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Insights into short-term rental accommodation: history, statistics and landlord perspectives



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Acronyms and abbreviations used in this report

ACT	Australian Capital Territory
AHURI	Australian Housing and Urban Research Institute
GIS	Geographical information systems
LGA	Local government area
NSW	New South Wales
NT	Northern Territory
PIPA	Property Investment Professionals of Australia
Qld	Queensland
SA	South Australia
STRA	Short-term rental accommodation
Tas	Tasmania
Vic	Victoria
WA	Western Australia

Glossary

A list of definitions for terms commonly used by AHURI is available on the AHURI website ahuri.edu.au/glossary.

Executive summary

Key points

- Short-term rental accommodation (STRA) refers to properties rented out for three months or less—often through online platforms such as Airbnb.
- This report examines how STRA has changed over time, particularly since the advent of online platforms and in response to the Covid-19 pandemic. It explores landlords' perceptions and the factors influencing their decisions to move properties into or out of the STRA market.
- The report identifies several key STRA trends:
 - There are now more STRA listings for entire, non-hosted homes than there are for hosted STRA, in which residents share their principal place of residence with visitors. Non-hosted STRA can reduce the availability of long-term rental housing by converting residential properties into tourist accommodation.
 - Non-hosted STRA is increasingly concentrated in regional tourist towns, whereas growth in capital cities has slowed or declined.
 - The STRA sector is becoming more professionalised. There is a growing presence of multi-property owners and increased use of professional property managers.
 - The ongoing housing crisis has intensified pressure on policy makers to manage the impacts of STRA upon housing affordability and availability.

- **Regarding STRA landlords, our research finds that maximising profits is a primary incentive, while costs can act as a deterrent; some landlords value the social benefits of STRA; and other landlords are concerned about the broader impact of STRA on housing markets.**
- **Regarding policy and regulatory considerations, we find that:**
 - **Local governments are best positioned to apply STRA-related regulations where needed, as STRA impacts are highly localised.**
 - **State and territory governments should support local governments by implementing STRA registration systems. This already occurs in New South Wales, Western Australia and some local government areas.**
 - **Accurate and consistent registration data helps councils enforce existing rules and determine whether additional STRA regulation is required.**

Australia is experiencing a rental affordability crisis. The conversion of properties from the private rental sector to the STRA sector is one contributing factor—particularly in popular tourist regions. The Australian STRA market is lightly regulated by international standards. To develop effective legislation, it is crucial to understand both the changing dynamics of STRA, and the decision-making processes of property owners. This report examines changes in the STRA market, particularly since the advent of online platforms and in response to the Covid-19 pandemic. It also explores STRA landlords' perceptions of STRA.

Key findings

STRA can benefit businesses, landlords and residents who rent out rooms or homes. However, STRA properties are heavily concentrated in tourist areas, where they can:

- drive up rental costs
- displace long-term residents
- strain local infrastructure
- create social pressures through increased tourist numbers.

There are also concerns about the commercial challenges faced by small-scale traditional accommodation providers. Community views on STRA are polarised, and policy makers face significant challenges in regulating the market. This means that effective regulation must be flexible and responsive to local conditions.

The STRA sector has expanded globally over the past two decades, driven by online platforms. Airbnb alone is now larger than traditional hotel chains such as Hilton, with more than 5 million listings worldwide (La, Xu et al. 2021). In Australia, an estimated 251,000 dwellings are being used for STRA (Sas 2022: 16)—this is approximately 2.3% of all homes and 7.6% of all rental properties.

This project examined changes over time in STRA in Australia to inform future policy options. These are outlined below.

Changes in STRA are highly localised

Stakeholders selected for their specialised knowledge about STRA were interviewed for this research. They observed intensifying pressure to limit STRA sector impacts on housing markets. The most significant shift was the growing housing pressure faced by communities.

The need to manage the impact of STRA on housing availability and affordability has intensified, regardless of whether STRA density has changed in specific areas. Local government policy makers reported concerns from their communities that transient STRA populations erode community cohesion. At the same time, state and federal regulatory and planning frameworks provide little support for local governments to manage STRA.

Changes in STRA density varied both across and within some local government areas (LGAs). For example, some policy makers described suburbs in their LGAs where up to half of all housing is used for STRA, whereas neighbouring suburbs had not seen sharp increases. In other LGAs, the changes in STRA appear to be primarily a shift of property management from local agencies to online bookings, and a new use for holiday houses that were previously often vacant. These impressions were difficult to quantify with the available data. Stakeholders were also frustrated by a lack of access to quality STRA data.

Industry stakeholders highlighted ways that STRA benefits communities, by:

- creating local employment
- supporting businesses
- providing short-term emergency accommodation for households.

Another observed trend is that STRA has professionalised over time, with higher standards of accommodation offered. It is also now common for STRA to be managed and maintained by third parties.

There are now more non-hosted STRA than hosted STRA properties in Australia

The overall number of STRA listings in Australia decreased between 2019 and 2023. However, in the same period the number of non-hosted STRA increased:

- 2019: non-hosted STRA properties were 45% of all STRA
- 2023: non-hosted STRA properties were 58% of all STRA.

While well over three-quarters (83.16%) of STRA owners still have only one STRA property, the data show an increase in STRA listings by owners or third-party property managers who list eight or more properties. However, it is not possible to accurately differentiate between multiple property owners and third-party property managers from the data.

STRA rose sharply in regional areas, but declined in capital cities

Across 13 LGAs analysed, non-hosted STRA saw the strongest growth in regional tourist areas between 2019 and 2023. The largest increases were recorded in:

- Bass Coast: 29.65%
- Whitsunday: 29.02%
- Mornington Peninsula: 28.15%
- The Barossa: 27.55%
- Victor Harbor: 27.2%.

In contrast, growth was much lower in capital city LGAs, with Sydney, Melbourne and Brisbane all recording declines.

Different perspectives shape STRA participation decisions

Owners associate STRA with a higher workload compared to other property owners—but also higher profitability. In addition to varying perceptions of workload and profitability, STRA owners were more likely to see STRA as being at lower risk of property damage than long-term rentals.

This study identified three types of STRA owners based on shared perspectives. Financial benefits are a key driver for property owners to rent in the short-term rather than long-term rental market, but their ownership decisions were also affected by other values and experiences.

The three groups are outlined below.

- **Investment-focussed**—economically rational decision-makers, with a strong focus on financial costs and benefits. They also valued the flexibility to use their STRA property occasionally.
- **Social connection**—owners who enjoyed hosting and forming personal connections with guests.
- **Ethical and economic considerations**—owners who appreciated the higher income that STRA provided compared to long-term rentals, but had concerns about housing market impacts.

Policy development options

The growth of non-hosted STRA has increased pressure on policy makers to manage STRA participation—especially in regional tourist areas. Our research shows that STRA is changing: it is becoming more professional and is increasingly concentrated in regional tourist towns. The research also shows that the STRA sector is made up of owners with diverse perspectives that shape their participation in either the STRA or long-term rental markets. These findings raise several policy implications, which are outlined below.

Supporting local governments to manage STRA

Local governments are best placed to manage STRA, but they need stronger support from higher levels of government. This entails:

- consistency in planning schemes. State and territory governments should:
 - establish a nationally consistent definition of STRA
 - allow LGAs to designate new residential developments for long-term housing only.

- tailored policy options. State and territory governments should:
 - provide evidence-based policy options tailored to different STRA densities, local demographics and housing stock.

Implementing nationally consistent, state-based STRA registration

Accurate data are critical to inform effective policy development. This requires:

- introducing mandatory STRA registration across Australia, with proactive compliance checks
- collecting key information—such as hosted/non-hosted status, and the use of third-party management agencies.
- making registration data accessible to local governments to support monitoring and enforcement.

Our research found broad support for STRA registration among policy makers and STRA industry representatives.

Regulating professional STRA property managers

- Professional STRA managers are increasingly influential.
- Regulatory frameworks could require managers to ensure compliance—similar to real-estate obligations in long-term rental markets.

Exploring voluntary STRA reduction appeals

Jurisdictions aiming to moderately curb the growth of STRA may benefit from encouraging voluntary compliance through appeals to community values or shared responsibility, as:

- some STRA owners may respond to voluntary appeals to shift properties back to the long-term rental market—especially those motivated by ethical considerations
- initial evidence from LGAs suggests that such appeals may have some positive impact.

Measuring STRA owner perspectives to tailor policies

- This study identified features of STRA owner types that may influence their responses to different policies:
 - **Investment-focussed:** Sensitive to price signals. More likely than other groups to state that they would exit the STRA market on introduction of financial deterrents. Also most likely to object to financial deterrents.
 - **Social connection:** May be less sensitive to financial deterrents because they value non-financial benefits of STRA.
 - **Ethical and economic considerations:** Supportive of regulation; unlikely to exit STRA even if taxed.

The study

Previous research has shown that financial reasons are the most common motivator for STRA participation, but non-financial factors also play a role (Crommelin, Troy et al. 2018; Karlsson and Dolnicar 2016). Non-financial motivations for STRA include social benefits, less wear and tear on the property, and the joy of sharing a beloved area.

This project expands on previous research to provide an overview of STRA in Australia, examining landlords' business models, motivation, constraints, property types and locations. The project also examines how STRA has changed over time in capital cities and strategic tourist locations.

The research was guided by three research questions:

1. How has STRA changed since the advent of sharing platforms such as Airbnb?
2. What are the characteristics of STRA properties and owners in Australia? How does STRA vary across Australia?
3. What are the key constraints, motivations, and viewpoints of landlords in the STRA market?

The research involved four components, as outlined below.

Practitioner interviews

Interviews were conducted with 15 people whose work gives them specialised knowledge of STRA in Australia. These included:

- local government policy makers working on local laws, land-use planning, housing affordability, and economic development in councils that had enacted STRA-related regulations
- representatives of STRA industry peak bodies
- STRA and long-term property managers
- a state government policy maker.

These semi-structured interviews focussed on changes in STRA over time, particularly the effect of the Covid-19 pandemic and the advent of online platforms such as Airbnb. The interviews discussed regulation and challenges of STRA.

Secondary data analysis

Web-scraped Airbnb data from 2019 and 2023 was used to identify trends in STRA in several capital cities and strategic tourist locations. In addition to numbers of STRA properties, the analysis includes trends in characteristics of STRA, such as hosted or non-hosted, numbers of listings per landlord, property types, sizes, and locations. Geographical information systems (GIS) was used to map STRA listings and changes over time.

Property owner survey

Property Investment Professionals of Australia (PIPA) conduct an Annual Investor Sentiment Survey of their membership. At our request, several questions were added to the 2024 survey for this study, to measure attitudes towards STRA (see subsection 1.4.3).

STRA owner Q-methodology interviews

Fourteen current and former owners of STRA properties in Australia completed a Q-sort and accompanying interview about their perspectives on STRA. Q-methodology combines qualitative and quantitative research techniques to identify and analyse the range of viewpoints or subjective opinions on a particular topic. This allows researchers to categorise respondents according to shared perspectives.

1. Introduction

- **STRA regulation in Australia is relatively light compared to international approaches.**
- **Online platforms like Airbnb have driven significant growth in the STRA sector, including entire homes that are removed from the long-term housing market and used full-time for short stays.**
- **STRA impacts are highly localised. The most severe effects on housing pressures and community cohesion occur in urban centres and popular tourist destinations.**
- **To develop effective and locally appropriate policies, it is important to understand STRA in different contexts.**
- **This project aims to map the volume of STRA properties, where they are located, how the market is evolving, and why property owners move properties into and out of the short-term rental market.**

1.1 Why this research was conducted

The short-term rental accommodation (STRA) sector is growing, and its impact on communities is becoming increasingly significant.

STRA refers to lodging options that are rented out for relatively brief periods, typically ranging from a few nights to a few weeks, as opposed to long-term leases or traditional hotel stays. The STRA market has grown over the past two decades since the advent of platforms such as Airbnb, which launched in 2008. This increase in STRA can impact housing affordability, communities and hospitality businesses—especially in areas with a high concentration of STRA.

STRA platforms like Airbnb have positioned themselves as champions of the sharing economy, as they enable individuals to rent out their homes while on holidays, or to offer rooms in their primary residences.

However, as the popularity of STRA has surged, there has been a trend towards listing entire properties on the STRA market on a full-time basis. This includes:

- 'mega-hosts' who own or oversee numerous STRA properties
- 'ghost hotels' where multiple rooms in a single property are listed simultaneously (Ibrahim, Lloyd-Cape et al. 2023).

These full-time STRA properties have distinct impacts on housing markets and communities compared to rooms in primary residences, or properties that are listed on the STRA market for a short time while residents go on holiday.

Concerns surrounding the surge in STRA primarily revolve around three key issues:

1. Housing unaffordability and unavailability for long-term residents.
2. Repercussions stemming from an influx of tourists.
3. Implications for small-scale providers of traditional tourist accommodation.

These issues are discussed below.

Housing unaffordability and unavailability

STRA has been identified as a contributing factor to the escalation of housing prices, particularly affecting renters, in regions with high STRA density (Chang 2020; Garcia-López, Jofre-Monseny et al. 2020). STRA has intensified the ongoing international trend of housing financialisation, whereby housing is increasingly viewed and utilised as a profit-generating asset rather than as a basic human need (Burke, Nygaard et al. 2020).

While hosted STRA may help residents to cope with housing unaffordability (Wegmann and Jiao 2017), research conducted in Sydney suggests that mitigating housing unaffordability is not a prevalent motive for engaging in STRA, even in prime tourist destinations (Gurran and Phibbs 2017). In places like Byron Bay, there seems to be a cycle of residents resorting to STRA to offset housing costs that are exacerbated by the high density of STRA in the housing market (Gurran, Zhang et al. 2020).

Households benefiting from hosted STRA tend to be relatively affluent, as STRA landlords need to be digitally literate and own properties that appeal to tourists (Alizadeh, Farid et al. 2018). Households and neighbourhoods that benefit from STRA are disproportionately white (Alizadeh, Farid et al. 2018; Gold 2019).

The distribution and effects of STRA vary significantly. Typically, STRA clusters around urban centres, tourist hubs, and amenities such as restaurants (Ioannides, Röslmaier et al. 2018). Consequently, the impact of STRA on housing affordability is most pronounced in these areas (Garcia-López, Jofre-Monseny et al. 2020). The community impacts of STRA are also localised. In some areas with existing tourist infrastructure, STRA can diversify tourism offerings without negatively affecting the community. However, conflicts between tourists and residents are common in areas that have high STRA density or no prior history of tourism (Gurran, Zhang et al. 2020).

Crommelin, Troy et al. (2018) argue that whole-property listings that are available for rental for more than 90 days per year are likely to significantly affect the availability of rental housing in a specific area. Therefore, this report focuses on these non-hosted STRA landlords.

Repercussions stemming from an influx of tourists

Beyond the gentrification of housing, the affordability of shops and services in high-density STRA areas can also be compromised—which further marginalises permanent residents (Ibrahim, Lloyd-Cape et al. 2023; Rozena and Lees 2021). STRA can also pose challenges for remaining long-term residents, through noise and antisocial behaviour (Celata and Romano 2020; Gurran, Zhang et al. 2020).

In some cases, the proliferation of STRA has resulted in a decline in social capital (Nieuwland and van Melik 2018). Researchers have linked STRA to higher crime rates, which some attribute to reduced social cohesion (Ke, O'Brien et al. 2021). Other researchers argue that increased robbery, theft and violence is driven by new opportunities rather than weakened social ties and community control (Lanfeair and Kirk 2024).

However, STRA can also have positive community impacts. It is associated with more authentic interactions between visitors and locals, and fosters a higher degree of destination loyalty than traditional tourism (Muschter, Caldicott et al. 2022). STRA can also provide surge capacity and a source of income for residents in places that have short tourism spikes—for example, during festivals or events (Gurran, Zhang et al. 2020; Wegmann and Jiao 2017).

Implications for small-scale providers of traditional tourist accommodation

Apart from its impact on residents, STRA platforms enable individual property owners to directly compete with commercial accommodation providers. This dynamic can disadvantage commercial operators, who face greater operational expenses and regulatory requirements than individual STRA landlords. Providers of budget-friendly accommodation are particularly vulnerable to this uneven competition from STRA landlords (Muschter, Caldicott et al. 2022).

STRA can decentralise tourism by accommodating tourists outside of traditional tourist zones. While this can cause touristification, it can also benefit local restaurants and other businesses (Shabrina, Buyuklieva et al. 2020).

STRA landlords' decisions shape the sector

Property owners are the primary decision-makers about when and how properties are listed in the STRA market. Therefore, in order to develop policies that limit the negative community impacts of STRA, it is critical to understand the business models, motivators and constraints of different types of STRA landlords—including where those landlords' properties are located. For example, the factors that shape landlord decisions differ for properties in strategic tourist locations, other rural and regional areas, capital cities, and suburban locations.

The business models and perspectives of landlords in the Australian STRA market are not yet well understood.

1.2 Policy context

1.2.1 STRA policies internationally

The expansion of STRA has presented regulatory hurdles in many urban and regional areas. Policy makers craft STRA regulations to address different concerns, including:

- ensuring fair competition with traditional tourism operators
- taxing the STRA sector appropriately
- mitigating adverse community effects such as overtourism, housing affordability challenges, and issues related to noise, waste and traffic congestion (Nieuwland and van Melik 2018; Wessel, Schmidt-Kessen et al. 2024).

Meaningful regulation of STRA requires proactive enforcement by dedicated staff (Wegmann and Jiao 2017). However, STRA legislation is difficult to enforce due to the large number of small operators—hence, non-compliance is a significant issue (Gold 2019; Wessel, Schmidt-Kessen et al. 2024).

Governments regulate STRA to varying levels. Some governments take a laissez-faire approach with little to no specific regulation of STRA, or minimal requirements, such as fire safety precautions—for example, San Diego and Washington DC (Furukawa and Onuki 2019). Other governments can enact outright bans on STRA—for example, Anaheim in California (Nieuwland and van Melik 2018). However, complete bans on STRA are extremely rare. More commonly, governments impose various restrictions on STRA.

Governments have a range of regulatory tools at their disposal to directly control STRA activity. These include:

- implementing policies to restrict the maximum number of guests permitted to stay in a STRA property at any given time
- imposing limits on the number of days per year that a property can be used for STRA purposes (Furukawa and Onuki 2019).

London, for example, has a 90-night annual STRA limit. But this limit has proven difficult to enforce as hosts are not required to report to regulators, and STRA platforms have resisted sharing data (Ferrerri and Sanyal 2018).

Additionally, governments may opt to restrict or prohibit STRA in specific districts to safeguard the character of neighbourhoods—particularly those with historical significance. For instance, STRA is prohibited in the French Quarter of New Orleans and the Old Town in Barcelona (Nieuwland and van Melik 2018). Barcelona has announced plans to extend the ban city-wide by 2029 (ABC News 2024).

Regulations can also differentiate between hosted STRA and non-hosted STRA, with lenient regulations for households who rent out rooms in homes they live in, or put their house on the STRA market when they go on holidays.

Strategies to minimise non-hosted STRA include:

- banning it altogether
- limiting the number of nights per year that a whole property can be listed on the STRA market
- requiring the STRA host to be resident in the property for a set number of nights per year
- imposing an additional tax on non-hosted STRA
- prohibiting individuals from having multiple STRA listings (Gold 2019; Ibrahim, Lloyd-Cape et al. 2023; Nieuwland and van Melik 2018; Wegmann and Jiao 2017).

Some regulations do not place limits on the volume of STRA activity—for example, requirements to maintain standards of hygiene, or to provide contact details to neighbours (Nieuwland and van Melik 2018).

Many jurisdictions require STRA landlords to obtain a licence. Licence fees help governments to meet the costs of managing the community impacts of STRA or enforcing regulations (Phibbs and Ely 2022a). They also assist with collecting data about STRA activity. High licence fees can also discourage uptake of STRA (Furukawa and Onuki 2019).

Similarly, many governments have specific taxes for STRA. For instance, New Orleans imposes a STRA occupancy tax, with proceeds allocated to housing improvement projects (Gold 2019). Conversely, governments can also use STRA to incentivise long-term housing—for example, Hawaii introduced a temporary tax amnesty for STRA landlords who transitioned STRA properties into long-term residences after the 2023 fires severely reduced housing supply (Senate 2024).

In addition to regulations targeting STRA providers, some cities have enacted regulation of STRA platforms by requiring them to:

- remove unregistered STRA providers
- share STRA-listing data (Ibrahim, Lloyd-Cape et al. 2023).

However, platforms such as Airbnb have aggressively resisted regulation (Gurran and Sadowski 2019).

1.2.2 STRA policies in Australia

The Australian STRA market is lightly legislated by international standards (Gurran and Phibbs 2023), with few regulations to limit its volume or density (Ibrahim, Lloyd-Cape et al. 2023). However, Australia is experiencing a crisis in affordable housing—particularly affordable rental housing (Reynolds, Parkinson et al. 2024). In response to this housing affordability crisis, some state and local governments have initiated measures that aim to regulate volumes of STRA. Table 1 summarises state and territory government STRA regulations.

State and territory policies

The New South Wales Government has a code of conduct for STRA and requires registration of all STRA properties, with a \$65 registration fee. New South Wales also limits non-hosted STRA to a maximum of 180 days per year in a small number of local government areas, with a 60-day limit in Byron Shire (Department of Planning 2024). There is evidence of significant non-compliance with these limits, with over 20% of listings in both Sydney and Byron Shire exceeding 180 nights booked in a year (Ibrahim, Lloyd-Cape et al. 2023). In many cases, STRA can comply with these limits and still be more profitable than long-term rental—even if the property is left vacant when it is not rented as STRA (Ibrahim, Lloyd-Cape et al. 2023).

Tax settings are largely the same for STRA and long-term rentals, but STRA owners often claim a wider range of deductions. Both types of landlords can deduct management and advertising fees, though these are usually higher for STRA due to frequent guest turnover. STRA owners may also deduct costs for guest check-ins and cleaning between stays. In addition, both STRA and long-term landlords can claim depreciation on assets such as appliances and curtains. Unlike most long-term rentals, STRA properties are usually furnished, which enables deductions for depreciating furniture.

The Victorian Government introduced a STRA levy from 1 January 2025 (Phibbs and Gurran 2023). The levy is 7.5% of the total booking fees paid, including charges such as cleaning fees and GST. Booking platforms, owners or tenants who collect STRA fees are required to pay the levy. The levy is not applied to hosted STRA. The revenue generated by the STRA levy is invested in Homes Victoria, to fund social and affordable housing (Victorian Government 2023).

The Tasmanian Government requires planning permits for non-hosted STRA. STRA landlords are required to provide permit information to STRA platforms. However, implementation is uneven across different local government areas (Department of Consumer Building and Occupational Services 2019). Councils have limited power to refuse applications for STRA permits (Phibbs and Ely 2022b).

The West Australian Government offers a \$10,000 incentive for STRA landlords to transfer their properties into the long-term rental housing market for at least 12 months. The West Australian Government has also proposed requirements such as registration of all STRA properties, and development approval for properties rented on the STRA market for more than 90 nights in 12 months within the Perth metropolitan area. Outside of the metropolitan region, local governments are required to use standardised definitions for STRA in local planning schemes, but have the flexibility to designate STRA as they see fit (Department of Planning, Lands and Heritage 2024).

The Queensland Government commissioned a review of STRA. It concluded that:

- STRA has a limited impact on rental affordability
- statewide restrictions were not appropriate given the uneven distribution of STRA, which is concentrated in high-tourism coastal areas.

