct Spending Summary* ..... 8
    - Direct Impact Detail* ..... 9
- DIRECT SPENDING .....10**
  - VISITOR SPENDING BY COMMODITY PURCHASED ..... 10
  - VISITOR SPENDING BY ACCOMMODATION TYPE ..... 10
- DIRECT EMPLOYMENT ..... 11**
  - TRAVEL INDUSTRY EMPLOYMENT..... 11
- OVERNIGHT VISITOR VOLUME.....12**
  - VISITOR VOLUME ..... 12
  - VISITOR NIGHTS AND TRIPS ..... 12
- OVERNIGHT VISITOR DETAILS.....13**
  - TAXABLE LODGING SALES ..... 13
  - OVERNIGHT TRIP DETAILS..... 13
- GLOSSARY.....14**
- METHODOLOGY .....15**



**Santa Ana, CA**

**2024p**



# Direct Travel Impacts

## Summary, 2024p

Santa Ana, California, offers visitors a vibrant mix of culture, history, and urban energy in the heart of Orange County. The city is home to the Bowers Museum, a renowned cultural institution, and the lively Santa Ana Artists Village, which showcases galleries, performances, and local eateries. In 2024, overnight visitor volume was up 3.6%, which ultimately contributed to a 4.8% increase in visitor spending compared to the previous year.

- **Overnight Visitor volume** (person-trips) increased 3.6% from 875,000 visitors in 2023 to 906,700 visitors in 2024.
- **Visitor spending** was \$394.2 million in 2024, a 4.8% increase compared to the previous year.
- **Direct earnings** (wages, benefits, and proprietor income generated by travel) grew 15.6%, from \$128.4 million in 2023 to \$148.5 million in 2024.
- **Direct travel generated employment** gained approximately 250 jobs in 2024, an 8.8% increase compared to the previous year.
- **Local tax revenue** generated by visitor spending totaled \$13.5 million in 2024, a 3.0% increase compared to 2023. In 2024, local tax revenue generated approximately \$170 per local household.

In 2024, **visitors spent \$394.2 million, a 4.8% increase** compared to the previous year.

**Note:** This report describes the travel impacts within Santa Ana city limits. These estimates are subject to revision if more comprehensive data becomes available. All economic impacts are reported as direct impacts. Expenditures made by visitors outside of city limits are classified as "Day Travel". Due to a large, delayed payment of hotel visitor tax and tourism marketing district assessments from 2022 that were initially recorded in 2023, the 2023 economic impact was overstated in the 2023 report published in 2024. Revised taxable lodging sales for 2022 and 2023 have been applied in this report based on the revised hotel visitor tax revenues.

