



The 2023 Guest Communication Study

WHAT INFLUENCES GUEST SATISFACTION, REVIEWS & SPEND



Touch Stay

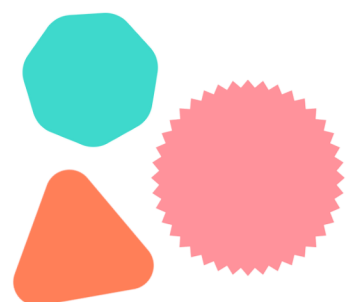


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Communication & travel open our eyes to what's possible.

Without communication how would we have come to understand there's a world to explore beyond our own communities? At Touch Stay, we power communication between operators (owners, hosts, managers) and travellers.

We began with our own perspective - that of guests long forgotten once the rental fee had been paid and processed. And we've drawn on the experiences of operators to ensure we understand both sides of the host-guest relationship. In 2023, 3 million guests will have the information about their stay delivered by our digital guidebooks.

Every day, we hear from users of another guest who's mentioned their guidebook in the review they left. We hear how inbound calls have dropped by 40% since introducing guidebooks. The best customer description recently? "It kills the calls".

Yet communication doesn't pique interest like revenue growth or pricing strategies.

And while we know how intrinsic communication is to the value guests associate to their stay, to their likelihood to buy upsells, and to their inclination to leave both a rave and brimful review of actual use to future guests, we suspect not every operator appreciates this yet.

And worse still, we suspect that not every guest comprehends the greater value they could extract from their stay if their host communicated better. (Not necessarily more, but most definitely 'better'.)

So in July 2023, Touch Stay surveyed 2,024 vacation rental guests about an under-studied yet essential aspect of the guest experience: the communication they received from their hosts before, during and after their trip.

This report provides an overview of the results, covering the frequency, format, and clarity of communication guests received during their most recent stays — as well as a peek into how memorable, helpful, and satisfying they considered it to be.

The findings reveal real guest experiences, expectations, and preferences. Facts and feelings.

They provide actionable insights to help you elevate your guests' experience, your reputation, your review scores and your bottom line.

We think you'll be intrigued by what we found.

Who we asked

Survey conducted by YouGov on behalf of Touch Stay in July 2023.

2,024

vacation rental guests
based in the USA

43%

identified as male

57%

identified as female

4%

18-24 years old

16%

45-54 years old

18%

25-34 years old

41%

55+ years old

21%

35-44 years old

Key findings

Two thirds

of guests receive 1-2, or **no** communications from their host

69%

of guests said communication influenced their likelihood to leave a positive review

More than a fifth

of guests were missing information

67%

of guests want self check-in

44%

prefer mid-stay communication via text

Less than half

of guests felt “very well looked after”

Quantity never trumps quality. That’s very much the message these 2,024 guests gave us, including a pronounced sweet spot for the number of communications that drive guest satisfaction.

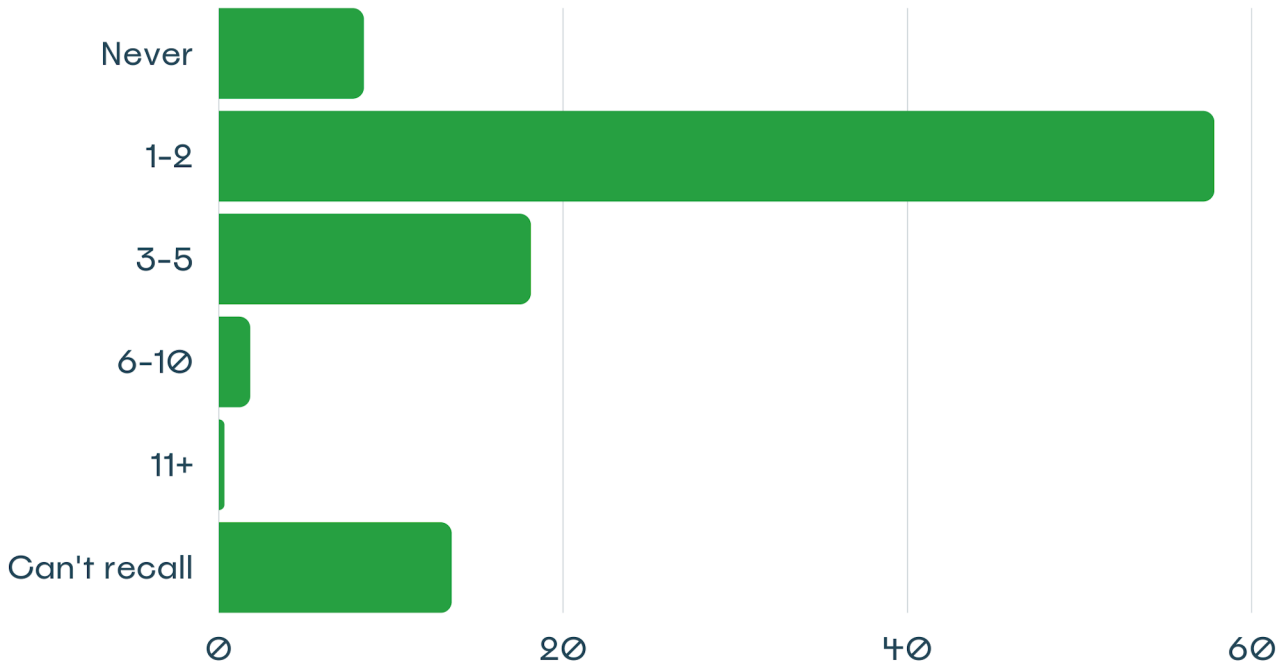
The majority of guests are currently feeling under-loved and under-cared for. However, the gap between the level of guest communication they received and that sweet spot of satisfaction isn’t an overwhelming void. The opportunity to improve the guest experience is achievable for all.

Clear opportunities present themselves for operators to communicate a little more, and in turn, achieve revenue gains. In fact, just a few additional interactions could significantly impact guest satisfaction levels even before they’ve arrived.

What’s more, the data qualifies the influence communication has on positive reviews.

And if you’re wondering what to communicate, via which means, and when, then the answer is in the following data too.

How often hosts communicate



According to the experiences of the 2,024 vacation rental guests surveyed, very few had much communication with their host. Most guests (58%) received just 1-2 communications - 66% heard from their host once, twice, or... never.

These numbers suggest that much of the communication between hosts and guests is limited to purely functional — or forgettable! — info, such as check-in/out instructions and WiFi passwords.

