



Research Report

# Opinions of Short Term Letting within Residential Apartments

Prepared for: City of Sydney

April 2017



## Table of Contents

---

<b>Table of Contents .....</b>	<b>2</b>
<b>1. Background &amp; Objectives .....</b>	<b>3</b>
<b>2. Research Design .....</b>	<b>4</b>
<b>3. Demographic Profile of Respondents.....</b>	<b>7</b>
<b>4. Relationships with Neighbours .....</b>	<b>11</b>
4.1 Familiarity with neighbours .....	11
4.2 Communication with neighbours .....	12
4.3 Overall relationship with neighbours .....	13
<b>5. Awareness &amp; Usage of Short Term Letting Platforms .....</b>	<b>14</b>
5.1 Incidence of short term letting occurring in building .....	14
5.2 Personal impact of short term letting occurring in building .....	15
5.3 Personal use of short term letting platforms .....	18
<b>6. Opinions of Short Term Letting.....</b>	<b>21</b>
6.1 Issues of personal importance .....	21
6.2 Reasons for short term letting being seen as an issue .....	24
6.3 Support for short term letting .....	26
6.4 Perceptions of strata committee powers .....	29
<b>7. Information &amp; Advice Sources .....</b>	<b>32</b>
<b>8. Summary of Findings.....</b>	<b>34</b>
<b>Appendix. Questionnaire.....</b>	<b>37</b>

## 1. Background & Objectives

---

The City of Sydney is one of the most densely populated Local Government Areas in Australia, with around 75% of residents living in strata titled dwellings.

With the advent of online advertising platforms, it is now much easier for property owners to let their properties for short term occupation. It appears that there is 'rapid growth in letting and an expansion of the tourist and visitor accommodation market'<sup>1</sup>.

Whilst some believe that there may be a need to ease the rules governing short-term letting, others may see it as an impost in residential areas, particularly in the case of short-term rental accommodation in strata properties. The proximity of residents in strata buildings and the nature of common property mean that any conflicting uses in strata buildings have the potential to be problematic. For example, should owner corporations be able to recover costs from the landlords for wear and damage to common property generated by their guests, should apartment owners be liable for any damage caused by their guests, should compensation be given to neighbours, should short-stays in apartments be banned if repeatedly used for unruly parties, etc.

On 30<sup>th</sup> November 2016 the strata laws in NSW were updated. The new laws have more than 90 changes, some of which affect strata owners and residents in strata-titled townhouses and units.

In October 2016 the NSW Government tabled a report on the *Adequacy of the regulation of short-term holiday letting in NSW*. The NSW Government's response, indicating what actions it will take, is due on 19 April.

The City of Sydney is currently adopting a balanced position - requesting that the NSW Government strike a balanced approach to short term letting rules. However, in order to understand the strata community views towards the issue of short term letting, the City was keen to gain an independent and evidence based view of this segment.

Woolcott Research & Engagement was selected to undertake this independent review.

---

<sup>1</sup> Legislative Assembly Committee on Environment and Planning  
Adequacy of the Regulation of short-term holiday letting in New South Wales  
Report 1/56 – October 2016

## 2. Research Design

---

### Fieldwork Process

The study was quantitative in nature, involving a series of n=1,001 interviews amongst strata building residents within the City of Sydney LGA.

Due to the need to capture a representative sample of strata building residents, a multi-modal approach was adopted. Initially this involved interviewing via telephone (CATI) and online (via online panels) – however, this was not producing the required proportion of young renters. As such, intercept interviewing was also introduced as a means of gaining widespread feedback from strata building residents.

The final breakdown of the interviews achieved was as follows:

- N=356 telephone (CATI) interviews from listings in the electronic White Pages
- N=358 online interviews from dedicated research only panel providers
- N=287 street intercept interviews

The questionnaire (see Appendix) took just under 10 minutes to administer, and all interviewing took place between 13 March and 9 April 2017.

### Notes on the Target Audience

Some of the key segments of interest in this study are notoriously difficult to contact (e.g. Under 35 year olds & Tenants) due to their likelihood of being in mobile only households, and the more transient nature of their residence. Investors are also a very difficult segment to reach, as they could be based anywhere.

While relatively large samples were obtained for the three age groups of interest, due to the above issues, those under 35 were still slightly under-represented in the Total. As a result, the data has been post-weighted (by age only) to ensure that the Total is truly representative of the City of Sydney population.

### Notes on the Interpretation of Results

Where relevant, significance testing has been carried at the 95% confidence interval. Where results have been found to be significantly higher than the Total, they are indicated in bold green, and where they have been found to be significantly lower than the Total, they have been indicated in bold red.

Due to rounding, percentages may not always add to 100. In addition, with open-ended (or free response) questions, respondents can provide detailed answers that contain more than one idea/theme. Each such idea is coded separately, and so it follows that the total of all percentages often exceeds 100%.

## Survey Results

### 3. Demographic Profile of Respondents

As depicted in Table 1, the respondent base was very evenly split by gender, with almost a 50/50 male to female split achieved. However, the Investor respondents were significantly more likely to be male (71%), while those under the age of 35 were significantly more likely to be female (55% were).

In terms of age, 50% of all respondents were under the age of 35, with Tenants significantly more likely to be in this age category (68%). While 17% were aged 55 or more, Owner Occupiers were significantly more likely to be 55+ (37%).

**Table 1. Age and gender**

	Total (n=1001) %	Tenant (n=455) %	Owner- occupier (n=486) %	Investor (n=72) %	Under 35 (n=321) %	35 to 54 (n=322) %	55+ (n=355) %
Gender							
Male	49	46	50	71	45	54	53
Female	50	54	49	29	55	45	47
Non-binary	1	-	1	-	1	1	-
Age							
18-24 years	14	20	6	8	27	-	-
25-34 years	36	48	19	37	73	-	-
35-54 years	32	27	37	43	-	100	-
55-74 years	13	4	28	9	-	-	75
75+ years	4	1	9	2	-	-	25
Refused	*	-	1	-	-	-	-

D1. Please indicate your gender:

D2 And which age bracket do you fall into?

Base: All respondents (n=1001).

\* Less than 1%

Table 2 shows the breakdown of respondents by respondent type, with the majority of respondents indicating that they were a Tenant within the City of Sydney (56%), while just under four in ten were Owner-occupiers (38%). As respondents could fit in more than one category, almost one in ten (8%) were investors.

In terms of household income, respondents were fairly evenly spread. At the lower end, 16% of respondents indicated that theirs was under \$40K per annum (23% of Tenants), while at the high end 24% indicated that their household income was in excess of \$150K (34% of those aged 35 to 54).

**Table 2. Respondent type and income**

	Total (n=1001) %	Tenant (n=455) %	Owner- occupier (n=486) %	Investor (n=72) %	Under 35 (n=321) %	35 to 54 (n=322) %	55+ (n=355) %
<b>Respondent type</b>							
Tenant	56	100	-	-	76	47	18
Owner-occupier	38	-	100	-	19	44	79
Investor	8	-	-	100	7	10	5
<b>Income</b>							
Under \$20,000	7	11	3	*	11	3	5
\$20,000-\$39,000	9	12	6	4	12	3	12
\$40,000-\$59,999	10	10	9	16	12	8	11
\$60,000-\$99,999	21	23	21	17	23	22	16
\$100,000-\$149,999	21	20	22	25	20	26	15
\$150,000-\$200,000	13	14	10	16	13	16	5
Over \$200,000	11	8	14	21	7	18	10
Refused	7	2	14	2	2	5	25

S2. Please indicate if you are...

D4. Can you please let me know which category best fits your total household income before tax?

Base: All respondents (n=1001).

\* Less than 1%



In order to make sure that the survey captured views from a range of strata scheme dwellers, the questionnaire also sought to capture the City of Sydney Village area that they lived in. Table 3 shows that a reasonable spread was achieved throughout the Local Government Area.

**Table 3. Village areas**

	Total (n=1001) %	Tenant (n=455) %	Owner- occupier (n=486) %	Investor (n=72) %	Under 35 (n=321) %	35 to 54 (n=322) %	55+ (n=355) %
Village areas							
Crown St	5	4	7	6	3	8	8
Glebe Pt Rd	9	11	8	5	11	6	11
Green Square	20	23	16	9	26	18	5
Harbour	10	9	11	25	11	7	14
Harris St	8	6	10	9	4	8	19
Haymarket	7	4	9	11	7	6	4
King St	10	11	10	9	11	12	6
Kings Cross	15	16	14	8	13	15	19
Oxford St	7	7	7	14	4	11	9
Redfern St	8	9	7	4	9	9	5

S4 Please indicate which suburb your property is in?

Base: All respondents (n=1001).

Respondents were also asked to reveal the main language spoken in their household (not the incidence of speaking a language other than English), and Table 4 shows that almost 10% of respondents indicated that the main language spoken in their household was something other than English (9%), with the incidence of this highest amongst respondents under 35 years of age (12%).

**Table 4. Main language in household**

	Total (n=1001) %	Tenant (n=455) %	Owner- occupier (n=486) %	Investor (n=72) %	Under 35 (n=321) %	35 to 54 (n=322) %	55+ (n=355) %
Main language in household							
English	91	90	93	91	88	92	96
Mandarin	2	1	2	-	3	-	-
Chinese (unspecified)	1	1	1	4	2	-	*
Italian	1	1	*	1	1	1	*
Cantonese	1	1	1	-	1	1	*
French	1	1	*	1	1	*	1
German	*	1	*	-	*	1	*
Spanish	*	*	*	-	*	*	*
Other	3	6	2	3	3	4	3

D4. What is the main language spoken in your household?

Base: All respondents (n=1001).

