Study of resident perceptions of short-term holiday letting (STHL) across 12 Mid and North Coast NSW council areas

Southern Cross University
School of Business & Tourism

Research Project Team

Dr Tania von der Heidt (Project leader)
Tania.vonderheidt@scu.edu.au

Dr Sabine Muschter (Lead research assistant)
Sabine.muschter@scu.edu.au

Dr Rodney Caldicott
Rod.caldicott@scu.edu.au

Dr Deborah Che
Deborah.che@scu.edu.au

Peter Corlis (Analyst)
Peter.corlis@scu.edu.au

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1 Executive Summary

This report provides the overall results of research conducted to ascertain resident perceptions of short-term holiday lettings (STHLs), including Airbnb, across the 12 councils in the Destination North Coast (DNC) zone (also referred to the Mid and North Coast areas) of New South Wales (NSW), Australia. The results for each of the 12 individual councils were compiled and forwarded separately to those councils.

The research project follows a systematic scoping study in 2017-18 of international peer-reviewed studies on the implications of Airbnb on local communities (see Caldicott, von der Heidt, Scherrer, Muschter, & Canosa, 2019), and a study in 2018 of STHL in the Byron Shire (see Che, Muschter, von der Heidt, & Caldicott, 2019). The current project was commenced following receipt of a Seed Funding Grant from the Tourism Research Cluster in Southern Cross University's School of Business and Tourism (SBAT) with joint-funding from Destination NSW and Destination North Coast.

The objectives of this 2019 project were to extend the scope of the 2018 Byron Shire study to include the other 12 council/local government areas (LGAs) of the Mid North and North Coasts of NSW through:

1. Profiling the nature of STHL, particularly Airbnb, in the 12 communities, i.e. to determine the size, main attributes and development patterns of Airbnb in these areas.
2. Exploring, describing, and analysing community perspectives on the perceived impacts of Airbnb within their Shire, in order to inform specific and locally appropriate policy solutions.

To address Objective 1, the SBAT research team accessed secondary data from Inside Airbnb and BnbGuard STHL reporting services. To address Objective 2, the team conducted primary research in the form of a survey to residents of the 12 council areas with respondents self-identifying as Airbnb Hosts (AH), Approved Accommodation Providers (AAP), and Other residents. Recognisably, Airbnb has a range of impacts, which may be perceived similarly or differently by AHs, AAPs and Other residents.

Key overall findings:

1. Three major positive (economic) impacts of Airbnb on the *general community* were perceived by most respondents: (1) increased revenues for local business; (2) increased employment opportunities, and (3) greater variety of retail services. Across all councils, AHs tended to view these impacts more positively than AAPs and Other residents. AHs indicated that Airbnb contributes to local government tax revenues, but this view was not supported by Other residents.

2. AAPs and, in particular, Other residents agreed that Airbnb has a number of negative impacts on the *community*. The top three perceived negative impacts were: (1) increased traffic and parking congestion, (2) reduced availability of affordable housing for locals, and (3) increased noise levels in neighbourhood. AHs perceived no negative impacts.

3. Airbnb has positive impacts for *specific* stakeholders, but may have no/negligible or even a negative impacts on *other* community members. Notably, the majority of respondents agreed that Airbnb has positive impacts for the following stakeholders:
    - For *AHs* in terms of income generation, and allowing AHs to stay in their home (AHs agreed most strongly).
    - For *AHs* and *AAPs* in terms of bringing more visitors to the area.
    - For *tourists* in terms of providing more variety of accommodation, and making the tourist destination more affordable (AHs agree most strongly).
    - For *property investors* in terms of increasing the number of investable properties, as well as increasing property prices.

4. Respondents' preferences for STHL day limits varied by type of STHL arrangement:
   - For primary residence properties with a *host present*, 61% of all respondents preferred no day limit.
   - For primary residence properties *temporarily holiday let without a host* present, 45% of all respondents favoured a 90- or 180-day limit; 36% preferred no day limit and 19% wished for a full restriction (0-days; no STHL rentals).
   - For permanently *non-hosted investment properties*, the preferences were split fairly evenly: 37% of all respondents preferred no restriction, 32% preferred a 90- or 180-day limit, and 31% wanted a full restriction (0-days; no STHL rentals). In other words, the majority of respondents (63%) favoured a model involving mandatory *on-site management* for any STHL.

   AHs tended to prefer no, or lower day limits compared with AAPs and Other residents.
5. Most AAPs and Other residents felt that STHL needs to be better regulated, particularly in terms of: (1) more adequate avenues to lodge complaints of misconduct, (2) enforcement of non-compliance, and (3) compulsory public liability insurance to cover STHL guests and third parties for injury and damage. Almost all of the Airbnb hosts disagreed with any STHL regulation needs.

6. AAPs and Other residents agreed with the need for greater public information on Airbnb-related issues, in particular on: (1) the extent of compliance with existing STHL regulation, (2) regulation of Airbnb rentals (e.g. rights and responsibilities of hosts and guests), and (3) impacts of Airbnb on longer-term residential rental accommodation. Almost all AHs disagreed with, or were neutral with regard to, the need to know more about Airbnb-related issues.

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2.1 STHL – definition and issue

Short-term holiday letting (STHL), also known as short-term letting (STL) or short-term rental accommodation (STRA), refers to the letting of a residential house or unit mainly for holiday purposes but does not include development application (DA) approved accommodation such as a hotel, motel or hostel. This research primarily focuses on the world's largest, fastest-growing STHL platform, Airbnb.

Governments around the world are grappling with how best to regulate Airbnb, and Other forms of STHL, e.g. HomeAway/Stayz. Australia is experiencing rapid growth in Airbnb listings, with New South Wales (NSW) having the highest number of listings, approximately 67,801 properties as of November 2019 (Inside Airbnb 2019). In some areas the growth in Airbnb has contributed to high visitor-to-local ratios. For example, Byron Shire in Northern NSW receives more than two million visitors annually resulting in a disproportional Visitor/Local ratio. As highlighted by Caldicott, von der Heidt, Scherrer, Muschter, & Canosa (2019), visitors outnumber residents by a ratio of 70:1 in a Shire that is also one of Australia's least affordable regional rental housing markets. The juxtapositions give cause for growing community resentment around perceived inequities and social impacts of unregulated tourism at the local government level.

Presently, no state-wide regulation for STHL, including Airbnb, exists in NSW. Acknowledging the gap, in June 2018 the NSW Government announced a policy review for STRA. Through a discussion paper titled 'A new regulatory framework' released in August 2019, the NSW government (2019) invited feedback from interested parties on the proposed instruments to implement the policy. The proposed whole-of-government framework includes a mandatory code of conduct for STRA. Submissions closed on 11 September 2019. As at the time of writing this report, the results of the consultation process have not been published, and the framework has not yet been introduced. Under the Draft State Environmental Planning Policy (STRA) 2019, the provisions of the policy are to be reviewed one year after implementation. Thus, policy amendments are still possible. For instance, there is scope, through the review process, for non-metropolitan councils to consider a short-term letting cap of less than 360-days for non-hosted managed properties.

2.2 The nature and growth of Airbnb

Airbnb is a prominent example of an online peer-to-peer (P2P) platform embracing the sharing economy. Described as the "poster child of the broader platform economy landscape" (Dann, Teubner, & Weinhardt, 2019, p. 450), it is an informal tourism accommodation sector that has significant disruptive potential (Guttentag, 2015). It enables individuals to become hosts and to compete with commercial accommodation operators without taking the risk of major investments or overhead costs. While Other home-sharing concepts exist, Airbnb's platform makes it easier and more attractive to connect people who have homes, studios or rooms to rent with visitors looking for a place to stay (Guttentag, 2015).

As of November 2019, Airbnb was active in 65,000 cities in 191 countries, had around 150 million users, over 650,000 hosts and in excess of five million listings (Airbnb, 2019; Statista, 2019).

Listings in Australia increased from 69,705 at end of 2016 to 130,665 at end of 2017 and reached almost 166,000 at end of 2019 (Inside Airbnb, 2019). According to Inside Airbnb, listings in NSW increased from almost 29,700 at end of 2016 to 67,801 at end of 2019 - an increase of 138%. As of December 2019, there were 6,459 Airbnb listings for the Northern Rivers (NSW) area alone. However, other states such as Queensland and Victoria, almost tripled their Airbnb listings between end of 2016 and end of 2019. All states continued to experience increases of Airbnb listings during 2018 and 2019.

Regional Australia is also embracing the Airbnb concept, with a steady increase in Airbnb listings. Airbnb's growth is felt particularly in coastal destinations, such as the Byron Shire and other coastal areas (Gurran, Zhang, Shrestha, & Gilbert, 2018). At the same time, according to the Australian Coastal Councils Association, North Coast areas in NSW are among Australia's least affordable rental housing markets with a high and increasing number of properties listed as STHLs (Gurran et al., 2018). The majority of these STHLs are listed via online rental platforms, notably Airbnb.

2.3 Research into Airbnb in the Byron Shire

In 2018 researchers from Southern Cross University's (SCU) School of Business and Tourism (SBAT) undertook a systematic scoping study of international peer-reviewed studies from 2008 to 2018 on the implications of Airbnb on local communities (Caldicott et al., 2019). The researchers found that Airbnb raises polarised opinions within communities around the world. They identified a range of positive and negative economic, social and ecological impacts of Airbnb on four main community stakeholders – traditional accommodation providers, Airbnb hosts, Other residents (e.g. private individuals), and local government.

Also in 2018, in order to understand the main attributes and development patterns of Airbnb in the Byron Shire, the SBAT researchers undertook a two-pronged research study. This involved: (1) in-depth interviews across diverse and multiple Byron Shire stakeholder groupings with and without an interest in Airbnb, and (2) a large-scale survey of Byron Shire residents on various aspects of Airbnb. The results of the Byron Shire research project were published through a council report (Che et al., 2019) and also, the *International Journal of Tourism Cities - special issue on Sharing Economy in a Changing Tourism Ecosystem* (von der Heidt, Muschter, Caldicott, & Che, 2019).

