



SAN RAFAEL

THE CITY WITH A MISSION

Short Term Rental Community Survey Findings

Short Term Rental Community Meeting
May 29 & 30, 2019

Agenda

1. Background
2. Survey Results
 - a) Overall Findings
 - b) Short Term Rental Hosts
 - c) Deep Dive
3. “Straw-man” Proposal
4. Feedback
5. Next Steps



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Background

Background

Jan. 4, 2016- Council ask Staff to begin monitoring STR activity as part of JDU ordinance review

Aug. 20, 2018- Staff provides Housing Report to City Council. Council directs staff to return with informational report on STRs.

Today- San Rafael does not prohibit, regulate, tax or enforce STRs.

June 10, 2016- Staff enters into contract with Host Compliance to provide the following STR monitoring services:

- Trend Monitoring;
- Address Identification

Feb. 19, 2019- Staff provides STR Informational Report to City Council. Council directs staff to conduct additional outreach and further analyze STRs regulation.

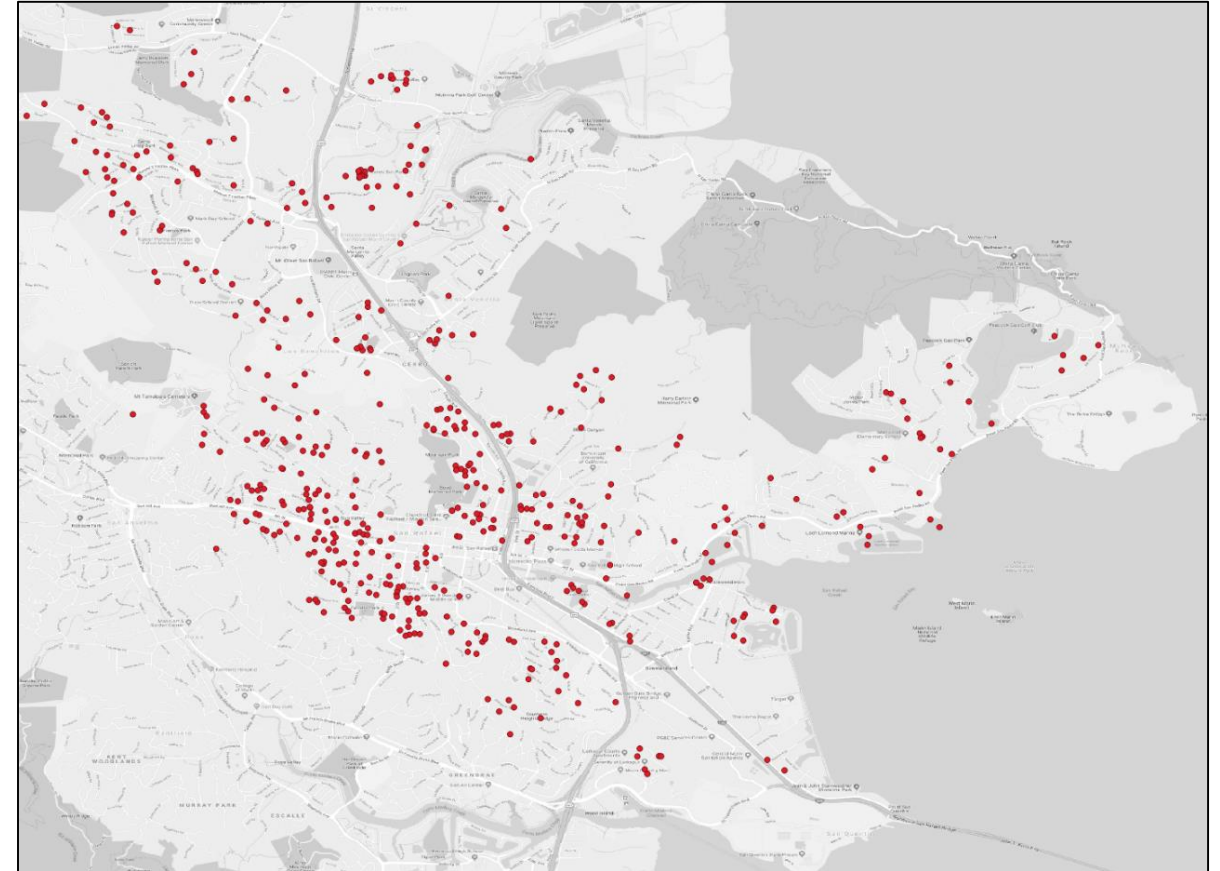


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Existing Conditions

- ~286 Active Listings in 2018:
 - Increase from 150 active listings when monitoring first began in 2016.
 - 3-Bedroom Single Family Homes are the largest “host-described” property type (75-listings);
- Distributed relatively equally geographical across city:
 - Slight concentrations in West End, Gerstle Park, and Dominican neighborhoods.
- Over the last three years, the City has received less than a dozen STR related complaints.



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2.19 Staff Report Analysis

Low Estimate									
Option	Revenue			Expenditures		Annual Balance			
	Year 1- Fees	Ongoing- Fees	TOT	Year 1	Ongoing	Year 1		Ongoing	
						With Fees Collected*	No Fees Collected (TOT Only)	With Fees Collected*	No Fees Collected (TOT Only)
1) Status Quo	\$0	\$0	\$0	\$0	\$5,130	\$0	\$0	-\$5,130	-\$5,130
2) Minimal Enforcement	\$34,907	\$26,576	\$18,051	\$34,907	\$26,576	\$18,051	-\$16,856	\$18,051	-\$8,525
3) STR Ban	\$0	\$0	\$0	\$60,835	\$46,948	-\$60,835	-\$60,835	-\$46,948	-\$46,948

Mean Estimate									
Option	Revenue			Expenditures		Annual Balance			
	Year 1- Fees	Ongoing- Fees	TOT	Year 1	Ongoing	Year 1		Ongoing	
						With Fees Collected*	No Fees Collected (TOT Only)	With Fees Collected*	No Fees Collected (TOT Only)
1) Status Quo	\$0	\$0	\$0	\$0	\$5,130	\$0	\$0	-\$5,130	-\$5,130
2) Minimal Enforcement	\$34,907	\$26,576	\$39,738	\$34,907	\$26,576	\$39,738	\$4,831	\$39,738	\$13,163
3) STR Ban	\$0	\$0	\$0	\$60,835	\$46,948	-\$60,835	-\$60,835	-\$46,948	-\$46,948

High Estimate									
Option	Revenue			Expenditures		Annual Balance			
	Year 1- Fees	Ongoing- Fees	TOT	Year 1	Ongoing	Year 1		Ongoing	
						With Fees Collected*	No Fees Collected (TOT Only)	With Fees Collected*	No Fees Collected (TOT Only)
1) Status Quo	\$0	\$0	\$0	\$0	\$5,130	\$0	\$0	-\$5,130	-\$5,130
2) Minimal Enforcement	\$34,907	\$26,576	\$105,183	\$34,907	\$26,576	\$105,183	\$70,276	\$105,183	\$78,608
3) STR Ban	\$0	\$0	\$0	\$60,835	\$46,948	-\$60,835	-\$60,835	-\$46,948	-\$46,948

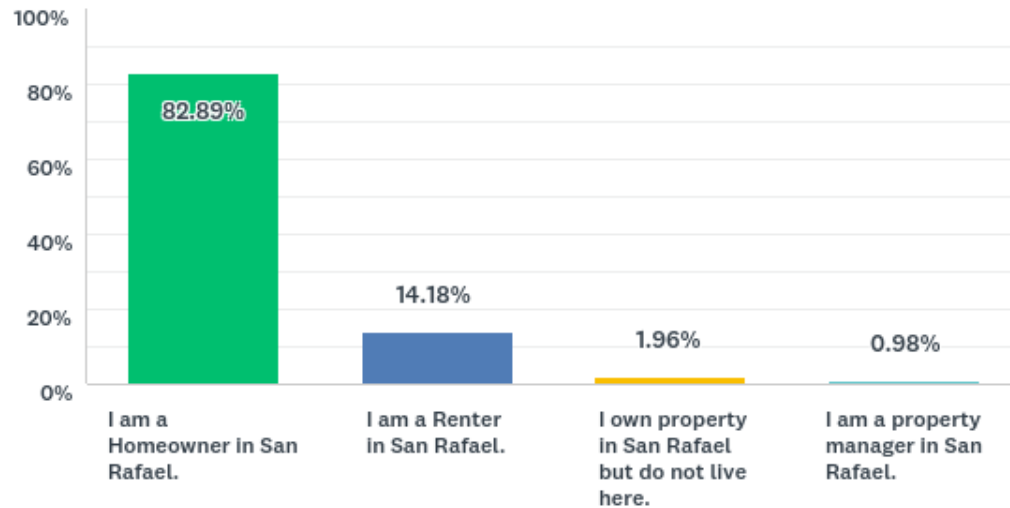
* Program fees are calculated as cost-recovering for program expenses. If fees are collected, Year 1 and Ongoing program balances would be the same as they reflect the TOT Revenue collected that year.

Community Survey: Overall Findings

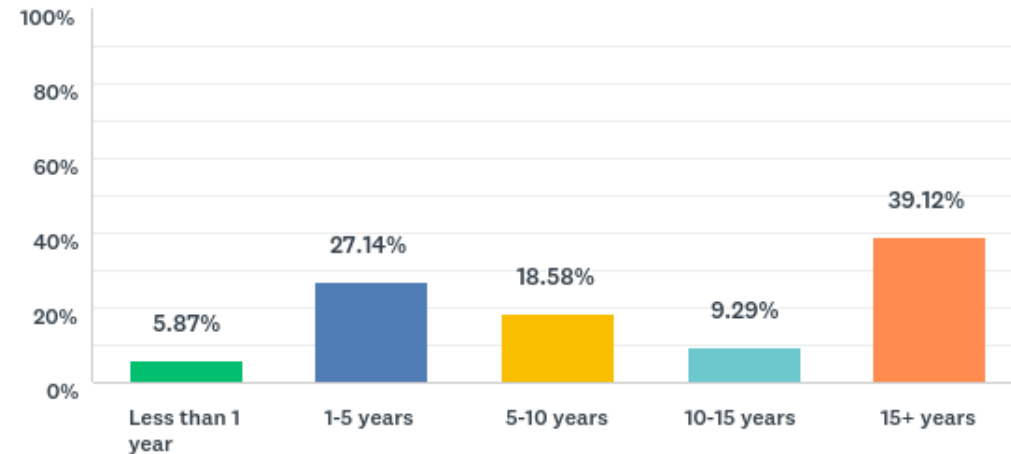
Who took the survey?

Answered: 409 Skipped: 0

Q1 Which option best describes you?



Q2 How long have you lived in your current home?

