Southern Cross University, School of Business and Tourism

An Investigation into the Nature and Range of Impacts of Short-term Rental Accommodation (including Airbnb) on Approved Accommodation Providers in the Byron Shire

Report to Byron Shire Council

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1 Executive Summary

This report provides a summary of current data obtained from primary research on the perspectives of Approved Accommodation Providers (AAPs) within the Byron Shire regarding perceived impacts of Short-term Rental Accommodation (STRA) on the Shire's accommodation sector.

The research project follows an initial 2018 systematic scoping study of international peer-reviewed studies on the implications of Airbnb on local communities (Caldicott, von der Heidt, Scherrer, Muschter, & Canosa, 2020) and the 2018 study of Byron Shire community perspectives on the impacts of Airbnb (Che, Muschter, von der Heidt, & Caldicott, 2019a). The research project 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 the Byron Shire Council.

The objectives of the 2019 project were twofold:

1. To determine the size, main attributes and development patterns of Airbnb, and AAPs in the Byron Shire and provide a descriptive summary.
2. To determine AAP attitudes regarding impacts of STRA (including Airbnb) on their business through pilot interviews and a survey.

To address the first objective, the SBAT research team accessed secondary data from Inside Airbnb which provides data on Airbnb property listings and the Tourism Australia data set about AAPs. Additionally, the research team created a database for AAPs in the Byron Shire which was then cross-checked with the commercial accommodation audit provided by the Byron Shire Council.

To address the second objective, the SBAT team undertook the following research. Phase 1 involved interviewing seven key informants from the accommodation, tourism, neighbourhood, and government sectors. This interview data further informed the development of the survey instrument for Phase 2. From the 115 AAPs in the Byron Shire, the survey yielded 57 useable responses.

Key findings from the AAP survey:

1. The majority of respondents felt that the growth of STRA in the Byron Shire has had the following negative impacts on the approved accommodation sector: (1) led/contributed to an oversupply of tourist accommodation in certain parts of the Byron Shire (88% of respondents); (2) decreased the potential commercial viability of approved accommodation businesses (88%); and (3) created an unequal playing field for AAPs (86%).
2. Over the last two reporting years, the majority of respondents (over 80%) stated that their business saw decreases in occupancy rate, average net-rate and net revenue. More respondents reported decreases for the comparative period 2017/18 to 2018/19 than for the period before.
3. Around half of respondents have considered undertaking several changes to their business operation over the last 12 months including: (1) upgrading/renovating the accommodation property (58% of respondents); (2) repositioning the business, for example, to target a different type of guest (45%); and (3) selling the business (33%).
4. There was an agreement among the respondents that the growth of STRA in the Byron Shire has resulted in changes to both their work and personal lives. A majority (84% of respondents) stated that they have to work harder in their accommodation job, while 65% felt more anxious and stressed. Over half of respondents found that their job satisfaction has decreased.
5. Over half (55%) of the respondents felt that the draft STRA Environmental Policy, Code of Conduct, and Fire Safety codes that the New South Wales (NSW) Department of Planning, Industry and Environment released via "A new regulatory framework" discussion paper in August 2019, were inadequate.

6. In terms of STRA day limits, most respondents preferred a regulatory model, which involved *on-site management* for any STRA. Around a third (31%) wanted 'No restriction' on rentals of STRA properties *with* on-site management, meaning the host could operate 365 days per year. However, for short-term rentals of primary residence properties *temporarily without* on-site management (e.g. the property is holiday let while the resident is away), the majority (91%) of respondents supported a 'Less than 90-days per year' restriction (including 40% who supported zero days restriction). For residential investment properties *permanently without* on-site management, 66% of respondents favoured rentals capped at '0-days' (such rentals not permitted at all), while 22% supported a cap of 'Less than 90-days per year'.
7. Most respondents felt that STRA needs to be better regulated. Over 90% of respondents suggested that regulation should include adequate enforcement of non-compliance and reporting avenues to lodge complaints of misconduct. Furthermore, 92% of respondents desired the creation of a mandatory local government operated register for all STRA - one that provides information to local or state government to support regulation (e.g. days of operation, fire safety, insurance). Almost 90% of respondents agreed that non-hosted STRAs should pay commercial council rates, as do AAPs. Further, 90% of respondents felt that AAPs were not being adequately supported by Byron Shire Council in terms of dealing with the increasing presence of STRAs across the Shire. None of the 57 respondents felt that the NSW government was sufficiently addressing the STRA phenomenon.

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2 Introduction

2.1 STRA defined

Short-term rental accommodation (STRA), also known as Short-term holiday letting (STHL) or short-term letting (STL) 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. While there are numerous short-term rental platforms, this research primarily focuses on the world's largest, fastest-growing accommodation platform, Airbnb.

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. It enables individuals to become hosts and to compete with commercial accommodation operators without taking the risk of major investments and/or operational costs (Guttentag, 2015). 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). Australia is experiencing rapid growth in Airbnb listings. Listings in Australia increased from 69,705 at the end of 2016 to 130,665 at the end of 2017 and reached almost 166,000 at the end of 2019. NSW has the highest numbers of listings. According to Inside Airbnb, listings in NSW increased from almost 29,700 at end of 2016 to 67,801 at the end of 2019 - an increase of 138%. 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 in Airbnb listings during 2018 and 2019 (Inside Airbnb, 2019b).

Regional Australia is also now embracing the Airbnb concept, with a steady increase in listings. As of December 2019, there were 6,459 Airbnb listings for the Northern Rivers (NSW) area alone. Airbnb's growth is particularly felt in popular coastal destinations such as the Byron Shire (Gurran, Zhang, Shrestha, & Gilbert, 2018). At the same time, according to the Australian Coastal Councils Association, areas within the North Coast 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 STRAs are listed on online rental platforms, notably Airbnb. In some NSW areas the growth in Airbnb listings has contributed to high visitor-to-local ratios. For example, the Byron Shire receives more than two million visitors annually (Destination Byron, 2019). Visitors outnumber residents by a ratio of 70 to one. Byron Shire is also one of Australia's least affordable regional rental housing markets.

2.3 Existing research into STRA/Airbnb by SBAT

Anecdotally, the rapid growth of STRA/Airbnb is leading to increased resentment of some community members concerning the inequities and social impacts of unregulated tourism at the local government level.

To explore the issues associated with growing STRA/Airbnb listings, researchers from Southern Cross University's SBAT undertook a systematic scoping study in 2017-18 of international peer-reviewed studies from 2008 to 2018 on the implications of Airbnb on local communities (Caldicott et al., 2020). The study found that worldwide, Airbnb polarises opinions within communities. It 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 respondents (e.g. local 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 team undertook a further two-pronged research study. This involved: (1) in-depth interviews with diverse and multiple Byron Shire stakeholders with and without an interest in Airbnb, and (2) a large-scale survey of Byron Shire residents to determine their views on various aspects of Airbnb. The results of the Byron Shire research project were published in a report to the Byron Shire Council (Che, Muschter, von der Heidt, & Caldicott, 2019b) and also in the special issue of the *International Journal of Tourism Cities* on the Sharing Economy in a Changing Tourism Ecosystem (von der Heidt, Muschter, Caldicott, & Che, 2019).

In 2019 the study of Byron Shire residents was expanded in partnership with Destination North Coast (DNC) – one of six Destination Networks in NSW - to encompass 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[1]. Of the 1632 respondents across the 12 council areas, 169 (10%) were Airbnb hosts, 320 (20%) were AAPs, and 1143 (70%) were 'other' residents. The findings were published in 12 individual council reports and in an overall 12-Council report (von der Heidt, Muschter, Caldicott, Che, & Corlis, 2020).