The Queensland Government is considering creating a STRA register (Miles 2023). At the time of writing, South Australia, the Northern Territory and the Australian Capital Territory do not restrict STRA.

Local government policies

Some local governments—particularly in areas that are heavily affected by STRA—have implemented policies to either:

- manage the community impacts of STRA, or
- encourage STRA landlords to transition their properties into the long-term rental sector.

One mechanism available to local governments is differential rating, which involves charging higher rates for properties used for STRA purposes. For instance:

- Hobart imposes higher rates on both STRA properties and vacant residential properties (City of Hobart 2024)
- Brisbane charges higher rates for STRA than for other properties (Brisbane City Council, n.d.b).

In addition to differential rating, Brisbane City Council has specific planning scheme requirements for STRA, which is allowed in central zones near tourist, cultural or shopping facilities. Outside these zones, STRA applications are assessed to ensure minimal negative impact on residents and businesses (Brisbane City Council, n.d.a). Similarly, The Barossa Council in South Australia uses the planning scheme to manage STRA by requiring planning approval for any tourist accommodation. It treats STRA the same as motels or traditional B&B establishments, which means they must comply with safety standards such as water quality and pool safety (The Barossa Council, n.d.).

Other local governments like the City of Frankston, Mornington Peninsula Shire and Bass Coast Shire (all in Victoria) have enacted local laws that place the responsibility for occupant behaviour upon property owners. These laws necessitate:

- STRA property registration
- contact details for prompt complaint response
- measures to safeguard amenity for neighbours of STRA properties—including waste management, off-street parking, noise control, and restrictions on night-time use of outdoor spaces (Frankston City Council 2020; Lenton-Williams 2023).

Table 1: STRA regulation in Australia, by jurisdiction

Jurisdiction	Registration	Levy/tax	Planning/ development approval (statewide or in certain LGAs)	Zoning/ land use	Strata can ban STRA	Code of conduct/ safety standards	Nightly caps in certain LGAs	Require data- sharing by platforms
ACT								
NSW								
NT								
Qld								
Tas								
SA								
Vic								
WA								

Source: Adapted from Craig-Jones (2024).

1.3 Existing research

The growth of STRA

The sudden expansion of the STRA market—along with the ensuing business and community impacts and policy attempts to manage those impacts—has led to a burgeoning body of research examining STRA (Sainaghi 2020). Most STRA research focuses on Airbnb (Berry 2010; Dann, Teubner et al. 2019; Ding, Niu et al. 2023; Guttentag 2019; La, Xu et al. 2021). Research themes include Airbnb as a corporation; the impacts of STRA on housing markets, communities and the tourism sector; and guest preferences (Ding, Niu et al. 2023; Guttentag 2019).

Research examining hosts' motivations and preferences is uncommon (Guttentag 2019; Sainaghi 2020).

Globally, the STRA market has grown in size and impact over the past two decades. Airbnb alone is now larger than traditional hotel chains such as Hilton, with more than 5 million listings worldwide (La, Xu et al. 2021). In Australia, an estimated 251,000 dwellings are in the STRA market, which is approximately 2.3% of all dwellings and 7.6% of all rental dwellings (Sas 2022: 16).

Non-hosted properties make up a significant portion of the STRA market, and comprise:

- 44% of all STRA in Melbourne
- 29% of all STRA in Sydney (Crommelin, Troy et al. 2018).

The distribution of STRA across Australia

Non-hosted STRA takes up a small proportion of all properties in the housing market. An Airbnb-commissioned report (Urbis 2024) places non-hosted STRA in different Australian states at between 0.2–0.5% of all housing. Urbis's definition of non-hosted STRA excludes properties in the STRA market for less than 180 days a year, rather than the 90 day threshold used by Crommelin, Troy et al. (2018), Sas (2022) and in this report. However, STRA is highly localised. STRA properties are predominantly located in:

- city centres
- strategic tourist locations
- regions with a high density of young people
- around tourist attractions (Sainaghi 2020).

There are more than 10 LGAs across Australia where non-hosted STRA takes up at least 10% of all housing stock (Urbis 2024).

Even within LGAs, STRA can be unevenly distributed. For example, Byron Shire is one of the LGAs with high levels of non-hosted STRA. Within Byron Shire, New Brighton has almost a quarter (23.9%) of all homes listed on Airbnb (as hosted or non-hosted listings), which is almost twice as many as in neighbouring Brunswick Heads (12.3%) (Ibrahim, Lloyd-Cape et al. 2023).

STRA landlords' perceptions and motivations

While research examining STRA landlords' attitudes and behaviours is limited, it is clear that STRA landlords are motivated to participate in STRA for financial and social reasons, and that financial motivations are more prevalent (Guttentag 2019). While financial and social motivators are present among STRA landlords, social motivators may not be evenly distributed across different modes of hosting, given that non-hosted STRA landlords have limited opportunities for social interaction with their guests (Schor and Attwood-Charles 2017). However, some studies have shown that social and financial reasons motivate Airbnb hosts, even in non-hosted STRA (Dann, Teubner et al. 2019).

Two studies have identified both financial and social motivators for STRA providers in Australia. A study of STRA in Sydney and Melbourne found that additional income was the most common motivator for STRA landlords, followed by helping to cover the cost of owning or renting a home, then social motivators such as meeting new people, giving others the opportunity they had while travelling, and having company in the home (Crommelin, Troy et al. 2018). STRA landlords also perceived other benefits of renting in the STRA market compared to the long-term rental market, such as less wear and tear, and greater flexibility over their use of the property. A 2016 survey of Australian STRA providers by Karlsson and Dolnicar identified three categories of motivators. These are listed in order of frequency:

1. Financial reasons—using STRA income to cover essential living expenses, or using STRA to invest in a secondary property in a desirable tourist location.
2. Social reasons—primarily the opportunity to meet people from different places.
3. Sharing—utilising unused space, or sharing the experience of being in a beloved part of the world (Karlsson and Dolnicar 2016).

As well as the numerous benefits, researchers have identified several disadvantages (or disbenefits) of STRA for landlords, including:

- concerns about security and online payments
- stress and labour involved in providing a tourist experience within the home—a previously private space (Malazizi, Alipour et al. 2018; Roelofsen and Minca 2018)
- owning a STRA can blur the lines between work and family, creating work–family conflict for some STRA providers (de Janasz, Kim et al. 2022).

Several studies have examined how STRA providers would use their properties if they were removed from the STRA market. Overall, the results indicate that policies to reduce STRA would encourage some—but not all—STRA providers to return properties to long-term housing markets (either long-term rental or owner-occupation).

A survey of Airbnb hosts in Sydney and Melbourne found that the majority (56%) would rent out their property another way if Airbnb ceased to be viable or no longer lucrative. This result was more pronounced (62%) among respondents who rented out whole properties (Crommelin, Troy et al. 2018).

Interactions between STRA and long-term housing markets

In a 2024 study commissioned by Airbnb, Australian Airbnb hosts were asked how non-hosted STRA properties were used before they were placed onto Airbnb (Urbis 2024):

- less than a fifth (16%) of properties had previously been in the long-term rental market
- a third (29%) of properties had been lived in by the owner or a family member—which means that almost half (45%) of properties had provided long-term accommodation before entering the STRA market
- a quarter (25%) of properties were brand new (6%) or purchased and immediately listed (19%)
- a quarter (25%) of properties were previously used as holiday houses (18%) or other uses (7%).

Forty per cent of non-hosted Airbnb landlords indicated that they would keep their property for use by family and friends if it were no longer used for STRA.

In addition to non-hosted STRA removing entire properties from the long-term housing market, a survey in the ACT indicates that hosted STRA may remove long-term accommodation from share houses. When asked how they would use the property if it were removed from the STRA market, almost two-thirds of STRA providers reported that they would rent it out on the long-term market (63% of those who rented out single rooms, and 65% of those who rented out whole homes). A further 7% with single-room STRA and 14% with whole-home STRA reported that they would sell the property. However, these results may not be representative of all STRA providers as they were drawn from a small sample size, with only 11 single-room STRA providers and 27 whole-home STRA providers.

1.4 Research methods

This project draws on multiple methods to answer three research questions.

1. How has STRA changed since the advent of sharing platforms such as Airbnb?
2. What are the characteristics of STRA properties and owners in Australia? How does STRA vary across Australia?
3. What are the key constraints, motivations, and viewpoints of landlords in the STRA market?

This section briefly introduces each research method.

1.4.1 Semi-structured interviews

Practitioner interviews explored how STRA has changed, focussing on the effects of online STRA platforms, Covid-19, and STRA regulations. The interviews covered four themes:

- Changes over time
- Characteristics of STRA
- Challenges for communities
- Regulation.

An interview protocol with example questions is included in Appendix 1.

Fifteen practitioners were interviewed. Table 2 shows the sectors represented. Most participants were from local government (n=8). An additional 35 organisations were contacted but did not proceed to interview. Broader representation from STRA service providers and state government policy makers would enhance the diversity of perspectives. The local government participants represent five local government areas (LGAs) and a variety of disciplines, including local laws, land-use planning, housing affordability and economic development. All LGAs had enacted some level of local law addressing STRA.

Table 2: Practitioner interview participants

Organisation type	Number of participants
Coastal LGA	7
Inner-city LGA	1
STRA industry	4
STRA property management	1
Real estate	1
State government	1
Total	15

Source: Authors.

Participants in practitioner and Q-methodology interviews provided informed consent for the use of their de-identified data.

1.4.2 Secondary data analysis and spatial analysis of Airbnb listing

Quantifying the scale and nature of STRA is challenging in jurisdictions without mandatory registration.

Following methods used elsewhere (Gurran and Phibbs 2017; Rabiei-Dastjerdi, McArdle et al. 2022; Simcock 2023; Wang, Livingston et al. 2024), we analysed data scraped from Airbnb using datasets from Inside Airbnb (insideairbnb.com). Although this approach misses properties listed on other platforms, it avoids double-counting properties listed on multiple sites. Inside Airbnb aggregates, cleans and validates Airbnb data. The datasets have limitations, such as the inability to distinguish between booked and unavailable dates. However, Inside Airbnb has been shown to be a valid data source for research, especially for comparing STRA at different points in time (Wang et al. 2024).

Descriptive statistics were used to examine STRA property types, locations, and the number of properties listed by individuals in January 2019 and January 2023. GIS density mapping was used to show changes in the distribution of STRA in capital city, regional and coastal LGAs.

1.4.3 PIPA annual property investor sentiment survey

Property Investment Professionals of Australia (PIPA) is a professional association for property investors. PIPA granted us access to data from their 2024 Annual Investor Sentiment Survey and allowed us to add several STRA-specific questions:

- How many of your properties are let in the short-term rental market?
- Have you rented a property as STRA? (Thinking about your experiences within the last 5 years)
 - I rent out at least one property as STRA that was previously rented long-term
 - I have at least one property that is consistently rented as STRA
 - I have previously rented at least one property as STRA, but it is now rented long-term
 - I do not and have not rented a property as STRA
- Do you believe that STRA property represents a better return on investment presently than long-term rental accommodation? (higher/lower/unsure)

- How does the risk of property damage in STRA compare to long-term rentals? (higher/lower/unsure)
- How does owning a STRA property compare with owning a long-term rental property? (more work/less work/unsure)

The survey was sent to all PIPA members. The 2024 PIPA survey received 1,288 responses, including 40 from non-owners and 188 (14.6%) who did not answer STRA-related questions. We used descriptive statistics to compare STRA perceptions by participation status and examine the characteristics of landlords entering or exiting the STRA market. While PIPA's voluntary, paid membership likely reflects a specific type of landlord, the survey still offers useful insights into STRA decisions and views.

1.4.4 Q-methodology

Q-methodology was used to systematically analyse landlords' subjective perspectives. Q-methodology uses a by-person factor-analysis technique that groups individuals based on shared viewpoints. The results are not numerically representative of the population, but are used to generate categories that reveal important differences.

Data collection included:

- demographic data, such as the number and location of STRA properties owned by the landlord
- Q-sort activity, where landlords selected statements that represented or did not represent their views and ranked the strength of those views
- in-depth interviews to explore landlords' selections and reasoning.

Fourteen non-hosted STRA landlords were recruited from across Australia. Participants were recruited to represent a variety of locations and property management arrangements, as shown in Table 3. Data were collected via Zoom/Teams, recorded and transcribed.

Table 3: Q-methodology participant demographics

Characteristic	Participant numbers
Gender	9 female, 5 male
STRA location	5 capital city, 4 coastal, 2 other tourist region, 2 non-tourist region, 1 various
Property management	6 outsource all/most, 6 partially outsource, 2 self-manage
Current STRA	9 continuing, 5 discontinued

Source: Authors.

To ensure the statements presented to landlords were locally relevant and captured sufficient variation in perspectives, statements were developed using:

- existing literature on STRA
- data from stakeholder interviews, PIPA survey and *Inside Airbnb*
- media and social media.

Factor analysis was used to determine shared perspectives by identifying clusters of participants with similar viewpoints. Interview data provided deeper insight into landlords' views, highlighting key themes, values, motivators, barriers and attitudes for each factor.

The Q-sort data were processed using KADE (Banasick 2019), an open-source software tailored for by-person factor analysis within Q-methodology. The analysis followed the structured approach outlined by Watts and Stenner (2012), utilising principal component analysis (PCA) with varimax rotation. After testing several factor solutions, a three-factor model was selected as the most meaningful, capturing 54% of the total variance. This decision was based on standard criteria, including eigenvalues greater than 1 and at least two significant loadings per factor, determined using the threshold $p < 0.01$. Significance was calculated following Brown's (1980) formula: $2.58 \times (1 \div \sqrt{\text{number of items in the Q set}})$.

The interpretative process in Q-methodology involves analysing the internal structure of each factor and the relative differences across factors. Distinguishing and consensus statements were identified. Distinguishing statements vary significantly ($p < 0.05$) in their placement compared to other factors, helping define the unique characteristics of each factor. In contrast, consensus statements reflect areas of agreement across all three factors ($p < 0.05$). These classifications help pinpoint points of contrast and shared understandings.

2. Trends in STRA

- The density and impacts of STRA vary dramatically between and within LGAs, and regulatory responses vary accordingly.
- STRA has professionalised over time, with increased standards of accommodation offered and a greater proportion of STRA being managed and maintained by third parties.
- The ongoing national crisis in housing affordability and availability has placed increased pressure on policy makers to measure and manage impacts of STRA on housing markets.
- However, it continues to be difficult for policy makers and the STRA industry to access accurate data about the volume and characteristics of STRA in Australia.
- A registry of STRA properties at the state/territory level would help policy makers make more informed decisions on how to regulate the STRA sector.

2.1 What we already know about changes in STRA over time

Tourism has expanded in recent decades, with international tourist numbers more than tripling globally between 1990 and 2017 (WTO 2018). This trend was halted during the Covid-19 pandemic but by 2023, international tourism had largely recovered to pre-pandemic levels (UN Tourism 2023). STRA has contributed to meeting the increased demand for tourist accommodation—particularly in cities (Garcia-López, Jofre-Monseny et al. 2020). In an era of increasing tourist activity, STRA can have positive impacts on host communities, such as providing surge capacity to accommodate visitors during festivals and other cultural events (Shabrina, Buyuklieva et al. 2020).

While STRA has long formed part of the mix of properties in locations that attract tourists, the advent of online platforms has made it easier for individual households to let properties in the short-term market, which has changed the:

- size and distribution of STRA properties
- ways that the STRA sector interacts with host communities (Bugalski 2020; Reichle, Fidrmuc et al. 2023).

The growth of STRA is set against a backdrop of increasing pressures on the housing system.

In Australia, as in many other countries, house prices have risen faster than wages, making homeownership unaffordable for many people. As a result, the private rental sector now provides long-term accommodation for a growing proportion of the population (Burke, Nygaard et al. 2020). However, private rentals are an unstable source of housing, and rental affordability and availability have deteriorated to a crisis level (Anglicare Australia 2023). Although STRA is only one factor in the housing crisis, there is a global trend towards stricter regulation of STRA to manage its effects on housing markets and local communities.

Policymakers have responded to the growth of STRA in different ways, including:

- banning STRA, or banning STRA in certain districts
- placing caps on the number of STRA properties
- placing caps on the number of nights per year that a property can be listed as STRA (Furukawa and Onuki 2019).
- policy approaches focussing on the quality of STRA, such as safety requirements or regulations about noise or rubbish (Nieuwland and van Melik 2018).

This variation in policy response to the negative effects of STRA are in part a result of the uneven distribution of STRA properties. But it also reflects the widespread uncertainty surrounding the STRA sector's trajectory and the motivations of STRA landlords. Given the gaps in existing knowledge about STRA, there is a need to learn more about:

- who STRA landlords are
- what might reinforce responsible behaviour or incentivise change
- how the negative consequences of STRA growth in residential areas can be mitigated.

2.2 Practitioner perspectives on changes in STRA over time

Fifteen people whose work gives them insights into STRA markets shared their perspectives on changes to STRA over time, characteristics of STRA, challenges of managing STRA, and regulation.

2.2.1 Lack of accurate STRA data

Policymakers require accurate data about STRA to:

- develop appropriate interventions
- estimate the impacts of possible policy changes
- monitor impacts once changes are introduced.

Several local government participants commented on the difficulty of getting accurate data about the number of STRA properties in their region. As one participant put it:

[Accurate data] has been probably the key issue about us understanding our housing supply, because on any one day it will shift when an owner makes a decision to shift a property from short-term to permanent, or permanent to short-stay.

The state government policy maker demonstrated the importance of data monitoring. STRA regulations had been developed in response to data showing a rapid increase in STRA in their state. Inside Airbnb and AirDNA data were used to develop regulations. However, the policy maker believed that STRA registration provides more accurate tracking of STRA numbers and locations than web-scraped data.

Stakeholders working in LGAs with local STRA registration schemes expressed concerns that registration data can underestimate STRA because registration only counts properties whose owners have complied with registration requirements. LGAs that actively monitored compliance needed to employ dedicated staff or engage external consultants to identify unregistered STRA properties.

While policy makers expressed concerns that STRA registration data underestimates the prevalence of STRA, industry representatives expressed concerns that a reliance on web-scraped data can lead to overestimating STRA due to inadequate accounting for properties being listed on multiple platforms, or multiple listings for single properties. For example:

- a single-room listing and a whole-home listing for the same property
- a granny flat listed separately to a house at the same address.

Some STRA representatives also believe that the proportion of hosts that own multiple properties is overestimated because management companies list properties on behalf of many landlords.

To monitor the impacts of online platforms on local housing provision, some LGAs wanted to differentiate between:

- STRA properties that were previously used as holiday houses and left vacant when not in use by owners
- properties that had provided long-term housing prior to STRA.

Establishing the prior use of STRA properties in regions where the planning scheme does not differentiate between STRA and other uses is difficult, perhaps impossible.

2.2.2 Impacts of online booking platforms

While accurate data are difficult to obtain, participants identified some clear trends in STRA, such as growing numbers of STRA properties after the introduction of online booking platforms, although the level of impact varied.

According to one participant from an LGA that had long been a desirable location for second homes for wealthy households, STRA platforms have broadened that market:

[By making it] viable for another group of people to have a second home. If they put it on STRA in high season, a group that couldn't quite afford it before can afford it now.

In other locations, STRA has remained fairly steady and online platforms are simply a continuation of tourism that has always been part of the fabric of the area. One participant noted that: 'These recent issues are not new to us.'

Another participant suggested that they receive few complaints about STRA because it is a variation on existing tourism in the area: *'Before Covid and Airbnb, there were high numbers of backpackers in the area, so perhaps the locals have a high tolerance for a transient population.'*

Some local government participants noted recent anecdotal evidence that STRA listings in their areas may be decreasing for two reasons:

1. The high cost of long-term rentals might make the long-term housing market financially comparable to the STRA market—especially as STRA comes with additional effort and costs, such as cleaning and registration.
2. The STRA market might be reaching saturation.

2.2.3 STRA growth is highly localised

Rates of STRA can vary wildly within an LGA. For example, participants described suburbs near popular beaches where STRA accounts for up to half of all housing stock, while neighbouring suburbs have lower rates of STRA. In the most extreme example, half of all properties in a beachside suburb were used for STRA. In some LGAs, STRA had introduced tourists into previously residential neighbourhoods.

In regions with very high levels of STRA, communities requested local government intervention for two main reasons:

1. A reduction in housing availability and affordability. As one participant stated: *'the housing crisis inherently is linked to stock being taken up by short-term accommodation growth'*.
2. Residents felt overwhelmed by tourists. Residents had complained that large numbers of STRA reduced community cohesion and caused problems—for example, noise and antisocial behaviour.

2.2.4 STRA and the housing crisis

The most significant change for local government is that pressures in the overall housing market have intensified, which has led to increased pressure to quantify and manage the impacts of STRA on housing affordability and availability—particularly in areas with large numbers of STRA properties, or large increases in STRA numbers. One participant summed up the pressure in her LGA thus: *'vacancy rates, prices, homelessness and rental stress are major issues'*.

The housing crisis was a pressing issue in all LGAs represented in this study. As a result, local government participants had observed an increase in community, media and political attention on STRA, and pressure to manage the number of STRA properties in their regions. This included regions where STRA had not greatly increased, and where STRA properties had previously been holiday houses rather than in the long-term housing market. One policymaker argued that in their LGA, *'levels [of STRA] are quite low ... [but] what has increased is community concern'*.

STRA is not the only pressure on housing affordability in towns that appeal to holidaymakers. Houses used as second homes and holiday homes also take properties away from the long-term housing market.

2.2.5 Impacts of Covid-19

Participants reported varying changes to STRA after Covid lockdowns compared with the pre-Covid period. Most local government participants had observed a drop-off of STRA during Covid lockdowns, followed by a bounce back. However, one LGA reported that STRA remained steady throughout the 2020–21 Covid period. Another noted that the rush to purchase or rent regional properties during Covid lockdowns exacerbated housing shortages.

Industry representatives observed that the growth of the STRA sector accelerated after the Covid-19 lockdowns. They attributed this to two main factors:

1. STRA offers more isolation compared to hotels
2. The rise in local travel following Covid lockdowns made STRA an appealing option for travellers:

Covid was a tipping point ... STRA recovered faster [than the hotel industry] due to local travel and providing more isolation. It brought new audiences to STRA ... Families now prefer STRA.

Industry representatives also believed that the rise in working from home has made STRA more attractive to some property owners. STRA allows them to use a regional property as a home office and rent it out when they're not using it, generating extra income. Other industry representatives had observed an ongoing decrease in bookings that had not fully recovered since Covid lockdowns and an increase in last minute bookings, making it more difficult to plan their STRA. Additionally, they reported a recent increase in bookings via online platforms rather than direct bookings, which reduces the profitability of a STRA property.

Another concern reported by industry representatives was an increase in scam guests who either:

- rob the property
- file false complaints for refunds
- blackmail hosts with the threat of poor reviews.

These STRA industry representatives reported that the online platforms provide inadequate protection for hosts, and that some hosts have introduced their own screening procedures.

2.2.6 Professionalisation of STRA

The other change noted by industry representatives is an increasing professionalisation, both in terms of the standard of accommodation offered and the frequency of STRA management by third-party property managers, with improvements in marketing and monitoring of problems in the property:

Historically, people let short-term properties through real estate agencies, whose main function was sales and long-term rentals. The STRA industry was very informal. Usually houses had second-hand furniture and you brought your own supplies, even soap.