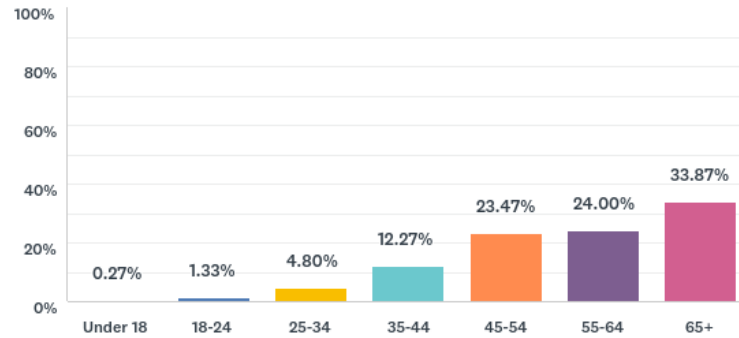


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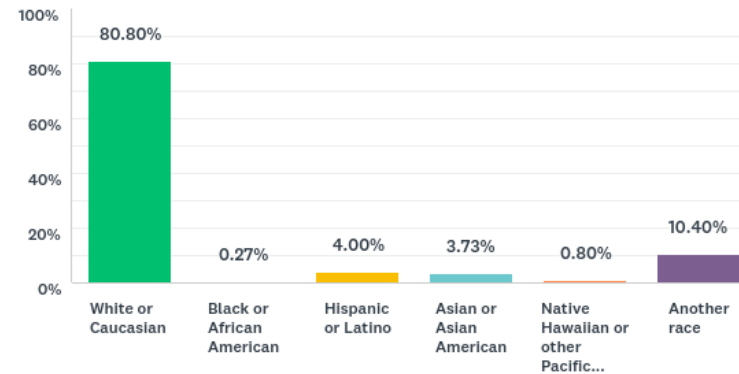
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Who took the survey?

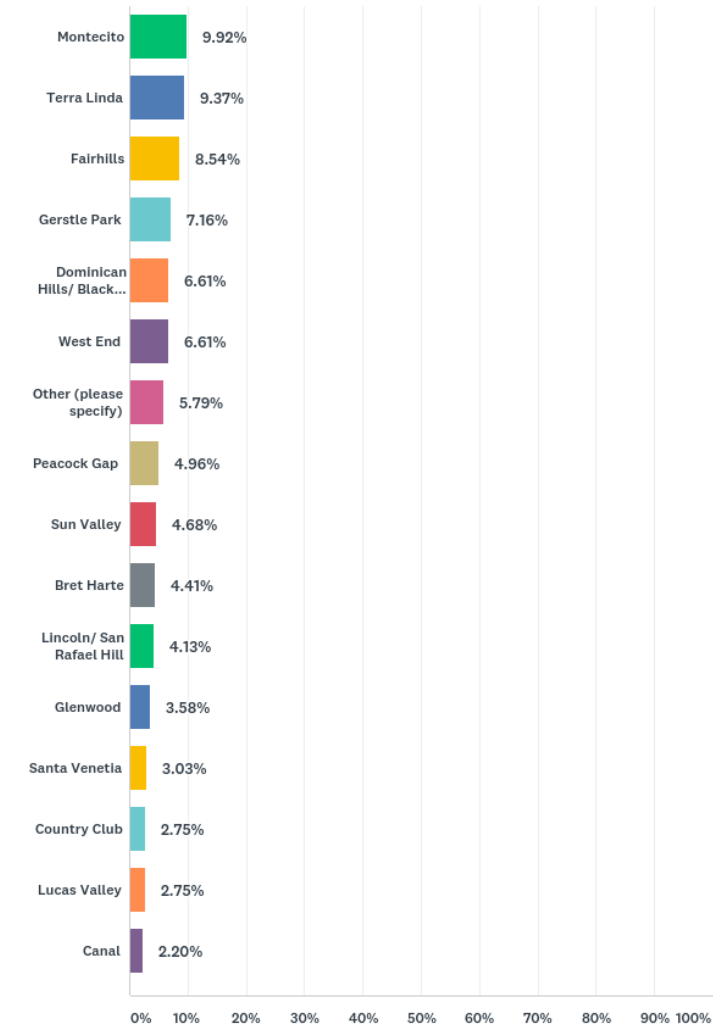
Q21 What is your age?



Q20 What is your race?



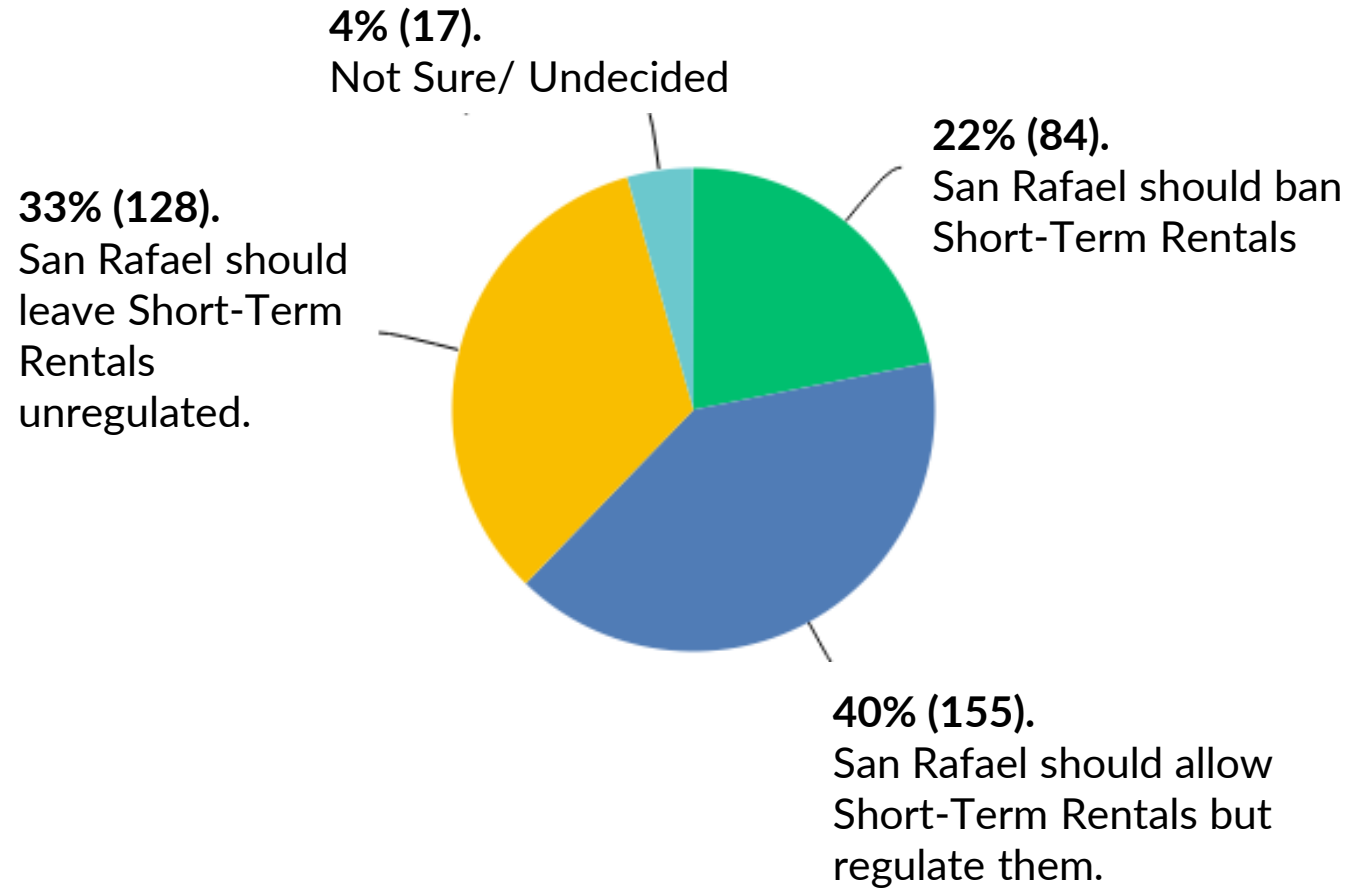
Q23 If yes, which San Rafael neighborhood do you live in?



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Overall Findings

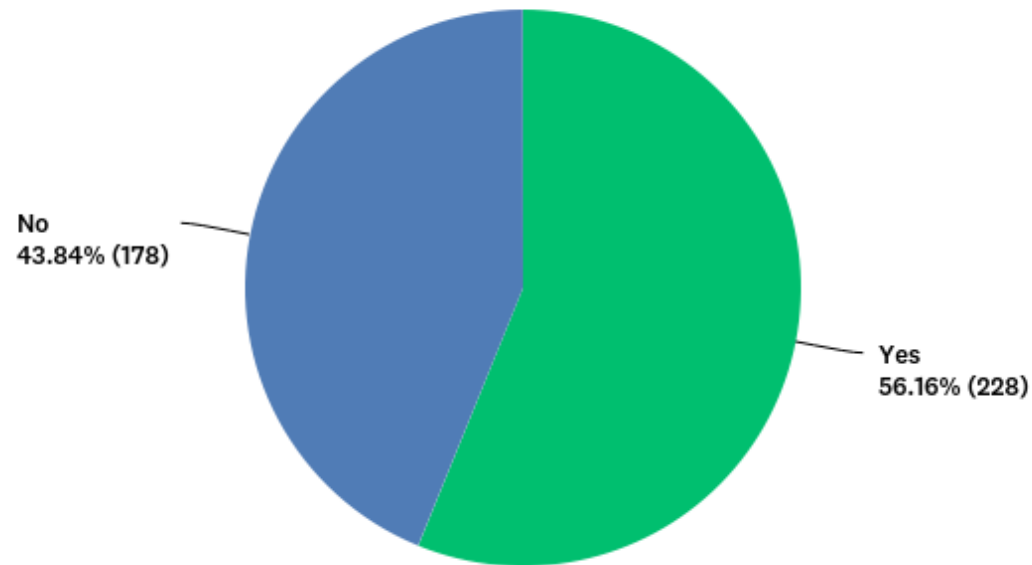


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Overall Findings

Are you aware of any Short-Term Rentals in your neighborhood?