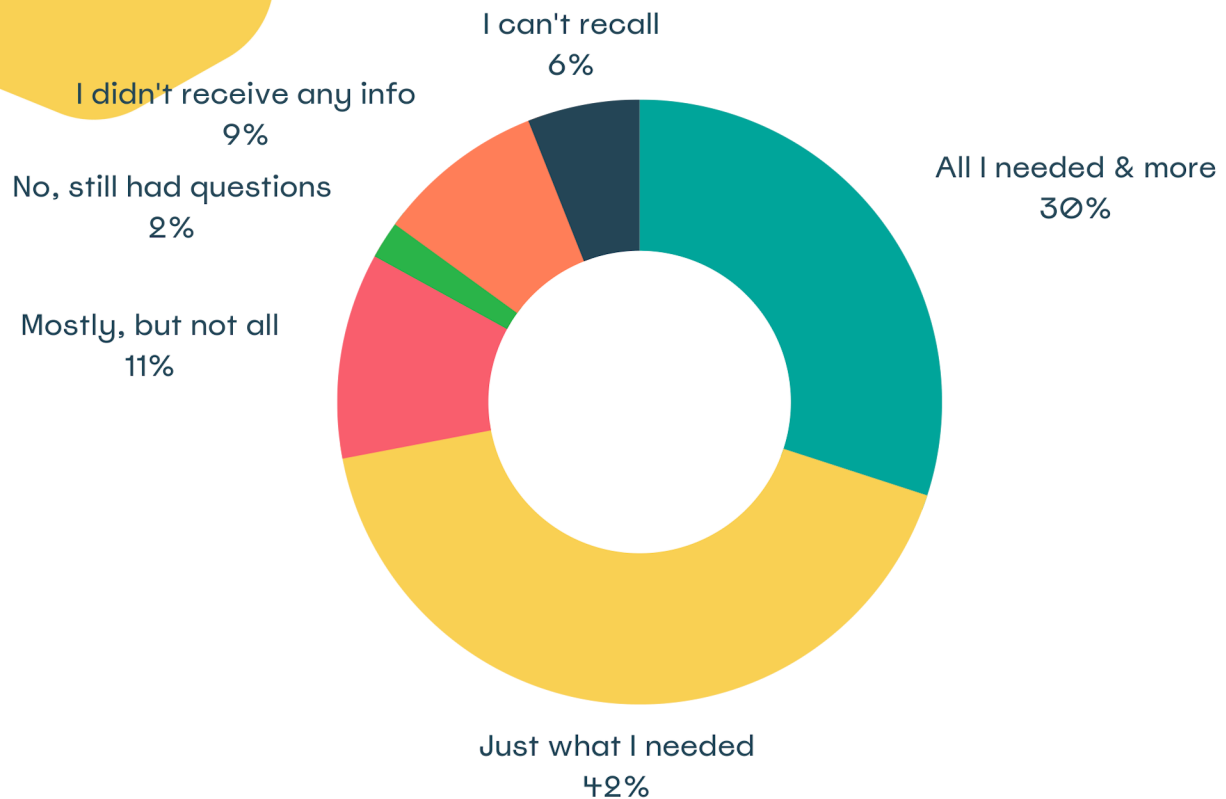
What else can be conveyed deeply, meaningfully, memorably in so few messages? And what impact did that have on their trip - positive or negative? How did it limit (if at all) what they were able to do while away? And how did it influence their overall opinion?

Beyond guest satisfaction, the data also provides insights on margin improvement opportunities via upsells, brand advocacy, referrals and repeat bookings.

66%

of guests received 2 or fewer communications from their host

How much is enough?



Knowing that each travel experience is individual, we asked guests if the number of communications received was enough to meet their needs.

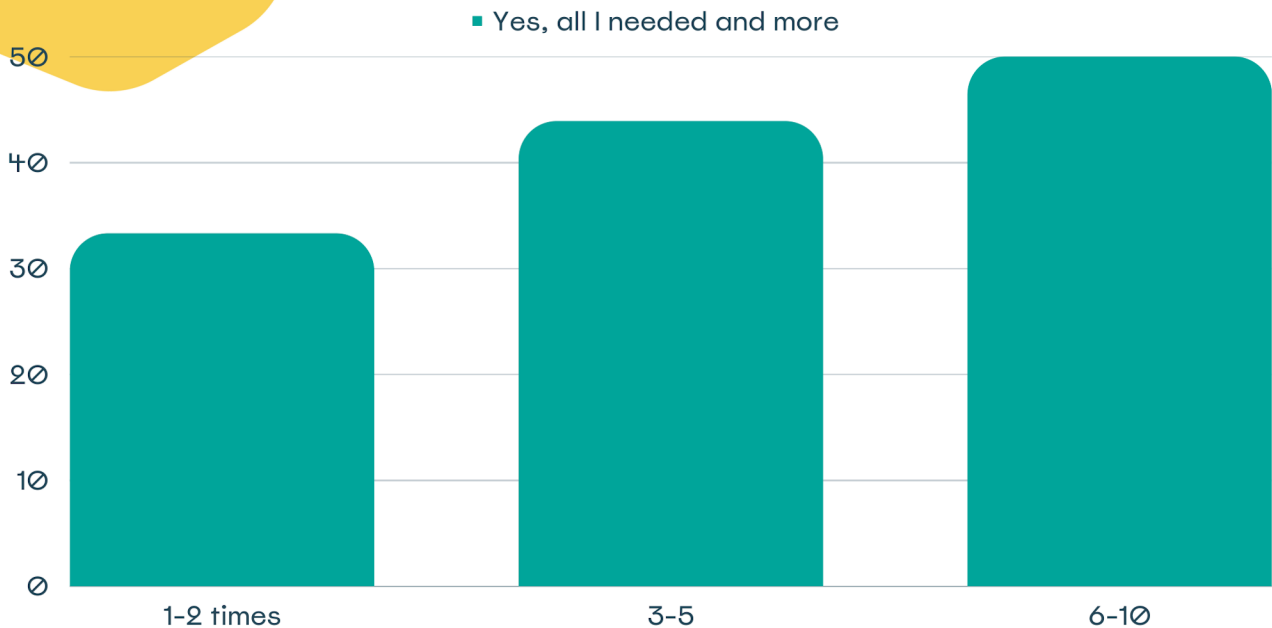
The purpose of this question was to more deeply appreciate whether the quality of information provided balanced out the quantity. But also to assess pure need, rather than information wished for, or nice to have.

The data revealed that more than a fifth (21%) of guests didn't have all the information they needed.

This supports our own experience when talking to operators in the short-term rental space: that guests ask a lot of questions, often very basic 'silly' questions, placing a burden on time-poor operators.

More than a fifth
of guests are missing
information they need

Does more = happier?



