

Where does an overnight visitor  
sleep in your community?

# College of Charleston

Riley Center for Livable Communities and the Office of Tourism Analysis

Prepared by Brumby McLeod

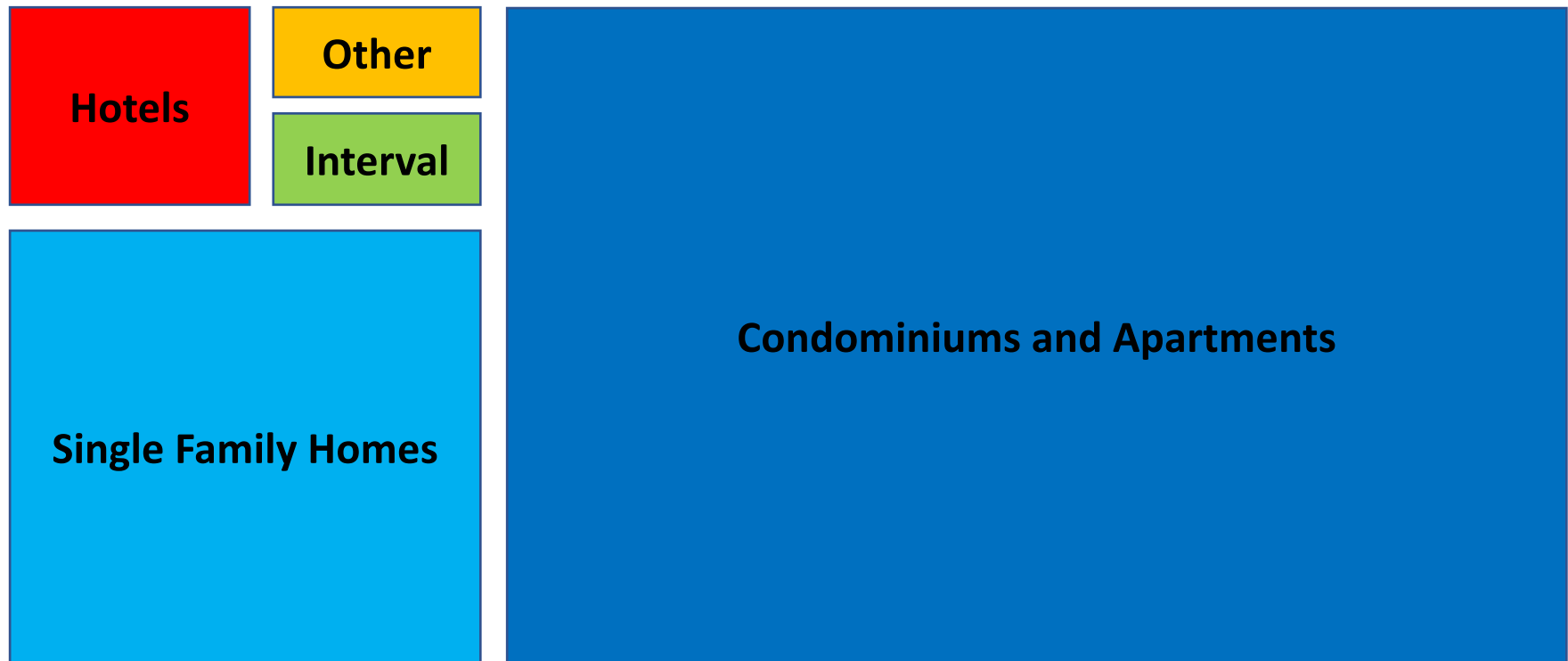
# The Convergence of Housing & Tourism

Sources of Transient Inventory

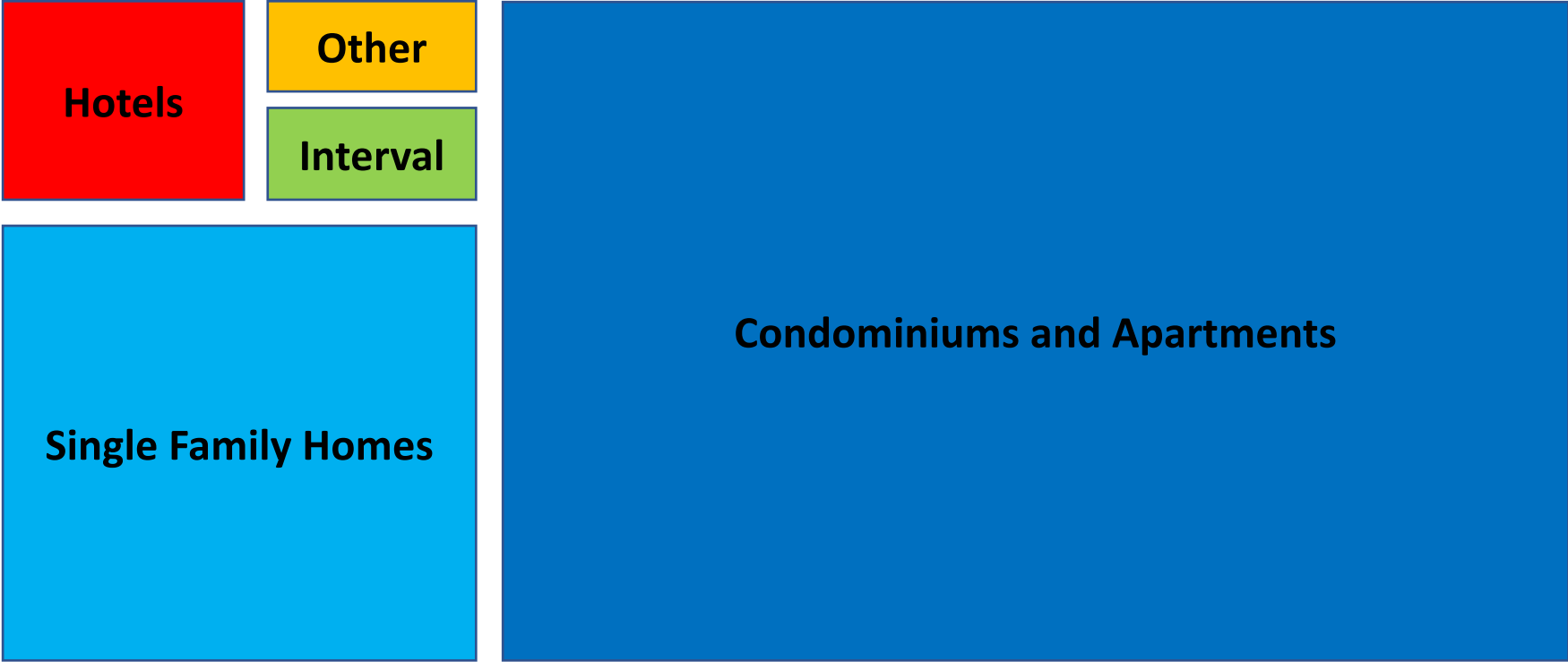
Where does a *paying* overnight visitor sleep in your community?