2.4 The current research issue: Impacts of STRA on AAPs in the Byron Shire

In recent years, advances in information and communication technology (ICT) and broad-based acceptance of the sharing economy have enabled peer-to-peer accommodation providers, notably Airbnb to wrest market share from traditional accommodation providers. Traditional accommodation providers have a Development Application approval, while STRA providers do not. Hence, calls are growing from community members and AAPs for governments to regulate non-traditional/non-registered STRA more effectively.

However, governments around the world are grappling with how best to regulate Airbnb, and other forms of STRA, e.g. HomeAway/Stayz. Presently, no state-wide regulation for STRA, including Airbnb, exists. Acknowledging the gap, in June 2018 the NSW Government announced a policy for STRA in NSW. Through a discussion paper titled 'A new regulatory framework' released in August 2019, the NSW government (2019) invited feedback from interested parties. The proposed whole-of-government framework includes a mandatory code of conduct for STRA. Submissions closed on 11 September 2019. As of the time this report was compiled, the results of the consultation process had not been published and the framework had 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 investment properties.

The nature and extent of the impacts of STRA on the range of AAPs (e.g. hotels, bed & breakfast accommodation, backpackers and hostels) is poorly understood and is under-researched, especially in regional Australian tourist destinations such as Byron Shire. Further, the impacts of the growing STRA sectors on the AAPs are also unclear, as are the AAPs' views on the current regulatory regime of STRA.

The research presented in this report sought to help address these knowledge gaps through the following two objectives:

[1] The 14th DNC council, Lord Howe Island, was excluded on the basis of its small population (<400) and existing tight restrictions on tourist arrivals.

1. To determine the size, main attributes and development patterns of Airbnb, and AAPs in the Byron Shire and provide a descriptive summary.
2. To determine AAP attitudes regarding impacts of STRA (including Airbnb) on their business through pilot interviews and a survey.

The research helps inform governments' decision-making pertaining to regulation of Airbnb and other similar sharing economy accommodation platforms. Notably, it informs Byron Shire Council's decision-making around STRA caps for non-hosted properties. The next section provides findings in relation to the first objective. The remainder of the report relates to the second research objective, i.e. Phase 1 (interviews) and Phase 2 (survey of AAPs).

2.5 Approved accommodation providers operating in the Byron Shire

2.5.1 Profiling STRA (Airbnb) in the Byron Shire area

To understand the main attributes and development patterns of Airbnb in the Byron Shire (Objective 1), the researchers retrieved Byron Shire Airbnb listings from Inside Airbnb[2] and BnbGuard[3] - two Airbnb/STHL data reporting services in Australia.

- Inside Airbnb (2019a) holds records for Airbnb listings in the Byron Shire from 2016. Airbnb listings increased 195% over the last three years - from 1172 at the end of 2016 to 3452 at the end of 2019. According to Inside Airbnb, 79% of the listings at the end of 2019 were for entire houses or apartments with an estimated occupancy of 20%, meaning that these houses were only rented by guests for around 73 nights of the year. Among all Airbnb listings, 56% of the properties were available all year around. Furthermore, 57% of individual Byron Shire Airbnb hosts had multiple listings. For example, 578 STRA properties are managed by 20 mega hosts or intermediaries, on behalf of the property owners. The top three agents are: 'A Perfect Stay' with 135 listings, 'Byron Bay' with 75, and 'North Coast Lifestyle Properties' with 48 listings. This indicates that agents are managing properties on behalf of property owners. According to Inside Airbnb, the next three hosts were holding between 32 and 42 listings followed by another six hosts holding between 16 and 26 listings each. An overview/screenshot of the Airbnb listings in the Byron Shire area from Inside Airbnb is provided in Appendix 1.
- BnbGuard identifies 3,684 unique STRA addresses, including Airbnb and Homeaway (formerly Stayz), across the Byron Shire in November 2019. An overview of the STRA listings in the Byron Shire area from BnbGuard is provided in Appendix 2.

2.5.2 Approved accommodation providers in the Byron Shire

A database of approved accommodation businesses in the Byron Shire including contact details of each provider was created by searching various accommodation platforms/websites. At a later stage the overview, including 115 AAPs, was compared with the 2019 Accommodation Audit provided by the Byron Shire Council Tourism Department.

The Accommodation Audit provides the type and number of properties, and bed spaces (in %), in the Byron Shire from 2008 and 2019. As can be seen in the Audit, when combining the numbers of AAPs, including Hostels, Caravan Camping Parks, Resorts, Hotels and Guesthouses, the numbers decreased from 106

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

businesses in 2008 to 81 businesses in 2019. In contrast, Holiday Houses and Private/Home stays significantly increased from 400 in 2009 to 2573 in 2019. The number of Holiday Apartments saw only a minimal increase from 615 in 2008 to 671 in 2019. It is assumed that some of these listed Holiday Apartments fall under the category of AAPs. However, that information was not provided in the Council's Accommodation Audit.

Table 1 - Accommodation type and number of properties in the Byron Shire from 2008 and 2019

Accommodation Type	Number of Properties (2019)	Number of bed spaces (2019)	Total properties % (2019)	Total bed spaces % (2019)	Number of Properties (2008)	Number of Bed Spaces (2008)	% change in the number of bed spaces by town and village from 2008 to 2019
Hostels/Backpackers	10	1751	.5	8	11	1178	32.74%
Caravan Camping	13	5318	.5	24	13	5255	1.19%
Resorts	2	800	.4	4	9	949	-15.70%
Holiday Apartments	671	2846	20	13	615	2885	-1.36%
Hotels/Motels	29	1096	.8	5	25	890	23.15%
Guest Houses	27	228	.8	1	48	335	-31.94%
Holiday Houses	1998	8836	60	40	393	2473	257.30%
Private/Home Stays	575	1150	17	5	7	96	1097%
TOTAL	**3325**	**22,025**	**100%**	**100%**	**1121**	**14061**	**56.63%**

Source: Byron Shire Council Accommodation Audit 2019

The Australian "Average Occupancy Rate" for approved accommodation providers is 74% (77.4% for capital city regions, 64.5% for regional areas) (see Figure 1). In NSW, the "Average Occupancy Rate" in 2018/19 was 78%, a decrease of 1.4% over the year 2017/18. For further details, see https://www.tra.gov.au/Economic-analysis/Australian-Accommodation-Monitor/aam-2018 .