Guest satisfaction increases when operators communicate more

Delving deeper, we wanted to investigate whether there is any correlation between the number of times the guest was contacted and their satisfaction level.

There is...

We asked: *“Did the information that the host shared with you after booking the short-term vacation rental provide everything you needed?”*

Only one-third (33%) of guests who received 1-2 communications reported that their host went above and beyond - providing all the information they needed and more.

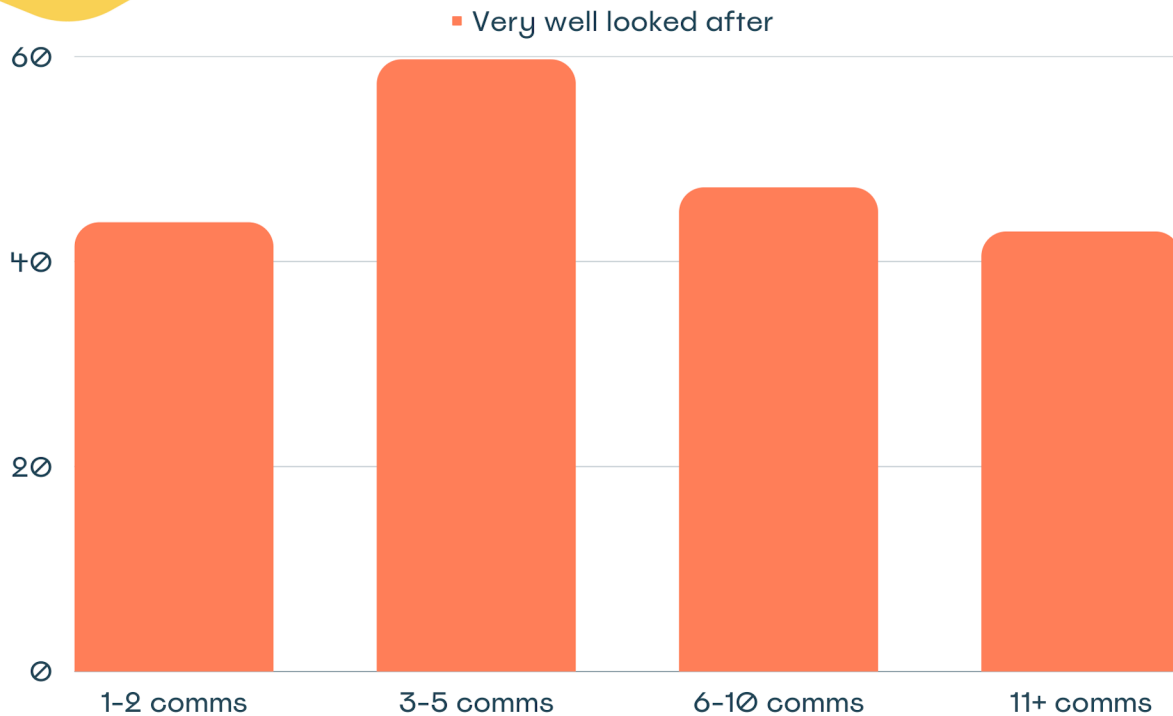
That number jumps to 44 per cent after 3-5 contacts, and again to 50 per cent after 6-10 interactions.

An “above and beyond” evaluation is more likely when the host is more communicative.

a mere
33%

had all they needed & more from 1-2 comms

Where's the feel-good factor sweet spot?



Guests contacted 3-5 times feel the most looked after

Ultimately, we all want to understand whether guests feel like they're getting memorable hospitality, or simply "nice enough."

We asked: "How well looked after, if at all, did the communication from your host — or lack thereof — make you feel?"

The greatest satisfaction is amongst those contacted 3-5 times. No more, no less.

The marked increase in satisfaction between 1-2 and 3-5 points of contact reinforces how **a small operational shift can make a meaningful difference to your guests.**

Note that there is no increase in guest satisfaction levels if hosts communicate more than 3-5 times, in fact it drops off.

Takeaway: enough with the mediocrity! Communicate effectively a handful of times for optimum guest satisfaction.

60% felt very well looked after from 3-5 comms

The benefits of information

Let's look at how the information guests receive translates into actual benefits to their travel experience, including activities/extras they enjoyed thanks to their host. Plus, the bottom benefits these can generate for hosts.

We asked: "Thinking about how useful the communication was with the host... Which, if any, of the following were you able to do as a result of the information provided?" They were invited to select all answers that applied to them.



Nearly two thirds (63%) of US adults who have ever stayed in a short term / vacation rental and have received information from the host took none of the listed actions or can't recall doing any of these things.

They could not be receiving that type of information. Or the way it's provided isn't persuasive enough to sway them to change their travel plans because of it.

Lack of impact or lasting impression strikes again.