The best development is that the industry has professionalised. Technology has taken it to a new level of sophistication. The advent of professional holiday managers means that properties are rented more, providing income for small regional towns, local businesses and workers, and 'experience' businesses [such as tours or adventure activities].

Other STRA industry participants reported mixed impressions of professionalisation. They argued that although many STRA operators are highly professional, online platforms make it easy to place a property onto the STRA market—which increases the number of landlords who do not comply with relevant safety, planning and zoning regulations:

With respect to the compliance, because it's been so easy to jump on these platforms to advertise their properties, the owners just aren't checking with their local government with respect to their regulations.

2.2.7 Characteristics of STRA

The density of STRA is hyper-localised, generally in areas close to beaches or other tourist attractions. However, in some areas, online platforms have facilitated an increase in STRA in neighbourhoods that were previously residential.

Characteristics of properties rented as STRA vary between and even within LGAs. Property types commonly used for STRA in the LGAs represented in these interviews were:

- detached houses—which are favoured by families and party groups
- apartments in resort-style developments
- apartments in predominantly residential developments.

The inner-city council reported that most STRA properties are apartments that are on the STRA market full-time. In contrast, coastal LGAs tended to have a more diverse mix of STRA properties, including:

- holiday houses that are otherwise unoccupied
- full-time STRA properties
- seasonal STRA properties.

In some cases, households move out of their homes during the peak tourist season to take advantage of high STRA prices.

STRA industry representatives identified a variety of property types in the STRA market. In addition to traditional holiday houses, units and apartments, there are granny flats and self-contained units, glamping, motor homes, and regional and rural getaways, including farm stays. Unique properties are also popular, such as yurts or tiny homes.

STRA business models vary too. Industry representatives identified various ways of categorising STRA. For example:

[STRA can be] hosted or non-hosted. Also, part-time and full-time operators. Some people only do it if they're going to go to Europe or something for three months, they'll do it for those three months, or you get FIFO [fly-in fly-out] workers who will own a property somewhere and when they're two weeks off they'll do it for those two weeks, and when they come back they don't necessarily want to do it. There's [also] arbitrage ... where people rent properties and then they list them on booking platforms.

Local government participants could not confidently estimate the proportion of STRA landlords who hold large property portfolios. Their impression was that most properties are held by small-scale investors. Participants gave examples of multi-property landlords in their LGAs, but did not believe this to be the norm. Several participants in coastal councils noted that the majority of STRA properties in their LGAs were held by people who did not live in the area.

Industry representatives agreed that most STRA properties are held by small-scale investors: 'STRA is still very much a family industry, still a family vibe. Most of the owners just have one property—mostly it's their holiday home or a retirement dream.'

2.2.8 Community impacts of STRA

For most LGAs, the initial focus of managing STRA was on amenity issues such as noise, parking and waste. However, the effects of the housing crisis meant that managing the impacts of STRA on the cost and availability of housing had become the priority—particularly in LGAs with high rates of STRA. One participant explained that *‘previously, the focus was on amenity issues in residential areas but now the focus is squarely on housing availability’*.

Some participants felt that removing STRAs in their LGA would not directly free up affordable housing. For example, one policymaker noted that: *‘Houses that are in the STRA market are generally expensive ... [and] so would not be appropriate for affordable housing—but it all impacts availability.’*

Whereas in other areas, many of the properties in the STRA market were smaller dwellings that would be ideal for long-term affordable housing. A policymaker described the situation in their LGA :

A shortage of housing stock in the smaller dwelling type, which a lot [of STRA properties] are ... [and] we’re seeing permanent residents move into resorts because of the lack of other stock.

Some participants noted that there were trade-offs between managing the housing pressures exacerbated by STRA and the economic benefits of additional tourists attracted by STRA. For example:

Tourism is one of our biggest employers, particularly for younger people, so we have to be really careful in managing STRA ... It’s a juggling act between supplying houses for the workforce and having jobs for the workforce.

There were examples of local businesses innovating to provide accommodation for staff, such as investing in housing. One example was a business that created dormitory housing for their staff and rented beds to the staff of other local businesses. However, it was noted that investing in staff accommodation is beyond the reach of the small to medium businesses that predominate in many tourist areas.

In some coastal regions, a majority of STRA properties were previously used exclusively as holiday homes. Several participants noted that families tend not to sell holiday homes. One coastal LGA policymaker explained that *‘[f]amily-held holiday homes stay in a family, they never get sold. They get passed down through the generations.’*

However, the implications of this were interpreted differently, depending on the LGA.

Some participants believed that STRA properties that were formerly holiday homes had never provided long-term accommodation, and therefore restricting STRA should not be a priority in addressing housing affordability and availability.

Other participants argued that if holiday homes would not be transitioned into long-term housing, that only left investor-owned STRA to do so. As such, the priority should be encourage STRA properties back into long-term housing to improve housing availability.

Although housing affordability and availability have become the primary concerns in managing STRA, policy makers continue to address amenity-related issues. Several respondents noted that complaints about amenity problems are often linked to a small subset of STRA properties, commonly referred to as ‘party houses’, and that this has become more difficult with the advent of online platforms. A policy maker explained the shift:

Trying to manage the problem properties was easier [before the advent of online platforms] because they were managed by property managers in town and you could front up to their office the next day. Now, the property is managed by a faceless platform.

Industry representatives note that third-party managers and new technologies enable better management of amenity issues. For example, noise monitors and oxygen monitors can indicate if too many people are staying in a home. Additionally, Airbnb has reduced party houses by banning listings of properties with more than 16 beds.

However, amenity issues addressed by policy makers are broader than the traditionally defined amenity problems of noise, rubbish and parking, arguing that *‘a sense of community is part of amenity. Also, services charging tourist prices or catering to tourists rather than residents impacts amenity’*.

Some policy makers reported that residents complained that the transient nature of STRA reduced the sense of social cohesion. As one policymaker stated:

The community don't like that there are these people they don't know coming into their community and chipping away at what the permanent residents feel is their community. Yet some of the short-term rental people want to move into a house because they want the comfort of being in a community.

2.2.9 Community benefits of STRA

Some industry representatives argued that the discourse surrounding STRA focuses on challenges and ignores benefits of STRA for local communities. One participant highlighted the importance of the flexible income that STRA can provide for people with caring responsibilities:

There are a lot of people, particularly women, in the situation where they are caring for children or elderly relatives and they find it difficult to work a full-time job, so [STRA] is something that offers them flexibility. You can work within school hours, you can work weekends—it's just incredibly flexible.

STRA industry representatives also argued that STRA provides an income and purpose for asset-rich, income-poor older women. Additionally, the work generated by STRA properties, such as cleaning, can provide a flexible income for older women and women who are at risk of poverty. A STRA advocate argued that STRA is important because *‘in regional areas, there's not a lot of work for older women, in the traditional sense’*.

STRA industry representatives outlined the variety of ways that STRA landlords interact with local communities, including:

- collaborations with local businesses to provide products such as food, drinks or soaps for guests
- promoting local services, such as disability services
- partnering with businesses, such as beauty therapists and marriage celebrants.

Industry representatives also emphasised the importance of STRA in providing emergency accommodation. Individual STRA landlords offer their properties at no cost during crises, such as floods and bushfires. The STRA sector also rents accommodation to:

- people fleeing family violence
- insurance companies providing accommodation when houses are damaged
- families and staff who need to be near medical facilities for the short- to medium-term.

STRA properties also enable people to keep their pets with them during crises.

Some policy makers noted that their localities have adapted to current levels of STRA, so introducing policies to reduce STRA numbers would have a negative impact on communities and businesses.

2.2.10 Current regulations

Planning is one avenue for managing the impacts of STRA. Most LGAs in this study were under planning schemes that allow properties to transition freely between short-term and long-term rental markets. Other LGAs required specific planning approvals for STRA. One LGA had implemented a local law to prohibit STRA in low-density residential zones. However, properties already participating in STRA were allowed to continue under existing-use rights.

Some LGAs were actively considering similar restrictions for their jurisdictions. Several participants wanted planning provisions to ensure that, when new land is opened for development, the new properties are designated for long-term residences, particularly for affordable housing. As one participant explained: *'We hardly have any land left ... We need it to be developed for permanent housing, small dwellings, no more short-term.'*

The state government and most of the LGAs represented in these interviews had introduced some form of registration requirement for STRA. Registration can be used to:

- monitor STRA numbers
- manage amenity issues
- check compliance with safety or other regulations
- discourage STRA via registration fees.

Several of the LGAs that introduced registration also required each STRA property to have a contact person available to respond to complaints within a set time—for example, under two hours.

Registration enables councils to charge registration fees, which were either:

- set low to encourage registration, or
- set high to make STRA less financially appealing.

One council also charged higher rates for STRA properties than other properties. Some councils were also investigating nightly caps for the volume of STRA allowed in their LGAs. Our participant interviews took place in mid-2024, which is after the Victorian Government announced the STRA levy but before its implementation in 2025. At the time, LGAs in Victoria were waiting to see how the levy would interact with their local policies.

One council did not have any registration requirements, as it had a lower density of STRA than the other LGAs in this study. Its priority was primarily on managing the amenity issues associated with STRA, with a focus on properties that generate complaints. The policymaker of this LGA described the council's approach thus: *'We only go after the mischief makers and let the rest of the industry do its thing.'* This LGA primarily contains STRA properties in apartment buildings. The council offers guidance to the community on managing STRA issues through owners' corporations, and will only intervene after complainants have tried to resolve the issue through their owners' corporation. Their preferred regulation to assist councils in managing STRA was that the platforms should be required to provide a contact person for each region who can be contacted when issues arise:

What would be great would be an area contact at each of the platforms so that when there's an issue, councils have someone to talk to. It could also be better for the platforms, because they're currently dealing directly with resident complainants and often removing the properties, banning them.

2.2.11 Voluntary programs

In addition to STRA regulations, voluntary programs are also used to encourage owners to withdraw from STRA. Three LGAs had used mailouts asking STRA landlords to transition properties into the long-term market because of the housing crisis. While it is difficult to quantify precise impacts, as properties frequently transition between the two markets, there were indications in two LGAs that the mailout had some effect. The third LGA reported little to no effect. The state government policy maker pointed to the success of Western Australia's STRA incentive scheme, which offered a one-off payment of \$10,000 to transition a STRA property into the long-term rental market (Department of Planning, Lands and Heritage 2024).

2.2.12 Local government perspectives on STRA regulation

When asked what STRA policies would be appropriate at the state or federal government level, local government participants pointed out the difficulty of enacting regulations because the density and challenges of STRA vary among LGAs—and even within them. Some participants felt that this diversity meant that local government is best placed to manage STRA. Others wanted support from state or federal governments, with the power for local governments to enact the regulations that best suit the needs of their communities. As one local government policy maker stated:

Rather than have a blanket, one-size-fits-all approach, we would like a local, nuanced approach. For example, in some areas [within the LGA] there are no problems, we don't want to restrict STRA; whereas in new residential developments, we want to keep it for residents ... What we would like to see at the state level is a suite of up-to-date options that can be adapted for a local approach.

Some participants felt hobbled by state planning legislation. For example, existing-use provisions that limit the ability of councils to restrict STRA, or 'clunky' Civil and Administrative Tribunal processes for dealing with owners of properties that repeatedly cause problems to the community.

Several respondents said that they would like to see a mechanism to capture some revenue from STRA. LGAs that collected money from STRA properties used that income to fund STRA-specific activities, such as responding to noise complaints. Several participants also suggested reinvesting that revenue to create affordable housing.

Local government participants also said that it would be useful to have local STRA data, and pointed out that governments in overseas jurisdictions have required STRA platforms to provide data to local authorities.

The state government policy maker believed that state governments can support local governments by enacting light-touch legislation. For instance, STRA registration designed to maximise transparency can provide local governments with accurate data on STRA in their region. Registration requirements—such as those in New South Wales and Western Australia—can provide an enforcement mechanism for local laws and statewide requirements such as smoke alarms or pool fencing, provided the registration data are made readily available to councils.

2.2.13 Industry perspectives on STRA regulation

All industry representatives interviewed expressed support for regulation—especially registration requirements. Some representatives noted that the variation in regulation around Australia increases the difficulty for STRA operators, as there are different rules for STRA in each state and territory, and many LGAs have additional rules. A STRA industry representative gave the following example:

Brisbane City Council has very clearly defined laws with respect to STRA. The Gold Coast is different, the Sunshine Coast is different, and in Moreton Bay it's different again. They are all the LGAs surrounding Brisbane, and they're only half an hour apart from each other. But they're all different.

Industry representatives also noted that some LGAs, such as Mandurah in Western Australia, welcome increased numbers of STRA because STRA supports local tourism industries (City of Mandurah, n.d.).

2.3 Policy development implications

2.3.1 Policy concerns

The STRA sector is moving fast, and has been changing constantly since the advent of Airbnb and other online property-hosting platforms. While offline short-term tourist accommodations have been around for a long time, Airbnb only launched in 2008 and may not yet have reached peak market penetration in many parts of Australia. Consequently, existing knowledge is scant about how STRA has been transforming and where its trajectory will lead.

Thus there is significant uncertainty about what STRA is, where it is going, and what impacts might arise as a result of STRA markets in local municipalities and communities. This project sought to address this uncertainty by conducting interviews with representatives from government and non-government agencies in a range of Australian jurisdictions.

However, interview participants gave a wide range of responses to our questions, to the extent that there was no real consensus on any of the key issues raised in the existing academic literature. Some respondents:

- believed the STRA sector is expanding, while others believed it is contracting
- believed STRA is producing negative consequences for housing affordability, while others believe there is no effect
- claimed that STRA was positively contributing to tourism in their area, while others believed that STRA has contributed to 'overtourism'.

Predictably, there was also no consensus from government interview respondents over whether (or how) STRA ought to be regulated.

Despite these inconsistencies, there were five common themes that arose during the interviews:

1. Without registration requirements, government organisations lack the data to track STRA activity effectively.
2. Data from Airbnb and other online STRA hosting platforms can be incomplete or inaccurate. This applies to both data obtained directly from the organisation itself or scraped from the website through third-party software. This is due to:
 - the presence of multiple listings for the same property
 - professional property managers who list properties on behalf of silent owners
 - different listing types for single properties.
3. Many LGAs lack the capacity to regulate STRA on their own—and enforce those regulations—and are insufficiently supported by existing state-based settings.
4. There has been an increase in professionalisation of STRA hosting in recent years. This should make regulation easier—as it is easier to regulate corporate entities than it is to regulate private citizens. But professionalisation has occurred alongside greater numbers of non-hosted properties on the market, and hence more negative impacts for local communities.
5. The needs of different communities can vary widely. There will not be a one-size-fits-all intervention that will suit all areas.

These points can all be drawn together. There is a distinct lack of information around STRA, and governments need information to produce effective policy. At the same time, the local governments confronted with STRA activity lack the capacity to intervene without support. Effective policy options would therefore require:

- better data
- better capacity to regulate.

2.3.2 Policy implications

The simplest way to address these problems is with a registry of STRA properties

Such a registry would provide state governments, LGAs and other government organisations—such as the Australian Bureau of Statistics (ABS)—with vital information about STRA properties, including:

- where they are
- what kind of accommodation they provide
- how much the market is worth.

A registry would also allow public-sector authorities to track growth in the industry with geographic detail.

A STRA registry would need to be operated at the state or territory level

LGAs do not have the capacity to run registration programs or enforce compliance. In addition, the close proximity of different councils in larger tourist regions would necessitate coordination across LGAs in a way that the LGAs themselves might not be able to accomplish. For example, Bass Coast and Mornington Peninsula in Victoria; or Central Coast and Lake Macquarie in New South Wales. However, a national registry would likely prove to be too broad—especially since laws governing rental accommodation, land-use planning, and municipalities vary among states and territories. Two states have already introduced STRA registries: New South Wales and Western Australia.

A state/territory STRA registry, and compliance with registration, could be funded by a registration fee

State and territory governments already run numerous programs involving registration and licensing. They have considerable capacity and institutional experience in operating registration schemes—for example, game licences.

A STRA registry would address information-gap problems in the STRA sector, and would support and enable the development of future policy options

A STRA registry would provide governments with information about:

- whether the sector is expanding or contracting (and where this is happening)
- whether or not STRA properties are crowding out long-term rental accommodations, potentially including information on the previous use of the property
- how the location of STRA properties might be linked to crime, noise, traffic or pollution
- how STRA might be supporting the tourism industry (or negatively impacting it).

The information provided by a STRA registry would support policy makers in deciding how to intervene in the STRA sector. More importantly, this information would enable context-specific interventions tailored to the needs of local communities.

3. Who and where are STRA landlords in Australia?

- **Airbnb data from 2019 and 2023 show shifts in Australia’s STRA sector from before the Covid-19 pandemic. Among the findings:**
 - **there were declines in overall STRA listings, hosted listings and the number of STRA landlords**
 - **non-hosted STRA now outnumber hosted STRA**
 - **listings for larger properties increased, along with guest capacity per listing**
 - **STRA grew in regional tourist destinations, but declined in many capital cities.**
- **The results point to consolidation and professionalisation in the STRA sector, which indicates that a more centralised, planned approach by state governments may be needed.**

3.1 What we already know about STRA listings in Australia

Estimating the extent and impact of STRA lettings has become a significant concern among both the general public and government actors in Australia, as in many other countries. Concerns surrounding the surge in STRA primarily revolve around three key issues:

- housing unaffordability and unavailability for long-term residents
- social repercussions stemming from an influx (and dispersal) of tourists
- commercial implications for small-scale providers of traditional tourist accommodation.

The advent of platforms such as Airbnb has seen the STRA market grow rapidly over the past two decades. This has prompted extensive research into the effects of the industry on the housing market, communities and hospitality businesses—particularly in areas with high concentrations of STRA.

While much has been written about the growth of the STRA market, there is less information available about changes in the character of STRA over time, such as the prevalence of hosted and non-hosted STRA, the business models of STRA providers, and changes to STRA volumes as a result of the Covid-19 pandemic.

While the Covid-19 pandemic caused a downturn in STRA, longer stays in outer suburbs grew in popularity as people used STRA to adapt to lockdowns and remote work (Li, Han et al. 2023). STRA rebounded quickly once borders reopened (Urbis 2024).

STRA has been positioned as part of the 'sharing economy', and individuals who rent out STRA properties are referred to as 'hosts' rather than landlords—even if they engage in non-hosted STRA (Ritchie and Grigg 2019). A global trend in STRA has been its professionalisation, with a rise in non-hosted STRA and an increase in people renting out multiple properties (Simcock 2023; Wachsmuth and Weisler 2018). In 2018, almost a third (29%) of STRA properties in Sydney and nearly half (45%) in Melbourne were non-hosted whole homes listed full-time on the STRA market (Crommelin, Troy et al. 2018). The growth of non-hosted STRA is a particular concern for policy makers, as each non-hosted STRA listing removes an entire home from the long-term housing market.

An extreme example of this professionalisation is the emergence of 'mega-hosts', who own large numbers of STRA properties. While the exact proportion of properties held by mega-hosts is unclear, it is evident that they exist in the STRA market in many parts of Australia (Ibrahim, Lloyd-Cape et al. 2023).

Geographically, the distribution and effects of STRA vary significantly. STRA are generally found clustered around urban centres, tourist and transportation hubs, and amenities such as restaurants (Adamiak 2022; Ioannides, Röslmaier et al. 2018). Thus the impacts of STRA on housing affordability are more pronounced in these areas (Garcia-López, Jofre-Monseny et al. 2020).

The effects of STRA on communities vary according to location. In areas with existing tourist infrastructure, STRA can diversify tourism offerings without negative effects. However, areas that historically lacked tourism commonly have more conflicts between tourists and residents when faced with high STRA density (Gurran, Zhang et al. 2020).

In this chapter we update the evidence on the extent of STRA listings in Australia, and compare STRA markets pre- and post-Covid-19. We complement this with an analysis of change in spatial density of non-hosted STRA in major capital cities and leading tourism locations over time.

3.2 Number of Airbnb listings in 2019 and 2023

The following sections compare snapshots of Airbnb listings from January 2019 (before Covid-19 lockdowns) and January 2023 (after Covid-19 lockdowns).

3.2.1 Number of listings and landlords

Table 4 shows summary characteristics for the Airbnb listings and landlords/hosts¹ during the two data-collection periods, and changes in these characteristics over time. It shows a decrease of over 9,000 listings overall, and a reduction of nearly 20,000 in the number of landlords, which suggests consolidation of STRA properties among the remaining landlords.

The very high number of maximum properties per landlord in both 2019 and 2023 suggests an increase in the number of properties listed by management companies, rather than individual landlords.

¹ Airbnb uses the term 'hosts'. However, in keeping with the rest of this report, we use the term 'landlords'.

Table 4: Number of listings and landlords, full datasets

	2019	2023	Change
Number of listings	159,739	150,649	-9,090 (-5.69%)
Number of (unique) landlords	102,178	82,704	-19,474 (-19.06%)
Mean number of listings per landlord	1.56	1.82	+0.26 (+0.17%)
Median number of listings per landlord	1	1	No change
Maximum number of listings per landlord	432	907	+475

Source: Data from Inside Airbnb.

Note: Data-collection dates: 28–30 January 2019 and 16–30 January 2023.

Airbnb listings include not only residential properties but also traditional holiday accommodations such as caravans, bed and breakfasts, and hotels. Table 5 separates these non-residential listings from traditional homes, such as houses and apartments in our dataset (see Appendix 2 and Appendix 3 for details). However, we note that non-typical options such as caravans are increasingly used for housing in the current housing crisis (Pawson, Parsell et al. 2024).

Table 5 shows that residential listings fell by nearly 15,000 in the period 2019–2023, while non-residential listings grew by almost 6,000, making up over a fifth of all listings by 2023. This suggests a broadening of Airbnb uses.

Table 5: Residential and other listings over time

	2019	2023	Change
Residential	134,415 (84.15%)	119,693 (79.45%)	-14,722
Other	25,324 (15.85%)	30,956 (20.55%)	+5,632

Source: Data from Inside Airbnb.

Tables 6–16 include only residential properties. Table 6 repeats the data from Table 4, restricted to residential listings only. It shows an even greater change in the number of listings over the period for residential listings than for overall listings (-10.95% compared to -5.69%). The change in the number of landlords is also greater for residential properties, increasing the mean number of listings per landlord to 1.8. These findings reiterate the practitioner-interview finding that STRA has consolidated and professionalised.

Table 6: Number of listings and landlords, residential properties

	2019	2023	Change
Number of listings	134,415	119,693	-14,722 (-10.95%)
Number of (unique) landlords	88,270	66,540	-21,730 (-24.62%)
Mean number of listings per landlord	1.52	1.80	+0.28 (+18%)
Median number of listings per landlord	1	1	No change
Maximum number of listings per landlord	388	903	+515

Source: Data from Inside Airbnb.

Table 7 shows the number of STRA properties per landlord. The proportion of landlords listing a single property has remained fairly consistent, at around 83% of all landlords.

There have been small increases in the proportion of landlords listing eight or more properties, with the biggest increase in landlords (or management companies) listing 11 or more properties. The masking of the number of properties owned by landlords who use management companies to list their properties is a limitation of the data.