2.4 Research into Airbnb in the Mid and North Coast of NSW

Following the positive response to the 2018 Byron Shire study, the SBAT researchers, in 2019 were invited to expand their study of Airbnb and STHL in partnership with Destination North Coast (DNC) – one of six Destination Networks in NSW. This new study was to encompass each of the other 12 councils of the region between Tweed and Kyogle in the north to Tea Gardens/Hawks Nest in the south: Ballina, Bellingen, Clarence Valley, Coffs Harbour, Kempsey, Kyogle, Lismore, MidCoast, Nambucca, Port Macquarie-Hastings, Richmond and Tweed. (The 14th DNC council, Lord Howe Island, was excluded on the basis of its small population (<400) and existing tight restrictions on tourist arrivals).

The aim of the 2019 research was two-fold:

1. To understand the size, main attributes and development patterns of Airbnb in each of these 12 Local Government Areas (LGAs).
2. To describe and analyse community perspectives on the perceived impacts of Airbnb within the 12 LGAs.

This research is significant and timely. First, because it is important that policy makers have comprehensive, reliable, and evidence-based information on their own locations, especially as the impacts of the STHL sector are often contested. Second, because of the imminent introduction of Draft State Environmental Planning Policy (STRA) 2019 and its consequences on local councils. The outcomes of the research can inform specific and locally appropriate policy solutions for affordable housing and tourism destination marketing.

Figure 1 - Council areas in Mid and North Coast (Destination North Coast) of NSW

2.4.1 Results of profiling STHL in the Mid and North Coasts of NSW area

To understand the main attributes and development patterns of Airbnb in the Mid and North Coast areas (Project Aim 1), the researchers retrieved Airbnb listings in this area from Inside Airbnb[1] and BnbGuard[2] - two STHL data reporting services in Australia.

A profile of each of the 12 councils in terms of population size and STHL listings is provided in **Appendix 1**. Profile data from the Byron Shire Council 2018 study is also provided, in order to present a snapshot of all 13 councils in the Mid and North Coasts of NSW. Notable results are as follows:

- Inside Airbnb (2019) holds records for Airbnb listings in the Mid and North Coast NSW area from 2016. In the 12 council areas Airbnb listings increased 371% over the last three years - from 4,072 at the end of 2016 to 6,456 at the end of 2019. The rate of growth in these 12 council areas has outpaced that of the Byron Shire, which grew by 195% in the same time period, albeit from a higher base. In December 2016 the number of Airbnb's in Byron (1,172) was already more than three times as high as that of the next biggest tourist destination in the Mid and North Coast – Tweed (with just 289 Airbnb listings at end of 2016). This data suggests that the other 12 councils are following the Airbnb trend started in Byron.

[1] Inside Airbnb provides data solely on Airbnb property listings.
[2] BnbGuard STHL counts include STHLs advertised on both the Airbnb- and Stayz/HomeAway platforms. BnbGuard also has a wider geographical scoping of each council area than Inside Airbnb. This explains why BnbGuard STHL counts are higher than those of Inside Airbnb.

- BnbGuard identifies 9,476 unique STHL addresses, including Airbnb and Stayz (HomeAway), across the Mid and North Coast areas in November 2019. The majority (90%) of the listings were for entire houses or apartments, and 60% of the listings were available for rent all year around. According to BnbGuard, 10% of hosts had multiple listings. An overview of the STHL listings (as per BnbGuard) in each of the 12 Mid and North Coast council areas has been provided in each of 12 individual council reports. A sample for the Port Macquarie-Hastings Council is presented in **Appendix 2**.

3 Survey research design

The research team leveraged the survey instrument from the 2018 Byron Shire study. The following main survey questions were retained from the Byron study:

- Identification of resident status - Airbnb host and non-host (Other residents)
- Perceived positive and negative impacts of Airbnb lettings on housing and accommodation, local businesses, tax revenues, visitor numbers, infrastructure and neighbourhoods across the Shire*
- Perceived impact of any nearby STHL properties on the respondent*
- Perceived importance of information needs about various aspects related to Airbnb*
- Preferences for measures to improve regulation of the STHL sector (including Airbnb*)
- Preferences for day limits (night caps) on STHL
- For Airbnb hosts: The motivation for becoming an Airbnb host*; the nature of the accommodation, the platforms on which the accommodation is advertised.

Further, several new questions related specifically to Approved Accommodation Provider (AAP) and Airbnb Hosts (AH) were added to capture the following information:

- Identification of resident status - AAP was added
- For AAPs: The particular accommodation sector of operation, the size of the accommodation, impact perception of Airbnb on operations*, perceptions on effectiveness of existing STHL regulation*.

*Above-mentioned attitudinal responses were measured using a five-point Likert scale (1=strongly disagree to 5=strongly agree).

Most questions were directed to all respondents with only those questions related to AH and the AAP experiences directed to those groups respectively.

The revised baseline survey was administered within Qualtrics. It was reviewed and pre-tested by the research team, other academics from the School, DNC management and a representative of each of the 12 councils. Pre-test feedback was incorporated in successive revisions to the survey. Once all parties were satisfied, the new baseline survey was replicated online for each of the 12 LGAs.

Individual survey links were provided to each council together with instructions to help councils incorporate the survey links into their own digital (e.g. website) and print media (e.g. newsletters) to circulate and promote the survey to residents. The research team also worked with the University's media office to issue a media release (Southern Cross University, 2019), which contained the 12 survey links. The survey was launched on 2 September 2019. Response rates were tracked on a weekly basis, with regular follow-up by the research team to DNC. DNC further liaised with council staff in order to maximise survey response rates. The survey closed on 31 October 2019.

4 Key results from survey

4.1 Sample profile

4.1.1 Overview of 12 councils

A profile of each of the 12 councils in terms of population, survey response rate, and respondent resident type (AH, AAP, or Other resident) is included in **Appendix 1**. Survey data from the Byron Shire Council 2018 study is also provided.

For the current study, the aim was to achieve the 2.2% survey response rate (in terms of resident population) similar to the 2018 Byron Shire survey. However, the achieved response rates in the 2019 were lower than expected – ranging from 0.1% (Port Macquarie-Hastings Council) to 0.9% (Bellingen Shire Council). There are several possible explanations for the below-target response rates: (1) The early onset of the bushfire season meant that some councils understandably reprioritised their limited resources toward assisting the community rather than promoting the survey, and many residents were pre-occupied with the threat of bush fires; (2) the low number of STHL listings relative to Byron Shire, meaning that fewer residents may be concerned about STHL issues; (3) late or sub-optimal action on the part of some councils in executing their strategies to promote the survey.

Of the 1632 respondents in the 12 LGAs surveyed, 169 (10%) self-classified as AHs, 320 (20%) as AAPs, with the balance of 1143 (70%), registering as Other residents.

The average length of respondent residency within the Mid and North Coast area was 16 years. Of all respondents, 44% of reported residing in the area for less than 11 years, 30% between 11 and 20 years, and 26% reported residing in the area for over 20 years.

Of the 1632 respondents, 86% (1,409) lived in their own properties, whereas 12% (196) rented, and 2% (27) respondents selected the 'Other' option. Furthermore, 79% of all respondents said that they were aware of STHLs near their residence, of which 87% were thought to be Airbnb listings. Overall, only 44 (of 1605) respondents acknowledged that they had been asked to leave a rental property due to its change to STHL. Of these, 22 respondents said that their lost property was than listed on Airbnb. Of the 44, five (11%) respondents found another rental property within the same neighbourhood; 13 (30%) respondents moved to a different neighbourhood in the same town; 14 (32%) respondents moved to another town in the council area, and 12 (27%) respondents moved outside the council area.

4.2 Perceived impacts of Airbnb

The perceived impacts of Airbnb can be grouped into three categories: (1) Impacts that are positive for the local community of residents, (2) those that are negative for the local community, and (3) those that are positive for *specific* community stakeholders, but may have no/negligible or even a negative impact on *Other* community members. The latter category is referred to as 'mixed' impacts. For example, Airbnb leading to more visitors in a council area is generally good for STHL hosts and business/tourism operators. However, it most likely has little impact on those people living outside the tourist hotspot areas and may even be unfavourable for some locals, who may be concerned, for example about the loss of amenity or change in culture of their home town.

4.2.1 Positive impacts of Airbnb

An aggregation of respondent perceptions from all 12 LGAs on the following **four positive impacts** of Airbnb on the community - ranked by mean - is presented in Table 1. Results for each of the 12 LGAs are provided in **Appendix 3**.

The majority of all respondents (72%) believed that Airbnb increases revenues for local businesses. Around half of the respondents also perceived two other positive impacts of Airbnb on the general economy: increased employment opportunities (52%), and greater variety of retail services (48%). Across all councils, AHs tended to perceive all positive impacts more favourably than AAPs and Other residents. The views between Airbnb hosts and the other two respondent types diverged most strongly for the impact 'leads to increased employment opportunities for locals'. Airbnb hosts tended to strongly agree (mean 4.26), whereas AAPs (mean 3.25) and Other residents (mean 3.10) agreed less strongly. Only 26% of respondents felt that Airbnb 'increased local government tax revenues'. AHs were most in accord with this view (mean 3.36), whereas Other residents and AAPs were sceptical (means of 2.69 and 2.81 respectively).

Table 1 - Positive impacts on the general economy

	Mean				Overall agreement (%)		
Airbnb leads to ...	**Overall (n=1632)**	**Airbnb hosts (n=320)**	**AAPs (n=169)**	**Other residents (n=1143)**	**Disagree**	**Neither**	**Agree**
1. Increases revenues for local businesses	3.87	4.57	3.78	3.69	*11%*	*17%*	*72%*
2. Leads to greater variety of retail services (e.g. restaurants, leisure services)	3.34	4.00	3.30	3.16	*23%*	*29%*	*48%*
3. Increased employment opportunities for locals	3.34	4.26	3.25	3.10	*27%*	*21%*	*52%*
4. Increased local government tax revenues	2.84	3.36	2.81	2.69	*37%*	*37%*	*26%*

* Disagree = includes groups Strongly Disagree and Disagree; Neither = neither Agree nor Disagree; Agree = includes groups Agree and Strongly Agree

4.2.2 Negative impacts of Airbnb

Not many of the nine negative impacts of Airbnb on the community (ranked by mean) were perceived as such by the respondents overall (see Table 2). Results for each of the 12 LGAs are provided in **Appendix 4**.

