

Airbnb in the Byron Shire – Bane or Blessing? An Investigation into the Nature and Range of Impacts of Airbnb on a Local Community

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1 Executive Summary

This report provides preliminary summaries of data obtained from primary research on the perceptions of Airbnb's impacts on the Byron Shire community, New South Wales (NSW), Australia. The 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). A team of SBAT researchers conducted interviews and implemented a survey to understand Byron Shire (BS) residents' views on the positive and negative impacts of Airbnb within the Shire. The research project followed an initial 2018 scoping study which investigated peer-reviewed studies on the implications of Airbnb on local communities around the world. The aims of this current project were to:

1. Profile the nature of Airbnb in the Byron Shire, i.e. to determine the size, main attributes and development patterns of Airbnb in the Shire.
2. To describe, critically analyse and explore the community perspectives on the perceived positive and negative impacts of Airbnb within the Shire in order to inform specific and locally appropriate solutions.

To fulfil these objectives, the research team leveraged the literature review from a prior study to inform the conduct of 22 semi-structured interviews with diverse key informants in the BS. The interview data further informed the survey instrument which garnered the views of over 800 BS residents.

Key findings

1. While the survey found that increased income for Airbnb hosts, increased employment opportunities for locals, and increased local tax revenue were the major positive impacts of Airbnb, the negative impacts included reduced availability of affordable housing for residents, increased traffic and parking congestion, increased waste management problems, and increased infrastructure costs.
2. Most respondents preferred a model which involved *on-site management* for any short-term holiday lettings (STHL)². Thirty-seven per cent of respondents wanted 'No restriction' on rentals of STHL properties *with* on-site management, which meant the host could operate 365 days per year. However, for STHL rentals without on-site management, 39% of respondents favoured rentals capped at '0 days' (such rentals not allowed at all), while 27% supported a cap of 'Less than 90 days per year'.
3. Most respondents (including Airbnb hosts) felt that STHL needs to be better regulated. Furthermore, the majority of respondents agreed with the need for greater public information on Airbnb-related issues within the Byron Shire.

² Note: Short-term holiday letting (STHL) and Short-term letting (STL) as terms widely reported through the media and government statements are used interchangeably in this document.



2 Introduction

To understand the main attributes and development patterns of Airbnb in the Byron Shire (Project Aim 1), the team accessed data including visitor numbers from Destination Byron and Tourism Research Australia; BS Airbnb listings from Inside Airbnb, BnBGuard and the Australian Coastal Council; and international trends regarding Airbnb from the peer-reviewed literature.

Australia overall is experiencing rapid growth in Airbnb listings, particularly in coastal destinations such as the Byron Shire (Gurran, Zhang, Shrestha, & Gilbert, 2018). This phenomenal growth in Australia is evidenced through the 58,210 Airbnb listings in April 2016. Listings increased to 130,665 in December 2017 and reached 160,479 at the end of 2018 (Cox 2019). According to InsideAirbnb, NSW has the highest number of Airbnb listings in Australia (64,856 properties by December 2018). However, other states such as Queensland, Victoria and Western Australia almost doubled their Airbnb listings between April 2017 and December 2017. All states continued to experience increases of Airbnb listings over 2018 (Full details available at Gurran et al., 2018).

Regional Australia is embracing the Airbnb concept, with a steady increase in Airbnb listings. The Byron Shire, as the current case study, is particularly prone to new listings. With more than two million visitors each year, the Shire is one of the most attractive tourist destinations in Australia. Visitors outnumber residents by a ratio of 70 to one.

According to the Australian Coastal Councils Association, the BS is also one of Australia's least affordable regional rental-housing markets with 17.6 per cent of properties in the Shire listed as short-term lettings (STLs) (Gurran et al., 2018). The majority of these STLs are listed on online rental platforms, notably Airbnb – the largest, fastest-growing online platform. Airbnb raises polarised opinions within the BS community. As the impact of the STL sector is the subject of ongoing debate, it is important that policy makers for affordable housing and tourism destination marketing have comprehensive, reliable, and evidence-based information on their own locations.

