



Options for Regulating Short-Term Vacation Rentals

This memo is intended to help jurisdiction staff understand the growth of the short-term vacation rental market and regulatory options. Please visit www.21elements.com for more information.

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Executive Summary

The short-term rental industry has grown and evolved at a fast pace in recent years. Once a small, informal part of the economy, it is now larger and more established. Its growth in popularity, coupled with an increase in the *professionalization* of the industry – the emergence of full time rentals and hosts that do not live in the units they are renting – have raised the profile of this issue and led many jurisdictions to consider regulation and taxation.

As cities consider regulatory options, they should:

- 1. Understand the makeup of their own short-term rental market,**
- 2. Attempt to balance potential benefits and potential concerns, and**
- 3. Consider how to build enforcement into policy.**

Understanding the Market

The short-term rental market has various components. A variety of activities fall under the general category of short-term vacation rental, ranging from occasionally renting an extra bedroom to leasing an entire home on a short-term basis year-round. While some cities have



chosen to regulate all rentals the same way, these different types of activities have different potential impacts.

Some of the major questions about the market include:

- 1) Are short-term rentals available occasionally or year-round?
- 2) Are short-term rental owners available on-site to deal with potential problems? And,
- 3) If the short-term rental unit were not being rented, would it be available for year round rental housing?

One of the primary reasons jurisdictions may want to restrict or prohibit year-round short-term rentals is to protect the residential character of single-family neighborhoods. An important factor in this regard is whether the short-term rentals are hosted or not. *Hosted rentals*, or properties with an owner on-site to deal with issues (e.g. renting a bedroom), are less likely to cause problems than *unhosted rentals*, which are properties with no on-site supervision.

Costs and Benefits

When considering regulation, there are several potential benefits of short-term rentals to take into consideration, including additional income for homeowners, hotel (transient occupancy) tax revenue, and increases in goods and services spending. The potential negative effects of short-term rentals include impacts on the quality of life in residential areas, the loss of housing stock, increased rents or tenant evictions, and effects on the hotel industry.

Data

To better understand the short-term rental market in San Mateo County, 21 Elements hired a researcher to collect and analyze publicly available Airbnb data from October 2015¹. Of the 1,330 Airbnb listings, Entire Home and Private Rooms each made up approximately 47 percent of the listings for a total of 94 percent of the listings. Shared rooms made up the remaining six percent. During the third quarter of 2015, over 10,000 people stayed in a short-term vacation rentals in San Mateo County.

San Mateo County At-a-Glance

October 2015 Short Term Rental Market

47% of listings are for entire homes

43% of hosts have multiple listings

\$193 Average price per night

100 Day Number of days the average unit is occupied by a guest

Enforcement

When a jurisdiction is exploring what regulations might appropriate, it is important to consider how policies will be enforced. Some cities have created regulatory regimes that are difficult to enforce. Ultimately, a well-crafted policy is a policy that can be enforced.

¹ Airbnb was chosen because it is the industry leader and its website is most accessible for analysis.

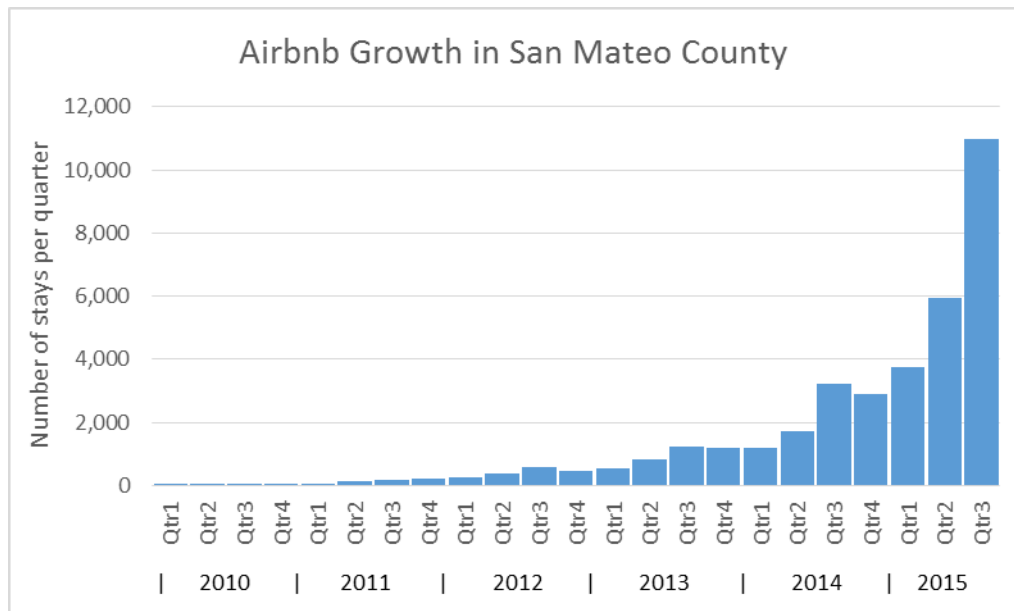
History and Growth of Short Term Rentals

Homeowners have been renting their homes for many years. However, short-term rentals were not a common practice before the Internet because hiring a realtor or brokering property was not practical for most people. This started to change in the mid-1990s when Craigslist created a platform that made it possible for anyone to post a short-term rental listing. In the 2000s, marketplace websites that charged a fee for people to advertise short-term rental units began to appear. These sites did not assist with the day-to-day management, requiring homeowners to field calls and negotiate transactions on their own. They also offered few protections for renters who, upon arrival, may discover properties that were inaccurately described.

In 2008, the industry again evolved with the emergence of companies like Airbnb, Flipkey and Homeaway. Acting as active brokers, these companies charge a commission on each rental, and only pay homeowners after guests arrive, thus reducing fraud and offering a real-time calendar so renters can book instantly. Hosts can now list an extra bedroom or entire home with one of several websites, and visitors can select from a variety of rentals that meet their needs.