Negative impacts were perceived by AAPs and, even more so, by Other residents. Most AHs disagreed with all statements (as indicated in means ≤ 2.5). Just under half of respondents agreed on the top three negative impacts of Airbnb: (1) Increased traffic and parking congestion, (2) reduced affordable housing for locals, and (3) increased noise levels. Furthermore, 44% of respondents agreed that Airbnb listings increased conflicts between residents of the neighbourhood; and adversely affected resident neighbourhood lifestyles. Increased waste management problems were also perceived as a negative impact of Airbnb (43% agreement)

Table 2 - Negative impacts for the community

	Mean				Overall agreement (%)		
Airbnb ...	**Overall (n=1632)**	**Airbnb hosts (n=320)**	**AAPs (n=169)**	**Other residents (n=1143)**	**Disagree**	**Neither**	**Agree**
1. Increases traffic and parking congestion	3.31	2.14	3.28	3.64	*33%*	*18%*	*49%*
2. Reduces availability of affordable housing for locals	3.28	2.29	3.18	3.58	*34%*	*18%*	*48%*
3. Increases noise levels in neighbourhood	3.26	2.07	3.10	3.62	*33%*	*21%*	*46%*

Airbnb ...	Mean				Overall agreement (%)		
	Overall (n=1632)	Airbnb hosts (n=320)	AAPs (n=169)	Other residents (n=1143)	Disagree	Neither	Agree
4. Increases conflicts between residents of the neighbourhood	3.25	2.10	3.18	3.59	*32%*	*24%*	*44%*
5. Leads to increased waste management problems	3.18	2.21	3.10	3.47	*34%*	*23%*	*43%*
6. Adversely affects residents' neighbourhood lifestyle	3.15	1.88	2.98	3.53	*39%*	*17%*	*44%*
7. Leads to extra costs to ratepayers to provide infrastructure	3.04	2.06	2.98	3.32	*40%*	*22%*	*38%*
8. Leads to increased anti-social behaviour	2.93	1.74	2.80	3.28	*43%*	*22%*	*35%*
9. Leads to overuse of public facilities	2.77	1.88	2.75	3.02	*46%*	*28%*	*26%*

* Disagree = includes groups Strongly Disagree and Disagree; Neither = neither Agree nor Disagree; Agree = includes groups Agree and Strongly Agree

4.2.3 Mixed impacts *(or consequences*) of Airbnb

Airbnb has positive impacts for *specific* stakeholders, but may have no/negligible or even a negative impact on *other* community members. Respondent perceptions of the following **seven mixed impacts** of Airbnb on community – ranked by mean- are presented in Table 3. Results for each of the 12 LGAs are provided in **Appendix 5.**

The majority of respondents agreed that Airbnb has positive impacts for the following specific stakeholders:

- For *AHs* in terms of income generation, and allowing AHs to stay in their home (92% agreed).
- For *AHs* and *AAPs* in terms of bringing more visitors to the area (83% agreed).
- For *tourists* in terms of providing more variety of accommodation (82% of respondents agreed), and making the tourist destination more affordable (56% agreed).
- For *property investors* in terms of increasing the number of investable properties, thus property investors (52% agreed). However, respondents were ambivalent about the impact of Airbnb on property prices.

AHs agreed most emphatically with all positive impacts, except those related to property investment and prices, whereas AAPs and Other residents agreed less strongly.

Table 3 - Mixed impacts of Airbnb

Airbnb...	Mean				Overall agreement (%)		
	Overall (n=1632)	Airbnb hosts (n=320)	AAPs (n=169)	Other residents (n=1143)	Disagree	Neither	Agree
1. Provides income for Airbnb hosts	4.27	4.42	4.26	4.23	*2%*	*6%*	*92%*
2. Offers more variety in accommodation for tourists	4.04	4.48	4.04	3.91	*9%*	*9%*	*82%*
3. Increases number of visitors into the Shire	4.04	4.13	3.87	4.04	*5%*	*12%*	*83%*
4. Makes the Shire a more affordable tourist destination	3.49	4.24	3.44	3.28	*21%*	*23%*	*56%*
5. Enables Airbnb hosts to stay in their homes	3.46	4.13	3.51	3.27	*14%*	*36%*	*50%*

Airbnb...	Mean				Overall agreement (%)		
	Overall (n=1632)	Airbnb hosts (n=320)	AAPs (n=169)	Other residents (n=1143)	Disagree	Neither	Agree
6. Leads to increased number of property investors	3.52	3.18	3.62	3.52	*13%*	*35%*	*52%*
7. Increases the property prices	2.91	2.80	2.82	2.96	*34%*	*38%*	*28%*

* Disagree = includes groups Strongly Disagree and Disagree; Neither = neither Agree nor Disagree; Agree = includes groups Agree and Strongly agree

4.3 Preferences for rental caps on STHL properties

The survey captured views of AAPs, AHs, and Other residents on duration of their preferred rental cap (day limits) for three types of STHL properties: (a) primary residence with a host present; (b) primary resident temporarily without a host present, and (c) permanently non-hosted investment properties (see Table 4).

(a) For primary residence properties with a host present (***with on-site*** management)

Among all 12 LGAs, 62% of all respondents felt that there should be no restrictions at all for properties *with on-site* management, meaning that these properties could be rented 365 days per year. Notably, 92% of all Airbnb hosts wanted no restrictions on properties *with on-site management*, compared to 48% of AAPs and 53% of Other residents. A cap for *on-site* managed properties of less than 90-days was favoured by 31% of AAPs and 33% of Other residents, compared to 4% of the Airbnb hosts.

(b) For primary residence properties temporarily without a host (e.g. the property is holiday-let while the resident is away, therefore temporarily ***without on-site*** management)

Among all 12 LGAs, 35% of all respondents wanted no restrictions. Forty-five percent of respondents favoured a 90 -or 180- day limit; 20% preferred a full restriction (0-days; no STHL rentals). Notably, 64% of all Airbnb hosts wanted no restrictions on properties, compared to only 28% of Other residents, and 32% of AAPs. Forty-seven percent of AAPs and 56% of Other residents wanted a restriction of less than 90-days for residence properties which are temporarily rented out without a host on site, whereas only 14% of the Airbnb hosts indicated this preference.

c) For permanently non-hosted investment properties (***without on-site*** management)

Among all 12 LGAs, the preferences were split fairly evenly: 37% of all respondents preferred no restriction, 32% preferred a 90- or 180-day limit, and 31% wanted a full restriction (0-days; no STHL rentals). Notably, even 9% of the Airbnb hosts wanted a full restriction (0-days) for such properties.

In summary, the majority of respondents favoured a model involving mandatory *on-site management* for STHL properties.

Table 4 - Differences regarding rental caps on STHL

	365 days per year (No restriction)	Max. 180 days per year	Less than 90 days per year	0 days (Not allowed at all)	Total
A. For primary residence properties with host present (%)					
Airbnb hosts	*92*	*4*	*4*	*0*	*100*
AAPs	*58*	*11*	*20*	*11*	*100*
Other residents	*53*	*14*	*21*	*12*	*100*
Total of all respondents	***62***	***12***	***17***	***9***	***100***
B. For primary residence properties temporarily without host (%)					

Airbnb hosts	*64*	*22*	*13*	*1*	*100*
AAPs	*32*	*21*	*23*	*24*	*100*
Other residents	*28*	*16*	*32*	*24*	*100*
Total of all respondents	***35***	***18***	***27***	***20***	***100***
C. For permanently non-hosted investment properties (%)					
Airbnb hosts	*66*	*15*	*10*	*9*	*100*
AAPs	*36*	*13*	*18*	*33*	*100*
Other residents	*29*	*14*	*20*	*37*	*100*
Total of all respondents	***37***	***14***	***18***	***31***	***100***

* N = 1541 respondents including 159 AAPs, 304 Airbnb hosts & 1078 Other residents

Results for each of the 12 LGAs are provided in **Appendix 6.** An inspection of the distribution of preferences shows that respondents in three council areas (Ballina, Bellingen and Tweed) tend to have more conservative views on STHL compared with the other nine LGAs. In these three LGAs, fewer respondents preferred unrestricted STHL for all three types of STHL accommodation, and preferred tighter restrictions in terms of day limits. By contrast, respondents most in favour of fewer restrictions on STHL can be found in Nambucca Valley and Port Macquarie-Hastings Council areas.

4.4 Preferences for regulating STHL in the Mid and North Coasts of NSW

Most respondents supported seven of the nine proposed ways to regulate STHL as set out in Table 5. Results for each of the 12 LGAs are provided in **Appendix 7.**

The majority (78%) of respondents asked for more adequate reporting avenues to lodge complaints of misconduct, 72% of respondents requested appropriate enforcement of non-compliance, and 71% sought the introduction of compulsory public liability insurance for STHL guests and third parties for injury and damage. The introduction of a bed-tax was perceived by all three groups as the least important regulation matter (only 33% agreed). Overall, the Airbnb hosts appeared to disagree with almost any regulation of their operations, including no zoning restrictions, a registration system and any restriction on non-hosted STHLs. The views of Other residents seemed to be more aligned to those of the AAPs than to the Airbnb hosts.