Until 2011 Airbnb listings in the Byron Shire were not recorded. Airbnb listings increased from a few hundred in 2012 to 1,172 at the end of 2016, to 2,740 listings at the end of 2017, and then to 3,037 listings at the end of 2018 (Cox, 2019). Though the beginning of 2019 saw a very modest reduction of 108 listings, the InsideAirbnb website still counted 2,929 listings in the BS. Of these listings, 78.7% were for entire houses or apartments with a 20% estimated occupancy, meaning that these houses were only rented by guests for around 70 days of the year. According to the InsideAirbnb website, over half of individual Airbnb hosts (54%) in the BS had multiple listings. One single owner-host listed 108 properties (Cox 2019).

This one example of multiple listings bears witness to some host motivations. Those with multiple properties are more likely to run their operations as a business in contrast to those living in their single-listed property and merely enjoying the supplemental income and intrinsic reward of host/guest interactions. STL figures sourced from the online monitoring site, BnBGuard, last year revealed that the numbers of total unique STL addresses across the five postcodes of BS is as high as 5611 listings. Notably, BnBGuard was still only monitoring 15 of the 350 sites offering STL properties in the BS. By comparison, InsideAirbnb provides data solely on Airbnb property listings (Morrow, 2019). The scale of these STL figures and their positive and negative impacts on the small Byron Shire community are significant and warrant further investigation.



3 Research Design

To inform Project Aim 2, a two-pronged design for primary data collection was developed:

- In-depth interviews with diverse and multiple Byron Shire stakeholders with or without an interest in Airbnb were conducted across the Shire to determine the range of issues to be captured.
- A large-scale survey of Byron Shire community members on various aspects of Airbnb was conducted.

3.1 Interviews

Informed by the international literature as well as insights pertaining to the Byron Shire, semi-structured interviews were conducted with 22 key BS informants to obtain views regarding STHL, including Airbnb. The interviewees included councillors, Airbnb hosts, local journalists, licenced accommodation providers, 'victims of holiday lettings', and residents who either lived in their own property or rented as tenants.

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 five main issues were explored:

1. Stakeholder perceptions on the degree of change in the short-term accommodation sector within the BS (particularly in Byron Bay) over the past five years.
2. Stakeholder perceptions on the positive and negative impacts of Airbnb on the community.
3. Solutions to overcome some of the challenges/concerns arising from the growth of Airbnb.
4. Community information needs regarding Airbnb in the BS.
5. Other important issues for residents regarding impacts of Airbnb within the BS.

The interviews were transcribed, coded and then analysed using thematic analysis through a step-by-step process.


3.2 Survey

Informed by the interview data, a Qualtrics survey questionnaire was developed to obtain BS residents' views on the positive and negative impacts of Airbnb within the Byron Shire. The survey was pre-tested before its launch on 29 October 2018. It was circulated through the BS using several (social) media channels before closing on the 15th of December 2018. Questions were asked about the impact of Airbnb on housing and accommodation, local businesses, tax revenues, visitor numbers, infrastructure, and anti-social behaviour across the BS; the impact of any nearby STHL properties on the respondent; further information needs about various Airbnb-related issues; possible regulations of STHL in the BS; and for Airbnb hosts, their experiences as hosts.

3.3 Data analysis strategy

The following analyses were undertaken:

- Descriptive analysis of residents' postcodes and length of living in the BS
- Principal component analysis to explore the dimensionality of perceived impacts of Airbnb

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- Differential analyses, such as ANOVA and cross tabulations, to explore how (1) geographical locations (post codes) and host status are associated with perceived impacts of Airbnb; (2) Airbnb host/non-host status is associated with preferred maximum STHL-rental cap and preferences to regulate STHL.