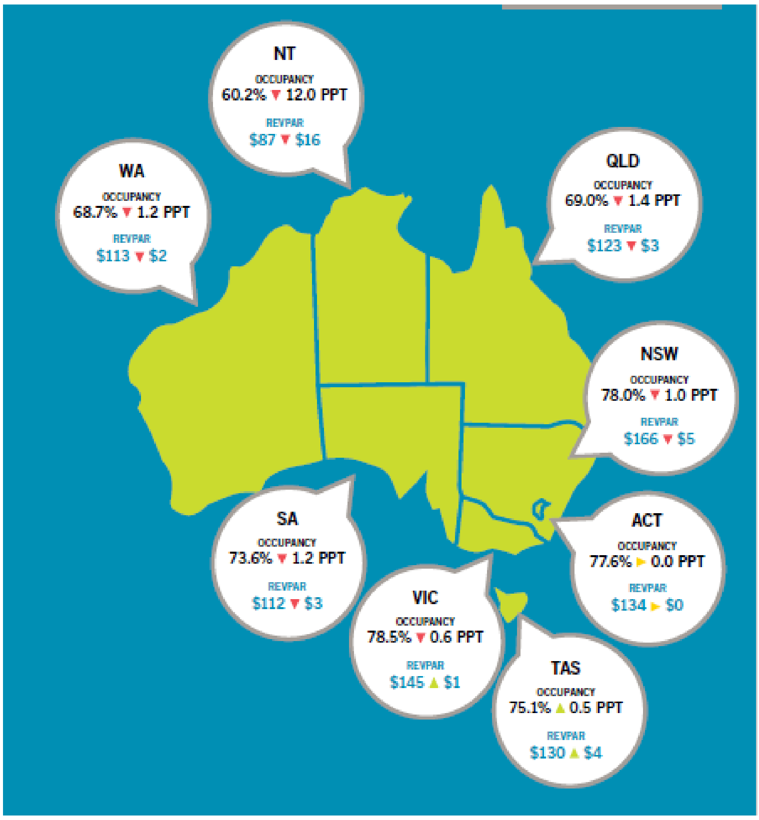

Figure 1 – Australian Accommodation "Average Occupancy Rates" – YE June 2019
Source: https://www.tra.gov.au/Economic-analysis/Australian-Accommodation-Monitor/aam-2018

According to data provided by Destination Byron, the hotels, serviced apartments and holiday parks in Byron Shire are only achieving annual occupancy rates in the mid to high 60s%, low for a heavily touristic region. By contrast, Sydney's hotels achieve 87% occupancy, Melbourne 86%, Gold Coast 72%, Cairns 84%, and Hobart 79%. The occupancy rate of around 66% for AAPs in Byron Shire is on par with that for the wider Northern NSW region (destinationbyron.com.au, newsletter June 2019).

3 Phase 1 (Interviews)

3.1 Interview design

To start addressing the second research objective (explore key informants' views about the impacts of STRA on AAPs), semi-structured, in-depth interviews were conducted with seven key informants to obtain views regarding impacts of STRA, including Airbnb, on AAPs. The interviewees included current and former Byron Shire owners and/or managers of an approved accommodation business; representatives from regional destination marketing organisations, a residents' organisation and an accommodation association; and a Byron Shire councillor.

In accordance with SCU human research ethics requirements, formal consent to be interviewed was obtained from all interviewees prior to the interview. Interviews conducted by one member of the research team were preceded by a briefing in which the interviewer described the interview purpose. In administering the questions, a reflective approach (active listening and appropriate probing) was used to gain insight into the interviewee's perspectives.

The following main issues (research questions) were explored in the key informant interviews:

1. Changes in the accommodation sector within the Byron Shire (particularly in Byron Bay) over the past five years
2. The positive and/or negative impacts or benefits of Airbnb in the Byron Shire
3. The major threats/challenges to the approved accommodation industry over the next few years
4. Solutions for overcoming some of the challenges/concerns resulting from the growth of Airbnb that AAPs in the Byron Shire are facing
5. Opportunities/advantages for AAPs in the Byron Shire from the growth of STRA/Airbnb
6. Perceptions of what the NSW government and accommodation organisations/associations are doing to support AAPs.

Finally, we asked our key informants what they thought would be the most important questions to ask AAPs operating in the Byron Shire regarding STRA/Airbnb in our forthcoming survey.

The interviews in which key informants provided rich insights into the issues faced by AAPs were transcribed, coded and then analysed using thematic analysis through a step-by-step process.

3.2 Interview data results

The interviewees shared their perspectives on changes in in the accommodation sector within the Byron Shire (particularly in Byron Bay) over the past five years. They all noted the explosion in STRA, particularly Airbnb, listings. This proliferation of STRA has led to an oversupply of visitor accommodation, an increase in the younger/partying demographic, and increased competition for AAPs. For AAPs, the boom in STRA through platforms such as Airbnb and Homeaway has led to decreased occupancy rates, prices, and yields. Airbnb has also increased expectations on the part of customers. Management rights companies are also being impacted as property owners remove properties from rental pools. AAPs feel they are on an uneven playing field as they are subject to regulations and commercial fees that Airbnb properties are not subject to. According to interviewees, the explosion in short-term rental properties around the Shire has led to increased numbers of visitors and congestion, although the southeast Queensland drive/day-tripper market also contributes to the latter.

Interviewees shared their views of the positive and negative impacts of Airbnb in the Byron Shire. On the positive side, the resulting increased visitor numbers and overnight visitation yield economic benefits. Visitors can meet local Airbnb hosts. Airbnb properties also fill the gap in accommodations for the needs of these visitors without requiring additional high-rise developments and specifically provide properties such as whole houses and multiple dwellings for multi-generational families and other large groups that most traditional AAPs cannot provide. On the negative side, the growth of Airbnb listings has been connected to a decline in the availability of long-term rentals. Due to the lack of management, neighbours have been disturbed by parties of Airbnb guests. AAPs specifically have seen a decrease in demand and occupancy rates and have experienced the psychological impact of potentially losing their businesses, capital asset value, and investment that they have spent years building up.

Interviewees saw the major threats or challenges for the AAP industry as the unlevel playing field/competition vis-a-vis Airbnb. AAPs have to pay commercial Council rates, GST, insurance, etc. that STRA operators do not have to. The threat is particularly severe for smaller accommodation businesses such as B&Bs and farm stays that do not have huge budgets for marketing and operations.

Interviewees provided insights into possible solutions for overcoming some of the AAPs' challenges/concerns resulting from the growth of Airbnb listings in the Byron Shire. While it would be unrealistic as well as economically problematic to impose a blanket ban on STRA (including Airbnb), the interviewees suggested lessening costs/regulations on AAPs or increasing them on the STRA properties in order to level the playing field. They also noted that Byron Shire and Byron Bay in particular is a special case and should have some exclusion to state and national rules. Interviewees held differing opinions on a registration system which could better regulate STRA, but alternately provide currently unregulated properties with a false sense of legitimacy. Existing legislation and regulations though do need to be enforced.

Interviewees provided their perceptions of what government and accommodation organisations/ associations are doing to support AAPs. These perceptions were largely negative as most interviewees felt there was a lack of support from local and state government. At the NSW state level, interviewees noted there is a conflict of interest with Destination NSW and government ministers being involved with STRA and Airbnb specifically. State and national tourism organisations mainly want to drive more visitation to Byron. Some interviewees felt that AAPs do not have much of a voice as small operators are in the minority in such organisations. Interviewees also mentioned that AAPs do not get support at the local level (i.e. from the Byron Shire Council). It was stated by some interviewees that the industry organisation, Accommodation Association of Australia, mainly lobbies, but cannot provide any financial support to AAPs.

4 Phase 2 (Survey of AAPs)

4.1 Survey research design

The research team leveraged the survey instrument from the 2018 Byron Shire study as a base for the new survey. The following survey questions were retained or adjusted from the Byron study:

- Identification of resident status
- Preferences for day limits (rental caps) on STRA
- Preferences for measures to improve regulation of the STHL sector*.

The research team then drew on information, issues, themes, and suggested survey questions from the interviewees to develop questions for the Approved Accommodation Provider (AAP) survey. Several new questions related to AAPs and their businesses were added to capture the following information:

- Identification of the approved accommodation provider
- The particular accommodation sector of operation - the type and capacity of the accommodation
- The main visitor type of the accommodation
- Building classification and condition of consent
- Perceived positive and negative impacts of STRA (primarily Airbnb) on the accommodation sector and AAP operations across the Shire*
- Performance of the accommodation businesses over the last two financial years
- Consideration of changes to the accommodation business*
- Change of personal circumstances due to the growth of STRA across the Byron Shire*
- Membership and support of related tourism and accommodation associations
- The platforms on which the accommodation business is advertised.

