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Hosts Polling

Prepared for :



June 2025

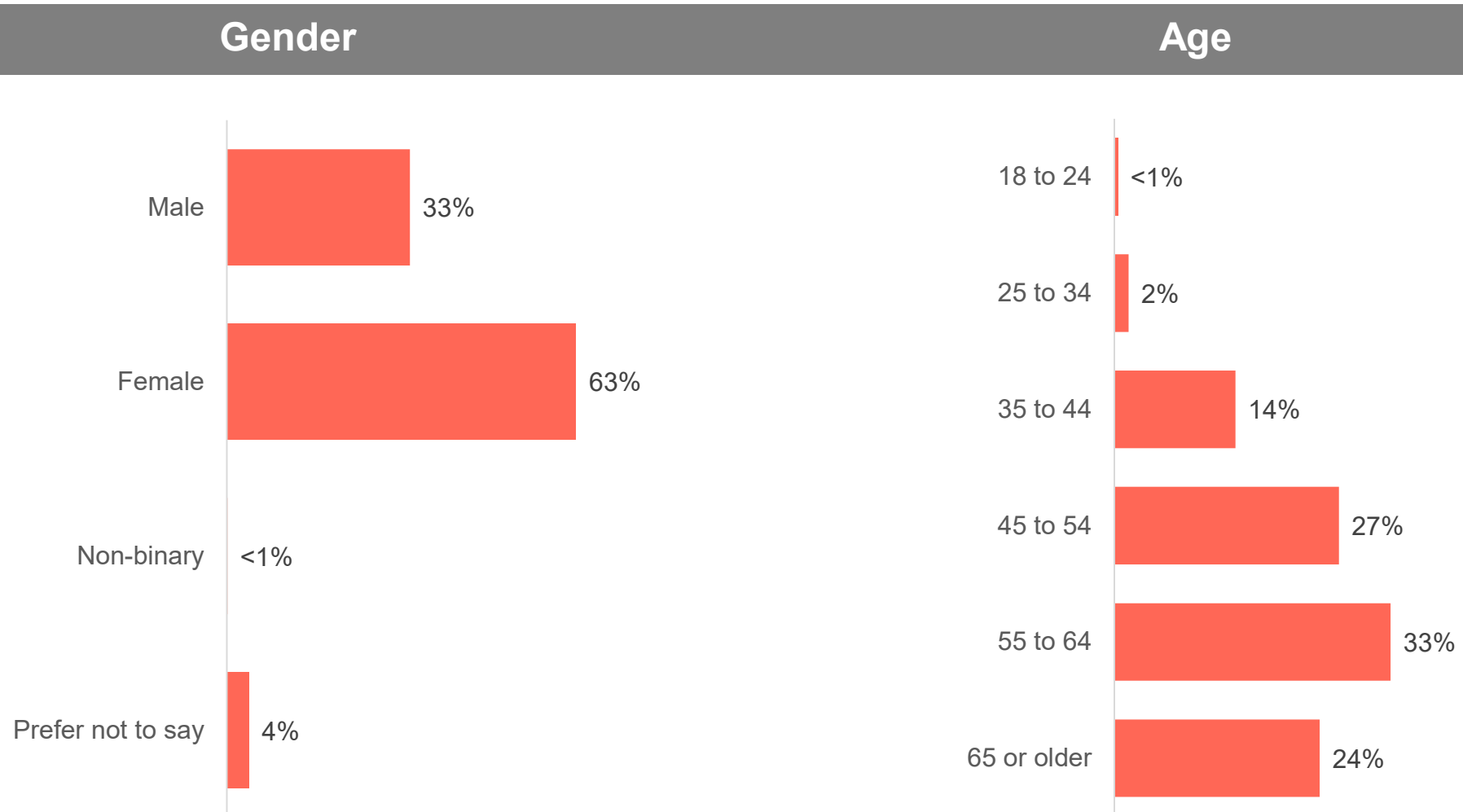
Methodology

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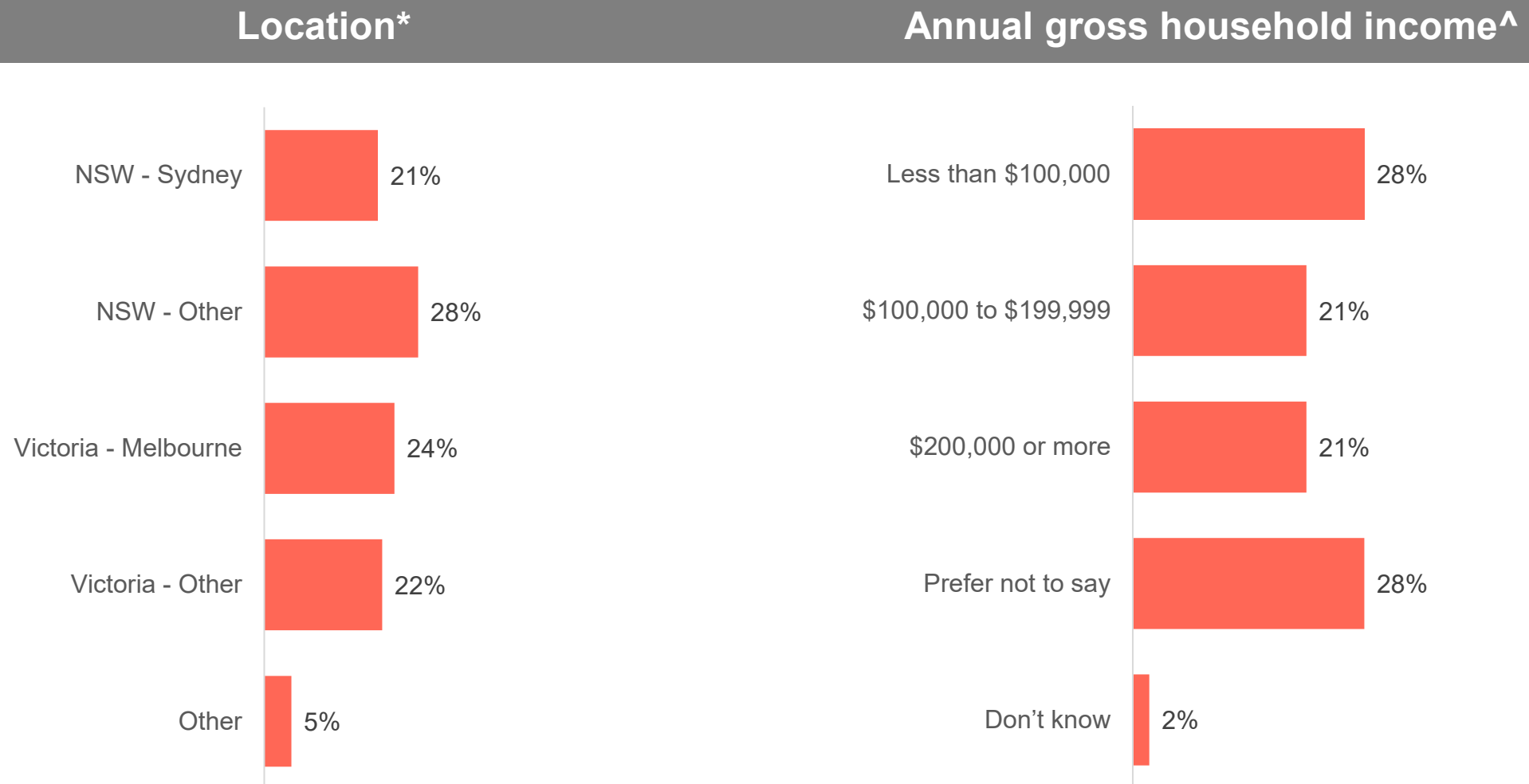
- This study was conducted as an online survey between 28 April and 3 June 2025.
- The online survey was sent to Airbnb's database of Australian-based hosts (primarily in NSW and Victoria).
- The sample comprised of 1,012 hosts who responded to the survey and meet the following criteria:
 - Have at least one property which they have listed on Airbnb in the past three months,
 - Have accepted at least one reservation/booking in the past three months,
 - Have 1 to 5 properties listed on Airbnb, and
 - List a whole home or an unhosted accommodation* on Airbnb.
- Respondent profiling information is shown on the following slides.
- YouGov reviewed and refined a pre-existing questionnaire, in collaboration with Airbnb.
- Unless otherwise indicated, results are based on the total sample of 1,012.
- Please note that results derived from a low sample size of <50 are indicative only. Please use with caution.
- All survey results are unweighted proportions. When representing the survey results, please refer to the sample as 'respondents' or 'hosts surveyed'.
- Quotes by hosts featured in this report have been selected by YouGov to explain some of the reasons why the relevant answer was selected. Some quotes have been edited for brevity and to illustrate some of the reasoning of respondents.