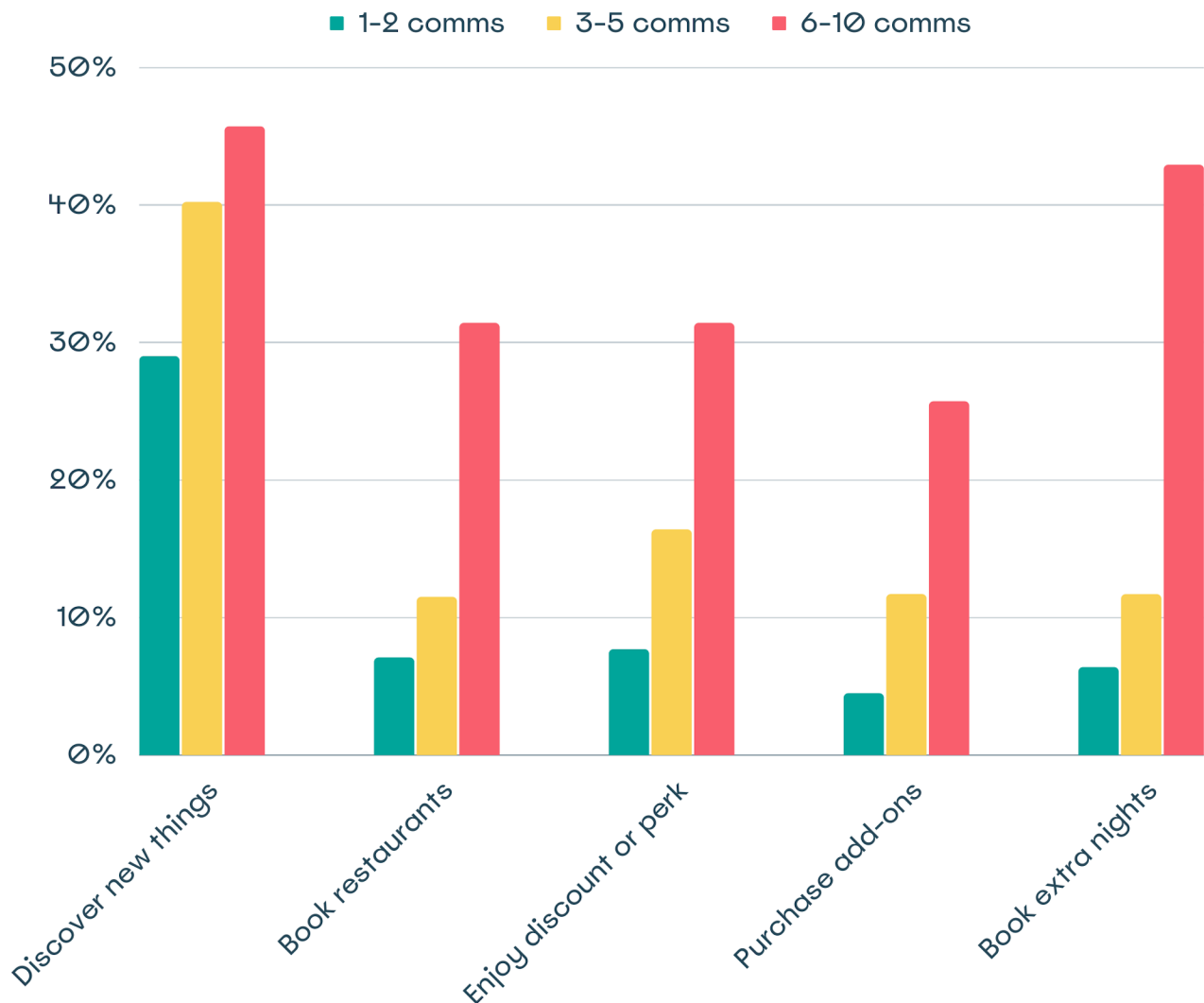
However, there's a **much clearer correlation between operators who communicate more and having guests who experience more** during their stay.

Specifically, 46 per cent of those contacted 6-10 times said they were able to discover new things to see, do, experience in destination.

Forty three per cent of the same group also booked extra nights while more than a quarter (26%) purchased add-ons.

More contact = greater likelihood to purchase more

And looking closely at that sweet spot group who were contacted 3-5 times, 40 per cent experienced more things, and nearly a quarter (23%) purchased add-ons and/or extra nights, respectively.



Are you leaving incremental revenue on the table? Remembering how we concluded the previous section, when there are multiple things to see, do, experience, it can be super simple to break those down into multiple reasons to make contact with your guests (and generate additional profit). We'll leave that one with you...

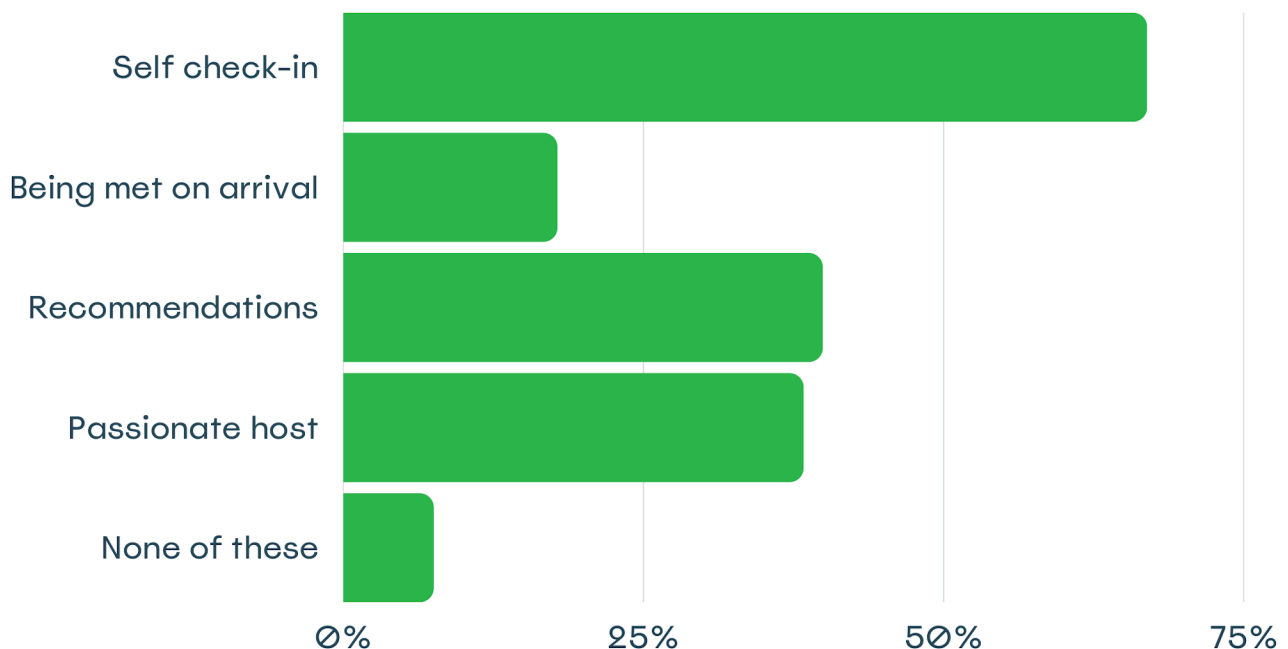
23%

contacted 3-5 times bought
add-ons or extra nights

What influences guest satisfaction

Now let's examine which aspects of guest + operator interactions contribute to a guest's perception of their trip as easy and enjoyable. This includes data on the burning vacation rental question of our time: do guests find it easier/better to self check-in, or to be greeted on-site by their hosts? Let's find out...

We asked: "Which, if any, of the following factors make staying in a short-term/vacation rental easy and enjoyable for you?" (Travellers could select more than one.)



With two-thirds (67%) responding that self check-in contributed to the ease and enjoyment of renting, the message is clear: leave guests to get on with their vacation!