Attitudinal responses indicated with an asterisk (*) were measured using a five-point Likert scale (1=strongly disagree to 5=strongly agree).

The online survey was administered within Qualtrics. It was reviewed and pre-tested by the research team, other academics from SBAT, several accommodation stakeholders, and two representatives from Byron Shire Council. Pre-test feedback was incorporated in successive revisions to the survey.

The online survey was distributed on 6 November 2019. The research team worked with the University's media office to issue a media release (Southern Cross University, 2019), with a link to the survey. Other media activities included online and print articles in the local newspapers (The ECHO & Byron Shire News), and two radio interviews. Of the estimated 115 AAPs in the Byron Shire, around 25 are members of the Byron Hinterland Collective and around 50 are members of Destination Byron. Each of these two associations contacted their members directly by email, inviting them to participate in the survey. In addition, an SBAT team member called AAPs to inform them about the survey and the importance of participation. Response rates were tracked on a weekly basis.

The plan was to have the survey link available for four weeks from the starting date. However, due to a hacking attack which led to duplicate responses from ineligible individuals, the survey was closed on 5 December 2019. A duplicate survey (copied from the original one) was created on the same day to make sure eligible respondents could still participate in the study. Due to the hacking and subsequent delays, the survey was extended for a further three weeks and closed on 1 January 2020.

Data from the two surveys were merged in Qualtrics and transferred into SPSS data analysis software. A total of 105 responses were received (96 from the first survey and 9 from the second). After data screening and cleaning, 57 responses were retained for data analysis. The other 48 responses were deleted as they were from an ineligible participant (1), were incomplete responses with an unacceptable volume of missing values (17), and were duplicate responses from the hacking attack (30).

4.2 Data analysis

Descriptive analysis was undertaken, and frequency tables were produced for each question to profile the respondent (and their affiliated property) characteristics, and their attitude towards STRA/Airbnb impacts on their accommodation business and existing policies. Means and standard deviations were included when variables were measured at an interval level.

(a.) After the preliminary steps from the descriptive results, independent sample t-tests were conducted in order to see if there were significant difference between respondents from the various postcode areas on their perception of STRA impacts, performance metrics, changes in business, changes in business circumstances, preferred maximum rental cap, and preferences to regulate STRA.

The collapsed-data method was used for several variables to highlight patterns in the data and to eliminate categories with only a few cases. Specifically, the responses from the five postcodes areas were merged into two groups: 2481 (Byron Bay - as the high-density tourist area) and the other four postcodes (low density tourist areas). Homogeneity of variance was tested through Levene's test, which showed that variances in populations are roughly equal.

(b.) A one-way within-subjects (or repeated measure) ANOVA was conducted in order to compare if there was any significant difference between respondents from different accommodation sectors on the perceptions of Airbnb impacts, performance metrics, changes in business, changes in business circumstances, preferred maximum rental cap, and preferences to regulate STRA.

The collapsed-category method was used again - accommodation types were collapsed into five groups based on the nature/characteristics of the accommodation. Homogeneity of variance were tested through Levene's test, when Levene's homogeneity of variance is violated Brown-Forsythe was utilized along with Tukey's HSD post-hoc procedures.

(c.) A one-way within-subjects (or repeated measure) ANOVA was conducted in order to compare if there was a significant difference between respondents with different numbers of rooms/size of accommodation on the perceptions of Airbnb impacts, performance metrics, changes in business, changes in business circumstances, preferred maximum rental cap, and preferences to regulate STRA. Homogeneity of variance were tested through Levene's test, when Levene's homogeneity of variance is violated Brown-Forsythe was utilized along with Tukey's HSD post-hoc procedures.

5 Key survey data results

After data cleaning, a valid data set of 57 survey responses was analysed. Of these 57 responses, 52 respondents answered all questions, while five answered the minimum first 16 questions which the researchers deemed necessary in informing the study objectives. Not all survey questions had a forced response which can explain the different numbers of respondents to the survey questions.

5.1 Sample profile of AAPs

Of the 57 respondents, 23% were owners of the accommodation property, 40% were owners and also managers of the property, and 33% were managers of the property. One respondent specifically was the operations manager, while another was the manager and lease holder. Most (82%) of the 57 AAP respondents were operating their primary accommodation property within the Byron Bay postcode area (see Table 2). Almost all AAPs (53, or 93% of respondents) indicated that they also reside in the Shire.

Table 2 - Respondent postcode area for the primary accommodation property

Postcode	%, *n=57*	Postcode areas
2479	*5.3*	Bangalow, Binna Burra & surrounding areas
2480	*1.8*	Byron Hinterland (e.g. Federal, Rosebank & Nightcap Ridge)
2481	*82.5*	Byron Bay & surrounding areas (e.g. Broken Head, Ewingsdale & Suffolk Park)
2482	*3.5*	Mullumbimby & surrounding areas
2483	*7.0*	Brunswick Heads & surrounding areas

Most (75%) of respondents have been operating their AAP for over ten years (see Table 3). The next largest group of respondents stated that they commenced operation between 2000 and 2009.

Table 3 - Year of commencement of the accommodation business

	Frequency (*n=57)*	***% of properties***
Period of years		
Before 1980	1	*2*
1980 to 1989	10	*17*
1990 to 1999	11	*19*
2000 to 2009	21	*37*
2010 to 2019	14	*25*

Of all the accommodation businesses, 47% had a building classification Class 1b[4], 19% had a Class 3[5], while 33% of respondents stated that they did not know what the building's classification was. Be it coincidence or not, the latter percentage is identical with the 33% of respondents who stated that they are managers of the business. Hence, they may simply not be privy to this knowledge. Only 38 out of the 57 AAPs responded when asked if there were any conditions of consent restricting the numbers of guests and/or operation of the property. A third (33% of respondents) stated that the business had restrictions, 25% said there were no restrictions, while 9% had no knowledge regarding restrictions.

As can be seen in Table 4, the accommodation type varied from B & B (23%), Serviced Apartment (16%), Guesthouse (12%), Motel/Motor Inn (12%), Resort (12%), Backpacker/Hostel (7%) or Rural Tourism Facility (7%). The largest proportion (35%) of accommodation businesses provide one to five rooms, followed by 6-15 rooms (26%), 16-30 rooms (24%), 31 to 50 rooms (3%), and over 50 rooms (10%).

Table 4 - Sector of the accommodation business

Accommodation type	**Frequency (*n=56)***	***% of properties***
Bed and Breakfast	13	*23*
Serviced Apartment Hotel/Self-contained apartments	9	*16*
Guesthouse	7	*13*
Motel / Motor Inn	7	*13*
Resort	7	*13*
Backpacker / Hostel	4	*7*
Rural tourist facility	4	*7*
Farm stay / Nature Retreat	3	*5*
Hotel / Boutique Hotel	2	*4*

The AAPs were asked to select and rank their top five out of nine visitor types for the last 12 months. Table 5 shows the results. The majority of businesses had a mix of visitor types as guests in their accommodation properties. In the ranking, travelling couples (63%) and travelling families with dependent children (21%) were the major markets (Rank 1) for most businesses. All AAPs ranked travelling couples under their top five guest types. Solo females were ranked under the top five guest types by 75% of AAPs; solo males by 68%, and leisure groups by 65%.

[4] Class 1b (e.g. total floor area less than 300 m^2 and a maximum of 12 people, or several single dwellings used for short-term rental accommodation).