\* Less than 1%

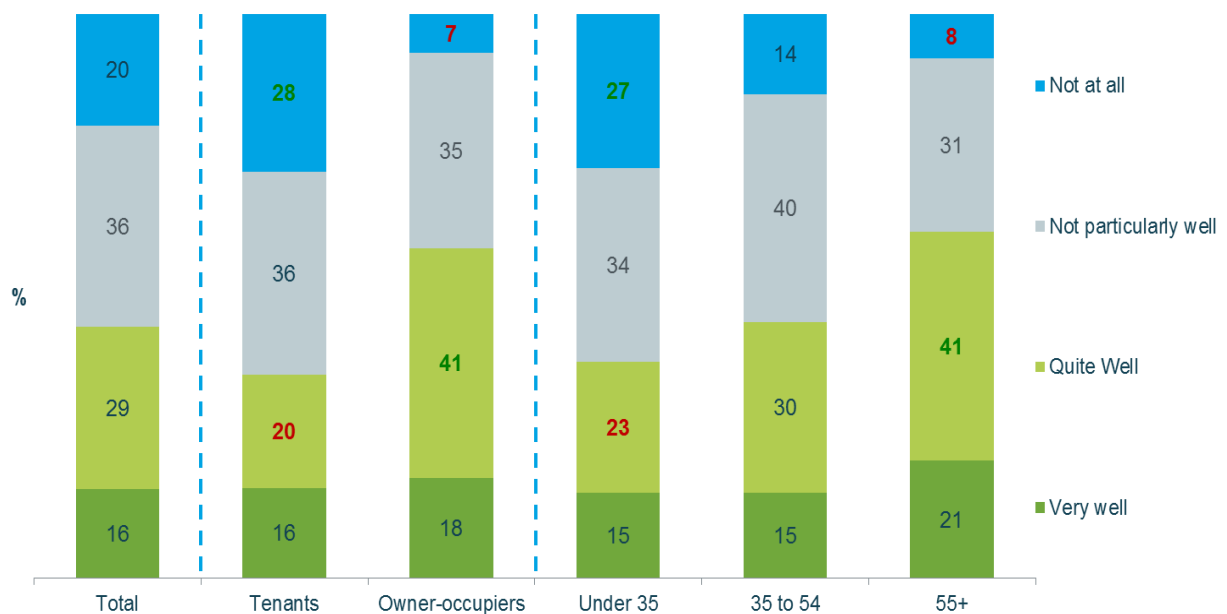
## 4. Relationships with Neighbours

### 4.1 Familiarity with neighbours

The Tenant and Owner-occupier respondents were asked to reveal how well they know the neighbours in the building they live in. As shown in Figure 1, just under half (45%) felt that they knew their neighbours well (either 'very' or 'quite' well). Incidence of this was significantly higher amongst the Owner-occupiers and respondents over the age of 55 (59% and 62% respectively). However, incidence of indicating that they know their neighbours 'very well' was quite consistent across all sub-groups.

Even so, one in five respondents (20%) indicated that they did not know their neighbours at all – with the incidence of this being significantly higher amongst Tenants and those aged under 35 (28% and 27% respectively).

**Figure 1. Familiarity with neighbours**



Q1. How well would you say that you know your neighbours in the building you live in?

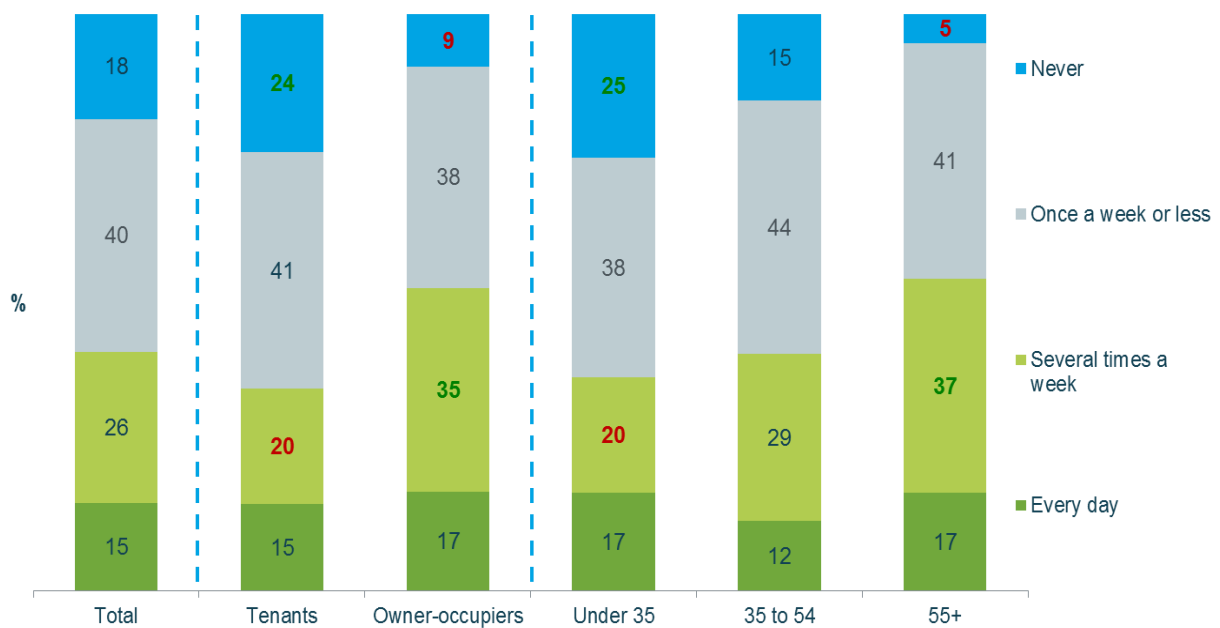
Base: Total (n=929); Tenants (n=455); Owner-occupiers (n=486); Under 35 (n=299); 35 to 54 (n=289); 55+ (n=338).

## 4.2 Communication with neighbours

The Tenant and Owner-occupier respondents were also asked to reveal how often they communicate with their neighbours. As shown in Figure 2, the results are very similar to those of familiarity (see Figure 1). With 41% communicating with neighbours several times a week or more. Incidence of this was higher amongst the Owner-occupiers and respondents over the age of 55 (52% and 54% respectively), while incidence of indicating that they communicate 'every day' was quite consistent across all sub-groups.

Just under one in five respondents (18%) indicated that they 'never' communicate with their neighbours – with the incidence of this being significantly higher amongst Tenants and those aged under 35 (24% and 25% respectively).

**Figure 2. Communication with neighbours**



Q2. And how often do you communicate with your neighbours?

Base: Total (n=929); Tenants (n=455); Owner-occupiers (n=486); Under 35 (n=299); 35 to 54 (n=289); 55+ (n=338).

### 4.3 Overall relationship with neighbours

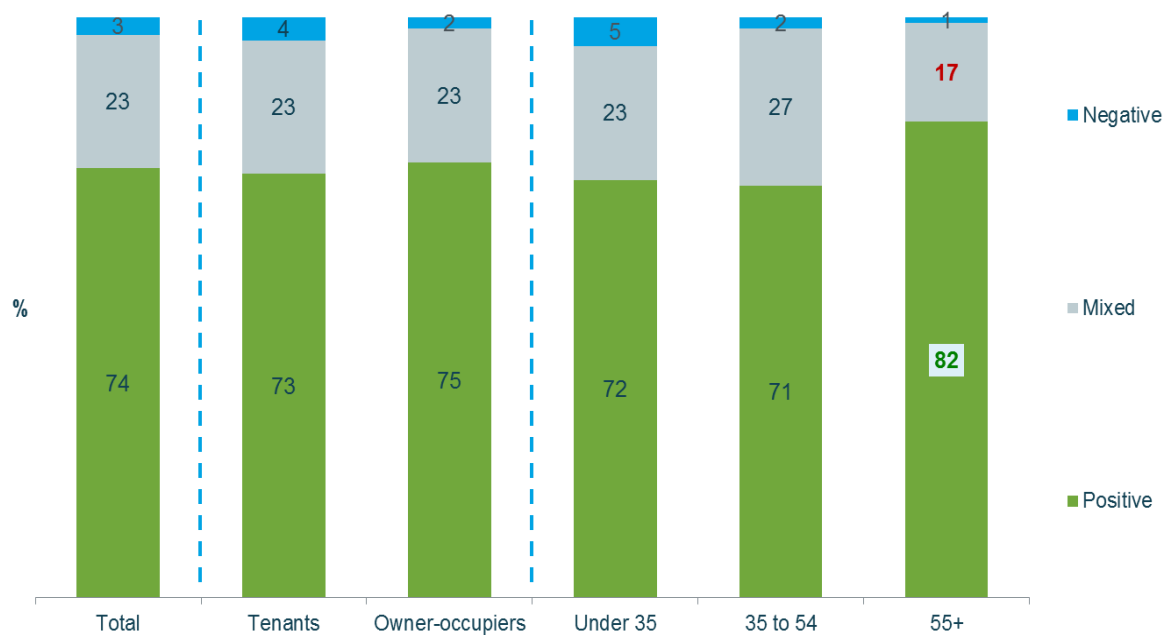
As an overall measure, the Tenant and Owner-occupier respondents were asked to indicate if the relationship they have with their neighbours was positive or negative.

Just under three quarters of all respondents indicated that they have a positive relationship (74%), with this being fairly consistent across all of the main sub-groups (though higher amongst those aged over 55, at 82%).

Only 3% of respondents indicated that they had a negative relationship with their neighbours.

Despite the fact that Tenants and those aged under 35 appeared to have less contact with their neighbours (see Figures 1 & 2), they were no more likely to indicate that they had negative relationships.

**Figure 3. Relationship with neighbours**



Q3. And in general, would you say that your relationship with your neighbours is...

Base: Total (n=929); Tenants (n=455); Owner-occupiers (n=486); Under 35 (n=299); 35 to 54 (n=289); 55+ (n=338).