*Unhosted accommodation is where the host is not on-site. Owners of hosted accommodation were not able to complete the survey.

Personal demographics



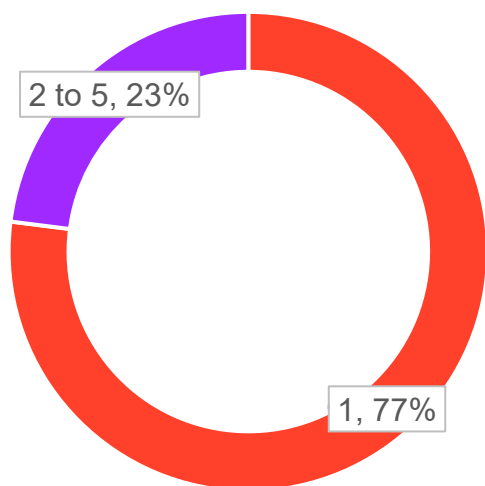
Personal demographics



*Location is self-identified by respondents in the questionnaire. ^Annual gross household income includes income from all sources, including Airbnb listings

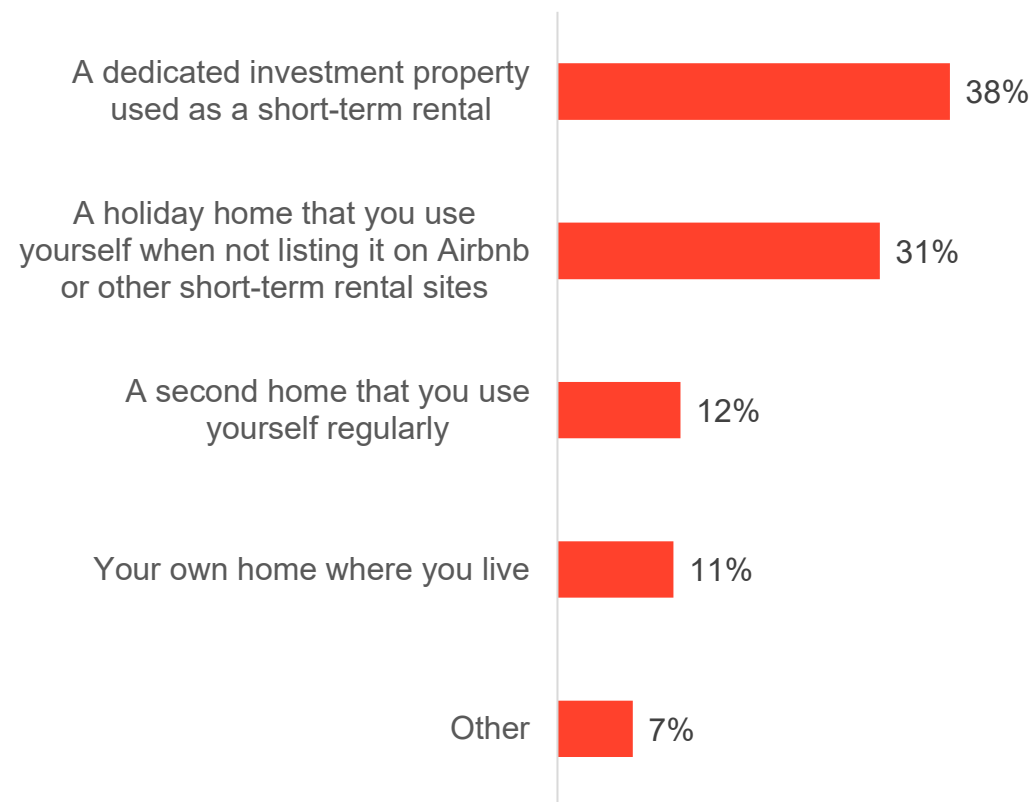
Hosting profile

Number of properties listed



Note: For respondents with 2 to 5 properties listed, the survey asked questions about the property that they rent out on Airbnb most often