[5] Class 3 (e.g. a commonplace of long term or transient living for several unrelated persons such as a hostel, backpackers' accommodation or residential part of a hotel, motel etc.).

Table 5 - Importance of visitor type staying in the accommodation business

Visitor type		Rank 1 (%)	Rank 2 (%)	Rank 3 (%)	Rank 4 (%)	Rank 5 (%)	Overall % *n=57*
Backpacker travellers*	*(n=10)*	9	3	-	-	5	17
Business event groups	*(n=19)*	-	2	14	11	7	33
Leisure groups	*(n=37)*	2	17	16	11	19	65
Solo female travellers	*(n=43)*	2	21	25	17	11	75
Solo male travellers	*(n=39)*	-	9	23	23	14	68
Travelling couples	*(n=57)*	63	25	3	7	2	100
Travelling families with children	*(n=32)*	21	20	5	9	2	56
Travellers with disabilities	*(n=7)*	-	-	3	2	7	12
Others**	*(n=4)*	3	2	2	-	-	7

* Including Working Holiday Makers
** e.g. specific event: Anniversaries, weddings, music festivals etc.

5.2 Perceived effects of STRA growth on the Byron Shire accommodation sector

5.2.1 Impacts of STRA (primarily Airbnb) on the accommodation sector

Respondent perceptions of the following five impacts of STRA (primarily Airbnb) on the accommodation sector - ranked by mean – are presented in Table 6. The majority of all respondents believed that the growth of STRA (Airbnb) has led to an oversupply of tourist accommodation in certain parts of the Byron Shire (88%), created an unequal playing field for AAPs (86%), and also decreased future commercial viability of approved accommodation businesses (88%).

Table 6 - Impacts for the accommodation sector

		Overall agreement (%), *n=57*		
The growth of STRA affects the accommodation sector in the following ways ...	**Mean**	**Disagree***	**Neither**	**Agree**
1. Further increases an unequal playing field for AAPs	4.40	*9*	*5*	*86*
2. Leads to an oversupply of tourist accommodation in certain parts of the Byron Shire	4.39	*5*	*7*	*88*
3. Decreases future commercial viability of approved accommodation businesses	4.37	*7*	*5*	*88*
4. Ensures greater variety in accommodation options for tourists	3.23	*26*	*21*	*53*
5. Increases the real-estate value for approved accommodations	2.65	*49*	*25*	*26*

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

5.2.2 Impacts of STRA on the performance of the accommodation business

Respondents were asked if the growth of STRA has impacted the performance (occupancy rate, average net rate, and net revenue) of their accommodation business over last two recent financial year periods: 2017/18 compared to 2016/17 and 2018/19 compared to 2017/18.

Of the 56 AAPs responding to the question regarding changes on the occupancy rate of the business, 44 (79%) agreed that they have noticed a change, whereas 12% did not notice any changes, and 9% were not aware of any changes. The changes of occupancy rate indicated by the 44 respondents can be seen in Table 7. Over both comparative time periods the occupancy rates decreased for over 80% of all 44 businesses who reported changes. The number of respondents experiencing declining occupancies was higher in the 2017/18 to

2018/19 period than in the previous year. Further analysis shows that accommodation businesses with over 50 rooms had a significantly higher occupancy rate than AAPs with 1-5 rooms.

Table 7 - Impacts on the performance of the accommodation business – Occupancy rate*

	Decrease			Increase		
Period of change	**< -40% (%)**	**-21 to -40% (%)**	**0 to -20% (%)**	**1 to 20% (%)**	**21 to 40% (%)**	**over 40% (%)**
2017/18 compared to 2016/17	2	28	53	9	5	2
2018/19 compared to 2017/18	7	27	57	5	2	-

* *n=44*

Of the 52 AAPs responding to the question regarding changes on the average net rate of the business, 42 (81%) said that they have noticed a change, whereas 19% did not notice any changes. The changes of average net rate reported by these 42 respondents can be seen in Table 8. Over both comparative time periods the average net rate decreased for the majority of these 42 AAPs. The number of respondents noting a decrease in average net rate was higher in the 2017/18 to 2018/19 period (84%) than the year before where 77% of all 42 respondents experienced a decrease. Further analysis shows that within the group of businesses experiencing an increase in average net rate, backpackers and hotels had a significant higher increase than bed and breakfast, guesthouse, motel, and serviced apartment providers.

Table 8 - Impacts on the performance of the accommodation business – Average net rate*

	Decrease			Increase		
Period of change	**< -40% (%)**	**-21 to -40% (%)**	**0 to -20% (%)**	**1 to 20% (%)**	**21 to 40% (%)**	**over 40% (%)**
2017/18 compared to 2016/17	-	10	67	17	2	2
2018/19 compared to 2017/18	-	17	67	10	2	2

* *n=42*

Of the 51 AAPs responding to the question regarding impacts on the net revenue, 42 (82%) agreed that they have noticed a change in the net revenue, whereas 18% did not notice any changes. The percentage changes of average net revenue that these 42 respondents reported can be seen in Table 9. Over both comparative periods the net revenue decreased for over 80% of respondents. More respondents (92%) indicated a decrease in net revenue in the 2017/18 to 2018/19 period than in the year before where 84% of all 42 respondents saw a decrease. Further data analysis reveals that within the group of businesses experiencing an increase on the net revenue, AAPs with 'over 50 rooms' (resorts & backpackers) reported a significantly higher increase of net revenue than AAPs with 1-5 rooms did.

Table 9 - Impacts on the performance of the accommodation business – Net revenue*

	Decrease			Increase		
Period of change	**< -40% (%)**	**-21 to -40% (%)**	**0 to -20% (%)**	**1 to 20% (%)**	**21 to 40% (%)**	**over 40% (%)**
2017/18 compared to 2016/17	-	24	60	12	-	5
2018/19 compared to 2017/18	7	22	63	7	-	-

* *n=42*

5.2.3 Consideration of implementing changes to the business

All 57 AAPs responded to the question asking if they considered implementing changes to the accommodation business over the last 12 months. As can be seen in Table 10, 45% of respondents agreed that they had considered to repositioning the business to cater to a new target market. Further considerations to upgrade the accommodation business through renovation or selling the business drew agreement respectively from 58% and 33% of respondents. The prospect of considering legal steps to protect the business was nearly evenly split between Agree (25%) and Disagree (28%) although most respondents were neutral (47%) to this idea. Closing down the business but keeping the property was a least preferred option, with 63% of respondents disagreeing. However, AAPs managing farm stays and rural tourist facilities were most likely to consider closing down the business.

Table 10 - Considerations to implement changes to the accommodation business

	Overall agreement (%), *n=57*			
Over the last 12 months I have considered...	**Mean**	**Disagree***	**Neither**	**Agree**
1. To upgrade/renovate the accommodation	3.46	*23*	*19*	*58*
2. To reposition the business, e.g. to target a different type of guest	3.32	*23*	*32*	*45*
3. To take legal steps to protect the business	2.96	*28*	*47*	*25*
4. To sell the property as a going concern	2.91	*37*	*30*	*33*
5. To close down the business but keep the property	2.42	*63*	*18*	*19*

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

5.2.4 Changes in circumstances for AAPs

AAPs were asked about the extent to which the growth of STRA (primarily Airbnb) has changed their work-life circumstances. The results are presented in Table 11. The majority of respondents (84%) agreed that they have to work harder in their jobs, and 65% stated that they feel more anxious and stressed working in their accommodation business, leading to 51% saying their job satisfaction decreased. Needing to work outside the business was evenly spread between Agree, Neither, and Disagree, with approximately one-third of responses. Fifty-six percent of respondents disagreed that they felt more satisfied with their life and tellingly, 72% claimed they have less time for family.