Most recently, it has become possible to own a unit, make it available for short-term lease, and not be involved in the day-to-day management at all. Companies like Guest and Pillow provide support services such as cleaning before and after occupancy, greeting guests, price-optimization and facilities management.

The short-term rental industry has become increasingly popular throughout the world and has experienced tremendous growth in recent years. In San Mateo County for instance, there were approximately 82 people who



Source: 21 Elements

used Airbnb for the whole year in 2010. By 2012, the number of users had grown to over 1,000 people. By 2015, more than 10,000 people were using Airbnb every quarter. The graph above shows the growth of Airbnb short-term rentals in San Mateo over the last six years.

Professionalization of Industry

As the industry has matured, there has been a transition away from *casual hosts*, or those hosts renting for a few days or weeks in a given year, to *professional hosts* who rent short-term units year-round. Although it is still common for a homeowner to occasionally rent their home when they are on vacation or an extra room throughout the year, some professionals now buy units so they can rent them as a business. Data from a New York State² study found that as recent as 2010, the majority of hosts were casual hosts. By 2012, 62% were professional hosts. This is supported by two Airbnb surveys that estimated 44-58% of their hosts were professional³. In San Mateo County during October 2015, 80 percent of hosts had units available year-round. It is interesting to note that although many, if not most, hosts are homeowners or casual in their approach to short-term rentals, the majority of revenue is generated by professionals.

San Mateo County At-a-Glance

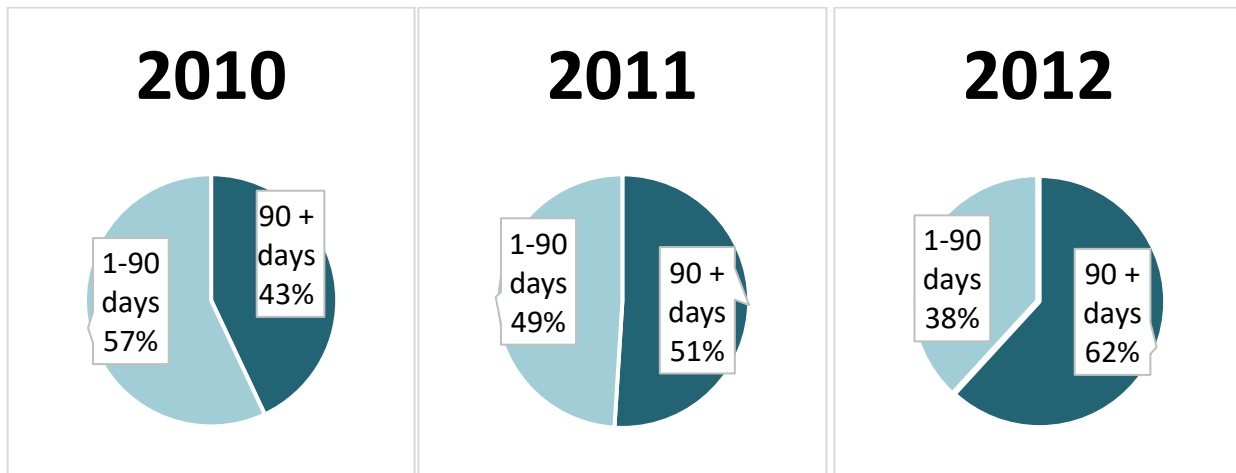
October 2015 Short Term Rental Market

80% of hosts in San Mateo are professional, meaning their homes are available for rental 90+ days per year.

43% of hosts have multiple listings

30 units are listed by the top host for San Mateo County

Casual versus Professional Hosts *Days that units in New York are available per year*



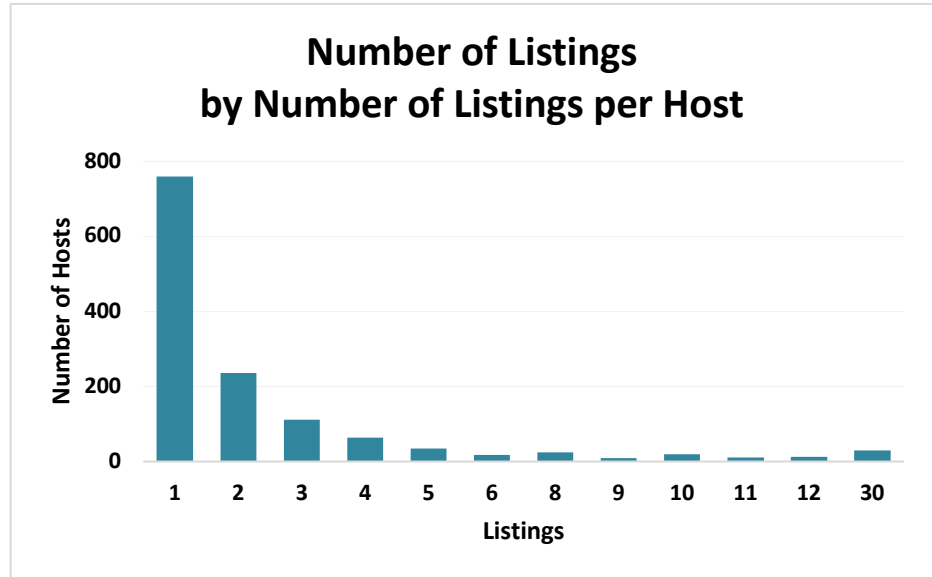
Super hosts, individuals that either own or manage more than three properties, have also emerged. In October 2015, in San Mateo County, the top host had 30 listings on Airbnb and 43 percent of hosts had multiple listings. **While the New York State study found that super hosts made up only six percent of total listings, they were responsible for 86 percent of all bookings**

² As part of an investigation into whether hosts were violating state and local tenancy and tax laws, the New York State Attorney General subpoenaed records. Consequently, the data for New York State is much more robust than for other places.
³ Rosen Consulting Group. 2013. Short-Term Rentals and Impact on the Apartment Market; HR&A Advisors. 2013. Unpublished report for Airbnb on the economic impact assessment of Airbnb rental activities in San Francisco and New York City. Some details are available from the (1) [official press release](#) from Airbnb.com, (2) article discussing results on Forbes.com, and (3) HR&A Advisor's [summary](#) on their client portfolio webpage.



and 37% of revenue.