# Sources of Transient Inventory

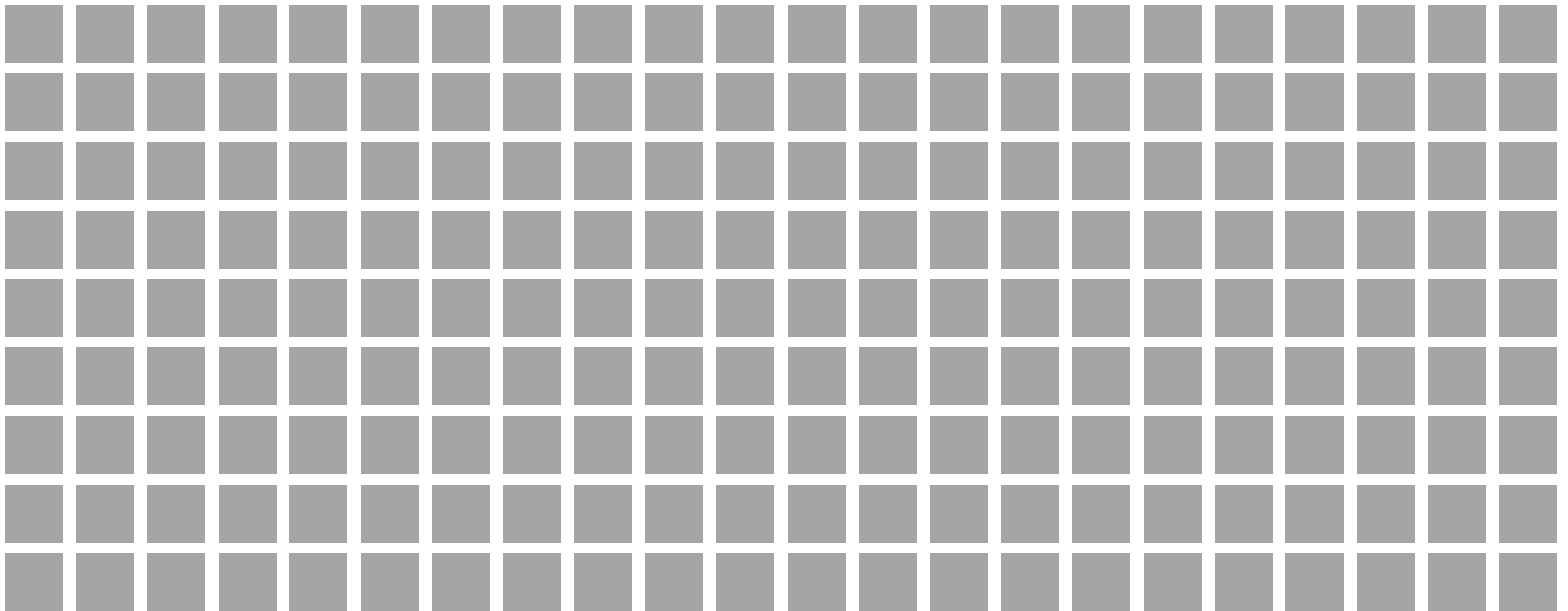
Residential housing (single family homes, condominiums and apartments) represent the largest and most dynamic source of transient inventory in a destination.