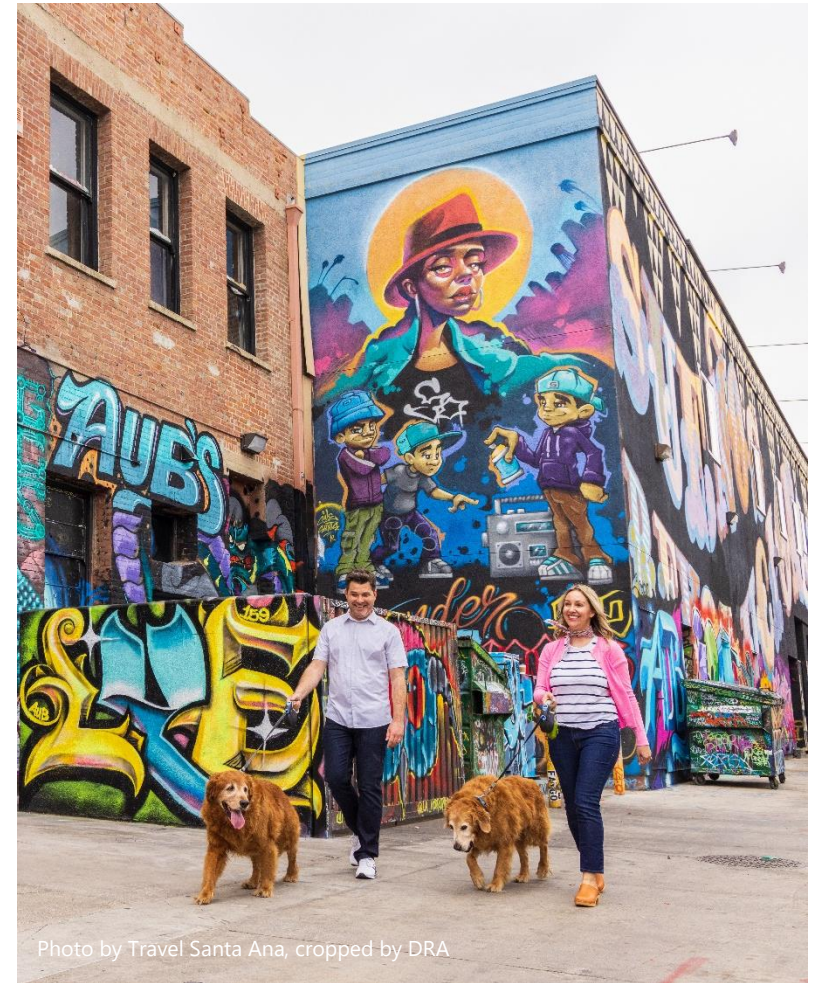


Photo by Travel Santa Ana, cropped by DRA

# Direct Travel Impacts

## Historical Trend Tables

### Direct Impact Summary

	2018	2019	2020	2021	2022	2023	2024	% Change		CAGR*
								23-24	19-24	18-24
Spending (\$Millions)										
Visitor	402.2	430.7	167.2	290.9	420.7	376.2	394.2	4.8%	-8.5%	-0.3%
Total	402.2	430.7	167.2	290.9	420.7	376.2	394.2	4.8%	-8.5%	-0.3%
Earnings (\$Millions)										
Earnings	137.0	148.5	86.9	92.7	117.2	128.4	148.5	15.6%	0.0%	1.3%
Employment (Jobs)										
Employment	3,350	3,530	2,080	2,140	2,750	2,850	3,100	8.8%	-12.2%	-1.3%
Tax Revenue (\$Millions)										
Local	11.4	12.1	5.0	8.9	15.4	13.1	13.5	3.0%	12.1%	3.0%
State	13.3	14.5	6.4	11.0	13.8	13.1	14.0	7.1%	-3.9%	0.8%
Total	24.7	26.6	11.4	20.0	29.2	26.2	27.5	5.0%	3.4%	1.8%

**Note:** Employment figures represent annual average jobs and are rounded to the nearest 10. The economic estimates for 2022 and 2023 have been updated to reflect revised Hotel Visitor Tax and Tourism Marketing District assessment revenues.

\*CAGR stands for Compound Annual Growth Rate and shows the average rate of growth each year over a certain period.