## 5. Awareness & Usage of Short Term Letting Platforms

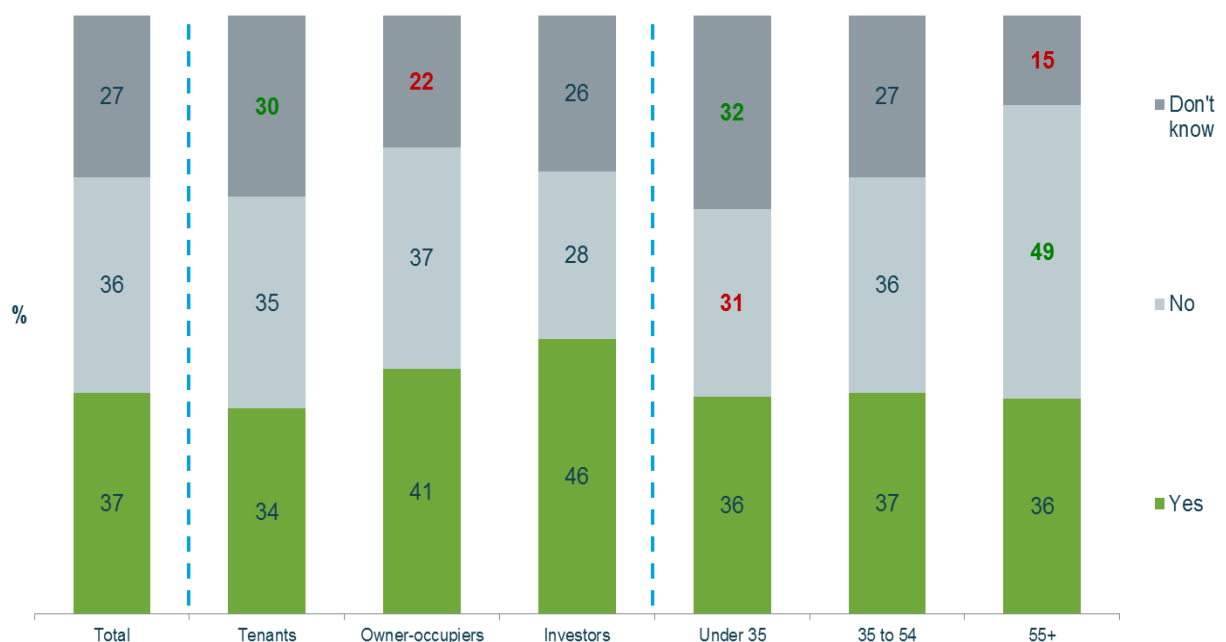
### 5.1 Incidence of short term letting occurring in building

All respondents were asked to reveal whether or not short term letting occurred in their building, and Figure 4 shows that almost two fifths of all respondents believed that it did (37%) - with the incidence of this being highest amongst Investors (46%).

While more than a third of all respondents did not believe that short term letting occurred in their building (36%), the remainder (27%) weren't sure if it did or didn't occur.

The Tenants and respondents under the age of 35 (who were less familiar with their neighbours, see Figure 1), were significantly more likely to indicate that they didn't know if it occurred in their building (30% and 32% respectively).

**Figure 4. Incidence level of short term letting in building**



Q7. Does any short term letting take place in your building that you are aware of?

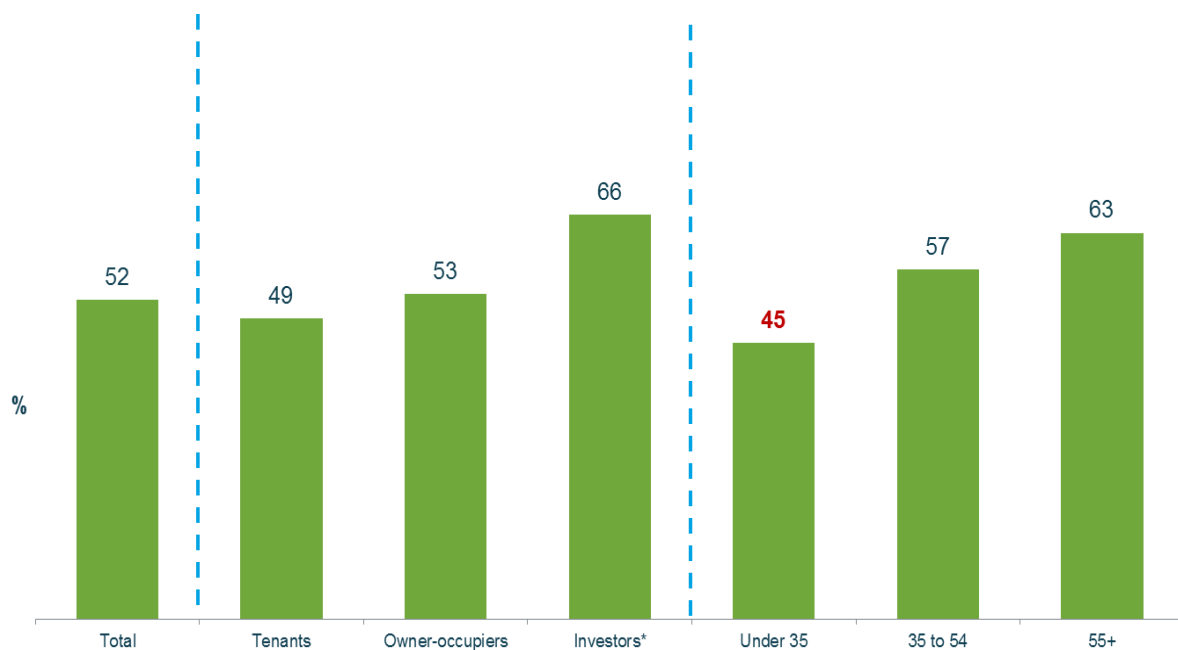
Base: All respondents (n=1001); Tenants (n=455); Owner-occupiers (n=486); Investors (n=72); Under 35 (n=321); 35 to 54 (n=322); 55+ (n=355).

## 5.2 Personal impact of short term letting occurring in building

Respondents who indicated that short term letting did occur in their building (37% of all respondents, see Figure 4) were asked if the occurrence of short term letting had a personal impact on them.

As shown in Figure 5, just over half of the respondents who indicated that short term letting occurred in their building went on to indicate that they were personally impacted by it (52%). Investors, and those over the age of 55 were the most likely to indicate some form of personal impact (66% and 63% respectively).

**Figure 5. Incidence of personal impact by short term letting in building**



Q8. Does this impact you personally?

Base: Respondents aware of short-term letting occurring in their building (n=365); Tenants (n=150); Owner-occupiers (n=196); Investors (n=30\*); Under 35 (n=122); 35 to 54 (n=119); 55+ (n=126).

\* CAUTION: small base size (n<40).

Respondents who indicated that they were personally impacted by the short term letting occurring in their building (19% of all respondents) were asked to explain how they were impacted.

Table 5 shows that the most common impact was that of noise created (26%), while the safety aspect of having strangers in the building was also a main issue (19%).

Other fairly common impacts cited (by more than 10% of the respondents to this question) were the mess/rubbish/damage created, the occupants not respecting the building/other residents, overuse or damage to common facilities, and drinking/partying/drug use by occupants (13%, 11%, 10% and 10% respectively).

Some (though relatively few) who indicated that they were impacted, went on to state that they had not been affected yet (7%), while others indicated that they supported short term letting (5%).

**Table 5. Type of personal impact created by short term letting**

Types of personal impact	Total (n=220) %	Tenant (n=62) %	Owner-occupier (n=145) %	Investor (n=21)* %
Creates noise	26	27	26	27
Allows strangers into the building/safety/no control	19	20	20	11
Creates mess/rubbish/damage	13	9	21	9
Short-term residents not respect the property/residents	11	10	14	4
Overuse/damage of facilities	10	6	16	9
Drinking/partying/drug use	10	13	10	-
Overuse/damage of common areas	8	4	11	13
Have not yet been affected	7	4	9	9
I support short-term letting / people should get over it	5	9	1	-
It is disruptive/like a hotel	4	3	5	-
Reduces sense of community/high turnover/full of strangers	3	1	5	-
I do not support it	3	2	4	-
Crowded car park/cars hit by short term letters	2	-	5	-
No control over number of people in apartments/overcrowding	2	1	3	2



Creates danger/broken glass/not family friendly	2	-	3	4
Other	7	6	5	24
Not sure	22	30	10	36

Q8. Does this impact you personally? Please explain how?

Base: Respondents personally impacted by short-term letting (n=220).

\* CAUTION: small base size (n<40).

### 5.3 Personal use of short term letting platforms

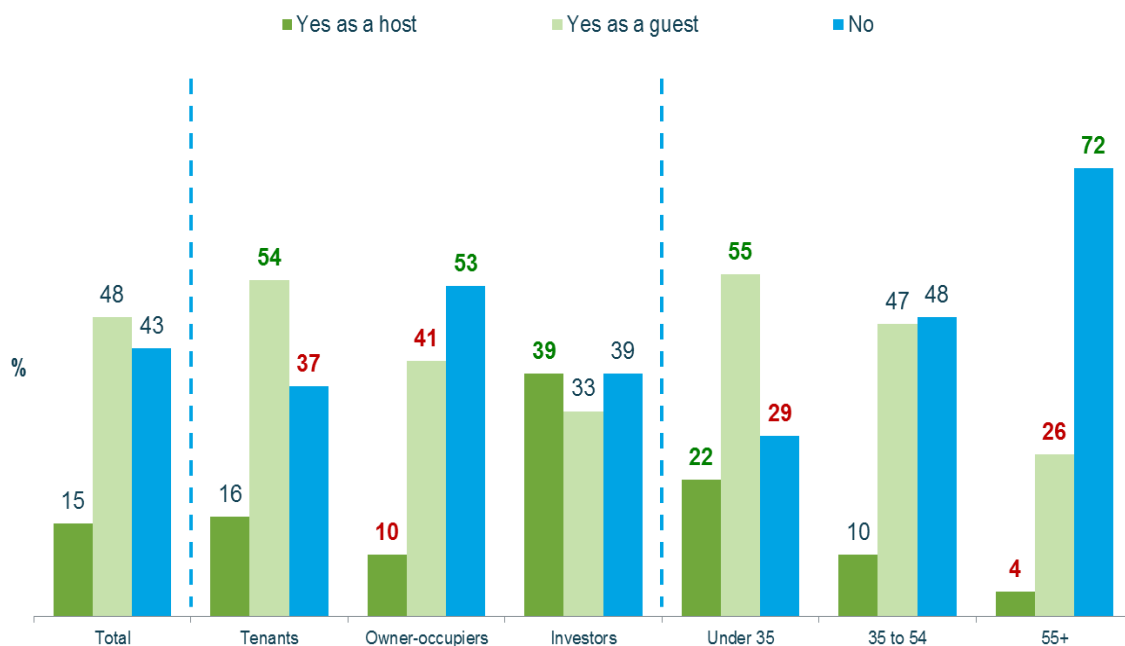
All respondents were asked to indicate if (and how) they ever used any form of short term letting platform (Figure 6).

