



# MAD RIVER VALLEY

## PLANNING DISTRICT

Fayston • Waitsfield • Warren

### Short-Term Rentals in the Mad River Valley Platform Evaluation Memo

12.22.23

In October 2023, the Warren Planning Commission requested MRVPD assistance in exploring options for gaining a more complete understanding of STRs within their community. In response, MRVPD staff explored, interviewed, analyzed, and is now communicating options for undertaking such an effort. Below are the findings. While Warren served as the impetus to undertake this work at this time, the findings apply to all three MRVPD towns.

#### Context

The purpose of this document is to provide a brief background regarding the Mad River Valley (MRV) short-term rental market, past efforts made to understand it, and ultimately, to offer approaches to collecting additional unbiased data that enhances community understanding of short-term rental impacts in the MRV.

As noted in the Mad River Valley Planning District's (MRVPD) 2021 whitepaper, *Short-Term Rentals in the Mad River Valley*<sup>1</sup>, MRV community members and municipal leaders work continuously to achieve a balance between being a welcoming year-round destination for visitors while simultaneously maintaining a high quality of life for full-time residents. Short-term rentals (STRs) highlight where this balance can become markedly more challenging. Although the MRV has a long history of renting houses as seasonal units—especially to support the area's ski industry—the advent of internet platforms like Airbnb and VRBO has brought attention to social, economic, and public health externalities that should be taken into account when analyzing the impact and considering municipal intervention in the operation of STRs.

The 2021 whitepaper organized the variety of STR-related concerns that have been voiced in the community as follows: Health & Safety, Year-Round Housing, & Community Externalities.

1. Health & Safety
  - a. Lack of tracking and ability to enforce health & safety regulations poses risks for renters and neighbors (e.g. compliance with VT Fire & Building Safety Code and VT Rental Housing Health Code).

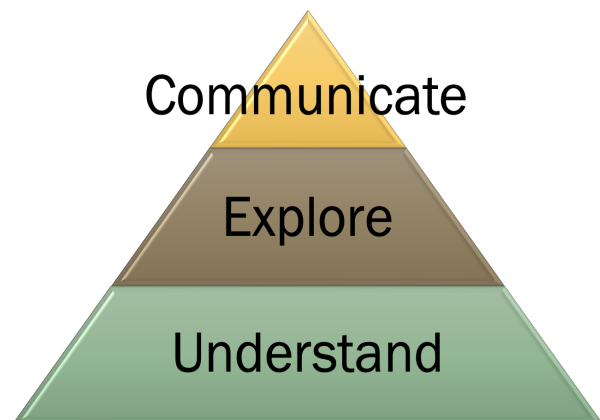
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<sup>1</sup> Mad River Valley Planning District. (2021). *Short-Term Rentals in the Mad River Valley*. [https://mrvpd.org/wp-content/uploads/2021/10/MRV-STR-White-Paper\\_9.28.21.pdf](https://mrvpd.org/wp-content/uploads/2021/10/MRV-STR-White-Paper_9.28.21.pdf)

2. Year-Round Housing
  - a. Conversion of residential units can further stress an already tight housing market by reducing availability and increasing costs of rental and ownership options. Lack of affordable housing strains the local employment base, school enrollment, and impacts community vitality.
3. Community Externalities
  - a. Potential impacts on neighborhoods with a high density of STRs (especially those that can accommodate large numbers of guests) include visible trash, increased traffic & parking demands, and excess noise.
  - b. A decline in long-term neighbors impacts neighborhood character and value, as well as social community investment.

Given the variety of potential community concerns and possible action steps associated with STRs, MRVPD launched the following three-town approach to analyzing STRs in 2022:

1. Understand the Issue
  - a. Inventory Community Perception & Issues
  - b. Gather Accurate & Unbiased Data
  - c. Establish Larger Strategic Objectives
2. Explore Options
3. Communicate Research & Policy Options



1(a) kicked off with the *Mad River Valley Short-Term Rental Survey*<sup>2</sup> (MRV STR Survey), serving as the first step in an information-gathering effort to better understand the impact of STRs on community members. A total of 388 responses were received across the three pathways of respondent types: community members (262), STR owners/hosts (118), and business owners (8). The survey was conducted by MRVPD between August 29 - October 5, 2022.

The MRV STR Survey captured a variety of insights, including the benefits community members associate with STRs, STR owner/host offering types, and goods and services businesses provide to STR owners. The top challenges community members attributed to STRs in the MRV were

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<sup>2</sup> Mad River Valley Planning District. (2022). *Mad River Valley Short-Term Rental Survey*.  
<https://cdn.townweb.com/mrvpd.org/wp-content/uploads/2022/12/2022-MRV-STR-Survey-Final-Results.pdf>

Year-Round Housing (Long-term renter displacement) and Community Externalities (Impacts to neighborhood character, Disrespectful guests, Increased noise, and Trash concerns).

