

MARIN COUNTY SHORT TERM RENTAL (STR) REGULATIONS UPDATE



Community Development Agency
3501 Civic Center Drive, Suite 308
San Rafael, CA 94903
415 473 6269 T / 415 473 7880 F
marincounty.org/STR

Fall 2022

AGENDA

5:30-5:40 Introduction

❖ Goals and Objectives

5:40-6:00 Short Term Rentals (STRs) Overview

6:00-6:15 Guiding Principles and STR Discussion

6:15-6:30 Next Steps and Conclusion



LEARNING SESSION GOALS

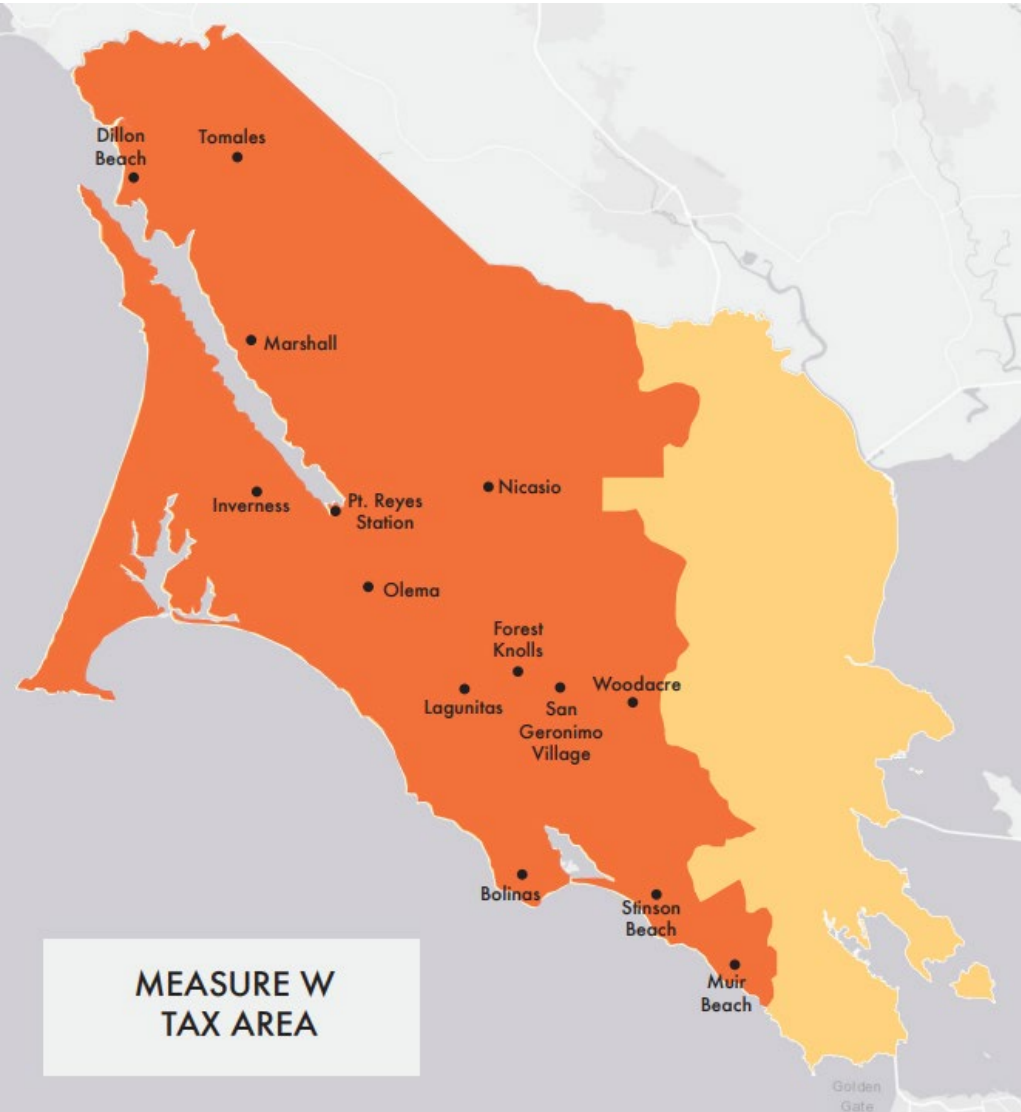
- Provide a quick history of Short Term Rental (STR) regulations in the unincorporated area of the County
- Introduce STR Data collected to date
- Discuss community visions and priorities
- Share next steps in process