In total, 57% of all respondents indicated that they had used a short term letting platform. Almost half (48%) had used them as a guest, while 15% had used a platform as a host. Some respondents (6%) were users as both a guest and a host.

Respondents under the age of 35 were significantly more likely to be short term letting platform users (71% in total, 55% as a guest, and 22% as a host), as were Tenants (63% in total, 54% as a guest, and 16% as a host).

Respondents over the age of 55 were the least likely to have ever used a short term letting platform (28% had).

**Figure 6. Usage of short term letting platforms**



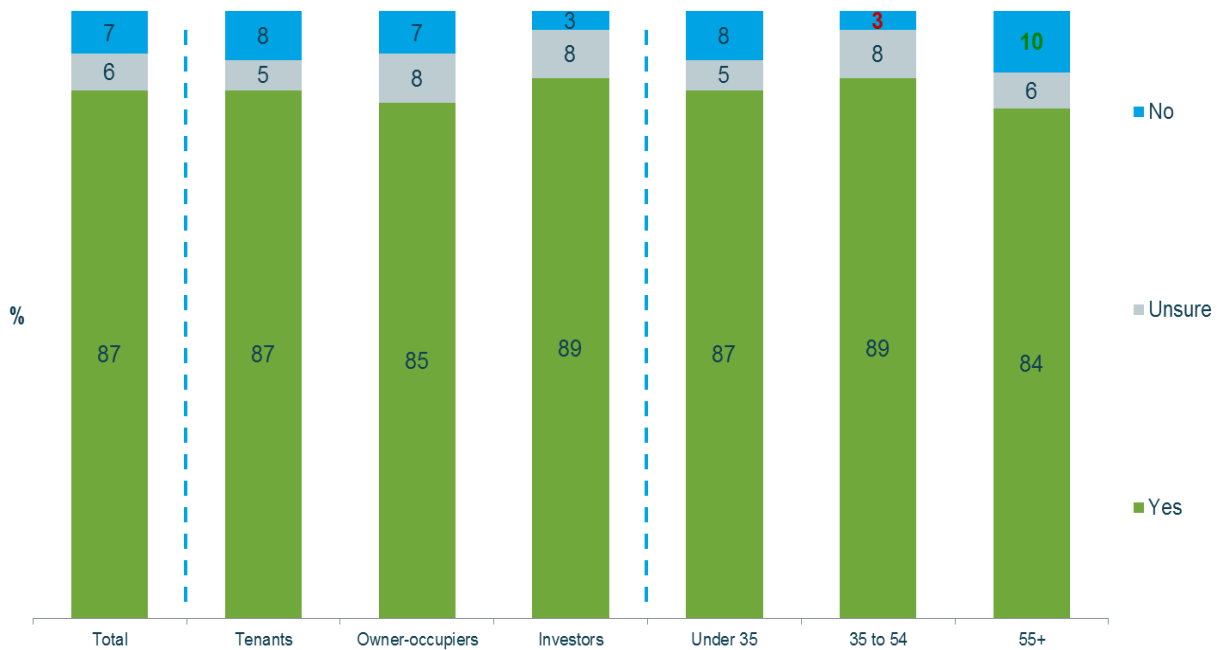
Q9. Have you ever used platforms like Airbnb & Stayz yourself? This is not restricted to Sydney

Base: All respondents (n=1001); Tenants (n=455); Owner-occupiers (n=486); Investors (n=72); Under 35 (n=321); 35 to 54 (n=322); 55+ (n=355).

Respondents who had used a short term letting platform (57% of all respondents, see Figure 6) were asked if they would use one again.

As shown in Figure 7, the large majority of platform users were likely to use them again (87%), with no real differences evident by sub-groups.

**Figure 7. Likelihood of using short term letting platforms again**



Q10. Would you use it again?

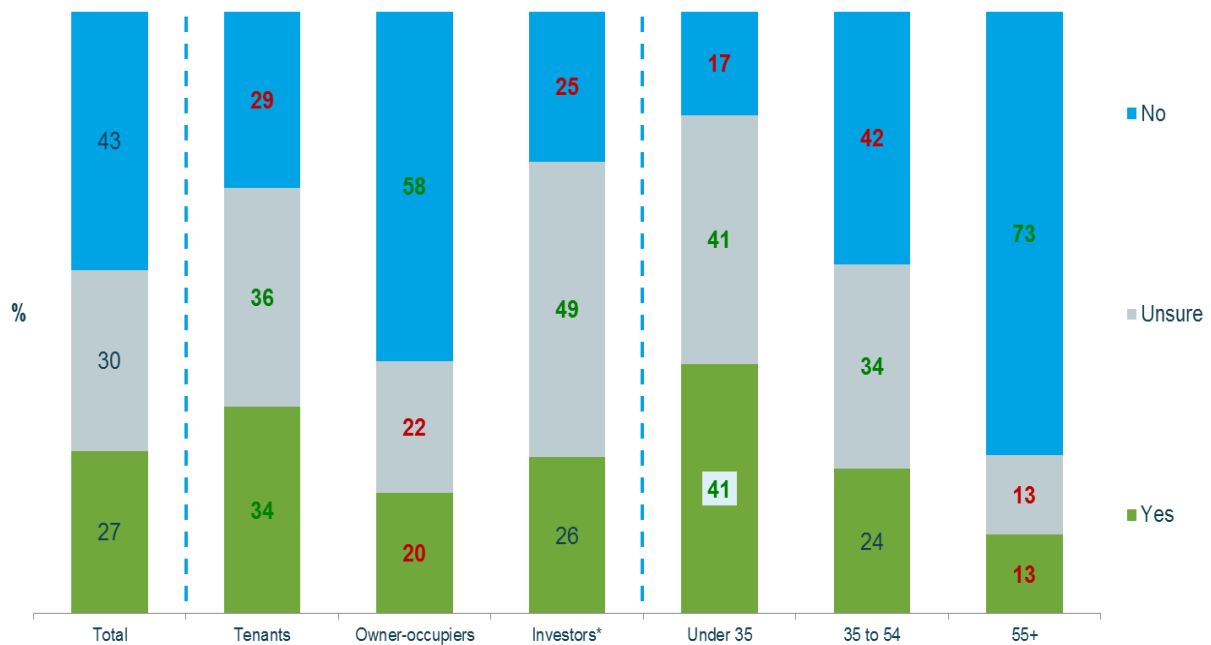
Base: Respondents who had used short-term letting (n=495); Tenants (n=267); Owner-occupiers (n=193); Investors (n=41); Under 35 (n=227); 35 to 54 (n=167); 55+ (n=100).

Respondents who had not used a short term letting platform (43% of all respondents, see Figure 6) were asked if they were likely to use one in the future.

As shown in Figure 8, less than three in ten of the non-users indicated that they were likely to use a platform in the future (27%).

Owner-occupiers, and those over the age of 55 were the most likely to indicate that they would not use a short term letting platform in the future (58% and 73% respectively).

**Figure 8. Likelihood of using short term letting platforms in the future**



Q11. Are you likely to use one of these platforms in the future?

Base: Respondents who had not used short term letting (n=506); Tenants (n=188); Owner-occupiers (n=293); Investors (n=31\*); Under 35 (n=94); 35 to 54 (n=155); 55+ (n=255).

\* CAUTION: small base size (n<40)

## 6. Opinions of Short Term Letting

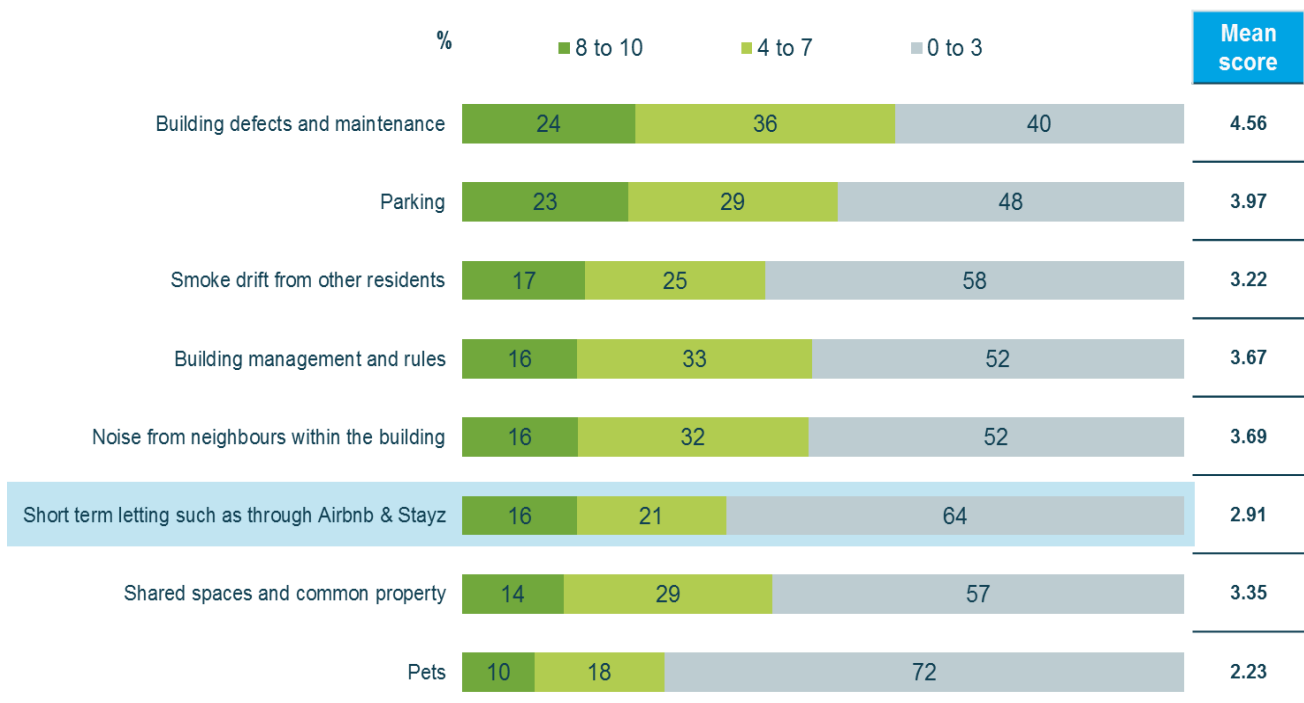
### 6.1 Issues of personal importance

All respondents were presented with a range of different potential strata living issues, and were asked to rate each of them on a scale from 0 to 10 in terms of how much of a personal issue they were to them. Results have been grouped into the categories of 0 to 3 ratings (where it is effectively a 'non-issue'), 4 to 7 (where it is a minor issue), and 8 to 10 (where it is potentially an issue of note) (see Figure 9).