Table 5 - Ways to regulate STHL in the council area

	Mean				**Overall agreement (%)**		
STHL needs to be regulated in the following ways …	**Overall (n=1565)**	**Airbnb hosts (n=303)**	**AAPs (n=159)**	**Other residents (n=1103)**	**Disagree**	**Neither**	**Agree**
1. Adequate reporting avenues to lodge complaints of misconduct	4.02	3.39	3.99	4.19	*10%*	*12%*	*78%*
2. Adequate enforcement of non-compliance	3.92	3.09	4.06	4.12	*13%*	*15%*	*72%*
3. Compulsory public liability insurance to cover STHL guests and third parties for injury or damage (including Airbnb)	3.83	2.89	4.03	4.06	*19%*	*10%*	*71%*
4. Adequate provision of fair trade (level playing field) within the accommodation-provider sector	3.52	2.58	3.83	3.73	*21%*	*24%*	*55%*
5. Implementation of a registration/permit system for STHL	3.44	2.06	3.70	3.78	*32%*	*11%*	*57%*
6. Council-supported community advisory panel regarding STHL	3.40	2.42	3.50	3.65	*26%*	*21%*	*53%*
7. Restrictions on Airbnb properties without on-site management	3.30	2.15	3.52	3.59	*35%*	*14%*	*51%*

STHL needs to be regulated in the following ways …	Mean				Overall agreement (%)		
	Overall (n=1565)	Airbnb hosts (n=303)	AAPs (n=159)	Other residents (n=1103)	Disagree	Neither	Agree
8. Zoning restrictions for STHL in residential areas	3.07	1.65	3.16	3.40	*43%*	*11%*	*46%*
9. A bed tax or levy for any tourist accommodation (irrespective of the accommodation type)	2.69	1.56	2.18	3.07	*50%*	*17%*	*33%*

* Disagree = includes groups Strongly Disagree and Disagree; Neither = neither Agree nor Disagree; Agree = includes groups Agree and Strongly agree

The contrasting views on STHL regulation are also captured in two email submissions sent by Mid and North Coast residents to the SBAT research team's leader during the survey period. On one hand, a retired, Ballina-based AH (M.R., 2019), who wished to remain anonymous, cautioned against "an over-zealous approach to regulating any new activity like B&Bs… . It is important to also recognise the local real estate agents' part in this [STHL] letting area, which is self-regulating and not under local council pressures. The troubles their tenants create are mostly passed to the local police!" He suggested that "hosts should be required to register with an approved provider, and the providers report annually to the chosen authority on hosts' records and financial results".

An opposing point of view was expressed by a Clarence Valley-based couple (Cairns & Cairns, 2019), presumably an AAP. They provided a detailed submission outlining their concerns about the State Environmental Planning Policy (SEPP) STRA 2019, including:

a. Ensuring compliance with the number of persons residing in the STHL and the limit of two persons for each bedroom. With 12 persons [the maximum allowed in the STHL dwelling] "it is virtually a commercial enterprise and hence is unfairly competing with traditional commercial accommodation operators in the area, such as hotels, motels, etc.".
b. The lack of consideration of car parking and disabled access in the SEPP.
c. The lack of requirement for public liability insurance to be obtained and verified on a regular basis.
d. When a pool is onsite at a STRA dwelling, the lack of consideration about pool testing and safety, while traditional commercial accommodation providers have strict requirements in this regard.
e. The higher rates being paid by traditional commercial operators being zoned commercial relative to the STRAs zoned as residential.
f. The ability of local councils to ensure compliance and enforcement of the SEPP, as well as to gain access to registry records.
g. Whether hosts/owners will register. "There appears to be a reliance on neighbours to come forward, which in turn could potentially result in neighbourhood hostility and disputes, altering the amenity of the area".
h. How to capture STHL bookings outside of a booking platform, i.e. direct to the host/owner. Such direct bookings would under-report bookings and may circumvent regulation.

Cairns and Cairns (2019) concluded that as "STRA is a commercial operation (it) should be subject to the same compliance issues, inspections, fees and charges as traditional commercial operators. Otherwise it is detrimental to the traditional commercial operators and the growth of STRA will potentially change the population demographic and amenity in areas".

4.5 Preferences for further information needs on Airbnb

Around half of all respondents supported seven of the eight proposed ways to provide more information to the public on Airbnb-related issues within the Mid and North Coast council areas (see Table 6). Results for each of the 12 LGAs are provided in **Appendix 8.**

Over half of the respondents indicated it was very important to have more information regarding the extent of compliance with existing STHL regulations (59%), about regulations regarding Airbnb rentals (59%), and about impacts on the community (57%). Furthermore, more information about impacts of Airbnb on long-term residential rental accommodation, on businesses in town, and on infrastructure were sought by around half the respondents. AAPs and Other residents agreed with the need for greater public information on Airbnb-related issues. Again, Airbnb hosts generally declared much lower information needs than AAPs and Other residents.

Table 6 - Information needs of residents about Airbnb in the council area

	Mean				Importance (%)		
Important to have information about ...	**Overall (n=1586)**	**Airbnb hosts (n=311)**	**AAPs (n=163)**	**Other residents (n=1112)**	**Not important**	**Average important**	**Very important**
1. Extent of compliance with existing STHL regulations	3.65	2.91	3.87	3.83	*16%*	*25%*	*59%*
2. Regulations regarding Airbnb rentals (e.g. hosts' responsibilities, guests' rights)	3.63	3.04	3.78	3.77	*18%*	*23%*	*59%*
3. Impacts on long-term residential rental accommodation	3.58	2.73	3.67	3.81	*20%*	*25%*	*55%*
4. Impacts on local businesses	3.56	3.38	3.77	3.58	*12%*	*33%*	*55%*
5. Impacts of Airbnb on the community	3.56	2.87	3.58	3.80	*16%*	*27%*	*57%*
6. Impacts on infrastructure (i.e. roads, waste management facilities)	3.50	2.83	3.56	3.68	*18%*	*30%*	*52%*
7. Impacts on approved accommodation providers (e.g. B&Bs, Hotels)	3.39	2.52	3.84	3.57	*23%*	*28%*	*49%*
8. The location and type of Airbnb properties	3.15	2.23	3.31	3.39	*32%*	*25%*	*43%*

* Not important = includes groups Not important at all and Of little importance; Of average importance; Very important = includes groups Very important and Absolutely essential

In their email submission to the SBAT research team, Cairns and Cairns (2019) recommend that “Fair Trading, local councils and letting agents should have full access to the Register, particularly to monitor and ensure compliance and enforcement. However, hosts would only require information/data of the dwelling they manage. Information on whether a dwelling is registered as an STRA should be publicly available”.

4.6 Airbnb Hosts sample and their perceptions

Of the 320 Airbnb hosts, who responded to the initial survey questions, 304 responded to the specific AH questions towards the end of the survey. These 304 AHs represent 19% of all respondents. As can be seen in Table 7 below, most (83%) of AHs agreed with the statement that they enjoy assisting their Airbnb guests with their travel needs. The majority (71%) also enjoyed the social engagement with their guests, as well as the additional income that enables them to afford living in the Mid and North Coast areas. These results suggest that Airbnb hosts are motivated by altruism somewhat more than by economic gain.

Table 7 - Motivation to become an Airbnb host

	Mean (n=304)	Overall agreement (%)		
Motivation to become an Airbnb host	**Overall Mean**	**Disagree**	**Neither**	**Agree**
1. It gives me pleasure to assist Airbnb guests with their travel needs/inquiries	4.45	*4%*	*13%*	*83%*
2. I enjoy the social engagement with Airbnb guests	4.11	*6%*	*23%*	*71%*
3. The additional income from Airbnb	3.66	*16%*	*13%*	*71%*
4. I feel more secure with Airbnb guests in my residence	3.24	*19%*	*41%*	*40%*

* Disagree = includes groups Strongly Disagree and Disagree; Neither = neither Agree nor Disagree; Agree = includes groups Agree and Strongly agree

The types of accommodation hosted by AHs was also captured in the survey – see Table 8. A total of 479 accommodation property listings were reported. For over half (53%) of Airbnb properties, the AH lived on-site. Around one-quarter (23%) of Airbnb properties were temporarily vacated primary residences with no on-site hosting. Another quarter (24%) of Airbnb listings were investment properties (with no on-site management at any time). Of these, 71 (15%) listings were permanently let whole houses.

With 479 accommodation type listings among the 304 AHs, several AHs appeared to have multiple listings, including investment properties without on-site management. AN AH with multiple properties is effectively operating a business. This suggests that their primary motivation is commercial, rather than social in nature. A primary social/altruistic motivation to run an Airbnb would apply only to AHs living in their single-listed property and merely enjoying the supplemental income and intrinsic reward of host/guest interactions.

Table 8 - Airbnb accommodation types

	On-site management	**Without on-site management (at a primary residential property)**	**Without on-site management (at an investment property)**
Accommodation types*		**Number of all Airbnb's**	
Individual bedroom(s)	75	20	14
An attached studio	60	7	6
A detached studio/cottage	56	10	11
A whole house	46	71	71
Other	14	4	14
Total number of accommodation type	**251**	**112**	**116**
% of all Airbnb's (n=479)	***53%***	***23%***	***24%***

* Multiple listings possible

Besides advertising their STHL property on Airbnb, the majority of hosts stated that they also advertised on other platforms, particular Stayz (HomeAway) and Booking.com.

4.7 Approved accommodation provider (AAP) sample

The sample size of the AAPs who responded to the specific AAP questions was 161 (of the 169, who completed in the initial survey questions), i.e. 10% of all respondents. Questions on the AAP experience were directed only to those who were running a DA approved accommodation business. Nearly half (48%) stated that they were the owners and managers of the accommodation business, whereas 41% were the owners of the business, and 11% of AAPs were the managers.

The accommodation type varied widely. The most frequently named categories were: 1) B & B (26%), 2) Other (15%), 3) Serviced Apartment/Hotel (13%), 4) Motel/Motor Inn (10%), 5) Rural Tourism Facility (9%), 6) Guesthouse (9%) and 7) Caravan/Tourist Holiday Park (8%). Over half (58%) of approved accommodations provide one to five rooms, while 16% provided 6-15 rooms, 12% provided 16 to 30 rooms, and 14% provided more than 30 rooms.

Most of the AAPs (89%) stated that they advertise their business on the Airbnb website. Forty percent of the AAPs (157) agreed with the statement that 'the growth of Airbnb listings in my area has impacted negatively on my property's performance of the last three years'. Further, 23% of the AAPs indicated that they do not feel supported by the NSW government regarding STHL legislation.