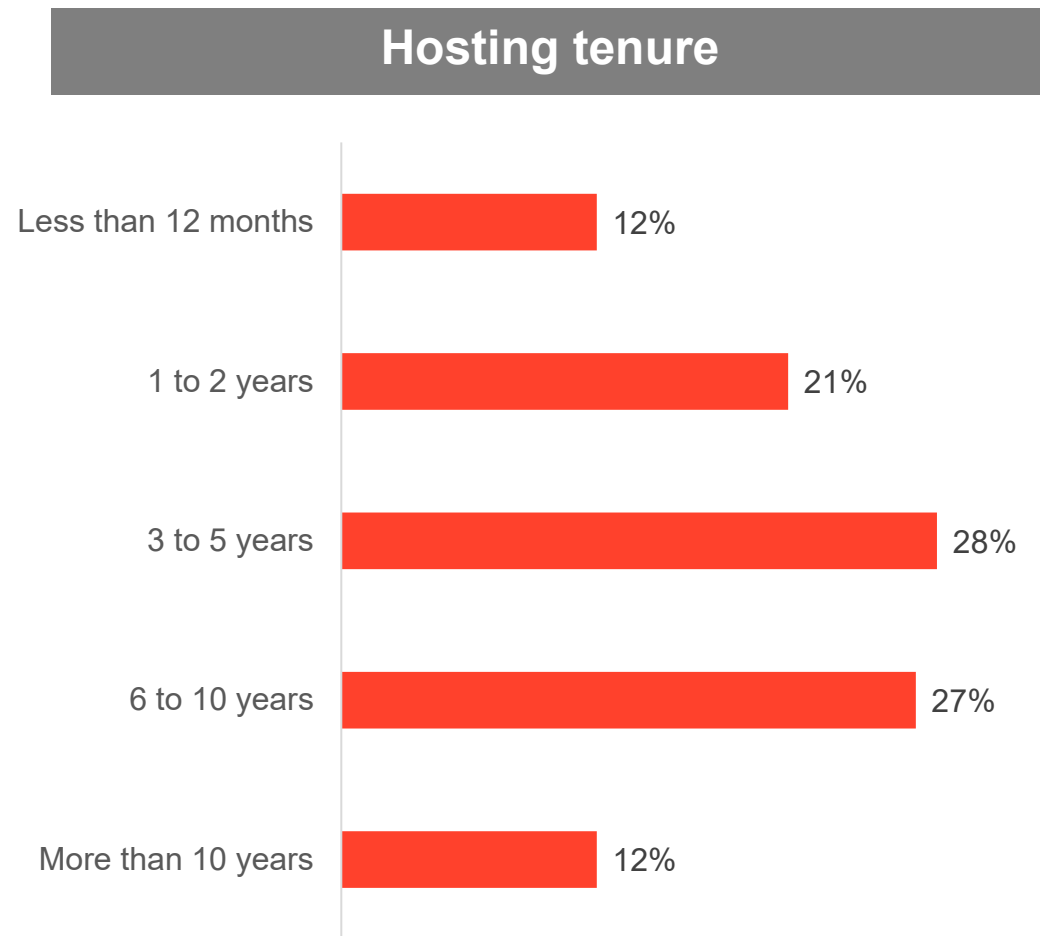
Type of property listed



Q2. How many properties do you list on Airbnb? Please select the option that best applies

Q4. How would you describe the property you list on Airbnb? Please select the option that best applies

Hosting profile



Q8. For how long have you been an Airbnb host? Please select the option that best applies

Key takeaways

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Overall insights

Night caps would have a limited effect on LTR availability

- Overall, only one in eight (12%) would put their property for long-term rental if a night cap was to apply or be lowered.
- The most likely response to night cap restrictions is leaving the property empty once the cap is reached, and not conversion to LTR, a decision driven largely by financial and personal considerations.

STR levies would also have a limited effect on LTR availability

- Overall, only 5% would convert their property for long-term tenancy if a levy was introduced (and even if it did not involve any extra work or out-of-pocket cost from them).
- Most say a levy would not change their behaviour, citing ongoing demand for STRs, limited viability of long-term rental and financial reliance on STR income.

Key takeaways

By location

- Those in Sydney are more likely to believe that a night cap applies to their property (34%) and to say they would leave their property vacant after the cap is reached (51%) in response to night cap restrictions. Those in Melbourne are more likely to say they would sell (19%) in response to night cap restrictions.
- Hosts in regional areas (Other NSW or Other Vic) cite strong local demand for STRs, a lack of viable LTR alternatives and concerns on property damage and maintenance issues as reasons to remain in the STR market.

By hosting experience

- In response to night cap restrictions, those with less than 5 years' experience are more likely to consider converting to LTR (up to 2 years: 15%, 3 to 5 years: 13%), while those who are more experienced (5+ years) are more likely to sell their property (13%).

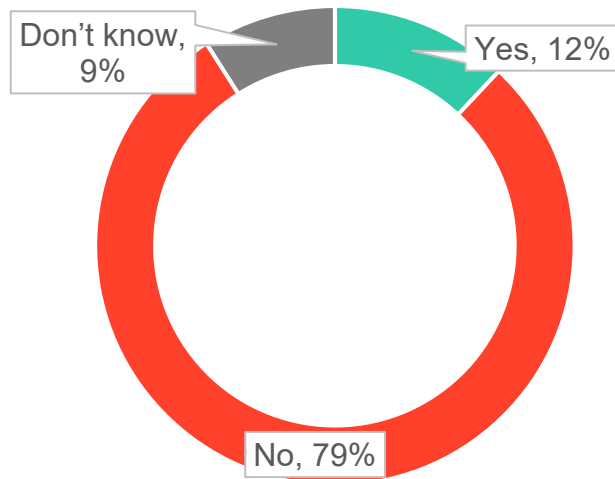
By number of properties

- In response to night cap restrictions, those with 2-5 properties are more likely to sell their property (17%). Those with 2-5 properties are more likely to cite a desire to avoid full-time tenants (47% compared to 35%), while those with 1 property are more likely to cite a need to use the property for their primary residence (14% compared to 7%) or a second or holiday home (40% compared to 22%).

Detailed findings

One in eight (12%) say a night cap applies to their property

Whether a night cap applies

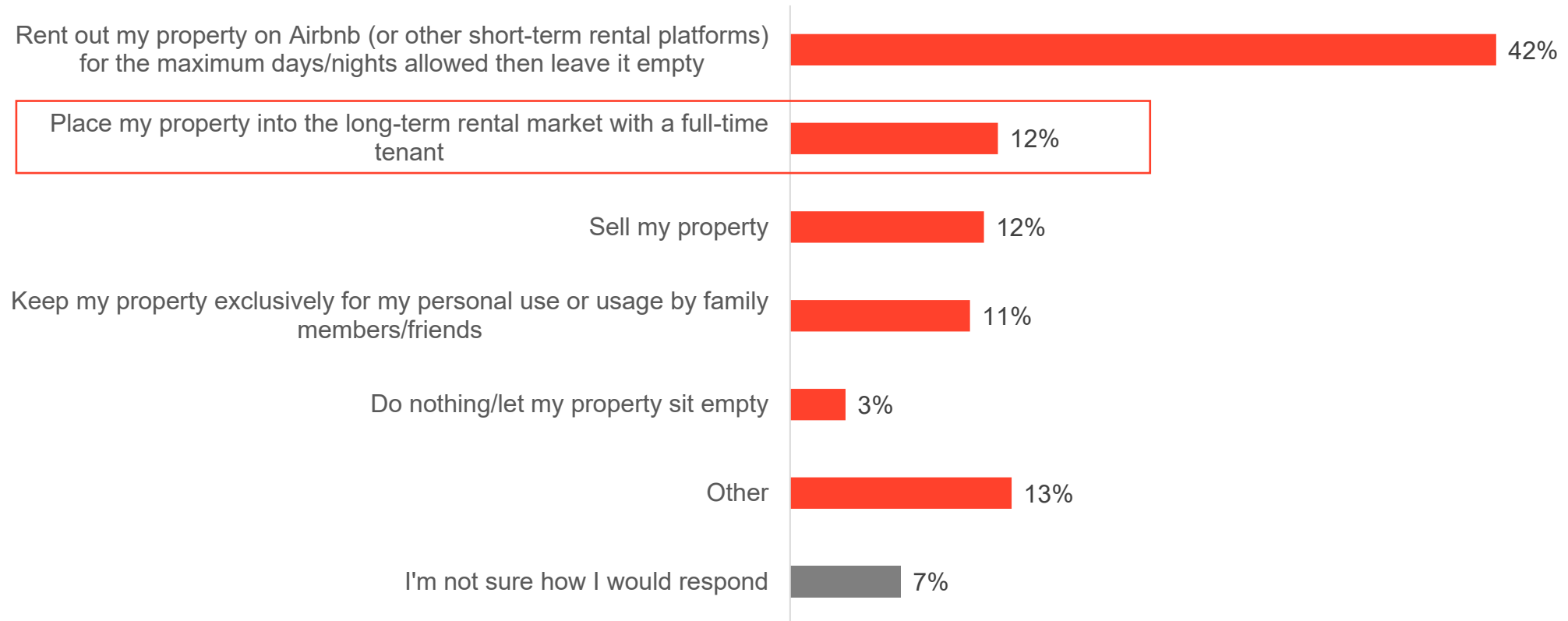


- Respondents with up to 2 years hosting experience are more likely to be unsure whether a night cap applies to their property (16%, compared to 3-5 years: 8%, more than 5 years: 5%)