# Sources of Transient Housing Inventory

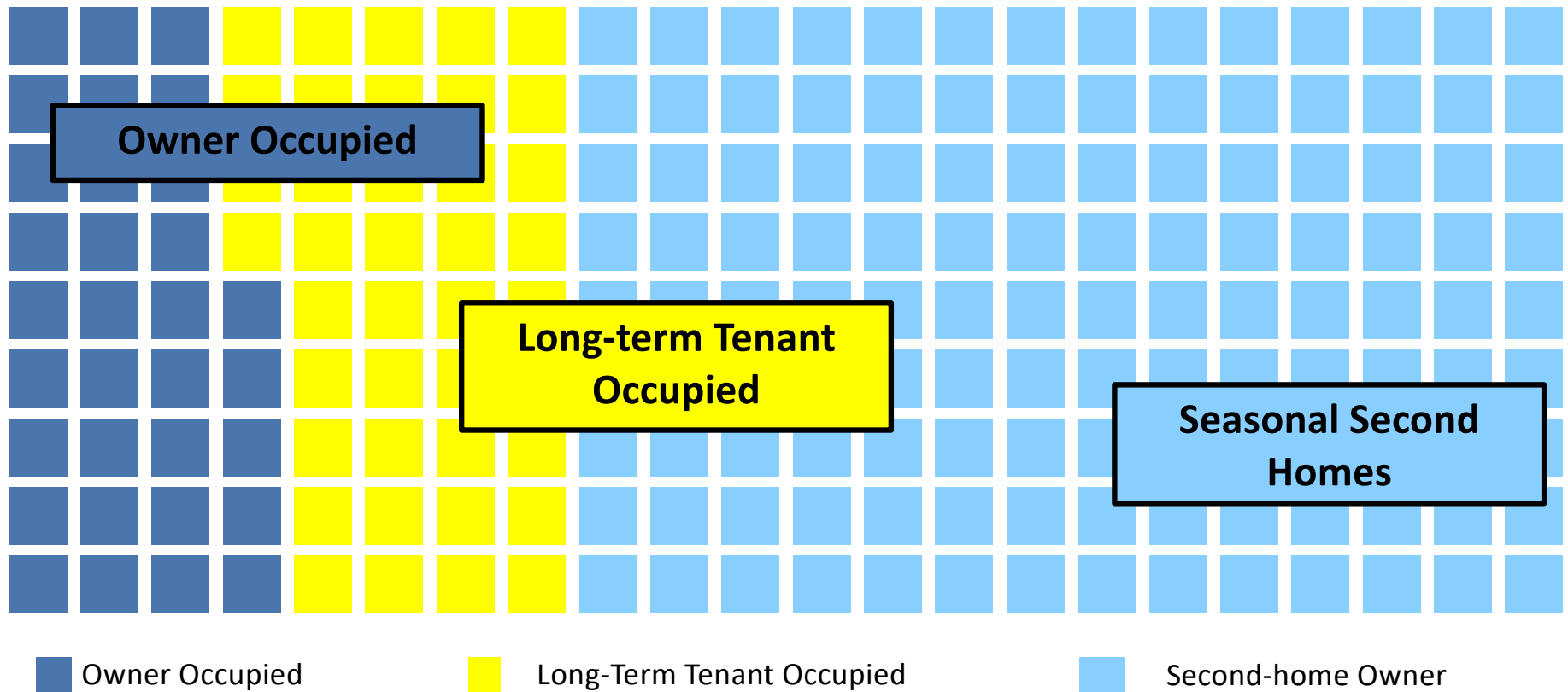


# Sources of Transient Housing Inventory