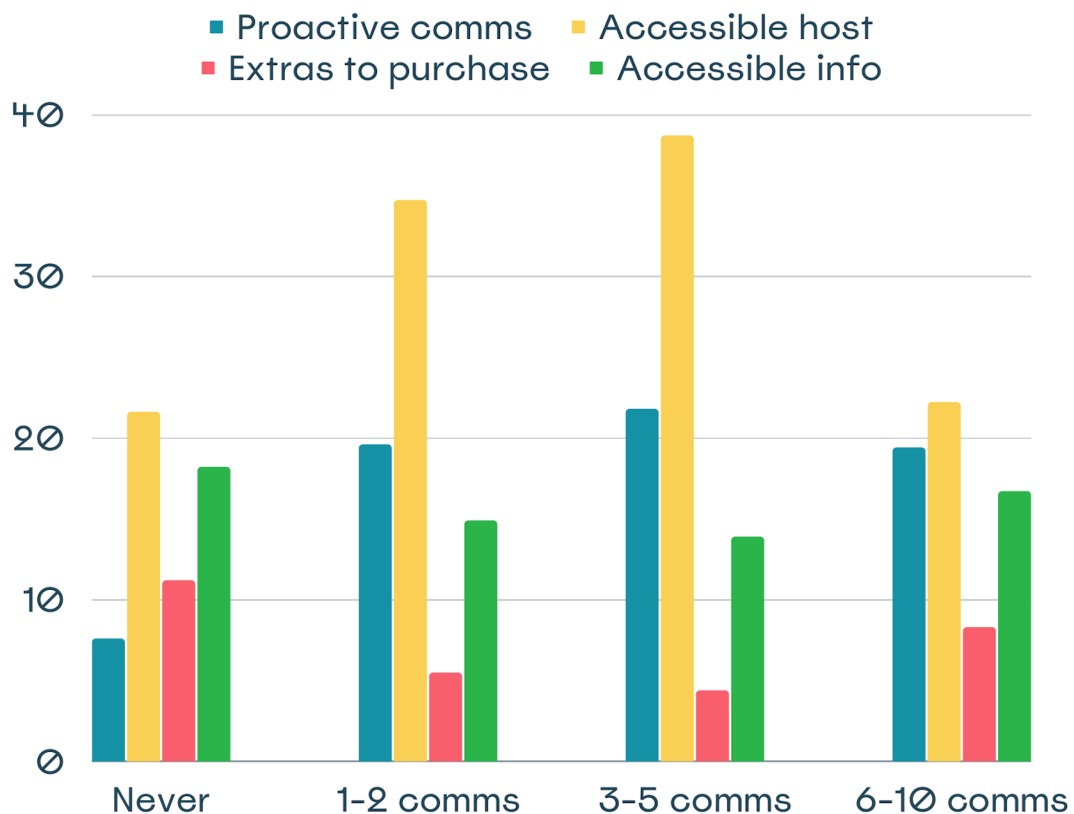
67%

say self check-in makes
their stay easy & enjoyable

Beyond check-in, guests are hungry for interaction:

- 40 per cent of guests hail recommendations from their host as contributing to a positive vacation experience.
- 38 per cent place the responsibility for enjoyment on booking with someone who knows and loves the property/area.

The chart below breaks down the themes influencing guest satisfaction by how many contacts the guest received.



Of the guests who never heard from their host, more than a tenth (11%) stated that the ability to purchase extras most influences the ease and enjoyment of their stay.

What now? Finding ways to imbue your passion, share your recommendations, and demonstrate your deep knowledge as a host/manager (and as a local), while at the same time finding valuable reasons to make additional contact with guests.

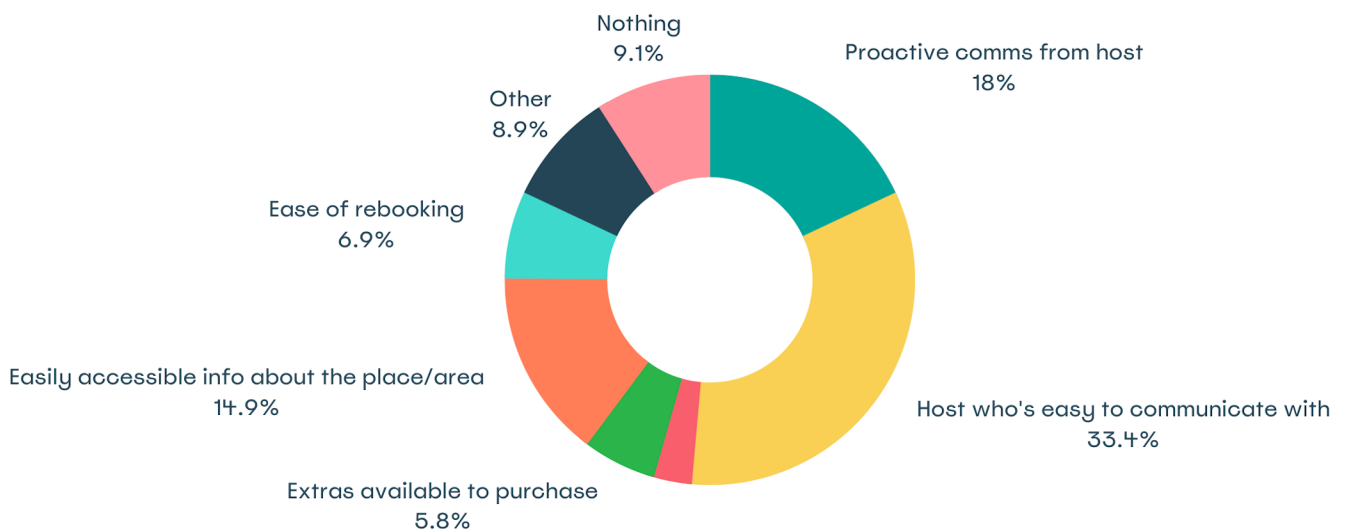
Remember: a lack of response from guests doesn't necessarily mean a lack of engagement. If you track the metrics — like extra nights sold, digital guidebook open rates or add-on booking value — the data may show that they are paying attention, even if they don't reply.

What influences positive reviews

Let's take a look at the data for the all-important guest review—the true test of whether a stay was successful.

Particularly, we wanted to know how communication between guest and host affected the likelihood that the guest would leave a positive review.

We asked: “Which ONE, if any, of the following MOST influences your likelihood to leave a positive review?” (Travellers were guided to choose the most relevant one.)



When it comes to leaving positive reviews, communication makes a difference. Seven in ten guests (69%) cite communication-related aspects of their stay (proactive and/or accessible host, travel inspiration/ideas and accessible info) as the most likely influence on their inclination to leave a positive review.