Q5. Some people have suggested that 'night caps' or usage restrictions on short-term rentals would cause short-term rental properties to be converted to the long-term rental market. A night cap means that a property owner cannot short-term rent the property for more than a set number of nights within a 12-month period (for example, in areas of Byron Bay NSW, a home cannot be rented out for more than 60 nights a year, and in metropolitan Sydney, you cannot rent out a whole home for more than 180 nights a year). To the best of your knowledge, does a night cap currently apply to your property? Please select the option that best applies

Among those who say the night cap applies, only around one in eight (12%) would put their property for long-term rental if it was lowered

Most likely action if night cap was lowered (among respondents who say a night cap applies to their property)



N=121 respondents who say the night cap applies. Q5B. If the night cap that applies to your property was to be lowered even further, meaning that the number of nights was even more restricted, what would you most likely do with your property? Please select the option that best applies

Consideration against long-term rentals is driven by a preference for greater flexibility and stronger income potential. Other reasons include negative experiences with long-term tenants and general concerns over government policy and its impact

Reasons for **not** placing their property into the long-term rental market (among respondents who say a night cap applies to their property)

“With the alternative being long term tenants, the short stay option still suits me better. I like being part of the hospitality sector. I love bringing people to the area where I live and for them to be able to see my beautiful city of Sydney! (Bondi Junction based). My guests are often families who otherwise would not be able to afford to travel and visit my area.” (Female, 45-54, Sydney)

“Renting my properties in the STR option over long term tenancy is a better way to go. Airbnb on all occasions have assisted... and provided Aircover when needed. I help those whose property has damage and need short urgent accommodation for their family and pets.” (Female, 45-54, Melbourne)

“Such restrictions are unlikely to encourage a significant shift toward long-term rentals. Instead, they will likely drive up both short- and long-term rental prices.” (Male, 55-64, Sydney)

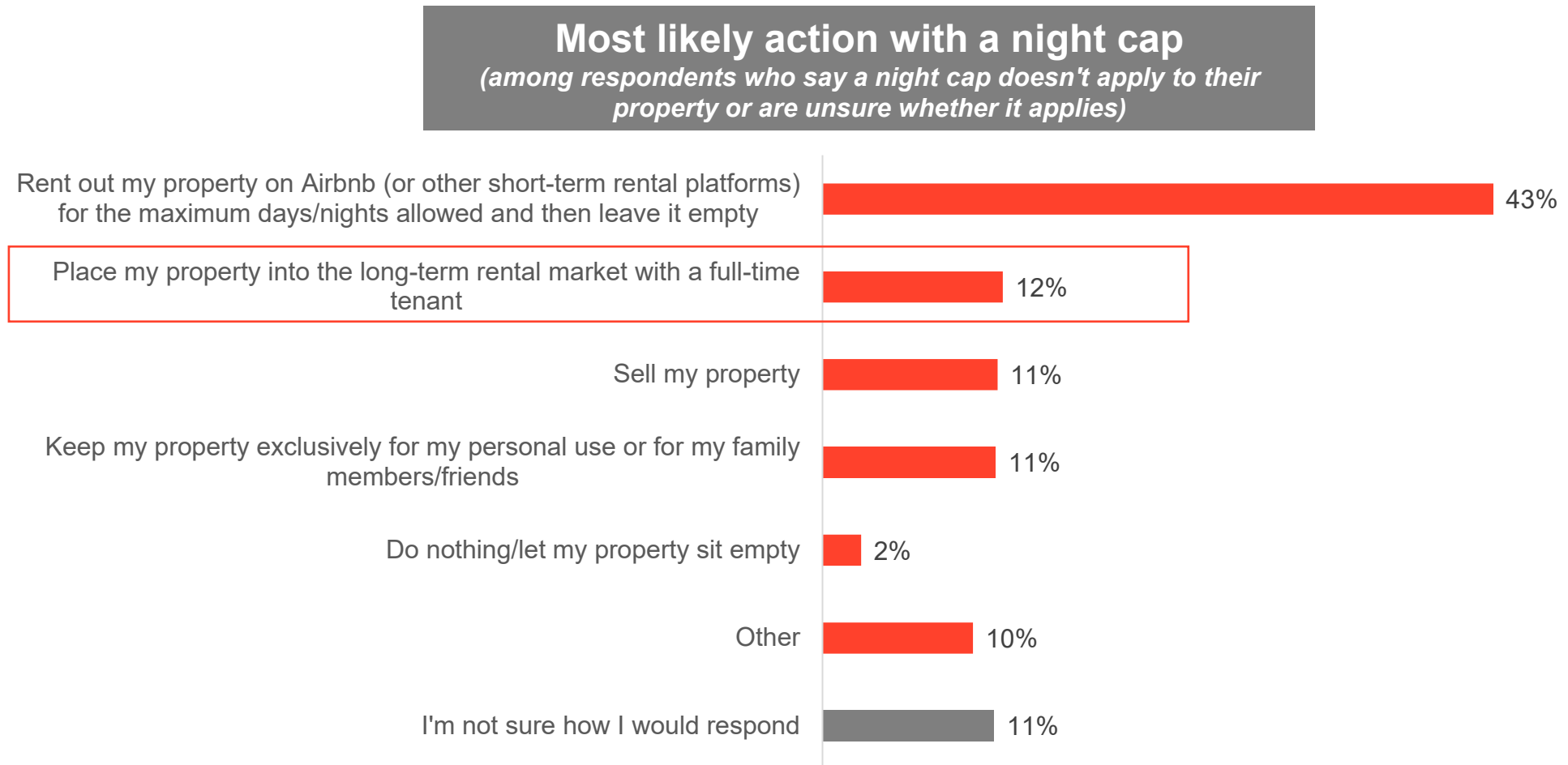
“Our property is difficult to rent out long term due to the fact that it is located in a building originally designed for short-term accommodation in a tourist area. We are directly above commercial premises (restaurants) which is a plus for short term guests, but this is a turn off for long term guests.” (Female, 55-64, Sydney)

“...it limits the amount I can earn from my main asset without any clear benefit, in fact, it's a loss for my local area in that I am not able to bring in tourists who spend their money in the small shops and restaurants around me that are also no doubt struggling in this economy.” (Female, 35-44, Sydney)

“I moved to Australia at a later stage in life and had to start all over again. This property is my way of playing catch up and that I can be independent when I retire.” (Female, 55-64, Sydney)

Q5BO. If you would like to add any details or reasoning for your answer, please share this information below.