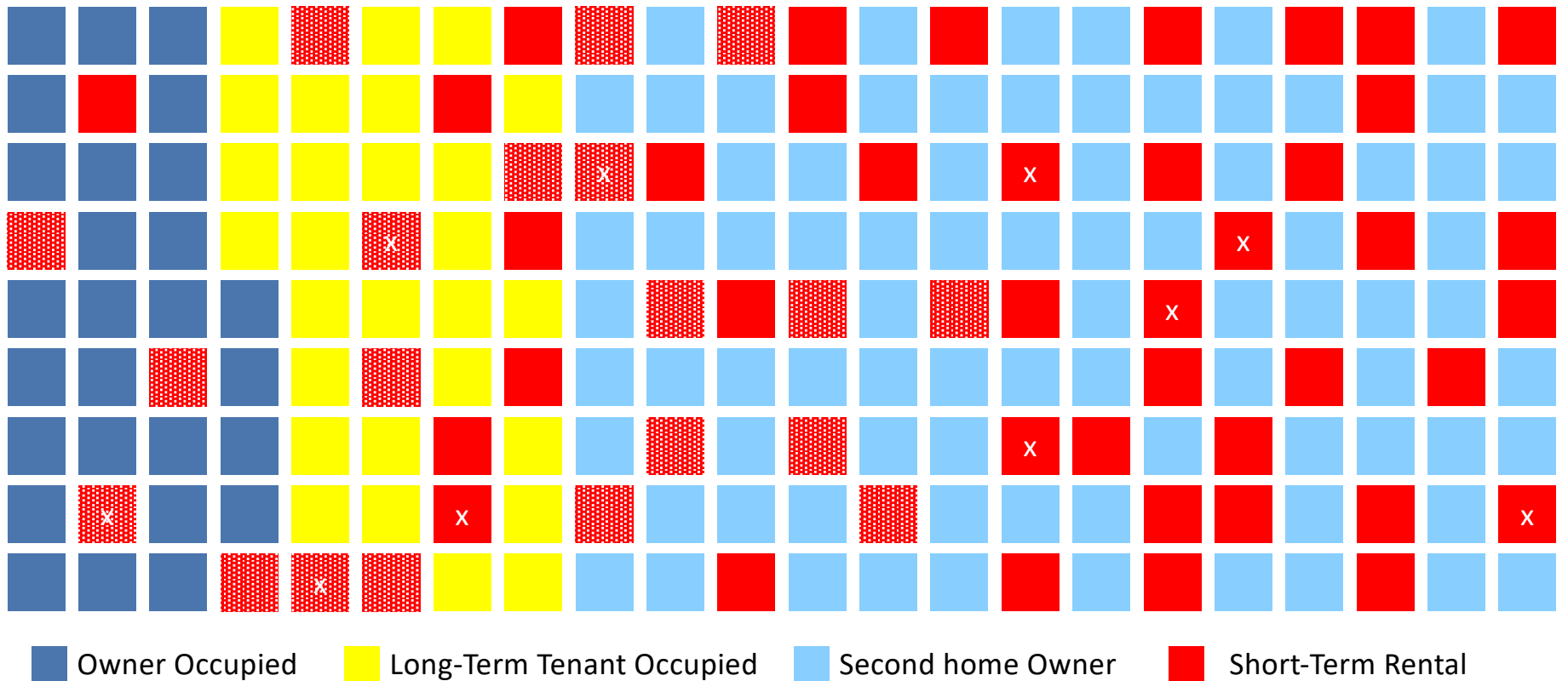
Blocks represent the total housing inventory in a destination, jurisdiction, neighborhood, or zone.