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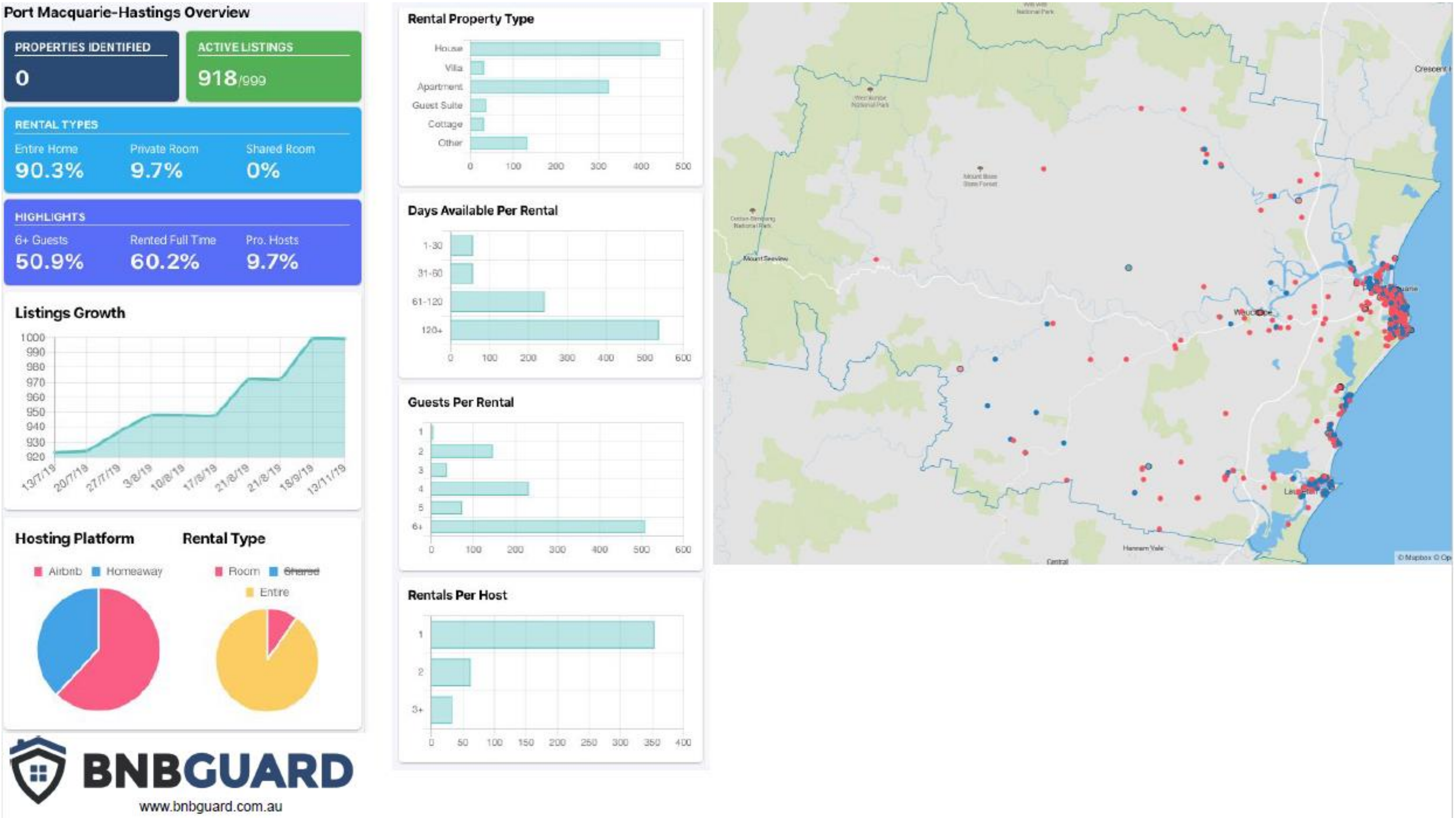
7 Appendices

7.1 Appendix 1: Council profiles - population, number of survey respondents and STHL listings

Council	**Popula-tion**	**Res-pon-ses**	*% of Popu-lation*	**Resident Type**						Airbnb & Stayz listings Nov 2019: BnbGuard	**Airbnb only listings: Inside Airbnb**				
				AAP	*% AAP hosts*	Airbnb Host	*% Airbnb hosts*	Other	*% Other*		Dec 2016	Dec 2017	Dec 2018	Dec 2019	% increase 2016-2019
Ballina Shire Council	44,208	161	*0.4%*	14	*9%*	29	*18%*	118	*73%*	704	193	439	563	616	*219%*
Bellingen Shire Council	12,963	116	*0.9%*	18	*16%*	15	*13%*	83	*72%*	299	78	169	218	214	*174%*
Coffs Harbour City Council	76,551	158	*0.2%*	22	*14%*	61	*39%*	75	*47%*	1,288	179	589	751	880	*392%*
Clarence Valley Council	51,647	99	*0.2%*	18	*18%*	29	*29%*	52	*53%*	973	108	275	474	644	*496%*
Kempsey Shire Council	29,665	76	*0.3%*	11	*14%*	12	*16%*	53	*70%*	935	54	143	389	420	*678%*
Kyogle Council	8,870	39	*0.4%*	6	*15%*	3	*8%*	30	*77%*	60	14	34	56	47	*236%*
Lismore City Council	43,843	100	*0.2%*	4	*4%*	15	*15%*	81	*81%*	205	77	165	210	222	*188%*
MidCoast Council*	90,504	152	*0.2%*	18	*12%*	27	*18%*	107	*70%*	2,186	177	813	990	1,222	*590%*
Nambucca Valley Council	19,773	110	*0.6%*	15	*14%*	24	*22%*	71	*65%*	281	50	154	193	202	*304%*
Port Macquarie-Hastings Council	83,131	122	*0.1%*	15	*12%*	38	*31%*	69	*57%*	918	148	397	632	620	*319%*
Richmond Valley Council	23,399	41	*0.2%*	5	*12%*	6	*15%*	30	*73%*	127	5	16	21	32	*540%*
Tweed Shire Council	96,108	458	*0.5%*	23	*5%*	61	*13%*	374	*82%*	1,500	289	878	1,202	1,337	*363%*
Total, excluding Byron Shire	580,662	1,632	*0.3%*	169	*10%*	320	*20%*	1,143	*70%*	9,476	1,372	4,072	5,699	6,456	*371%*
Byron Shire Council (2018)	34,574	766	*2.2%*	N/A	*N/A*	151	*20%*	615	*80%*	3,684	1,172	2,740	3,037	3,452	*195%*
Total, including Byron Shire	**615,236**	**2,451**	**0.4%**	**169**	***7%***	**471**	***19%***	**1,758**	***74%***	**13,160**	**2,544**	**6,812**	**8,736**	**9,908**	***289%***

7.2 Appendix 2: Airbnb & Stayz listings in the Port-Macquarie Hastings Council[3]



3. BnbGuard (27 Nov 2019): BnbGuard.com.au provides short-term letting address identification and data reporting services for councils across Australia. A sample dashboard is available here: https://bnbguardv2.herokuapp.com/nsw/sydney/suburbs/summary

7.3 Appendix 3: Survey results for perceptions about positive impacts of Airbnb (12 councils)

Council	Resident type	No. responses (Frequency)	Increased revenues for local business (Mean)	Greater variety of retail services (Mean)	Increased employment opportunities for locals (Mean)	Increased local government revenues (Mean)
All councils 2019	**AAP**	**169**	**3.78**	**3.30**	**3.25**	**2.81**
	Airbnb	**320**	**4.57**	**4.00**	**4.26**	**3.36**
	Other	**1143**	**3.69**	**3.16**	**3.10**	**2.69**
	All	***1632***	***3.87***	***3.34***	***3.34***	***2.84***
Ballina Shire	AAP	14	3.57	3.00	3.00	2.36
	Airbnb	29	4.66	4.14	4.24	3.14
	Other	118	3.51	3.05	2.91	2.59
	All	*161*	*3.73*	*3.24*	*3.16*	*2.67*
Bellingen Shire	AAP	18	3.50	2.94	3.13	2.56
	Airbnb	15	4.47	4.00	4.07	3.20
	Other	83	3.76	3.24	3.17	2.57
	All	*116*	*3.82*	*3.30*	*3.29*	*2.66*
Coffs Harbour City	AAP	22	3.68	3.27	2.77	2.82
	Airbnb	60	4.62	4.12	4.15	3.35
	Other	75	3.83	3.27	3.37	2.84
	All	*158*	*4.11*	*3.59*	*3.59*	*3.03*
Clarence Valley	AAP	18	3.72	3.17	3.11	2.44
	Airbnb	29	4.48	3.97	4.34	3.41
	Other	52	3.62	3.02	3.00	2.46
	All	*99*	*3.90*	*3.33*	*3.42*	*2.74*
Kempsey Shire	AAP	11	3.91	4.00	3.55	3.55
	Airbnb	12	4.58	4.17	4.58	3.83
	Other	53	3.85	3.31	3.35	2.94
	All	*76*	*3.97*	*3.55*	*3.57*	*3.17*
Kyogle	AAP	6	4.00	3.50	3.83	2.17
	Airbnb	3	4.67	3.67	3.67	3.67
	Other	30	3.83	3.23	3.30	2.87
	All	*39*	*3.92*	*3.31*	*3.41*	*2.82*
Lismore City	AAP	4	4.25	3.25	2.75	2.50
	Airbnb	15	4.50	3.29	4.07	3.43
	Other	81	3.61	3.11	2.99	2.73
	All	*100*	*3.77*	*3.14*	*3.13*	*2.82*
MidCoast	AAP	17	4.18	3.53	3.88	3.12

Council	Resident type	No. responses (Frequency)	Increased revenues for local business (Mean)	Greater variety of retail services (Mean)	Increased employment opportunities for locals (Mean)	Increased local government revenues (Mean)
	Airbnb	27	4.74	4.07	4.59	3.15
	Other	107	3.88	3.21	3.41	2.83
	All	*146*	*4.08*	*3.40*	*3.68*	*2.92*
Nambucca Valley	AAP	15	3.87	3.20	3.27	3.07
	Airbnb	24	4.75	3.96	4.42	3.21
	Other	71	3.86	3.37	3.18	2.97
	All	*110*	*4.05*	*3.47*	*3.46*	*3.04*
Port-Macquarie Hastings	AAP	15	3.73	3.27	3.13	2.87
	Airbnb	38	4.42	3.95	4.26	3.66
	Other	69	3.91	3.63	3.40	2.93
	All	*122*	*4.05*	*3.68*	*3.64*	*3.15*
Richmond Valley	AAP	5	3.75	3.25	3.50	3.75
	Airbnb	6	4.83	4.33	4.67	3.83
	Other	30	3.83	2.80	2.67	2.97
	All	*41*	*3.97*	*3.08*	*3.05*	*3.18*
Tweed Shire	AAP	23	3.74	3.43	3.39	2.83
	Airbnb	61	4.47	3.98	4.12	3.27
	Other	374	3.56	3.05	2.94	2.54
	All	*458*	*3.69*	*3.20*	*3.12*	*2.65*