Table 7: Number of residential listings per landlord

Number of properties	2019		2023		Change in n over time	Change in proportion over time
	n	%	n	%	n	%
1	73,609	83.39	55,333	83.16	-18,276	-24.83
2	9,120	10.33	6,454	9.70	-2,666	-29.23
3	2,536	2.87	1,881	2.83	-655	-25.83
4	998	1.13	770	1.16	-228	-22.85
5	515	0.58	429	0.64	-86	-16.70
6	299	0.34	278	0.42	-21	-7.02
7	194	0.22	179	0.27	-15	-7.73
8	125	0.14	137	0.21	12	9.60
9	99	0.11	111	0.17	12	12.12
10	78	0.09	83	0.12	5	6.41
11+	697	0.79	885	1.33	188	26.97

Source: Data from Inside Airbnb.

3.2.2 Volume of non-hosted Airbnb listings

We have used the definition of non-hosted as whole-home, residential listings that are available on the STRA market for at least 90 days of the year. This differentiates full-time STRA from properties that are placed onto STRA when residents go on holidays, or properties where a spare bed in a principal place of residence is listed as STRA.

Table 8 presents the changes in hosted and non-hosted residential property listings between 2019 and 2023. Over this period, hosted listings declined significantly, with nearly 24,000 fewer listings in 2023 compared to 2019. In contrast, non-hosted listings increased by almost 9,000. By 2023, non-hosted properties made up the majority (58%) of STRA listings.

Table 8: Percentage of residential property listings that are hosted versus non-hosted, 2019 and 2023

	2019		2023		Change over time	
	<i>n</i>	%	<i>n</i>	%	<i>n</i>	%
Hosted	73,710	54.84%	50,166	41.91%	-23,544	-31.94
Non-hosted	60,705	45.16%	69,527	58.09%	+8,822	+14.53
Total	134,415	100.00%	119,693	100.00%	-	-

Source: Data from Inside Airbnb.

Non-hosted residential listings: property type and size

To further investigate the nature of STRA properties in Australia and how they have changed over time, we now examine property types and sizes. Table 9 shows property types. Unfortunately, the way that Airbnb collected this information from landlords changed between the two data points, frustrating the ability to compare change over time. In 2019, houses and apartments were classified separately; in 2023, houses and apartments were combined into a single category, 'Entire home/place/rental unit.' This reclassification accounts for the gaps in Table 9.

Table 9: Non-hosted residential listings, by property types over time

Property type	2019		2023	
	<i>n</i>	%	<i>n</i>	%
House	28,968	47.72		
Bungalow	958	1.58	541	0.78
Condo	1,190	1.96	1,509	2.17
Cottage	3,102	5.11	4,366	6.28
Apartment	23,891	39.36		
Townhouse	2,596	4.28	2,574	3.70
Entire home/place/rental unit			60,537	87.07

Source: Data from Inside Airbnb.

Table 10 and Table 11 show two indicators of property size: number of bedrooms and number of people accommodated. Looking at these indicators helps us to explore the types of properties being taken out of the long-term market. This will allow us to test the argument that many STRA properties are large and too high-cost to provide affordable housing in the long-term market.

Table 10 shows a drop in the number of smaller (studios, one-bedroom) properties offered. However, listings of residential properties with three or more bedrooms grew. This suggests that non-hosted STRA landlords are shifting away from apartments and smaller townhouses—and instead favouring entire detached houses.

Table 10: Number of non-hosted residential listing, by number of bedrooms

Number of bedrooms	2019		2023		Change over time	
	<i>n</i>	% of listings	<i>n</i>	% of listings	<i>n</i>	%
0	2,036	3.35	0	0	-2036	-100*
1	10,319	17.00	10,277	15.07	-42	-0.41
2	18,080	29.79	19,445	28.52	+1,365	+7.55
3	17,243	28.41	21,404	31.39	+4,161	+24.13
4	9,403	15.49	12,248	17.96	+2,845	+30.26
5	2,631	4.33	3,521	5.16	+890	+33.83
6	655	1.08	841	1.23	+186	+28.40
7	189	0.31	255	0.37	+66	+34.92
8	70	0.12	106	0.16	+36	+51.43
9	27	0.04	36	0.05	+9	+33.33
10+	46	0.08	59	0.09	+13	+28.26

Source: Data from Inside Airbnb

*Note: 0 beds = studio; this appears to be another Airbnb data-collection change between 2019 and 2023.

Table 11 shows a marked upward trend in the number of listings accommodating larger groups, particularly those offering space for six, eight, nine, or even 10 guests. Notably, this increase is greater than the increased number of bedrooms available. The relatively modest increase in listings accommodating five or seven guests is likely because double and queen beds typically sleep two people, making odd-number capacities less common.

Table 11: Non-hosted residential listings, by number of people accommodated

Number accommodated	2019		2023		Change over time	
	<i>n</i>	%	<i>n</i>	%	<i>n</i>	%
1	79	0.13	77	0.11	-2	-2.53
2	7,494	12.34	8,154	11.73	660	-8.81
3	2,223	3.66	1,808	2.60	-415	-18.67
4	13,136	21.64	14,715	21.16	1,579	+12.02
5	4,447	7.33	4,713	6.78	266	+5.98
6	12,952	21.34	15,491	22.28	2,539	+19.6
7	3,029	4.99	3,295	4.74	266	+8.78
8	8,066	13.29	10,250	14.74	2,184	+27.08
9	1,772	2.92	2,083	3.00	311	+17.55
10+	7,507	12.37	8,941	12.86	1,434	+19.1

Source: Data from Inside Airbnb.

Non-hosted residential listings: location

Airbnb necessarily includes data on location in its listings. This allows us to investigate how STRA properties are distributed across Australia, as well as how this has changed over time.

Table 12 shows that STRA properties are heavily concentrated in Victoria and New South Wales, which accounted for over 64% and 61% of listings in Australia in 2019 and 2023 respectively. However, over the period of study New South Wales saw only a small increase in the number of STRA properties, perhaps due to the introduction of legislation limiting the number of nights a property can be listed as a STRA in some areas (Department of Planning 2024).

In contrast, the Northern Territory has a small number of properties, but that number more than doubled between 2019 and 2023. The ACT and Queensland also experienced substantial growth. Western Australia was the only jurisdiction where the number of STRA properties decreased.

Table 12: Non-hosted residential listings, by state/territory

Jurisdiction	2019		2023		Change over time	
	<i>n</i>	%	<i>n</i>	%	<i>n</i>	%
ACT	323	0.53	604	0.87	+281	+87.00
NSW	22,993	37.88	23,625	33.98	+632	+2.75
NT	292	0.48	626	0.90	+334	+114.38
QLD	8,693	14.32	13,918	20.02	+5,225	+60.11
SA	3,372	5.55	4,200	6.04	+828	+24.56
TAS	2,505	4.13	2,610	3.75	+105	+4.19
VIC	16,215	26.71	19,065	27.42	+2,850	+17.58
WA	5,438	8.96	4,868	7.00	-570	-10.48
Other ²	0	0	11	0.02	-	
Missing	874	1.44	0	0	-	-

Source: Data from Inside Airbnb.

To contextualise STRA numbers within the broader housing market, the data in Table 13 compare the number of non-hosted STRA listings to the total number of properties in each state and territory, which provides an estimate of the proportion of dwellings used for full-time STRA. While this is only an approximation, it offers valuable perspective—especially as there are substantial differences in population and housing stock across jurisdictions. Adjusted for these differences, Tasmania has the highest concentration of STRA properties, at approximately 1% of all dwellings in both 2019 and 2023.

Despite an increase in the absolute number of STRA properties in New South Wales between 2019 and 2023, the proportion of dwellings used for STRA declined slightly—which suggests that the growth in housing stock outpaced the growth in STRA listings. Western Australia was the only other state or territory to record a decline in the proportion of dwellings used for STRA over the period 2019–2023. It is important to note that these state- and territory-level figures mask considerable variation within jurisdictions (Sainaghi 2020), which is explored in more detail below.

² Includes Christmas Island and Jervis Bay.

Table 13: Non-hosted residential listings by state/territory, compared to number of dwellings overall

Jurisdiction	2019			2023			Percentage point change 2019–2023
	No. STRA properties 2019	No. dwellings, 2019	STRA properties as % of dwellings, 2019	No. STRA properties 2023	No. dwellings, 2022	STRA properties as % of dwellings, 2022/23	
ACT	323	175,770	0.18	604	190,935	0.32	+0.14
NSW	22,993	3,222,083	0.71	23,625	3,373,885	0.70	–0.01
NT	292	86,093	0.34	626	87,651	0.71	+0.37
QLD	8,693	2,082,503	0.42	13,918	2,181,124	0.64	+0.22
SA	3,372	783,860	0.43	4,200	808,359	0.52	+0.09
TAS	2,505	249,497	1.00	2,610	259,421	1.01	+0.01
VIC	16,215	2,658,258	0.61	19,065	2,839,329	0.67	+0.06
WA	5,438	1,100,236	0.49	4,868	1,138,645	0.43	–0.06

Source: STRA data from Inside Airbnb, dwelling numbers from the ABS for March 2019 and June 2022, the closest available to STRA data-collection dates (ABS 2022).

Table 14 and Table 15 show the number of properties per landlord for each state and territory. Landlords listing a single non-hosted STRA property are the clear majority in each state, although the extent varies. The ACT, and to a lesser extent Tasmania, have shifted towards landlords listing multiple properties. All states show an increase in landlords (or management companies) listing 11 or more properties on Airbnb.

Table 14: Number of non-hosted residential listings per landlord by jurisdiction, percentage of listings in state/territory (Part 1)

Number of properties	ACT		VIC		NSW		QLD	
	2019	2023	2019	2023	2019	2023	2019	2023
1	76.28	75.29	81.04	82.35	81.75	82.94	77.89	78.35
2	15.81	11.03	10.97	9.89	10.73	9.59	10.99	10.05
3	2.79	5.70	3.17	3.00	2.77	2.79	4.09	3.92
4	2.33	4.18	1.15	1.10	1.29	1.09	1.88	1.63
5	0.93	1.52	0.58	0.65	0.77	0.68	1.46	1.20
6	0.47	0.38	0.47	0.43	0.50	0.29	0.65	0.84
7	0.00	0.38	0.37	0.26	0.32	0.28	0.39	0.50
8	0.00	0.00	0.21	0.15	0.21	0.17	0.33	0.34
9	0.47	0.00	0.20	0.19	0.12	0.11	0.23	0.38
10	0.00	0.00	0.10	0.08	0.14	0.14	0.26	0.23
11+	0.93	1.52	1.75	1.89	1.41	1.92	1.84	2.56

Source: Data from Inside Airbnb.

Table 15: Number of non-hosted residential listings per host by jurisdiction, percentage of listings in state/territory (Part 2)

Number of properties	NT		WA		SA		TAS	
	2019	2023	2019	2023	2019	2023	2019	2023
1	71.91	76.92	80.81	81.50	82.05	82.20	80.02	78.41
2	17.42	13.55	10.79	9.31	10.11	9.80	11.88	12.16
3	5.62	3.30	3.11	3.39	3.34	3.21	4.14	4.29
4	1.12	2.20	1.41	1.09	1.72	1.33	1.77	1.43
5	1.12	0.00	0.98	0.58	0.51	0.75	0.65	0.91
6	0.56	0.00	0.55	0.66	0.46	0.63	0.35	0.39
7	0.00	0.73	0.28	0.43	0.19	0.21	0.12	0.65
8	1.12	0.00	0.18	0.35	0.19	0.29	0.24	0.20
9	0.56	0.00	0.12	0.31	0.14	0.04	0.12	0.33
10	0.00	0.73	0.22	0.19	0.05	0.00	0.12	0.33
11+	0.56	2.56	1.54	2.18	1.25	1.54	0.59	0.91

Source: Data from Inside Airbnb.

In the next section we use GIS mapping to further explore geographic variation in STRA.

3.3 Spatial analysis of Airbnb listings, 2019 and 2023

To understand where and how the geographic distribution of STRA has changed over time, a finer scale analysis was conducted for 13 LGAs: five metropolitan and eight regional. The LGAs were:

- South Australia: Adelaide, The Barossa, Robe and Victor Harbor
- Victoria: Melbourne, Bass Coast and Mornington Peninsula
- New South Wales: Sydney and Byron
- Queensland: Brisbane, Noosa and Whitsunday
- Tasmania: Hobart.

These LGAs were selected to show the variations in STRA between capital cities and popular tourism destinations since the onset of Covid-19. Table 16 shows the counts and percentage change in STRA in the selected LGAs from 2019 to 2023.

Of the 13 LGAs analysed, non-hosted STRA increased most from 2019 to 2023 in regional LGAs and Mornington Peninsula, which is classified as metropolitan but is considered peri-regional. STRA grew by more than 27% in the following LGAs:

- Bass Coast 29.7%
- Whitsunday 29%
- Mornington Peninsula 28.2%
- The Barossa 27.55%
- Victor Harbor 27.2%.

In contrast, the capital city LGAs had significantly lower growth—or even declines—over this time. The largest percentage decline was in Sydney (–48.3%), followed by Melbourne (–23.8%), Brisbane (–8.7%) and Hobart (–8.2%). Capital cities with positive growth—such as Adelaide—were overshadowed by their regional counterparts. It is likely that capital-city declines are follow-on effects of the Covid-19 pandemic, which saw many inner-city STRA moved to the private rental market, while outer suburbs and regional towns experienced an increased demand for STRA for domestic tourism (Chen, Cheng et al. 2022; Li, Han et al. 2023). However, despite Byron being a sought-after travel destination, it only experienced moderate growth in STRA listings between 2019 and 2023—which is possibly an indication of saturation in that market.

Table 16: Non-hosted residential listings, by LGA

State	Metro/regional	LGA	2019	2023	Change over time	
					<i>n</i>	%
NSW	Regional	Byron	1,176	1,252	+76	6.46
NSW	Metro	Sydney	2,078	1,074	–1,004	–48.32
QLD	Regional	Whitsunday	510	658	+148	29.02
QLD	Regional	Noosa	1,209	1,409	+200	16.54
QLD	Metro	Brisbane	1,466	1,339	–127	–8.66
SA	Regional	The Barossa	98	125	+27	27.55
SA	Regional	Victor Harbor	140	178	+38	27.14
SA	Regional	Robe	147	182	+35	23.81
SA	Metro	Adelaide	342	370	+28	8.19
TAS	Metro	Hobart	527	484	–43	–8.16
VIC	Regional	Bass Coast	1,113	1,443	+330	29.65
VIC	Metro	Mornington Peninsula	2,561	3,282	+721	28.15
VIC	Metro	Melbourne	2,600	1,981	–619	–23.81
Total:			11,889	12,703	+814	6.85

Source: Data from Inside Airbnb.

3.3.1 STRA densities

To analyse changes in the spatial patterning and distribution of STRA from the pre-Covid base of 2019 to 2023, the density of properties was mapped within each LGA (see Appendices 4–8). The regional LGAs with the highest percentage increase of non-hosted STRA—The Barossa (Figure A4), Victor Harbor (Figure A5), Mornington Peninsula (Figure A8), Bass Coast (Figure A9), Noosa (Figure A12) and Whitsunday (Figure A14)—had relatively consistent distribution of properties between 2019 and 2023. Growth was primarily in areas that were already densely populated with STRA.

Similarly, no significant spatial dispersion was observed in Robe (Figure A6) or Byron Bay (Figure A11), where increases in STRA listings remained concentrated within the main townships. This pattern is partly influenced by the larger geographic boundaries of some regional LGAs, but also reflects the tendency for STRA properties to cluster near tourist attractions, transport hubs and existing hotel infrastructure (Adamiak 2022; Guttentag 2019).

Changes in the distribution of STRA density were most evident in the capital city LGAs. STRA decreased in all of the capital city LGAs between 2019 and 2023—with the exception of Adelaide. While the dispersion of density was mostly consistent, existing STRA hotspots intensified in city centres and near popular tourism districts and transport hubs. This was particularly evident in:

- Southbank and Southern Cross station precincts in Melbourne (see Figure A7)
- Potts Point and Darlinghurst in inner Sydney (see Figure A10)
- South Bank precinct of Brisbane (see Figure A13)
- Battery Point in Hobart (see Figure A15).

In contrast, although Adelaide (Figure A3) saw a slight increase in STRA, the dispersion of properties changed considerably in 2023, and is now largely concentrated in the inner-city's northeast.

3.4 Policy development implications

3.4.1 Policy concerns

In the absence of a comprehensive mandatory registration scheme for STRA properties and landlords, the best source of data on STRA listings continues to be information scraped from online STRA hosting platforms.

The data used here, obtained from Airbnb, is necessarily incomplete, as there are other online platforms—such as Stayz. However, Airbnb has by far the largest market share of STRA listings.

We compared data on STRA listed on Airbnb in Australia in January 2019 and January 2023, representing points before and after the Covid-19 pandemic. Our analysis revealed the following.

- The total number of listings dropped 11% between 2019 and 2023—but the number of non-hosted listings grew by 15%.
- Non-residential listings—such as caravans, yurts, 'glamping', and other holiday-only accommodation—rose 22%, while residential properties dropped 11%.
- The number of unique landlords for residential properties dropped 25%.
- The median number of listings per individual landlord for residential properties remained constant at one, but the highest number of residential listings for a single landlord rose from 388 to 903. These very high numbers likely indicate listing by third-party property managers.
- In 2019, the majority of residential listings were for hosted properties (55% hosted versus 45% non-hosted), but by 2023 this relationship had reversed (42% hosted versus 58% non-hosted).
- Listings offering to accommodate greater numbers of guests were on the rise.
- Metro areas had only moderate gains or declines in non-hosted residential listings. Regional tourist destinations had significant growth in the number of non-hosted residential listings.

These results indicate three important policy-relevant trends in the STRA sector:

- The STRA industry appears to be undergoing professionalisation.
- Non-hosted properties now dominate the STRA landscape.
- STRA is expanding in regional tourist hotspots but declining in major urban centres.

The STRA industry appears to be undergoing professionalisation

There is a growing share of listings managed by multi-property owners and professional managers. This is reflected in a 25% drop in unique landlords despite a decline of only 11% in total listings, indicating consolidation. The largest single entity now manages nearly 1,000 listings. At the same time, hosted residential listings have declined while dedicated holiday properties have increased. This marks a shift away from Airbnb's original 'sharing economy' model toward a more commercialised sector.

Non-hosted properties now dominate the STRA landscape

Previously, STRA provided a way for individuals to occasionally rent out all or part of their home. Now, dedicated non-hosted properties are let out to tourists all year round. Before the pandemic, hosted listings outnumbered non-hosted listings, but by 2023 that trend had reversed. Listings also now cater to larger groups, which suggests that landlords are actively maximising revenue potential.

STRA is expanding in regional tourist hotspots while declining in major urban centres

Between 2019 and 2023, non-hosted STRA listings fell in Sydney, Melbourne and Brisbane, but rose in regional destinations such as Bass Coast. This shift suggests that STRA yields higher returns in regional areas, where long-term rental demand is lower and tourism is strong.

3.4.2 Policy implications

Professionalisation, consolidation and industry maturation all suggest that governments might need to alter their approach to the STRA sector. Rather than an informal market of families and individual part-time investors, STRA is developing into a professional industry as:

- STRA properties are let out on a full-time basis year round
- successful market strategies are evident and are widely pursued
- trends in STRA follow property market forces that drive investors to higher-yield properties and locations.

Governments that wish to interact with the STRA sector should develop a regulatory framework that enables effective government–industry cooperation. For example, New South Wales has a STRA framework for planning and fire safety. Other states could adopt similar frameworks to ensure consistency across regional and metropolitan markets. Regulatory frameworks could be expanded to include the:

- rights and obligations of STRA landlords and tenants
- explicit ability for government to establish rules on where STRA properties can be let, and how long they can be let for.

By recognising STRA as a mature industry that is now comparable to the long-term rental and residential property development sectors, governments can create a regulatory framework that enables them to address longer-term planning and policy challenges if needed.

4. Perspectives of STRA landlords

- **Property owners perceive STRA to be more work and more risk than long-term rental—but with greater return on investment.**
- **We identified three distinct groups of STRA landlords, based on shared perspectives.**
 - **Many STRA landlords are motivated by profit, but this is not the only reason individuals choose to become STRA landlords.**
 - **Some STRA landlords are motivated by social factors that provide them with a sense of enjoyment or satisfaction in helping others.**
 - **Some perspectives were shared across the groups, notably a belief that STRA has become more professional over time.**
- **The variation in motivations among STRA landlords suggests that there will be different responses to regulatory action. Effective regulation of STRA may require multiple policy levers being applied at the same time.**

4.1 What we already know about landlords' perspectives

While most studies of STRA stakeholders' motivations and experiences have focussed on guests' experiences or the business-marketing decisions of landlords, a small number of studies have examined STRA landlords' motivations and experiences (Dann, Teubner et al. 2019; Guttentag 2019).

Financial perspectives

The most commonly cited motivators for participating in STRA are financial (Guttentag 2019). A common motivator to let properties as STRA rather than the long-term rental market is that STRA brings in a higher income (Crommelin, Troy et al. 2018). STRA hosts follow different financial pathways into STRA. For example, some hosts enter the market due to a financial shock such as a redundancy, while others use STRA to top up their ongoing income (Semi and Tonetta 2021). The income from STRA is used for different purposes, including covering essential living expenses or maintaining the investment property (Crommelin, Troy et al. 2018). STRA can also enable people to purchase a second home in a desirable tourist location that would otherwise be too expensive (Karlsson and Dolnicar 2016).

STRA also has financial disadvantages, such as peaks and troughs in income (Crommelin, Troy et al. 2018). Since the advent of online platforms, STRA has become mainstream—and the increased competition as more houses are listed on local STRA markets has led to declines in some landlords' profits (Crommelin, Troy et al. 2018).

Social perspectives

After financial motivators, social considerations are the next most prevalent motivators for letting a property as STRA (Karlsson and Dolnicar 2016). Some motivations, such as having company in the home, apply solely to hosted STRA. Non-hosted STRA landlords have limited opportunities for social interaction with their guests (Schor and Attwood-Charles 2017).

However, non-hosted landlords do report social motivations for STRA (Dann, Teubner et al. 2019). These include meeting people from different places, giving others the opportunities that hosts had while travelling, making people happy, and sharing the experience of being in a beloved part of the world (Crommelin, Troy et al. 2018; Guttentag 2019).

Social disbenefits of STRA include conflict between family life and the work required to maintain a STRA property, and blurring of work/life boundaries.

While these points apply particularly to hosted STRA, the pressure to be responsive to guests also applies to non-hosted STRA (de Janasz, Kim et al. 2022).

Other perspectives

Aside from financial and social motivators, STRA hosting is driven by a pro-sharing philosophy, having the flexibility to use the property, and minimising wear and tear on a property compared to long-term rental (Crommelin, Troy et al. 2018; Renuka 2019).

Landlords' intentions to continue with STRA are reduced by perceived financial, safety, security and political risks (Semi and Tonetta 2021), along with the workload involved in managing a STRA property (Crommelin, Troy et al. 2018).

4.2 Landlord perceptions of STRA in Australia: PIPA survey

4.2.1 STRA landlord demographics

In the 2024 Property Investor Sentiment Survey, 1,100 PIPA members responded to STRA-specific questions. Of these:

- 70 members (6.36%) currently own a STRA property.
- 49 (70%) of the 70 STRA owners had one STRA property only. For six (8.57%) this was their only investment property.
- A small proportion (4.34%) of those with STRA properties reported having six or more STRA properties.