This new type of host is important to the short-term rental industry because they provide consistent and sizeable income to the companies. In turn, companies more prominently advertise professional host listings on their sites, and may be resistant to police these users.



Types of Rentals

One of the ways to categorize vacation rentals is identify those rentals that are hosted or unhosted. *Hosted rentals* may include just bedrooms or sometimes second units, and have an owner or resident living on the property (some jurisdictions object to second units being rented because they believe they should be part of the regular housing stock). This type of rental has been less of an issue in terms of noise complaints because there is someone living on-site who can respond to any problems that might arise.

Unhosted rentals may include the entire home and sometimes a second unit, that are vacant and do not have an owner or resident living on the property. These types of short-term rentals can be owned by investors who are buying them to rent as a business, or by local homeowners who are away temporarily.

There are also hosts that rent their home as an unhosted rental for corporate retreats, either during the day or overnight.

Hosted	Unhosted
Second Unit Bedroom	Second Unit Entire Unit

It is additionally important to distinguish if units are available for year-round short-term rental or only for a limited time. Units that are rented on a short-term basis year-round will be removed from the jurisdiction’s housing stock as a potential source of local housing.

Benefits and Concerns

Cities across the country are currently working on how best to address the many different activities that make up short-term rentals. While there are no standard guidelines or best practices yet in place, jurisdictions can begin by evaluating and weighing the most common benefits and concerns.

Benefits

Additional Income for Homeowners

Renting an extra bedroom or accessory dwelling unit can be an attractive and flexible option for a homeowner wanting the extra income. Consequently, people who are currently renting units on a short-term basis are often a very vocal constituency. Someone can list their space for as few or as many days as they want, dependent on their schedule and need for supplemental income. By doing so, a homeowner may no longer be required to have a full-time roommate or work a second job, for instance. Additionally short-term rentals can be particularly helpful for those with fixed incomes. In this rental situation, because owners live on-site, any problems that arise can be immediately addressed.

Hotel Tax Revenue

Some short-term rental websites are willing to collect local hotel or transient occupancy taxes from their users, providing additional revenue for cities. Recently Airbnb has agreed to collect taxes on every transaction in Portland, San Francisco and Redwood City.

They then pay the city in a semi-annual lump

sum. Since agreements with Airbnb in Portland and San Francisco went into effect in July and October of last year, respectfully, they have been paid a combined total of \$5 million in transient occupancy taxes. A recent report for the City of Oakland recommended that the city collect the full 14% Transient Occupancy Tax (TOT) and allocate 11% to the Affordable Housing Trust Fund, while additionally requiring full-disclosure on all rental transactions⁴. Based on the most recent data for San Mateo County for 2015, there were about 40,000 rental nights per year, with an average rate of \$193 per night. **Assuming 3 nights per rental, a 10 percent hotel tax in San Mateo County could generate \$2.3 million per year.**

San Mateo County At-a-Glance

\$2.3 million is a conservative estimate of annual hotel tax that could be generated from Airbnb.

Although short-term rental companies were originally outspoken against such agreements, collecting taxes legitimizes their service, which has long-term benefits. Generally, companies have only been willing to provide details on a citywide basis, rather than providing information on revenue from different hosts.

Extra Spending on Goods and Services

In 2012, Airbnb reported that their guests spent an estimated \$56 million and supported 430 jobs in San Francisco⁵. Money is more often spent in neighborhoods that typically do not attract tourists, compared to traditional hotels. However, to accurately understand the benefits for a city, the analysis should also examine what long-term occupancy residents would have spent.

Concerns

⁴ Community Economics. 2015. [Impact of Short Term Rentals on Affordable Housing in Oakland: A Report and Recommendations.](#)

⁵ Airbnb. 2012. Economic Report. <http://blog.airbnb.com/economic-impact-airbnb/>

Loss of Housing Stock Leading to Increased Rents and Evictions

There is a growing concern that the short-term rental market is additionally burdening stressed housing stocks, and contributing to rising rents and evictions. In San Francisco, a 2015 study

San Mateo County At-a-Glance

2,100 - Homes built from 2010-2014

1,071 - Homes currently off housing market due to short-term vacation usage

found that in some neighborhoods landlords earned more in the short-term rental market than they would have in the long-term rental market⁶. While these units made up a small percentage of the overall rental housing supply, the neighborhoods studied that had the highest number of professional hosts also had high numbers of evictions. Looking specifically at rent

impacts, an unpublished study, by University of British Columbia Professor Thomas Davidoff, analyzed publicly available data and found that enough housing stock was removed from San Francisco to increase the average monthly rent between \$19 and \$76⁷. However, it is difficult to confirm whether people are being evicted so their units can be used for short-term rentals and whether these are isolated cases or an indication of a larger problem.

Between 2010 and 2014, 2,100 new homes were built in San Mateo County. According to data collected during this study, there were 1,071 entire homes or apartments listed on Airbnb in October 2015 that were not on the housing market because they were being used full time for short term rentals, which is half of the new housing supply created in the last four year.

Effects on the Hotel Industry

Concerns have been raised that the popularity of short-term rentals could decrease hotel usage, and that such a decrease might offset any increase in hotel or occupancy taxes. Because San Mateo County has an 85 percent hotel occupancy and some of the highest hotel rates in the country (averaging \$270 per night), a noticeable decrease in hotel usage is not expected regionally. However, this is still important to keep in mind.

Neighborhood Impacts Concern

For the same reasons that zoning codes would not permit a hotel in a residential neighborhood, there are concerns about short-term vacation rentals impacting the ambiance and quality of local residential districts. While the vast majority of short-term rentals occur without a problem, they can cause impacts to neighborhoods. Visitors, for instance, often book rentals for vacations and celebrations, which can conflict with the residential character of the neighborhoods in which they are located. Over-crowding, late hours and parties can result in disruptions to long-term residents and can result in noise violations, safety concerns and impacts to parking. This is particularly problematic for entire home or apartment rentals because they are routinely unhosted. If a problem arises at an unhosted property, there is nobody living on-site to prevent or control issues and respond in a responsible manner.