# Direct Travel Impacts

## Historical Trend Tables

### Direct Spending Summary

	2018	2019	2020	2021	2022	2023	2024	% Change		CAGR*
								23-24	19-24	18-24
Spending (\$Millions)										
Visitor	402.2	430.7	167.2	290.9	420.7	376.2	394.2	4.8%	-8.5%	-0.3%
Total	402.2	430.7	167.2	290.9	420.7	376.2	394.2	4.8%	-8.5%	-0.3%
Visitor Spending by Type of Traveler Accommodation (\$Millions)										
Hotel, Motel	201.5	217.0	102.1	153.1	264.6	220.4	234.3	6.3%	8.0%	2.5%
Private Home (VFR)	64.3	69.7	31.4	69.4	72.6	75.2	76.4	1.6%	9.7%	2.9%
Seasonal Home (2nd Home)	1.5	1.1	1.5	1.2	2.6	2.7	2.9	6.6%	151.0%	11.5%
Day Travel	134.9	142.9	32.1	67.2	81.0	77.9	80.6	3.5%	-43.6%	-8.2%
Total	402.2	430.7	167.2	290.9	420.7	376.2	394.2	4.8%	-8.5%	-0.3%
Visitor Spending by Commodity Purchased (\$Millions)										
Accommodations	93.1	98.1	40.9	60.1	113.7	93.7	96.1	2.5%	-2.1%	0.5%
Food Service	98.6	107.0	44.0	79.3	105.0	99.9	109.2	9.3%	2.0%	1.7%
Food Stores	14.9	15.6	6.5	13.4	16.2	16.0	16.6	3.8%	6.3%	1.8%
Arts, Ent. & Rec.	96.4	101.8	35.4	62.2	79.8	74.6	78.7	5.6%	-22.7%	-3.3%
Retail Sales	34.1	38.0	15.6	28.5	37.6	33.7	34.8	3.1%	-8.6%	0.3%
Local Tran. & Gas	65.2	70.1	24.8	47.5	68.4	58.3	58.9	0.9%	-16.0%	-1.7%
Total	402.2	430.7	167.2	290.9	420.7	376.2	394.2	4.8%	-8.5%	-0.3%

\*CAGR stands for Compound Annual Growth Rate and shows the average rate of growth each year over a certain period.

For more information, see Glossary on page 14





# Direct Travel Impacts

## Historical Trend Tables

### Direct Impact Detail

	2018	2019	2020	2021	2022	2023	2024	% Change		CAGR**
								23-24	19-24	18-24
<b>Earnings (\$Millions)</b>										
Accom. & Food Serv.	91.1	99.0	63.5	64.4	84.8	92.9	110.4	18.8%	11.5%	3.3%
Arts, Ent. & Rec.	33.2	35.5	14.4	15.1	18.7	20.5	22.5	10.0%	-36.6%	-6.3%
Retail*	7.8	8.3	7.0	11.1	10.9	12.8	13.2	3.6%	58.9%	9.3%
Ground Trans. & Other Travel	5.0	5.6	2.0	2.1	2.8	2.3	2.4	1.9%	-58.1%	-11.7%
<b>Total</b>	<b>137.0</b>	<b>148.5</b>	<b>86.9</b>	<b>92.7</b>	<b>117.2</b>	<b>128.4</b>	<b>148.5</b>	<b>15.6%</b>	<b>0.0%</b>	<b>1.3%</b>
<b>Employment (Jobs)</b>										
Accom. & Food Serv.	2,200	2,320	1,490	1,530	1,870	1,910	2,120	11.0%	-8.6%	-0.6%
Arts, Ent. & Rec.	840	890	350	360	560	610	640	4.9%	-28.1%	-4.5%
Retail*	210	220	170	180	240	260	270	3.8%	22.7%	3.8%
Ground Trans. & Other Travel	90	110	70	70	90	80	80	0.0%	-27.3%	-2.9%
<b>Total</b>	<b>3,350</b>	<b>3,530</b>	<b>2,080</b>	<b>2,140</b>	<b>2,750</b>	<b>2,850</b>	<b>3,100</b>	<b>8.8%</b>	<b>-12.2%</b>	<b>-1.3%</b>
<b>Tax Revenue (\$Millions)</b>										
City	11.1	11.7	4.9	8.6	15.0	12.8	13.2	2.9%	12.1%	2.9%
County	0.3	0.3	0.1	0.3	0.4	0.4	0.4	7.2%	13.6%	3.7%
State	13.3	14.5	6.4	11.0	13.8	13.1	14.0	7.1%	-3.9%	0.8%
<b>Total</b>	<b>24.7</b>	<b>26.6</b>	<b>11.4</b>	<b>20.0</b>	<b>29.2</b>	<b>26.2</b>	<b>27.5</b>	<b>5.0%</b>	<b>3.4%</b>	<b>1.8%</b>

**Note:** Employment figures represent annual average jobs and are rounded to the nearest 10. City and County tax receipts include city and county sales taxes, state sales tax distributed to local governments, hotel visitor tax, tourism marketing district assessments, property tax, and sales tax payments attributable to the travel industry income of employees and businesses. State sales tax includes lodging taxes, sales taxes and motor fuel taxes paid by visitors. State tax also includes income and sales tax payments attributable to the travel industry income of businesses and employees.