As shown in Table 17, owners of STRA properties tended to be older than those who did not own STRA properties ($\chi^2(4)=25.08$, $p < .001$), but no gender difference was identified.

Table 17: Age of respondents who answered STRA questions in PIPA survey

Age	Own STRA property		
	No	Yes	All
26–35 years	15.08%	4.29%	14.39%
36–45 years	33.85%	21.43%	33.06%
46–55 years	31.03%	32.86%	31.15%
56–65 years	15.27%	35.71%	16.58%
66+ years	4.77%	5.71%	4.83%

Source: Data from the PIPA Property Investor Sentiment Survey 2024.

4.2.2 Transitions between STRA and long-term rental markets

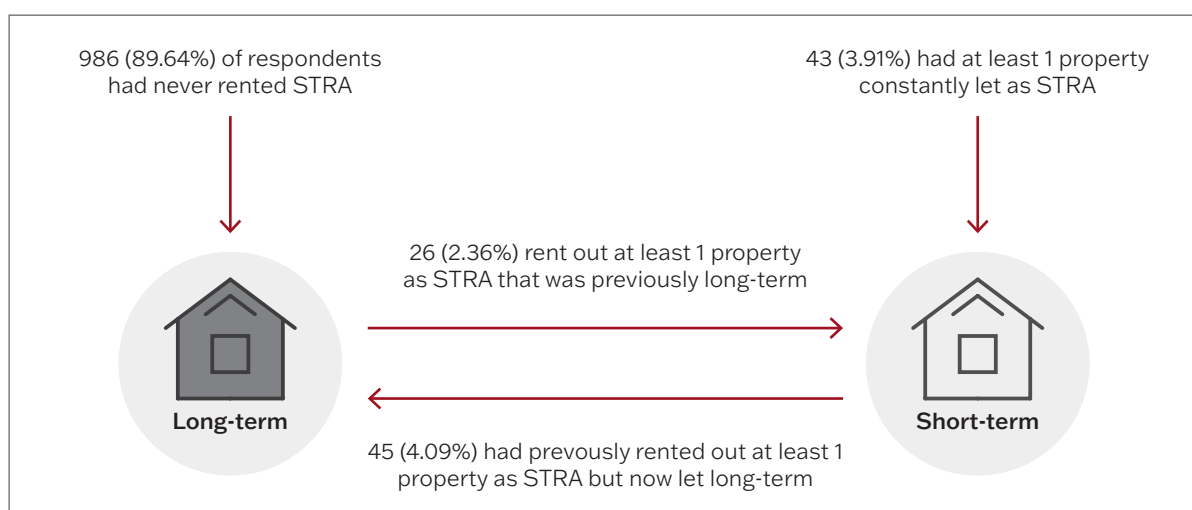
Figure 1 shows the long-term activities of landlords in STRA and long-term letting. The vast majority of respondents (almost 90%) did not let a property as STRA, and had not in the past five years. This compares with a small minority (just under 4%) who had at least one property that had always been let as STRA.

In the five years before the survey:

- A small proportion of landlords (2.36%) had moved homes from the long-term market into STRA.
- A larger proportion (4.09%) had moved a STRA property into the long-term market.

Of the landlords who have listed a property as STRA (n=116), nearly two-thirds (62.28%) reported shifting their properties between the short-term and long-term rental markets, which indicates a high degree of flexibility in property use. While PIPA-member data may not reflect the broader STRA landlord population, these findings suggest that movement between long-term and short-term rental markets is common.

Figure 1: Property status of 2024 PIPA Property Investor Sentiment Survey respondents



Source: Data from the PIPA Property Investor Sentiment Survey (2024).

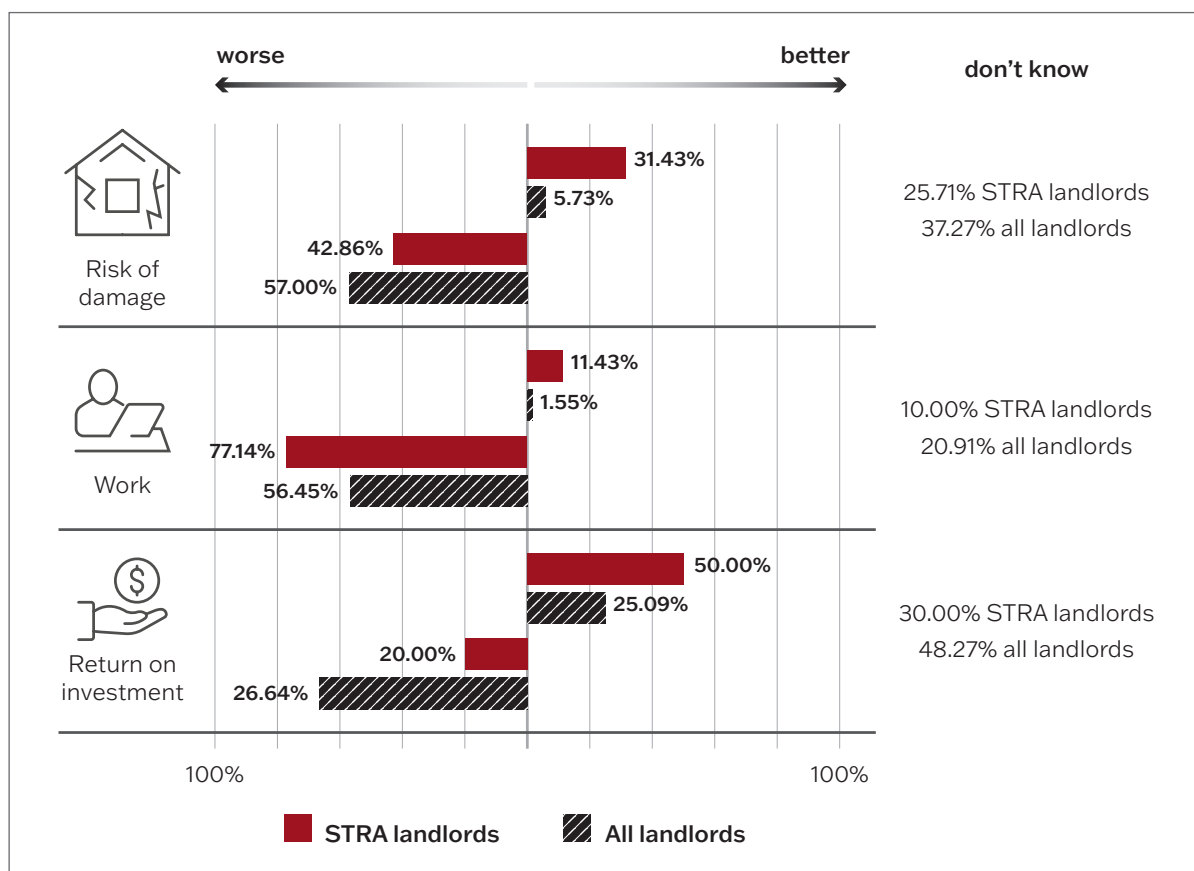
4.2.3 Perceptions of STRA

Figure 2 shows PIPA members' perceptions of the return on investment, risk of property damage, and the amount of work associated with renting out a STRA property compared to renting out a property in the long-term market.

All responses (black bar) are compared to responses from landlords that currently let out a STRA property (red bar). There are areas of consensus and disagreement, as follows.

- Most respondents in both groups perceive STRA properties as riskier in terms of potential damage. However, nearly one-third (31%) of STRA landlords believe the risk is lower, compared to just over 5% of all respondents. Uncertainty is high, with a quarter (25%) of STRA landlords and over a third (37%) of all respondents unsure.
- The majority of both STRA and non-STRA landlords agree that STRA involves more work than long-term renting. For some, this question was not applicable, likely due to outsourcing property management.
- Over three-quarters (77%) of STRA landlords believe that STRA properties are more work than long-term rentals. However, this appears to be offset by the belief that STRA properties generate a better return on investment.
- Half of STRA landlords report that STRA properties generate a better return on investment, compared to a quarter (25%) of all landlords. This was an area of uncertainty. Nearly a third (30%) of STRA landlords and nearly half (48%) of all respondents were unsure which mode resulted in a greater return on investment.

Figure 2: Perceptions of STRA properties



Source: Data from the PIPA Property Investor Sentiment Survey (2024).

Note: 'not applicable' was also a response option for the question regarding work, which likely reflects the potential use of management agents/property managers. Each vertical gridline represents 20%.

4.3 Landlord perceptions of STRA in Australia: Q-sort

Fourteen current or past STRA landlords sorted 36 statements (see Appendix 9) about their decisions regarding listing property on the STRA market. From this, we identified three distinct groups:

- **Factor 1: Investment-focussed**
- **Factor 2: Social connection**
- **Factor 3: Ethical and economic considerations.**

These factors provide preliminary insights into the motivations and concerns of STRA landlords.

Tables 18–25 summarise key statements for each factor, highlighting those with the strongest agreement (Consensus statements) or disagreement, as well as Distinguishing statements, which help define the unique perspectives of each group:

- *Distinguishing statements* are those with statistically significant differences ($p < .05$) between factors.
- *Consensus statements* reflect shared views across all three groups (see Appendix 10).

Composite sorts for each factor are presented in Appendices 11–14. These are hypothetical Q-sorts that represent the collective viewpoint of participants who loaded significantly on to each factor, created by averaging their individual Q-sorts. The composite sorts in Appendices 11–14 are displayed in the same format as the Q-sort grids completed by participants, showing the average relative ranking of all statements, from most agreed with to most disagreed with.

4.3.1 Factor 1: STRA as an investment tool

Factor 1 was the largest group, with six defining participants. They tended to express a preference for STRA as a flexible financial investment. Factor 1 participants tended to outsource the everyday operations of STRA and had minimal contact with guests.

Statements that reflected influences on STRA decisions for Factor 1

The highest ranked statement for this group was *STRA gives me flexibility to use my property when and how I want to*.

Participants in this group generally framed STRA as an asset that provides both income and personal access, aligning with broader trends towards the professionalisation of STRA. As one participant stated: *'It's a holiday house, so the flexibility part is really important. It means I can rent it out when I want, but still use it myself when I need to.'*

Factor 1 participants exhibited a highly transactional approach to STRA. The emphasis was primarily on profitability, with high levels of agreement with statements relating to the costs of operating a STRA property, such as: *'There are more costs with STRA than with long-term rental'* and *'Taxes drive up the price of owning an investment property.'*

Factor 1 participants suggested that additional regulatory costs would likely be passed on to consumers rather than absorbed by hosts. One Factor 1 participant expressed frustration with increasing taxation: *'We're already paying a lot in rates, maintenance and cleaning. If they introduce more taxes, it'll just be added to the nightly rate.'* Table 18 presents the key statements with which Factor 1 participants agreed.

Table 18: Statements that characterise Factor 1: High level of agreement

Statements	F1	F2	F2b	F3
Highest ranked statement				
STRA gives me flexibility to use my property when and how I want to.	5	2	-3	3
Positive statements ranked higher in Factor 1 array than in other factor arrays				
There are more costs with STRA than with long-term rental.	4	3	0	-1
Guests expect STRA properties to be as professional as hotels these days.	3	2	-2	3
STRA means that I can use the property in future if my needs change. (C)	2	0	1	2
Income from STRA has peaks and troughs.	2	2	1	-2
Tenants in long-term rental have greater rights/powers over my property than in STRA.	1	1	-1	-3
The public perception is that all STRA owners are rich.	1	1	-1	-2
STRA is less profitable when more people are doing it.	1	-2	-2	0
Before STRA, my property was not fully utilised (e.g. holiday house).	0	-1	-1	-2
STRA gives me work that can fit in around caring responsibilities.	0	0	-3	-1

Source: Authors.

Note: C = Consensus statement.

Statements that did not reflect influences on STRA decisions for Factor 1

The lowest ranked statement for Factor 1 was *Online payments for STRA are a risk for property owners*. This was also the lowest ranked statement for Factor 2, reflecting that digital transactions are generally perceived to be a normal part of life rather than a STRA-specific risk. One participant explained this by noting: *'Payments are all online now. I don't even think about it—it's just like any other business transaction.'*

Other statements ranked low by Factor 1 participants were those related to engaging with guests—for example, *STRA is a way to learn about other cultures and STRA is a way to meet new people*. Factor 1 participants had minimal contact with guests, so the social aspects of STRA did not apply to them. As a Factor 1 participant explained: *'We're completely autonomous. We don't go near the place when there's a guest there.'* Table 19 presents the key statements with which Factor 1 participants disagreed.

Table 19: Statements that characterise Factor 1: Low level of agreement

Statements	F1	F2	F2b	F3
Lowest ranked statement				
Online payments for STRA are a risk for property owners.	-5	-5	2	-2
Negative statements ranked lower than in other factor arrays				
There are more opportunities to keep an eye on the property if it is rented as STRA.	0	4	1	2
STRA helps to cover the costs of owning/renting the home that I live in (e.g. mortgage, rent, renovations).	-1	0	0	3
STRA guests can cause problems by staying past check-out time. (C)	-1	-1	2	-1
STRA helps me to afford the rising cost of living.	-1	1	0	1
STRA is a way to meet new people. (C)	-2	0	-2	0
STRA has become more professional and less friendly.	-2	-2	0	1
STRA causes more wear and tear than long-term rentals.	-2	-2	4	0
STRA has allowed me to start a business.	-3	4	0	0
STRA is a way to learn about other cultures.	-3	0	-1	-3
STRA is a way to share my culture with others. (D*)	-3	1	0	0
Hosting people with different political backgrounds can be a challenge for STRA owners. (C)	-4	-4	-2	-4

Source: Authors.

Notes: D*= Distinguishing statement $P < .01$; C = Consensus statement.

4.3.2 Factor 2: STRA for social and lifestyle benefits

Three participants defined Factor 2. In contrast with Factor 1, Factor 2 participants tended to value the personal engagement and social connections that come with STRA hosting. In addition to financial benefits, Factor 2 hosts placed a high value on the enjoyment they experienced from having guests in their STRA properties. While they outsourced some operational aspects, they were highly engaged with hospitality and guest experiences.

Statements that reflected influences on STRA decisions for Factor 2

Factor 2 participants showed relatively high agreement with statements related to cultural exchange and personal fulfilment through hosting. Their motivations extended beyond financial returns to include identity and lifestyle benefits. The highest ranked statement for Factor 2 was: *I enjoy making STRA guests happy.*

One participant explained how their relationship to the property went beyond financial benefits: *'Hosting is about more than money for me. I really enjoy meeting guests, sharing stories, and making them feel at home.'*

Although Factor 2 participants outsourced operational tasks such as cleaning, they retained direct involvement in guest interactions. An example shared by a Factor 2 participant is: *'I leave little welcome gifts and personal notes for guests, it's about creating an experience, not just a place to stay.'* Table 20 presents the key statements with which Factor 2 participants agreed.

Table 20: Statements that characterise Factor 2: High level of agreement

Statements	F2	F2b	F1	F3
Highest ranked statement				
I enjoy making STRA guests happy. (D*)	5	2	-1	1
Positive statements ranked higher in Factor 1 array than in other factor arrays				
STRA has allowed me to start a business. (D*)	4	-3	0	0
There are more opportunities to keep an eye on the property if it is rented as STRA.	4	0	1	2
STRA platforms provide hosts with positive feedback.	3	1	-3	-1
Income from STRA has peaks and troughs.	2	2	1	-2
STRA allows me to give others the same opportunities I have had when travelling. (D*)	2	-1	-4	-1
Tenants in long-term rental have greater rights/powers over my property than in STRA.	1	1	-1	-3
STRA is a way to share my culture with others.	1	-3	0	0
The public perception is that all STRA owners are rich.	1	1	-1	-2
STRA helps me to afford the rising cost of living.	1	-1	0	1
STRA is a way to meet new people. (C)	0	-2	-2	0
STRA gives me work that can fit in around caring responsibilities.	0	0	-3	-1
STRA is a way to learn about other cultures.	0	-3	-1	-3

Source: Authors.

D* = Distinguishing statement $P < .01$; C = Consensus statement.

Statements that did not reflect influences on STRA decisions for Factor 2

Similar to Factor 1, Factor 2 participants' strongest disagreement was that online payments pose a risk for STRA owners. In keeping with their enjoyment of STRA, Factor 2 participants also disagreed with the statements *Managing a STRA is hard work* and *The work required to keep a STRA property clean and appealing can be unpleasant*. This was reflected in one participant's comment: *'It's work, but it's not really hard work.'*

Factor 2 participants saw STRA as a way to enhance local communities by bringing in visitors, creating jobs, or revitalising areas that might otherwise have vacant properties. Some saw their role as extending beyond mere business transactions; they considering themselves ambassadors for their local area, often providing guests with tailored recommendations and personalised experiences. Table 21 presents the key statements with which Factor 2 participants disagreed.

Table 21: Statements that characterise Factor 2: Low level of agreement

Statements	F2	F1	F2b	F3
Lowest ranked statement				
Online payments for STRA are a risk for property owners.	-5	-5	2	-2
Negative statements ranked lower than in other factor arrays				
STRA means that I can use the property in future if my needs change. (C)	0	2	1	2
There is a lot of administration in running a STRA property.	0	2	3	1
STRA guests can cause problems by staying past check-out time. (C)	-1	-1	2	-1
Managing reviews can be stressful.	-1	1	1	2
STRA has become more professional and less friendly.	-2	-2	0	1
It is difficult to get reimbursed if STRA guests cause damage. (D)	-2	0	3	0
STRA is less profitable when more people are doing it.	-2	1	-2	0
STRA causes more wear and tear than long-term rentals.	-2	-2	4	0
The work required to keep a STRA property clean and appealing can be unpleasant. (D*)	-3	0	2	4
Putting a property onto STRA means that it is no longer a private space.	-3	-1	2	-3
Hosting people with different political backgrounds can be a challenge for STRA owners. (C)	-4	-4	-2	-4
Managing a STRA is hard work. (D*)	-4	3	4	2

Source: Authors.

D = Distinguishing statement $P < .05$, D* = Distinguishing statement $P < .01$, C = Consensus statement.

4.3.3 Factor 2b: STRA is not worth the stress

People in Factor 2 found joy in STRA, but one participant had the opposite experience, describing it as stressful and unprofitable. They responded to statements in the reverse direction of Factor 2: they disagreed with what others agreed with and agreed with what others disagreed with. In Q-methodology this is called a *negative loading*, meaning that they sit at the opposite end of the spectrum. This participant is captured as Factor 2b (Stressed out). The Factor 2b participant no longer rents a property as STRA.

Statements that reflected influences on STRA decisions for Factor 2b

The Factor 2b participant's strongest agreements were with statements that highlighted the difficulty of STRA ownership, such as those relating to hard work, wear and tear, and taxes. The Factor 2b participant commented: 'Whenever there is a guest, I'm so stressed.' Table 22 presents the key statements with which the Factor 2b participant agreed.

Table 22: Statements that characterise Factor 2b: High level of agreement

Statements	F2b	F1	F2	F3
Highest ranked statement				
Taxes drive up the price of owning an investment property.	5	4	-1	-4
Positive statements ranked higher in Factor 2b array than in other factor arrays				
Managing a STRA is hard work.	4	3	-4	2
STRA causes more wear and tear than long-term rentals. (D*)	4	-2	-2	0
It is difficult to get reimbursed if STRA guests cause damage. (D)	3	0	-2	0
There is a lot of administration in running a STRA property.	3	2	0	1
Online payments for STRA are a risk for property owners. (D*)	2	-5	-5	-2
Putting a property onto STRA means that it is no longer a private space. (D)	2	-1	-3	-3
STRA guests can cause problems by staying past check-out time. (D)	2	-1	-1	-1
I have worried about my safety around STRA guests. (D*)	1	-4	-3	-5

Source: Authors.

D = Distinguishing statement $P < .05$, D* = Distinguishing statement $P < .01$.**Statements that did not reflect influences on STRA decisions for Factor 2b**

Factor 2b was the only factor with a strong disagreement with the statement: *STRA makes more money than long-term rentals*. Factor 2b had a property in a suburban location without a strong tourist draw and had struggled to consistently rent out the STRA property. Table 23 presents the key statements with which the Factor 2b participant disagreed.

Table 23: Statements that characterise Factor 2b: Low level of agreement

Statements	F2b	F1	F2	F3
Lowest ranked statement				
STRA makes more money than long-term rentals. (D*)	-5	0	1	5
Negative statements ranked lower than in other factor arrays				
I enjoy making STRA guests happy.	-1	2	5	1
STRA is less profitable when more people are doing it.	-2	1	-2	0
STRA is a way to meet new people. (C)	-2	-2	0	0
Guests expect STRA properties to be as professional as hotels these days. (D*)	-2	3	2	3
STRA gives me work that can fit in around caring responsibilities.	-3	0	0	-1
STRA gives me flexibility to use my property when and how I want to. (D*)	-3	5	2	3
STRA platforms provide hosts with positive feedback.	-3	1	3	-1
My STRA property is convenient for my job sometimes.	-4	-2	-1	1
STRA allows me to give others the same opportunities I have had when travelling. (D)	-4	-1	2	-1

Source: Authors.

Notes: D = Distinguishing statement $P < .05$, D* = Distinguishing statement $P < .01$, C = Consensus statement.

4.3.4 Factor 3: Ethical and economic considerations

Factor 3 had four defining participants. Of these, two were no longer renting their properties full-time on the STRA market. Factor 3 participants exhibited a somewhat conflicted perspective on STRA, acknowledging its financial benefits while expressing concerns about the potential negative impacts of STRA on housing markets and communities.

Statements that reflected influences on STRA decisions for Factor 3

The most highly ranked statement for Factor 3 was: *STRA makes more money than long-term rentals*. One Factor 3 participant explained that STRA has '*higher costs, but much, much higher revenue*' than long-term rentals. Factor 3 participants were more likely than other groups to use income from STRA to help cover the costs of their own home, as well as cover the costs of having an investment property.

Factor 3 participants performed some hands-on work associated with STRA. Participants who had outsourced STRA management and cleaning observed that there was still a workload from STRA when problems arose or STRA management companies were unreliable. A participant who had experienced ongoing difficulties explained that outsourcing property management did not reduce the STRA workload: '*Actually, it [managing the property myself] was less work because I spent so much time holding them to account.*' Table 24 presents the key statements with which Factor 3 participants agreed.

Table 24: Statements that characterise Factor 3: High level of agreement

Statements	F3	F1	F2	F2b
Highest ranked statement				
STRA makes more money than long-term rentals. (D*)	5	0	1	-5
Positive statements ranked higher in Factor 3 array than in other factor arrays				
The work required to keep a STRA property clean and appealing can be unpleasant.	4	0	-3	2
STRA helps with the ongoing costs of having an investment property (e.g. mortgage, rates, maintenance, renovations). (C)	4	3	3	3
STRA helps to cover the costs of owning/renting the home that I live in (e.g. mortgage, rent, renovations). (D)	3	-1	0	0
Guests expect STRA properties to be as professional as hotels these days.	3	3	2	-2
STRA means that I can use the property in future if my needs change. (C)	2	2	0	1
Managing reviews can be stressful.	2	1	-1	1
STRA helps me to afford the rising cost of living.	1	-1	1	0
STRA has become more professional and less friendly.	1	-2	-2	0
My STRA property is convenient for my job sometimes.	1	-2	-1	-4
STRA is a way to meet new people. (C)	0	-2	0	-2

Source: Authors.