4 Summary of Results

A brief overview of the preliminary results from the interviews and survey research is provided below.

4.1 Interview results

All 22 interviewees identified a considerable change over the past five years in the STL sector within the Shire and specifically in Byron Bay. They observed a substantial growth in the number of visitors and visitor accommodation. Participants also commented on the increasing range and magnitude of impacts that Airbnb has on the community and on accredited accommodation providers in the Shire.

Most participants recognised a range of **benefits of Airbnb** on the BS community including:

1. Extra income for Airbnb hosts (16 interviewees; 73% of interviewees)
2. Increased revenues for local businesses (8; 36%)
3. Increased choice and variety of accommodation for tourists (7; 32%)
4. Opportunity for residents and tourists to connect (3; 14%).

On the other hand, participants identified eight main **negative impacts** of Airbnb on the BS community:

1. Reduced supply of and increased prices for long-term rentals (18; 82%)
2. Displacement of locals and loss of community and neighbourhood (15; 68%)
3. Added strain on local infrastructure (15; 68%)
4. Decreased employment-pool in Byron Bay (BB), particularly in hospitality (12; 54%)
5. Disruptive behaviour of tourists in residential areas (12; 54%)
6. Increased noise levels (10; 45%)
7. More non-approved 'illegal' tourist accommodation ('unfair playing field') leading to decline in bookings for accredited accommodation providers (9; 41%)
8. More traffic congestion (locals forced to live further away but driving in to BB for work; overcrowding of BB by tourists) (9; 41%).

Participants were unanimous in their view that more regulation of Airbnb properties is required. They articulated nine main solutions to overcome some of the challenges/concerns arising from the growth of Airbnb in the BS community, which is already experiencing high visitor numbers:

1. Greater regulation of Airbnb properties (22; 100% of interviewees)
2. Council's position & enforcement of current regulations (11; 50%)
3. 'Fair play' for all accommodation providers (9; 41%)
4. Information about Airbnb properties (e.g. signage with host contact details) (7; 32%)
5. Regulation for the management of Airbnb properties with defined parameters (7; 32%)
6. Establish a registration system (7; 32%)
7. Introduce a bed-tax (4; 18%)
8. Severe penalties for disruptive behaviour of Airbnb guests (4; 18%)
9. Catching people's voices/experiences with Airbnb properties ('telling their stories') (2; 9%).



Asked about their main information needs in relation to Airbnb in the BS, the number one area of concern of interviewees (86%) was a strong desire within the community for more general facts and figures about Airbnb and other STHLs. The other aspects of sought-after information - ranked in order of frequency of concern to participants - were: (2) long-term impacts on the community, (3) transparent and in-depth information to facilitate deeper understanding of Airbnb, (4) information on the extent of compliance of Airbnb properties with regulations, (5) information on long-term impacts on businesses and infrastructure, (6) information on long-term impacts on accommodation supply and (7) maps of Airbnb hotspots.

As explained above, the in-depth interviews conducted were part of a larger research project, which also included a survey of BS residents. The interviews informed survey design through the topics discussed as well as questions the interviewees felt should be included in the survey.

The following eight topics were identified of main concern (ranked in order of frequency):

1. Perceived positive and negative effects of Airbnb
2. Knowledge of and experience with Airbnb
3. Ways to address Airbnb's negative impacts
4. Acquainted with Airbnb or an Airbnb host themselves
5. Further information needs
6. Personal experience with needing to vacate a rental property for an Airbnb letting
7. Support for a community-based approach to manage Airbnb
8. Vision of Byron's future demographic.