In relation to the potential issues presented, building defects and maintenance was seen as the biggest issue to respondents (24% gave it a rating of 8 or more out of 10), while parking was at a similar level (23% gave it a rating of 8 or more out of 10).

Smoke drift, building management, noise, and short term letting were at similar levels in terms of the 8+ ratings – yet of these, short term letting had the highest proportion indicating that it was a non-issue to them (64% gave a rating of 0 to 3 out of 10).

**Figure 9. Issues of personal importance**



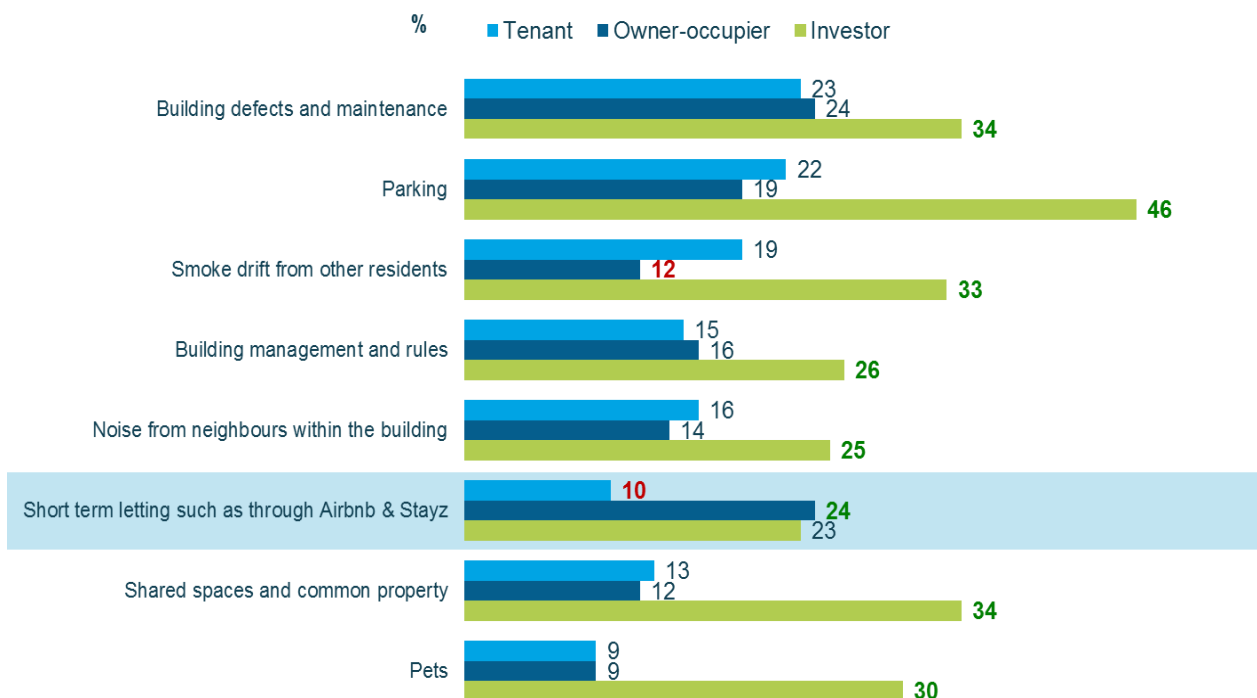
Q4. You will now be presented with some issues that other people have raised about living in strata buildings. For each one, please tell me the extent that you personally find it an issue on a scale from 0 to 10, where 0 is "not an issue at all", and 10 is "a major issue"

Base: All respondents (n=1001).

In examining the potential strata living issues by respondent type (Figure 10), it can be seen that Investors were likely to see almost all as important issues to them.

Along with building defects, short term letting was effectively the most important issue for Owner-occupiers (with 24% giving both a rating of 8+ out of 10), while amongst Tenants only 10% gave short term letting a rating of 8 or more out of 10.

**Figure 10. Issues of personal importance - by respondent type**



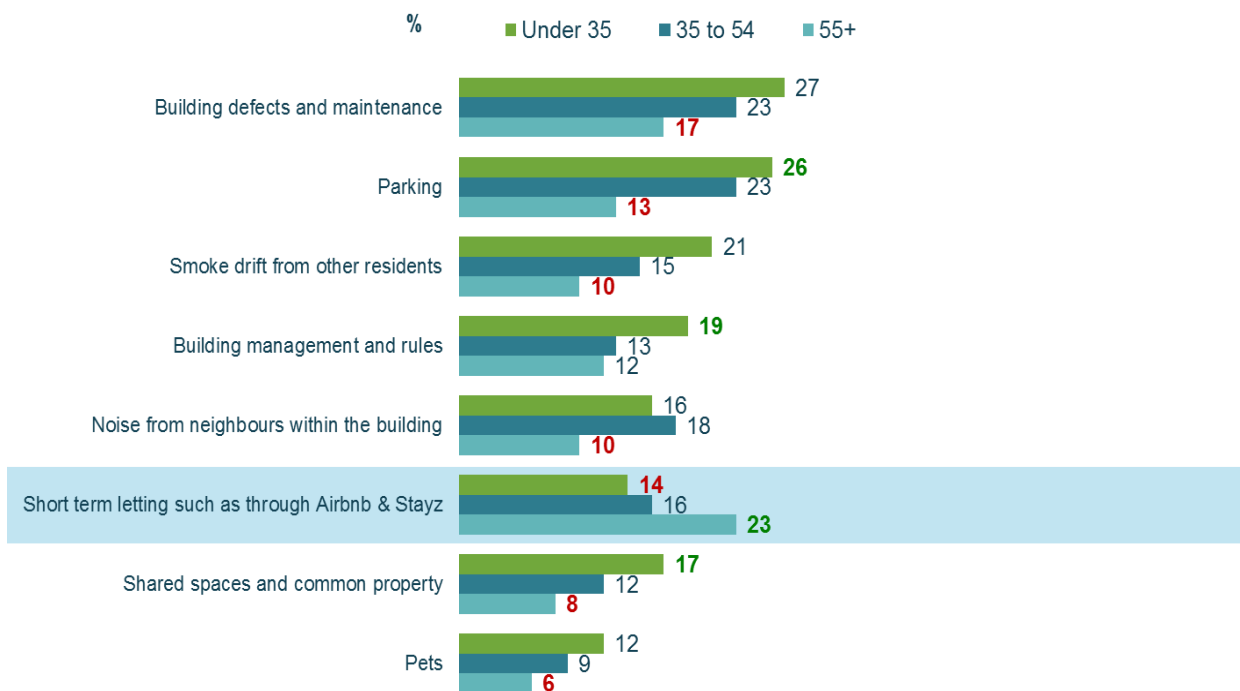
Q4. You will now be presented with some issues that other people have raised about living in strata buildings. For each one, please tell me the extent that you personally find it an issue on a scale from 0 to 10, where 0 is "not an issue at all", and 10 is "a major issue"

Base: All respondents (n=1001).

In examining the potential strata living issues by the age group of respondents (Figure 11), some significant differences can be seen.

Those aged under 35 were most likely to give a high (8+) rating to building defects and parking (27% and 26% respectively), while amongst those aged 55 or more were most likely to give an 8 or more to short term letting (23%).

**Figure 11. Issues of personal importance - by age group**



Q4. You will now be presented with some issues that other people have raised about living in strata buildings. For each one, please tell me the extent that you personally find it an issue on a scale from 0 to 10, where 0 is "not an issue at all", and 10 is "a major issue"

Base: All respondents (n=1001).

## 6.2 Reasons for short term letting being seen as an issue

Respondents who gave short term letting a rating of 7 or more out of 10 were asked to reveal why they felt short term letting was an issues for them.

The most common reason for indicating that short term letting was an issue related to safety – with 25% indicating that it allows strangers into the building. Noise and respect (for residents and property) were the other main reasons to emerge (19% and 18% respectively).

Almost a quarter of those who had indicated that short term letting was an issue to them to some degree (by rating it with a 7 or more out of 10) were unable to indicate why they felt this way (23%).

**Table 6. Reasons for short term letting being an issue**

Issues with short term letting	Total (n=220) %	Tenant (n=62) %	Owner-occupier (n=145) %	Investor (n=21)* %
Allows strangers into the building/safety/no control	25	17	31	11
Creates noise	19	12	26	9
Short-term residents do not respect the property/residents	18	9	24	17
Overuse/damage of facilities	12	1	19	11
It is disruptive/like a hotel	11	12	10	4
Overuse/damage of common areas	10	2	14	11
Creates mess/rubbish/damage	10	7	13	4
Drinking/partying/drug use	9	7	12	-
Reduces sense of community/high turnover/full of strangers	8	6	10	-
No control over number of people in apartments/overcrowding	8	2	12	8
I know it violates the rules/by-laws	5	-	10	-
Hard to track down people who did damage while short-term letting / no accountability	3	1	4	-
There are no regulations/we have no power as residents	2	-	4	4
Feel like there is no one to complain to	2	2	3	-



I do not support it	2	-	1	13
I support short term letting / people should get over it	2	4	1	-
May increase rents	2	4	-	-
Increases insurance cost/introduces liability issues	1	-	2	-
Creates danger/broken glass/not family friendly	1	-	2	-
Other	6	8	7	-
Don't know	23	40	11	51

Q5. You indicated that short term letting can be an issue in your building. Can you please explain why it is an issue there?