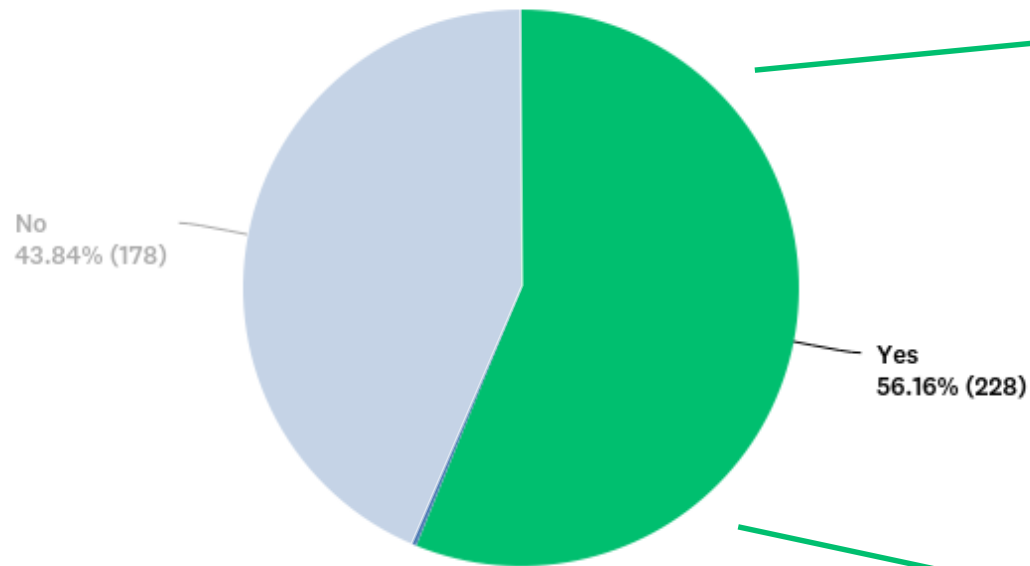


Short Term Rental Community Meeting

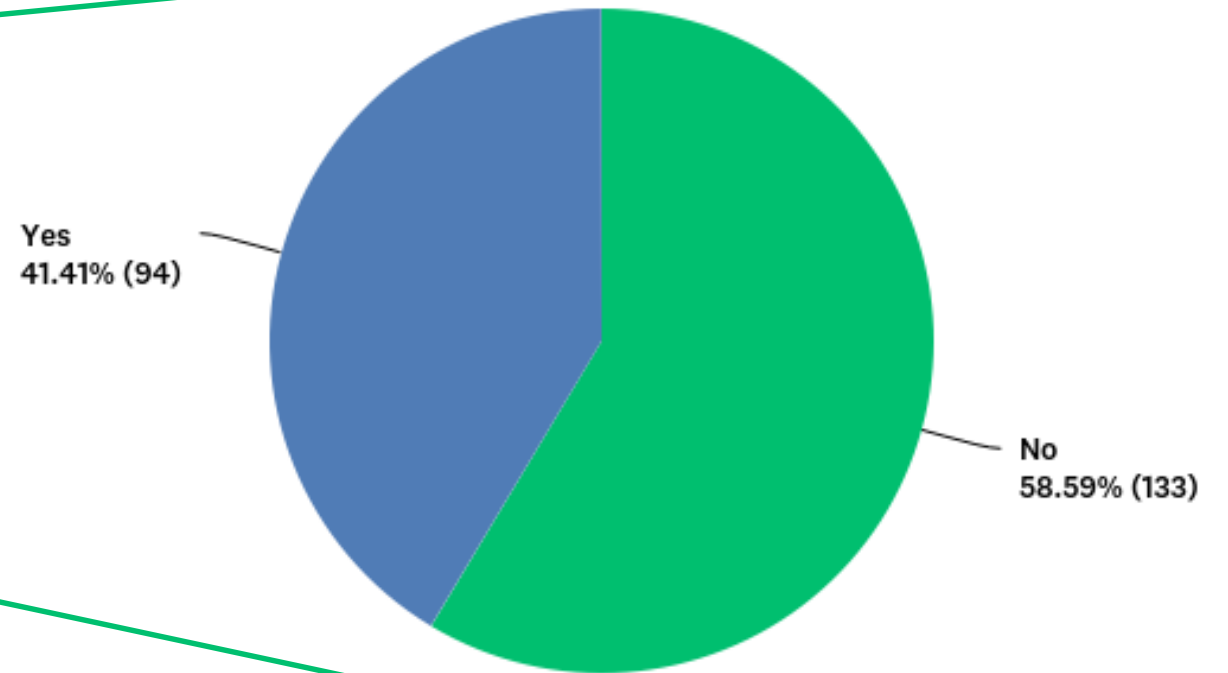
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Overall Findings

Are you aware of any Short-Term Rentals in your neighborhood?



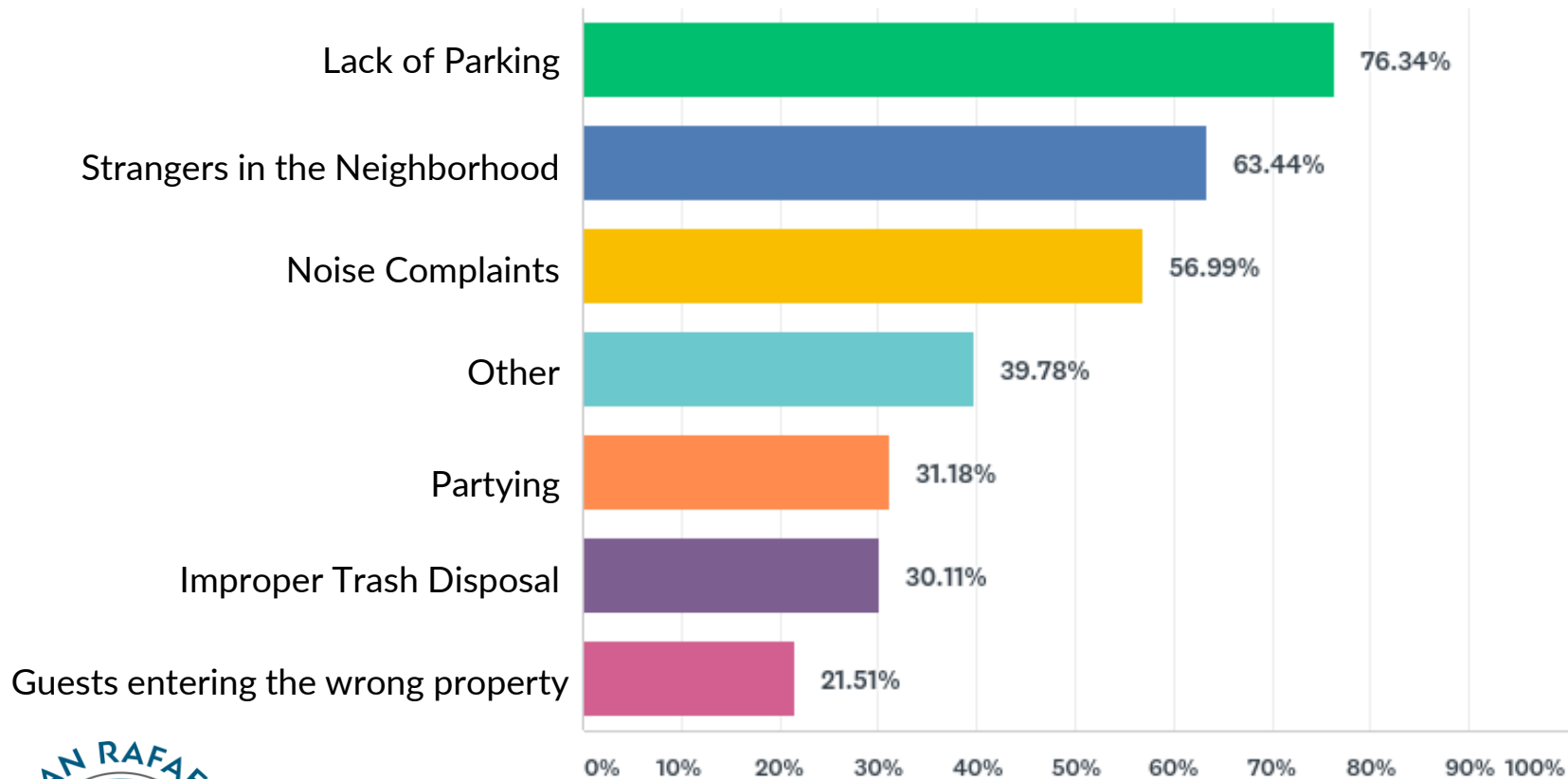
If yes, have the Short-Term Rentals caused any problems?



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Overall Findings



If yes, please choose the option(s) below that best describes the problem.



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Overall Findings

How concerned are you about the following challenges related to Short-Term Rentals?

Impacts on Neighborhood Character

Party Houses

Parking

Noise

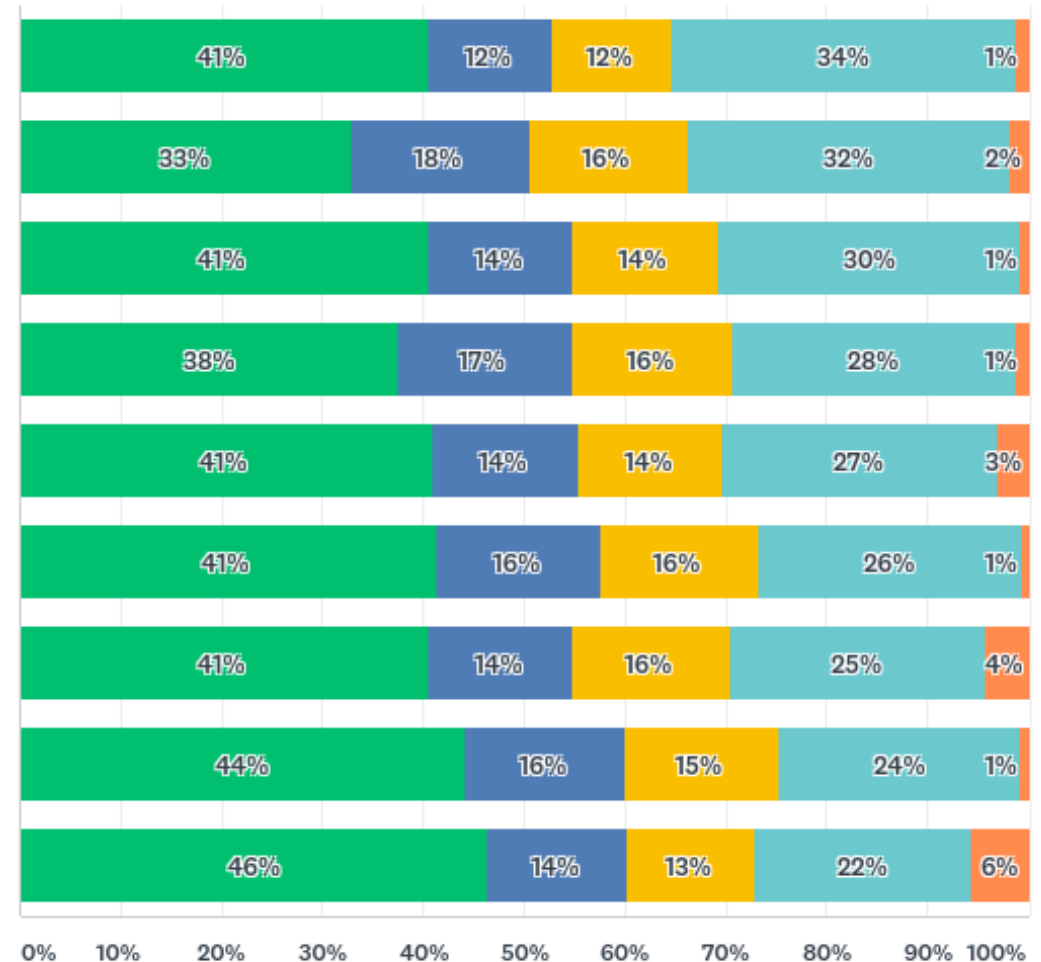
Loss of Long-Term Housing

Strangers in the Neighborhood

Resident Displacement

Personal Security

Increases in Housing Prices



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Overall Findings

How concerned are you about the following challenges related to Short-Term Rentals?

