



2020 Vacation Rental Property Operations Report





THE REPORT

We surveyed hundreds of vacation rental managers and operators to measure how professionals are enhancing their property care programs to better deliver predictable, safe and high-quality vacation rental experiences in 2020 during travel's new normal.

TABLE OF CONTENTS

Introduction	02
Methodology	03
KEY FINDINGS	
Guest Behavior and Expectations	04
Cleanliness and Sanitation	06
Safety and Communication	09
Quality Assurance and Preventative Maintenance	13
Technology and Tools	16
Conclusion	18

Introduction

Delivering the detailed property care and service that vacation rental guests demand is challenging. Managers are inundated with operational tasks; from scheduling work, coordinating teams, monitoring compliance, tracking property details, and communicating with clients. Meeting detailed standards across unique properties isn't easy, and without smart tools and processes, there's no guarantee that work won't fall through the cracks.

Now more than ever, the health and safety concerns of 2020 and the pandemic have underscored the need for highly controlled property operations that can be validated and shared with clients. We surveyed hundreds of vacation rental managers to take pulse of how professionals plan on strengthening processes for guest and owner communication, housekeeping workflows, compliance with cleanliness and safety standards, and internal tracking and reporting.

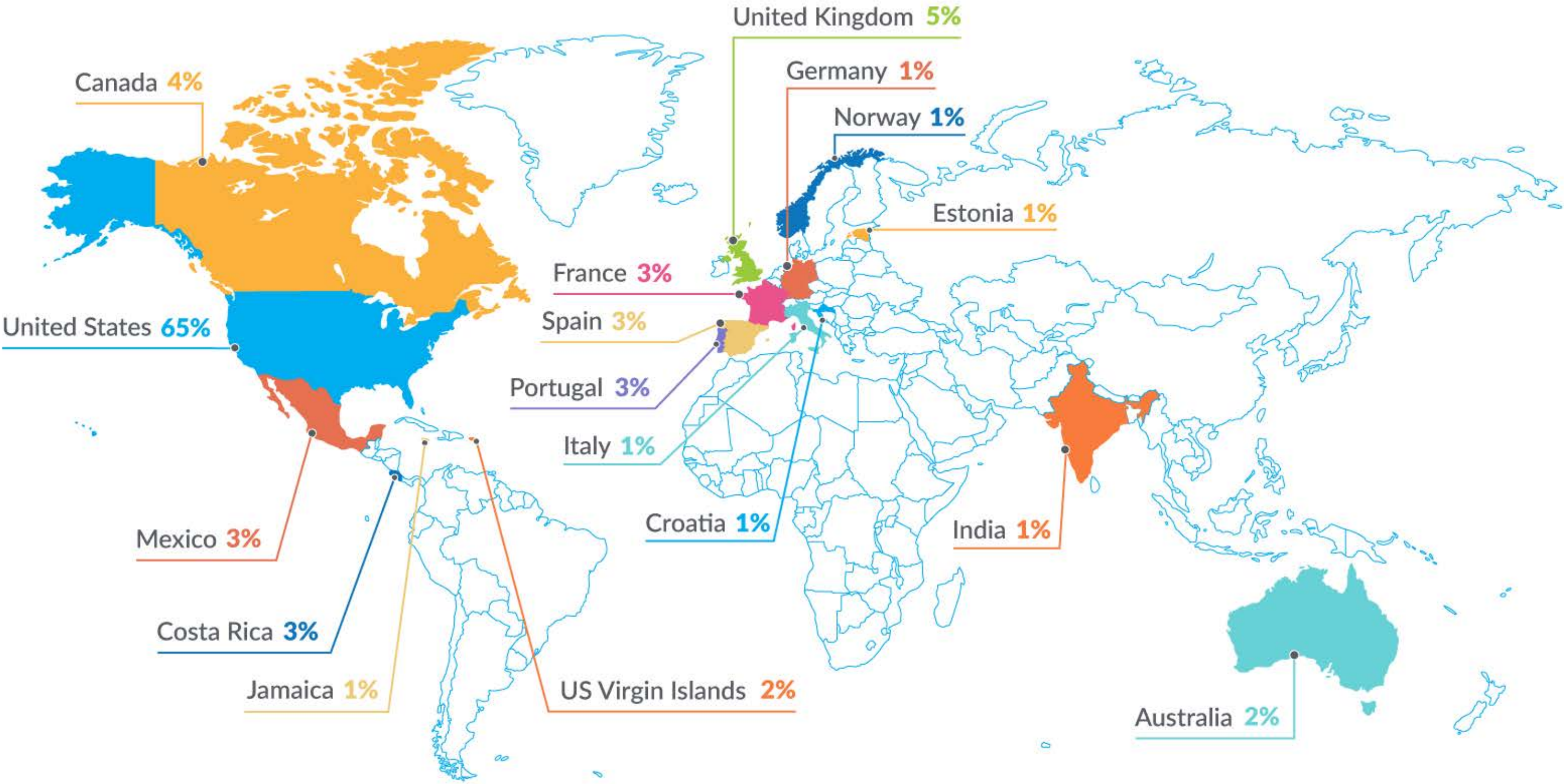
As you'll see throughout this report, the narrative of 'professionalism' is the main underlying theme in our findings, and illustrates the approach managers are taking as they rethink their operational processes, housekeeping protocols, and remote work coordination. We hope this report provides insights to help you meet the elevated expectations of your guests and owners, and deliver a more professional product that differentiates your brand.



Methodology

We surveyed over 200 professional vacation rental managers to compile this 'Property Operations' report. Our respondents came from over 17 countries in 5 continents, though 65% operate the majority of their vacation rentals in the United States. Portfolio sizes also vary, with 44% managing at least 40 unique properties and 26% managing over 100 properties.

 LOCATION



Guest Expectations & Behaviors

As people emerge from shelter-in-place orders with an itch to move, explore, and reconnect, many are making travel plans for the second half of 2020. In fact, Airbnb reported that its guests booked more than one million nights globally on July 8th, passing the million booked-nights mark for the first time since March 3rd.