⁶ Budget and Legislative Analyst. 2015. Analysis of the Impact of Short-term Rentals on Housing. City and County of San Francisco Board of Supervisors.

⁷ LAANE. 2015. LAANE Policy Brief: Short Term Rentals and Los Angeles' Lost Housing. http://www.laane.org/wp-content/uploads/2015/08/Short-Term_RentalsLAS-Lost_Housing.pdf

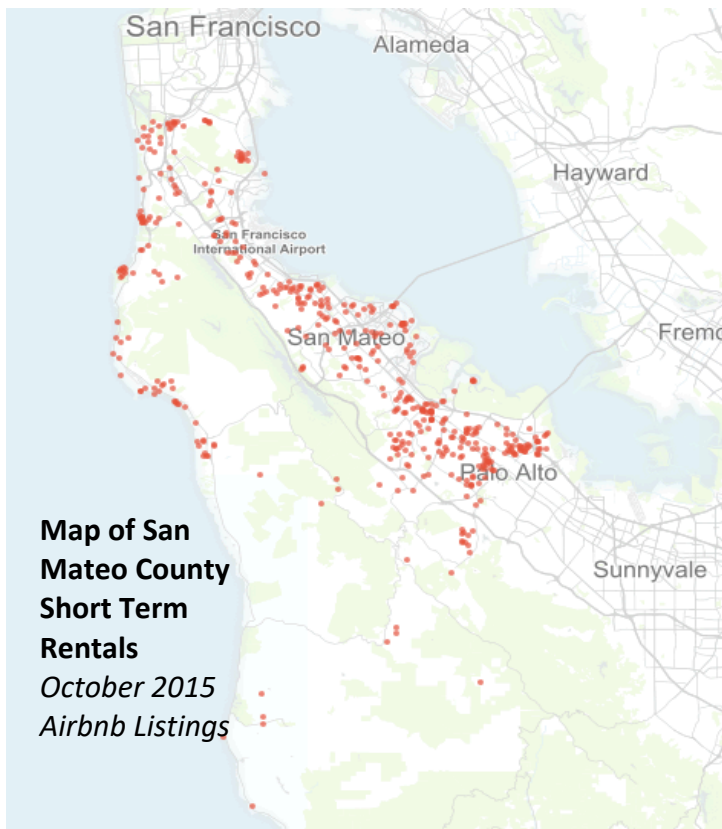
Equal Access

A lack of disability access can create safety problems or be discriminatory for people with special needs. Unlike hotels, a rental does not have to be ADA accessible. Additionally, there is concern that some hosts may refuse to rent to minorities, though Airbnb has tried to address this issue.

Other Issues

Some neighborhoods may also have disaster preparedness plans in place, which may be a problem in case of an emergency if the host has not made this information readily available to the short-term rental tenants.

San Mateo County Short-Term Rental Market At-a-Glance



It is helpful to gather data on the numbers and trends in short-term rentals and the potential for the local problems identified above. However, obtaining data can be a challenge. Jurisdictions can subpoena data from Airbnb and the like, which is what New York State did, although there are legal and practical challenges to this approach. An alternative strategy is to hire someone to download all the publically facing data from short-term rental websites. This is sometimes called *scraping the website*.

21 Elements hired a consultant to analyze Airbnb data for San Mateo County. The data is from October 2015 and is available at <http://insideairbnb.com/san-mateo-county/>. Airbnb was chosen because it is the industry leader with largest amount of listings.

The analysis showed there were 1,330 short-term listings and 18,797 reviews. The average price per night was \$193 and the average availability was for 248 days per year (Tables 1a and 1b). Of these listings, 43 percent were from hosts with multiple listings.

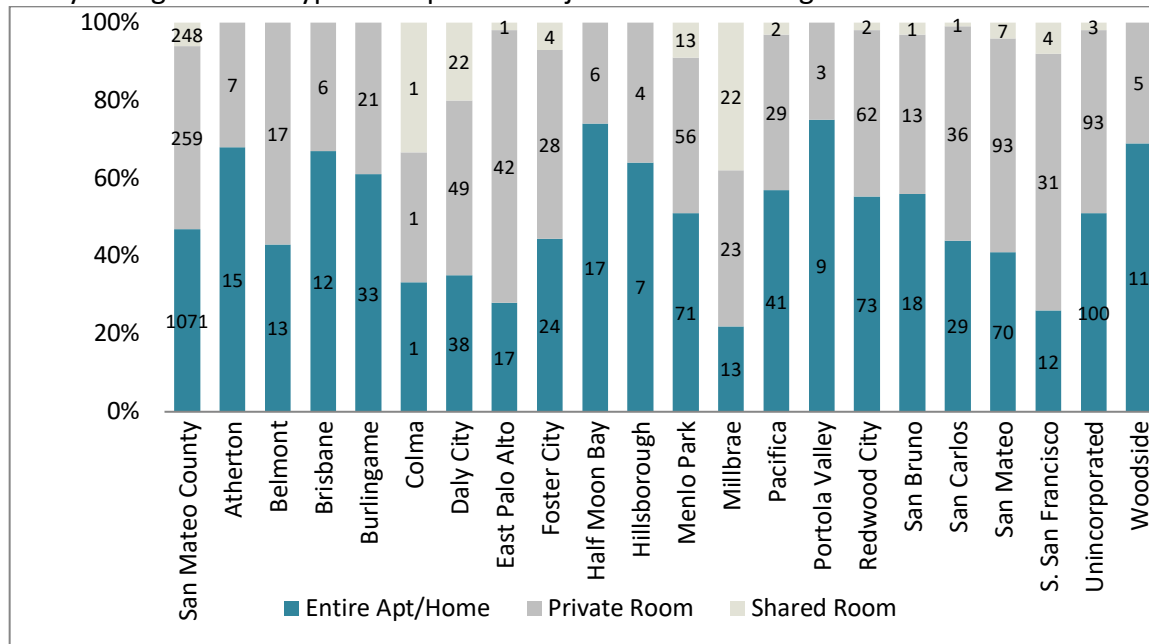
Entire Home and Private Rooms both made up 47 percent of the total listings, with Shared Rooms making up the difference of six percent. Based on the data collected, it was estimated that units were rented an average 100 days per year, bringing in an income of \$1,195 per month.

