

MEMO

DATE: May 19, 2022

TO: Planning Commission Members

FROM: Rachel Smith, AICP, Senior Planner

RE: Short-Term Rental Zoning Regulation – Data Check In

At the September 9, and November 4, 2021 work sessions, staff presented data on the local STR environment per the request of the Commission. A broad-level discussion on city-wide trends was held in September (PPT), and a more detailed dive into specific properties and their operational types/business models (e.g. owner hosted versus “superhost”ed), and neighborhood concentrations was held in November (memo).

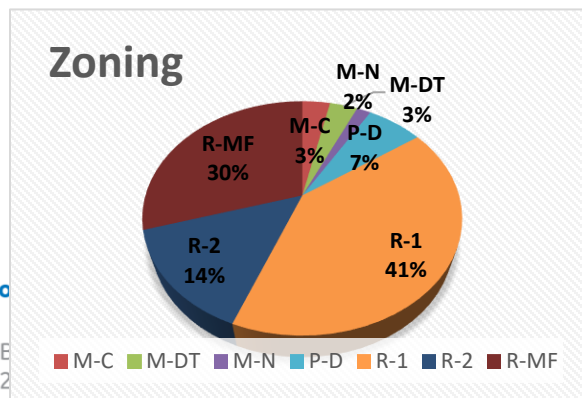
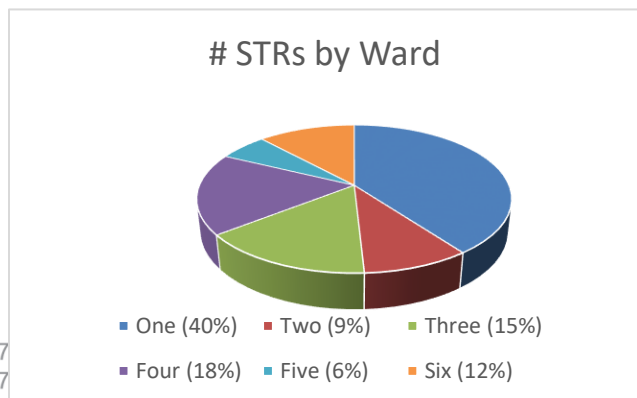
For this work session, staff has broadly reviewed of both the big-picture trends (mostly AirDNA platform data, which includes AirBnB and VRBO) and the individual listings on the AirBnB website to describe the current landscape of STRs in May of 2022.

As in previous data updates it should be noted the intent of the information gathering is not enforcement-related, but an attempt to provide the Commission information they desire to “right size” regulations based upon how this new use type exists within our community.

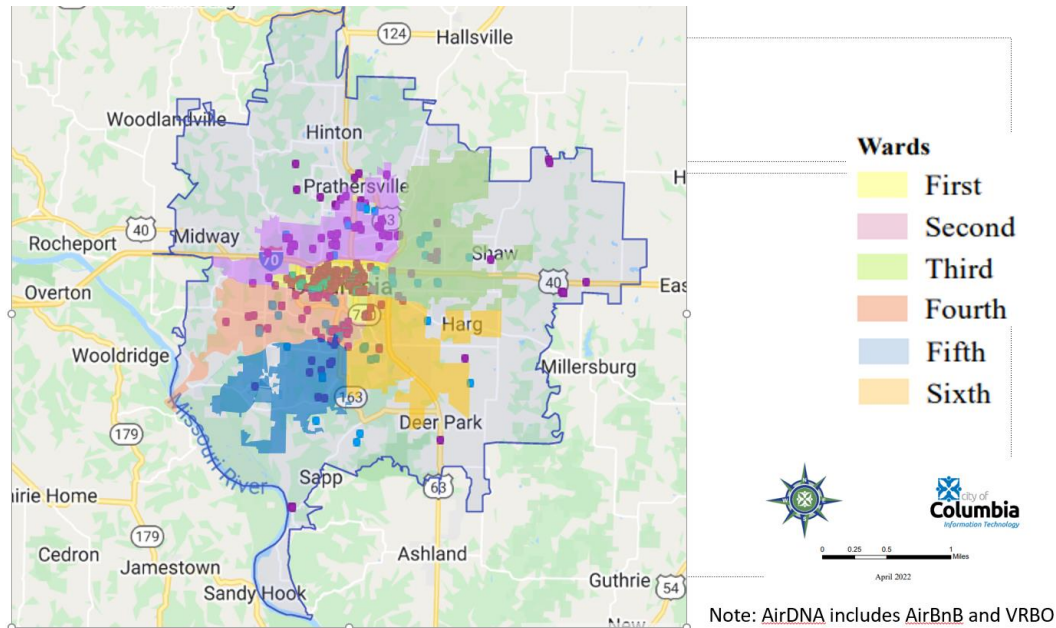
Big picture take-away from this data dive:

- Most STRs operating today appear to be the ones operating in September. There has been some growth but staff believes some seasonal adjustments impact this as we are at the tail end of the graduation season when collecting this data. There are 13 (260) more “stays” on the AirBnB website than in November (247). There are 37 (280) additional listings on AirDna Marketminder website than in September (243). Some have left the market and some new have been added but overall many are consistent operators.
- Staff believes given the relative stability of the STR listings, that the zoning, neighborhood concentrations, and dispersal among wards is pretty similar to those presented in the November 2021 memo.