Excluding those who say the night cap applies, only around one in eight (12%) would put their property for long-term rental if it was to apply



N=891 respondents who say the night cap doesn't apply or are unsure whether it applies. Q5C. How would you most likely respond to government rules or regulations that restricted the number of nights you were allowed to list or rent out your property on Airbnb? Please select the option that best applies

Those older, in Sydney are more likely to leave properties empty after the cap; those younger, less experienced are more likely to prefer long-term rentals

- The following groups are more likely to rent out their property up to the cap and then leave it empty:
 - Those aged 55 to 64 (45%) and 65 or older (46%) compared to under 45 (34%)
 - Those in Sydney (54%) compared to Other NSW (44%), Melbourne (35%) and Other Vic (40%)
- The following groups are more likely to place their property into the long-term rental market:
 - Those with up to 2 years (14%) or 3 to 5 years (13%) of hosting experience compared to more than 5 years (8%)
 - Those aged under 45 (21%) compared to 55 to 64 (9%) and 65 or older (7%)
- The following groups are more likely to sell their property:
 - Those with 2-5 properties (18%) compared to 1 property (9%)
 - Those with more than 5 years of hosting experience (14%) compared to up to 2 years (9%)
 - Men (15%) compared to women (9%)
 - Those in Melbourne (19%) compared to Sydney (5%), Other NSW (9%) and Other Vic (12%)

Consideration against long-term rentals is driven by tourism value, financial strain, opposition to government regulation and loss of property control

Reasons for **not** placing their property into the long-term rental market

“Holiday homes serve a good purpose to enhance people's choices for accommodation on the Mornington Peninsula and their experience. They allow for families to stay together and enjoy the experience of their stay, over and above what a motel or hotel can supply. The area is often used for weddings, golf trips, fishing trips, horse riding, scuba diving, bush walking, mountain climbing, bike riding, surfing and many year round activities and should not be restricted by government overreach.” (Male, 55-64, Melbourne)

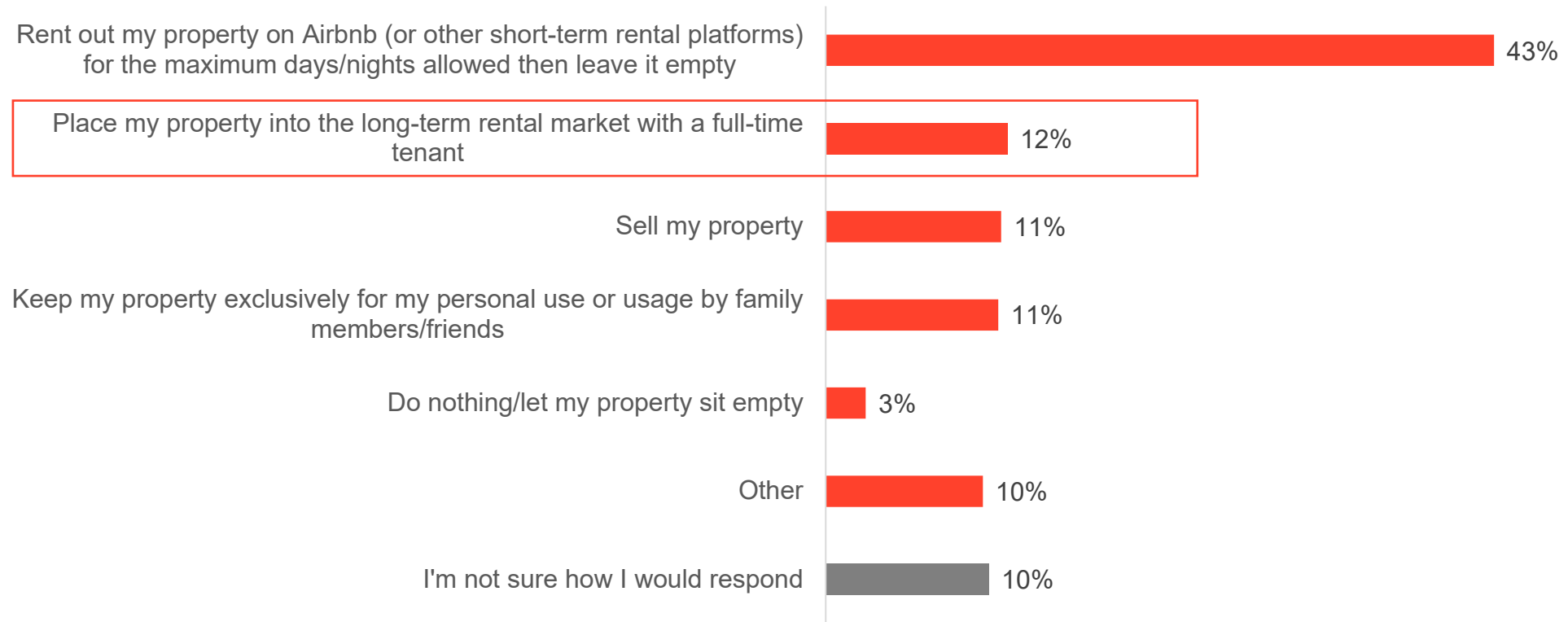
“I purchased the two properties, worked really hard to pay them off and now earn a legitimate income from it. It is my only income. My property guests don't cause any issue to neighbours and I pay my taxes (more now they have increased it).” (Female, 45-54, Melbourne)

“I don't think the Sate Government realises how much STRA's generate for regional income and employment.” (Male, 55-64, Sydney)

“Renting my property to long term tenants would mean we cannot use the property. We Airbnb our property when we are not using it, which allows us to cover costs... We still then get to use the property as well.” (Prefer not to say, 45-54, Other NSW)

Overall, only around one in eight (12%) would put their property for long-term rental if a night cap was to apply or be lowered

Most likely action with a night cap (among all respondents – merged)