# What is the housing mix for your community?





# Where do short-term rentals come from in the housing mix?



# Sabbatical Research Study

Benchmark Study of Mountain Ski Towns

# Primary Goals of the Research

1. Comparative study of benchmark mountain destinations
2. Document requirements for operating residential nightly rentals;
3. Identify the current housing mix usage for these jurisdictions;
4. Develop a housing fact-base for the Town of Vail, CO using existing data sources.

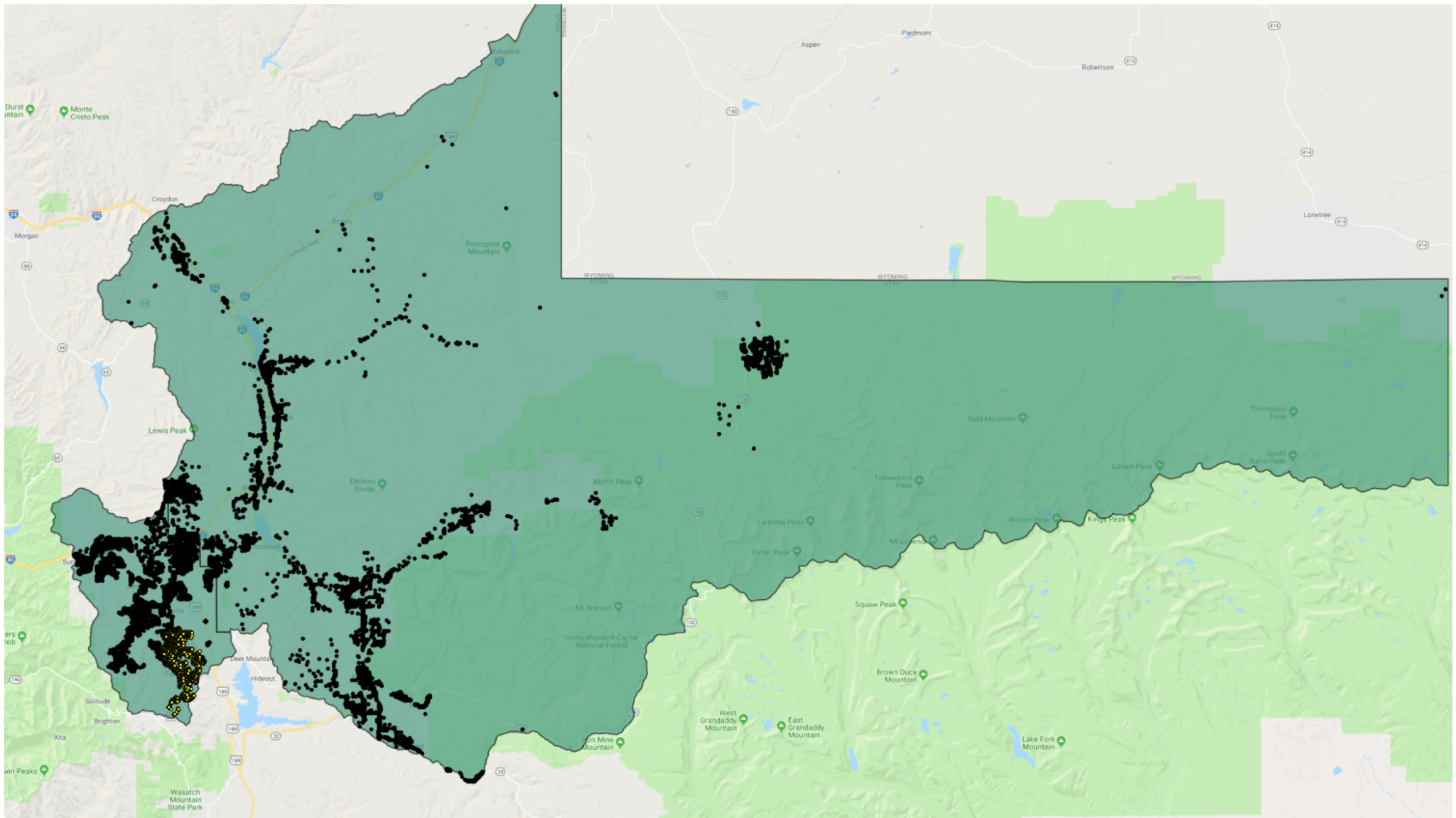
Municipality	Zoning	Life Safety	Public Notice	HOA	Tax	Business License	Permit	Education	Quality	Fees
City of Aspen				X	X	X	X	X		\$150 +
Town of Breckenridge	X				X	X	X			\$75 +
Town of Crested Butte	X				X	X				\$10 +
City of Durango	X	X	X		X	X	X	X		\$750 +
Town of Jackson	X	X	X	X	X	X		X		\$37 +
Park City Municipal Corporation	X	X			X	X		X		\$149 +
City of South Lake Tahoe	X	X	X		X	X	X	X		\$545 +
City of Steamboat Springs	X			X	X	X	X			\$500 +
Town of Telluride	X				X	X				\$187 +
Town of Vail					X	X			X	\$162 +

Municipality	Total Housing Units	Owner Occupied Units	Renter Occupied Units	Vacant Housing Units	Percentage of Vacant Units
<b>Town of Breckenridge</b>	7,146	1,017	937	5,128	71.7%
<b>Park City Municipal Corporation</b>	10,715	1,835	1,274	7,607	71.0%
<b>Town of Vail</b>	7,366	1,223	1,493	4,649	63.1%
<b>Town of Telluride</b>	2,145	464	616	1,065	49.6%
<b>City of Steamboat Springs</b>	10,308	3,386	2,036	4,886	47.4%
<b>City of Aspen</b>	6,364	1,899	1,816	2,649	41.6%
<b>City of South Lake Tahoe</b>	16,602	3,722	6,091	6,789	40.9%
<b>Town of Crested Butte</b>	1,090	372	353	344	31.6%
<b>Town of Jackson</b>	4,758	1,526	2,370	862	18.1%
<b>City of Durango</b>	8,482	3,560	4,046	876	10.3%

The most important need is to create a fact-based understanding of the housing mix usage in a market. This fact-based program could then be used to inform policy, ordinances and the desired use of housing while protecting and enforcing zoning, ordinances, and the unique vision of of the communities that make up a market.