69%

say communication influences likelihood to leave positive review

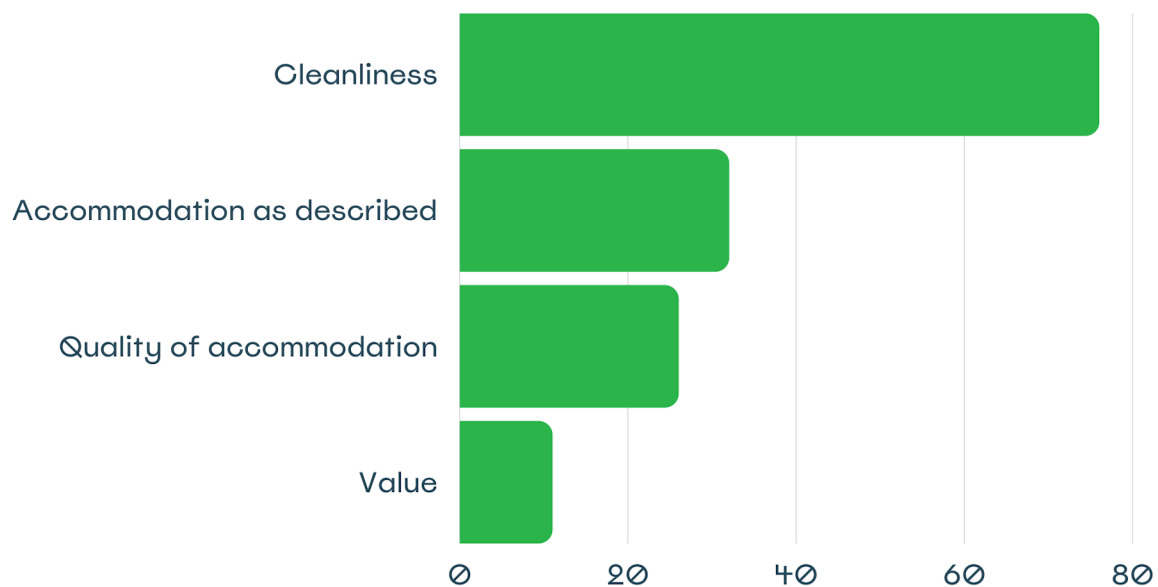
A third of guests simply appreciated knowing that their host was available if they needed them, and an additional 18% liked it when their host reached out proactively during the stay. **“Communication and information is expected as a bare minimum,”** said one respondent.

One way to let guests know that you’re available if they need you? By being communicative in the phase between booking and arrival.

Reflecting on responses to the question about when guests want to receive various types of information, there was no determinable trend. **In fact, there was significant indecision about how frequently they want to hear from operators and about what.**

Almost as if, as we pointed to earlier, they are unaware of what’s possible for them to achieve a truly memorable and exceptional guest experience. Therein lies an opportunity for operators: to set an expectation that you care, and will be available to ensure a seamless stay.

We cannot leave this question without addressing the 181 “Other” responses (that’s a hearty nine per cent of respondents taking the time to share what matters to them most).



Specific comments around these defining factors included:

- “A clean rental. So many are sub-standard,” said one.
- “Cleanliness, completeness of necessities, extras the host provided above minimum,” responded another.
- One respondent did not mince words on the topic: “Make sure the rental is clean and leave me alone.”

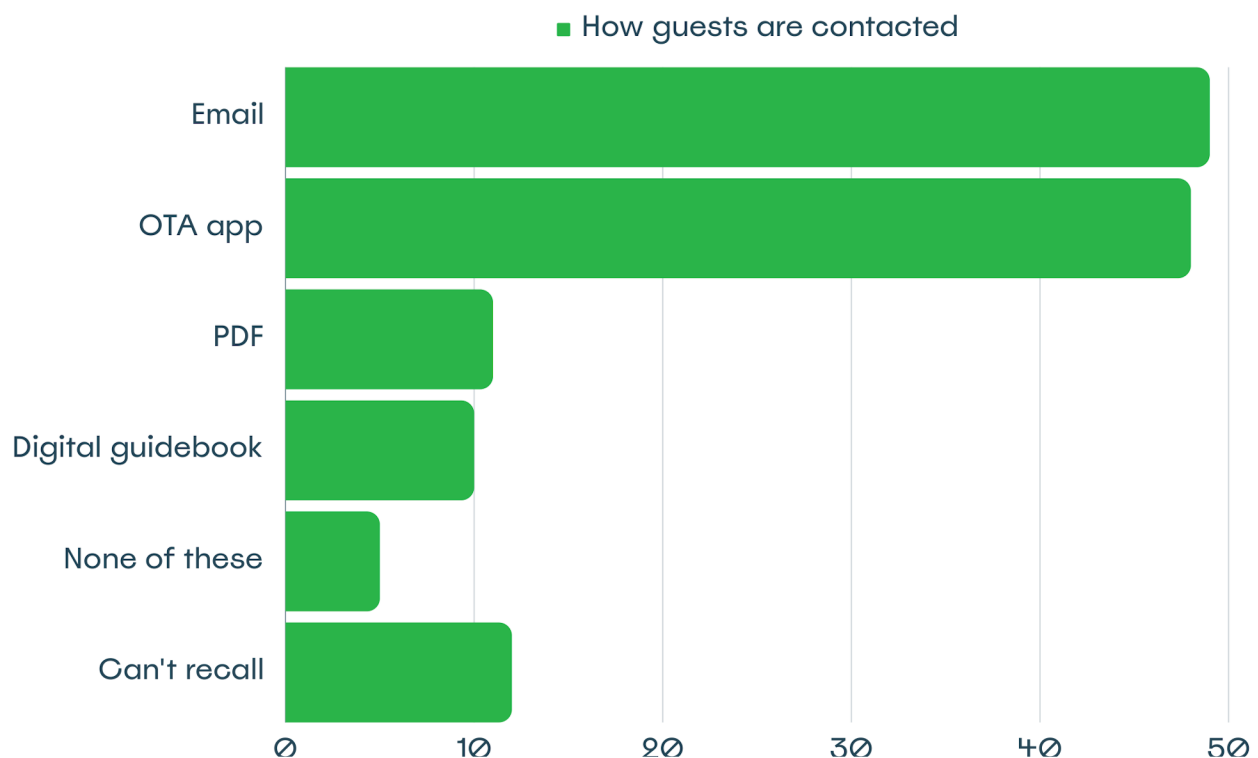
What are guests being sent?

Moving away from quantity and feelings to look more specifically at the type of communications being sent to guests by operators, we found that there is significant reliance on email and on messaging via OTA apps (e.g. Airbnb, Booking, Vrbo, etc.).