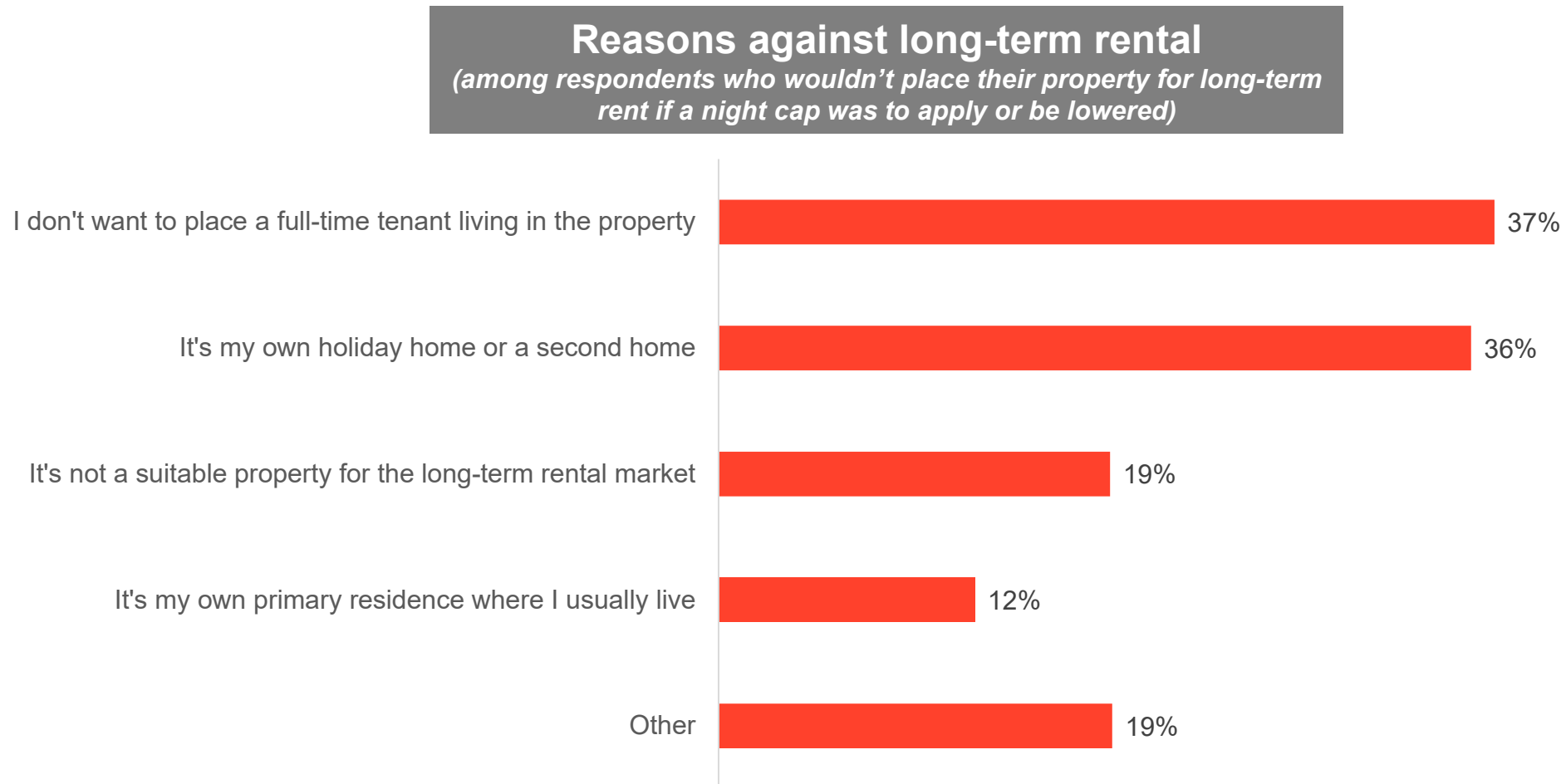


Q5B. If the night cap that applies to your property was to be lowered even further, meaning that the number of nights was even more restricted, what would you most likely do with your property? Please select the option that best applies. Q5C. How would you most likely respond to government rules or regulations that restricted the number of nights you were allowed to list or rent out your property on Airbnb? Please select the option that best applies

Those older, in Sydney are more likely to leave properties empty after the cap; those younger, less experienced are more likely to prefer long-term rentals

- The following groups are more likely to rent out their property up to the cap and then leave it empty:
 - Those aged 45 to 54 (44%), 55 to 64 (46%) and 65 or older (44%) compared to under 45 (33%)
 - Those in Sydney (51%) compared to Melbourne (35%) and Other Vic (40%)
- The following groups are more likely to place their property into the long-term rental market:
 - Those with up to 2 years (15%) or 3 to 5 years (13%) of hosting experience compared to more than 5 years (8%)
 - Those aged under 45 (19%) compared to 55 to 64 (10%) and 65 or older (7%)
- The following groups are more likely to sell their property:
 - Those with 2-5 properties (17%) compared to 1 property (9%)
 - Those with more than 5 years of hosting experience (13%) compared to up to 2 years (8%)
 - Those in Melbourne (19%) compared to Sydney (6%) and Other NSW (9%)

The key reasons against long-term rental are avoiding full-time tenants and keeping the property for personal use



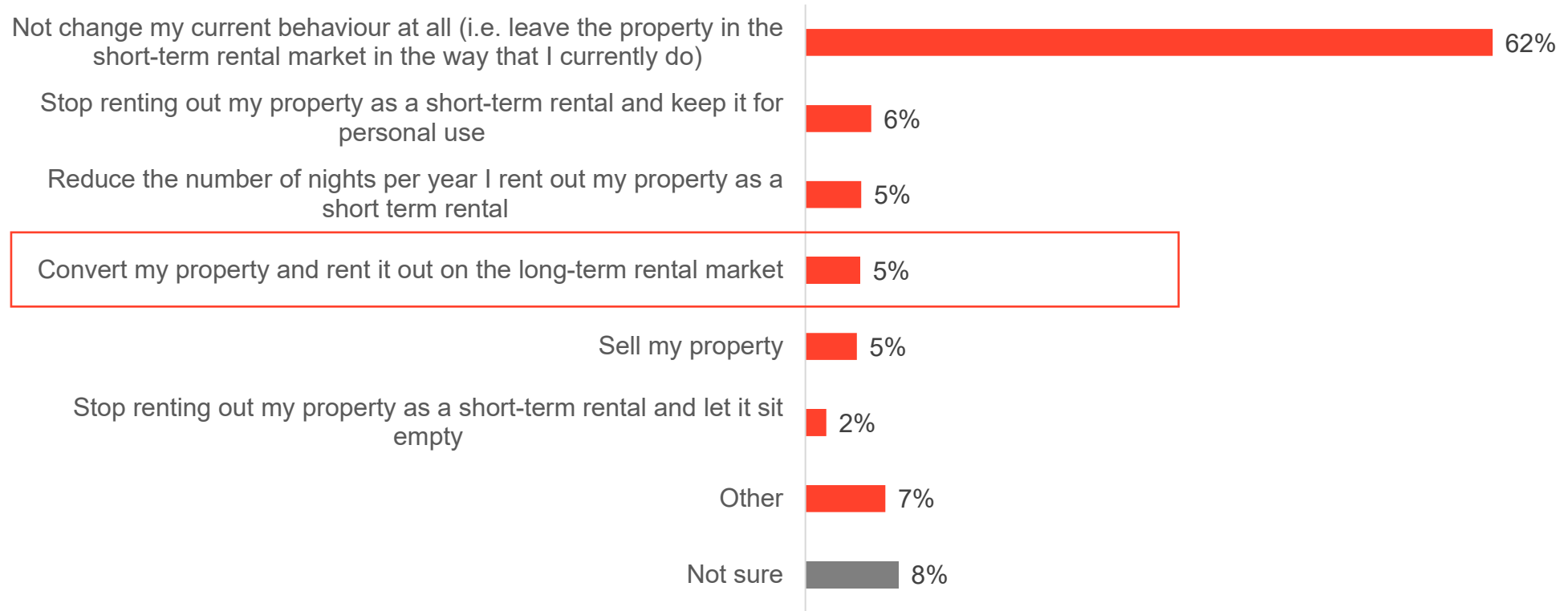
N=894 respondents who wouldn't place their property for long-term rent. Q5D. Why wouldn't you place your property in the long-term rental market? Please select all that apply