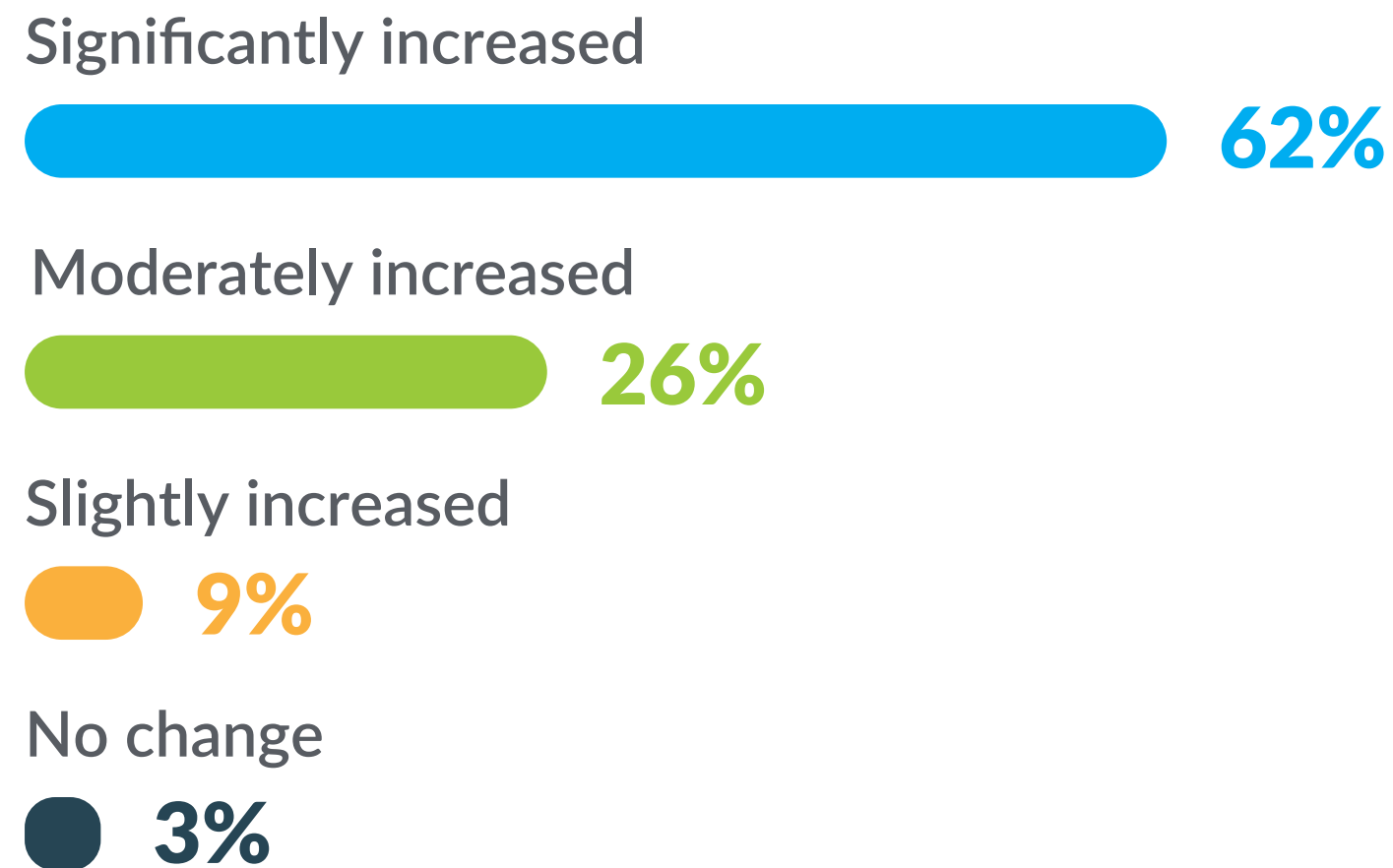
The uptick in reservations doesn't mean a return to normal though, as continued social distancing has shaped a new traveler persona. **97% of vacation rental operators think guests have increased sensitivity towards cleanliness and safety**, and feel that guest behaviors in the future will look different than those in 2019. Travelers are gravitating towards professional, predictable, and safe places to stay; such as drive-to markets in lower density locations (e.g. rentals near beaches, lakes and mountains).

In fact, **66% of professional managers think cleanliness and safety are the most important considerations at booking**, beating out location and price. Professional operators are hypervigilant of property preparation and maintenance, and more attentive to check-in, property layout, and cleanliness of high-touch surfaces. Facilitating easy communication and access to amenities are also more important. Understanding and accommodating these shifting behaviors will be a critical point of success and failure for professional hospitality providers moving forward.

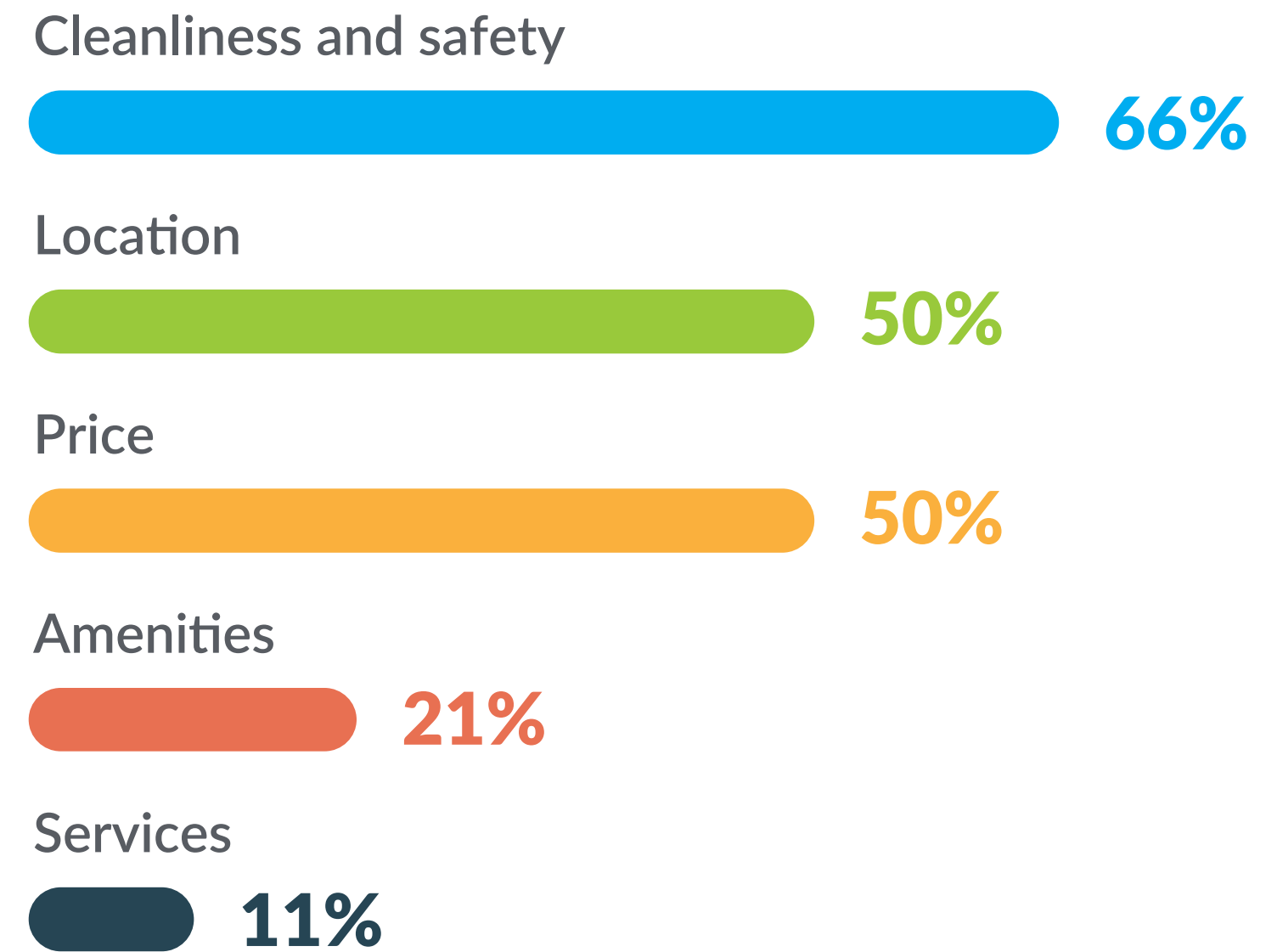




How do you think guest feelings about cleanliness and safety have changed since COVID-19?