Base: Respondents who gave short-term letting a score of 7-10 (n=220).

\* CAUTION: small base size (n<40)

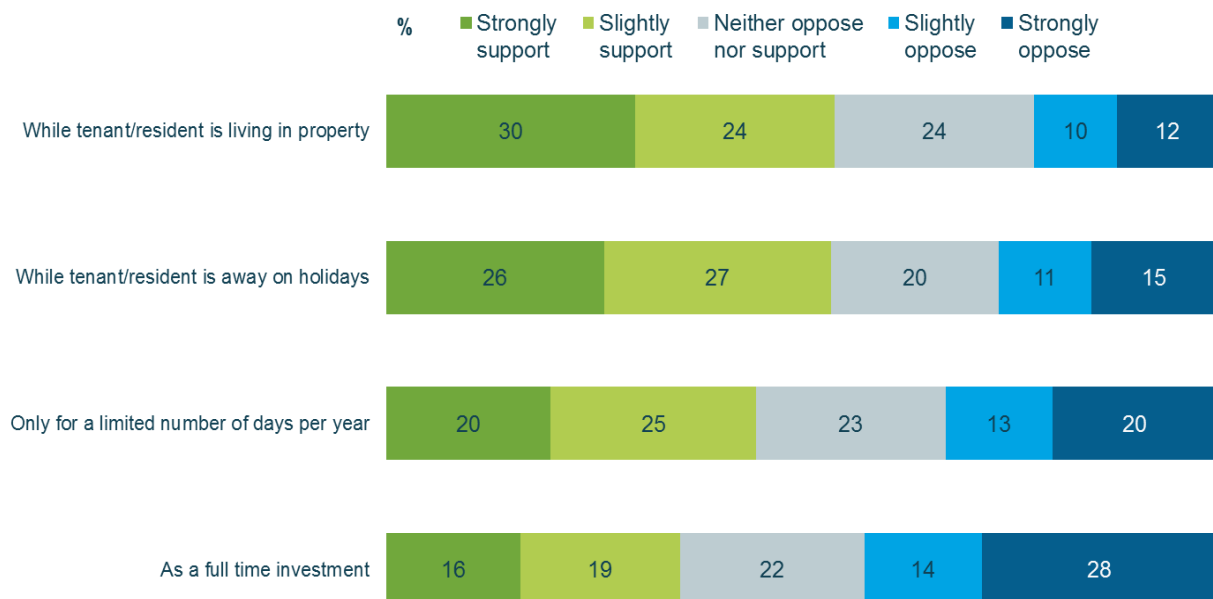
### 6.3 Support for short term letting

All respondents were presented with different versions/forms of short term letting arrangements, and were asked to indicate their degree of support or opposition for each (Figure 12).

The majority of respondents indicated support for short term letting where the tenant or resident is living in the property (54% support vs. 22% opposed), as well as while the tenant or resident is away on holidays (53% support, vs. 26% opposed). Respondents were also more likely to support (than oppose) the situation where the property is available for short term letting for a limited number of days per year (45% support vs. 33% opposed).

However, respondents were more likely to oppose (than support) the situation where a property is made available as a full time investment for short term letting (42% opposed vs. 35% support).

**Figure 12. Support for various forms of short term letting**



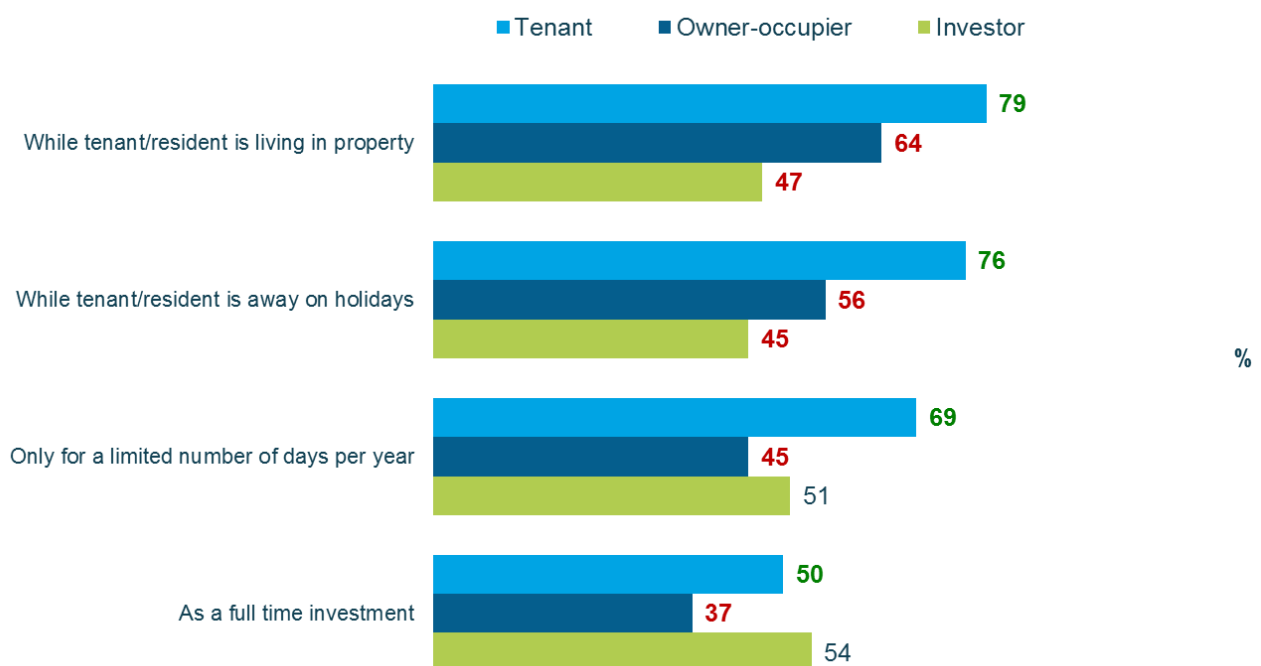
Q6. Now, thinking about short term letting in more detail (i.e. use of companies like Airbnb & Stayz), can you please indicate the extent to which you would support or oppose the following types of short-term letting in your building?

Base: All respondents (n=1001).

In examining support for various forms of short term letting by respondent type (Figure 13), it can be seen that, with the exception of the full time investment situation, Tenants were the most likely to support each short term letting scenario.

Owner-occupiers were significantly less likely (than all respondents) to support each option, while Investors were also significantly less likely to support short term letting while the tenant or resident is living in the property, and while the tenant or resident is away on holidays.

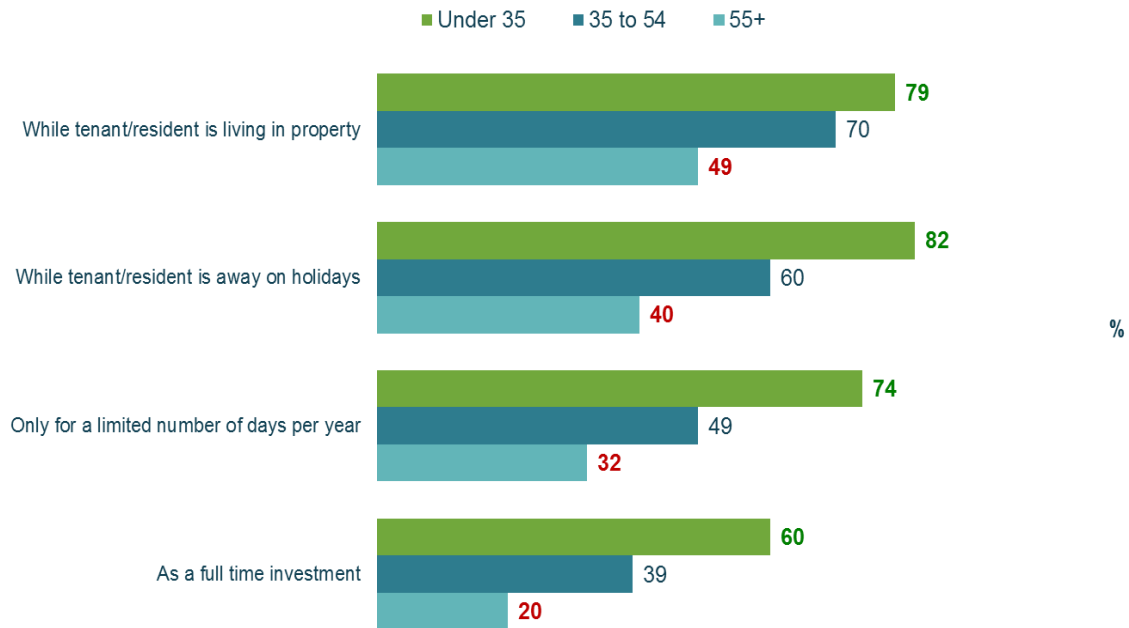
**Figure 13. Support for various forms of short term letting - by respondent type**



Q6. Now, thinking about short term letting in more detail (i.e. use of companies like Airbnb & Stayz), can you please indicate the extent to which you would support or oppose the following types of short-term letting in your building?  
Base: All respondents (n=1001).

In examining support for short term letting by age group categories (Figure 14), younger respondents were significantly more likely (than all respondents) to support each option, while older respondents were significantly less likely to indicate support.

**Figure 14. Support for various forms of short term letting - by age group**



Q6. Now, thinking about short term letting in more detail (i.e. use of companies like Airbnb & Stayz), can you please indicate the extent to which you would support or oppose the following types of short-term letting in your building?