Reasons vary depending on income and number of properties listed

- Those with 2-5 properties are more likely to cite a desire to avoid full-time tenants (47% compared to 35%), while those with 1 property are more likely to cite a desire or need to use the property for personal use, whether as their primary residence (14% compared to 7%) or a second or holiday home (40% compared to 22%).
- Those with a household income of \$100k or more are more likely to cite a desire to use it as their second or holiday home (\$100k-\$199k: 40%, \$200k+: 39%, compared to <\$100k: 29%), while those with a household income of <\$100k are more likely to cite a desire or need to use the property as their primary residence (22%, compared to \$100k-\$199k: 9%, \$200k+: 11%).

Only 5% are likely to convert their property for long-term tenancy with a STR levy

Most likely impact of a STR levy



Q6. Some state governments have (or are considering) a levy on short-term rental properties, which would be paid by the guest at the time of booking. For example, a percentage charge payable on top of the booking fee. Even if that levy did not involve any extra work or out-of-pocket cost from you as the host of the property, how would it most likely impact your current behaviour with your short-term rental property? Please select the option that best applies

Those younger, in Sydney and Melbourne are more likely to convert their property for long-term rental

- The following groups are more likely to convert their property for the long-term rental market:
 - Those aged under 45 (10%) compared to 55 to 64 (3%) and 65 or older (3%)
 - Those in Sydney (6%) and Melbourne (9%) compared to Other NSW (2%)
- Those aged 65 or older (8%) are more likely than those aged under 45 (2%) and 45 to 54 (4%) to reduce the number of nights they rent out their property as a short-term rental.

Reasons include continued demand, limited long-term rental viability and reliance on income from STR

Reasons for **not** converting their property for long-term rental

“A per night levy on guests would make stays more expensive, which would be an additional expense on them, but unlikely to change my renting activity. Most of my guests come for weddings, and need a home more than hotel rooms to get ready. They would likely just have to pay the extra levy, and are not likely to change their wedding plans. Similarly for my mid week renters who are usually transient workers like doctors and nurses...” (Male, 55-64, Other NSW)

“At the moment I rely on this income to support my family in paying our mortgage and other bills as well as engaging local residents for servicing the property. Essentially I would see this as a bureaucratic tax in effect on my industry, penalising me for working hard to provide for my family and my retirement (where I am trying to avoid becoming a burden on the government and tax payers).” (Female, 45-54, Sydney)

Other reasons include concerns about government overreach, tourism impact and rising costs

Reasons for **not** converting their property for long-term rental

"We bring in many tourists to a small community where they spend money on local restaurants, services, tourist attractions etc.. Those businesses pay tax on what they earn. There are insufficient motels etc. to service demand. The govt already wins. All this tax would do is hurt tourism and local business." (Male, 55-64, Sydney)

"While the cost of living increases everywhere, people expect that the hosts should absorb these costs, while at the same time are not contributing to keeping them down, both cleaning and conservatively. For example, running the air con/heating while they are absent from the accommodation." (Prefer not to say, 55-64, Other NSW)

"The short-term rental levy might reduce the opportunity for a profit and maintaining the property far more difficult. This could impact the ability of visitors to find accommodation in the CBD and make visiting Melbourne and its cultural events less desirable or accessible. I can only see long term disadvantages for the city and its inhabitants." (Female, 55-64, Melbourne)

"There is an oversupply of apartments in Melbourne CBD and consequently long rental returns are low. Airbnb - short term rentals is the only way to make it profitable. Extra fees and rules will ruin my income stream and my retirement savings - which are minimal." (Female, 65+, Other Vic)

High costs, reduced profitability and a desire to support the community are key reasons for shifting to long-term rental

Reasons for converting their property for long-term rental

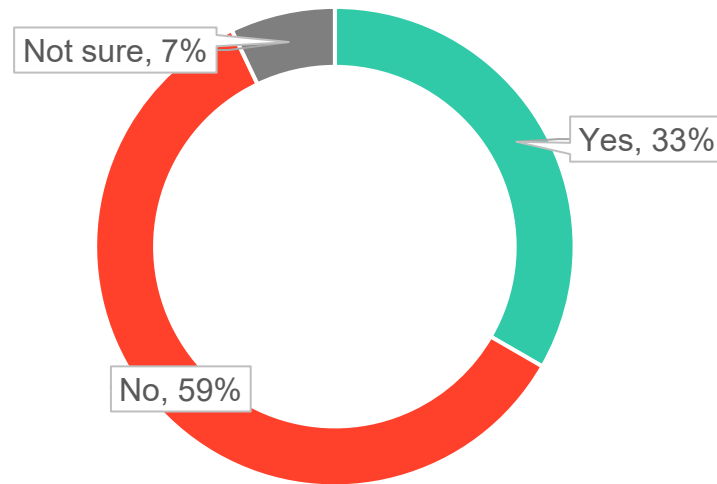
“The costs are not my reason to go to long term rentals- it is because I see the need in my community.” (Female, 55-64, Other Vic)

“Short term rental is now no more lucrative than long term rentals and long term rentals are much less work from a landlords perspective.” (Female, 35-44, Melbourne)

Q6O. If you would like to add any details or reasoning for your answer, please share this information below.

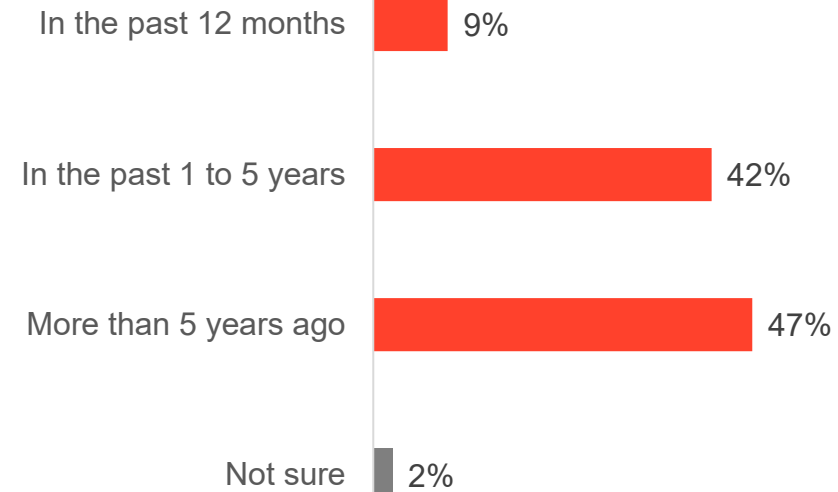
Only one in three (33%) say their property has ever been on the long-term rental market

Whether property has ever been on the long-term rental market



Last time on the long-term rental market

(among respondents with a property that has been on the long-term rental market)



Q7. To the best of your knowledge, has the property you list on Airbnb ever been on the long-term rental market, either during the time that you have owned it or prior? Please select the option that best applies. N=338 respondents whose property has been on the long-term rental market. Q7B. When was the last time that it was listed on the long-term rental market? Please select the option that best applies

Questionnaire

Questionnaire

[Q1] Do you have at least one property which you have listed on Airbnb in the past three months and accepted at least one reservation/booking?