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Noise

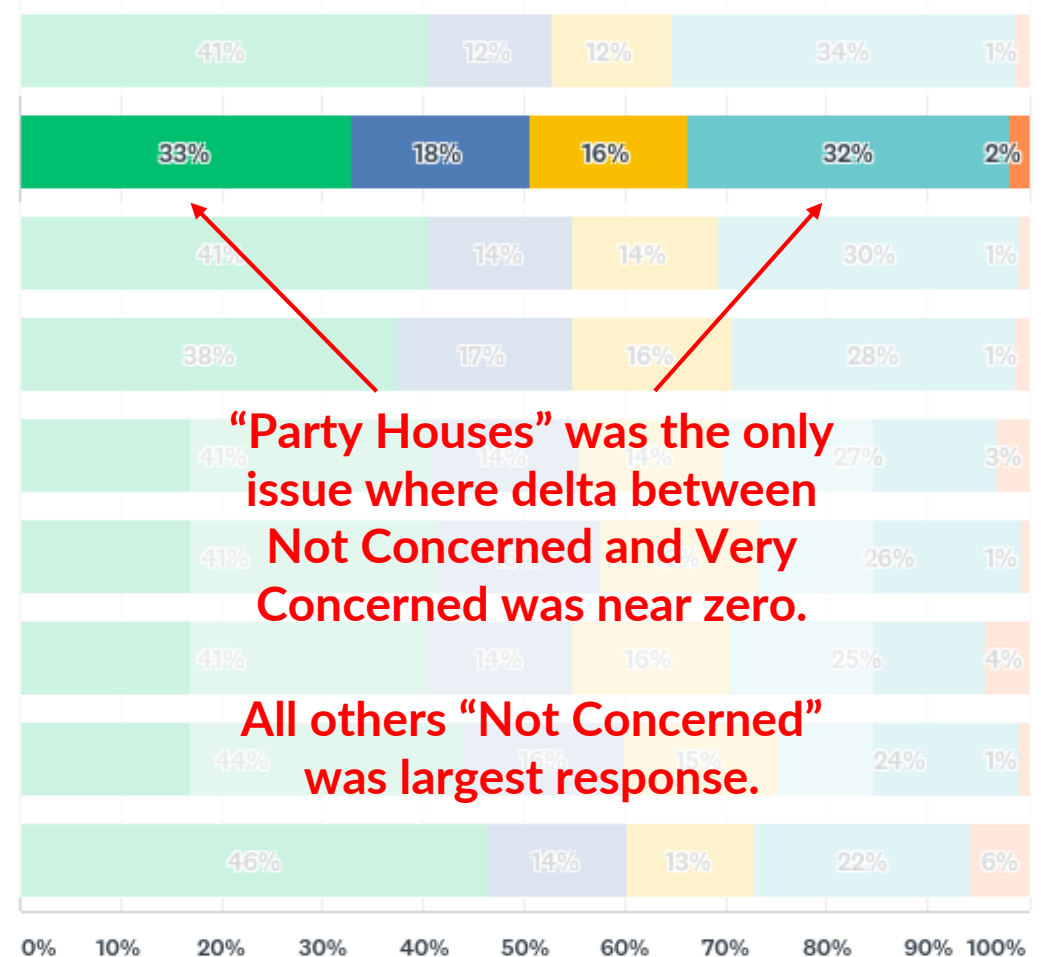
Loss of Long-Term Housing

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Increases in Housing Prices



“Party Houses” was the only issue where delta between Not Concerned and Very Concerned was near zero.

All others “Not Concerned” was largest response.



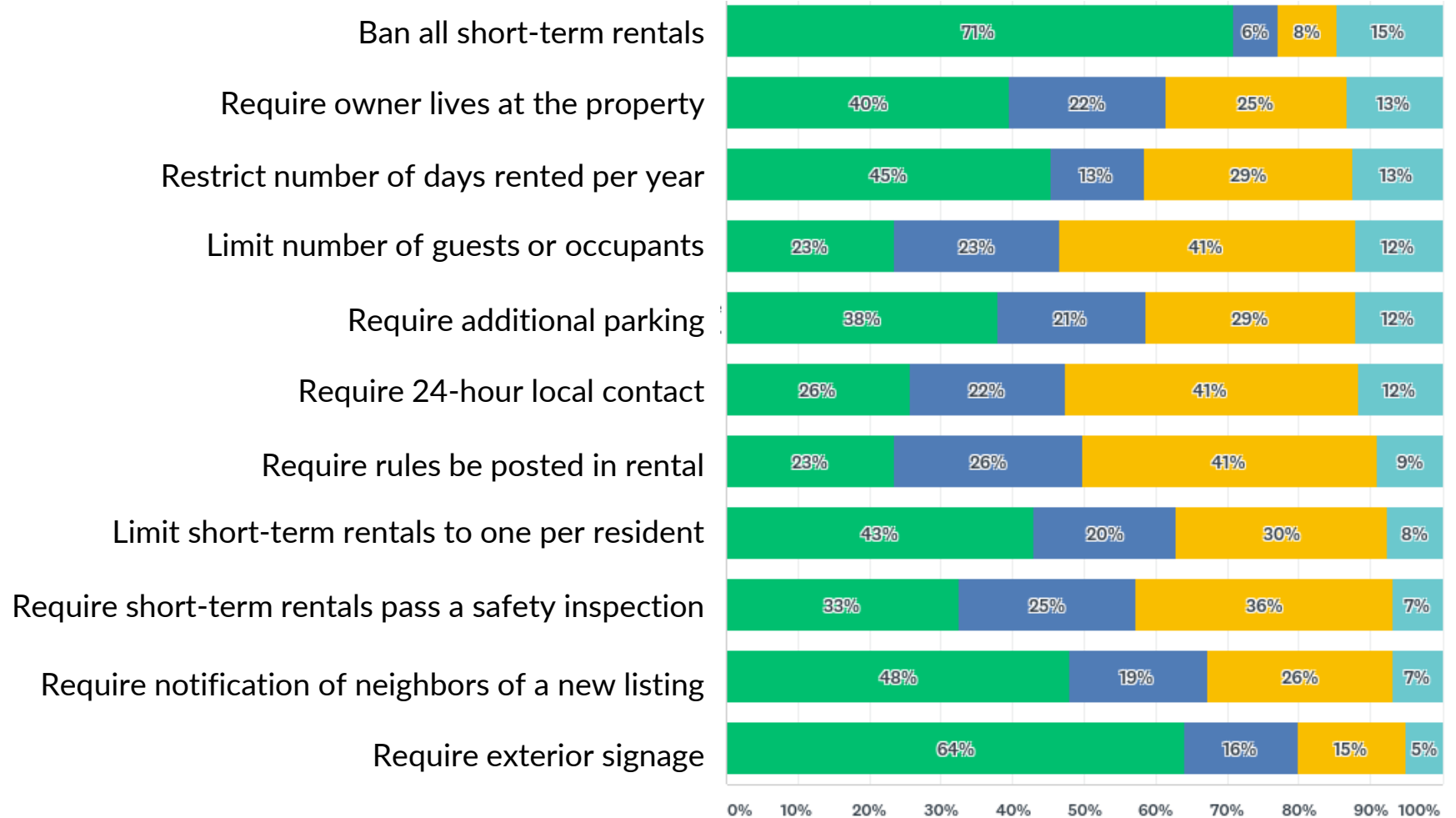
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Overall Findings

How would you prioritize the following Short-Term Rental regulations?



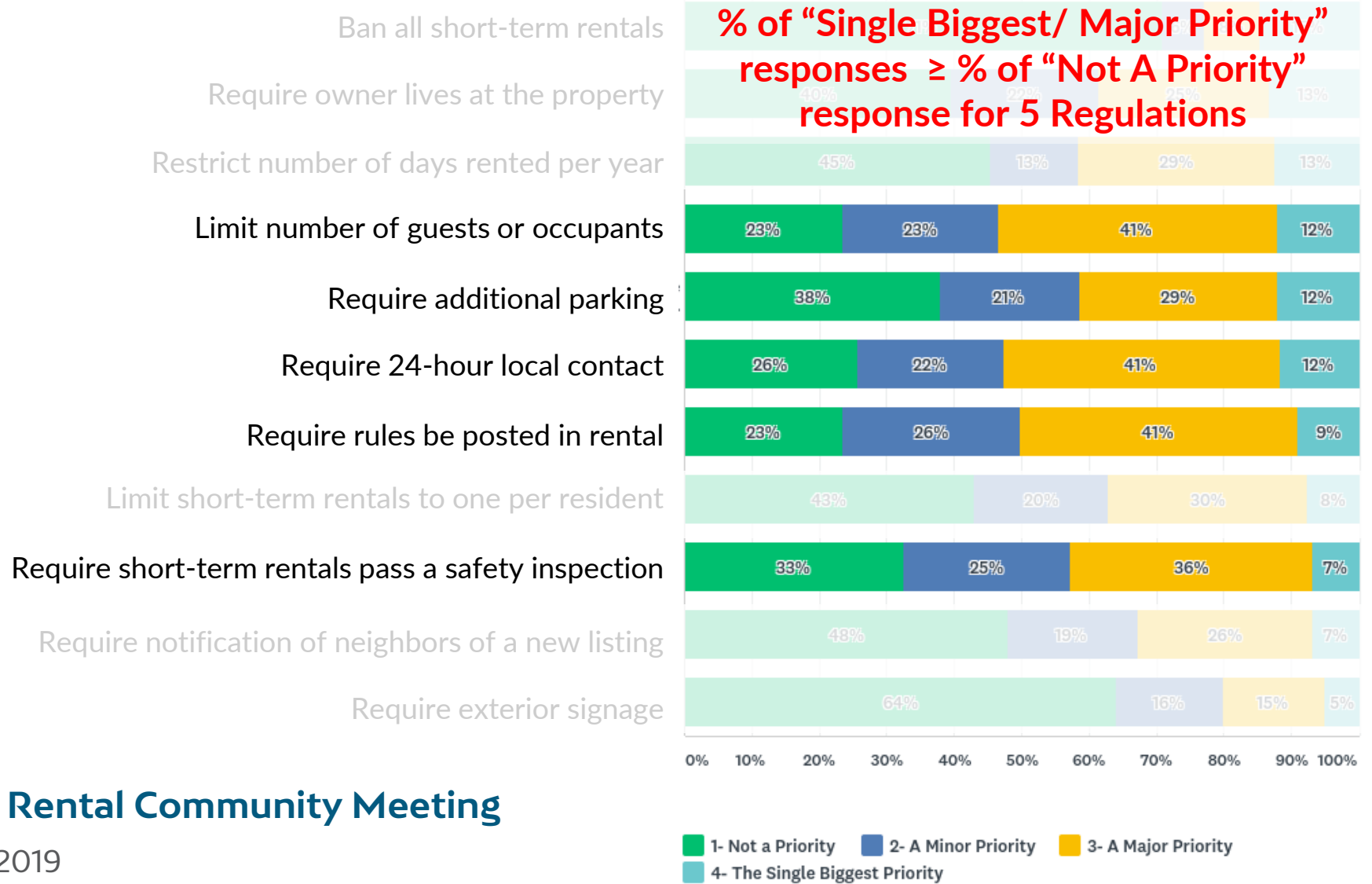
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■ 1- Not a Priority
 ■ 2- A Minor Priority
 ■ 3- A Major Priority
 ■ 4- The Single Biggest Priority

Overall Findings

How would you prioritize the following Short-Term Rental regulations?