Table 11 - Change of circumstances

	Overall agreement (%), *n=57*			
With the growth of STRA my circumstances have changed in the following ways…	**Mean**	**Disagree***	**Neither**	**Agree**
1. I have to work harder in my job	4.23	*5*	*11*	*84*
2. I feel more anxious and stressed	3.68	*19*	*16*	*65*
3. My job satisfaction has decreased	3.40	*24*	*25*	*51*
4. I need to work outside the business to make ends meet	3.02	*33*	*35*	*32*
5. I feel more satisfied with my life	2.28	*56*	*42*	*2*
6. I have more time for family	2.07	*72*	*25*	*3*

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

5.3 Views on the STRA new regulatory framework

As mentioned in Section 2.4, the NSW Government's *Fair-Trading Amendment (Short-Term Rental Accommodation) Bill 2018* is under review. In August 2019 the NSW Department of Planning, Industry and Environment (DPIE) released "A new regulatory framework" for STRA reform via a discussion paper that outlined draft codes for Environmental Policy, Code of Conduct, and Fire Safety.

5.3.1 Agreement with the NSW Government STRA draft codes

When respondents were asked if they considered the codes adequate, 55% of AAPs said that they do not feel that the codes were adequate, whereas 21% were not aware of the codes and 21% did not feel to be in a position to assess the details of the codes. Only 4% of respondents agreed that the codes are adequate.

5.3.2 Perceptions on rental caps on STRA properties in the Byron Shire

The survey captured views of AAPs on the duration of their preferred rental caps for three types of STRA properties: (a) primary residence with host present; (b) primary residence temporarily without host present, and (c) permanently hosted investment properties (see Table 12).

<u>(a) For primary residence properties with host present (***with permanent on-site*** management)</u>
Among all AAPs, 31% of all respondents felt that there should be no restrictions at all for properties *with on-site* management. In other words, these properties could be rented 365 days per year. For *on-site* managed properties, 58% of the AAPs favoured a cap of less than 90 days (including 0 days).

<u>(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)</u>
Among all AAPs, 51% of all respondents favoured a maximum cap of less than 90 days on such STRA rentals, whereas 40% wanted 0-days rental for primary residence properties which are temporarily rented out without a host on site. Only 7% felt that there should be no restrictions at all, meaning that these properties could be rented 365 days per year.

<u>c) For permanently non-hosted investment properties (***without on-site*** management)</u>
Among all AAPs, 66% of respondents wanted full restrictions (*0 days = no STRA*) for investment properties *without on-site management*.

On-site management of STRA is clearly the model preferred by most respondents.

Table 12 - Differences regarding rental caps on STRA*

Day caps per year	365-days (No restriction)	Max. 180-days	Less than 90-days	0-days (Full restriction)	Total
A. For primary residence properties with host present					
Total of respondents *(%)*	*31*	*11*	*40*	*18*	*100*
B. For primary residence properties temporarily without host present					
Total of respondents *(%)*	*7*	*2*	*51*	*40*	*100*
C. For permanently non-hosted investment properties					
Total of all respondents *(%)*	*7*	*5*	*22*	*66*	*100*

* *n=55*

5.4 Perceptions on regulating STRA in the Byron Shire

A majority of respondents supported five of the proposed ways to regulate STRA in the Byron Shire as set out in Table 13. Most of the AAPs (94%) requested appropriate enforcement of non-compliance, and 92% asked for more adequate reporting avenues to lodge complaints of misconduct. The introduction of a bed-tax was perceived as the least important regulation strategy as only around half of the respondents agreed.

Table 13 – Strategies to regulate STRA within the Byron Shire

		Overall agreement (%), *n=52*		
STRA needs to be regulated in the following ways…	**Mean**	**Disagree***	**Neither**	**Agree**
1. Adequate enforcement of non-compliance	4.73	*0*	*6*	*94*
2. Adequate reporting avenues to lodge complaints of misconduct	4.65	*0*	*8*	*92*
3. A mandatory local government operated register for all STRA that provides information to Local or State Government to support regulation (e.g. days of operation, fire safety, insurance)	4.65	*4*	*4*	*92*
4. Application of a business rate for properties used as non-hosted STRA	4.40	*6*	*6*	*88*
5. A potential industry-led register that provides information to Local or State Government to support regulation	3.75	*25*	*8*	*67*
6. A bed tax or levy for all STRA	3.46	*27*	*21*	*52*

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

5.5 Membership in and support of stakeholder organisation

As outlined in Table 14, 39% and 25% of respondents are respectively members of the local organisations, Destination Byron and the Byron Chamber of Industry. On a state/national level, 28% are members of Tourism Accommodation Australia (NSW) and 25% are with Accommodation Association of Australia (AAoA). Just 9% of respondents indicated membership of Australian Residential Managers Association. Nineteen per cent selected 'Other' for memberships including Backpacker Operators Association NSW, Byron Hinterland Accommodation Group Inc., and Destination NSW.

Table 14 - Membership in accommodation-related organisations

Organisation	**%, *n=52***
1. Destination Byron	39
2. Tourism Accommodation Australia (NSW)	28
3. Byron Chamber of Industry	25
4. Accommodation Association of Australia	21
5.The Australian Residential Managers Association	9
6. Others*	19

* e.g. Backpacker Operators Association NSW, Byron Hinterland Accommodation Group Inc., Destination NSW

Respondents were asked if they felt supported by the various stakeholder organisation/association given the increased presence of STRA (primarily Airbnb). As can be seen in Table 15, 20% of AAPs felt sufficiently supported by AAoA, whereas only 12% felt supported by the NSW branch of Tourism Accommodation Australia and by Destination Byron. Ten percent of respondents were satisfied with the level of support from the Byron Shire Council. The agreement of respondents regarding support for all other organisations was under 10%.

Table 15 - Satisfaction with support of organisations

Level of support from	Mean	Overall agreement (%), *n=52* Disagree*	Neither	Agree
1. Accommodation Association of Australia	2.70	*42*	*38*	*20*
2. The Australian Residential Managers Association	2.57	*40*	*51*	*9*
3. Tourism Accommodation Australia (NSW)	2.45	*49*	*39*	*12*
4. Destination Byron	2.40	*52*	*36*	*12*
5. Byron Chamber of Industry	2.26	*52*	*44*	*4*
6. Destination North Coast	2.20	*61*	*31*	*8*
7. Destination NSW	2.20	*63*	*29*	*8*
8. Byron Shire Council	2.06	*66*	*24*	*10*
9. NSW government (DPIE)	1.72	*80*	*20*	*0*

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

6 Platforms used for business promotion

Most (94%) of the AAPs promoted their accommodation business to potential overnight visitors via their business website, 90% also promoted the business on Booking.com and 77% on the Expedia website. Around 20% of respondents listed their accommodation business on the Airbnb platform.