Notes: D = Distinguishing statement $P < .05$, D* = Distinguishing statement $P < .01$, C = Consensus statement.

Statements that did not reflect influences on STRA decisions for Factor 3

Factor 3's most strong disagreement was with the statement *I have worried about my safety around STRA guests*. While Factor 3 disagreed with this statement more strongly than the other factors, personal safety was not a strong concern for any group.

Similar to Factor 1, Factor 3 participants felt that the cost of taxes or levies would be passed on to consumers. In contrast to Factor 1, participants in Factor 3 were receptive to taxation and regulation, with some viewing policy interventions as necessary to balance STRA's impact on housing markets. One participant felt that: *'STRA makes significant profits, and these profits should be taxed fairly.'*

In addition to being supportive of taxes or levies, Factor 3 participants did not see them as a reason to discontinue STRA. As one Factor 3 participant reflected: *'I don't see how it's actually going to influence my decision.'*

Several Factor 3 participants expressed a degree of moral ambivalence about their participation in STRA, suggesting that while it provided financial benefits, it could also contribute to housing shortages and affordability issues. *'I'm not against STRA, but I can see why it's controversial. If too many homes are used for short-term rentals, it can push up rents for locals.'* Table 25 presents the key statements with which Factor 3 participants disagreed.

Table 25: Statements that characterise Factor 3: Low level of agreement

Statements	F3	F1	F2	F2b
Lowest ranked statement				
I have worried about my safety around STRA guests.	-5	-4	-3	1
Negative statements ranked lower than in other factor arrays				
STRA guests can cause problems by staying past check-out time. (C)	-1	-1	-1	2
There are more costs with STRA than with long-term rental.	-1	4	3	0
The public perception is that all STRA owners are rich.	-2	1	1	-1
Income from STRA has peaks and troughs. (D)	-2	2	2	1
Before STRA, my property was not fully utilised (e.g. holiday house).	-2	0	-1	-1
STRA is a way to learn about other cultures.	-3	-3	0	-1
Tenants in long-term rental have greater rights/powers over my property than in STRA. (D)	-3	1	1	-1
Putting a property onto STRA means that it is no longer a private space.	-3	-1	-3	2
Hosting people with different political backgrounds can be a challenge for STRA owners. (C)	-4	-4	-4	-2
Taxes drive up the price of owning an investment property. (D*)	-4	4	-1	5

Source: Authors.

Notes: D = Distinguishing statement $P < .05$, D* = Distinguishing statement $P < .01$, C = Consensus statement.

4.3.5 Consensus statements

Certain perspectives were widely shared across all factors. A comparison of Q-sort values for consensus statements is included in Appendix 10.

STRA was generally seen as a profitable endeavour by all groups (apart from the single participant in Factor 2b), regardless of the motivation behind their participation. Many participants commented on the costs associated with STRA and the variability in income—particularly in locations with seasonal tourism. However, for most participants, these costs were outweighed by the higher income generated by STRA than long-term rental.

Participants largely agreed that STRA had become more professionalised over time, that guests expect STRA properties to meet standards set by hotels, and that the level of personal interaction between hosts and guests has reduced. Overall, participants expressed pride in delivering a professional service, though some felt that rising expectations of professionalism were accompanied by declining friendliness and greater pressure. As one participant reflected:

I think back then it was less commercialised or professional. I don't think there were many hosts that had professional managers and had little to do with guests or the day-to-day management. There's still a few [who self-manage], but I've noticed there's a lot more [outsourcing] now.

In keeping with this shift toward outsourcing guest interactions, most participants rejected the notion that meeting new people is a primary driver of STRA. Several participants noted that they had never met a STRA guest. One participant commented that there has been a reduction in demand from guests for personal connections:

[More recent STRA guests] didn't care so much about the experience and meeting others and sharing culture with the host. [Early adopters of STRA were] there to immerse themselves in someone else's culture ... It then became mainstream and the norm. And it just became another booking website.

Some participants in regional towns noted that vacant properties negatively impact communities and that STRA can help to revitalise areas by ensuring that holiday homes are occupied when the owners are not using them:

Empty holiday homes are really a burden on a small-town community because empty holiday homes don't employ cleaners. They don't employ managers. They don't bring people to town on a weekly basis.

Comparing perspectives

During this research period, the state of Victoria introduced a 7.5% levy on STRA. The following quotes illustrate contrasting views between a Factor 1 participant (STRA as an investment tool) and a Factor 3 participant (Ethical and economic considerations):

The short-stay taxes, the land taxes, fire-levy taxes. It's just, in Victoria in particular, it's becoming unaffordable to actually have an investment property. (Factor 1 participant)

Okay, yes, I won't make quite as much money but I get the purpose of the tax. (Factor 3 participant)

4.4 Policy development implications

Policy concerns

STRA is primarily a private enterprise and, as expected, STRA landlords are motivated by profit. However, we found evidence that some STRA landlords are also influenced by social and ethical factors.

If governments want to regulate STRA—and especially if they want regulation to induce changes in behaviour, such as compliance with new taxes or fees, or choosing particular localities for investment over others—it will help if the regulators understand what motivates STRA landlords to conduct their business the way they do. Until now, very little information was available on the motives of STRA landlords in Australia and the factors that guide their behaviour.

With the support of PIPA—the national-level industry association for property investment professionals—we surveyed PIPA members about their perspectives on STRA. The survey yielded the following insights.

- STRA is still a very small component of the overall rental market relative to individual landlords. Only 10% of survey respondents had listed a STRA property in the last five years, and only 6% of survey respondents currently had a STRA property for rent.
- Landlords frequently transition properties between the STRA sector and long-term rentals. Forty per cent of survey respondents who had listed a STRA property in the last five years had already converted it to a long-term rental, and almost a quarter (23%) had converted a long-term rental into a STRA property. Only just over a third (37%) of STRA-listing survey respondents had had a STRA property that was consistently STRA for all of the last five years.
- In general, landlords believe that STRA comes with inherent downsides relative to conventional long-term rental. Over half (57%) of survey respondents believed that STRA was more risky in terms of damage to the property than long-term rental, and over half (56%) of respondents felt that STRA required more work than conventional long-term rental. These trends were apparent even among STRA landlords, of whom almost half (43%) responded that STRA was riskier to the property and over two-thirds (77%) responded that STRA required more work.
- There was no consensus on whether STRA is more profitable than conventional long-term rental. Among all survey respondents, a quarter (25%) thought that STRA was more profitable, another quarter (27%) felt that STRA was less profitable, and almost half (48%) responded 'Don't know'. STRA landlords who completed the survey were less equivocal but also not really approaching consensus: half (50%) of these respondents thought that STRA was more profitable than conventional long-term rental but a fifth (20%) thought it was less profitable, and a sizeable minority of 30% responded 'Don't know'.

We also identified groups of STRA landlords using Q-methodology:

- **'Investment focussed':** STRA landlords who are mainly motivated by profit. Landlords in this category appear to be sensitive to financial regulation of the industry, and claim they would exit if taxes or fees were raised, or would pass costs on to guests.
- **'Social connection':** STRA landlords who are motivated at least in part by the desire to meet people and to provide a positive experience for guests. Landlords in this category have non-material incentives and may not respond to financial regulation as strongly as investment-focussed landlords would.
- **'Stressed out'** ('Social connection' polar opposite): STRA landlords who find STRA to be unpleasant and unprofitable. These landlords are looking for a reason to exit the market, and would be most likely to respond to incentive programs to discontinue STRA rentals.
- **'Ethical and economic considerations':** STRA landlords who recognise the potential for STRA to have unintended consequences and feel a responsibility to help mitigate negative outcomes. Landlords in this category support regulation but would be less likely to exit STRA based on financial disincentives like taxes and fees.

Policy implications

Overall, the STRA sector is somewhat fickle, with many landlords moving properties in and out of STRA over the past five years. Given this turnover, any increased regulatory burden could prompt STRA landlords to exit the market.

To be effective, any STRA regulatory system must account for the various profiles of STRA landlords and the kinds of incentives and disincentives they respond to. Given this diversity, a STRA regulatory system may require multiple policy levers to influence behaviour across the STRA sector.

The preliminary findings presented in this report indicate that landlords with differing perspectives may respond differently to STRA policies, as outlined below.

- While the STRA market is professionalising and maturing, with many tasks now outsourced, many landlords still view STRA as being onerous and perhaps not always worth the extra work. Landlords who find STRA more stressful than other forms of investment are more likely to exit the market in response to new policies.
- Many profit-focussed landlords object to additional regulation—especially financial disincentives. They say that they are likely to respond to financial disincentives by exiting the market or passing costs on to guests, especially those landlords who already believe their profit margins to be too thin.
- Landlords who support the introduction of regulations, taxes and fees due to concerns about community impacts state that they are less likely than profit-focussed landlords to change their behaviour in response to new policies.
- Similarly, landlords with social motivations for engaging in STRA are less likely to discontinue STRA in response to financial incentives or disincentives.

This study shows that the STRA community holds diverse perspectives. Context-specific research could provide deeper insights into the range of views held by STRA landlords in different locations. To anticipate how STRA landlords will respond to specific policies, policy makers should collect data on the prevalence of these perspectives within the target jurisdiction.

5. Policy development options

Australia's housing crisis has intensified pressure on policy makers to address the impact of STRA on housing affordability and availability. STRA is concentrated in tourist-attractive areas, and its effects vary by location. In some regions, STRA supports local communities and businesses with minimal impact on housing. In other places—particularly where STRA density is high—it reduces the supply of homes available for permanent residents.

STRA regulation must be flexible and tailored to local conditions. However, in jurisdictions without a registration scheme, the lack of reliable data makes it difficult to assess STRA's local impact on housing supply. Beyond housing availability, STRA can affect neighbouring properties. Common concerns include noise, parking congestion, dumped rubbish, and a shift in local shops and services towards tourists rather than residents.

5.1 Key research questions

5.1.1 How has STRA changed since the advent of sharing platforms such as Airbnb?

STRA has grown over time

Some form of STRA has long been part of local tourism and housing sectors for many places in Australia. The advent of online booking platforms has made it easier for owners and travellers to participate in STRA. In some areas, this shift has had minimal impact. Locally managed STRA properties have simply transitioned to online bookings. Low STRA density or increased use of previously vacant holiday homes mean that housing availability has not significantly changed.

In other locations, STRA has expanded to levels that affect local communities substantially. Some residential areas that previously had little or no tourist accommodation now have a significant share of homes used for STRA. In areas with a history of STRA, growing density has worsened housing affordability and availability. While STRA can benefit local tourism businesses, these gains are often offset by housing shortages that make it difficult to find accommodation for staff.

Non-hosted STRA now outweighs hosted STRA in Australia

While STRA is often framed as a sharing activity, such as renting out a spare room or a home that is vacant when householders go on holidays, the reality is shifting. Research by Crommelin, Troy et al. (2018) shows a significant share of the STRA market involves entire homes rented out all or most of the time. Our research confirms this trend. Between 2019 and 2023, non-hosted STRA—where the entire property is rented without the host present—continued to grow. Today, non-hosted listings outnumber hosted STRA properties across Australia.

This shift raises policy concerns. Non-hosted STRA removes whole homes from the long-term rental market, which directly affects housing supply. Notably, growth has been strongest among properties with three or more bedrooms, which suggests a move away from smaller dwellings like apartments and townhouses, and towards fully detached family homes.

STRA is increasingly concentrated in regional tourist hot spots

Although non-hosted STRA grew overall between 2019 and 2023, the trend is not uniform. Some capital cities saw reductions, while regional tourist towns—especially coastal areas—experienced continued growth. STRA density varies widely between LGAs and even between suburbs within LGAs. For example, a beachside suburb popular with holidaymakers can have a much higher density of STRA than neighbouring suburbs. The concentration of STRA in specific locations highlights the importance of locally tailored STRA regulations that meet the needs of local communities.

Policy makers have different objectives for regulating STRA in different contexts, as outlined below.

- Where high STRA density has reduced the supply of housing for permanent residents, policy makers may want to disincentivise STRA.
- In towns with many vacant holiday homes, the goal may be to encourage STRA to activate underutilised housing.
- In places where communities and local businesses have adapted to STRA and rely on it—but where STRA density is affecting long-term housing supply—governments may want to avoid policies that produce a sharp drop in STRA. Instead, the focus is to disincentivise new STRA, earmark new developments for permanent residents only, or incentivise a gradual reduction in STRA numbers.

There is no one-size-fits-all regulation to meet the variety of locally relevant policy objectives for the STRA sector.

State-based regulations should support locally-targeted policies

Local governments are best positioned to tailor STRA regulation to community needs, but they often lack the resources to independently implement and enforce these regulations. Higher levels of government can support local governments by maintaining a statewide registration of STRA properties, and sharing property-level data such as owner/manager contact details and compliance records.

Government at state, territory and federal level can also adopt a standard definition of STRA to differentiate it from other forms of tourist lodgings and long-term accommodation (Western Australian Planning Commission 2024). A standard definition of STRA would enable local governments to develop region-specific planning rules, while maintaining policy coherence across jurisdictions.

State and federal governments can review incentives, disincentives, planning requirements and limits that have been applied to STRA in varying tourism and housing contexts internationally to draw learnings for local contexts across Australia.

Increasing professionalisation of STRA

Alongside the growth of non-hosted STRA, there has been a trend towards professionalisation of the STRA sector. While it is not possible to precisely state the number of properties managed by third-party property managers, or serviced by professional cleaners or laundry services, the sharp increase in listings by individuals with multiple properties suggest that professional agencies are increasingly listing properties on behalf of STRA landlords. Both policy makers and STRA landlords have noted a shift toward outsourcing.

This trend presents an opportunity for more effective regulation. Instead of dealing with numerous individual property owners, policy makers can work directly with a smaller group of professional property managers to ensure compliance with planning rules and safety standards, such as fire regulations and pool safety.

Professionalisation also helps local governments to manage community impacts more effectively. Some councils report challenges in contacting individual STRA landlords when complaints arise. Working with professional management companies tends to streamline communication and enforcement. Additionally, several LGAs now require STRA properties to display signage with contact details for someone who can respond to complaints within a specified timeframe. These rules are generally easier to enforce when properties are professionally managed, as individual landlords may not be available, especially if complaints occur late at night. In addition, some professional STRA managers use technology such as remote monitoring of noise levels and guest numbers to proactively prevent disruptions to neighbouring properties.

5.1.2 What data are needed to make good decisions about managing the impacts of STRA?

Reliable, up-to-date data is critical for policy makers to monitor STRA activity and assess the impacts of regulatory changes. However, stakeholders have highlighted significant concerns about both undercounting and overcounting in the available data.

Undercounting: registration-based data:

- Property registration relies on voluntary compliance by owners, which likely leads to underreporting.
- Local governments face high costs and administrative burdens when conducting compliance checks to verify unregistered listings.

Overcounting: web-scraped data:

- Traditional tourist accommodation such as hotels, motels and caravan parks are often included in STRA platform data.
- Properties that are listed in multiple formats can be counted more than once—for example, a property listed as both a whole home and as individual rooms.

These duplications can be removed—as we have done in this study—but doing so is burdensome for LGAs.

One challenge of web-scraped data that cannot be accounted for by the end user is that STRA properties are typically listed on multiple platforms. Datasets such as Inside Airbnb only capture information from Airbnb and cannot account for properties listed on other platforms. Shifts between platforms appear as shifts into or out of the STRA market if single-platform data are used, as in this study. Other web-scraping datasets, such as AirDNA, scrape data from multiple platforms, which likely leads to multiple counting of properties that are listed on more than one platform.

Another limitation of web-scraped data is that it does not distinguish between individual owners and professional managers, which leads to potential misrepresentation of ownership patterns. In addition, relying on web-scraped data means that policy makers are dependent on the platforms' willingness to share data. If platforms change how they categorise listings or restrict scraping, data reliability can rapidly decline. For example, changes to classification of houses and apartments made it impossible to directly compare property numbers in those categories between 2019 and 2023 for this study.

These problems can be overcome with nationally consistent, state-based STRA registration schemes.

Western Australia, New South Wales and several LGAs, such as Bass Coast and Mornington Peninsula Shire Councils, already require STRA properties to be registered. Registration should include a definition of STRA that applies nationally and can be used in state and territory planning schemes. While local policies are best suited to address STRA's uneven distribution across Australia, consistency helps the sector invest and comply with regulations.

Data collection should do the following:

- Differentiate between full-time, whole-house STRA, homes that are rented as STRA when residents go on holiday, individual STRA rooms within a principal place of residence, or alternative accommodations such as yurts or caravans.
- Identify properties that are listed by third-party management companies, which would enable improved estimates of the number of STRA properties held by individual landlords.
- Inform a flexible regulatory regime to ensure that STRA properties are fit for purpose—for example, requiring smoke alarms and insurance.
- Provide evidence that can be used to improve the accuracy of predictions of income from STRA taxes or levies, and modelling of impacts of STRA policies on housing affordability and availability in different locations.

5.1.3 How do property owners' perspectives influence their decisions about STRA?

It is often assumed that property owners make decisions about whether to place a home into STRA or long-term housing markets based purely on financial calculations. This research project confirms the importance of financial costs and benefits in STRA landlords' decision-making.

However, we also identified several non-financial beliefs and attitudes that impact STRA landlords' decisions. These beliefs and attitudes may alter the effectiveness of financial levers, or provide alternative mechanisms to manage STRA.

STRA landlord groups

This project identified three main groups of STRA landlords, each with distinct motivations and attitudes.

Factor 1: Investment-focussed

- Primarily driven by costs and financial returns.
- Most likely to exit STRA if new taxes or levies are introduced.

Factor 2: Social connection

- See STRA as more than a business.
- Gain personal satisfaction from hosting and promoting their local area.
- Highly committed to remaining in STRA.

Factor 3: Ethical and economic considerations

- Participate in STRA for profit, but express concern about its impact on housing availability.
- May be open to non-financial appeals to exit the STRA market.

Financial disincentives have mixed effects

Factor 1 landlords were the most likely to say they would remove properties from the STRA market if taxes or levies were introduced.

All three landlord groups showed a diversity of responses toward taxes or levies:

- Some would continue operating in STRA and pass the additional costs on to guests—resulting in higher prices for tourists.
- Others said their properties would remain profitable enough that they could simply absorb the extra costs.

While raising the cost of STRA does not directly return properties to the long-term rental market, it could reduce demand from tourists. This, in turn, may increase vacancy rates, making STRA less attractive compared to the steady income of long-term rentals. However, this is an indirect effect and does not guarantee an increase in housing availability for residents.

To assess the likely impact of financial levers like taxes or levies, further research is needed to understand how common these attitudes are across the broader STRA landlord population. The diversity of landlord perspectives underscores the need to assess the impact of financial measures—such as Victoria’s STRA levy—rather than assuming they will always drive change in the housing market.

Altruism appeals can be effective for landlords with ethical concerns

Factor 3 landlords are particularly receptive to values-based appeals that frame housing as a community issue because of their concern about the impact of STRA on long-term housing markets.

Three LGAs in tourist areas with high concentrations of STRA had previously sent out altruism appeals. Measuring the direct impact is challenging, as properties frequently shift between short-term and long-term use. However:

- two LGAs saw a higher-than-average shift of properties back to the long-term rental market.
- one LGA reported little to no change.

These results suggest that altruism appeals may be effective—particularly with landlords already concerned about housing availability.

STRA burnout makes voluntary exit schemes more appealing to landlords

This study shows that property owners generally perceive STRA to be more work than the long-term rental market. Even with professional management, landlords still carry responsibilities. For some landlords, particularly those who do cleaning for their STRA property, the work can be unpleasant and burdensome. Workload was a commonly cited reason for leaving the STRA sector.

Landlords facing high workloads or income volatility may be receptive to voluntary exit schemes. This may include altruism appeals or incentive programs like Western Australia’s Short-term Rental Accommodation Incentive Scheme (Department of Planning, Lands and Heritage 2024), which offers STRA landlords a one-off \$10,000 payment to remove a property from the STRA market.

Final remarks

STRA can bring real benefits to local communities. It can add vibrancy to towns with a high number of vacant holiday homes, and support tourism and hospitality businesses. STRA can also cause disruptions, reduce community cohesion, and displace permanent residents.

Most STRA growth is occurring in regional tourist destinations. Understanding exactly where and how this growth is happening will be essential for designing fair, effective regulation that balances economic benefits with housing needs.

The effects of STRA are unevenly distributed throughout Australia because it is concentrated in LGAs that are attractive to tourists, and in specific neighbourhoods within those LGAs. This localised impact makes it essential for policy makers to have access to reliable longitudinal data to monitor STRA trends and manage them in ways that best serve their communities.

This study has provided detail on the current STRA sector. It has examined recent growth patterns in STRA and profiled types of STRA landlords. The data landscape remains incomplete, however, and further policy development-focused research is needed. Priority areas include:

- Conducting evidence-based reviews of STRA markets to identify:
 - where STRA is influencing housing affordability and availability
 - where STRA is contributing to tourism and local economic activity
 - where the overall impact of STRA appears minimal or neutral.
- Prioritising localised data collection to map STRA activity in more detail and understand its specific effects on housing markets.
- Developing responsive, place-based regulation informed by accurate, up-to-date evidence.

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Appendix 1: Practitioner interview guide

Changes over time

What changes have you seen in the STRA market since the advent of platforms such as Airbnb?

What changes have you seen in the STRA market as a result of the Covid-19 pandemic?

Characteristics of STRA

What STRA business model is most common in your region/among your clients? Prompt: full-time, full home vs holidays/hosted. Owners of single vs multiple STRA properties.

What kind of properties are most commonly listed? e.g. holiday house, apartment.

What is the demographic profile of people who stay in STRA in your region?

What is the demographic profile of people who own STRA properties?

Challenges

Do STRA properties cause particular challenges in your region (local government interviews only)? Are different challenges associated with different STRA business models?

Thinking about properties that are listed full-time on the STRA market, what were those properties used for before STRA?

Thinking about STRA and housing markets, who is impacted? What comes to mind when you think about STRA and that group?

Regulation

What state and local laws regulate STRA in your region? (prompts: register, fees, taxes)

How have property owners responded to those laws?