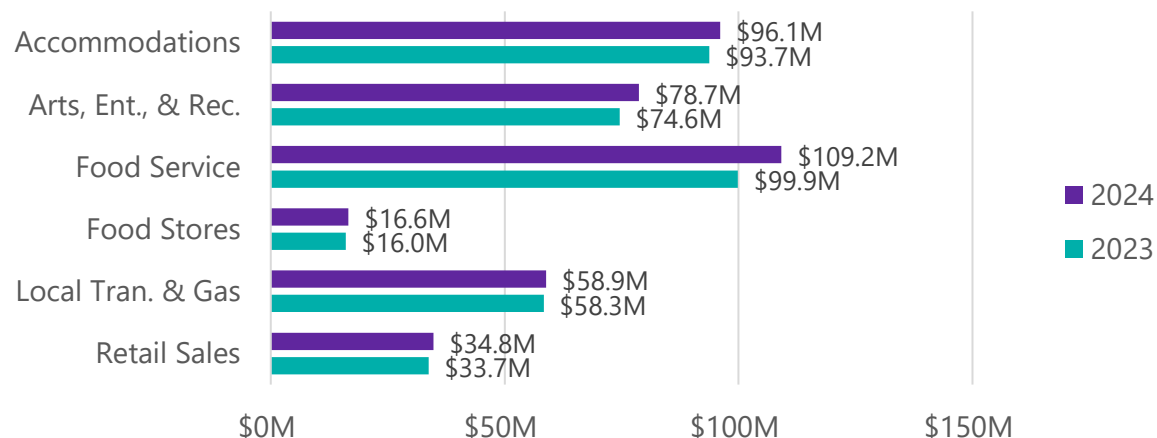
\*Retail includes gasoline station employment and earnings.

\*\*CAGR stands for Compound Annual Growth Rate and shows the average rate of growth each year over a certain period.

For more information, see Glossary on page 14.

# Direct Spending

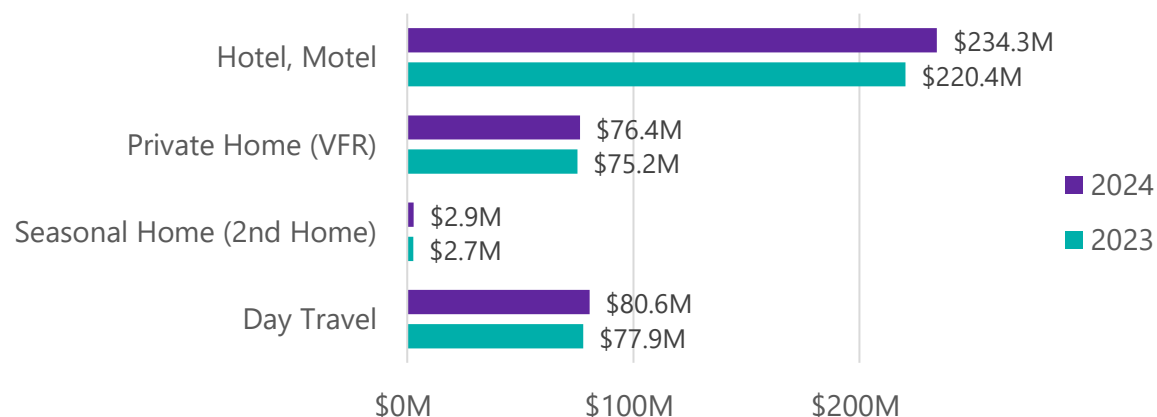
## Visitor Spending by Commodity Purchased



Visitors spent \$96.1 million on accommodations in 2023, a **\$2.4 million or 2.5% increase** compared to the previous year.