Following COVID-19, which will be the most two most important guest considerations at booking?



97%

think guest feelings about cleanliness and safety have increased since COVID-19

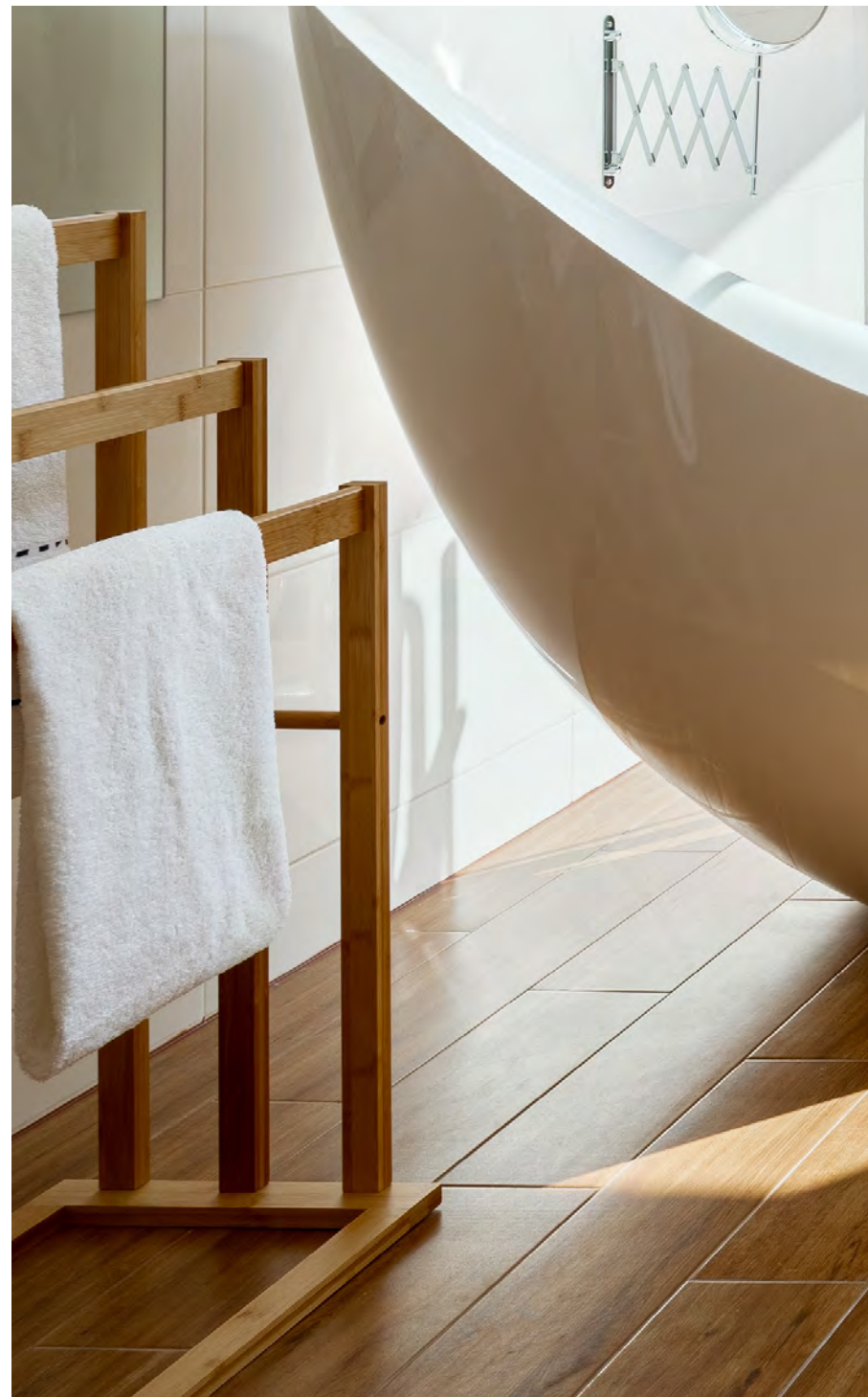
62% think they have significantly changed



66%

think cleanliness and safety will be the most important booking factors

beating out price, location, and amenities



Cleanliness & Sanitation

While professional vacation rental operators have historically been focused on appropriate cleaning standards for their units, cleanliness and sanitation have taken center stage within the vacation rental industry since March.

99% of managers plan on making some sort of change to their property care programs; from strategy and protocols, internal communication, time allotted to housekeepers, items cleaned, and products used. As detailed cleaning becomes one of the most critical pieces of property care, following comprehensive cleaning protocols between each stay has become the industry's baseline standard.

Customizing checklists for each property is a popular way to help housekeepers follow brand standards - a management tactic which 49% of managers were already doing prior to COVID-19. An additional 30% of managers plan on doing so as bookings return, as it gives them more control and visibility to ensure each property is guest-ready. Better yet, **75% of managers are augmenting the items on their checklists to include guidance from health authorities.**

? Before COVID-19, which procedures were you using in your housekeeping programs (select all that apply)?

Using housekeeping checklists for brand standards



Disinfect and sanitize all high touch surfaces at each property



Cleaning all linens and laundry at commercial-grade facilities



Customizing housekeeping checklists for each property



Using products and techniques based on guidance from health authorities and local regulations



Using different checklist requirements for turnovers



99%

Are making changes to their housekeeping programs following COVID-19



82%

Plan on disinfecting and sanitizing all high-touch surfaces (up from 50%)



79%

Plan on customizing housekeeping checklists for each property (up from 49%)

? Following COVID-19, which procedures do you plan on using in your housekeeping programs (select all that apply)?

Disinfect and sanitize all high touch surfaces at each property



Supplement existing procedures with new guidance from health authorities and local regulations