7.4 Appendix 4: Survey results for perceptions about negative impacts of Airbnb (12 councils)

Council	Resident type	No. responses (Frequency)	Increased traffic & parking congestion (Mean)	Reduces availability of affordable housing for locals	Increased noise levels in neighbourhood	Increased conflict between residents in neighbourhood	Increased waste management problems	Adversely affects neighbourhood resident lifestyles	Extra costs to rate payers for infrastructure	Increased anti-social behaviour	Over-use of public facilities
All councils 2019	**AAP**	**169**	**3.28**	**3.18**	**3.10**	**3.18**	**3.10**	**2.98**	**2.98**	**2.80**	**2.75**
	Airbnb	**320**	**2.14**	**2.29**	**2.07**	**2.10**	**2.21**	**1.88**	**2.06**	**1.74**	**1.88**
	Other	**1143**	**3.64**	**3.58**	**3.62**	**3.59**	**3.47**	**3.53**	**3.32**	**3.28**	**3.02**
	All	***1632***	***3.31***	***3.28***	***3.26***	***3.25***	***3.18***	***3.15***	***3.04***	***2.93***	***2.77***
Ballina Shire	AAP	14	2.86	2.93	2.79	3.57	3.00	3.00	2.86	2.71	2.29
	Airbnb	29	2.62	2.83	2.31	2.34	2.66	2.38	2.38	1.97	2.00
	Other	118	4.01	4.00	3.94	3.85	3.74	3.94	3.68	3.59	3.38
	All	*161*	*3.66*	*3.70*	*3.54*	*3.55*	*3.48*	*3.58*	*3.37*	*3.22*	*3.04*
Bellingen Shire	AAP	18	4.06	4.06	3.56	3.50	4.00	3.56	3.88	3.38	3.81
	Airbnb	15	2.27	2.47	1.73	2.00	2.13	1.80	2.07	1.60	2.13
	Other	83	3.75	3.90	3.44	3.51	3.54	3.45	3.36	2.99	3.27
	All	*116*	*3.59*	*3.74*	*3.23*	*3.31*	*3.41*	*3.25*	*3.26*	*2.86*	*3.20*
Coffs Harbour City	AAP	22	3.50	3.23	3.59	3.82	3.36	3.18	3.23	3.27	3.09
	Airbnb	61	2.02	2.26	2.20	2.15	2.20	1.87	2.00	1.80	1.82
	Other	75	3.37	3.28	3.28	3.31	3.15	3.19	2.92	2.92	2.77
	All	*158*	*2.87*	*2.88*	*2.91*	*2.94*	*2.82*	*2.68*	*2.61*	*2.54*	*2.45*
Clarence Valley	AAP	18	3.56	3.44	3.50	3.50	3.17	3.61	2.83	3.06	2.83
	Airbnb	29	1.83	2.10	1.69	1.52	1.79	1.41	1.66	1.41	1.62
	Other	52	3.70	3.65	3.60	3.56	3.54	3.54	3.28	3.28	3.14
	All	*99*	*3.11*	*3.16*	*3.01*	*2.94*	*2.95*	*2.93*	*2.71*	*2.68*	*2.63*
Kempsey Shire	AAP	11	3.64	3.55	3.36	3.00	3.36	3.00	3.45	2.64	3.27
	Airbnb	12	2.33	2.58	2.33	2.25	2.67	1.92	2.17	1.92	2.08
	Other	53	3.46	3.23	3.54	3.27	3.44	3.36	3.10	3.12	3.02
	All	*76*	*3.31*	*3.17*	*3.32*	*3.07*	*3.31*	*3.08*	*3.00*	*2.85*	*2.91*
Kyogle	AAP	6	2.00	2.50	2.67	3.33	3.00	2.33	2.83	2.67	2.17
	Airbnb	3	1.67	3.00	1.33	1.33	1.00	1.00	1.33	1.00	1.33
	Other	30	3.23	3.50	3.23	3.37	3.13	3.13	3.07	2.90	2.57
	All	*39*	*2.92*	*3.31*	*3.00*	*3.21*	*2.95*	*2.85*	*2.90*	*2.72*	*2.41*
Lismore City	AAP	4	3.25	3.50	2.75	2.75	3.00	3.00	3.00	2.75	2.50
	Airbnb	15	1.93	2.47	1.64	1.93	1.71	2.00	2.00	1.50	2.00

Council	**Resident type**	No. responses **(Frequency)**	Increased traffic & parking conges-tion **(Mean)**	Reduces availa-bility of affor-dable housing for locals	Increased noise levels in neigh-bour-hood	Increased conflict between residents in neighbour-hood	Increased waste manage-ment problems	Adversely affects neigh-bourhood resident lifestyles	Extra costs to rate payers for infra-structure	Increased anti-social beha-viour	Over-use of public facilities
	Other	81	3.51	3.74	3.30	3.49	3.29	3.43	3.41	3.08	2.95
	All	*100*	*3.28*	*3.54*	*3.04*	*3.23*	*3.05*	*3.20*	*3.19*	*2.84*	*2.80*
MidCoast	AAP	18	2.88	2.61	2.71	2.53	2.59	2.56	2.18	2.41	2.35
	Airbnb	27	2.37	2.00	2.41	2.30	2.56	2.00	2.07	2.07	2.04
	Other	107	3.55	3.35	3.63	3.52	3.46	3.38	3.25	3.26	2.92
	All	*152*	*3.25*	*3.02*	*3.29*	*3.09*	*3.19*	*3.04*	*2.91*	*2.95*	*2.69*
Nambucca Valley	AAP	15	3.13	3.20	2.80	2.67	3.00	2.67	2.67	2.47	2.53
	Airbnb	24	2.04	2.29	2.04	1.92	2.17	1.87	2.29	1.75	1.79
	Other	71	3.44	3.52	3.24	3.24	3.31	3.10	3.17	2.89	2.80
	All	*110*	*3.09*	*3.21*	*2.92*	*2.87*	*3.02*	*2.77*	*2.91*	*2.58*	*2.55*
Port-Macquarie Hastings	AAP	15	3.13	3.13	2.93	2.93	2.67	3.13	2.80	2.53	2.53
	Airbnb	38	1.84	1.84	1.68	1.76	1.82	1.55	1.74	1.42	1.71
	Other	69	3.03	2.81	3.06	3.03	2.91	3.03	2.73	2.72	2.33
	All	*122*	*2.67*	*2.55*	*2.61*	*2.62*	*2.53*	*2.58*	*2.43*	*2.28*	*2.16*
Richmond Valley	AAP	5	3.25	2.40	2.25	2.25	3.00	2.20	2.75	2.00	1.75
	Airbnb	6	1.83	1.67	1.67	2.00	2.00	1.67	1.83	1.17	1.33
	Other	30	3.37	3.77	3.53	3.30	3.47	3.70	3.00	3.10	2.77
	All	*41*	*3.13*	*3.29*	*3.12*	*3.00*	*3.20*	*3.22*	*2.80*	*2.70*	*2.45*
Tweed Shire	AAP	23	3.22	2.96	3.00	3.09	2.87	2.61	3.04	2.74	2.61
	Airbnb	61	2.33	2.44	2.32	2.52	2.43	2.10	2.30	1.95	2.05
	Other	374	3.82	3.64	3.91	3.87	3.63	3.78	3.50	3.61	3.16
	All	*458*	*3.59*	*3.45*	*3.65*	*3.65*	*3.43*	*3.50*	*3.31*	*3.35*	*2.98*

7.5 Appendix 5: Survey results for perceptions about mixed impacts of Airbnb (12 councils)

Council	**Resident type**	No. respon-ses **(Frequency)**	Income for Airbnb hosts **(Mean)**	More variety in accom-modation for tourists	Increased number of visitors	A more affordable tourist destination	Airbnb hosts can stay in home	Increased no. of property investors	Increases property prices
All councils 2019	**AAP**	**169**	**4.26**	**4.04**	**3.87**	**3.44**	**3.51**	**3.48**	**2.82**
	Airbnb	**320**	**4.42**	**4.48**	**4.13**	**4.24**	**4.13**	**3.18**	**2.80**
	Other	**1143**	**4.23**	**3.91**	**4.04**	**3.28**	**3.27**	**3.62**	**2.96**
	All	***1632***	***4.27***	***4.04***	***4.04***	***3.49***	***3.46***	***3.52***	***2.91***
Ballina Shire	AAP	14	4.43	4.29	3.79	3.43	3.57	3.86	3.21
	Airbnb	29	4.45	4.55	4.24	4.03	4.31	3.31	3.07
	Other	118	4.26	3.92	4.10	3.09	3.24	3.77	3.13
	All	*161*	*4.31*	*4.07*	*4.10*	*3.29*	*3.46*	*3.69*	*3.12*
Bellingen Shire	AAP	18	4.17	3.67	4.06	3.19	3.39	3.19	2.89
	Airbnb	15	4.80	4.80	4.53	4.33	4.40	2.93	2.27
	Other	83	4.31	4.14	3.94	3.08	3.43	3.66	3.40
	All	*116*	*4.35*	*4.16*	*4.04*	*3.26*	*3.55*	*3.50*	*3.17*
Coffs Harbour City	AAP	22	4.27	3.82	3.73	3.18	3.36	3.45	2.45
	Airbnb	60	4.49	4.44	4.18	4.27	4.16	3.25	2.82
	Other	75	4.23	4.07	4.09	3.65	3.47	3.51	2.93
	All	*158*	*4.34*	*4.18*	*4.08*	*3.82*	*3.72*	*3.40*	*2.82*
Clarence Valley	AAP	18	4.11	3.83	4.00	3.11	3.11	3.56	2.50
	Airbnb	29	4.21	4.31	4.03	4.07	3.93	3.21	2.31
	Other	52	4.31	3.63	3.94	3.10	3.21	3.68	2.75
	All	*99*	*4.24*	*3.87*	*3.98*	*3.39*	*3.40*	*3.52*	*2.58*
Kempsey	AAP	11	4.27	4.18	4.00	3.45	3.91	3.73	3.00
	Airbnb	12	4.42	4.08	3.92	4.00	4.00	3.25	3.25
	Other	53	4.23	4.19	4.21	3.29	3.45	3.65	3.21
	All	*76*	*4.26*	*4.17*	*4.13*	*3.43*	*3.61*	*3.60*	*3.18*
Kyogle	AAP	6	4.33	4.33	4.17	3.50	3.33	2.37	2.33
	Airbnb	3	5.00	5.00	4.67	4.67	4.33	2.67	2.00
	Other	30	3.97	3.77	4.03	3.33	3.37	3.50	2.77
	All	*39*	*4.10*	*3.95*	*4.10*	*3.46*	*3.44*	*3.31*	*2.64*
Lismore City	AAP	4	5.00	4.75	2.75	3.75	3.50	3.75	2.00
	Airbnb	15	4.47	4.53	3.86	4.43	4.47	2.43	2.80