Sources: Dean Runyan Associates, OmniTrak Group, U.S. Energy Information Administration, U.S. Bureau of Transportation Statistics

## Visitor Spending by Accommodation Type

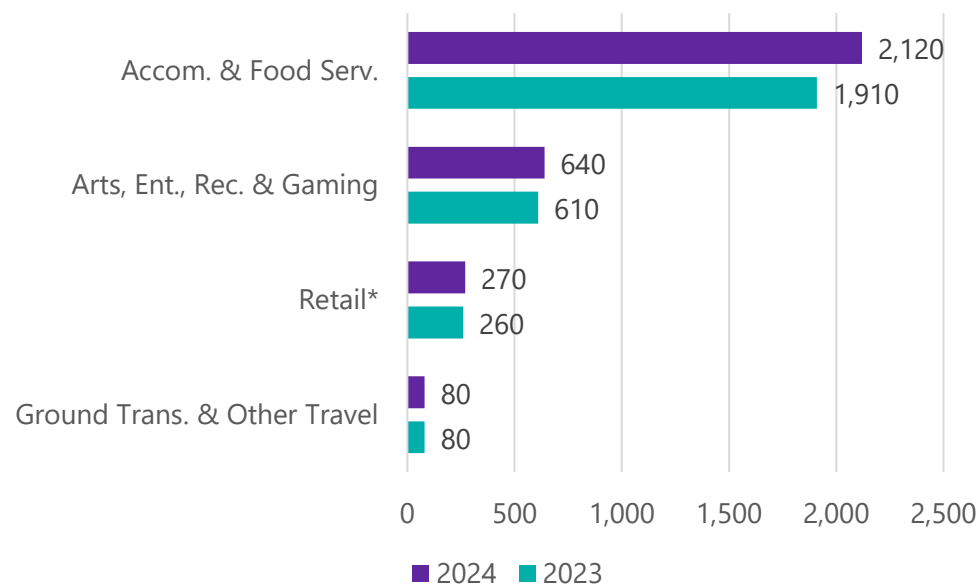


Visitors who stayed in a hotel or motel contributed \$234.3 million of visitor spending, a **\$13.9 million or 6.3% increase** compared to the previous year.

Sources: Dean Runyan Associates, OmniTrak Group, Smith Travel Research, U.S. Census Bureau