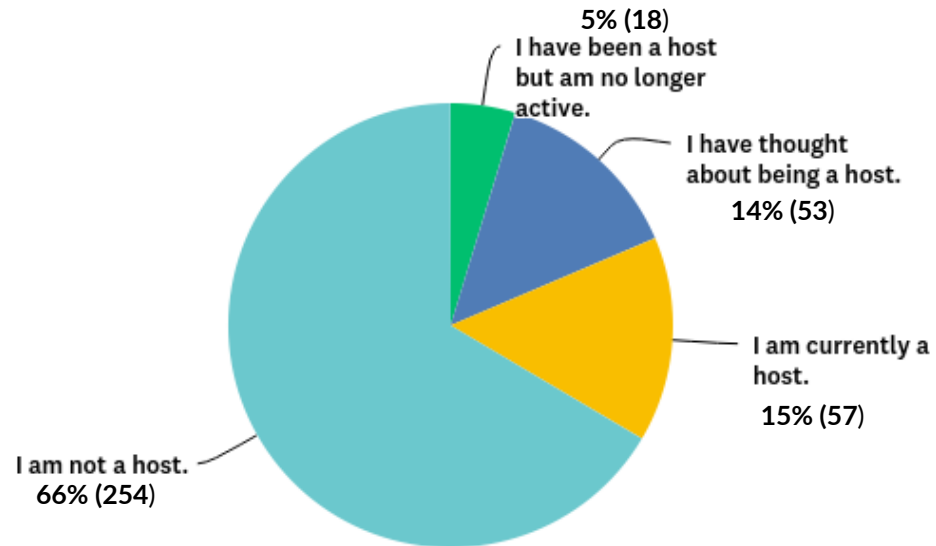
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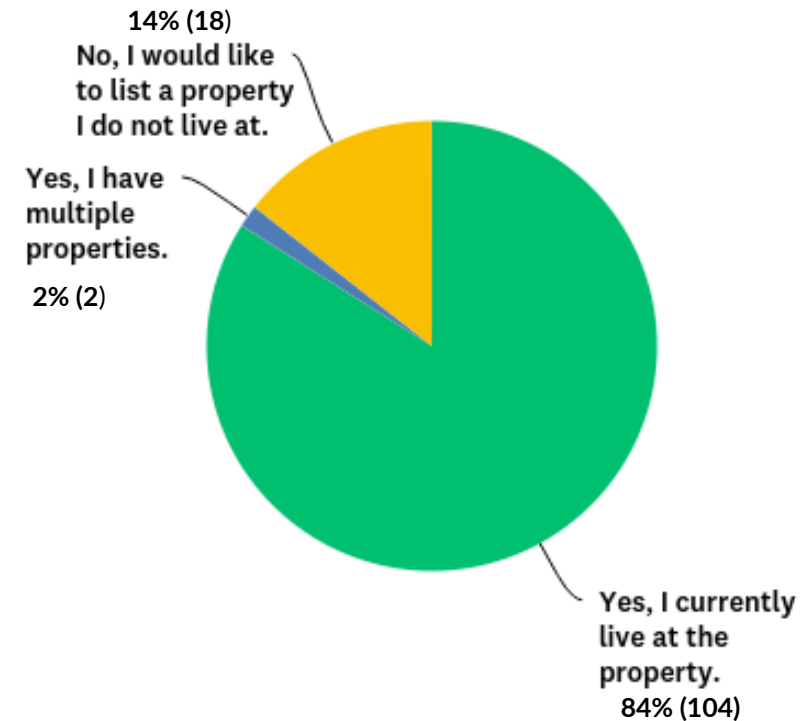
Community Survey: Short-Term Rental Hosts

Short-Term Rental Hosts

Have you ever been a Short-Term Rental Host?



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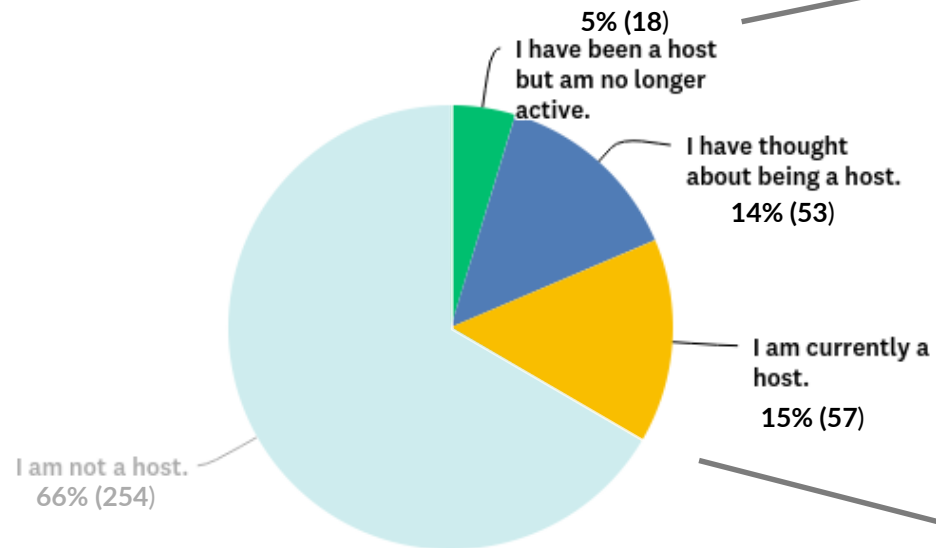


Short Term Rental Community Meeting

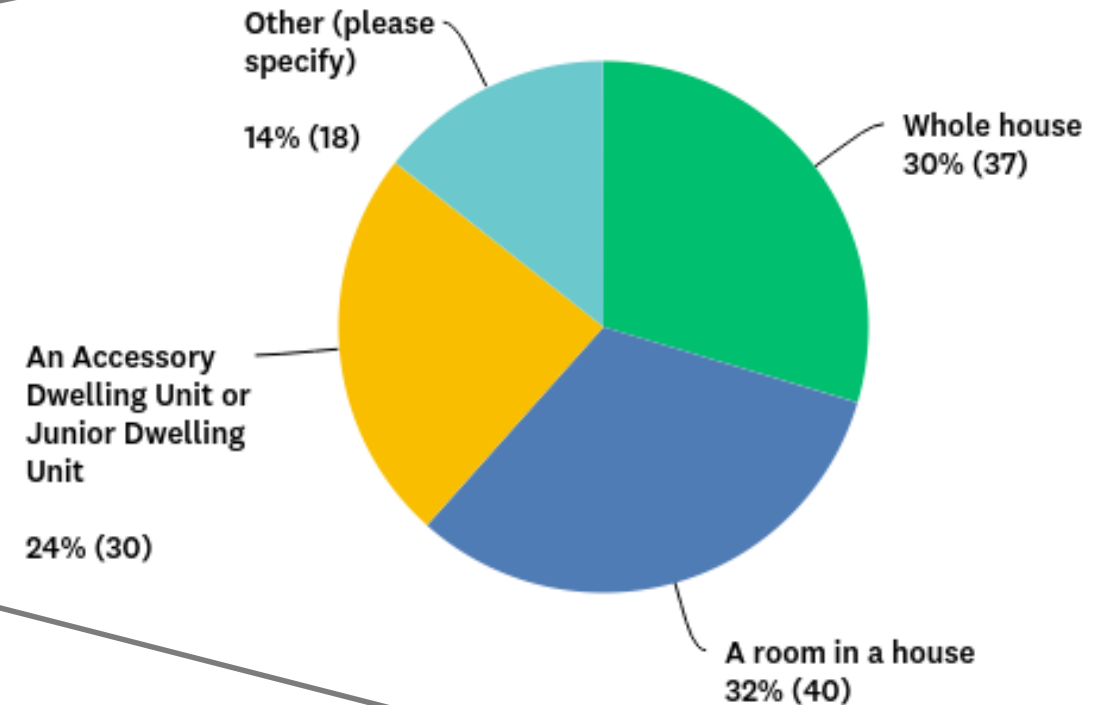
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Short-Term Rental Hosts

Have you ever been a Short-Term Rental Host?



Please select the type of listing you would host?

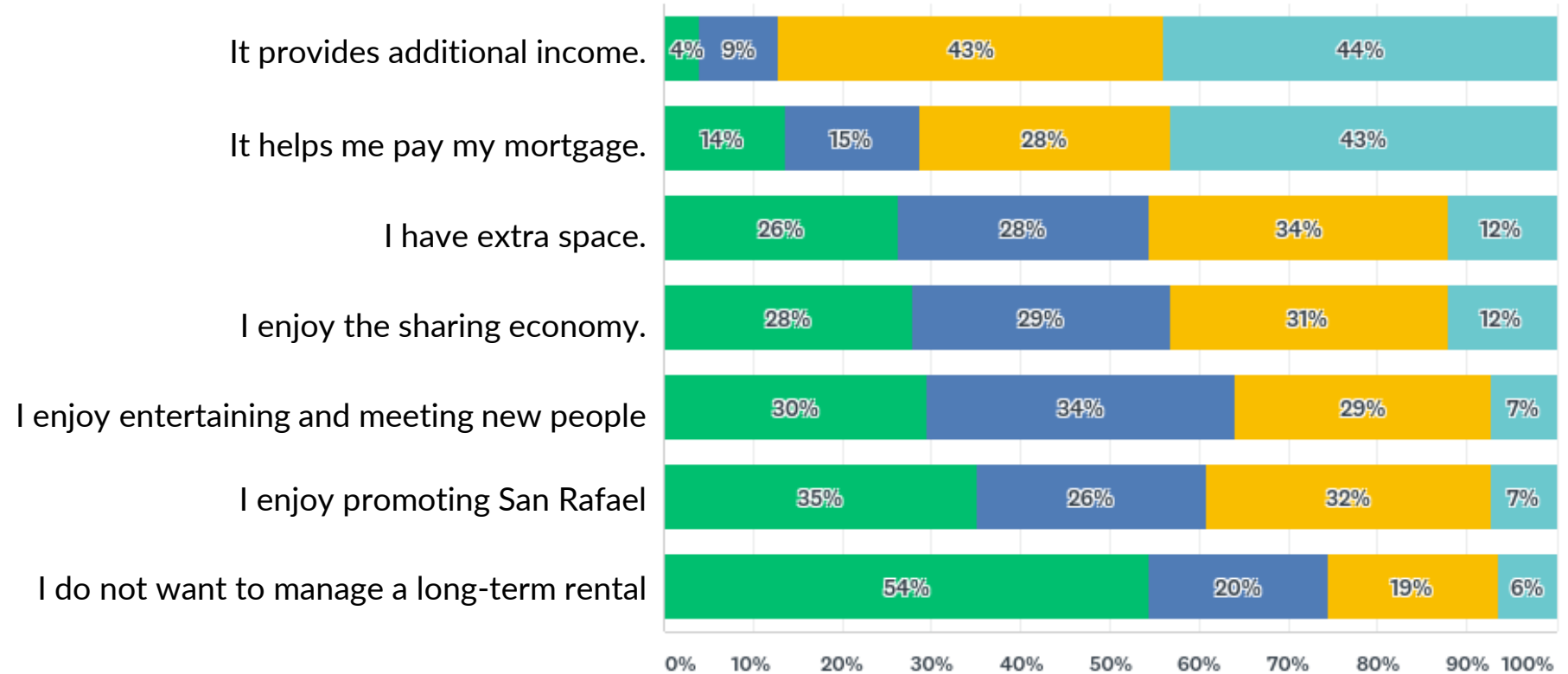


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Short-Term Rental Hosts

Why do you want to host a Short-Term Rental?