STR BACKGROUND

- The Marin County Board of Supervisors first adopted short term rental (STR) regulations in 2018, requiring operators to obtain both a Business License and Transient Occupancy Tax Certificate.
- The STR Ordinance established “Good Neighbor” Policies to alleviate the impacts of STRs on surrounding communities.
- Third Party monitoring provided by Host Compliance.
- Updated STR Ordinance in 2020 to change the manner in which the Local Contact Person is provided to the County.
- However, with housing supply, community workforce, and public safety as motivators, the Board adopted a two-year moratorium, ending May 23, 2024, on new STRs in the West Main Area (also known as the Measure W Tax Area).





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SHORT TERM RENTAL DATA



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RESIDENTIALLY DEVELOPED PROPERTIES

Location	Number of Residentially Developed Properties
East Marin	17,792
West Marin (Measure W Area)	5,263
Unincorporated Total	23,053

Source: Assessor Roll, 2022

Location	Total Number of Residential Units
East Marin	21,318
West Marin (Measure W Area)	6,255
Unincorporated Total	27,573

Source: Assessor Roll, 2022



SINGLE- AND MULTI-FAMILY UNITS

Location	Total Number of Residentially Developed Properties With 1 Unit	Total Number of Residentially Developed Properties with More Than 1 Unit
East Marin	16,633	1,129
West Marin (Measure W Area)	4,524	737
Unincorporated Total	21,187	1,866
Source: Assessor Roll, 2022		



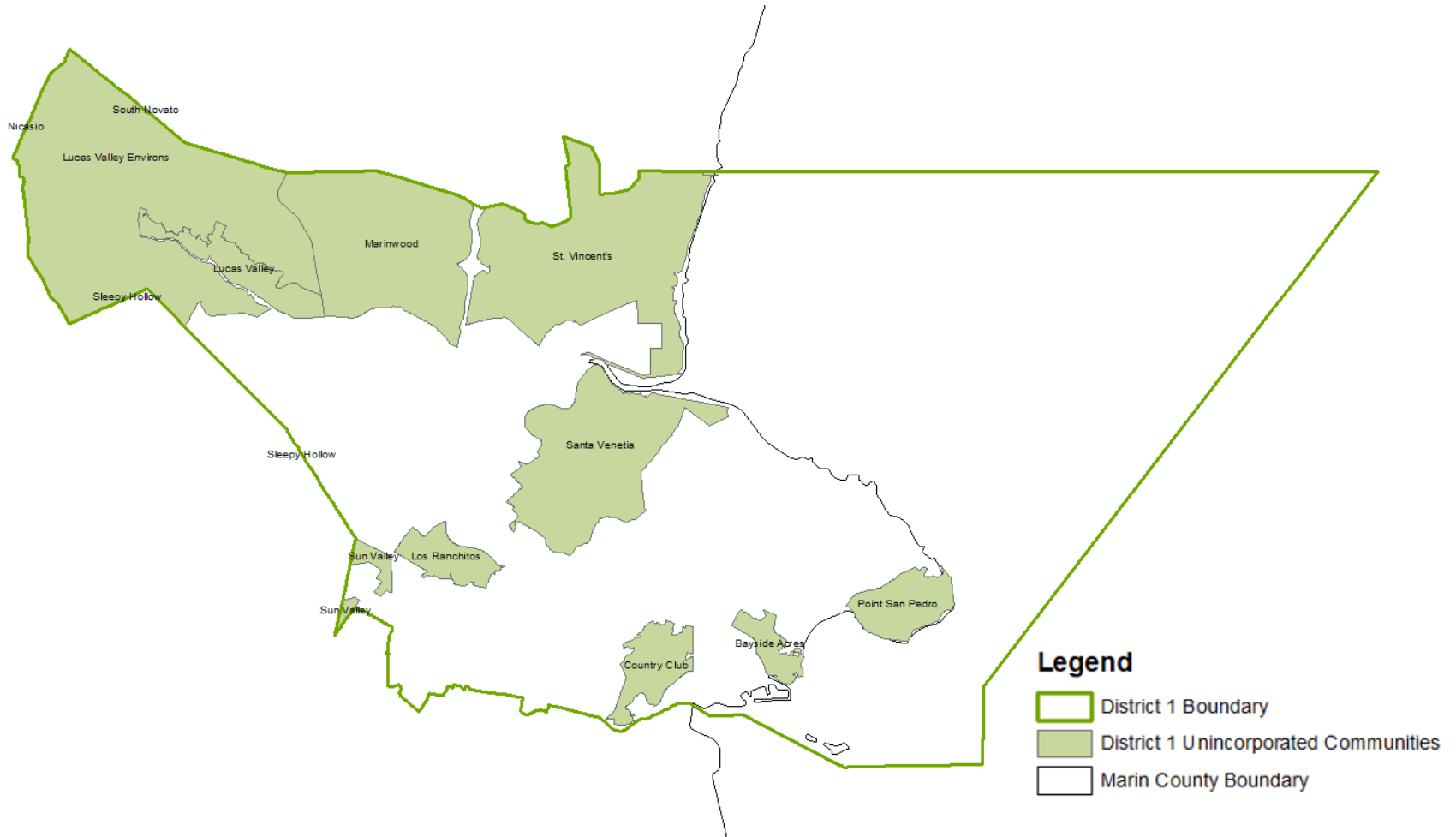
WHERE ARE SHORT TERM RENTALS LOCATED?