The countywide data suggests that location plays an important role in the type of rental activities that are most common in a jurisdiction. Cities that are considered popular tourist destinations or preferred locations for vacation home rentals, such as Half Moon Bay, have a higher percentage of entire home listings. Additionally, wealthier areas have a higher rate of entire home rentals, likely because the property owners are less motivated to rent rooms for extra money. Owners of these wealthier properties tend to mostly be single listings, and tend to be available year round. Areas with larger houses also are more likely to see the entire home rented out as a corporate retreat, either during the day or overnight.

Other jurisdictions that are close to airports, or have high student and short-term worker populations, have a higher demand for less expensive private and shared rooms. This type of listing makes up two-thirds of the rentals in cities like Millbrae, Daly City and South San Francisco. The majority of these owners have multiple properties listed, suggesting that they are super hosts.

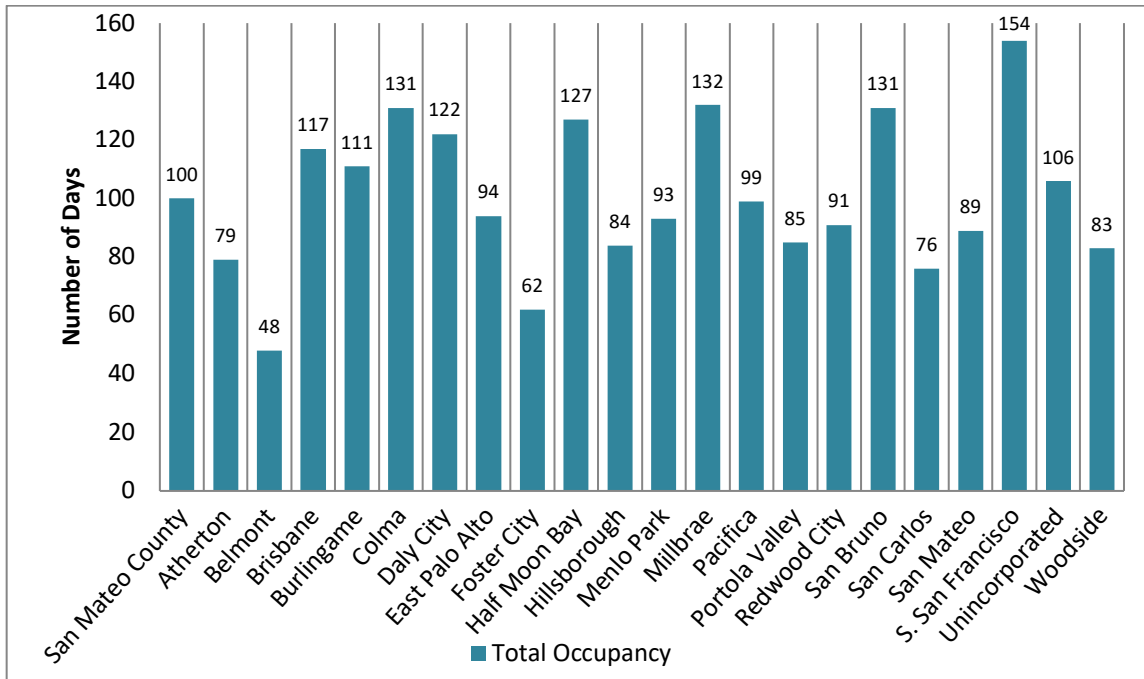
Rentals by Room Type

This graph shows the percentage of short-term rentals and amount by type, including entire home or apartment, private room and shared room. Numbers within columns represent how many listings of each type were present in jurisdictions during October 2015.



Short-Term Rental Occupied Days Per Year

This graphs shows how many days short-term rentals were occupied (rented) during the year. Total occupancy includes all room types – entire home or apartments, private rooms and shared rooms. Numbers above columns represent the average days per year that an average unit was rented as of October 2015. See Appendix 1a and 1b for more detailed information.



Regulatory Options

There are many levels of regulation to consider. The challenge is to decide which types of rental activities a jurisdiction wants to encourage, regulate or not allow. The graphic below illustrates a continuum of regulatory choices related to short-term rentals.



21 Elements conducted a survey of various jurisdictions to offer insight into some of the policy options jurisdictions want to have considered. Several jurisdictions in California and Oregon have developed short-term rental regulations that are worth reviewing. These include St. Helena, Petaluma, San Francisco, Santa Cruz County, Newport Beach, San Luis Obispo and Bend, Oregon (Tables 3a and 3b)⁸. These cities provide examples of how jurisdictions can respond in a variety of ways to different short-term rental activities.

Sample Regulatory Approaches

Many jurisdictions apply different amounts of regulation to different types of short-term rentals. The table below provides an example of how a jurisdiction’s regulatory strategy might vary across types of rentals and use.

⁸ Please see 21elements.com for updates to this list.

How Regulation Can Vary Dependent on Type of Rental and Use

Type of Rental	Occasional Use as Short Term Rental	Year Round Use as Short Term Rental
Shared Bedroom	Tax only	Tax only
Private Bedroom	Regulate lightly	Regulate lightly
Second Unit	Regulate heavily	Do not allow
Entire home	Regulate heavily	Do not allow

The most common questions for cities deciding on a regulatory approach are:

- Which types of units, if any, can be rented?
- Is there a limit on the number of days they are rented?
- Is a permit required?
- Are taxes collected?
- How are the rules enforced?