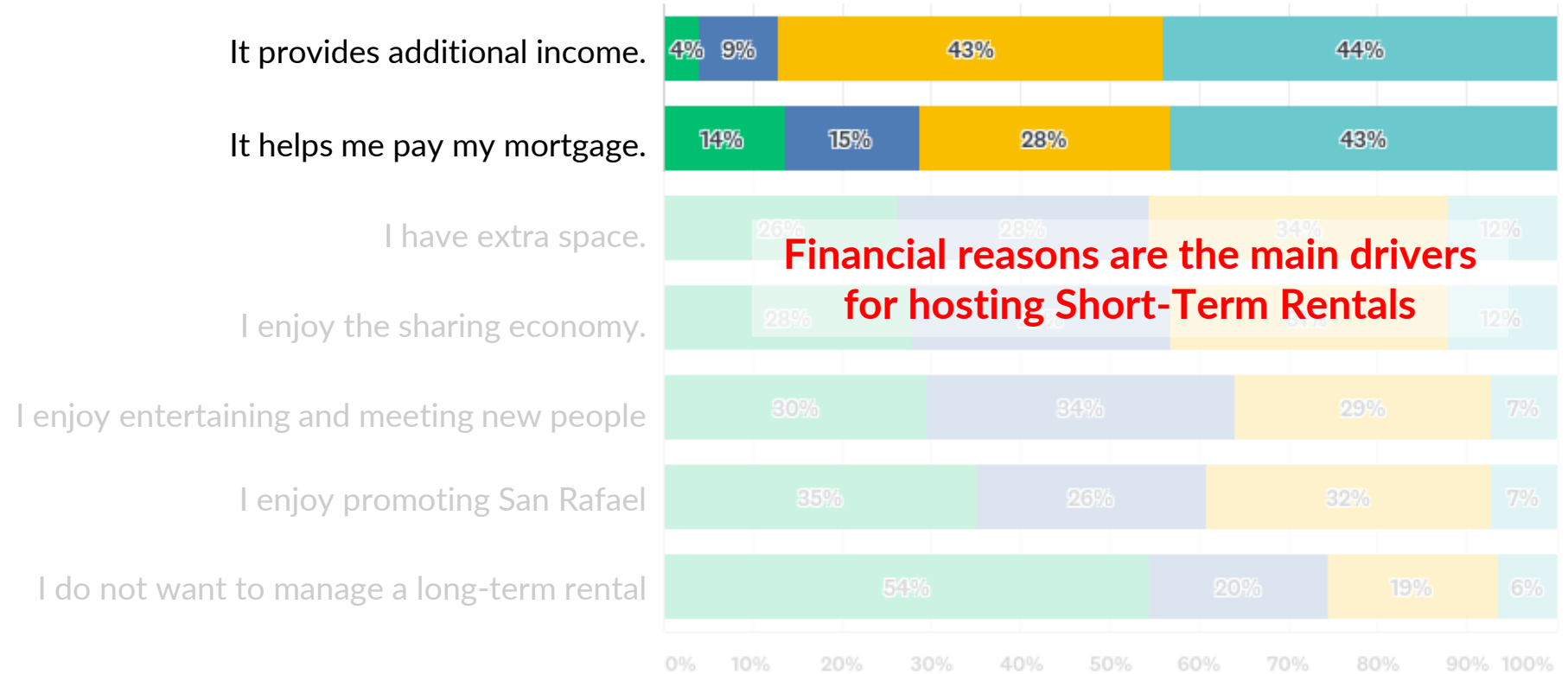
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■ 1- Not a Reason
 ■ 2- A Minor Reason
 ■ 3- A Major Reason
■ 4- The Single Biggest Reason

Short-Term Rental Hosts

Why do you want to host a Short-Term Rental?



Financial reasons are the main drivers for hosting Short-Term Rentals



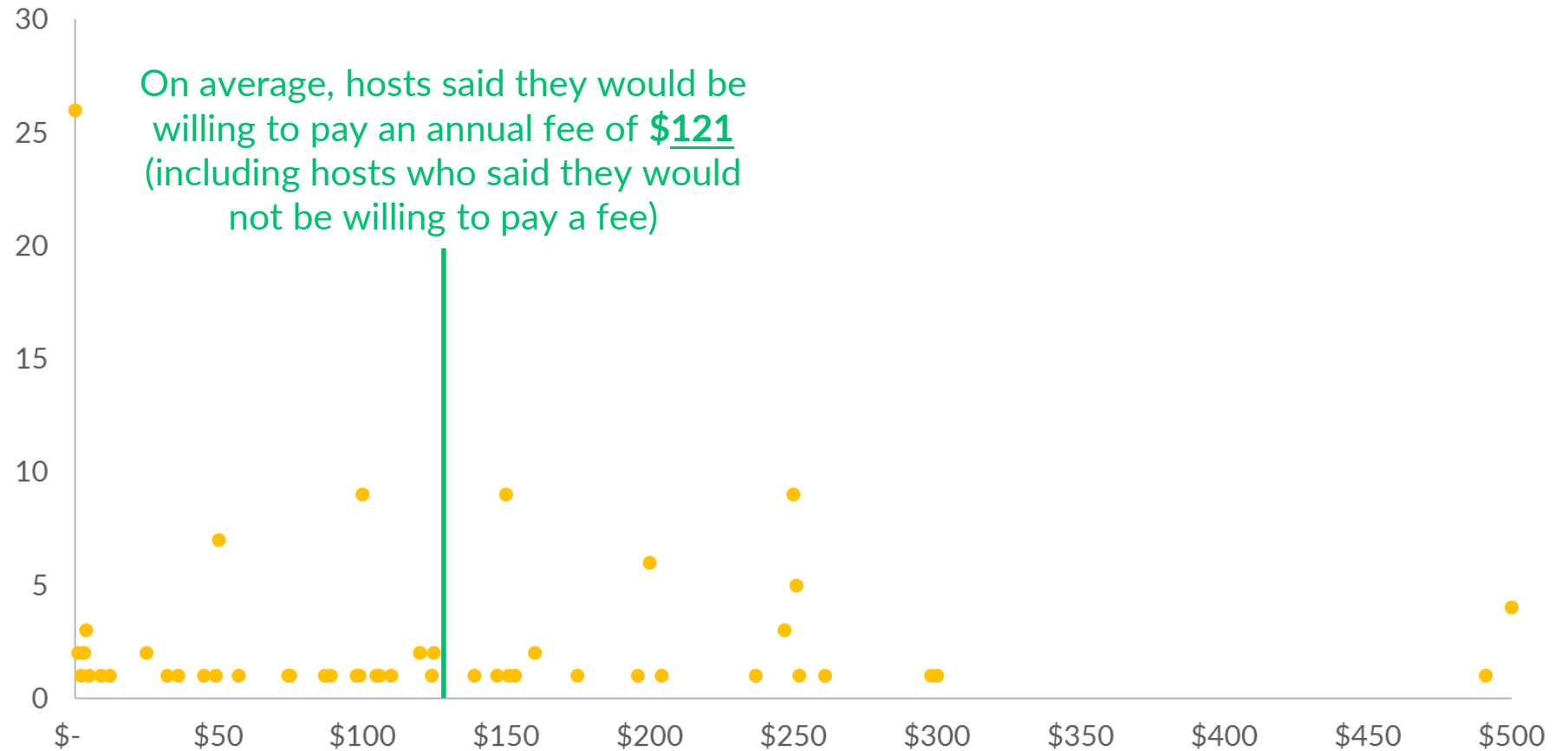
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■ 1- Not a Reason
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Short-Term Rental Hosts

58% (73) of Hosts said they would be willing to pay an annual registration fee.



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Community Survey: Non-Short-Term Rental Hosts

Deep Dive: Non-Short-Term Rental Hosts

254 Respondents (66% of all responses)

How concerned are you about the following challenges related to Short-Term Rentals?