	Other	81	4.28	4.04	3.89	3.50	3.28	3.71	3.37
	All	*100*	*4.34*	*4.14*	*3.84*	*3.64*	*3.47*	*3.53*	*3.23*
MidCoast	AAP	17	4.28	4.17	3.94	3.82	3.83	3.41	2.94
	Airbnb	27	4.59	4.70	4.22	4.19	4.15	3.52	2.67
	Other	107	4.29	3.89	4.08	3.22	3.33	3.68	2.84
	All	*146*	*4.34*	*4.07*	*4.09*	*3.47*	*3.53*	*3.62*	*2.82*
Nambucca Valley	AAP	15	4.13	4.00	4.00	3.53	4.27	3.33	3.00
	Airbnb	24	4.38	4.42	4.12	4.21	4.21	3.12	2.75
	Other	71	4.30	4.08	3.99	3.46	3.55	3.58	3.17
	All	*110*	*4.29*	*4.15*	*4.02*	*3.64*	*3.79*	*3.45*	*3.05*
Port-Macquarie Hastings	AAP	15	4.33	4.27	3.67	3.60	3.20	3.67	2.93
	Airbnb	38	4.16	4.53	4.03	4.50	3.97	3.13	2.55
	Other	69	4.16	4.12	4.01	3.82	3.36	3.31	2.71
	All	*122*	*4.18*	*4.26*	*3.98*	*4.01*	*3.53*	*3.30*	*2.69*
Richmond Valley	AAP	5	3.40	4.20	3.75	4.00	3.20	3.25	2.80
	Airbnb	6	4.67	5.00	4.33	4.50	5.00	3.83	4.00
	Other	30	4.27	4.10	3.97	3.37	3.40	3.33	3.17
	All	*41*	*4.22*	*4.24*	*4.00*	*3.60*	*3.61*	*3.40*	*3.24*
Tweed Shire	AAP	23	4.39	4.00	3.91	3.52	3.43	3.52	3.00
	Airbnb	61	4.39	4.39	4.03	4.20	3.93	3.13	3.08
	Other	374	4.18	3.73	4.07	3.17	3.08	3.62	2.75
	All	*458*	*4.22*	*3.83*	*4.06*	*3.32*	*3.21*	*3.55*	*2.81*

7.6 Appendix 6: Preferences for STHL day limits (12 councils)

Council	Responses (Frequency)	a) For primary residence properties with host present				b) For primary residence properties temporarily without host (e.g. the property is holiday-let while the resident is away)				c) For permanently non-hosted investment properties			
		365 days	180 days	90 days	0 days	365 days	180 days	90 days	0 days	365 days	180 days	90 days	0 days
Ballina Shire Council	155	52%	14%	23%	10%	26%	22%	28%	24%	27%	10%	25%	38%
Bellingen Shire Council	108	59%	15%	14%	12%	30%	23%	26%	21%	29%	19%	15%	37%
Coffs Harbour City Council	154	73%	7%	14%	5%	53%	18%	16%	13%	51%	17%	10%	22%
Clarence Valley Council	91	65%	7%	21%	8%	47%	13%	22%	18%	47%	12%	16%	24%
Kempsey Shire Council	69	67%	13%	16%	4%	43%	28%	20%	9%	54%	14%	22%	10%
Kyogle Council	39	74%	5%	10%	10%	38%	18%	18%	26%	38%	13%	15%	33%
Lismore City Council	93	65%	14%	16%	5%	34%	19%	32%	14%	29%	16%	23%	32%
MidCoast Council	136	66%	12%	14%	8%	43%	17%	25%	15%	44%	15%	18%	23%
Nambucca Valley Council	104	76%	6%	13%	5%	38%	18%	37%	7%	38%	13%	28%	20%
Port Macquarie-Hastings Council	114	76%	7%	10%	7%	52%	17%	20%	11%	54%	12%	13%	21%
Richmond Valley Council	37	65%	14%	11%	11%	54%	5%	22%	19%	51%	11%	14%	24%
Tweed Shire Council	441	49%	15%	22%	14%	23%	16%	32%	29%	26%	13%	18%	43%
All Councils	**1,541**	**61%**	**12%**	**17%**	**9%**	**36%**	**18%**	**27%**	**19%**	**37%**	**14%**	**18%**	**31%**

Council	Responses	a) With on-site management				b) Without on-site management (regardless of status as primary residence or investment property)			
		365 days	180 days	90 days	0 days	365 days	180 days	90 days	0 days
Byron Shire Council (2018)	766	37%	28%	28%	7%	16%	18%	27%	39%

7.7 Appendix 7: Preferred council measures to improve STHL day regulation (12 councils)

Council	**Resident type**	No. responses **(Frequency)**	Registration permit system **(Mean)**	Compulsory public liability insurance	Restrictions on unhosted STHL	Bed tax or levy for all accommodation	Zoning restrictions for STHL in residential areas	Adequate reporting avenues to lodge complaints	Adequate provision of level playing field	Adequate enforcement of non-compliance	Council-supported community advisory panel
All councils 2019	**AAP**	**159**	**3.70**	**4.03**	**3.52**	**2.18**	**3.16**	**3.99**	**3.83**	**4.06**	**3.50**
	Airbnb	**303**	**2.06**	**2.89**	**2.15**	**1.56**	**1.65**	**3.39**	**2.58**	**3.09**	**2.42**
	Other	**1103**	**3.78**	**4.06**	**3.59**	**3.07**	**3.40**	**4.19**	**3.73**	**4.12**	**3.65**
	All	***1565***	***3.44***	***3.83***	***3.30***	***2.69***	***3.07***	***4.02***	***3.52***	***3.92***	***3.40***
Ballina Shire	AAP	14	3.64	4.36	3.57	2.14	3.14	4.00	3.71	4.00	3.29
	Airbnb	27	2.22	2.74	2.41	2.00	1.70	3.81	2.56	3.37	2.74
	Other	117	4.07	4.15	3.84	3.50	3.69	4.31	3.95	4.30	3.79
	All	*158*	*3.72*	*3.92*	*3.57*	*3.12*	*3.30*	*4.20*	*3.69*	*4.11*	*3.57*
Bellingen Shire	AAP	16	4.38	4.50	4.19	3.00	3.69	4.25	4.38	4.25	4.13
	Airbnb	15	2.27	2.93	2.87	1.47	2.13	3.47	3.13	3.40	2.60
	Other	80	3.74	3.86	3.46	3.30	3.16	3.97	3.65	3.89	3.65
	All	*111*	*3.63*	*3.46*	*3.49*	*3.01*	*3.10*	*3.95*	*3.68*	*3.87*	*3.58*
Coffs Harbour City	AAP	22	3.68	4.23	3.73	2.41	3.45	4.32	4.27	4.23	3.95
	Airbnb	59	2.29	2.95	2.08	1.76	1.83	3.59	2.83	3.31	2.59
	Other	74	3.42	3.82	3.12	2.89	3.01	4.03	3.30	3.91	3.39
	All	*155*	*3.03*	*3.55*	*2.81*	*2.39*	*2.63*	*3.90*	*3.26*	*3.72*	*3.17*
Clarence Valley	AAP	17	3.94	4.18	3.65	2.24	3.29	4.18	4.12	4.35	3.53
	Airbnb	27	1.85	2.93	1.93	1.63	1.52	3.15	2.48	2.93	2.15
	Other	49	3.53	3.94	3.57	3.02	3.39	4.31	3.71	4.12	3.69
	All	*93*	*3.12*	*3.69*	*3.11*	*2.47*	*2.83*	*3.95*	*3.43*	*3.82*	*3.22*
Kempsey	AAP	10	3.70	4.40	3.10	2.20	3.10	3.80	39.00	4.00	3.30
	Airbnb	11	2.00	2.64	2.09	1.36	1.36	3.09	2.73	3.00	2.45
	Other	49	3.47	3.92	3.14	2.78	3.16	3.90	3.39	3.84	3.27
	All	*70*	*3.27*	*3.79*	*2.97*	*2.47*	*2.87*	*3.76*	*3.36*	*3.73*	*3.14*
Kyogle	AAP	6	3.50	3.50	4.00	1.67	3.50	3.17	3.67	3.83	2.17
	Airbnb	3	2.33	3.00	1.67	1.33	1.33	3.33	2.67	2.67	2.33
	Other	30	3.77	3.83	3.43	2.97	3.20	4.07	3.67	4.00	3.60
	All	*39*	*3.62*	*3.72*	*3.38*	*2.64*	*3.10*	*3.87*	*3.59*	*3.87*	*3.28*
Lismore City	AAP	3	3.00	3.67	2.33	1.33	3.00	3.33	3.33	3.67	3.00
	Airbnb	14	1.71	2.50	1.86	1.07	1.57	3.21	2.36	2.57	2.00