Base: All respondents (n=1001).

## 6.4 Perceptions of strata committee powers

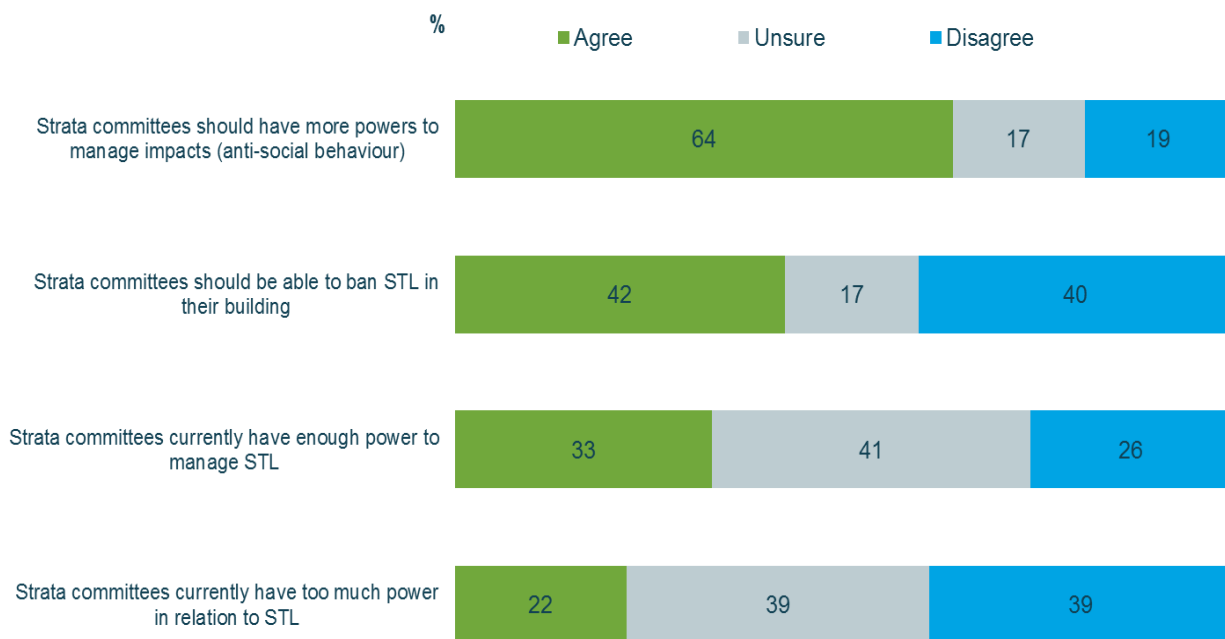
All respondents were presented with various statements in relation to strata committee powers, and were asked to indicate whether they personally agreed or disagreed with each (Figure 15).

Almost two thirds of all respondents agreed that strata committees should have more power to manage impacts such as anti-social behaviour (64%).

However, respondents were evenly split in relation to the idea that strata committees should be able to ban short term letting in their building (42% agreed and 40% disagreed).

There was slightly more agreement than disagreement that strata committees currently have enough power to manage short term letting (33% agreed and 26% disagreed), while more respondents disagreed than agreed that strata committees have too much power in relation to short term letting (22% agreed and 39% disagreed).

**Figure 15. Agreement with strata committee statements**

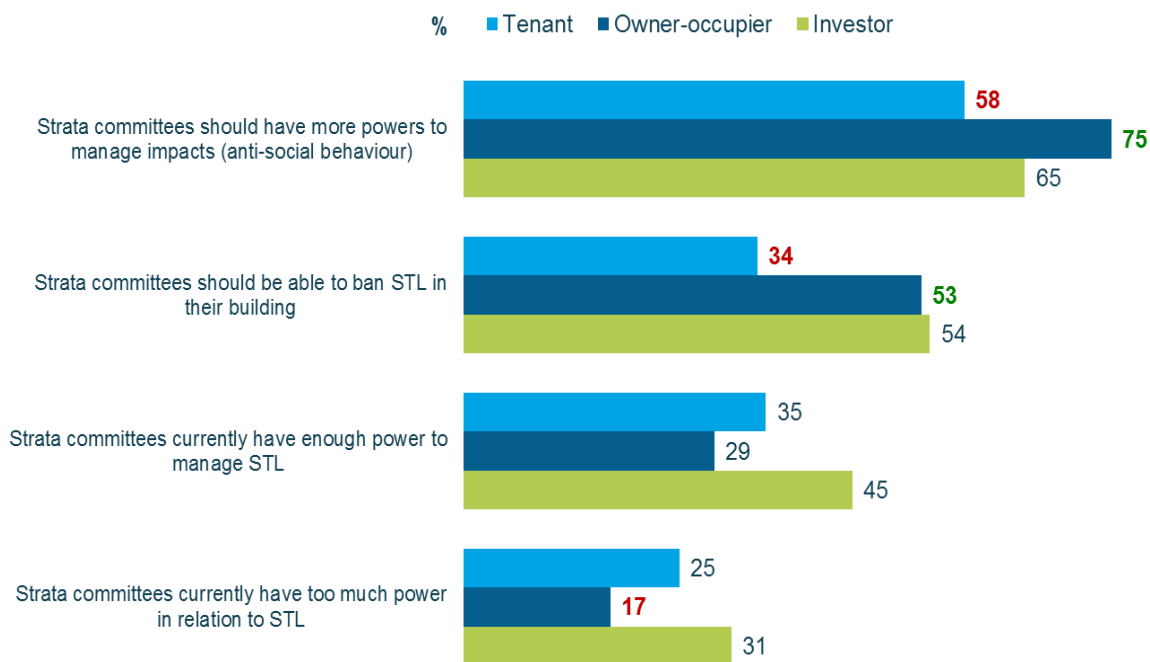


Q13. The NSW Government is considering whether strata committees should have additional powers to manage short-term letting for their own buildings. Do you agree or disagree with each of the following:

Base: All respondents (n=1001).

In examining perceptions of strata committee powers by respondent type (Figure 13), it can be seen that Tenants and Investors were the most likely to indicate that strata committees have enough or too much power at the moment, while Owner-occupiers and Investors were the most likely to indicate that strata committees should be able to ban short term letting, and that they should have more powers to allow them to manage anti-social behaviour.

**Figure 16. Agreement with strata committee statements – by respondent type**

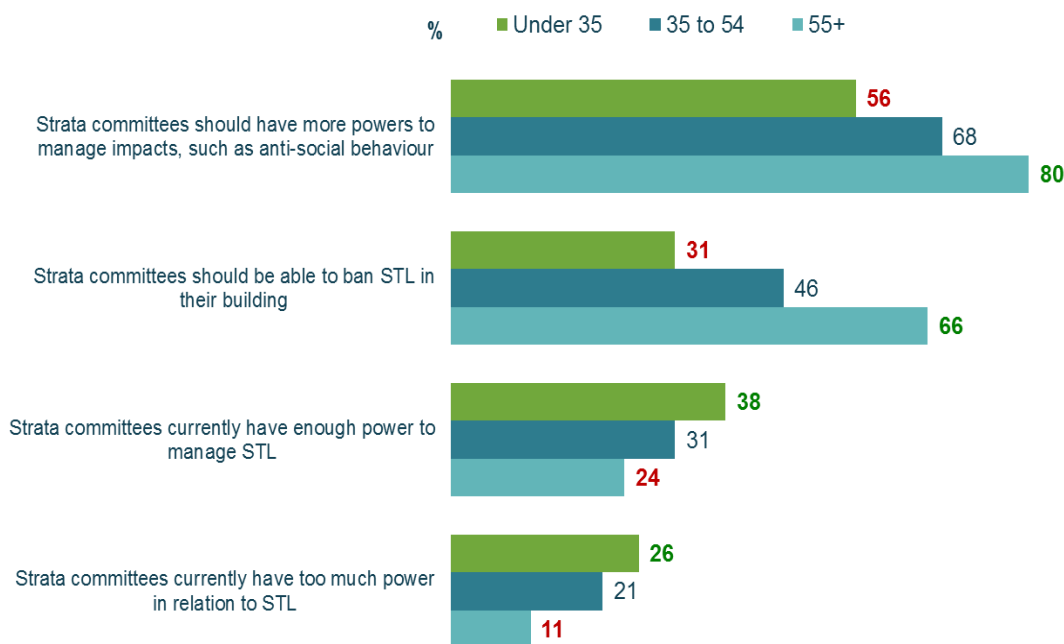


Q13. The NSW Government is considering whether strata committees should have additional powers to manage short-term letting for their own buildings. Do you agree or disagree with each of the following:

Base: All respondents (n=1001).

In examining perceptions of strata committee powers by age group categories (Figure 17), younger respondents were the most likely to indicate that strata committees have enough or too much power at the moment, while older respondents were the most likely to indicate that strata committees should be able to ban short term letting, and that they should have more powers to allow them to manage anti-social behaviour.

**Figure 17. Agreement with strata committee statements – by age group**



Q13. The NSW Government is considering whether strata committees should have additional powers to manage short-term letting for their own buildings. Do you agree or disagree with each of the following:  
Base: All respondents (n=1001).

## 7. Information & Advice Sources

All respondents were asked to reveal where they would turn to for information and advice on living in strata buildings (Table 7).

Overall, there was no clear single source for this type of information to emerge. In fact, many indicated that they would simply search for the information online (16% suggested that they would perform a Google or web search, and 10% indicated that they would look online).

However, Fair Trading NSW emerged as the most common individual response to this query (14%), while strata managing agents were the other more popular choice (13% indicated 'strata manager/agent', and 6% indicated 'strata company').

**Table 7. Information & advice sources**

Source of information	Total (n=1001) %
Google/web search	16
Fair Trading NSW	14
Strata manager/agent	13
Not sure	11
Council	10
Online	10
Building manager/website	8
Yes (no further information given)	7
Strata company	6
NSW government	4
Real Estate agent	4
Strata committee	3
Body corporate	3
Friends \ family \ word of mouth	2
Unknown agency/group	2
Reading relevant laws	2
Department of Housing	1



Strata community association	1
Owners corporation network	1
Tribunal/courts/ombudsman	1
Flat chat	1
Information posted within building	1
NCAT website	1
Tenants Rights	1
Solicitors	1
Other	1
No – don't know	48

Q12. Do you know where you can get information and advice on living in strata buildings?  
Base: All respondents (n=1001).