Extend cleaning time between existing turnovers



Add the use of disinfectant sprayers or foggers



Incorporate a waiting period (i.e 24 hours) between guests



Using housekeeping checklists for brand standards



Customizing housekeeping checklists for each property



Clean all linens and laundry at commercial-grade facilities



Using different checklist requirements for turnovers



Track cleaning task time and work performed



Leave beds unmade with clean linens for guests to make up



Leave towels wrapped in sealed plastic



Safety & Communication

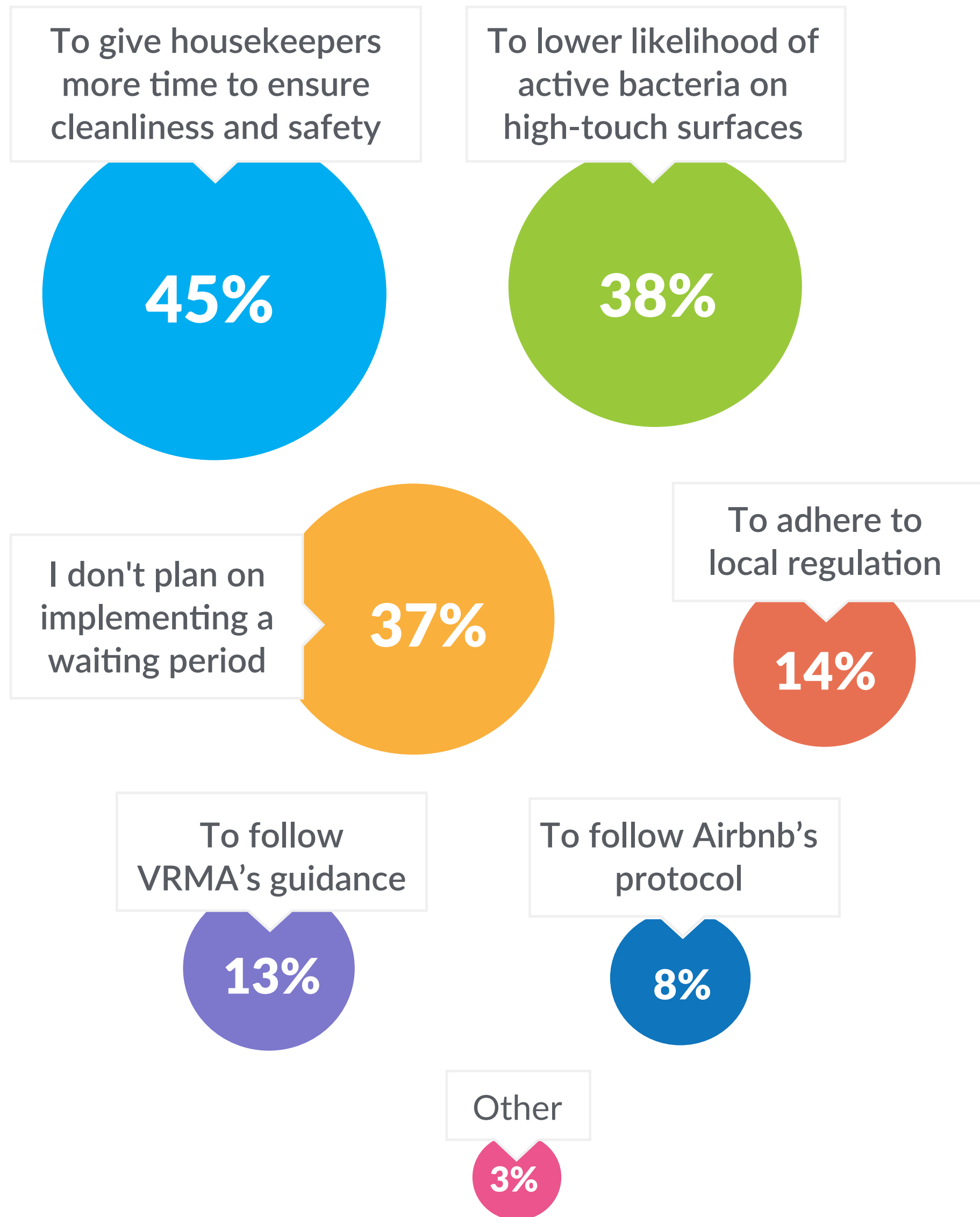
The correlation between guest safety and property cleanliness is stronger than ever before. 'Safety' not only encompasses the hygiene and well-being of guests, but also routinely inspecting properties for proper physical safety features, including smoke alarms, carbon monoxide detectors, and trip and fall hazards.

95% of professional vacation operators plan on implementing changes to help guests feel more confident in the safety of their rentals. This includes performing routine safety inspections, providing guests with disinfectant and additional cleaning products, and implementing a waiting period between stays. Adding buffer periods between stays has been a hotly debated topic among industry operators, but 42% plan on doing so in order to give housekeepers and staff more time to complete enhanced cleaning procedures, and to better adhere to guidance from leading regulators and authorities.

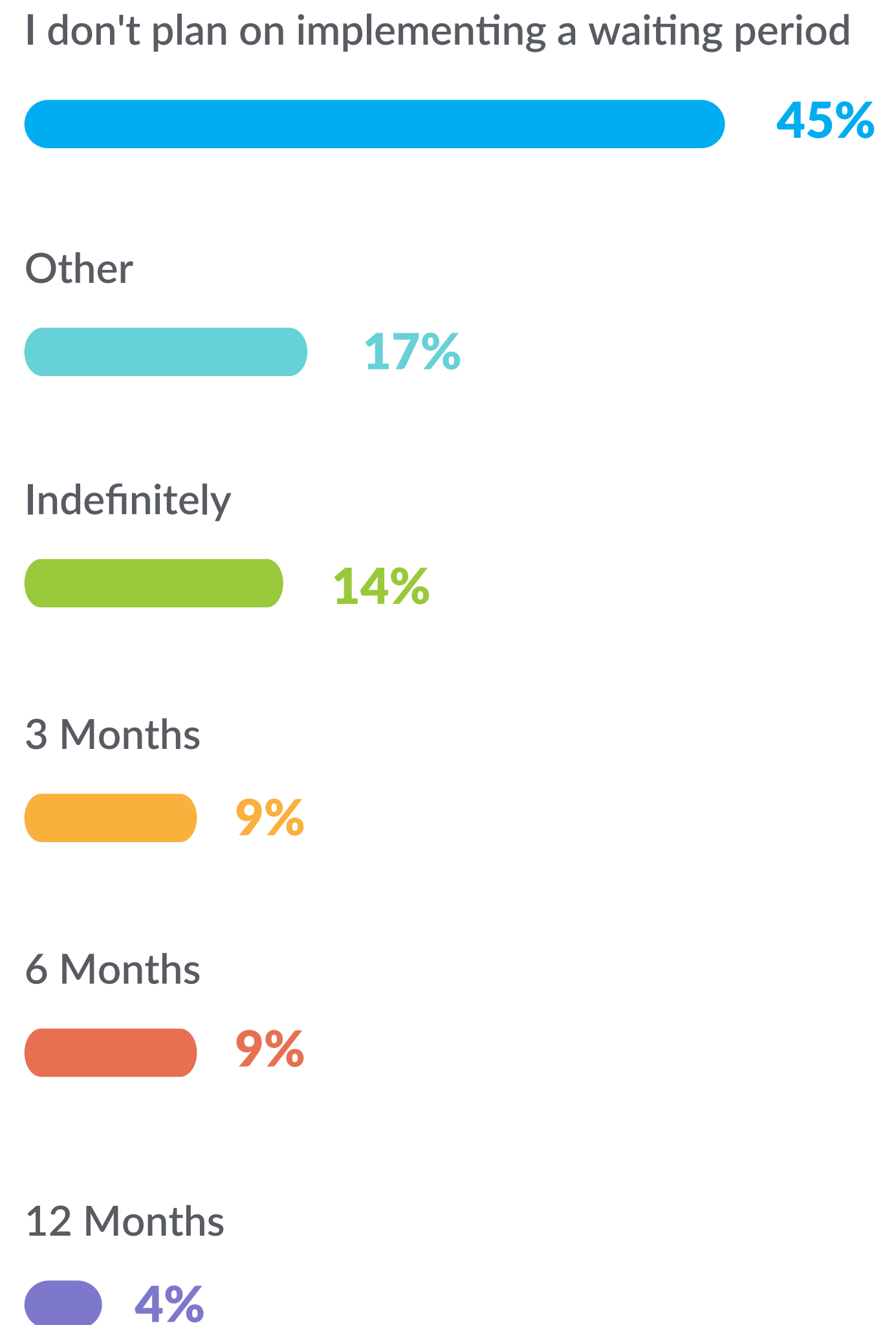
Communicating with guests before arrival and throughout the stay on safety and health protocols is another top priority for managers. **74% of managers surveyed plan on adjusting their communication strategies in hopes to put guests at ease** and set the stage for a great experience. Reporting safety protocols to owners is another important element, and demonstrates the full value of professional management services.