Council	Resident type	No. responses (Frequency)	Registration permit system (Mean)	Compulsory public liability insurance	Restrictions on unhosted STHL	Bed tax or levy for all accommodation	Zoning restrictions for STHL in residential areas	Adequate reporting avenues to lodge complaints	Adequate provision of level playing field	Adequate enforcement of non-compliance	Council-supported community advisory panel
	Other	79	3.84	4.06	3.57	3.23	3.65	4.28	3.95	4.28	3.67
	All	*95*	*3.48*	*3.81*	*3.29*	*2.87*	*3.31*	*4.08*	*3.68*	*4.00*	*3.39*
MidCoast	AAP	16	3.37	3.88	3.31	1.94	2.75	3.50	3.31	3.63	3.25
	Airbnb	23	2.22	3.43	2.22	1.43	1.74	3.48	2.48	2.96	2.39
	Other	100	3.68	3.90	3.37	2.56	3.24	4.13	3.69	4.07	3.58
	All	*139*	*3.40*	*3.82*	*3.17*	*2.30*	*2.94*	*3.95*	*3.45*	*3.83*	*3.35*
Nambucca Valley	AAP	14	3.64	3.21	3.86	1.86	3.07	3.93	3.79	4.14	3.36
	Airbnb	24	1.92	2.88	2.42	1.42	1.42	3.29	2.67	2.79	2.29
	Other	69	3.75	3.94	3.43	2.99	3.10	3.96	3.67	3.96	3.58
	All	*107*	*3.33*	*3.61*	*3.26*	*2.49*	*2.72*	*3.80*	*3.46*	*3.72*	*3.26*
Port-Macquarie Hastings	AAP	14	3.50	3.71	3.21	2.14	3.00	3.79	3.50	3.79	3.36
	Airbnb	38	1.84	2.66	1.79	1.26	1.24	2.92	2.16	2.92	2.29
	Other	63	2.98	3.68	2.95	2.40	2.75	3.78	3.22	3.62	2.90
	All	*115*	*2.67*	*3.35*	*2.60*	*1.99*	*2.28*	*3.50*	*2.90*	*3.41*	*2.76*
Richmond Valley	AAP	4	3.75	3.75	3.75	2.00	2.25	4.00	3.00	4.25	3.25
	Airbnb	6	1.50	2.17	1.33	1.00	1.17	2.83	1.33	2.67	2.33
	Other	27	3.56	3.93	3.00	2.56	2.81	3.93	3.44	3.78	3.30
	All	*37*	*3.24*	*3.62*	*2.81*	*2.24*	*2.49*	*3.76*	*3.05*	*3.65*	*3.14*
Tweed Shire	AAP	23	3.65	4.09	3.04	2.04	2.96	4.22	3.70	4.09	3.65
	Airbnb	57	2.14	3.09	2.30	1.65	1.91	3.60	2.74	3.28	2.47
	Other	366	4.02	4.31	3.95	3.25	3.83	4.41	3.89	4.33	3.88
	All	*446*	*3.76*	*4.14*	*3.69*	*2.98*	*3.54*	*4.30*	*3.73*	*4.19*	*3.69*

7.8 Appendix 8: Preferred information about Airbnb (12 councils)

Council	Resident type	No. respon-ses (Fre-quency)	Loca-tion & type of Airbnb property (Mean)	Regula-tion of Airbnb rentals, e.g. rights & respon-sibilities	Impacts of Airbnb on local commu-nity	Extent of comp-liance with existing STHL regula-tion	Impacts of Airbnb on local business	Impacts of Airbnb on infra-structure	Impacts of Airbnb on AAPs	Impacts of Airbnb on long-term residential rental accommo-dation
All councils 2019	**AAP**	**163**	**3.31**	**3.78**	**3.58**	**3.87**	**3.77**	**3.56**	**3.84**	**3.67**
	Airbnb	**311**	**2.23**	**3.04**	**2.87**	**2.91**	**3.38**	**2.83**	**2.52**	**2.73**
	Other	**1112**	***3.39***	***3.77***	***3.80***	***3.83***	***3.58***	***3.68***	***3.57***	***3.81***
	All	***1586***	***3.15***	***3.63***	***3.56***	***3.65***	***3.56***	***3.50***	***3.39***	***3.58***
Ballina Shire	AAP	14	3.00	3.79	3.50	3.79	3.57	3.36	3.50	3.50
	Airbnb	28	2.50	3.39	3.29	3.36	3.57	3.29	2.79	3.25
	Other	117	3.63	3.98	4.02	4.01	3.72	3.97	3.97	4.24
	All	*159*	*3.38*	*3.86*	*3.84*	*3.87*	*3.68*	*3.79*	*3.72*	*4.00*
Bellingen Shire	AAP	16	4.00	4.25	4.13	4.25	3.87	3.94	4.44	4.19
	Airbnb	15	2.53	3.73	3.67	3.33	3.67	3.40	2.73	3.13
	Other	80	3.25	3.51	3.94	3.76	3.52	3.83	3.67	4.09
	All	*111*	*3.26*	*3.65*	*3.93*	*3.77*	*3.59*	*3.78*	*3.66*	*3.97*
Coffs Harbour City	AAP	22	3.36	4.00	4.09	4.32	4.09	3.95	4.05	3.86
	Airbnb	60	2.22	3.20	2.88	2.97	3.43	2.85	2.63	2.65
	Other	74	3.18	3.49	3.55	3.61	3.51	3.51	3.32	3.68
	All	*156*	*2.83*	*3.45*	*3.37*	*3.46*	*3.56*	*3.32*	*3.16*	*3.31*
Clarence Valley	AAP	17	3.47	3.88	3.59	4.29	4.00	3.65	4.12	3.94
	Airbnb	28	2.00	2.68	2.43	2.61	3.07	2.39	2.18	2.32
	Other	50	3.22	3.58	3.68	3.80	3.54	3.68	3.44	3.82
	All	*95*	*2.91*	*3.37*	*3.29*	*3.54*	*3.48*	*3.29*	*3.19*	*3.40*
Kempsey	AAP	11	2.91	3.09	2.82	3.36	3.55	3.64	3.82	3.45
	Airbnb	12	2.33	3.08	3.25	3.00	3.92	3.58	2.75	2.92
	Other	50	3.04	3.50	3.62	3.56	3.56	3.56	3.24	3.66
	All	*73*	*2.90*	*3.37*	*3.44*	*3.44*	*3.62*	*3.58*	*3.25*	*3.51*
Kyogle	AAP	6	2.50	3.33	3.17	3.50	3.83	3.83	4.33	4.17
	Airbnb	3	2.00	2.33	2.67	2.67	3.33	2.33	2.00	2.67
	Other	30	3.47	3.73	3.87	4.07	3.73	3.57	3.77	3.80
	All	*39*	*3.21*	*3.56*	*3.67*	*3.87*	*3.72*	*3.51*	*3.72*	*3.77*
Lismore City	AAP	4	3.75	3.75	3.75	3.75	3.75	4.00	4.25	3.75
	Airbnb	14	2.36	2.79	2.71	2.36	2.79	2.50	2.21	2.64
	Other	80	3.25	3.74	3.79	3.84	3.71	3.79	3.55	3.99

Council	**Resident type**	No. respon-ses **(Fre-quency)**	Loca-tion & type of Airbnb property **(Mean)**	Regula-tion of Airbnb rentals, e.g. rights & respon-sibilities	Impacts of Airbnb on local commu-nity	Extent of comp-liance with existing STHL regula-tion	Impacts of Airbnb on local business	Impacts of Airbnb on infra-structure	Impacts of Airbnb on AAPs	Impacts of Airbnb on long-term residential rental accommo-dation
	All	*97*	*3.12*	*3.59*	*3.62*	*3.61*	*3.57*	*3.60*	*3.37*	*3.77*
MidCoast	AAP	17	3.59	3.82	3.53	3.76	3.94	3.29	3.59	3.29
	Airbnb	25	2.24	2.80	2.80	2.92	3.28	2.92	2.64	2.76
	Other	101	3.22	3.72	3.69	3.72	3.51	3.66	3.40	3.62
	All	*143*	*3.09*	*3.57*	*3.52*	*3.59*	*3.52*	*3.49*	*3.29*	*3.43*
Nambucca Valley	AAP	14	3.43	3.79	3.64	3.86	3.64	3.29	3.64	3.57
	Airbnb	24	2.38	3.00	2.83	2.92	3.54	2.58	2.38	2.54
	Other	69	3.23	3.48	3.55	3.51	3.58	3.42	3.46	3.58
	All	*107*	*3.07*	*3.41*	*3.40*	*3.42*	*3.58*	*3.21*	*3.24*	*3.35*
Port-Macquarie Hastings	AAP	15	2.67	3.80	3.33	3.53	3.53	3.27	3.47	3.40
	Airbnb	38	1.89	2.71	2.42	2.58	2.95	2.45	2.42	2.45
	Other	64	2.94	3.25	3.36	3.56	3.11	3.12	3.08	3.06
	All	*117*	*2.56*	*3.15*	*3.05*	*3.24*	*3.11*	*2.92*	*2.91*	*2.91*
Richmond Valley	AAP	4	2.75	3.50	3.25	3.25	3.50	3.50	3.25	3.25
	Airbnb	6	2.17	2.83	2.33	2.83	3.33	2.83	1.83	2.67
	Other	27	3.19	3.52	3.48	3.74	3.63	3.52	3.44	3.59
	All	*37*	*2.97*	*3.41*	*3.27*	*3.54*	*3.57*	*3.41*	*3.16*	*3.41*
Tweed Shire	AAP	23	3.39	3.61	3.43	3.65	3.57	3.39	3.70	3.57
	Airbnb	59	2.32	3.17	3.08	3.05	3.64	2.97	2.64	2.92
	Other	370	3.65	4.08	3.96	3.99	3.63	3.76	3.68	3.87
	All	*452*	*3.46*	*3.93*	*3.82*	*3.85*	*3.63*	*3.64*	*3.55*	*3.73*