Residential Short Term Rental Locations	Number of Properties Operating Short Term Rentals
East Marin	252
West Marin (Measure W Area)	621
Total	873

Source: Department of Finance 2022



UNINCORPORATED COMMUNITIES IN DISTRICT 1



DISTRICT 1 – SHORT TERM RENTAL TOTALS

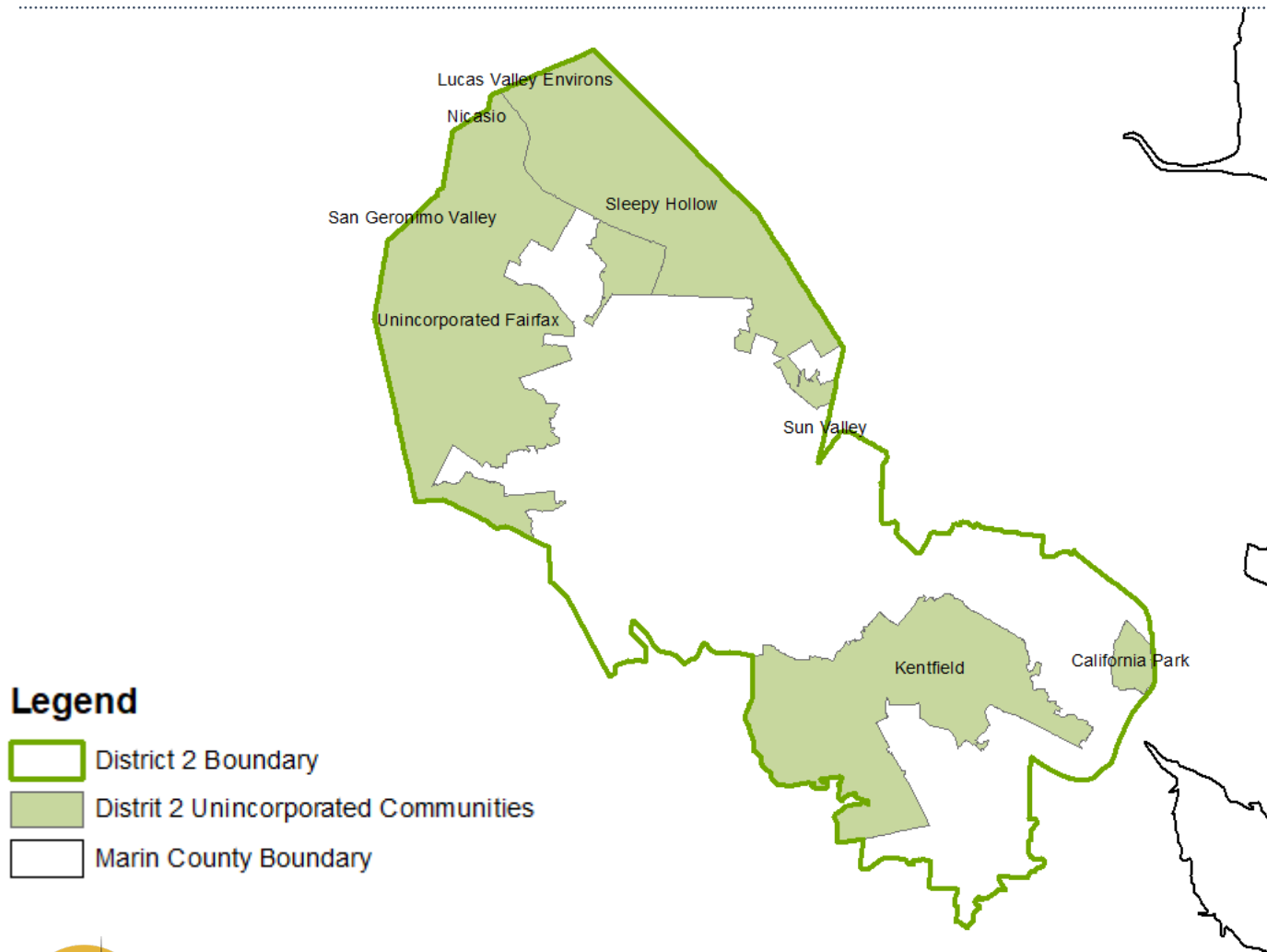
Residential Short Term Rentals by Community