Beyond the initial list there are a number of other considerations including:

- Do hosts have to live at the unit being rented?
- Will there be safety inspections of the units?
- Will neighbors receive notification if someone wants to be a host?
- Must there be a manager identified if the owner is not available on site?
- Are there length of occupancy limits?
- Are there parking requirements?
- Are there specific noise restrictions?
- Are there limits on the number or proximity to other rentals in a given area?
- Should hosts have to have liability insurance?
- Are there reporting requirements?
- Are there specific procedures for complaints by tenants or neighbors?

Option 1. Collecting Transient Occupancy Tax (TOT)

Websites like Airbnb have been willing to collect a TOT and remit it to jurisdictions on a semi-annual basis. A number of local cities, including Redwood City, San Francisco and Berkeley have negotiated deals where their hotel tax is automatically collected. Assuming a ten percent tax, San Mateo County could likely generate over two million dollars per year. Some cities, like Redwood City, have earmarked a percentage of this to affordable housing.

Option 2. Requiring Permits

A common strategy for cities looking to regulate short-term rentals is to require a local permit. It is important to balance the cost and difficulty for a potential host to acquire a permit with the need for regulation. If it is too expensive or difficult to get a permit, casual hosts may be discouraged from applying. However, a professional host may not be discouraged by such regulation. Also, an overly cumbersome permitting system may result in people renting their homes without permits. Nonetheless, permits are a potentially important strategy to help cities understand and regulate the short-term rental market.



Most cities surveyed issue ministerial permits that are renewed every one or two years, with an initial fee ranging from \$50 to \$300. Permits vary across jurisdictions — Petaluma reduces renewal fees, while San Francisco issues one permit per permanent resident and requires proof of insurance. Santa Cruz County and St. Helena have discretionary permits with decisions deferred to the Planning Director and Commission.

For the permitting process, there are many decisions to make such as cost, what department will issue permits, notices to neighbors, business license requirements, length of permit and the revocation process. Jurisdictions have also shown interest in requiring online listings to display host permit numbers, which both hosts and sites have been resistant to do.

Limitations can be set on occupancy, parking, the number or proximity a unit is to other rentals and the number of available days per year a unit can be rented. Doing so can help reduce impacts to traffic, noise and neighborhood character. There are also numerous other actions to consider including residency requirements, inspections, and requiring liability insurance and company reporting.

Every jurisdiction surveyed also has a permit revocation policy. For instance, Petaluma will not renew a permit if there is an outstanding Transit Occupancy Tax (TOT) due. Santa Cruz County requires conflict resolution acceptance, and most cities have a revocation clause if there are complaints or code violations. Further, the City of Encinitas identifies the failure to acquire a permit as a misdemeanor.

Option 3. Occupancy, Parking and Noise Complaint Resolution Options

Limits on occupancy, parking, and noise can help address many conflicts that come up, such as increased traffic, negative impacts to neighborhood character and disruptions. **The most common occupancy limit on the number of people is two times the number of bedrooms plus two people.** Other strategies include allowing no more than four guests at a time.

There are a variety of parking regulations that can be adopted as well. Many jurisdictions require parking on site, from one or two spaces per unit. Additional parking requirements may include prohibition on overnight street parking.

Requiring rentals to comply with existing noise and public nuisance regulations is also common. Doing so could potentially burden Police or other departments that carry out enforcement of regulations. Additional requirements include posting a noise notice in units and revoking permits with repeated violations.

Option 4. Notice to Neighbors

Multiple cities require a notice radius ranging from adjacent buildings to up to 300 feet from a unit, which is required either before or after the issuance of a permit. Additionally, a handful of cities require notices to include contact information for an available and responsible party, and the display of permits in a conspicuous on-site location. San Luis Obispo also allows their



Community Development Director to hold a public hearing when substantiated written complaints are received.

Option 5. Inspections

While several jurisdictions do not have a specific policy for inspections, they expect compliance with existing fire and building codes. St. Helena requires an annual inspection by the fire department, Bend has properties inspected prior to permit issuance, and Encinitas performs inspections if there have been complaints.

Option 6. Management and Residency Requirements

Management and residency requirements are particularly helpful to regulate un-hosted units, and ensure that if issues arise, there is someone available to promptly respond. One popular management policy is to require a manager, owner or responsible party to respond on-site within a given time limit, such as within fifteen minutes or up to one hour. Other cities have taken a more lenient approach and required that someone be available by phone 24/7 to resolve issues.

While not as common as management requirements, residency requirements are now being considered by some jurisdictions. Cities like San Francisco and San Luis Obispo require owner or lessee occupancy and that the property be their primary residence.

Enforcement

Jurisdictions have found it much easier to develop short-term rental regulations than to enforce them. San Francisco recently passed an ordinance requiring hosts to register with the City's newly formed Office of Short-Term Rentals, and submit quarterly reports for the Residential Rental Registry. However, even with San Francisco's \$900,000 per year registry budget, they are unable to fully know who has exceeded the 90-day availability cap on un-hosted listings, let alone who has failed to register. Although many cities have similarly required hosts to register for licenses, they frequently are only able to respond to complaints.

To increase effectiveness, some jurisdictions are considering whether or not to allow citizens and affordable housing non-profits to directly sue hosts who break the law. Doing so could provide assistance to cities dealing with multiple cases and those cities with limited resources.

It can be difficult to know who is in compliance without involving hosting platforms like Airbnb. **The relatively small number of hosts who are violating the law in cities like San Francisco – including professional hosts and those in breach of the 90 day availability cap - account for a disproportionately small amount of company revenue.** One option jurisdictions have is to make it illegal for sites to list rentals from unregistered hosts. Another option is to require host license numbers on listings. Unless a jurisdiction decides on a complete ban on short-term rental activity, regulations will be difficult to enforce without requiring an enforcement role from the rental sites. Finally, it may be worth considering a multi-city effort to coordinate, fund and implement enforcement efforts.