To summarise the interview component of this project, all 22 interviewees identified a considerable change over the past five years on the STHL sector within the Shire, and specifically in Byron Bay. Most participants recognised a range of benefits of Airbnb. The leading positive impact perceived was that of extra income for the Airbnb host. At the same time, all participants were concerned about a wider set of negative impacts. The interviews revealed an emotional load, including anger and frustration with Airbnb, carried by local community members, which the research team suggests has not yet been properly accounted for in the international literature on Airbnb. Several questioned the morality and ethics of Airbnb and attributed a range of serious social issues to Airbnb, including the displacement of locals and homelessness. This suggests that this emotional strain on host communities requires further research.

4.2 Key survey results

4.2.1 Sample profile

A total of 1,017 survey responses were received. After deleting incomplete submissions, a data sample of 819³ BS residents was obtained. Most survey questions were to be answered by all respondents. Questions on the Airbnb host experience were directed only to those who were Airbnb hosts. Table 1 shows respondents' postcode areas. As indicated in Table 1, the majority of survey respondents (55%) lived in Byron Bay and surrounding areas, followed by 18% from Ocean Shore and surrounding areas. 13% and 8% lived in Mullumbimby and Bangalow & surrounding areas respectively. Fourteen respondents (1.7%) stated that they currently lived in the Byron Shire, but they provided a postcode missing an end digit. Considered a typographical error only, the decision was made to retain these respondents in the data set.

³ The sample size relating to each key finding reported in the following sections varies, as not all 819 respondents answered all pertinent questions.



Table 1 - Respondents' postcode areas (n=819)

Postcode	In %	Postcode areas
2479	7.7	Bangalow & surrounding areas (e.g. Binna Burra, Coorabell & Newrybar)
2480	4.9	Clunes & surrounding areas (e.g. Coopers Creek, Eureka & Federal
2481	55.1	Byron Bay & surrounding areas (e.g. Broken Head, Ewingsdale & Suffolk Park)
2482	12.7	Mullumbimby
2483	17.9	Ocean Shores & surrounding areas (e.g. Billinudgel, Brunswick Heads, SGB & Yelgun)
other	1.7	Not clear (Typos in Postcode)
100.0		

Table 2 reflects the length of respondents' residency within the BS. The average length of respondents' residency within the BS was 19 years. 39% of respondents had resided for over 20 years while almost 30% had resided between 11 and 20 years in the Shire.

Table 2 - Respondents living in BS (n=819)

Years of living in Byron Shire	Percent
1-5 years	16.1
6-10 years	15.1
11-20 years	28.9
Above 20 years	39.1
Total	99.3
Missing	.7
Total	100.0

Out of the 819 survey respondents, 67% (552) lived in their own properties, while 26% (215) rented. Furthermore, 85% (699) of all respondents said that they were aware of STHLs within 200m of their residence, with 75% acknowledging that these STHLs were Airbnb listings.

One key finding of the study was that of the 215 respondents (26%) in rented accommodation, almost half (90, 42%) had been asked to leave a previous rental. Fifty-eight, or 64% of those asked to leave a rental, reported that they knew their rental property was about to be listed on Airbnb.

4.2.2 Perceived impacts of Airbnb

Overall, the survey results report nine main negative impacts on the Byron Shire community and two main positive impacts. When reviewing specific stakeholder responses (e.g. hosts vs non-hosts) the positive responses were attributed to eight indicators.

The following **nine negative impacts** of Airbnb on the community (ranked by mean) were perceived by Airbnb hosts and non-hosts alike (see Table 3 on page 9). Questions were asked using a five-point Likert scale (1=strongly disagree to 5=strongly agree). As can be seen, more than three-quarters of respondents agreed on the top two negative impacts of Airbnb – the reduction of affordable housing for residents and increased traffic and parking congestion. More than two-thirds of respondents agreed on the next three main negative impacts of Airbnb on the community – Airbnb leads to increased waste management problems, extra costs to ratepayers to provide infrastructure, and increased noise levels. Airbnb-hosts tended to perceive all negative impacts less negatively than non-Airbnb hosts. The views diverged most strongly for the impact



'leads to anti-social behaviour'. Airbnb hosts tended to disagree (mean 2.56) with this statement, while non-Airbnb hosts tended to agree (3.82) with it.