Community	Number of STRs	Number of Parcels Developed with Living Units	Percentage of Parcels Used as STRs	Number of Parcels Developed with Living Units in the City of San Rafael
San Rafael	33	4584	1%	15,202




Source: Department of Finance, Assessor Records, 2022



UNINCORPORATED COMMUNITIES IN DISTRICT 2



Legend

-  District 2 Boundary
-  District 2 Unincorporated Communities
-  Marin County Boundary



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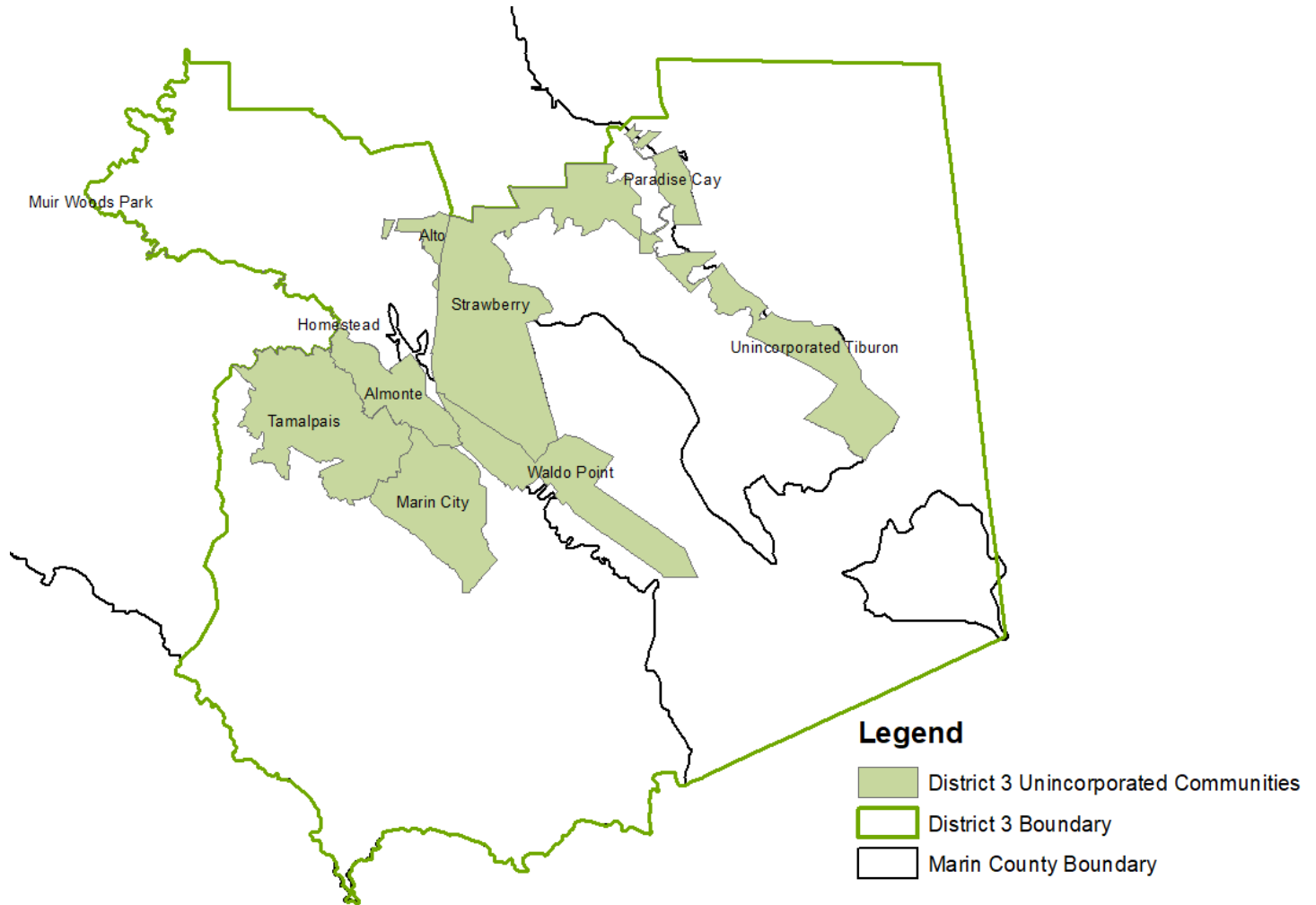
DISTRICT 2 – SHORT TERM RENTAL TOTALS

Residential Short Term Rentals by Community				
Community	Number of STRs	Number Parcels Developed with Living Units	Percentage of Parcels Used as STRs	Number of Parcels Developed with Living Units in Incorporated Jurisdiction
San Anselmo	11	901	1%	4,351
Greenbrae	9	752	1%	
Fairfax	5	393	1%	2,659
Kentfield	17	1,605	1%	