Table 16 - Platforms to promote the accommodation business

Accommodation platform		Rank 1 (%)	Rank 2 (%)	Rank 3 (%)	Rank 4 (%)	Rank 5 (%)	Overall % *n=53*
Agoda	*(n=17)*	-	4	7	16	4	32
Airbnb	*(n=11)*	2	3	2	2	10	21
Booking.com	*(n=48)*	60	19	3	2	-	90
Byronbayaccom.net	*(n=3)*	-	-	-	2	3	6
Expedia*	*(n=41)*	-	35	28	7	2	77
Google Hotel finder	*(n=8)*	-	2	5	2	5	15
Homeaway/Stayz	*(n=5)*	2	3	-	2	2	9
Hotel.com	*(n=8)*	-	-	-	11	3	15
Own Website	*(n=50)*	26	20	33	5	4	94
Others **	*(n=17)*	2	5	7	7	9	32

* including Wotif, Trivago

** e.g. Hooroo, Hostel Word, Instagram, Jetstar, TripAdvisor, Qantas, Word of mouth/direct return

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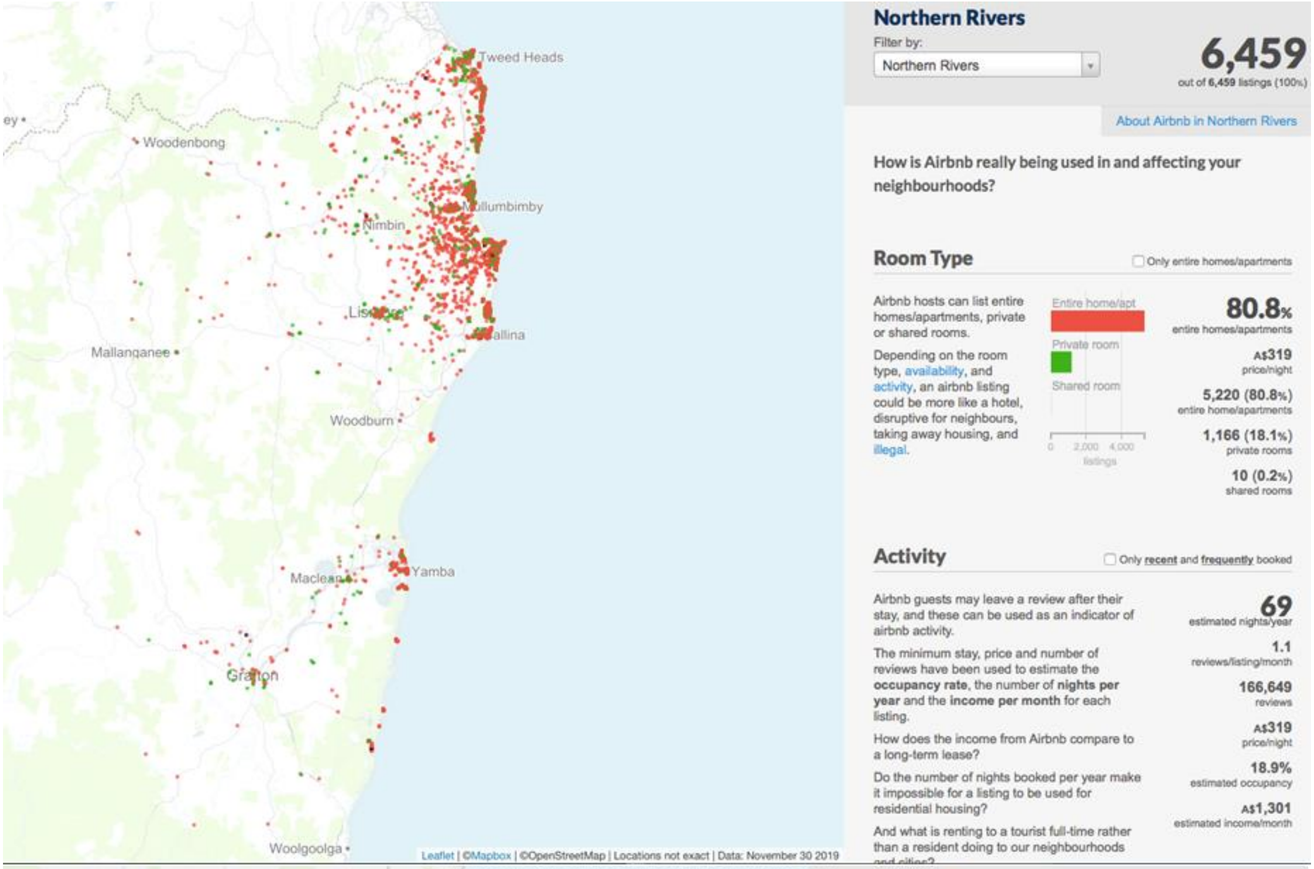
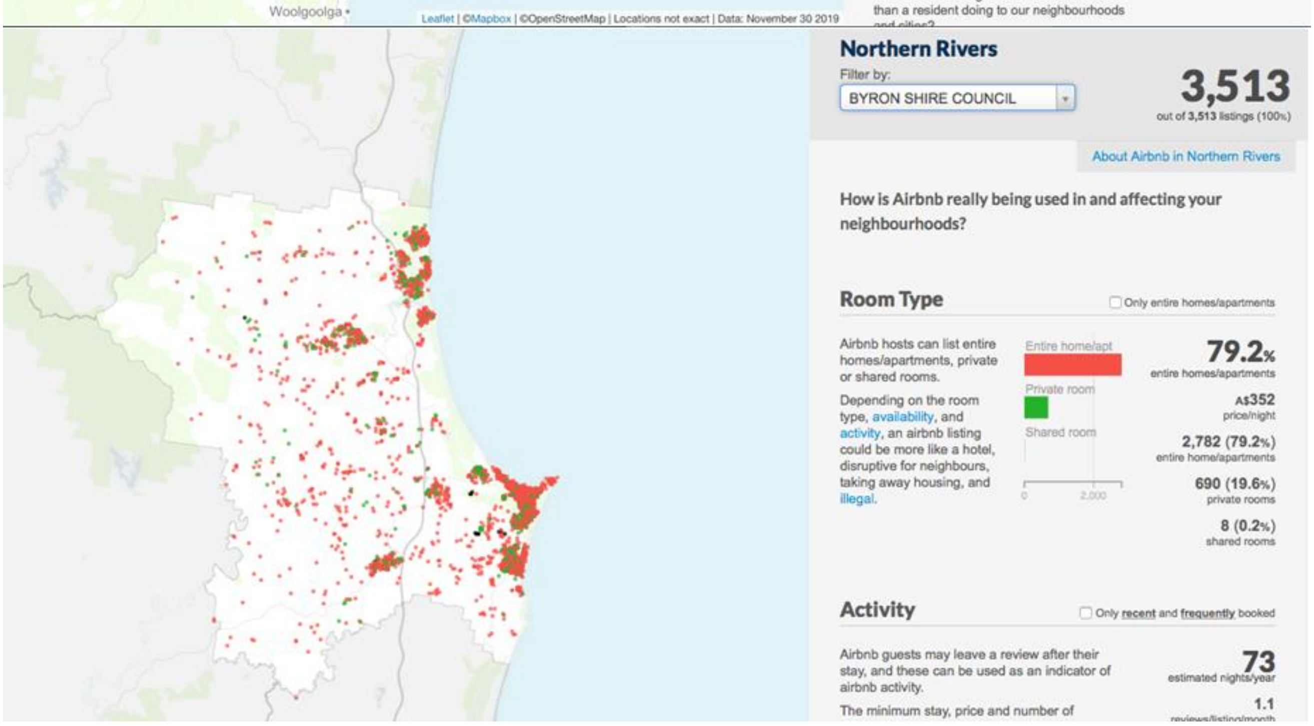
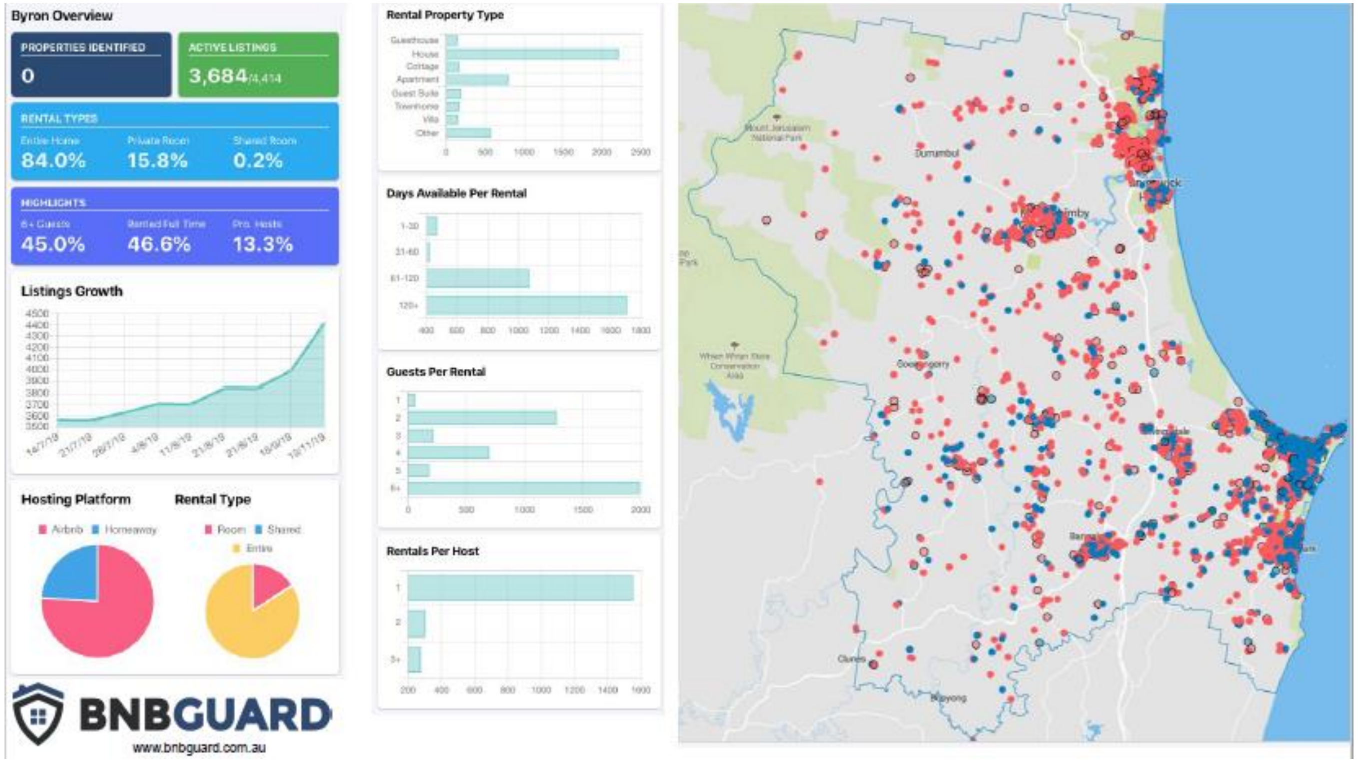
Appendix 1: Airbnb listings in the Northern Rivers (including Byron Shire)[6]