Having made substantial progress with step 1(a) of the three-town approach, MRVPD recently evaluated three platforms that offer data collection and analysis tools to better understand the MRV's STR market, transitioning us into step 1(b) Gather Accurate & Unbiased Data. What follows is an analysis and comparison of each platform.

## Data Gaps

Answers are being sought to address the following gaps in the community's understanding of STRs:

1. How many STR units are located in the Mad River Valley / each town?
  - a. Number that are owner-occupied?
  - b. Number that are whole-home units?
2. Where are they located?
  - a. Are they in locations w/ in proximity to services (e.g., villages, resort areas, etc.)?
3. Does unit listing occupancy/use match permitting approvals?
4. How many days/year is the unit rented?
5. What was the prior state of the unit before being offered as an STR?
6. To what extent do STRs impact long-term housing availability?

These questions were developed to better understand the community concerns identified in the 2021 STR Whitepaper & 2022 MRV STR Survey relating to health & safety, year-round housing availability, and community externalities.

## Evaluations

MRVPD explored STR data collection, analysis, and rental activity monitoring software products from three vendors: [GovOS](#), [Deckard Technologies](#), & [Granicus](#). On the whole, each vendor offers a relatively similar approach to STR address identification and monitoring: scan numerous STR platforms for listings, identify each listing and extract information, verify listings and remove duplications, and match listings with owner and address. Some product offerings go beyond the existing task of gathering accurate and unbiased data, including services such as compliance monitoring, permitting & registration, and the provision of a 24/7 complaint hotline. While these services may be of interest in the future, MRVPD's evaluation was primarily focused on address identification and monitoring. In addition to the summaries and analysis below, all proposals are included in the Appendix.

**GovOS, Short-Term Rental Solution:**

MRVPD staff met with GovOS on four occasions (10/3, 10/17, 11/21, & 12/8) to discuss product functionality and pricing. The monitoring and compliance platform provided by GovOS, while offering a comprehensive product and broad functionality, offers products that go beyond the MRV's current goal of data collection. With GovOS, data collection and compliance enforcement are sold as a single product. At this time, drafting compliance is of less concern to the MRV than data collection. This could be a beneficial tool if compliance enforcement were to be explored in the future, but it wouldn't be necessary initially. GovOS facilitates communication with STR owners, records screenshots of active & historical property listings, enables the establishment of a rental registry, provides off-site building inspections, communicates compliance, operates a 24/7 complaint hotline, and features an interactive dashboard for analyzing STR metrics and data. The suite of services provided by GovOS comes as a package and cannot be purchased à la carte. As such, it's likely that, at least initially, some services may remain unused.

GovOS clarified that they are unable to provide any historical data regarding STR activity in the Mad River Valley; the data would begin on the date we began using their services. Put simply, without a historical record of short-term rental activity preceding the present day, it would be difficult to understand any long-term effects that STRs have had on long-term housing in the MRV.

**Deckard Technologies, Rentalscape:**

MRVPD staff participated in a product demonstration with Deckard Technologies (Deckard) on 11/20. Deckard's Rentalscape provides functionality comparable to GovOS, with an emphasis on more raw data vs an organized dashboard. Deckard has the added benefit of an à la carte product structure, ensuring the purchase of only what is needed. Deckard provides Address Identification, Monitoring & Reporting as a single product, with the option to elect the following additional products: Outreach Campaigns, a Registration Portal, a Tax Payment Portal, and a 24/7 Complaint Hotline & Online Forum.

The base tier (Identification, Monitoring, & Reporting) includes the following functionality:

1. Monitoring of 10,000 STR hosting platforms daily.
2. Address Identification.
3. Custom reporting, an interactive listings map, as well as property and listing characteristics such as number of bedrooms, maximum occupancy, rental frequency, rental type, revenue details, and more.
4. A dedicated Account Manager.
  - a. To assist with training and ensure that Town staff follow best management practices.

5. Unlimited seats on the Rentalscape user account.

Deckard has also confirmed that it possesses STR data for the municipalities of Waitsfield, Warren, and Fayston dating back to 2019. This is a significant distinction between Deckard and GovOS.