Table 3 - Negative impacts for the community

Airbnb ...	Mean			Overall agreement in % (n= 814)		
	Overall (n=766)	Airbnb host (n=151)	Non-host (=615)	Disagree	Neither	Agree
1. Reduces the availability of affordable housing for residents	4.17	3.37	4.40	15%	8%	77%
2. Increases traffic and parking congestion	4.07	3.13	4.33	16%	9%	75%
3. Leads to increased waste management problems	3.97	3.15	4.20	14%	14%	72%
4. Leads to extra costs to ratepayers to provide infrastructure	3.99	3.20	4.22	15%	14%	71%
5. Leads to increased noise levels	3.98	3.03	4.24	15%	15%	70%
6. Adversely affects lifestyle of neighbourhood residents	3.97	2.89	4.27	19%	12%	69%
7. Leads to overuse of public facilities (e.g. toilets)	3.74	2.91	3.98	21%	19%	60%
8. Increases the property prices	3.72	3.28	3.87	20%	19%	61%
9. Leads to increased anti-social behaviour	3.55	2.56	3.82	24%	22%	54%

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

The following **two positive impacts** of Airbnb on the community (ranked by mean) were perceived by Airbnb hosts and non-hosts alike (see Table 4). Airbnb-hosts tended to perceive positive impacts more favourably than non-hosts. The views diverged most strongly for the impact 'leads to increased employment opportunities for locals'. Airbnb hosts tended to agree (mean 4.01), while non-Airbnb hosts tended to be neutral (neither agree nor disagree) (2.86).

Table 4 - Positive impacts for the community

Airbnb...	Mean			Overall agreement in % (n=814)		
	Overall (n=766)	Airbnb host (n=151)	Non-host (n=615)	Disagree	Neither	Agree
1. Leads to increased employment opportunities for locals	3.10	4.01	2.86	34%	26%	40%
2. Leads to increased local tax revenue	2.66	2.98	2.59	48%	27%	25%

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

The following **eight positive impacts of Airbnb predominantly for specific stakeholders** (ranked by mean) were perceived by Airbnb hosts and non-hosts alike (see Table 5 on page 10). There was near consensus among respondents that Airbnb provides incomes for Airbnb hosts. Most respondents agreed that Airbnb brings more visitors into the BS, although Airbnb hosts registered less strongly (3.99 vs 4.28) on this point. Most respondents felt that as a result of Airbnb there were more property investors in the Shire, but again Airbnb hosts were less strong in their views (3.62 vs 4.33). Most respondents felt Airbnb provides tourists/visitors with a greater variety of and more affordable accommodation choices. Furthermore, over 60 percent of respondents perceived that Airbnb had a positive effect on revenues for local businesses.

Table 5 - Positive attributes of Airbnb identified by community



Airbnb ...	Overall (n=766)	Mean		Overall agreement in % (n=814)		
		Airbnb host (n=151)	Non-host (n=615)	Disagree	Neither	Agree
1. Provides income for Airbnb hosts	4.30	4.50	4.26	1%	5%	94%
2. Leads to increased number of visitors into the Byron Shire	4.21	3.99	4.28	6%	10%	84%
3. Leads to increased number of property investors	4.18	3.62	4.33	8%	13%	79%
4. Offers more variety in accommodation for tourists	3.94	4.49	3.80	8%	11%	81%
5. Increases revenues for local businesses	3.71	4.24	3.57	11%	25%	64%
6. Enables Airbnb hosts to stay in their homes	3.38	4.17	3.18	21%	32%	47%
7. Leads to greater variety of retail services (e.g. restaurants, leisure services)	3.09	3.78	2.91	30%	35%	35%
8. Makes Byron Shire a more affordable tourist destination	2.81	3.61	2.61	45%	20%	35%

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

In relation to views of respondents from different geographic locations (postcodes):

- No significant differences were found with regards to perceived impacts of Airbnb.
- Residents living in the area with the postcode of 2480 (Clunes & surroundings areas) tended to have stronger opinions on the implementation of a registration/permit system for STHL (including Airbnb) than residents with postcodes of 2481 (Byron Bay & surrounding areas) did.