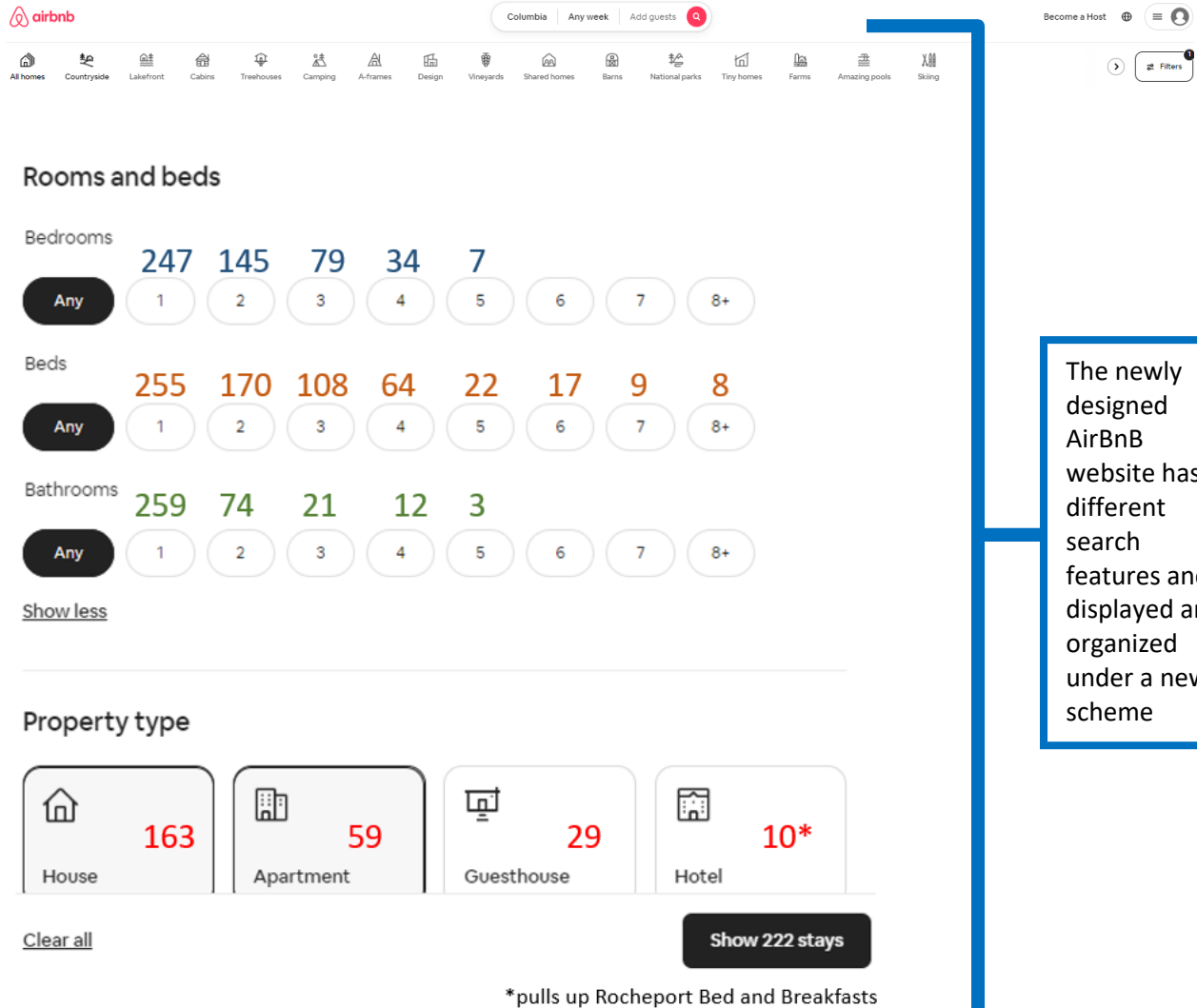
2021 memo data:



- The platforms continue to show “Columbia” based upon a larger geography (postal address?) than the City Boundary. As such, staff has mapped the city limits and by ward and generally overlaid the locations of STRs for review.



- While the operational types discussed in the November memo remain similar, the growth in new operators mostly appears to be “entire home” rentals as the number of these has gone up while the number of private rooms is relatively stable between the fall and now.
- The “market grade”, average daily rate, occupancy rate and revenue varies seasonally and all but occupancy are higher today than in the fall (AirDna).
- The three “superhosts” identified in November are still operating out of multifamily structures (105 N. Garth, 1211 University Avenue and 1621 Ashland Road).
- The AirBnB website has been completely redesigned (see graphic on following page), so some data points we previously collected are not obviously available now, but additional data is available via the new search functions. This search functionality will be useful moving forward with ordinance development and future enforcement activities. I have placed numbers over the black and white search feature that show the number of bedrooms, beds, bathrooms and property type to show the numbers which are populate by each relative filter.



airbnb Columbia Any week Add guests

Become a Host

Filters

Rooms and beds

Bedrooms

Any	1	2	3	4	5	6	7	8+
247	145	79	34	7				

Beds

Any	1	2	3	4	5	6	7	8+
255	170	108	64	22	17	9	8	

Bathrooms

Any	1	2	3	4	5	6	7	8+
259	74	21	12	3				

[Show less](#)

Property type

House	Apartment	Guesthouse	Hotel
163	59	29	10*

[Clear all](#) [Show 222 stays](#)

*pulls up Rocheport Bed and Breakfasts

The newly designed AirBnB website has different search features and is displayed and organized under a new scheme

Should you have questions, please contact me.

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