**Granicus, Host Compliance:**

MRVPD staff participated in a product demonstration with Granicus on 11/30. Staff previously discussed Granicus's offerings in 2022. Granicus offers the same services as GovOS and Deckard, and similar to Deckard, Granicus allows customers to purchase products and services à la carte. Comparing Deckard's Rentalscape and Granicus' Host Compliance, it appears that Granicus offers more in-depth reporting capabilities as well as greater professional support from Granicus staff. For example, Granicus offers Staff Planners as a service to assist towns in creating and enforcing ordinances that match each municipality's unique circumstances and needs regarding STR regulation, should compliance become necessary. This additional administrative support from Granicus could prove valuable if compliance enforcement becomes a consideration for MRV municipalities.

The quote provided by Granicus includes the following functionality at its base level:

- 1) Ongoing monitoring of 60+ STR websites, including major platforms such as Airbnb, VRBO, HomeAway, Booking.com, FlipKey, & Expedia.
  - a. Monitoring occurs every 3 – 5 days at alternating times of day.
- 2) Deduplication of listings into unique rental units.
- 3) Screenshot activity of every listing.
- 4) An Activity Dashboard & Map to monitor trends.
  - a. Each STR unit identified includes over 150 data points to help better understand the local STR market. Data points include: occupancy characteristics, revenue, cleaning fees, date first listed, minimum stay, unit type, rental frequency, and much more.

One noteworthy difference between Deckard and Granicus is that Deckard provides daily data updates, whereas Granicus updates STR data for its customers every three to five days (at alternating times of day). This lower frequency of data collection is unlikely to severely impact the quality of the data provided, but was worth noting for our platform comparison. Granicus does offer daily monitoring as an additional service, but it is not included in its most basic product offering.

Perhaps the most notable difference between these platforms is that Granicus has confirmed the possession of STR data for MRV municipalities dating back to 2015. Access to this level of

historical data would be key to understanding one of the main questions driving this research: to what extent do short-term rentals impact long-term housing in the MRV? Granicus offers four additional years of historical data in comparison to Deckard, which could provide a deeper understanding of the when and where of STR creation.

## Side-by-Side Comparison Charts

This section of this memo consists of several charts providing a side-by-side comparison of each product's functionality and assesses their ability to answer the MRVPD's key STR data gaps.

Key		
✓	X	✓
Included in quote	Not Included	Offered as an Additional Service

**Chart 1. Functionality Offered by Individual Service Providers**

Services	Service Providers		
	GovOS	Granicus	Deckard
Address ID	✓	✓	✓
Deduplication of Listings	✓	✓	✓
Three-tiered Property Verification Process	✓	✓	✓
Historical Data	X	✓ (2015 – Present)	✓ (2019 – Present)
Online Dashboard	✓	✓	✓
Screenshot Activity	✓	✓	✓
Administrative Assistance	✓	✓	✓
Notes Section for each Listing	✓	✓	✓
Communications w/ Owners or Operators	✓	✓	✓
Host Revenue Information & Tax Collection	✓	✓	✓
Compliance Enforcement	✓	✓	✓
Daily Monitoring	✓	✓	✓

**Chart 2. Ability to Answer Key Questions / Data Gaps by Individual Service Providers**

Question	Granicus		GovOS		Deckard	
	Answers	Doesn't Answer	Answers	Doesn't Answer	Answers	Doesn't Answer
How many STRs are in the Valley / individual towns?	✓		✓		✓	
Where are they located?	✓		✓		✓	
Are they in locations near services (e.g., villages, resort areas, etc.)?	✓		✓		✓	
How many are owner-occupied?	✓		✓		✓	
How many whole-home units?	✓		✓		✓	
Does unit listing occupancy/use match permit approvals?	✓		✓		✓	
How many days/year is the unit rented?	✓		✓		✓	
What was the prior state of the unit before being offered as an STR?	✓			X	✓	
To what extent do STRs impact long-term housing availability and price?	✓			X	✓	

**Chart 3. Annual Pricing by Provider & Town**

	Annual Pricing								
	GovOS			Granicus			Deckard		
	Fayston	Waitsfield	Warren	Fayston	Waitsfield	Warren	Fayston	Waitsfield	Warren
Individual Price	\$20,000	\$20,000	\$24,000	\$6,903	\$6,903	\$14,020	\$4,700	\$3,000	\$14,000
Group Discount				\$4,832	\$4,832	\$9,814			

## Charts 4 - 7. Cost per STR Unit Analysis by Service Provider

This analysis was developed to create a more apple-to-apples comparison of the platforms on a cost per unit basis. Estimated # STR Units = the mean number of units provided by the three companies. Cost Per STR = Platform Cost / Estimated STR Units.