APPENDIX

Table 1a: San Mateo Countywide Short-Term Rental Data, October 2015

Overall Totals and Room Types

JURISDICTION	LISTINGS	REVIEWS	TOTAL AVG. PRICE PER NIGHT	ROOM TYPE					
				Entire Home/Apt		Private Room		Shared Rooms	
				Total	%	Total	%	Total	%
San Mateo County	1330	18797	193	1071	46.9	259	46.8	248	6.2
Atherton	22	230	291	15	68.2	7	31.8	0	0
Belmont	30	239	246	13	43.3	17	56.7	0	0
Brisbane	18	301	193	12	66.7	6	33.3	0	0
Burlingame	54	1707	213	33	61.1	21	38.9	0	0
Colma	3	40	116	1	33.3	1	33.3	1	33.3
Daly City	109	1180	119	38	34.9	49	45	22	20.2
East Palo Alto	60	695	128	17	28.3	42	70	1	1.7
Foster City	54	275	175	24	44.4	28	48.1	4	7.4
Half Moon Bay	23	589	274	17	73.9	6	26.1	0	0
Hillsborough	11	155	419	7	63.6	4	36.4	0	0
Menlo Park	140	1887	208	71	50.7	56	40	13	9.3
Millbrae	58	898	116	13	22.4	23	39.7	22	37.9
Pacifica	72	841	173	41	56.9	29	40.3	2	2.8
Portola Valley	12	128	393	9	75	3	25	0	0
Redwood City	137	1376	201	73	53.3	62	45.3	2	1.5
San Bruno	32	526	192	18	56.3	13	40.6	1	3.1
San Carlos	66	857	228	29	43.9	36	54.5	1	1.5
San Mateo	170	2131	174	70	41.2	93	54.7	7	4.1
S. San Francisco	47	945	134	12	25.5	31	66	4	8.5
Unincorporated	196	3716	1496	100	51	93	47.4	3	1.5
Woodside	16	81	396	11	68.8	5	31.3	0	0

Listings, Reviews and Prices Per Night

Airbnb guests may leave a review after their stay and these can be used in addition to listings as an indicator of Airbnb activity. Total average price per night is across room types.

Room Type

Of the total listings, these numbers represent the amount of each rental type – entire home or apartment, private room and shared room.

Table 1b: San Mateo Countywide Short-Term Rental Data, October 2015
Occupancy Estimations and Annual Availability

JURISDICTION	ESTIMATIONS			AVAILABILITY					
	Days Per Year	Occupancy	Income Per Month	High		Low		Average Days	Average Days High
				Total	%	Total	%		
San Mateo County	100	27.4	1195	1071	80.5	259	19.5	248	297.5
Atherton	79	21.6	1412	21	95.5	1	4.5	299.1	310.7
Belmont	48	13.2	702	22	73.3	8	26.7	221.8	290.1
Brisbane	117	32.1	1553	17	94.4	1	5.6	306.1	324.1
Burlingame	111	30.6	1250	43	79.6	11	20.4	230.5	279.1
Colma	131	36	1325	3	100	0	0	334.7	334.7
Daly City	122	33.5	1057	85	78	24	22	249.2	307.2
East Palo Alto	94	25.6	990	55	91.7	5	8.3	295.9	319.2
Foster City	62	16.9	663	45	83.3	9	16.7	273.7	324.6
Half Moon Bay	127	34.7	2824	19	82.6	4	17.4	222.5	263.4
Hillsborough	84	23.1	1048	10	90.9	1	9.1	273.1	298.3
Menlo Park	93	25.5	1290	108	77.1	32	22.9	234.1	290.8
Millbrae	132	36.2	905	50	86.2	8	13.8	278.8	315.6
Pacifica	99	27.1	1204	59	81.9	13	18.1	251	297.5
Portola Valley	85	23.1	1835	9	75	3	25	203.3	258.3
Redwood City	91	25.1	1138	111	81	26	19	246.3	294.2
San Bruno	131	35.9	1309	23	71.9	9	28.1	201.6	267.5
San Carlos	76	20.8	950	55	83.3	11	16.7	260.8	303.7
San Mateo	89	24.4	943	130	76.5	40	23.5	232.3	289.6
S. San Francisco	154	42.3	1081	32	68.1	15	31.9	205.7	282.3
Unincorporated	106	29.1	1496	159	81.1	37	18.9	250.7	295.9
Woodside	83	22.7	2734	15	93.8	1	6.3	292.4	306.9

Estimations

The minimum stay, price and number of reviews have been used to estimate the number of days rented per year, the occupancy rate and the income per month for each listing.

Availability

An Airbnb host can setup their listing so that is available for a few days or weeks a year as well as all year-round. Highly available year-round probably do not have an owner present.

Table 2: Single and Multiple Listings by Jurisdiction
 Inside Airbnb Data, October 2015

JURISDICTION	LISTINGS			
	Single		Multiple	
	Total	%	Total	%
San Mateo County	760	57.1	570	42.9
Atherton	11	50	11	50
Belmont	28	93.3	2	6.7
Brisbane	11	61.1	7	38.9
Burlingame	36	66.7	18	33.3
Colma	1	33.3	2	66.7
Daly City	46	42.2	63	57.8
East Palo Alto	17	28.3	43	71.7
Foster City	28	51.9	26	48.1
Half Moon Bay	19	82.6	4	17.4
Hillsborough	7	63.6	4	36.4
Menlo Park	96	68.6	44	31.4
Millbrae	16	34.5	34	65.5
Pacifica	46	63.9	26	36.1
Portola Valley	8	66.7	4	33.3
Redwood City	76	55.5	61	44.5
San Bruno	24	75	8	25
San Carlos	34	51.5	32	48.5
San Mateo	99	58.2	71	41.8
S. San Francisco	32	68.1	15	31.9
Unincorporated	107	54.6	89	45.4
Woodside	14	87.5	2	12.5

Some Airbnb hosts have multiple listings. A host may list separate rooms in the same apartment, or multiple apartments or homes that are available to rent in their entirety.

Hosts with multiple listings are more likely to be running a business and less likely to be living in their property.