? If you are implementing a waiting period between guests, what are your reasons for doing so (select all that apply)?

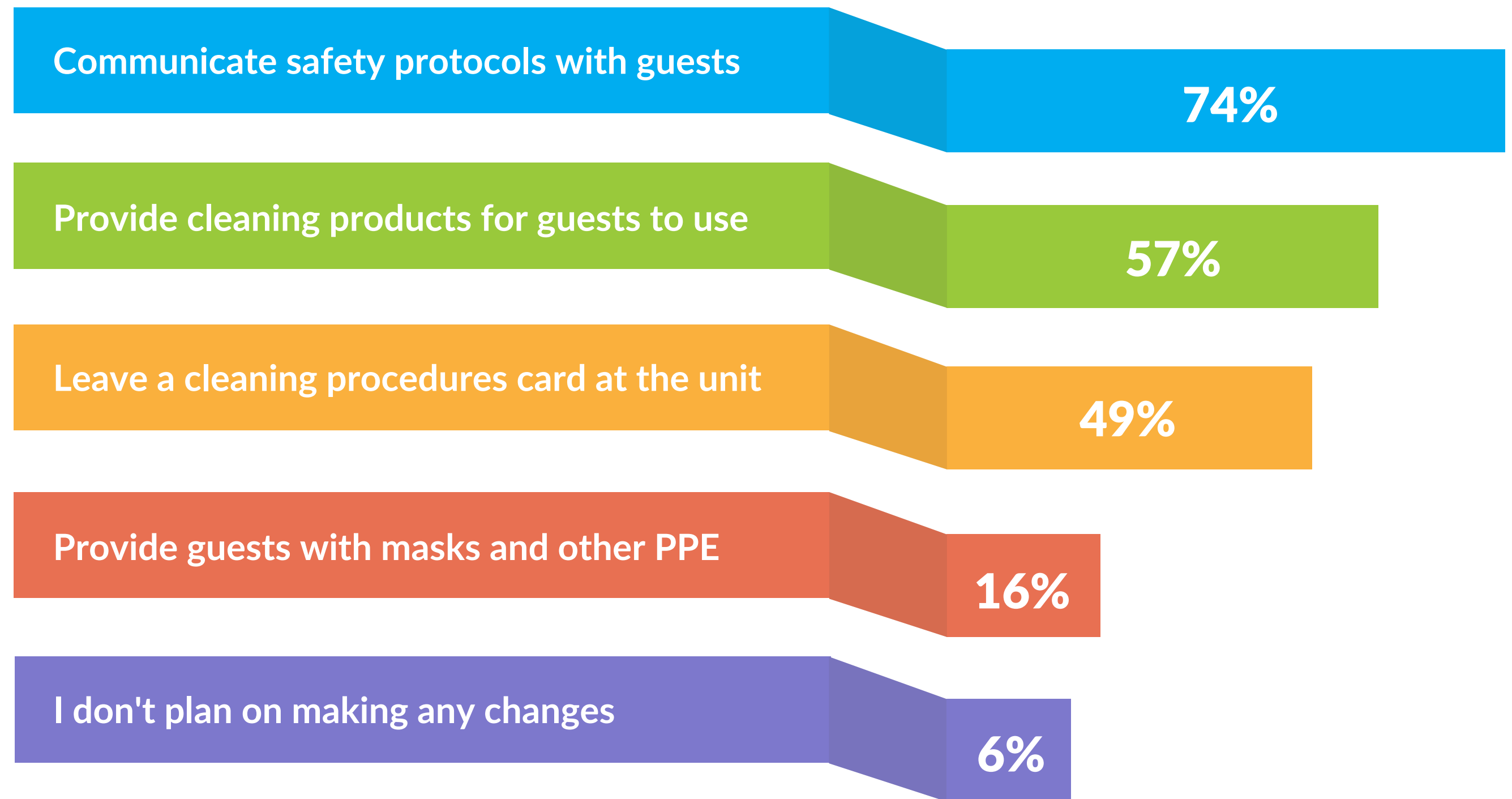


? If you are implementing a waiting period between guests, for how long do you plan on doing so?





What changes will you make to help guests feel more confident in the safety of your rentals (select all that apply)?



How do you plan on highlighting your cleaning and safety procedures to guests and homeowners (select all that apply)?