# Direct Employment

## Travel Industry Employment

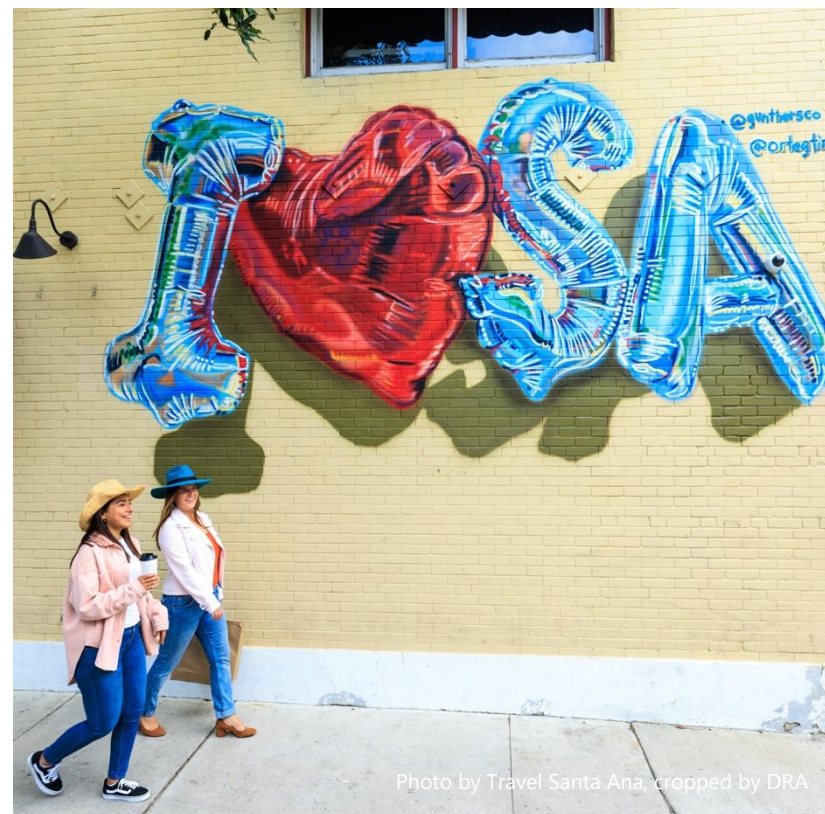


**Sources:** Dean Runyan Associates, U.S. Bureau of Labor Statistics, U.S. Bureau of Economic Analysis

**Note:** Employment figures represent annual average jobs and are rounded to the nearest 10.

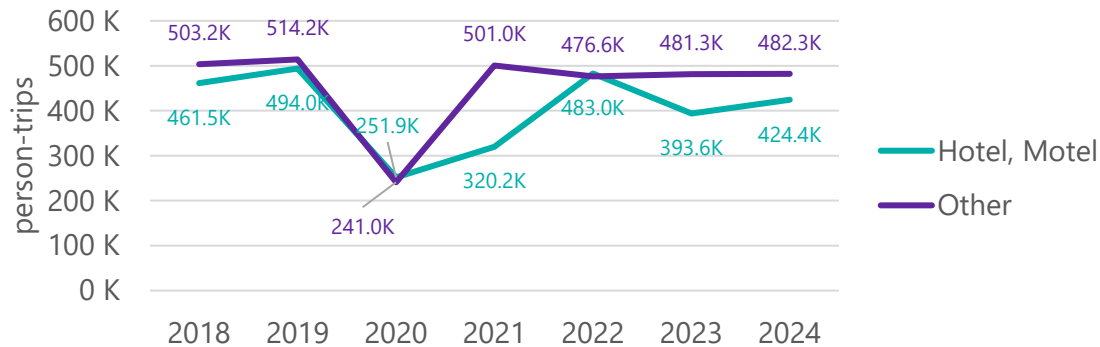
\*Retail includes gasoline station employment.

Overall, the travel industry **gained approximately 250 jobs in 2024, a 8.8% increase** compared to the previous year.



# Overnight Visitor Volume

## Visitor Volume



Approximately 424.4K visitors stayed in a hotel or motel in 2024, a **7.8% increase** compared to the previous year.

**Sources:** City of Santa Ana, U.S. Census Bureau, Smith Travel Research, OmniTrak Group, Dean Runyan Associates

**Note:** DRA estimates overnight visitor volume by cross-referencing visitor surveys and lodging data. Because of this, the volume estimates reported here may not align with estimates that rely solely on visitor surveys. Visitor Spending is a more reliable metric to Visitor Volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys

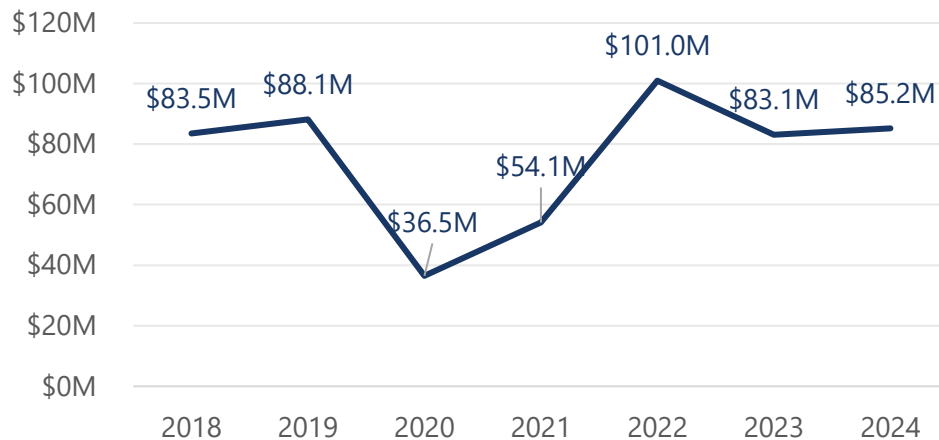
## Visitor Nights and Trips

	Person			Party		
	2022	2023	2024	2022	2023	2024
<b>Nights</b>						
Hotel, Motel, STVR	1,430,800	1,166,100	1,257,100	485,800	395,900	426,900
Private Home (VFR)	1,701,300	1,718,800	1,720,200	787,600	795,700	796,400
Other Overnight	51,000	51,000	53,300	16,500	16,500	17,200
<b>Total</b>	<b>3,183,100</b>	<b>2,935,900</b>	<b>3,030,600</b>	<b>1,289,900</b>	<b>1,208,100</b>	<b>1,240,500</b>
<b>Trips</b>						
Hotel, Motel, STVR	483,000	393,600	424,400	164,000	133,700	144,100
Private Home (VFR)	464,000	468,700	469,100	214,800	217,000	217,200
Other Overnight	12,600	12,600	13,200	4,100	4,100	4,300
<b>Total</b>	<b>959,600</b>	<b>875,000</b>	<b>906,700</b>	<b>382,900</b>	<b>354,800</b>	<b>365,500</b>

**Note:** Figures are rounded to the nearest hundred. Day travel volume estimates are not included because of data limitations.

# Overnight Visitor Details

## Taxable Lodging Sales



Taxable lodging sales totaled \$85.2 million in 2024, a **\$2.1 million or 2.6% increase** compared to the previous year.

**Sources:** City of Santa Ana, Dean Runyan Associates

**Note:** 2023 taxable lodging sales were revised downward to reflect the reassignment of a large back payment to the 2022 calendar year. The original estimates reported an 11% increase in 2023, which is now an 18% decline in 2023 post-revision.

## Overnight Trip Details

	Spending per Person		Spending per Party		Party Size	Length of Stay
	Day	Trip	Day	Trip		
Hotel, Motel	\$186	\$552	\$549	\$1,626	2.9	3.0
Private Home (VFR)	\$44	\$163	\$96	\$352	2.2	3.7
Other Overnight	\$54	\$217	\$167	\$672	3.1	4.0
All Overnight	\$103	\$346	\$253	\$858	2.4	3.3

On average, visitors who stayed in a hotel or motel **spent \$186 per day** and stayed approximately **3.0 days**.