Table 3a: Short-Term Rental Regulation Comparison by Jurisdiction
Permits, Departments, Notices, Residency Requirements and Inspection

Jurisdiction	Type of Permit	Hearing Body/ Responsible Department	Notice to Neighbors	Residency Requirement	Inspection
St. Helena (Napa County)	Discretionary; max. 25 active permits. \$1075 application fee	Planning Director; PC review if $\geq 30\%$ neighbors oppose notice, or if owner isn't a natural person.	300 ft. radius prior to action on permit, and annually after permit granted	Only property owner may apply; single-family homes only.	Annual inspection by FD
Petaluma (Sonoma County)⁹	Ministerial; \$300 initial fee, \$100 renewal fee	Planning Director	100 ft. radius AFTER approval	Non-hosted rentals capped at 90 days/yr	No; applicant self-certifies health & safety status
County of Santa Cruz	Discretionary	Planning Director; may refer to PC	Prior to action on permit	None	No; plans must show code compliance.

⁹ Currently in public hearing process; subject to change.



Jurisdiction	Type of Permit	Hearing Body/ Responsible Department	Notice to Neighbors	Residency Requirement	Inspection
San Francisco ¹⁰	Ministerial; \$50 fee. 1 permit per permanent resident. Proof of insurance req'd.	Planning Dept. staff	-	Permanent resident (natural person, owner or lessee). Primary residence only. Non-hosted rentals 90 days/yr	-
Bend, OR	Ministerial; \$275 Initial and \$200 for renewal.	Planning Dept. Staff	Annual notification (by mail or hand delivery) within 250 ft. radius or post a small placard within public view.	Only property owner can apply	CDD or designee will inspect the property prior to acceptance.
Encinitas	Ministerial; \$150	Office of the City Clerk	Notify adjacent neighbors and provide them with a contact who is available 24/7 in case of problems.	None	Office of the City Manager can inspect if there are any complaints of code violations.
Newport Beach	Ministerial; \$150 plus business license fee (varies by zoning district)	Finance Department	Display permit on-site in a conspicuous place.	None	None.

¹⁰ San Francisco ordinance may undergo further review and revisions due to difficulties in implementation.



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<p>San Luis Obispo</p>	<p>Ministerial \$312; requests to waive parking requirement subject to discretionary approval (administrative use permit) \$873</p>	<p>Community Development Department; Director or designee</p>	<p>Contact information for the property owner must be provided to the adjacent neighbors. CDD Director may elect to hold public hearing for admin use permit if substantiated written complaints are received.</p>	<p>Owner occupancy required; dwelling must be owner's primary residence. Proof required with permit application.</p>	<p>Performance standards require compliance with fire and building codes, but no inspection required for receiving a permit.</p>
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Table 3b: Short-Term Rental Regulation Comparison by Jurisdiction
 Management, Occupancy Limits, Parking, Noise, Business License/TOT and Penalties

Jurisdiction	Management	Occupancy Limits	Parking	Noise	Business License/TOT	Permit Revocation/Penalties
St. Helena (Napa County)	Manager who can respond within 30 min.	2x the # of bedrooms plus 2 people	Must provide 2 spaces on-site; no street parking allowed overnight.	Quiet hours 10 p.m.- 7 a.m.	Yes/Yes	Permit valid for 2 yrs; may be revoked by Director if the owner violates Ordinance or conditions.
Petaluma (Sonoma County)¹¹	Manager who can respond with 1 hr.	2x the # of bedrooms plus 2 people	Must meet min. standard of district or apply for CUP	Must comply with adopted noise standards	Yes/Yes	May not be renewed if TOT is outstanding, neighbor complaints, etc.
County of Santa Cruz	Manager who lives within 30 mi.	2x the # of bedrooms plus 2 people; 2x max for daytime gatherings	Renter’s cars must be parked on-site except for 2 cars allowed on-street	Must comply with adopted noise standards; notice must be posted in unit	Yes/Yes	Conflict resolution acceptance is required. Handled by County mediation center.

¹¹ Currently in public hearing process; subject to change.



Jurisdiction	Management	Occupancy Limits	Parking	Noise	Business License/TOT	Permit Revocation/ Penalties
San Francisco ¹²	Yes; permanent resident or other designated contact.	-	-	-	Yes/ Yes; collected by hosting platform	Permit valid for 2 yrs; code violations cause for revocation. Penalties may apply.
Bend, OR	Owner/manager has to be available (by phone etc.) 24/7 while someone is renting the property.	Limits of the household.	One parking spot per bedroom	Must comply with Bend adopted noise standards.	Maybe /Yes (business license applicability left undefined in ordinance; not specifically referenced in business license code)	Renew every year, can be revoked and/or penalized for code violations. If not renewed it is immediately revoked.
Encinitas	Must have a contact who is available 24/7 for neighbors and the city.	Overnight occupancy limited to 2 per bedroom plus one.	Must be located on private property and to city standards; no overflow street parking permitted overnight.	Comply with state and local noise/public nuisance regulations.	Yes/Yes	No permit results in a misdemeanor. There are four levels of fines that can be imposed for infractions. Can revoke permit for code violations.
Newport Beach	Property owner or designated agent.	Per CBC as adopted and/or amended in Title 15 of Newport Beach muni code	None required.	Loud and Unruly Gathering ordinance enforced by PD; repeated violations may lead to permit revocation.	Yes/ Yes	Complaints and violations require an inspection. If they find evidence of a violation they can revoke the permit. Four levels of fines for violations, and if you do not have a permit it results in a misdemeanor.

¹² San Francisco ordinance may undergo further review and revisions due to difficulties in implementation.



San Luis Obispo	Owner must be within a 15-minute drive of the property and available to respond by phone to complaints.	No more than four adult guests at a time.	One on-site parking space required in addition to parking for dwelling.	Must comply with city noise ordinance.	Yes/ Yes; additional tourism business improvement district tax.	Violation will result in revocation. At any time the permit can be sent to an AUP hearing and if there is enough evidence the CDD can revoke or apply conditions to permit.
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Source: Inside Airbnb <http://insideairbnb.com/san-mateo-county/>