**Chart 4.**

	GovOS Price Per Unit		
	Fayston	Waitsfield	Warren
Platform Cost	\$20,000	\$20,000	\$24,000
Estimated # STR Units	155	75	451
Cost Per STR	\$129	\$267	\$53

**Chart 5.**

	Deckard Price Per Unit		
	Fayston	Waitsfield	Warren
Platform Cost	\$4,700	\$3,000	\$14,000
Estimated # STR Units	155	75	451
Cost Per STR	\$30	\$40	\$31

**Chart 6.**

	Granicus Price Per Unit (Individual Price)		
	Fayston	Waitsfield	Warren
Platform Cost	\$6,903	\$6,903	\$14,020
Estimated # STR Units	155	75	451
Cost Per STR	\$45	\$92	\$31

**Chart 7.**

	Granicus Price Per Unit (Group Discount)		
	Fayston	Waitsfield	Warren
Platform Cost	\$4,832	\$4,832	\$9,814
Estimated # STR Units	155	75	451
Cost Per STR	\$31	\$64	\$22



## Platform Recommendation

Recommending a platform greatly depends on each town's primary goal with respect to understanding the activity and impact of STRs. While certain community-wide goals have been previously identified, each town must consider its role in understanding the overall Mad River Valley short-term rental market, as well as what platform would suit those goals best.

In terms of understanding the health & safety concerns identified in the Mad River Valley Planning District's (MRVPD) 2021 whitepaper, *Short-Term Rentals in the Mad River Valley*, all vendors offer a solution to address this topic. The following paragraphs explain each vendor's ability to address the other two concerns identified in this whitepaper: community externalities and year-round housing.

Staff found that GovOS would be an ideal choice for a municipality that is ready to begin STR monitoring *and* compliance, but is considerably more expensive than Granicus and Deckard. GovOS explained that initially, compliance could be as simple as an outreach campaign to STR owners/managers to create an STR registry. This would provide the opportunity to facilitate STR registration, communicate with property owners, and allow time to understand the STR data and trends before evaluating whether additional compliance is needed. If municipalities plan to require a registration fee, much of the platform acquisition cost could be offset, but certain services (e.g., tax collection and compliance) included in the quote provided by GovOS would remain unused initially. The main benefit we found with the GovOS proposal is that it includes communication (e.g., initial outreach & 24/7 complaint hotline), registration, and payment collection on behalf of the municipality. The communication with STR owner/operators offered by GovOS makes it slightly more capable in terms of understanding the current community externalities of STRs in the MRV through its complaint hotline and tracking system. The main limitation that we found with GovOS is its lack of historical STR data for MRV towns. The absence of historical data makes the prospect of understanding any long-term impacts resulting from STRs in the MRV unlikely.

From a cost perspective, Deckard & Granicus offers the most competitive pricing as well as all desired product functionality. That said, it is worth noting that if the towns intend on charging a registration fee to help cover costs associated with the purchase of an STR monitoring platform, the pricing of Granicus and Deckard does not reflect any assistance for outreach to STR owners or the collection of corresponding registration fees. This process could prove to be a time and resource constraint for the towns (and MRVPD if it participates in the municipality's endeavor), so it is important to understand each town's intent when selecting a service provider. Deckard and Granicus offer outreach and registration as an optional service, which would incur additional costs.

If the primary goal of MRV towns is to understand how STRs have impacted long-term housing and housing affordability, Granicus's historical data going back to 2015 provides the greatest opportunity to answer this question. While Granicus's individual is priced more similarly to Deckard, they offer a 30% discount if Warren, Waitsfield, and Fayston all elect to engage in

address identification collectively. This would make it more affordable than Deckard in some cases. Considering the greater historical data held by Granicus, the optional 30% discount, and the professional administrative support available for potential future compliance drafting, MRVPD believes that Granicus would be best suited to help understand the impact of STRs on housing availability & affordability.

No matter the platform, any STR effort will require local resources. MRVPD is committed to supporting its towns and is happy to explore opportunities to assist in their future STR efforts. That role could include data analysis, communication, coordination, etc.

In summary, all STR vendors offer similar products with some important nuances. GovOS bundles address identification & compliance into a single product, resulting in a cost substantially higher than the other vendors. While GovOS is unable to provide historical STR data for MRV towns, it could provide real-time insight into the community externalities of STRs through its facilitation of a complaint hotline. Deckard is the most affordable option, offers insights pertaining to all data gaps, and has confirmed possession of STR data dating back to 2019 in the MRV. Granicus is similarly priced to Deckard, addresses all data gaps identified by MRVPD, and possesses an additional four years of historical STR data. While all vendors would provide similar products, these differences should be considered when making a decision.

MRVPD appreciates the opportunity to undertake the above STR platform evaluation on behalf of its three towns. We are happy to continue this dialogue and are available to attend a future Planning Commission meeting to discuss further. Please don't hesitate to reach out.

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