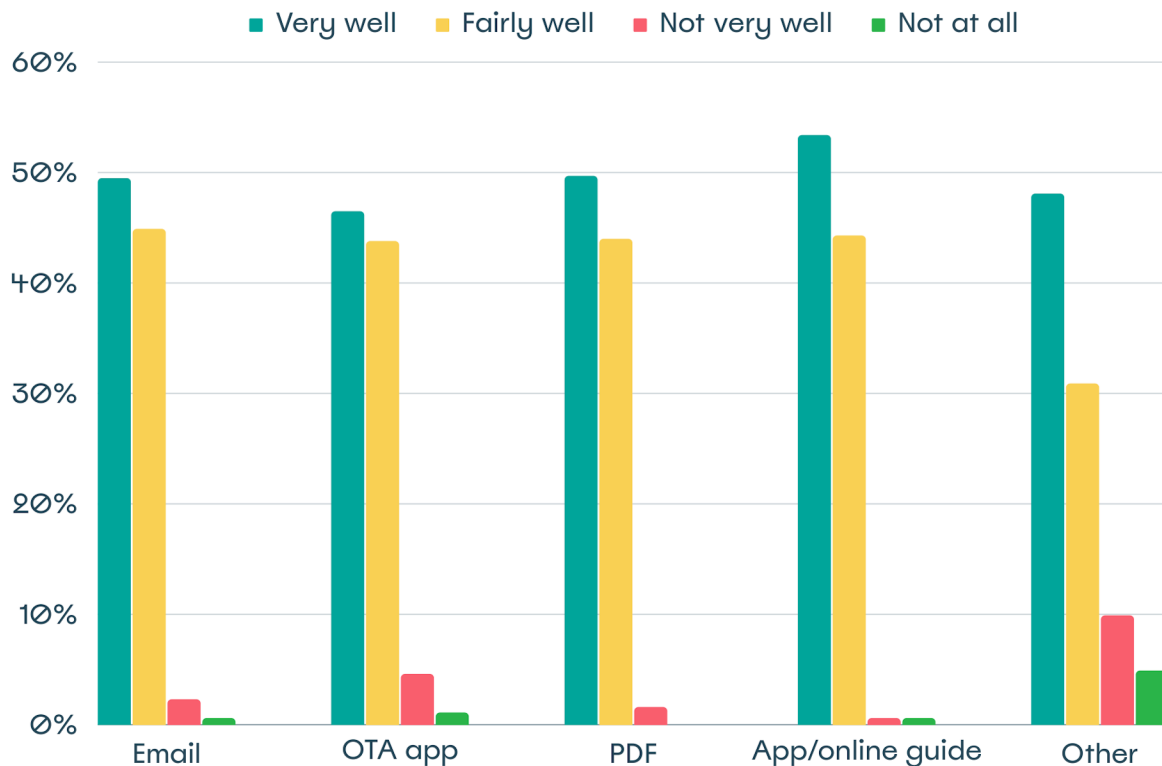
Guests were asked to state all means through which their host provided information. Nearly half (49%) received emails. A similar number (48%) received messages via an OTA app. We have to take into consideration that some of these emails may have been notifications of a new in-app message, but that aside, the go-to for communicating with guests is clear.

We must also consider that those who selected PDF attachment (10%) would most likely have received that via email, as might those sent a link to an app or online guide (10%). And those who couldn't recall (12%) - that's a small yet significant enough number of guests whose hosts left very little impression.

When asked about their preferred means of contact 4 per cent cited other options: SMS text messaging and WhatsApp dominated those responses.



Typically, guests seem content with the lay of the land here, but there are a few outlying exceptions when we slice the data by how well looked after the guest felt. Most notably, **when given an app or online guide, their satisfaction levels increased overall.**



Some of the more enlightening individual responses to this question:

One guest recounted how they helped their host copy and paste information into a Google doc after a PDF failed to send via the Airbnb app.

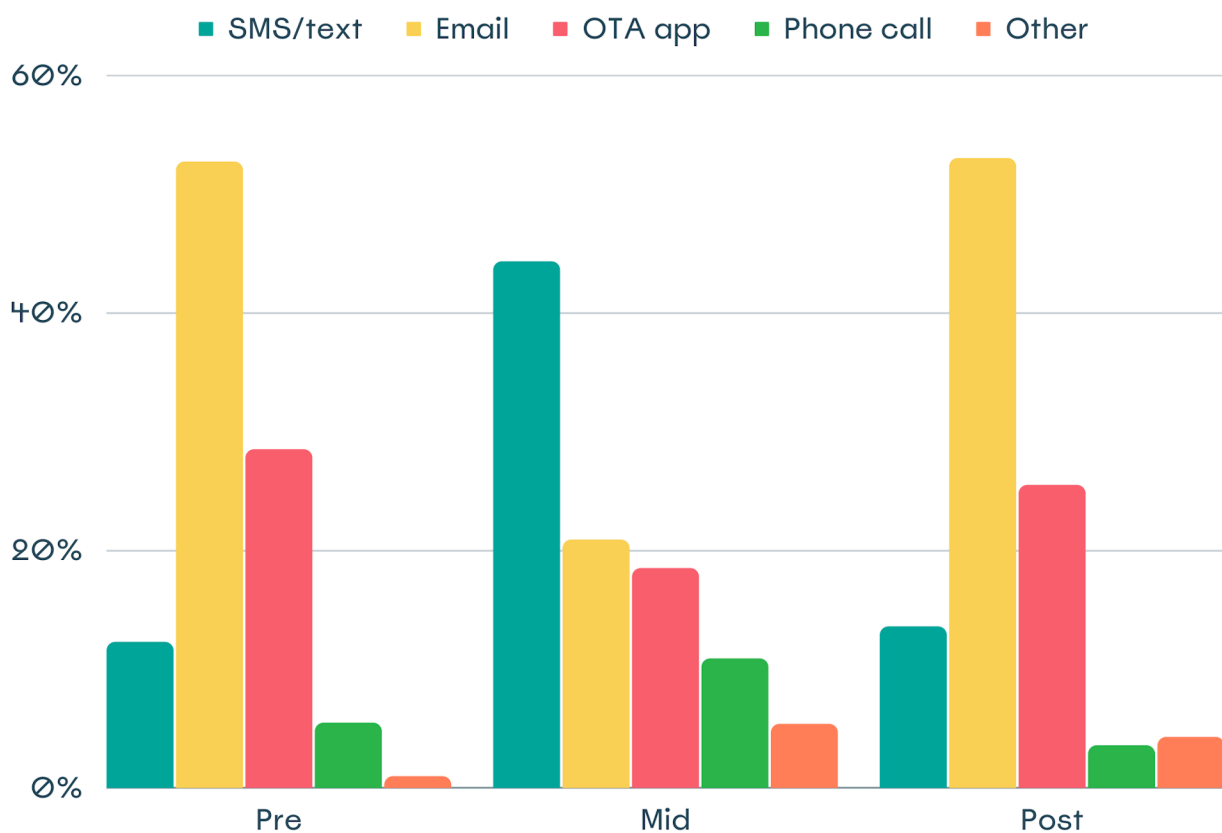
Another appreciated a check-in phone call from their host, who was a hemisphere away.