Update marketing website with details on cleaning procedures



Add 'cleanliness' to amenities on each property listing



Communication to owners regarding cleaning and safety protocols



Compliance with individual safety reviews



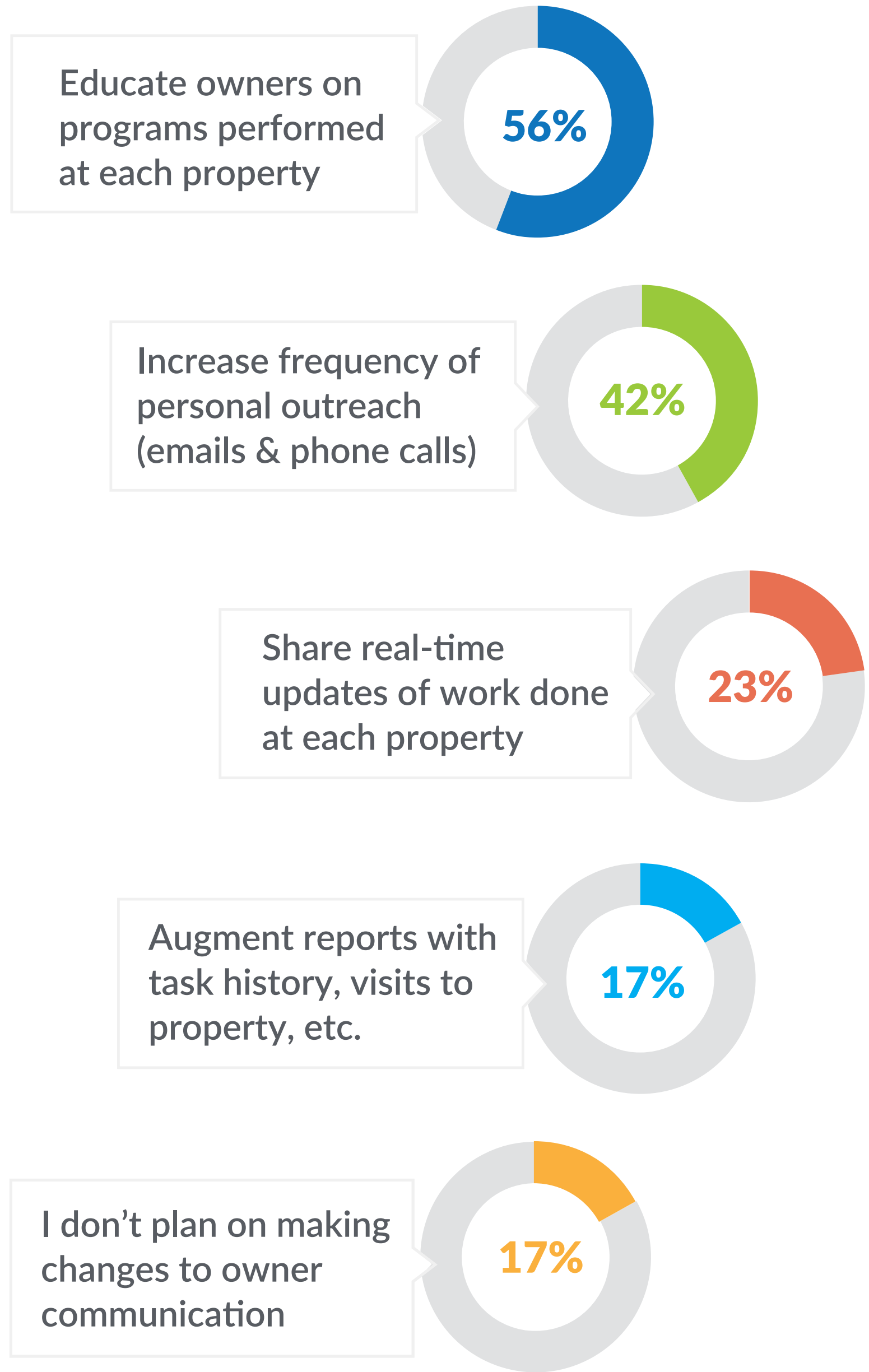
Proactively messaging guests with information about COVID-19



I don't plan on making any changes



? What steps are you considering to communicate the value of your services to owners (select all that apply)?



63%

Plan on implementing a waiting period in between stays (14% to do so indefinitely)



94%

Plan to make operational changes to make guests feel more confident



56%

Plan to educate homeowners on the customized work done at each property

Quality Assurance

Ensuring your properties are ready for each check-in is one of the most challenging aspects of vacation rental property management. Even if you've smartly assigned a cleaning job to an in-house or contracted housekeeper, providing prescriptive instructions and gaining visibility into the quality of their work are difficult to do. Add in personalization for guest-requests or compliance with unique property features, and the problem is even more challenging. Layer scale and lots of properties on top, and it's exponentially more difficult.

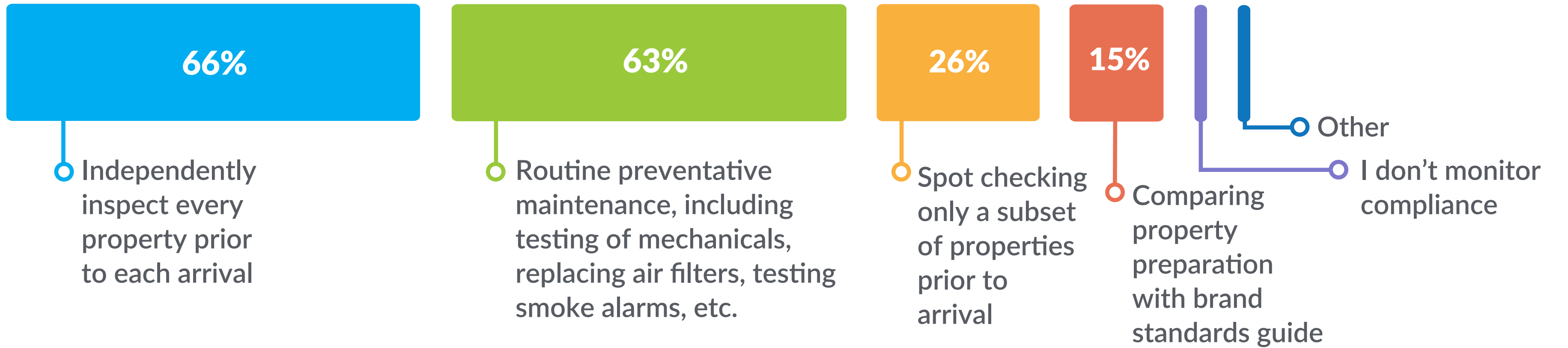
Using internal systems of record to track and verify compliance with cleaning protocols, safety and property care has become standard practice for many vacation rental operators. **In fact, over 83% of professional managers plan on enhancing their quality assurance programs**, with the majority independently inspecting every property before guest arrival. Creating and implementing a brand standards guide is another popular change, and provides more control over interactions at each property.

When performed correctly, quality assurance protocols have several downstream benefits. Professional operators who capture in-the-field interactions from inspection programs are able to build property profiles that become more comprehensive with every inspection. Leveraging data like task history, number of visits to each property, and maintenance records helps unlock the full potential of property management services.

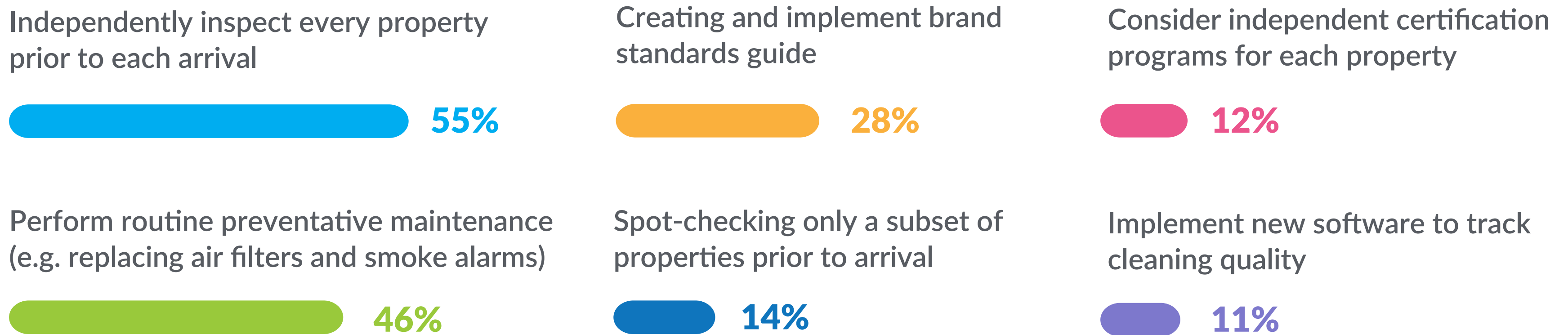




Before COVID-19, how did you monitor compliance with cleanliness and safety standards (select all that apply)?