**Sources:** U.S. Census Bureau, Smith Travel Research, OmniTrak Group, Dean Runyan Associates

# Glossary

Term	Definition
Accommodations	Overnight lodging for travelers, vacationers, and others. Paid accommodations include hotels, motels, STVRs, bed & breakfasts, RV resorts, and campgrounds. Unpaid accommodations include seasonal homes (2nd homes) and private home visiting friends or relatives (VFR)
Arts, Ent., Rec., & Gaming	Establishments that facilitate live performances or events, preserve exhibits and sites for public viewing, or facilitate recreational leisure-time activities. Examples include event venues, non-hotel casinos, and museums
Day Travel	Greater than 50 miles traveled non-routine to the destination
Destination Spending	Interchangeable with Visitor Spending. Direct spending made by visitors in a destination
Direct Earnings	Total after-tax net income for travel. Includes wages and salary disbursements, proprietor income, and other earned income or benefits
Direct Employment	Employment generated by direct spending; includes full time, part time, seasonal, and proprietors
Direct Spending	Expenditures made by consumers; a combination of Visitor Spending and Other Spending
Food Services	Establishments that prepare food and beverages for immediate consumption on premise or off-premises
Food Stores	Retail establishments that primarily sell food and beverage products
Hotel, Motel, STVR	Accommodation types that house transient lodging activity
Local Taxes	City and county taxes generated by travel spending
Local Trans. & Gas	Local transportation includes 1) transportation by taxi, limousine, rail, water, charter bus, urban transit, or interurban and rural bus system 2) rental of a passenger car or non-commercial truck, trailer, or RV 3) parking lots and garages. Gas includes establishments who primarily sell auto fuels and oils
Other Overnight	Combination of overnight visitors who stay in RV resorts, campgrounds, or 2nd homes
Other Spending	Spending by residents on travel arrangement services, or spending on convention activities
Private Home (VFR)	Personal residences used to host visiting friends and family overnight
Retail Sales	Establishments that sell goods to the public
Seasonal home (2nd home)	Homes under private ownership for personal use as a vacation property
State Taxes	State taxes generated by travel spending
STVR	Short Term Vacation Rental. Private and semi-private lodging rented by owners or property management companies (e.g. Airbnb, VRBO)
Visitor Spending	Direct spending made by visitors in a destination





# Methodology

The direct travel impacts reported in this analysis were estimated using DRA's Regional Travel Impact Model (RTIM). First developed in 1985, this model estimates direct impacts at a local level without relying on annual survey research. The "bottom up" approach of the RTIM involves modeling of private and public data at the county level, ensuring that the final findings correspond closely with the various travel indicators available for each respective county. Results are then aggregated into regions and the state or disaggregated to the city level based on relevant indicators at these geographic levels. The result is a detailed profile of taxes, employment, wages, and spending that can be tracked consistently over time.

The economic impact associated with day visitors and overnight visitors is a primary breakout included in this report. Lodging tax data and survey data on visitor expenditures inform estimates of total spending associated with overnight visitors who stay in commercial lodging in the studied region. DRA maintains its own expenditure distribution database for each state we work in, with input from multiple major survey providers. The inventory of campgrounds is collected for commercial and public sites, and occupancy is modeled based on a representative subset of sites. Sales attributable to travelers staying in their second homes are calculated from inventories from the US Census and public information on average utilization rates. Visitation of friends and relatives (VFR) is generally stable across time and geography, the primary driver for a destination being the local resident population. Estimates of visitor spending related to day travel can be driven by several factors, including proximity to nearby populous areas, opportunities for recreation and shopping, and inventory of lodging options compared to surrounding areas. Baseline estimates for day visitation are calculated as a factor of overnight visitation, the factor derived from regional results of national visitor profile data.

Spending on travel-related activities translates into jobs, earnings, and taxes. Calculation of these direct impacts relies on public data on jobs, wages, and business receipts by industry for each geographical area. State and local taxes on travel-related business are also factor in triangulating direct travel impacts. DRA estimates overnight visitor volume by cross-referencing visitor surveys and lodging data. Because of this, the volume estimates reported here may not align with estimates that rely solely on visitor surveys. Visitor Spending is a more reliable metric than Visitor Volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys.

Findings in this report have been compared to various public and private data sources to ensure that the economic impacts estimates are as accurate as possible. Key private data sources used for the purposes of this analysis include Smith Travel Research and OmniTrak. Public data sources include the U.S. Census Bureau, U.S. Bureau of Economic Analysis (BEA), U.S. Bureau of Labor Statistics (BLS), U.S. Energy Information Administration (EIA), U.S. Bureau of Transportation Statistics (BTS), California Employment Development Department (EDD), and the city of Santa Ana.



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