Appendix 2: Property types, 2019

Figure A1: Property types, 2019

	Freq.	%	Valid	Cum.	Labelling 1 = residential, 0 = other
1 Aparthotel	107	0.07	0.07	0.07	0
2 Apartment	57,926	36.26	36.26	36.33	1
3 Barn	107	0.07	0.07	36.4	0
4 Bed and breakfast	3,600	2.25	2.25	38.65	0
5 Boat	100	0.06	0.06	38.71	0
6 Boutique hotel	668	0.42	0.42	39.13	0
7 Bungalow	1748	1.09	1.09	40.23	1
8 Bus	11	0.01	0.01	40.23	0
9 Cabin	1,841	1.15	1.15	41.39	0
10 Camper/RV	272	0.17	0.17	41.56	0
11 Campsite	86	0.05	0.05	41.61	0
12 Casa particular (Cuba)	15	0.01	0.01	41.62	0
13 Castle	29	0.02	0.02	41.64	0
14 Cave	13	0.01	0.01	41.64	0
15 Chalet	661	0.41	0.41	42.06	0
16 Condominium	2,712	1.7	1.7	43.76	1
17 Cottage	3,948	2.47	2.47	46.23	1
18 Dome house	21	0.01	0.01	46.24	0
19 Dorm	1	0	0	46.24	0
20 Earth house	155	0.1	0.1	46.34	0
21 Farm stay	1,574	0.99	0.99	47.32	0
22 Guest suite	4,446	2.78	2.78	50.11	0
23 Guesthouse	3,541	2.22	2.22	52.32	0
24 Heritage hotel (India)	5	0	0	52.33	0
25 Hostel	444	0.28	0.28	52.61	0
26 Hotel	380	0.24	0.24	52.84	0
27 House	61,078	38.24	38.24	91.08	1
28 Houseboat	19	0.01	0.01	91.09	0

Figure A1 (continued): Property types, 2019

	Freq.	%	Valid	Cum.	Labelling 1 = residential, 0 = other
29 Hut	71	0.04	0.04	91.14	0
30 Igloo	2	0	0	91.14	0
31 Island	23	0.01	0.01	91.15	0
32 Loft	768	0.48	0.48	91.63	0
33 Minsu (Taiwan)	2	0	0	91.63	0
34 Nature lodge	242	0.15	0.15	91.78	0
35 Other	643	0.4	0.4	92.19	0
36 Resort	158	0.1	0.1	92.29	0
37 Serviced apartment	1,743	1.09	1.09	93.38	0
38 Tent	241	0.15	0.15	93.53	0
39 Tiny house	277	0.17	0.17	93.7	0
40 Tipi	28	0.02	0.02	93.72	0
41 Townhouse	7,003	4.38	4.38	98.1	1
42 Train	43	0.03	0.03	98.13	0
43 Treehouse	57	0.04	0.04	98.17	0
44 Vacation home	10	0.01	0.01	98.17	0
45 Villa	2,891	1.81	1.81	99.98	0
46 Yurt	29	0.02	0.02	100	0
Total	15,9739	100	100		

Source: Data from Inside Airbnb.

Appendix 3: Property types, 2023

Figure A2: Property types, 2023

	Freq.	%	Valid	Cum.	Labelling 1= residential, 0=other
1 Barn	174	0.12	0.12	0.12	0
2 Boat	46	0.03	0.03	0.15	0
3 Bus	30	0.02	0.02	0.17	0
4 Camper/RV	243	0.16	0.16	0.33	0
5 Campsite	128	0.08	0.08	0.41	0
6 Casa particular	10	0.01	0.01	0.42	0
7 Castle	27	0.02	0.02	0.44	0
8 Cave	9	0.01	0.01	0.44	0
9 Dome	55	0.04	0.04	0.48	0
10 Earthen home	118	0.08	0.08	0.56	0
11 Entire bed and breakfast	36	0.02	0.02	0.58	0
12 Entire bungalow	788	0.52	0.52	1.1	1
13 Entire cabin	1,559	1.03	1.03	2.14	0
14 Entire chalet	599	0.4	0.4	2.54	0
15 Entire condo	2,612	1.73	1.73	4.27	1
16 Entire cottage	5,419	3.6	3.6	7.87	1
17 Entire guest suite	5,220	3.47	3.47	11.33	0
18 Entire guesthouse	4,967	3.3	3.3	14.63	0
19 Entire home	50,010	33.2	33.2	47.83	1
20 Entire home/apartment	9	0.01	0.01	47.83	1
21 Entire loft	455	0.3	0.3	48.13	0
22 Entire place	338	0.22	0.22	48.36	1
23 Entire rental unit	39,240	26.05	26.05	74.41	1
24 Entire resort	3	0	0	74.41	0
25 Entire serviced apartment	2,144	1.42	1.42	75.83	0
26 Entire townhouse	3,882	2.58	2.58	78.41	1
27 Entire vacation home	1,893	1.26	1.26	79.66	0
28 Entire villa	2,239	1.49	1.49	81.15	0

Figure A2 (continued): Property types, 2023

	Freq.	%	Valid	Cum.	Labelling 1= residential, 0=other
29 Farm stay	2,295	1.52	1.52	82.67	0
30 Floor	3	0	0	82.68	0
31 Holiday park	114	0.08	0.08	82.75	0
32 Houseboat	27	0.02	0.02	82.77	0
33 Hut	58	0.04	0.04	82.81	0
34 Ice dome	2	0	0	82.81	0
35 Island	17	0.01	0.01	82.82	0
36 Lighthouse	2	0	0	82.82	0
37 Nature lodge	3	0	0	82.82	0
38 Private room	164	0.11	0.11	82.93	1
39 Private room in barn	9	0.01	0.01	82.94	0
40 Private room in bed and breakfast	1,380	0.92	0.92	83.86	0
41 Private room in boat	14	0.01	0.01	83.86	0
42 Private room in bungalow	164	0.11	0.11	83.97	1
43 Private room in cabin	61	0.04	0.04	84.01	0
44 Private room in camper/RV	21	0.01	0.01	84.03	0
45 Private room in casa particular	44	0.03	0.03	84.06	0
46 Private room in castle	7	0	0	84.06	0
47 Private room in chalet	55	0.04	0.04	84.1	0
48 Private room in condo	475	0.32	0.32	84.41	1
49 Private room in cottage	131	0.09	0.09	84.5	1
50 Private room in dome	2	0	0	84.5	0
51 Private room in earthen home	23	0.02	0.02	84.52	0
52 Private room in farm stay	437	0.29	0.29	84.81	0
53 Private room in guest suite	885	0.59	0.59	85.39	0
54 Private room in guesthouse	380	0.25	0.25	85.65	0
55 Private room in holiday park	9	0.01	0.01	85.65	0
56 Private room in home	9,281	6.16	6.16	91.81	1
57 Private room in hostel	185	0.12	0.12	91.94	0
58 Private room in hut	4	0	0	91.94	0
59 Private room in in-law (self contained but shared outdoor area)	1	0	0	91.94	0
60 Private room on island	2	0	0	91.94	0

Figure A2 (continued): Property types, 2023

	Freq.	%	Valid	Cum.	Labelling 1= residential, 0=other
61 Private room in loft	66	0.04	0.04	91.98	0
62 Private room in minsu	2	0	0	91.99	0
63 Private room in nature lodge	91	0.06	0.06	92.05	0
64 Private room in ranch	5	0	0	92.05	0
65 Private room in religious building	3	0	0	92.05	0
66 Private room in rental unit	5,489	3.64	3.64	95.7	1
67 Private room in resort	114	0.08	0.08	95.77	0
68 Private room in riad	9	0.01	0.01	95.78	0
69 Private room in serviced apartment	151	0.1	0.1	95.88	0
70 Private room in shepherd's hut	1	0	0	95.88	0
71 Private room in shipping container	1	0	0	95.88	0
72 Private room in tent	112	0.07	0.07	95.95	0
73 Private room in tiny home	30	0.02	0.02	95.97	0
74 Private room in tipi	10	0.01	0.01	95.98	0
75 Private room in townhouse	1179	0.78	0.78	96.76	1
76 Private room in train	5	0	0	96.77	0
77 Private room in treehouse	11	0.01	0.01	96.77	0
78 Private room in vacation home	62	0.04	0.04	96.81	0
79 Private room in villa	356	0.24	0.24	97.05	0
80 Private room in yurt	9	0.01	0.01	97.06	0
81 Ranch	55	0.04	0.04	97.09	0
82 Religious building	18	0.01	0.01	97.1	0
83 Riad	2	0	0	97.11	0
84 Room in aparthotel	235	0.16	0.16	97.26	0
85 Room in bed and breakfast	139	0.09	0.09	97.35	0
86 Room in boutique hotel	972	0.65	0.65	98	0
87 Room in heritage hotel	10	0.01	0.01	98.01	0
88 Room in hostel	67	0.04	0.04	98.05	0
89 Room in hotel	952	0.63	0.63	98.68	0
90 Room in nature lodge	14	0.01	0.01	98.69	0
91 Room in resort	43	0.03	0.03	98.72	0
92 Room in serviced apartment	171	0.11	0.11	98.83	0
93 Shared room	4	0	0	98.84	1

Figure A2 (continued): Property types, 2023

	Freq.	%	Valid	Cum.	Labelling 1= residential, 0=other
94 Shared room in barn	3	0	0	98.84	0
95 Shared room in bed and breakfast	17	0.01	0.01	98.85	0
96 Shared room in boutique hotel	3	0	0	98.85	0
97 Shared room in bungalow	3	0	0	98.85	1
98 Shared room in cabin	2	0	0	98.85	0
99 Shared room in camper/RV	3	0	0	98.86	0
100 Shared room in campsite	1	0	0	98.86	0
101 Shared room in cave	1	0	0	98.86	0
102 Shared room in chalet	3	0	0	98.86	0
103 Shared room in condo	17	0.01	0.01	98.87	1
104 Shared room in cottage	1	0	0	98.87	1
105 Shared room in earthen home	2	0	0	98.87	0
106 Shared room in farm stay	6	0	0	98.88	0
107 Shared room in guest suite	4	0	0	98.88	0
108 Shared room in guesthouse	18	0.01	0.01	98.89	0
109 Shared room in home	167	0.11	0.11	99	1
110 Shared room in hostel	101	0.07	0.07	99.07	0
111 Shared room in hotel	13	0.01	0.01	99.08	0
112 Shared room in hut	3	0	0	99.08	0
113 Shared room in loft	1	0	0	99.08	0
114 Shared room in nature lodge	1	0	0	99.08	0
115 Shared room in rental unit	305	0.2	0.2	99.28	1
116 Shared room in resort	1	0	0	99.29	0
117 Shared room in serviced apartment	4	0	0	99.29	0
118 Shared room in tent	2	0	0	99.29	0
119 Shared room in tipi	1	0	0	99.29	0
120 Shared room in townhouse	15	0.01	0.01	99.3	1
121 Shared room in vacation home	2	0	0	99.3	0
122 Shared room in villa	5	0	0	99.3	0
123 Shepherd's hut	5	0	0	99.31	0
124 Shipping container	22	0.01	0.01	99.32	0
125 Tent	186	0.12	0.12	99.45	0

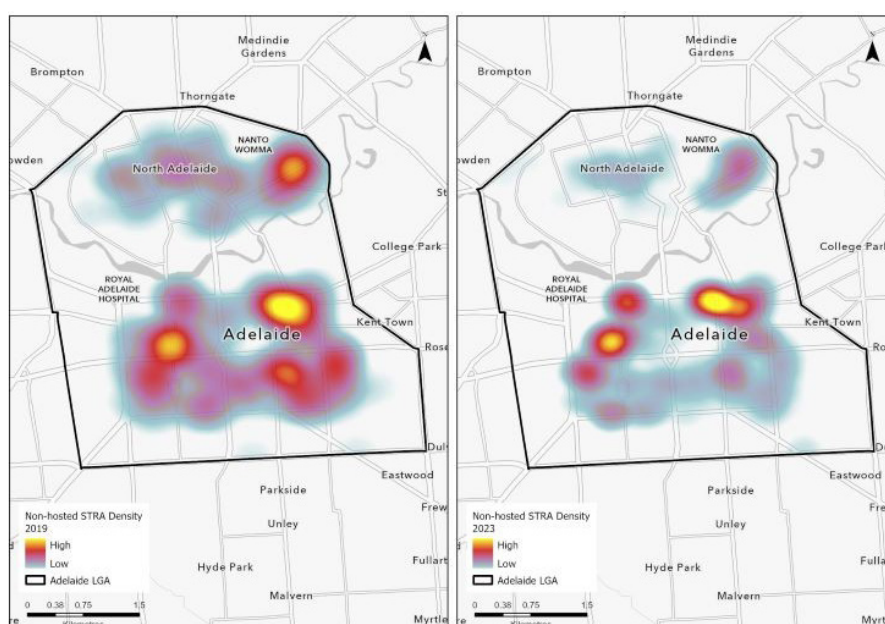
Figure A2 (continued): Property types, 2023

	Freq.	%	Valid	Cum.	Labelling 1= residential, 0=other
126 Tiny home	683	0.45	0.45	99.9	0
127 Tipi	24	0.02	0.02	99.92	0
128 Tower	2	0	0	99.92	0
129 Train	42	0.03	0.03	99.94	0
130 Treehouse	41	0.03	0.03	99.97	0
131 Yurt	43	0.03	0.03	100	0
Total	150,649	100	100		

Source: Data from Inside Airbnb.

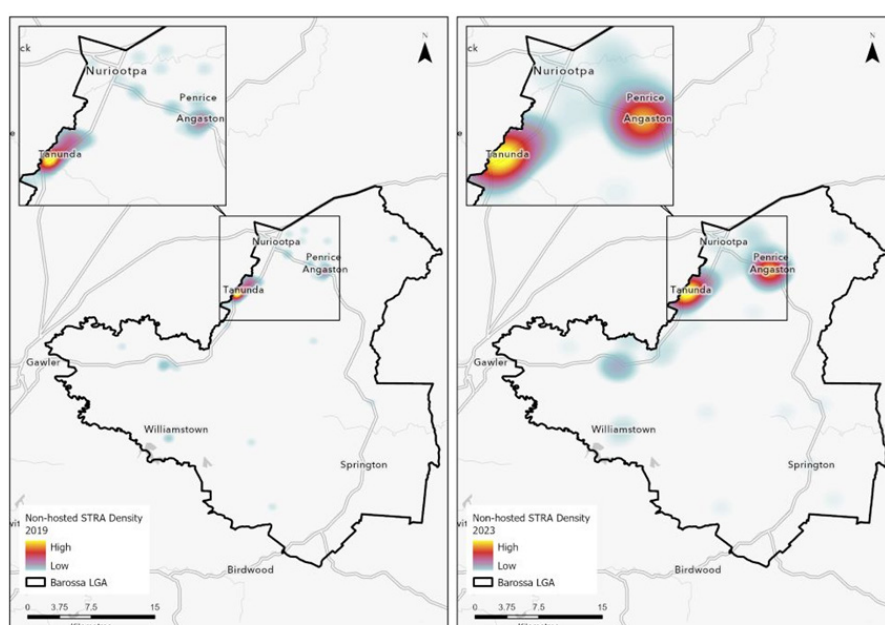
Appendix 4: STRA density maps, South Australia

Figure A3: Adelaide STRA densities, 2019 and 2023



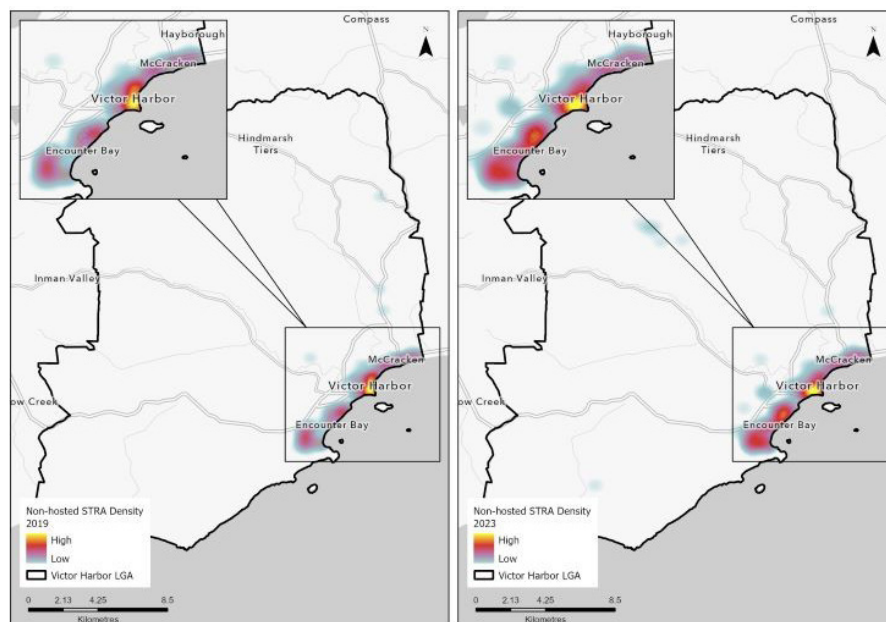
Source: Authors, based on Inside Airbnb 2019 and 2023 data, 2021 ABS ASGS LGA Boundaries, and Esri.

Figure A4: The Barossa STRA densities, 2019 and 2023



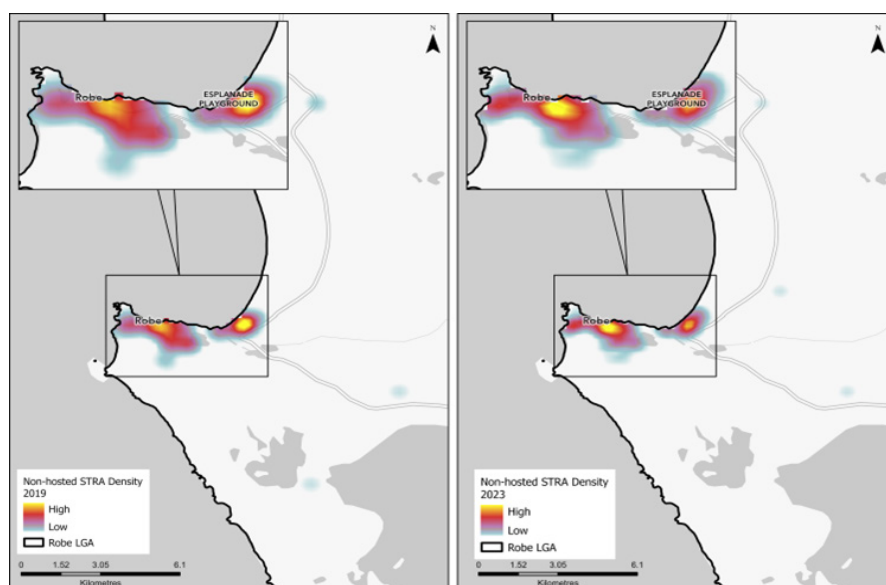
Source: Authors, based on Inside Airbnb 2019 and 2023 data, 2021 ABS ASGS LGA Boundaries, and Esri.

Figure A5: Victor Harbor STRA densities, 2019 and 2023



Source: Authors, based on Inside Airbnb 2019 and 2023 data, 2021 ABS ASGS LGA Boundaries, and Esri.

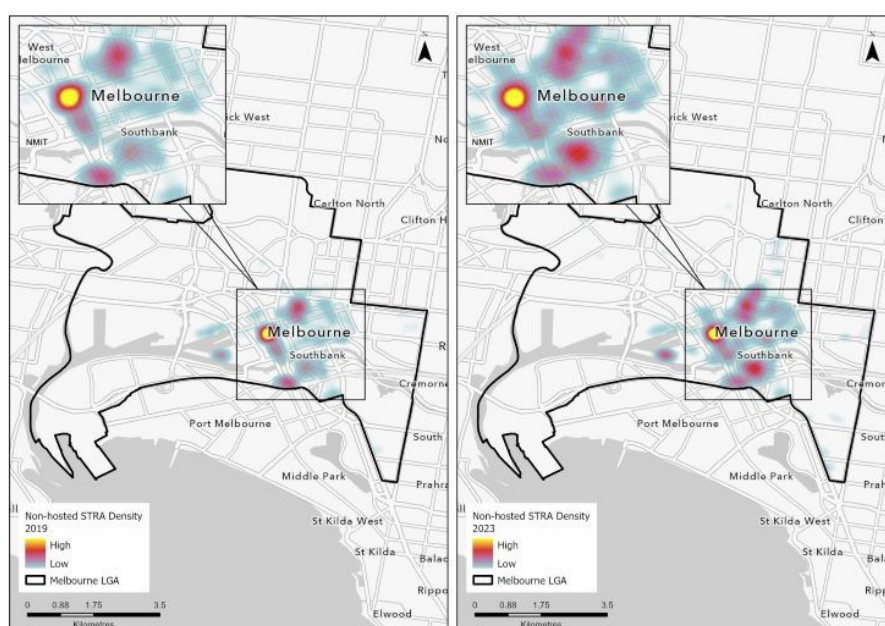
Figure A6: Robe STRA densities, 2019 and 2023



Source: Authors, based on Inside Airbnb 2019 and 2023 data, 2021 ABS ASGS LGA Boundaries, and Esri.

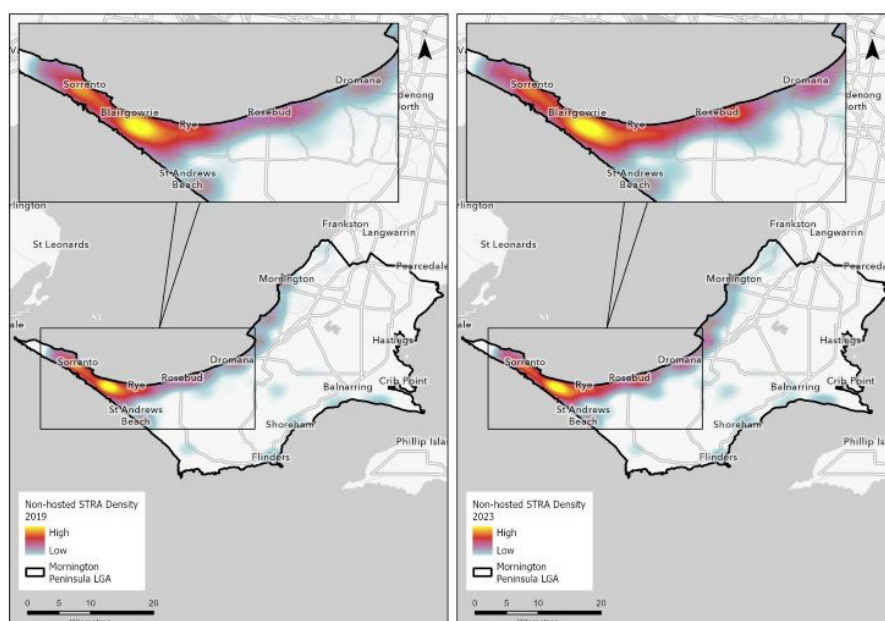
Appendix 5: STRA density maps, Victoria

Figure A7: Melbourne STRA densities, 2019 and 2023



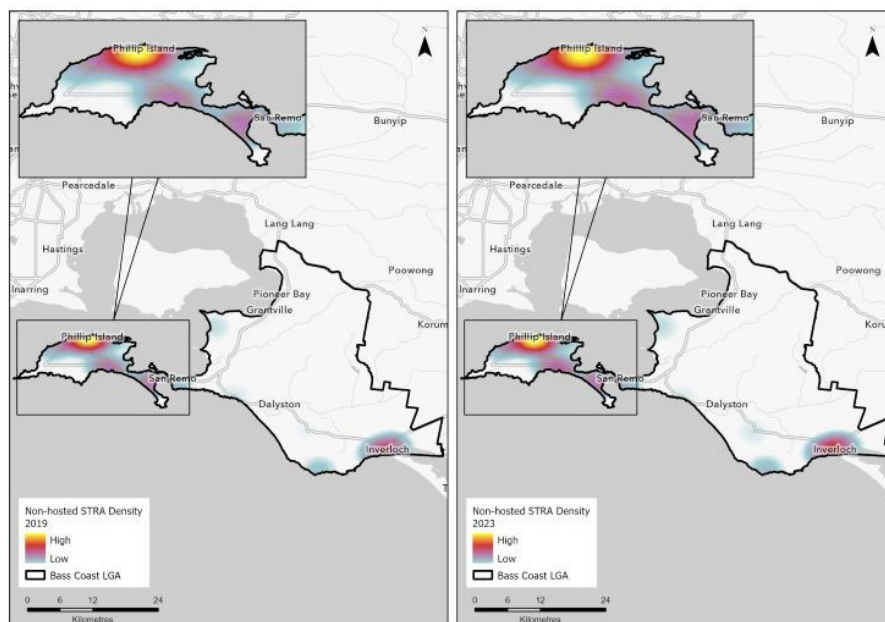
Source: Authors, based on Inside Airbnb 2019 and 2023 data, 2021 ABS ASGS LGA Boundaries, and Esri.