Please select the option that best applies

<1> Yes

<2> No (terminate)

[Q2] How many properties do you list on Airbnb?

Please select the option that best applies

<1> 1

<2> 2-5

<3> 6 or more (terminate)

[Q3] When guests come to stay in the property, do you typically remain on site during the guest's stay? For example, is the property you list on Airbnb a private room in your own home, or a granny flat out the back of your own home?

Please select the option that best applies

<1> Yes (terminate)

<2> No

Questionnaire

[Q4] How would you describe the property you list on Airbnb?

Please select the option that best applies

- <1> Your own home where you live
- <2> A second home that you use yourself regularly
- <3> A holiday home that you use yourself when not listing it on Airbnb or other short-term rental sites
- <4> A dedicated investment property used as a short-term rental
- <955> Other [open] please specify

[Q5] Some people have suggested that "night caps" or usage restrictions on short-term rentals would cause short-term rental properties to be converted to the long-term rental market. A night cap means that a property owner cannot short-term rent the property for more than a set number of nights within a 12-month period (for example, in areas of Byron Bay NSW, a home cannot be rented out for more than 60 nights a year, and in metropolitan Sydney, you cannot rent out a whole home for more than 180 nights a year). To the best of your knowledge, does a night cap currently apply to your property?

Please select the option that best applies

- <1> Yes
- <2> No
- <977 fixed exclusive> Don't know

Questionnaire

(Asked if Yes in Q5)

[Q5B] If the night cap that applies to your property was to be lowered even further, meaning that the number of nights was even more restricted, what would you most likely do with your property?

Please select the option that best applies

- <1> Rent out my property on Airbnb (or other short-term rental platforms) for the maximum days/nights allowed then leave it empty
- <2> Keep my property exclusively for my personal use or usage by family members/friends
- <3> Sell my property
- <4> Place my property into the long-term rental market with a full-time tenant
- <5> Do nothing/let my property sit empty
- <955 fixed> Other [open] please specify
- <977 fixed exclusive> I'm not sure how I would respond

[Q5BO] If you would like to add any details or reasoning for your answer, please share this information below.

Please type in your response below. You may skip this question if you do not wish to share any further information

Questionnaire

(Asked if No or Don't know in Q5)

[Q5C] How would you most likely respond to government rules or regulations that restricted the number of nights you were allowed to list or rent out your property on Airbnb?

Please select the option that best applies

- <1> Rent out my property on Airbnb (or other short-term rental platforms) for the maximum days/nights allowed and then leave it empty
- <2> Keep my property exclusively for my personal use or for my family members/friends
- <3> Sell my property
- <4> Place my property into the long-term rental market with a full-time tenant
- <5> Do nothing/let my property sit empty
- <955 fixed> Other [open] please specify
- <977 fixed exclusive> I'm not sure how I would respond

[Q5CO] If you would like to add any details or reasoning for your answer, please share this information below.

Please type in your response below. You may skip this question if you do not wish to share any further information

Questionnaire

(Asked if not place my property into the long-term rental market in Q5B or Q5C)

[Q5D] Why wouldn't you place your property in the long-term rental market?

Please select all that apply

- <1> It's my own primary residence where I usually live
- <2> It's my own holiday home or a second home
- <3> I don't want to place a full-time tenant living in the property
- <4> It's not a suitable property for the long-term rental market
- <955 fixed> Other [open] please specify

Questionnaire

[Q6] Some state governments have (or are considering) a levy on short-term rental properties, which would be paid by the guest at the time of booking. For example, a percentage charge payable on top of the booking fee.

Even if that levy did not involve any extra work or out-of-pocket cost from you as the host of the property, how would it most likely impact your current behaviour with your short-term rental property?

Please select the option that best applies

<1> Reduce the number of nights per year I rent out my property as a short term rental

<2> Stop renting out my property as a short-term rental and keep it for personal use

<3> Stop renting out my property as a short-term rental and let it sit empty

<4> Convert my property and rent it out on the long-term rental market

<5> Sell my property

<6 fixed> Not change my current behaviour at all (i.e. leave the property in the short-term rental market in the way that I currently do)

<955 fixed> Other [open] please specify

<977 fixed exclusive> Not sure

[Q6O] If you would like to add any details or reasoning for your answer, please share this information below.

Please type in your response below. You may skip this question if you do not wish to share any further information

Questionnaire

[Q7] To the best of your knowledge, has the property you list on Airbnb ever been on the long-term rental market, either during the time that you have owned it or prior?

Please select the option that best applies

<1> Yes

<2> No

<977 fixed exclusive> Not sure

(Asked if Yes in Q7)

[Q7B] When was the last time that it was listed on the long-term rental market?

Please select the option that best applies

<1> In the past 12 months

<2> In the past 1 to 5 years

<3> More than 5 years ago

<977 fixed exclusive> Not sure

Questionnaire

[Q8] For how long have you been an Airbnb host?

Please select the option that best applies

<1> Less than 12 months

<2> 1 to 2 years

<3> 3 to 5 years

<4> 6 to 10 years

<5> More than 10 years

[Age] We will now ask some final questions about you. How old are you?

<1> 18 to 24

<2> 25 to 34

<3> 35 to 44

<4> 45 to 54

<5> 55 to 64

<6> 65 or older

Questionnaire

[gender] What is your gender?

<1> Male

<2> Female

<3> Non-binary

<933> Prefer not to say

[Location] Where do you live in Australia?

<1> NSW - Sydney

<8> South Australia - Other

<2> NSW - Other

<9> Western Australia - Perth

<3> Victoria - Melbourne

<10> Western Australia - Other

<4> Victoria - Other

<11> Tasmania

<5> Queensland - Brisbane

<12> Northern Territory

<6> Queensland - Other

<13> ACT

<7> South Australia - Adelaide

Questionnaire

[localincome] If you add up the income from all sources, what is your average GROSS household income per year? (GROSS income means amounts before tax is deducted and excluding compulsory superannuation contributions made by your employer.)

- | | |
|------------------------|--------------------------|
| <1> Less than \$20,000 | <9> \$90,000 - 99,999 |
| <2> \$20,000 - 29,999 | <10> \$100,000 - 119,999 |
| <3> \$30,000 - 39,999 | <11> \$120,000 - 149,999 |
| <4> \$40,000 - 49,999 | <12> \$150,000 - 199,999 |
| <5> \$50,000 - 59,999 | <13> \$200,000 and above |
| <6> \$60,000 - 69,999 | <998> Prefer not to say |
| <7> \$70,000 - 79,999 | <999> Don't know |
| <8> \$80,000 - 89,999 | |

Thank you

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