Source: Department of Finance, Assessor Records, 2022



UNINCORPORATED COMMUNITIES IN DISTRICT 3



DISTRICT 3 – SHORT TERM RENTAL TOTALS

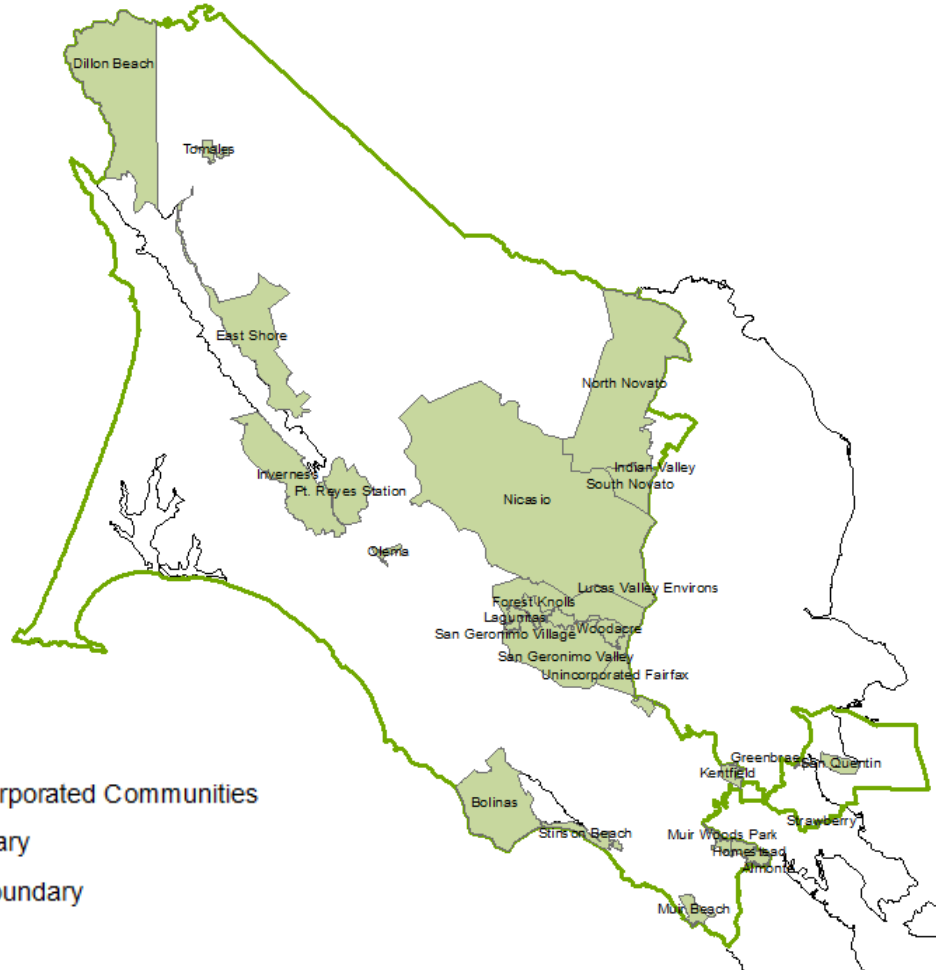
Residential Short Term Rentals by Community

Community	Number of STRs	Number Parcels Developed with Living Units	Percentage of Parcels Used as STRs	Number of Parcels Developed with Living Units in Incorporated Jurisdiction
Mill Valley	143	5,599	3%	5,038
Tiburon	4	426	1%	3,282
Marin City	8	452	2%	
Sausalito	2	367	1%	2,902




Source: Department of Finance, Assessor Records, 2022



UNINCORPORATED COMMUNITIES IN DISTRICT 4



Legend

-  District 4 Unincorporated Communities
-  District 4 Boundary
-  Marin County Boundary