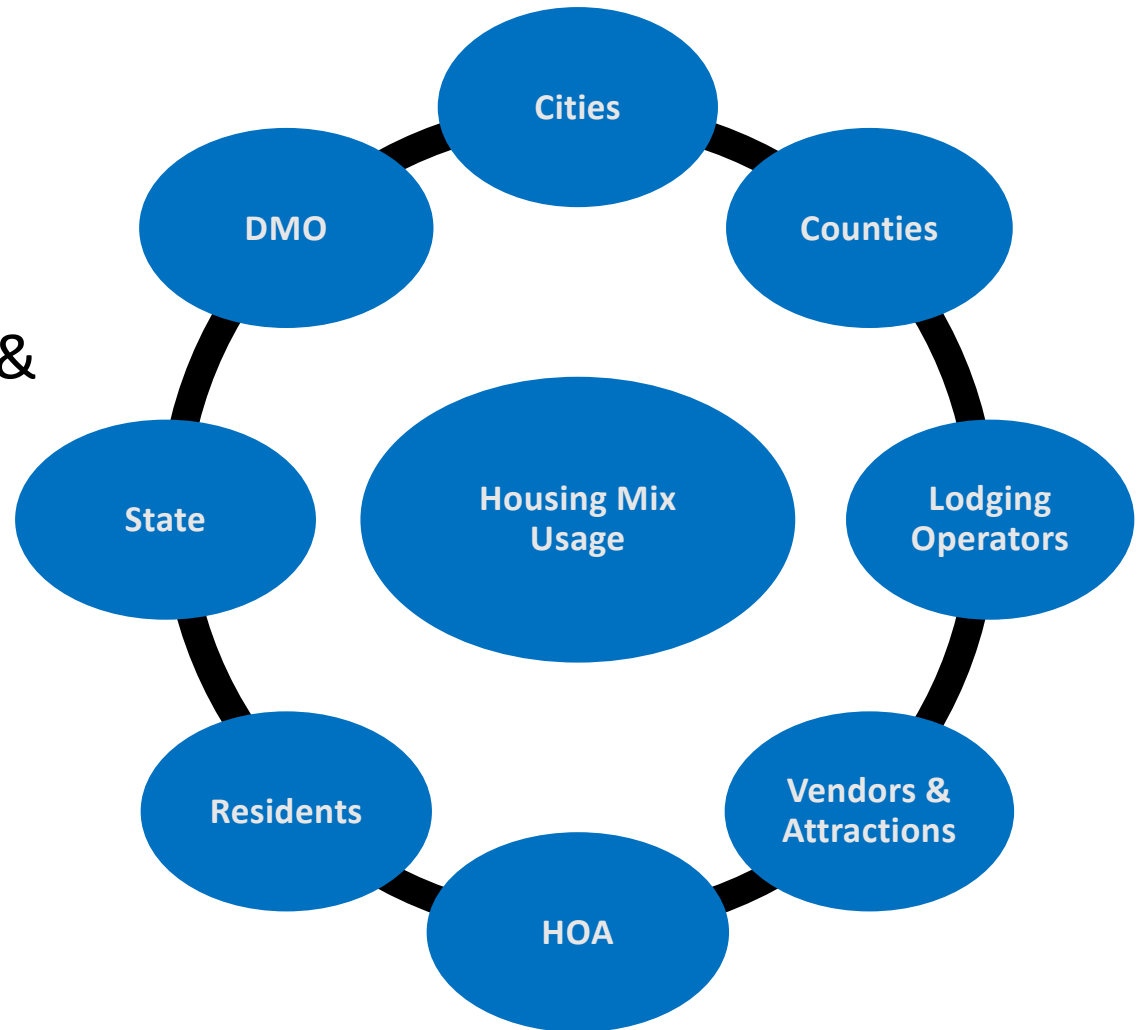
# A Collaborative Approach

The theoretical framework for addressing the convergence of housing and tourism.





# Shared Interest in the Convergence of Housing & Tourism



# Situation Analysis

City of Folly Beach, South Carolina

# City Council Concerns around STR Compliance

- Revenue about collecting appropriate taxes;
- Fairness concerns that properties were operating on a level playing field as it relates to business license and nightly rental registration requirements
- Resident concerns that owners were appropriately advertising and monitoring rentals.