Impacts on Neighborhood Character

Party Houses

Parking

Noise

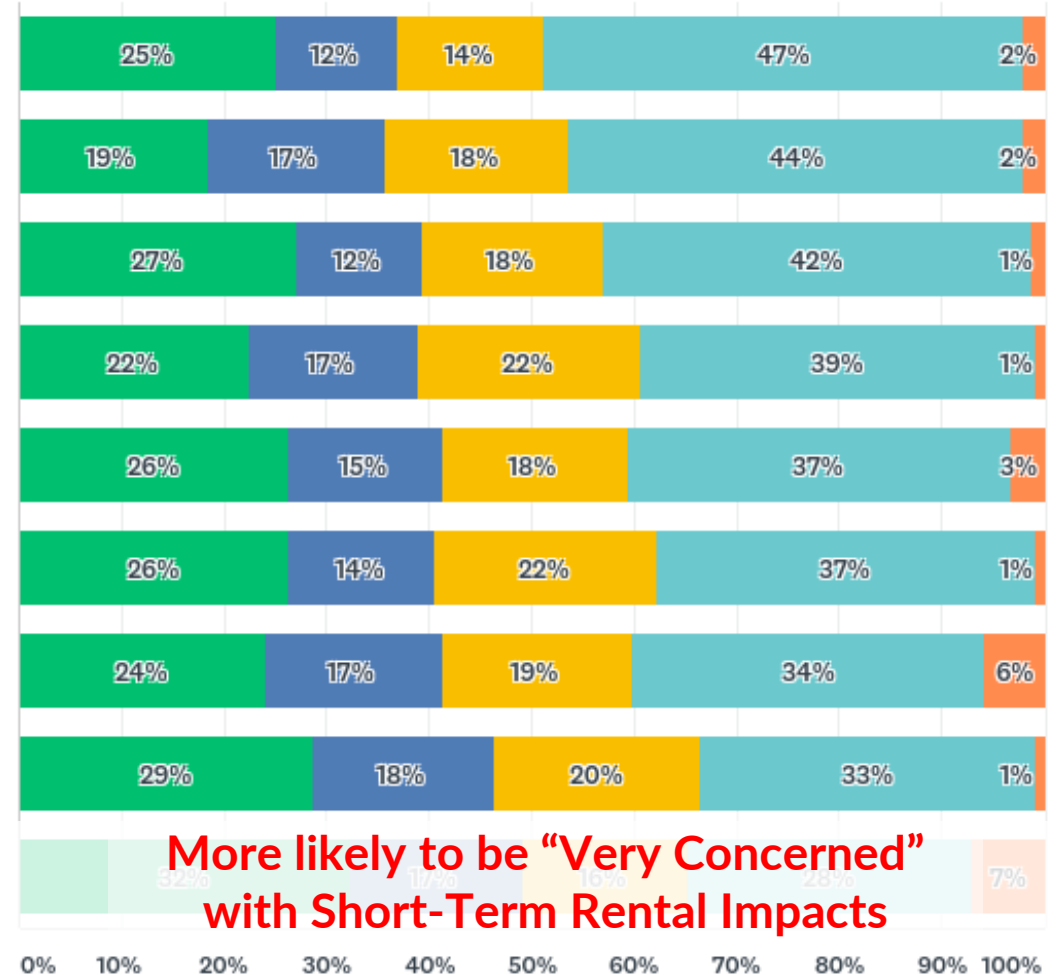
Loss of Long-Term Housing

Strangers in the Neighborhood

Resident Displacement

Personal Security

Increases in Housing Prices



More likely to be "Very Concerned" with Short-Term Rental Impacts



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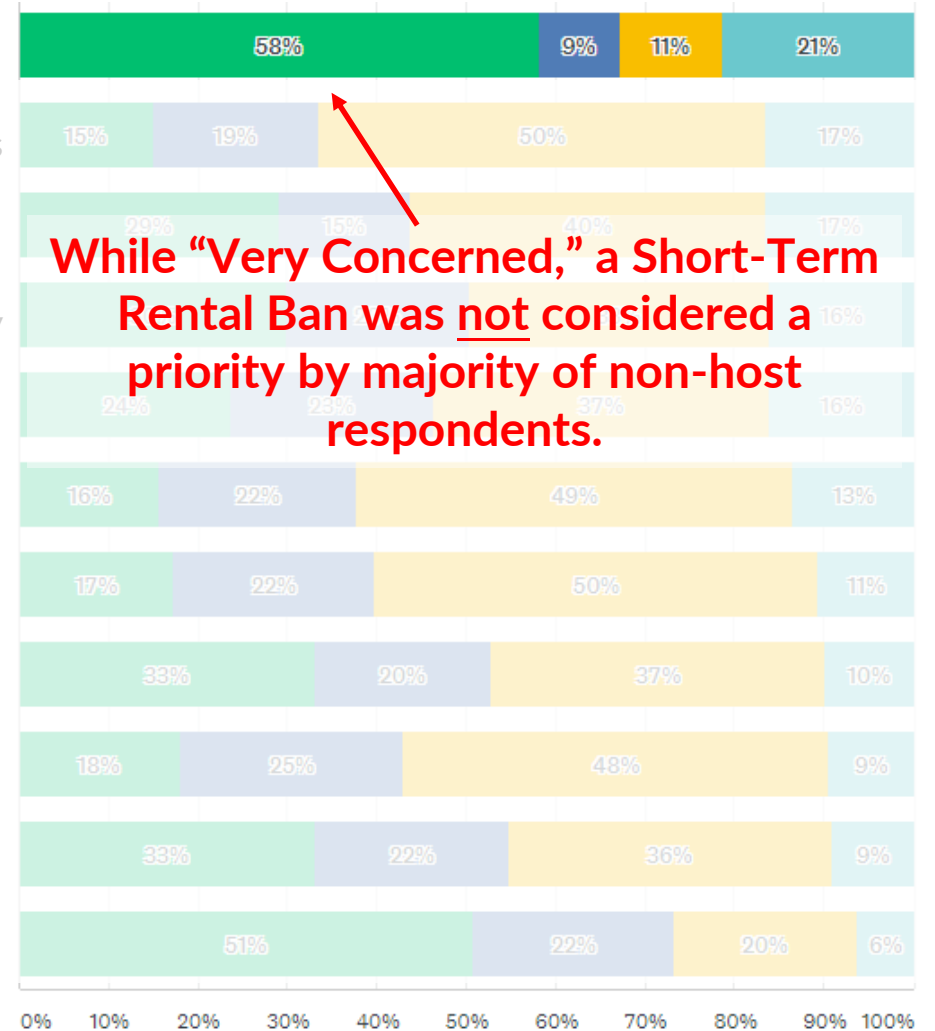
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Deep Dive: Non-Short-Term Rental Hosts

How would you prioritize the following Short-Term Rental regulations?

- Ban all short-term rentals
- Limit number of guests or occupants
- Restrict number of days rented per year
- Require owner lives at the property
- Require additional parking
- Require 24-hour local contact
- Require rules be posted in rental
- Limit short-term rentals to one per resident
- Require short-term rentals pass a safety inspection
- Require notification of neighbors of a new listing
- Require exterior signage



While "Very Concerned," a Short-Term Rental Ban was not considered a priority by majority of non-host respondents.



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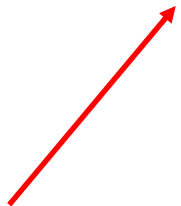
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■ 1- Not a Priority
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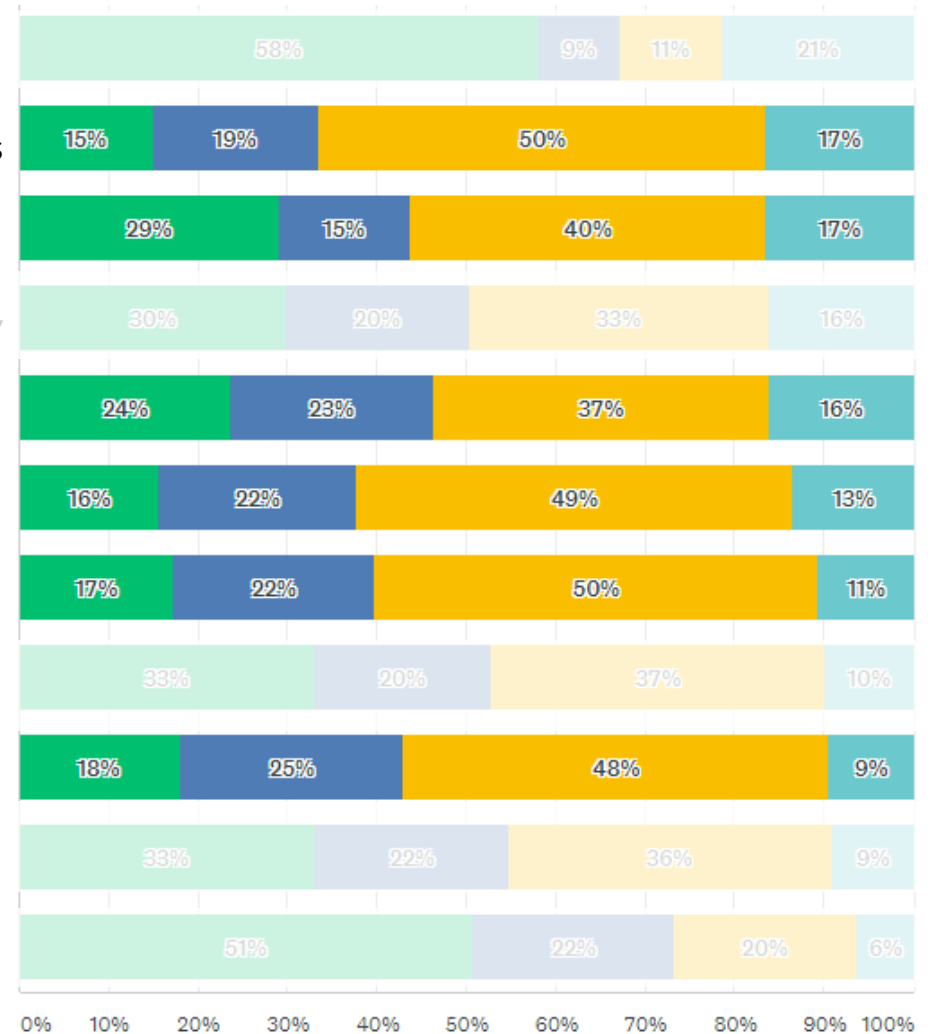
Deep Dive: Non-Short-Term Rental Hosts

Instead similar regulations as survey overall were identified, only with higher priority...

...Number of days rented per year is the only new regulation considered a priority.



- Ban all short-term rentals
- Limit number of guests or occupants
- Restrict number of days rented per year
- Require owner lives at the property
- Require additional parking
- Require 24-hour local contact
- Require rules be posted in rental
- Limit short-term rentals to one per resident
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1- Not a Priority 2- A Minor Priority 3- A Major Priority
4- The Single Biggest Priority