## 8. Summary of Findings

---

### Relationships

While owner-occupiers may be more 'connected' with their neighbours than Tenants are (in terms of being familiar with, and communicating with them), there were no real differences in terms of the overall perceived relationship between the various sub-groups.

- Around three quarters of all respondents indicated that they had positive relationships with neighbours, with few having negative relationships.

### Incidence of Short Term Letting Occurring

More than a third of all respondents believed that STL occurred in their building (37%), while a similar proportion did not think it occurred (36%). The remainder were unsure of the situation (27%).

However, where it did occur, not all felt personally impacted by it.

- 52% did feel a personal impact (which equates to 19% of the total respondent base);
- Noise, security, and damage to facilities/common areas were the greatest areas of concern expressed in relation to short term letting.

### Awareness & Usage of Short Term Letting Platforms

Over half of all respondents were users of STL platforms (57%, with 15% as hosts).

- The large majority of STL platform users indicated that they will use them again (87%, which equates to 50% of all respondents).
- Amongst the non-users, relatively few felt that they would use STL in the future (27%, which equates to 12% of all respondents).

### Perceptions of Short Term Letting

Overall, Short Term Letting was not seen to be as big an issue as most other strata building concerns such as building defects/maintenance and parking (based on 8+ ratings).

- Owner-occupiers were the most concerned about STL and it was one of their most important issues (24% rated it 8+ out of 10).
- STL was much less of an issue amongst tenants (10% rated it 8+ out of 10).

Of the options presented, the highest level of support was displayed in relation to STL when the resident remains in the property (i.e. use of a spare room).

- 54% support this overall (79% for Tenants, and 79% for those under the age of 35).

There was also majority support for short term letting while the tenant or resident is on holidays

- 53% supported this (76% of Tenants and 82% of those under 35 years of age).

While there was majority agreement (64%) that strata committees should have more power to manage impacts (such as anti-social behaviour), agreement that they should be able to ban STL was less definitive.

- 42% agreed, and 40% disagreed with this idea.

### **Information & Advice**

If residents were in need of information or advice in relation to strata living they would most likely undertake a search for it on the internet.

## Appendix – Questionnaire

## Appendix. Questionnaire

**Client: City of Sydney**

**Job Number: 9407-FX**

**Sample Description: N=1000**

Good morning/afternoon, I'm ..... from Woolcott Research calling on behalf of the City of Sydney. We are conducting a short survey in relation to apartment living within the City of Sydney Local Government Area. It will only take up to 10 minutes to complete.

### SCREENER

S1. Firstly I need to ask if you live in or own a property in a strata building (e.g. an apartment building, townhouse or villa with multiple properties) in the City of Sydney Local Government Area? *NOTE: This includes those who own an investment property in the City but don't live there.*

Yes	1	<b>CONTINUE</b>
No	2	<b>THANK &amp; TERMINATE</b>

S2. And are you... **READ OUT. MULTIPLE RESPONSE POSSIBLE**

A tenant	1
An owner occupier	2
An investor (of a property in the City of Sydney)	3

S3. **IF CODE 2 AT S2, Ask:** Is the building classified as Company or Community Title?

Yes, it is	1	<b>THANK &amp; TERMINATE</b>
No, it isn't	2	<b>CONTINUE</b>
Don't know/Not sure	3	<b>CONTINUE</b>

### SURVEY

**IF INVESTOR (CODE 3 AT S2), GO TO Q4, ALL OTHERS CONTINUE**

1. How well would you say that you know your neighbours in the building you live in? Would it be.... **READ OUT**

Very well	1
Quite well	2
Not particularly well	3
Not at all	4

2. And how often do you communicate with your neighbours? Would it be.... **READ OUT**

- |                      |   |
|----------------------|---|
| Every day            | 1 |
| Several times a week | 2 |
| Once a week or less  | 3 |
| Never                | 4 |

3. And in general, would you say that your relationship with your neighbours is... **READ OUT**

- |          |   |
|----------|---|
| Positive | 1 |
| Negative | 2 |
| Mixed    | 3 |

**INVESTORS ONLY:** For the remaining questions, please answer in relation to your investment property in the City of Sydney area.

4. Now, I am going to read out some issues that other people have raised about living in strata buildings. For each one, please tell me the extent that you personally find it an issue on a scale from 0 to 10, where 0 is “not an issue at all”, and 10 is “a major issue” **ROTATE ORDER**

**INVESTORS:** I am going to read out some issues that other people have raised about living in strata buildings. For each one, please tell me the extent that you feel it is an issue for your investment property on a scale from 0 to 10, where 0 is “not an issue at all”, and 10 is “a major issue” **ROTATE ORDER**

	0	1	2	3	4	5	6	7	8	9	10
Building management and rules	0	1	2	3	4	5	6	7	8	9	10
Building defects and maintenance	0	1	2	3	4	5	6	7	8	9	10
Shared spaces and common property	0	1	2	3	4	5	6	7	8	9	10
Short term letting such as through Airbnb & Stayz	0	1	2	3	4	5	6	7	8	9	10
Parking	0	1	2	3	4	5	6	7	8	9	10
Noise from neighbours within the building	0	1	2	3	4	5	6	7	8	9	10
Smoke drift from other residents	0	1	2	3	4	5	6	7	8	9	10
Pets	0	1	2	3	4	5	6	7	8	9	10

5. **[IF CODES 7-10 FOR SHORT TERM LETTING]** You indicated that short term letting can be an issue in your building. Can you please explain why it is an issue there? **PROBE FULLY.** Why else?

---



---



---

6. Now, thinking about short term letting in more detail (i.e. use of companies like Airbnb & Stayz), can you please indicate whether you support or oppose the following types of short-term letting in your building? ... **READ OUT. ROTATE ORDER.** And would that be slightly or strongly?

	Strongly oppose	Slightly oppose	Neither oppose no support	Slightly support	Strongly support
While tenant/resident is away on holidays	1	2	3	4	5
While tenant/resident is living in property (i.e. renting out a spare room)	1	2	3	4	5
As a full-time investment	1	2	3	4	5
Only for a limited number of days a year (e.g. 90 per year)	1	2	3	4	5

7. Does any short term letting take place in your building that you are aware of?

**INVESTORS:** As far as you are aware, does any short term letting take place in the building your investment property is in?

- |            |   |                   |
|------------|---|-------------------|
| Yes        | 1 | <b>CONTINUE</b>   |
| No         | 2 | <b>SKIP TO Q9</b> |
| Don't know | 3 | <b>SKIP TO Q9</b> |

8. Does this impact you personally?

- |                                |   |
|--------------------------------|---|
| Yes (please explain how) _____ | 1 |
| No                             | 2 |

9. Have you ever used platforms like Airbnb & Stayz yourself? **MULTIPLE RESPONSE POSSIBLE.**

(NOTE: this is **not** restricted to Sydney)

- |  |   |                |
|--|---|----------------|
| Yes – as an owner letting out property | 1 | <b>ASK Q10</b> |
| Yes – as a guest staying in a property | 2 | <b>ASK Q10</b> |
| No                                     | 3 | <b>ASK Q11</b> |

10. **IF CODES 1 or 2 AT Q9, ASK:** Would you use it again?

- |        |   |
|--------|---|
| Yes    | 1 |
| No     | 2 |
| Unsure | 3 |

11. **IF CODE 3 AT Q9, ASK:** Are you likely to use one of these platforms in the future?

- |        |   |
|--------|---|
| Yes    | 1 |
| No     | 2 |
| Unsure | 3 |

12. Do you know where you can get information and advice on living in strata buildings?

Yes (please specify) \_\_\_\_\_ 1  
No 2

13. The NSW Government is considering whether strata committees should have additional powers to manage short-term letting for their own buildings. Do you agree or disagree with each of the following: **READ OUT. ROTATE ORDER.**

**IF NEEDED:** A strata committee is made up of elected representatives of the building, and they oversee the running of the building.

Strata committees currently have enough power to manage short-term letting in their building	Agree	Disagree	Unsure
Strata committees should have more powers to manage impacts, such as anti-social behaviour	Agree	Disagree	Unsure
Strata committees currently have too much power in relation to short term letting	Agree	Disagree	Unsure
Strata committees should be able to ban short-term letting in their building	Agree	Disagree	Unsure

## DEMOGRAPHICS

D1. **RECORD GENDER:** Male 1 Female 2

D2. And which age bracket do you fall into?

18-24 years 1  
25-34 years 2  
35-54 years 3  
55-74 years 4  
75 years or older 5  
Refused **DNRO** 99

D3. What is the main language spoken in your household?

English 1  
Other (specify) \_\_\_\_\_ 2

D4. Can you please let me know which category best fits your total household income before tax?

Under \$20,000 per year 1  
\$20,000-\$39,999 per year 2  
\$40,000-\$59,999 per year 3  
\$60,000-\$99,999 per year 4



\$100,000-\$149,999 per year	5
\$150,000-\$199,999 per year	6
Over \$200,000 per year	7
Refused <b>DNRO</b>	99

D5. **IF CODE 1 AT Q7, ASK:** The City of Sydney is interested in knowing what the zoning is for buildings where short term letting is occurring. In order to work this out can you please tell me your street number, street name, and suburb. I do **not** need your apartment number, and these results will **not** be used for any other purposes.

**INVESTORS:** The City of Sydney is interested in knowing what the zoning is for buildings where short term letting is occurring. In order to work this out can you please tell me the street number, street name, and suburb of your investment property. I do not need an apartment number, and these results will not be used for any other purposes.

NUMBER: \_\_\_\_\_  
NAME: \_\_\_\_\_  
SUBURB: \_\_\_\_\_  
NOT PROVIDED:

Thank you for your time.