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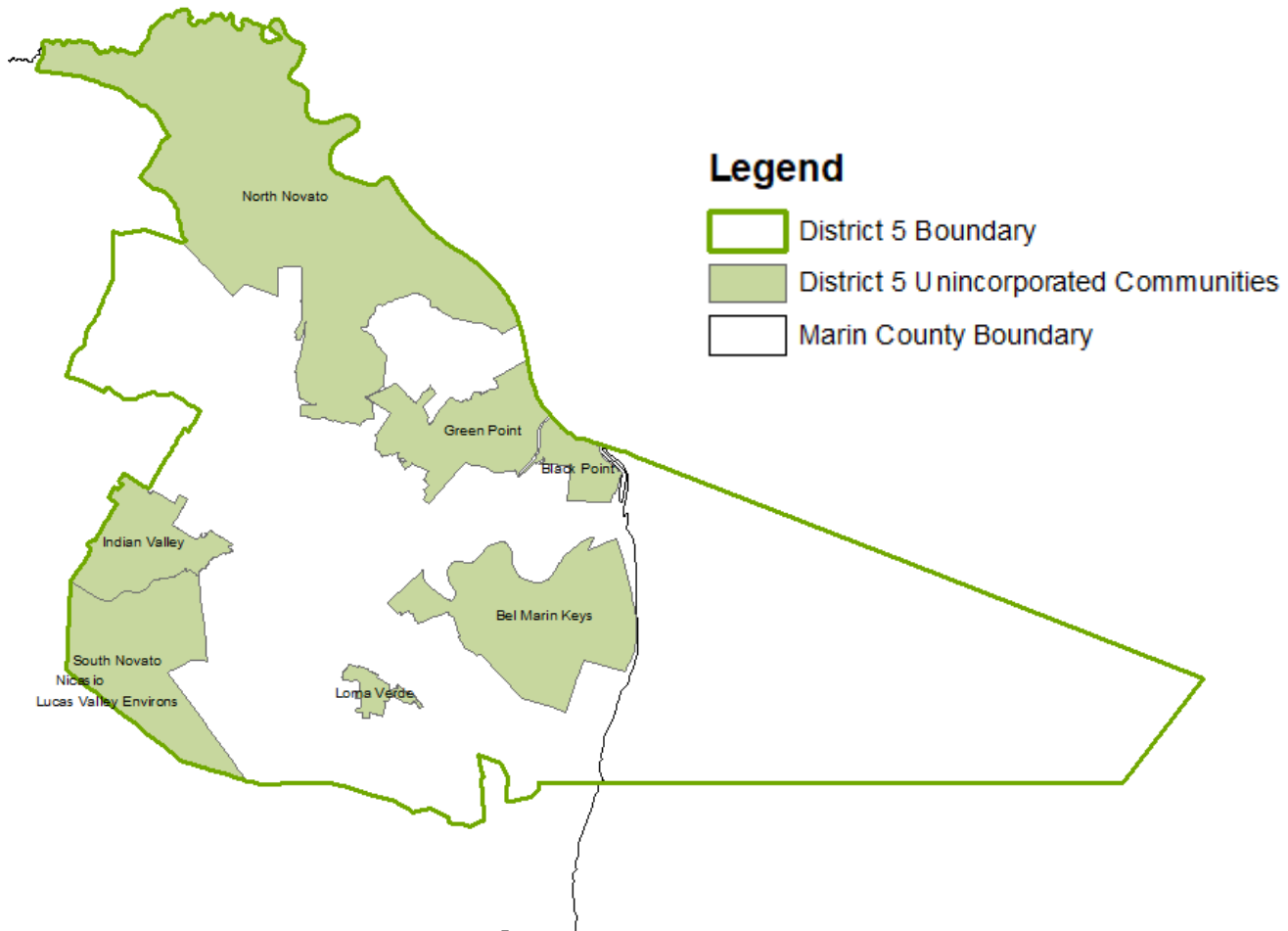
DISTRICT 4 – SHORT TERM RENTAL TOTALS

Residential Short Term Rentals by Community

Community	Number of STRs	Parcels Developed with Living Units	Percentage of Parcels Used as STRs
Dillon Beach	125	408	31%
Stinson beach	192	704	27%
Marshall	28	110	25%
Muir Beach	20	147	14%
Bolinas	63	624	10%
Inverness	93	939	10%
Tomales	12	135	9%
Point Reyes Station	32	350	9%
Olema	3	33	9%
Nicasio	11	240	5%
Petaluma	6	163	4%
San Geronimo	10	223	4%
Forest Knolls	8	312	3%
Lagunitas	6	282	2%
Woodacre	12	578	2%
San Quentin	0	37	0%

Source: Department of Finance, Assessor Records, 2022

UNINCORPORATED COMMUNITIES IN DISTRICT 5



DISTRICT 5 – SHORT TERM RENTAL TOTALS

Residential Short Term Rentals by Community

Community	Number of STRs	Number Parcels Developed with Living Units	Percentage of Parcels Used as STRs	Number of Parcels Developed with Living Units in the City of Novato
Novato	20	2,689	1%	16,710

Source: Department of Finance, Assessor Records, 2022



RENTAL MARKET

The County has received feedback from Short Term Rental operators who question the accuracy of AirDNA's data as it relates to the Short Term Rental Median Monthly Rate (USD). Please take this into consideration when reviewing Slides 20 and 21 of this presentation.