Figure A8: Mornington Peninsula STRA densities, 2019 and 2023



Source: Authors, based on Inside Airbnb 2019 and 2023 data, 2021 ABS ASGS LGA Boundaries, and Esri.

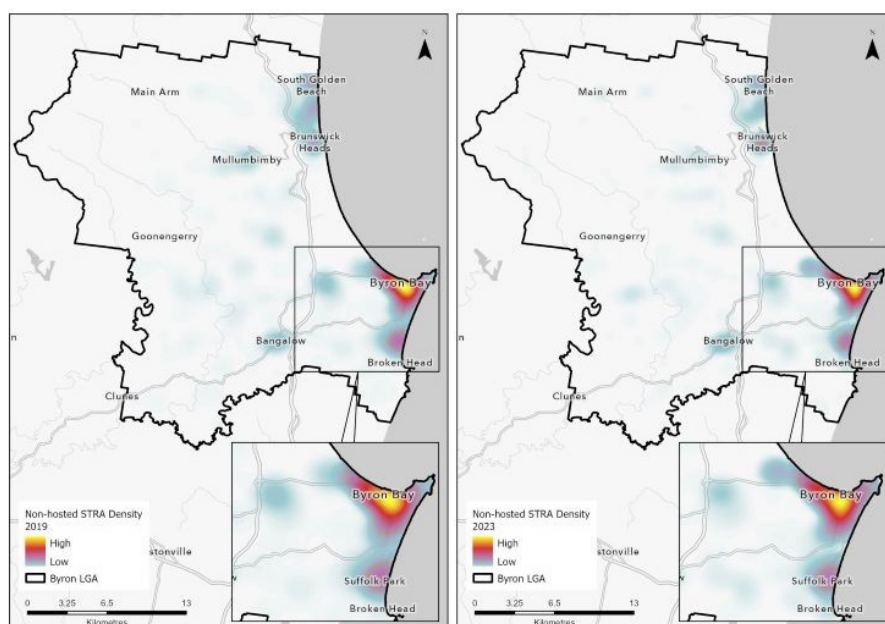
Figure A9: Bass Coast STRA densities, 2019 and 2023



Source: Authors, based on Inside Airbnb 2019 and 2023 data, 2021 ABS ASGS LGA Boundaries, and Esri.

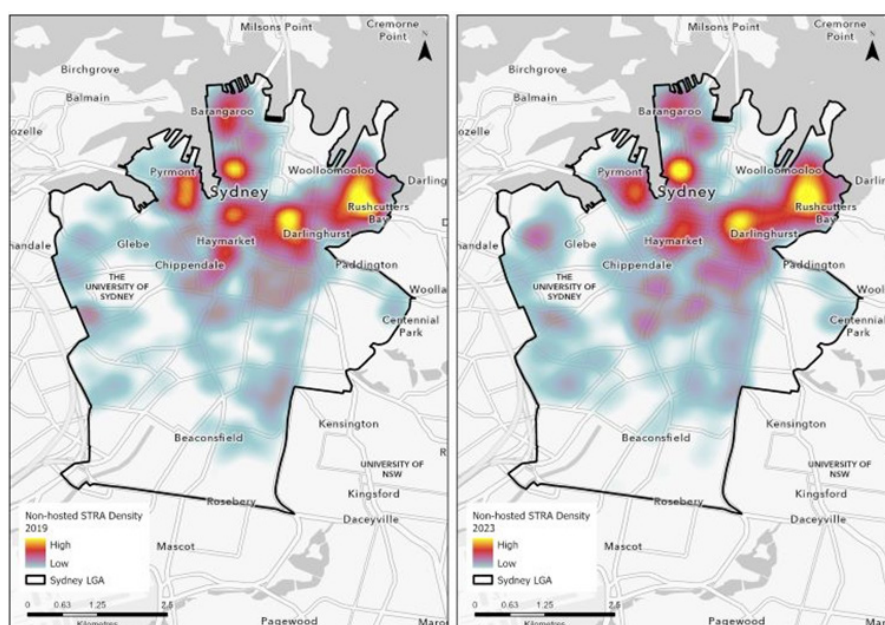
Appendix 6: STRA density maps, New South Wales

Figure A10: Byron STRA densities, 2019 and 2023



Source: Authors, based on Inside Airbnb 2019 and 2023 data, 2021 ABS ASGS LGA Boundaries, and Esri.

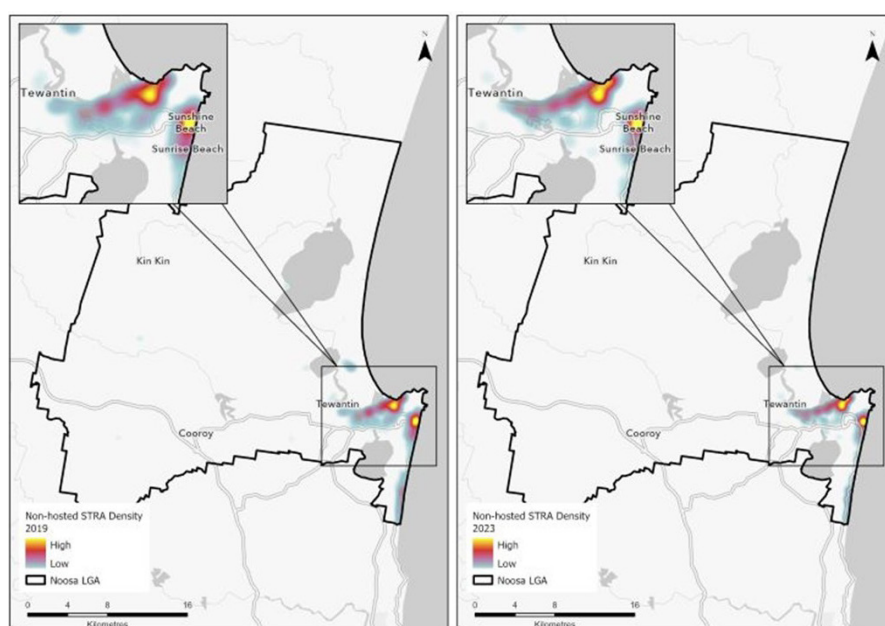
Figure A11: Sydney STRA densities, 2019 and 2023



Source: Authors, based on Inside Airbnb 2019 and 2023 data, 2021 ABS ASGS LGA Boundaries, and Esri.

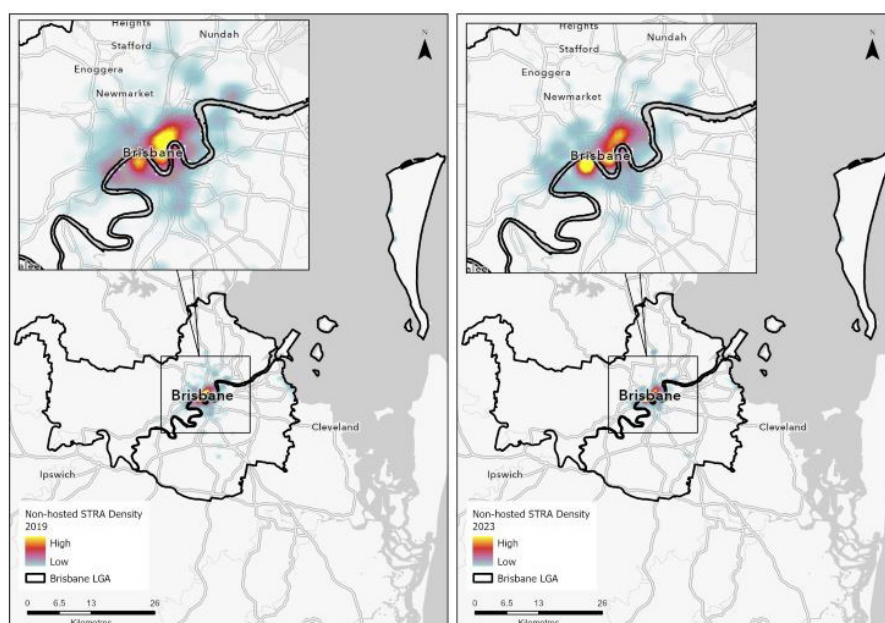
Appendix 7: STRA density maps, Queensland

Figure A12: Noosa STRA densities, 2019 and 2023



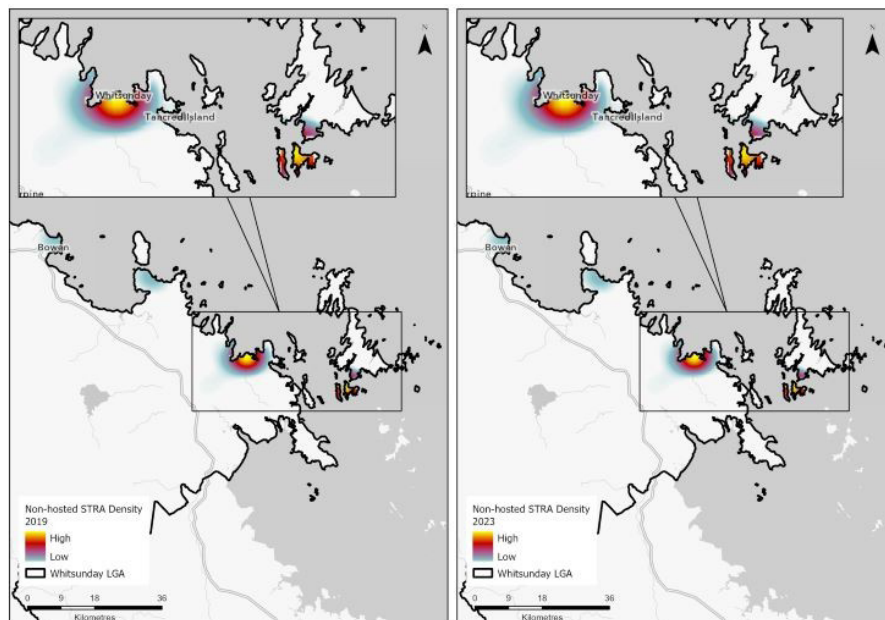
Source: Authors, based on Inside Airbnb 2019 and 2023 data, 2021 ABS ASGS LGA Boundaries, and Esri.

Figure A13: Brisbane STRA densities, 2019 and 2023



Source: Authors, based on Inside Airbnb 2019 and 2023 data, 2021 ABS ASGS LGA Boundaries, and Esri.

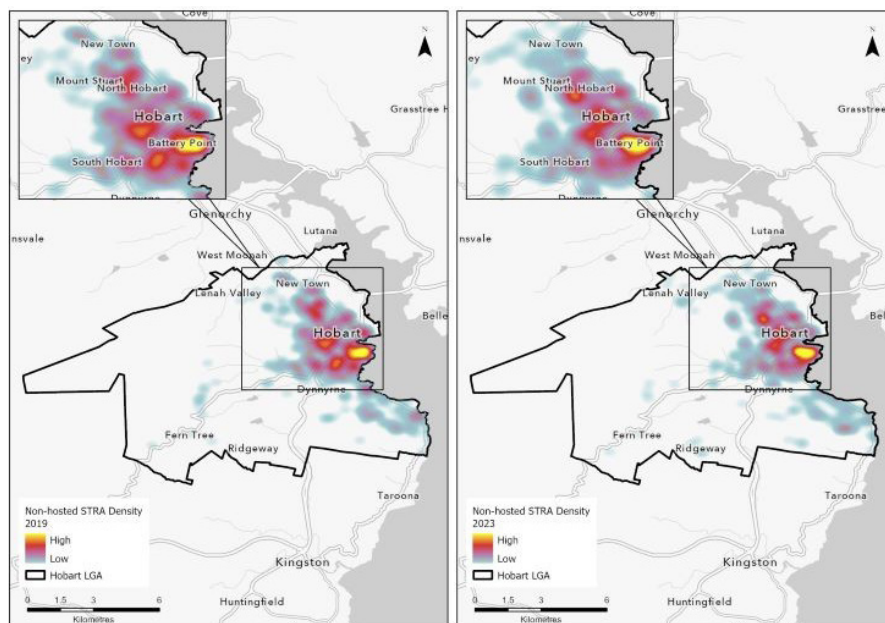
Figure A14: Whitsunday STRA densities, 2019 and 2023



Source: Authors, based on Inside Airbnb 2019 and 2023 data, 2021 ABS ASGS LGA Boundaries, and Esri.

Appendix 8: STRA density map, Hobart

Figure A15: Hobart STRA densities, 2019 and 2023



Source: Authors, based on Inside Airbnb 2019 and 2023 data, 2021 ABS ASGS LGA Boundaries, and Esri.

Appendix 9: Q-sort statements

1. STRA gives me work that can fit in around caring responsibilities.
2. STRA has allowed me to start a business.
3. There are more opportunities to keep an eye on the property if it is rented as STRA.
4. Tenants in long-term rental have greater rights/powers over my property than in STRA.
5. STRA helps to cover the costs of owning/renting the home that I live in (e.g. mortgage, rent, renovations).
6. STRA helps me to afford the rising cost of living.
7. STRA helps with the ongoing costs of having an investment property (e.g. mortgage, rates, maintenance, renovations).
8. Income from STRA has peaks and troughs.
9. STRA is less profitable when more people are doing it.
10. It is difficult to get reimbursed if STRA guests cause damage.
11. STRA makes more money than long-term rentals.
12. STRA is a way to meet new people.
13. STRA has become more professional and less friendly.
14. I enjoy making STRA guests happy.
15. STRA gives me flexibility to use my property when and how I want to.
16. STRA means that I can use the property in future if my needs change.
17. Before STRA, my property was not fully utilised (e.g. holiday house).
18. My STRA property is convenient for my job sometimes.
19. There is a lot of administration in running a STRA property.
20. The work required to keep a STRA property clean and appealing can be unpleasant.
21. Managing a STRA is hard work.
22. Guests expect STRA properties to be as professional as hotels these days.
23. Managing reviews can be stressful.
24. STRA is a way to learn about other cultures.
25. STRA is a way to share my culture with others.
26. STRA allows me to give others the same opportunities I have had when travelling.
27. STRA platforms provide hosts with positive feedback.
28. Taxes drive up the price of owning an investment property.
29. There are more costs with STRA than with long-term rental.
30. STRA causes more wear and tear than long-term rentals.
31. Online payments for STRA are a risk for property owners.
32. Hosting people with different political backgrounds can be a challenge for STRA owners.
33. Putting a property onto STRA means that it is no longer a private space.
34. I have worried about my safety around STRA guests.
35. STRA guests can cause problems by staying past check-out time.
36. The public perception is that all STRA owners are rich.

Source: Authors.

Appendix 10: Consensus statements

Consensus statements do not distinguish between any pair of factors.

All listed statements are non-significant at $p < 0.01$, and those flagged with an * are also non-significant at $p < 0.05$.

Statement	F1	F2	F2b	F3
STRA helps with the ongoing costs of having an investment property (e.g. mortgage, rates, maintenance, renovations).	3	3	3	4
STRA is a way to meet new people.	-2	0	-2	0
STRA means that I can use the property in future if my needs change.	2	0	1	2
Hosting people with different political backgrounds can be a challenge for STRA owners.*	-4	-4	-2	-4
STRA guests can cause problems by staying past check-out time.	-1	-1	2	-1

Source: Authors.

Appendix 11: Composite sort Factor 1, Investment-focussed

-5	-4	-3	-2	-1	0	1	2	3	4	5
31. Online payments for STRA are a risk for property owners.	34. I have worried about my safety around STRA guests.	2. STRA has allowed me to start a business.	12. STRA is a way to meet new people.	33. Putting a property onto STRA means that it is no longer a private.	17. Before STRA my property was not fully utilised (e.g., holiday house).	4. Tenants in long-term rental have greater rights/powers.	19. There is a lot of administration in running a STRA property.	21. Managing a STRA is hard work.	28. Taxes drive up the price of owning an investment property.	15. STRA gives me flexibility to use my property when and how I want.
	32. Hosting people with different political backgrounds can be a challenge for STRA owners.	24. STRA is a way to learn about other cultures.	13. STRA has become more professional and less friendly.	5. STRA helps to cover the costs of owning/renting the home that I live in.	11. STRA makes more money than long-term rentals.	23. Managing reviews can be stressful.	16. STRA means that I can use the property in future if my needs change.	22. Guests expect STRA properties to be as professional as hotels these days.	29. There are more costs with STRA than with long-term rental.	
		25. STRA is a way to share my culture with others.	30. STRA causes more wear and tear than long-term rentals.	26. STRA allows me to give others the same opportunities I have had when travelling.	3. There are more opportunities to keep an eye on the property.	36. The public perception is that all STRA owners are rich.	8. Income from STRA has peaks and troughs.	7. STRA helps with the ongoing costs of having an investment property.		
			18. My STRA property is convenient for my job sometimes.	35. STRA guests can cause problems by staying past check-out time.	10. It is difficult to get reimbursed if STRA guests cause damage.	9. STRA is less profitable when more people are doing it.	14. I enjoy making STRA guests happy.			
				6. STRA helps me to afford the rising cost of living.	1. STRA gives me work that can fit around caring responsibilities.	27. STRA platforms provide hosts with positive feedback.				
					20. The work required to keep a STRA property clean and appealing.					

Source: Authors.

Appendix 12: Composite sort Factor 2, Social connection

-5	-4	-3	-2	-1	0	1	2	3	4	5
31. Online payments for STRA are a risk for property owners.	32. Hosting people with different political backgrounds can be a challenge for STRA owners.	20. The work required to keep a STRA property clean and appealing.	13. STRA has become more professional and less friendly.	28. Taxes drive up the price of owning an investment property.	12. STRA is a way to meet new people.	4. Tenants in long-term rental have greater rights/powers.	15. STRA gives me flexibility to use my property when and how I want.	29. There are more costs with STRA than with long-term rental.	2. STRA has allowed me to start a business.	14. I enjoy making STRA guests happy.
	21. Managing a STRA is hard work.	33. Putting a property onto STRA means that it is no longer a private.	10. It is difficult to get reimbursed if STRA guests cause damage.	17. Before STRA my property was not fully utilised (e.g., holiday house).	16. STRA means that I can use the property in future if my needs change.	25. STRA is a way to share my culture with others.	8. Income from STRA has peaks and troughs.	27. STRA platforms provide hosts with positive feedback.	3. There are more opportunities to keep an eye on the property.	
		34. I have worried about my safety around STRA guests.	9. STRA is less profitable when more people are doing it.	35. STRA guests can cause problems by staying past check-out time.	1. STRA gives me work that can fit around caring responsibilities.	36. The public perception is that all STRA owners are rich.	22. Guests expect STRA properties to be as professional as hotels these days.	7. STRA helps with the ongoing costs of having an investment property.		
			30. STRA causes more wear and tear than long-term rentals.	18. My STRA property is convenient for my job sometimes.	24. STRA is a way to learn about other cultures.	6. STRA helps me to afford the rising cost of living.	26. STRA allows me to give others the same opportunities I have had when travelling.			
				23. Managing reviews can be stressful.	5. STRA helps to cover the costs of owning/renting the home that I live in.	11. STRA makes more money than long-term rentals.				
					19. There is a lot of administration in running a STRA property.					

Source: Authors.

Appendix 13: Composite sort Factor 2b, Stressed out

-5	-4	-3	-2	-1	0	1	2	3	4	5
11. STRA makes more money than long-term rentals.	18. My STRA property is convenient for my job sometimes.	1. STRA gives me work that can fit around caring responsibilities.	32. Hosting people with different political backgrounds can be a challenge for STRA owners.	17. Before STRA my property was not fully utilised (e.g., holiday house).	2. STRA has allowed me to start a business.	8. Income from STRA has peaks and troughs.	20. The work required to keep a STRA property clean and appealing.	10. It is difficult to get reimbursed if STRA guests cause damage.	21. Managing a STRA is hard work.	28. Taxes drive up the price of owning an investment property.
	26. STRA allows me to give others the same opportunities I have had when travelling.	15. STRA gives me flexibility to use my property when and how I want.	9. STRA is less profitable when more people are doing it.	24. STRA is a way to learn about other cultures.	5. STRA helps to cover the costs of owning/renting the home that I live in.	34. I have worried about my safety around STRA guests.	31. Online payments for STRA are a risk for property owners.	19. There is a lot of administration in running a STRA property.	30. STRA causes more wear and tear than long-term rentals.	
		27. STRA platforms provide hosts with positive feedback.	12. STRA is a way to meet new people.	36. The public perception is that all STRA owners are rich.	6. STRA helps me to afford the rising cost of living.	3. There are more opportunities to keep an eye on the property.	33. Putting a property onto STRA means that it is no longer a private.	7. STRA helps with the ongoing costs of having an investment property.		
			22. Guests expect STRA properties to be as professional as hotels these days.	4. Tenants in long-term rental have greater rights/powers.	13. STRA has become more professional and less friendly.	16. STRA means that I can use the property in future if my needs change.	35. STRA guests can cause problems by staying past check-out time.			
				14. I enjoy making STRA guests happy.	25. STRA is a way to share my culture with others.	23. Managing reviews can be stressful.				
					29. There are more costs with STRA than with long-term rental.					

Source: Authors.

Appendix 14: Composite sort Factor 3, Ethical and economic

-5	-4	-3	-2	-1	0	1	2	3	4	5
34. I have worried about my safety around STRA guests.	32. Hosting people with different political backgrounds can be a challenge for STRA owners.	24. STRA is a way to learn about other cultures.	31. Online payments for STRA are a risk for property owners.	35. STRA guests can cause problems by staying past check-out time.	30. STRA causes more wear and tear than long-term rentals.	19. There is a lot of administration in running a STRA property.	21. Managing a STRA is hard work.	15. STRA gives me flexibility to use my property when and how I want.	20. The work required to keep a STRA property clean and appealing.	11. STRA makes more money than long-term rentals.
	28. Taxes drive up the price of owning an investment property.	4. Tenants in long-term rental have greater rights/powers.	36. The public perception is that all STRA owners are rich.	1. STRA gives me work that can fit around caring responsibilities.	25. STRA is a way to share my culture with others.	6. STRA helps me to afford the rising cost of living.	16. STRA means that I can use the property in future if my needs change.	5. STRA helps to cover the costs of owning/renting the home that I live in.	7. STRA helps with the ongoing costs of having an investment property.	
		33. Putting a property onto STRA means that it is no longer a private.	8. Income from STRA has peaks and troughs.	27. STRA platforms provide hosts with positive feedback.	2. STRA has allowed me to start a business.	14. I enjoy making STRA guests happy.	3. There are more opportunities to keep an eye on the property.	22. Guests expect STRA properties to be as professional as hotels these days.		
			17. Before STRA my property was not fully utilised (e.g., holiday house).	26. STRA allows me to give others the same opportunities I have had when travelling.	10. It is difficult to get reimbursed if STRA guests cause damage.	13. STRA has become more professional and less friendly.	23. Managing reviews can be stressful.			
				29. There are more costs with STRA than with long-term rental.	9. STRA is less profitable when more people are doing it.	18. My STRA property is convenient for my job sometimes.				
					12. STRA is a way to meet new people.					

Source: Authors.



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