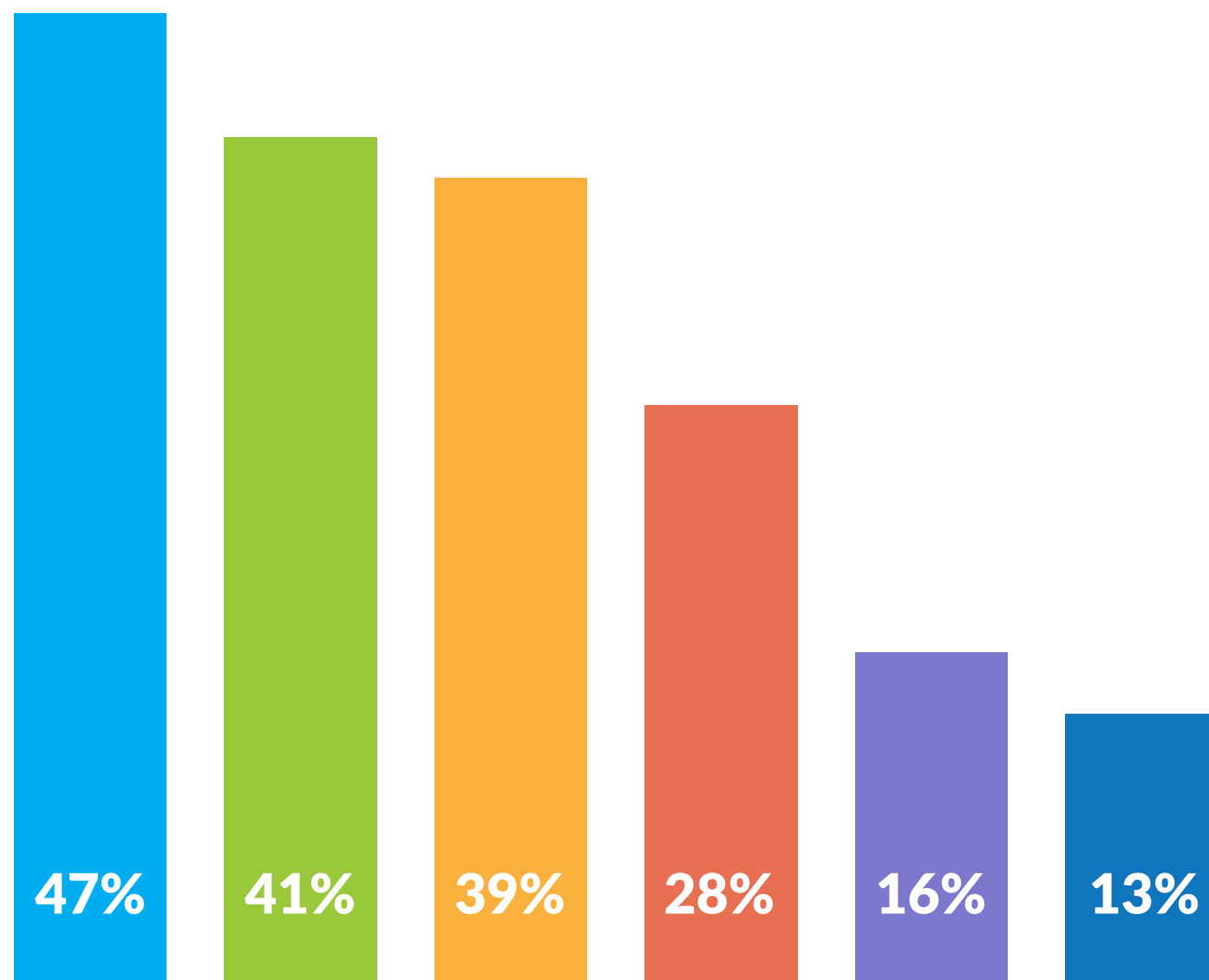


Following COVID-19, what changes will you make to monitor compliance with cleanliness and safety standards (select all that apply)?





What steps are you considering to improve your safety and maintenance procedures (select all that apply)?



- Market safety protocols to guests
- Review each property for brand compliance
- Use checklists to inspect safety items
- Increase frequency of recurring inspections
- I don't plan on making any changes
- Certify safe rentals through independent programs



84%

Plan on taking steps to improve their safety and maintenance procedures

47% of those are marketing safety protocols to guests.

“

Breezeway has provided a streamlined task management system and allows our company to easily ensure consistent quality for our guests.

Two Pines Properties
Big Sky, MT



Technology & Tools

Twenty years ago, vacation rental managers had limited choices as to which software to adopt. Systems were complex, and property managers gravitated to all-in-one solutions to operate all facets of their business. Managers filled the operational gaps with manual processes (scheduling tasks from reservation reports, using paper checklists to perform quality assurance, and communicating issues through text threads) -- work-arounds that many managers still use today.

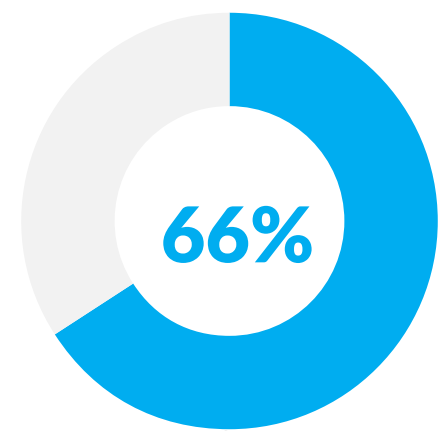
As the job changes from valuing the transaction (marketing and facilitating the rental booking) to emphasizing the experience (offering services and crafting the perfect vacation), managers are gravitating to purpose-built tools. Now, there are hundreds of property management software platforms and an ecosystem of ancillary technology that enables vacation rental managers to work smarter.

COVID-19 has propelled property care and operations software to the forefront. In fact, the majority of managers feel that cleaning and operations is the most important area of focus for their business over the next year, and **49% of managers feel that property care and operations software will be the most helpful technology** (beating out reservation management software, dynamic pricing, channel partner management, and more).

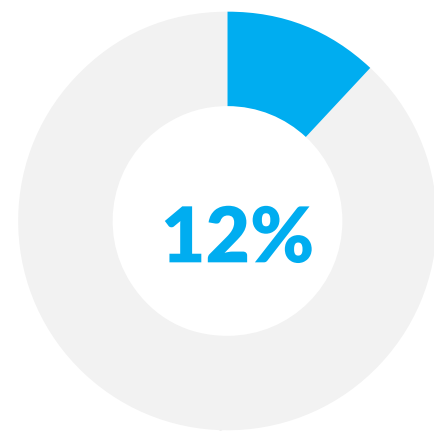




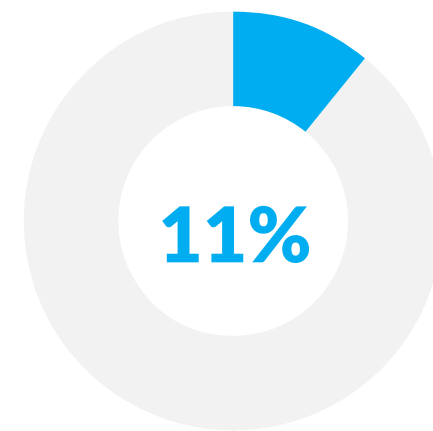
Going forward, how will you track property care, monitor staff, and ensure compliance of safer properties (select all that apply)