4.2.3 Perceptions on rental cap

The survey captured views of both Airbnb hosts and non-hosts on the duration of their preferred rental cap for STHL properties (a) **with** and (b) **without on-site** management (see Table 6 on page 11).

(a) Properties **with on-site** management

Among all five BS postcode groups, 37% (287) of respondents felt that there should be no restrictions at all for properties *with on-site* management, meaning that these properties could be rented 365 days per year. Notably 72% of all Airbnb hosts wanted no restrictions on properties *with on-site management*, compared to only 29% of non-Airbnb hosts. The majority of non-Airbnb hosts favoured a cap on *on-site* managed properties. 31% of non-Airbnb hosts favoured a maximum cap of 180 days on such STHL rentals, while 32% favoured a cap of less than 90 days.

(b) Properties **without on-site** management

Among all five BS postcode groups, 39% (299) of all respondents wanted 0 rental days (*full restrictions = no STHL rentals*) for properties *without on-site management*. Even 15% of Airbnb hosts wanted full restrictions (0 days) for such properties (compared to 45% of non-Airbnb hosts). Clearly, most respondents preferred a model which involves on-site management of STHL.



Table 6 - Differences between Airbnb hosts and non-Airbnb hosts regarding rental caps on STHL

(n=766; 151 Airbnb hosts, 615 non-Airbnb hosts)

	365 days per year (No restriction)	Max. 180 days per year*	Less than 90 days per year	0 days (Not allowed at all)	Total
A. With on-site management					
Airbnb hosts (number)	108	25	16	2	151
% of Airbnb hosts	(72%)	(17%)	(11%)	(1%)	(100%)
Non- Airbnb hosts (number)	179	186	199	51	615
% of Non-hosts	(29%)	(31%)	(32%)	(8%)	(100%)
Total (number)	287	211	215	53	766
% of all respondents	(37%)	(28%)	(28%)	(7%)	(100%)
B. Without on-site management					
Airbnb hosts (number)	57	40	31	23	151
% of Airbnb hosts	(38%)	(26%)	(21%)	(15%)	(100%)
Non- Airbnb hosts (number)	67	94	178	276	615
% of Non-hosts	(11%)	(15%)	(29%)	(45%)	(100%)
Total	124	134	209	299	766
% of all respondents:	(16%)	(18%)	(27%)	(39%)	(100%)

*Includes two groups: Max. 180 days per year and 90 < 179 days per year

Table 7 - Ways to regulate STHL in the BS

STHL needs to be regulated in the following ways ...	Overall	Mean		Overall agreement in % (n=766)		
		Airbnb host (n=151)	Non-host (n=615)	Disagree	Neither	Agree
1. Adequate reporting avenues to lodge complaints of misconduct	4.51	4.02	4.63	3%	7%	91%
2. Adequate enforcement of non-compliance	4.37	3.70	4.54	4%	12%	84%
3. Compulsory public liability insurance to cover STHL guests and third parties for injury or damage (including Airbnb)	4.15	3.44	4.32	12%	11%	77%
4. A bed tax or levy for any tourist accommodation (irrespective of the accommodation type)	4.10	3.49	4.25	15%	10%	75%
5. Restrictions on Airbnb properties without on-site management	4.06	3.08	4.30	17%	8%	75%
6. Adequate provision of fair trade (i.e. it is a level playing field) within the accommodation-provider sector	4.01	3.35	4.17	9%	20%	70%
7. Implementation of a registration/permit system for STHL (including Airbnb)	3.99	3.01	4.24	17%	8%	74%
8. Council-supported community advisory panel regarding STHL	3.94	3.10	4.15	13%	16%	71%
9. Zoning restrictions for STHL in residential areas	3.86	2.73	4.14	22%	10%	68%

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



4.2.4 Perceptions on regulations of STHL in the Byron Shire

A majority of respondents supported all nine ways of regulating STHL they were questioned about (see Table 7 on page 11). Over 90% of respondents asked for avenues to report complaints of misconduct, while 84% requested appropriate enforcement of non-compliance. Overall, the Airbnb hosts appeared to require less regulation on STHL.