# Zoning

- The City allows short term rentals in all zoning districts, with the goal of regulating their potential externalities (noise, trash, events, turtle lighting) rather than limiting their scope

# Short-term Rental Operating Requirements

- All rentals (short and long term) must have a business license: City contracts with Charleston County to renew; first license must be done in City Hall, renewals online through the County;
- Short term rentals must complete rental registration form – local contact, fee, info about the rental (parking, bedrooms, manager, etc);
- Must post rules and occupancy in the home

# The Case of Folly Beach

An application of the Collaborative Approach

# Overview of the Project

- Collaboration between City | County | Destination Marketing Office
  - City of Folly Beach
  - Charleston County
  - Charleston Area Convention & Visitors Bureau (CACVB)
- Administered as a grant with College of Charleston's
  - Riley Center for Livable Communities
  - Office of Tourism Analysis
- Focused on
  - Identification of all nightly rentals in the City (software solution called STR Helper)
  - Reconciliation of City registrations with County licenses
  - Assist in annual renewal process
  - Bring properties into compliance

# STR Helper

- [Dashboard](#)



### Validation Status

- N** New: 0 | [map](#) | [list](#) |
- C** Confirmed: 1507 | [map](#) | [list](#) |
- I** To Investigate: 5 | [map](#) | [list](#) |
- F** Not Found: 60 | [map](#) | [list](#) |
- O** Outside City: 6 | [map](#) | [list](#) |
- U** Unconfirmable: | [map](#) | [list](#) |

Needs Validation

### Current Listing Compliance

- C** Compliant: [613](#)
- N** Not Compliant: [140](#)
- X** Exempt: [1](#)

View all three on [Map](#)

Compliant = Current License is 'Approved' or 'Approved (Expiring Soon)'

Not Compliant = No License or Current License is Expired. This will also include Properties whose only license is 'New', 'In Process', or 'Pending'

Not Compliant

[Print Non-Compliance Letters](#)

### License Status

- H** New: [0](#)
- H** In Process: [140](#)
- H** Pending: [29](#)
- C** Approved: [743](#)
- E** Expiring Soon: [0](#) | [Send Expiring Soon Emails](#) | [Print Expiring Soon Letters](#)
- H** Expired: [32](#) | [Send Expired Emails](#) | [Print Expired Letters](#)

[View on Map](#)

### Complaint Status

- New: [0](#)
- In Progress: [0](#)
- Resolved: [0](#)
- Unknown Property: [0](#)

Unresolved Complaints



## 2017 Year End License Status

<b>License Status</b>	<b>Count</b>
Fully Compliant	576
Missing Folly Beach Registration	114
Missing Charleston County Business License	68
No Compliance	117
<b>Total Properties</b>	<b>875</b>

# 2018 License Status

License Status		Count
Fully Compliant		743
Missing Folly Beach Registration		140
Missing Charleston County Business License		29
Outdated Compliance (Expired 12/31/17)	Expired BL & Reg.	10
	Expired Reg, No BL	2
	Expired BL, No Reg.	3
No Compliance (2017 or 2018)		106
<b>Total Properties</b>		<b>1,033</b>

As of August 12, 2018

# 2018 License Status & Listing Activity

License Status		No Active Listings	Active Listings	Total
Fully Compliant		131	612	743
Missing Folly Beach Registration		99	41	140
Missing Charleston County Business License		10	19	29
Outdated Compliance (Expired 12/31/17)	Expired BL & Reg.	0	10	10
	Expired Reg, No BL	0	2	2
	Expired BL, No Reg.	0	3	3
No Compliance (2017 or 2018)		40	66	106
<b>Total Properties</b>		<b>280</b>	<b>753</b>	<b>1,033</b>

As of August 12, 2018

# Future Project Focus

## City of Folly Beach

- Continue monitoring compliance
- Move to Online Registrations and Renewals
- Streamline Business Processes
- Incorporate new ordinance requirements
- Monitor the online ads
  - Prohibit Events
  - Occupancy Limits (2 per bed +2)
  - Listings with business license number

## My Research

- Collaborative Approach
- [Creation of Housing Fact-base](#)

# Thoughts & Discussion