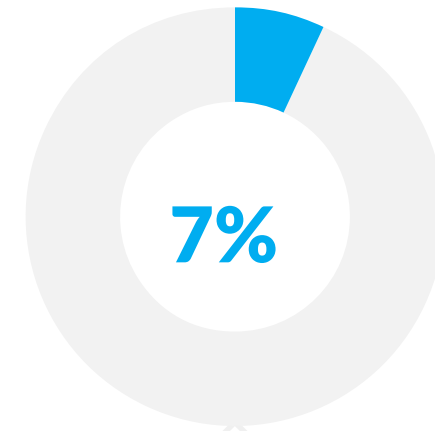
Strengthening processes



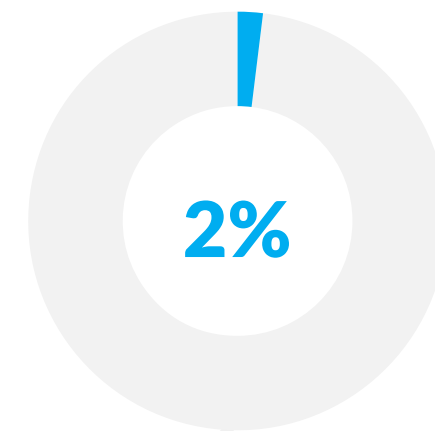
This is not a priority



Property care software



Other



Switching PMS systems



What area is most important for your business over the next year?

Cleaning and operations



Owner acquisition



Digital marketing



Safety and compliance



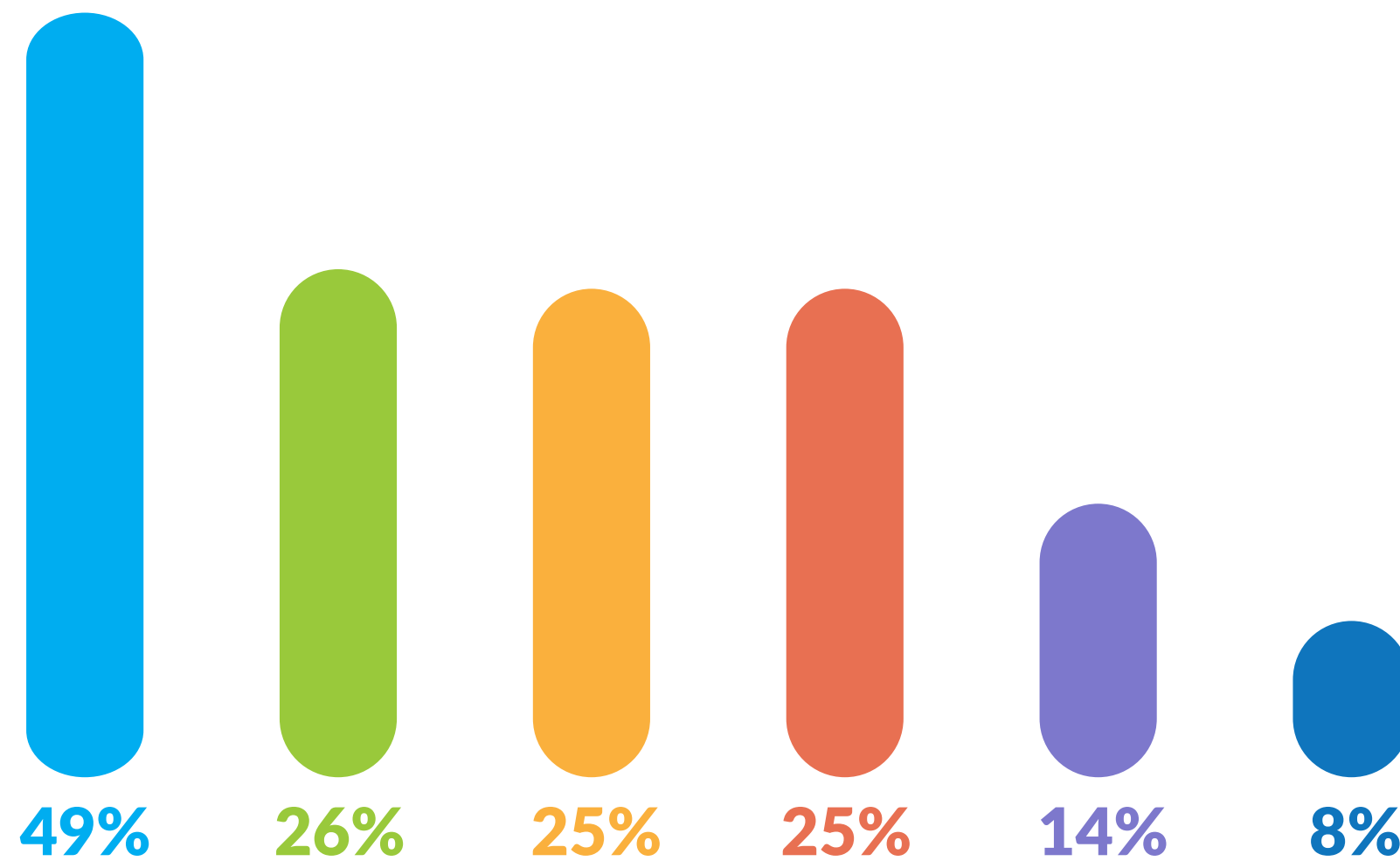
Dynamic pricing



Listing distribution



What types of technology will be most helpful for your business following COVID-19 (select two)?



- Property care software
- Dynamic pricing
- PMS
- Channel partner
- Business analytics
- Other



Conclusion

COVID-19 has not only changed the way people travel, but how they interact with physical space. Today's guests now demand a true hospitality living experience when traveling, with properties maintained to heightened standards - cleaner, safer, and more amenities than ever before. These elevated consumer expectations increase the demands placed on hospitality operators, adding to the existing challenges of servicing unique properties, multiple locations, frequent requests, and doing so with fluid and unpredictable scheduling needs.

The problem of ensuring such strict cleanliness and safety across properties has never been more critical to the success of professional vacation rental operators. Marketing channels have leveled the playing field and de-emphasized the importance of finding renters. Service has become the new special sauce that differentiates brands in competitive markets, which is predicated on running best-in-class back-end operations.

This report illustrates the industry's re-focus towards back-end property operations and guest services, and the strategies professional operators are using to accommodate the 'new normal' demands of vacation rental hospitality.



ABOUT BREEZEWAY

Breezeway is the leading software platform for short-term rental cleaning and service operations. Started in 2017 by Jeremy Gall, founder of FlipKey (sold to TripAdvisor), to help hospitality providers and short-term operators deliver predictable, safe and high-quality experiences at unique properties.

Breezeway integrates with 30+ software systems and IoT devices to help short-term rental operators, long-term residential managers, resorts, cleaners and service providers, and other hospitality professionals care for property and meet detailed service standards. Over 500 clients in 15+ countries leverage Breezeway's software to execute their property care and service programs and deliver exceptional hospitality experiences.

To contact us or learn more, visit
[Breezeway.io](https://breezeway.io)