4.2.5 Further information needs

As presented in Table 8, the majority of respondents agreed with the need for greater public information on Airbnb-related issues within the Byron Shire. More information about the particular impacts of Airbnb on the community is highly sought after, including impacts on residential-rental accommodation and infrastructure. Again, Airbnb hosts tended to have lower information needs than non-Airbnb hosts.

Table 8 - Importance of information about Airbnb-related aspects in the BS

Important to have information about ...	Overall	Mean		Of importance in % (n=782)		
		Airbnb host (n=151)	Non-host (n=615)	Not important	Average important	Very important
1. Long-term impacts on residential-rental accommodation	4.20	3.46	4.40	10%	12%	78%
2. Long-term impacts on infrastructure (i.e. roads, waste management facilities)	4.19	3.55	4.37	8%	14%	78%
3. Long-term impacts of Airbnb on the community	4.14	3.39	4.35	9%	15%	76%
4. Extent of compliance with existing STHL regulations	4.03	3.27	4.24	10%	18%	72%
5. Regulations regarding Airbnb rentals (e.g. hosts' responsibilities, guests' rights)	3.94	3.33	4.10	12%	19%	69%
6. Long-term impacts on businesses in town	3.77	3.58	3.83	8%	30%	62%
7. Long-term impacts on commercial accommodation providers	3.70	2.97	3.90	17%	26%	57%
8. The location and type of Airbnb properties (e.g. in a map, identifying with/without on-site managed properties)	3.40	2.49	3.65	26%	21%	53%

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

4.2.6 Airbnb-hosts' motivations

As mentioned above, questions on the Airbnb host experience were directed only to those who were Airbnb hosts. Airbnb hosts (151; 18% of all respondents) agreed with the statement that their main motivation to become a host was the additional income that enables them to afford living in the Byron Shire. As can be seen in Table 9 below, other motivations for being a host included the enjoyment of assisting their Airbnb guests with their travel needs and the social engagement with their guests.



Table 9 - Motivation for becoming an Airbnb-host

Motivation to become an Airbnb host	Overall Mean	Of agreement in % (n=151)		
		Disagree	Neither	Agree
1. The additional income from Airbnb enables me to afford living in the BS	4.09	14%	10%	76%
2. It gives me pleasure to assist Airbnb guests with their travel needs/inquiries	4.04	10%	12%	78%
3. I enjoy the social engagement with Airbnb guests	3.90	13%	17%	70%
4. I feel more secure with Airbnb guests in my residence	3.34	24%	34%	42%

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

The majority of Airbnb-host respondents lived on-site of their Airbnb property. They rented individual bedrooms (39%) or an attached (23%) or detached studio / cottage (16%). However, as seen in Table 10, thirty-six per cent of all Airbnb hosts rented out properties which do not have on-site management. 25% of these hosts rented a whole house via the Airbnb platform, compared to 15% of the on-site hosts.

Table 10 - Accommodation types Airbnb hosts have listed

Accommodation types*	On-site management	Without on-site management
	Number / % of all hosts	Number / % of all hosts
Individual bedroom(s)	59 (39%)	6 (4%)
An attached studio	34 (23%)	4 (3%)
A detached studio/cottage	24 (16%)	4 (3%)
A whole house	23 (15%)	38 (25%)
Other	5 (3%)	3 (2%)
Total number / % of all hosts	145 (96%)	55 (36%)

* Multiple listings possible

Besides advertising their STHL property on Airbnb, 84% of all hosts stated that they also advertised on other platforms, particular StayZ, Booking.com, Agoda and Expedia.