Deep Dive: Non-Short-Term Rental Hosts

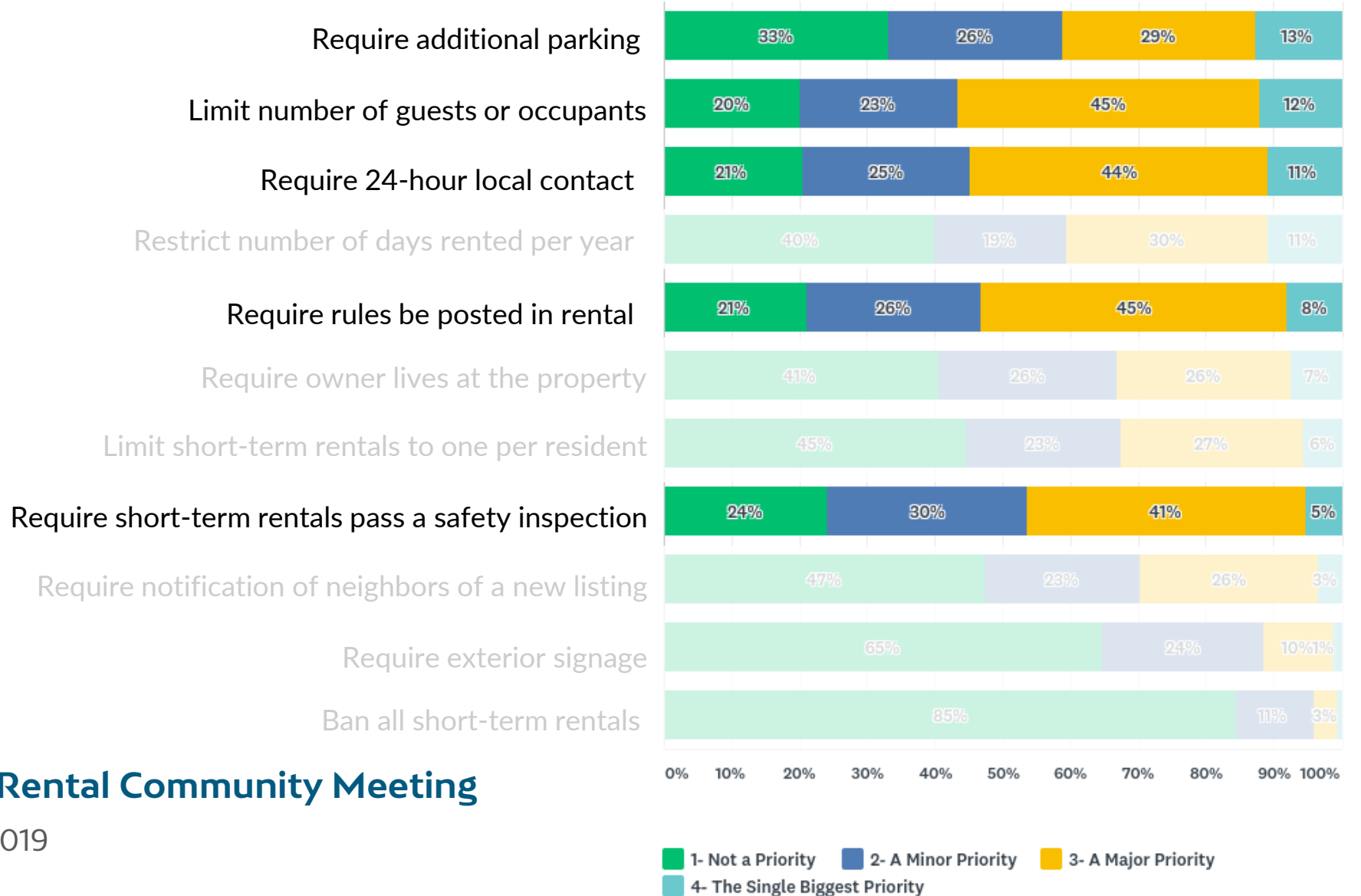
When non-host respondents who were supportive of a ban are removed...

...again, similar regulations as survey overall were identified, only with higher priority



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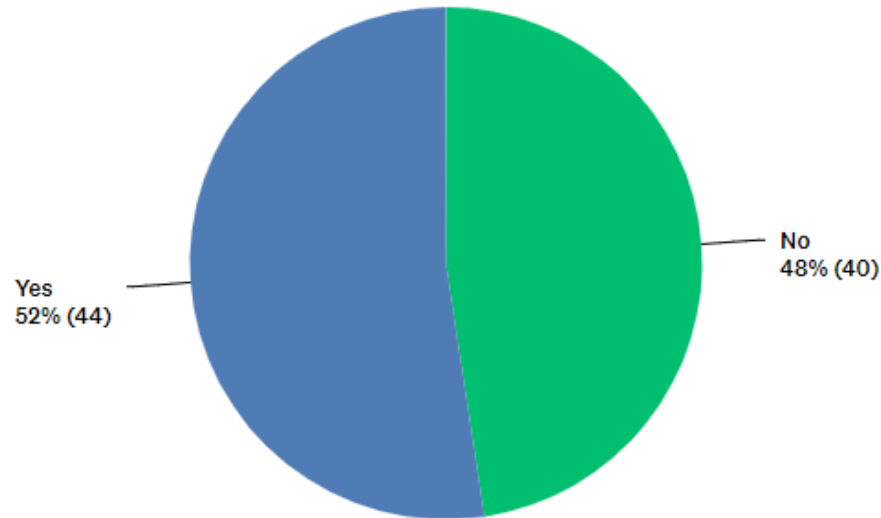


Community Survey: Supportive of Ban

Deep Dive: Supportive of Ban

Are you aware of any Short-Term Rentals in your neighborhood?

84 Respondents (22% of all responses)



48% of respondents who said they were supportive of a Short-Term Rental Ban, were unaware of Short-Term Rentals in their neighborhood.



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Deep Dive: Supportive of Ban

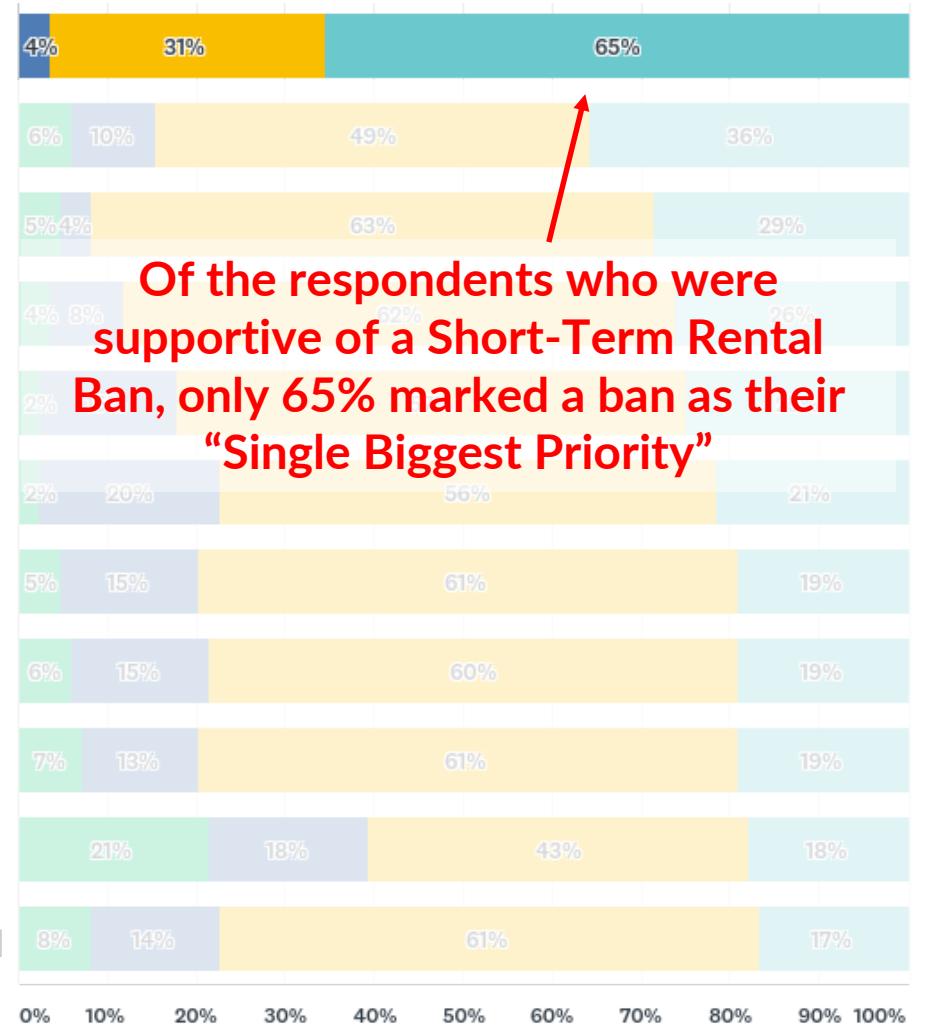
How would you prioritize the following Short-Term Rental regulations?



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- Ban all short-term rentals
- Require owner lives at the property
- Restrict number of days rented per year
- Limit number of guests or occupants
- Require additional parking
- Require notification of neighbors of a new listing
- Require 24-hour local contact
- Require short-term rentals pass a safety inspection
- Limit short-term rentals to one per resident
- Require exterior signage
- Require rules be posted in rental



Of the respondents who were supportive of a Short-Term Rental Ban, only 65% marked a ban as their "Single Biggest Priority"

■ 1- Not a Priority
 ■ 2- A Minor Priority
 ■ 3- A Major Priority
 ■ 4- The Single Biggest Priority

“Straw-Man” Proposal

What is a “Straw-man” Proposal?

A “Straw-man” Proposal is a **simple draft proposal intended to generate discussion of its disadvantages and to provoke the generation of new and better proposals.**



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Policy Proposal

Policy Element	Description
<i>Occupancy Limits</i>	<p>Occupancy is restricted to two people per bedroom. Properties must also be able to provide the appropriate off-street parking spaces for the occupancy they are providing.</p> <p><i>Ex. a studio and 1-bedroom could allow 2 or less people, a 3-Bedroom house would be 6 or less people. However, a 3-Bedroom house with only one (1) off-street parking space could only allow four (4) guests.</i></p>
<i>Parking Requirements</i>	<p>Listings must provide one (1) off-street parking space for every four (4) guests. A minimum of one (1) off-street parking space is required per listing.</p> <p><i>Ex. A studio and a one-bedroom listing would need to provide one (1) off-street parking space, a 2- and 3-bedroom listing would need to provide two (2) off-street parking spaces.</i></p>
<i>Accessory Dwelling Units</i>	<p>An existing Accessory Dwelling Units can be used as Short-Term Rentals only if they have received a Certificate of Occupancy prior to the effective date of the Short-Term Rental ordinance.</p>
<i>Owner-Occupancy Requirements</i>	<p>The property being used as a short-term rental must be the owner's primary residence.</p>



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Policy Proposal

Policy Element	Description
<i>Registration & Fees</i>	<p>Short-Term Rental hosts will be required to submit an initial registration and annual renewal. Hosts will need to pay the following registrations fees:</p> <ul style="list-style-type: none">• Initial Registration Fee: \$175• Annual Renewal Fee: \$125 <p>Hosts will also be required to collect and remit TOT (10% City, 2% County) for all rentals. For hosts using Airbnb, this collection and remittance will occur automatically through their platform.</p>
<i>Safety Inspections</i>	<p>As part of the registration, hosts will be required to conduct a self-certification inspection documenting their compliance with the program regulations, including:</p> <ul style="list-style-type: none">• Smoke and Carbon Monoxide Detectors;• Rules and Local Contact Information posted inside;• Off-Street Parking Requirements
<i>24-Hour Local Contact</i>	<p>Hosts will be required to have a Local Contact (within 30 miles) on file with the City whenever the listing is rented.</p>
<i>24-Hour Complaint Hotline</i>	<p>A 24-Hour Complaint Hotline will be available to neighbors in case of disturbance.</p>



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Meeting Questions

Survey

- How do the survey results compare to your expectations?
- What is most surprising?
- Did they change your perception of the topic? If so, how?

“Straw-man” Policy

- Is the policy in-line with the survey results?
- Would you support this policy?
 - If not, what is missing? What would you change?



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Next Steps

July 15th- City Council Staff Presentation (Tentative)

- Overview of Survey Findings
- Program Design Proposal
- Draft Ordinance

July 29th- City Council Potential First Reading of Ordinance



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Updates and Contact Information

- Staff posting updates to Short Term Rental Webpage:

www.cityofsanrafael.org/short-term-rentals/

- Contact Information:

- ethan.guy@cityofsanrafael.org
- 415.458.2392



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