Long v. Short Term Rentals

Community	Long Term Rental Average Monthly Rent (USD)	Short Term Rental Median Monthly Rent (USD)
Novato	\$2,451	\$3,375
San Rafael	\$2,752	\$3,505
Petaluma	\$2,825	\$4,292
San Anselmo	\$3,059	\$3,375
Mill Valley	\$3,763	\$5,085

Source: Rent Café, October 2022 (Long Term Rental Data); AirDNA, September 2022 (STR Data)



Community	Average Daily Rate (in USD) Over the Last Year	Occupancy Rate Over the Past Year	Median Monthly Revenue (in USD) Over the Past Year	Rental Type
Dillon Beach	642	84%	12,500	Entire Home: 100%
Tomales	358	77%	5,900	Entire Home: 58% Private Room: 42%
Marshall	471	82%	10,000	Entire Home: 67% Private Room: 33%
Point Reyes Station	381	88%	7,634	Private Home: 87% Private Room: 13%
Inverness	438	81%	7,625	Private Home 98% Private Room 2
Olema	258	84%	6,325	Entire Home: 100%
Nicasio	473	77%	7,084	Entire Home: 75% Private Room: 15%
Lagunitas	303	79%	4,922	Entire Home: 100%
Forest Knolls	275	76%	6,108	Entire Home: 100%
San Geronimo	281	76%	5,253	Entire Home: 70% Private Room: 30%
Woodacre	232	73%	3,284	Entire Home: 100%
Bolinas	374	83%	7,592	Entire Home: 88% Private Room: 12%
Stinson Beach	524	87%	8,096	Entire Home: 100%
Muir Beach/Sausalito	270	82%	4,000	Entire Home: 88% Private Room: 12%

SHORT TERM RENTAL HOTLINE COMPLAINTS SEPTEMBER 2018 – SEPTEMBER 2022

Complaint Type	Count
Disturbance or Trespassing	13
General Inquiries	11
Noise	45
Occupancy Limits	4
Other Complaints	61
Parking	20
Trash	30
Unauthorized Short Term Rental	107
Total Number of Complaints	291
Source: Host Compliance, September 2022	

Year	Count
2018 (September 2018 - December 2018)	27
2019 (January 2019 - December 2019)	101
2020 (January 2020 - December 2020)	109
2021 (January 2021 - December 2021)	23
2022 (January 2022 - September 2022)	31
Total	291

Community	Count
Bolinas	14
Dillon Beach	71
Fairfax	1
Forest Knolls	2
Greenbrae	2
Inverness	22
Kentfield	1
Lagunitas	1
Marshall	7
Mill Valley	76
Novato	14
Point Reyes	7
San Anselmo	7
San Quentin	6
San Rafael	14
Sausalito	3
Stinson Beach	23
Tiburon	1
Tomales	1
Woodacre	3
N/A	15
Total	291



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COMMUNITY COMPARISONS

- Belvedere, Tiburon, Sausalito, Larkspur and Corte Madera currently prohibit STRs.
- San Anselmo and Ross allow STRs with no specific regulations.
- Mill Valley, San Rafael, Novato, and Fairfax allow STRs, subject to registration and defined regulations.



DRAFT “GUIDING PRINCIPLES”

- Prioritize housing supply and affordability, and consider regulations in light of their effects on the cost and availability of housing within individual communities.
- Advance equity in access to economic opportunities, services and activities.
- Consider environmental constraints, such as water availability.
- Recognize that Marin County has historically provided vacation opportunities to the greater Bay Area region and State.
- Understand the STR market for service providers/community members and distinguish among types STR operations and operators.
- Develop regulations that are **clear, affordable, simple, and enforceable** (C.A.S.E).
- Assure that short term rentals are good neighbors considering noise, parking, trash and other neighborhood quality of life concerns.



NEXT STEPS – ADDITIONAL STAKEHOLDER ENGAGEMENT

- We plan to host additional Learning Sessions, including one conducted entirely in Spanish
- Identify Stakeholders:
 - Community members who do not operate STRs
 - STR Operators (both hosted and unhosted)
 - Agricultural Community
 - Local Business Owners
 - Housing Groups (CLAM, SVHAHA, BCLT, etc.)
 - Marin Association of Realtors
 - Local School Districts
 - Emergency Service Providers
 - Utility Providers

Any other? Please post in chat or share during our discussion time!



NEXT STEPS – REGULATORY PATHWAY

- Refine detailed strategy – apply strategies that have worked in the past in other communities
- Work with Coastal Commission staff to determine necessary approvals
- First public draft for review, Spring 2023



Questions?

Visit www.marincounty.org/str or send us an email at STR@marincounty.org



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