5 Further research needs

There is opportunity to take the research further with new funding opportunities. Particular need exists for:

1. Further analysis of the impacts of STHL (in particular Airbnb) on approved accommodation operators within the Byron Shire.
2. Further analysis of the emotional impacts of Airbnb on host communities.



Additionally, the current research methodology can be replicated to other North Coast towns in NSW. This comparable data set(s) could further understanding on why different regions in NSW might need different STL regulations.

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To increase awareness of and responses to the survey, a substantial amount of media/public outreach was conducted by Dr Sabine Muschter, who is also a Byron Bay resident. Sabine was interviewed on ABC North Coast, Bay FM and Triple Z, Lismore. Additionally, she contacted newspapers (*The Echo*, *Byron Shire News*, *The Northern Star*, and *Byron Bazaar*) which ran articles on the survey. Due to Dr Muschter's outreach, information on the survey was also sent out by the SCU media office, the Byron Shire Council, the Byron Community Centre, the Byron Bay Chamber of Industry, Destination Byron, the Sourdough Business Group, and other community groups via their social media sites.

7 Project Outputs

Upon finalisation, the research findings will be shared with the Byron Shire community. In the meantime, the following project outputs have been delivered to date, or have been accepted for presentation/publication:

Caldicott, RW., Che, D, Muschter, S. and von der Heidt, T. 2019. *"In defiance to moral panics: Airbnb as the unsung "B-side" of the digital technologies "disruption" playlist!"* Manuscript to be submitted to *Tourism Geographies* by end of March for a special issue focused on *Digital Technology, Tourism and Geographies of Inequality*.

Che, D., Caldicott, RW, Muschter, S. and von der Heidt, T. 2019. *"Airbnb: the unsung 'B-side' of the digital technologies playlist 'disrupting' Byron Bay, Australia"*, presentation for delivery at the *American Association of Geographers (AAG) Conference (Washington DC)* on 4 April. The session theme is *Digital Technology, Tourism and Geographies of Inequality*.

Che, D., Muschter, S, von der Heidt, T. and Caldicott, RW. 2019. *"Community report: Airbnb in the Byron Shire (BS) – Bane or blessing? An investigation into the nature and range of impacts of Airbnb on a local community"*, *Southern Cross University, Lismore, NSW, Australia, March*, viewed 25 March 2019, <scu.edu.au/airbnb-impacts>.

von der Heidt, T., Muschter, S., Caldicott, RW. and Che, D. 2019. *"Airbnb – Bane or Blessing? Key Informants' View on Impacts on Community in the Byron Shire, Australia"*. Sustainability of Tourism, Hospitality & Events in a Disruptive Digital Age: Proceedings of the 29th Annual Conference of the Council for Australasian University Tourism and Hospitality Education (CAUTHE), Cairns, QLD, 18-20 February, eds. A. Pabel, E. Konovalov, L. Cassidy, and P. Jose, 589-592. Cairns: Central Queensland University, Australia.

von der Heidt, T., Caldicott, RW, Scherrer, P & Muschter, S, Canosa, A. 2018, *"Impacts of Airbnb from a macro marketing perspective"*, paper presented to The Australian and New Zealand Marketing Association Conference (ANZMAC), 3-5 December, University of Adelaide, SA, Australia, <<https://anzmac2018.com/wp-content/uploads/2018/11/ANZMAC2018-Proceedings.pdf>>.



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Morrow, C. (2019, 21 February 2019). Renters lose homes to Airbnb survey shows. *Byron Shire News*. Retrieved from <https://www.byronnews.com.au/news/renters-lose-homes-to-airbnb-survey-shows/3652782/>