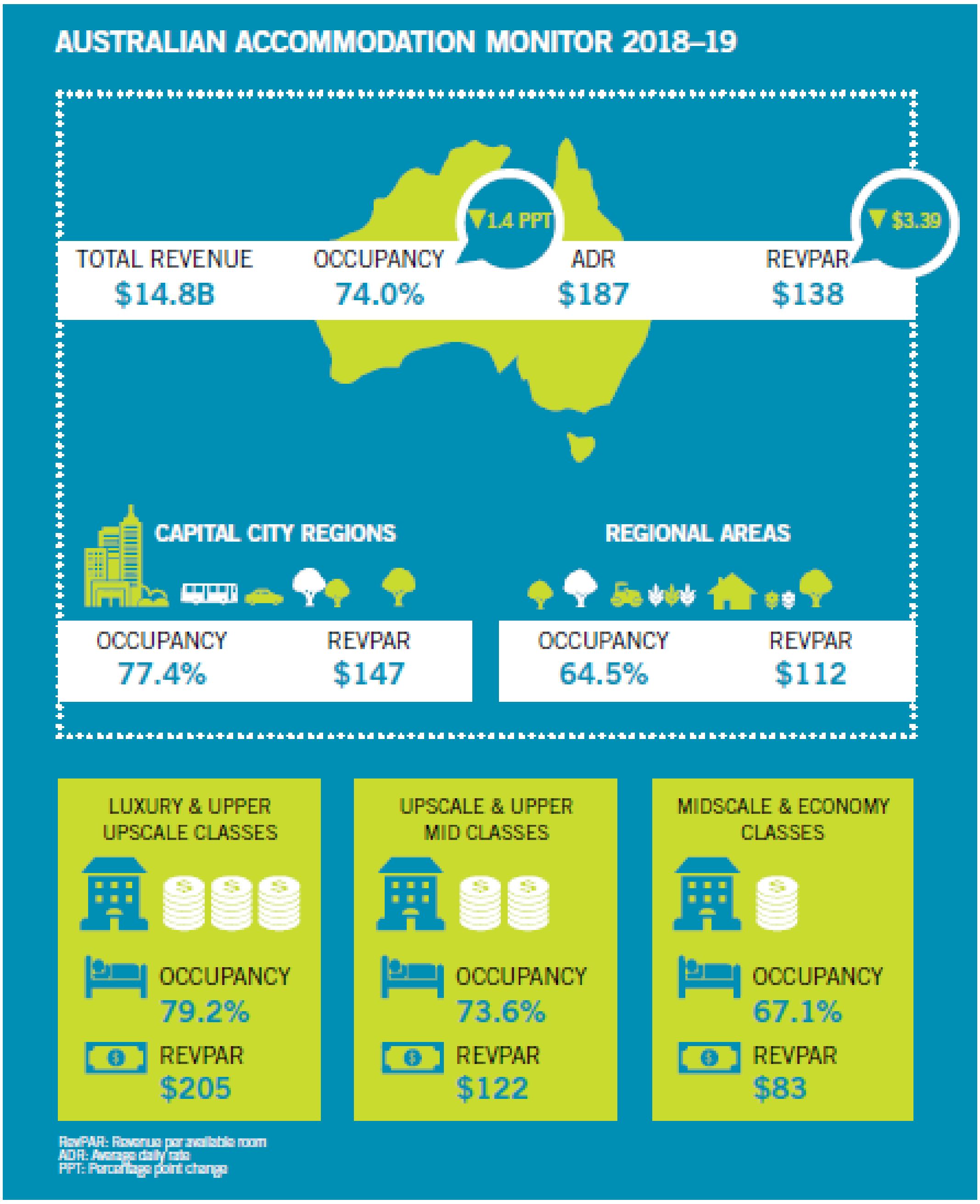
[6] Screenshots from Inside Airbnb, 30 Nov 2019: Inside Airbnb provides data solely on Airbnb property listings. A sample dashboard is available at http://insideairbnb.com/northern-rivers/?

Appendix 2: Airbnb & Stayz listings in the Byron Shire[7]



[7] 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 at: https://bnbguardv2.herokuapp.com/nsw/sydney/suburbs/summary

Appendix 3: Tourism Australia – Australian Accommodation Monitor YE June 2019



Source: https://www.tra.gov.au/Economic-analysis/Australian-Accommodation-Monitor/aam-2018