And, as one 80-year-old respondent put it: “the more information in any form, the better!”

What do guests want to receive?

If operators are looking for peak effectiveness from their communications, we felt it essential to understand the guest perspective on communication format too.

So we asked them: “What is your preferred form of communication when interacting with an owner / host / manager at a short term / vacation rental during each of the following periods related to your stay?” (Those periods were: pre-, mid-, and post-stay.)



Email dominates as the pre-stay communication preference with more than half (53%) of travellers choosing this compared to just over a quarter (29%) wanting comms to come via an OTA’s app.

Interestingly, both of these methods slump in popularity for mid-stay comms - who wants to check their emails on holiday?!

Yet SMS/text has its glory moment in this period with 44% of travellers preferring it over any other method mid-stay.

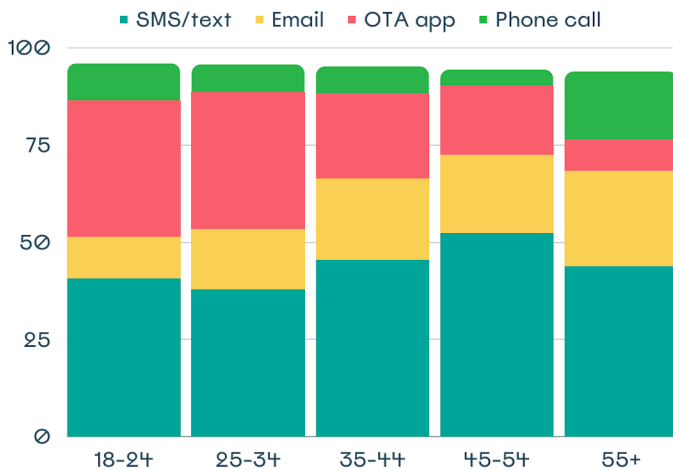
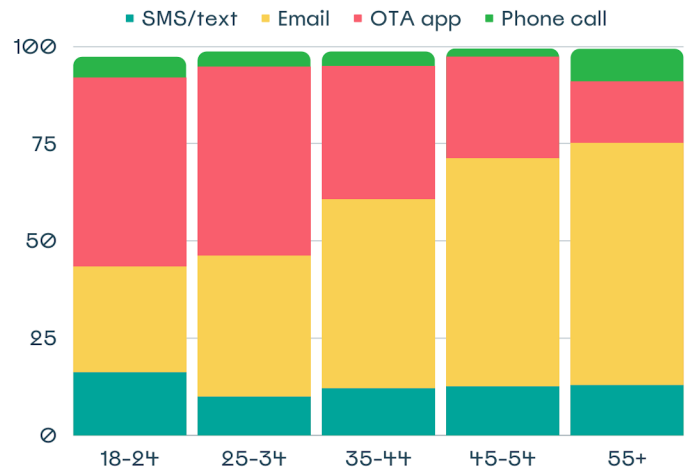
At a time when nobody wants distractions from their holiday, if interruptions must be made, SMS/text enables these to be short and to the point, quick and easy to reference.

Note also the spike in popularity of the phone during this phase, however. At this point it's worth noting how guest preferences differ by age group.

Pre-stay

Spot the shift between the younger groups preferring pre-stay comms via an OTA app and the older groups preferring email. 62% of those 55+ only want email compared to 27% of 18-24 year olds.

Yet it's also the oldest group who are happiest with a phone call (9%), closely followed by the youngest group (5%).



Mid-stay

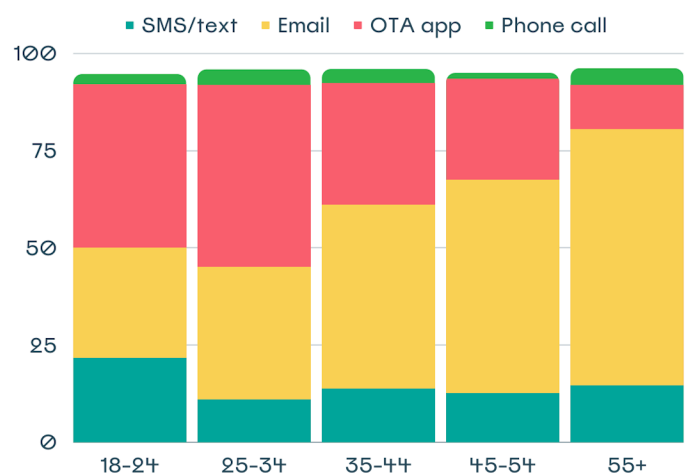
SMS/text reigns supreme for all age groups should hosts want or need to reach guests mid-stay.

But it's also more acceptable for all age groups to receive a phone call during this period especially for the oldest group (18% compared to 9% pre-stay).

Post-stay

Very few want a call or SMS/text. So it's back to inboxes post-stay unless your guests are in the two youngest groups when they'll more happily interact via the OTA (42% and 47% respectively).

For ongoing comms, over a quarter of 18-24 year olds and over a third of 25-34 year olds won't complain at receiving your emails.

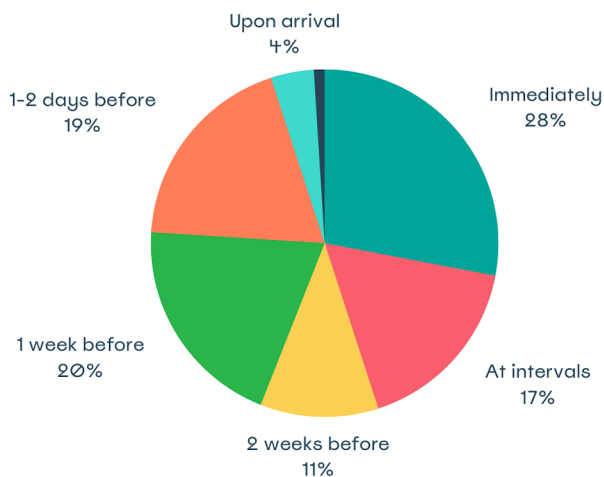


When guests want to hear from hosts

With an insight into how guests want to hear from operators, we delved into when they felt communication from their host was most beneficial for them.

We asked: *“When, if ever, would you prefer to receive each of the following types of information about your accommodation and things to do in the local area you are visiting?”* (They were required to select one timing option per type of information.)

Arrival info e.g. parking, directions, key collection info



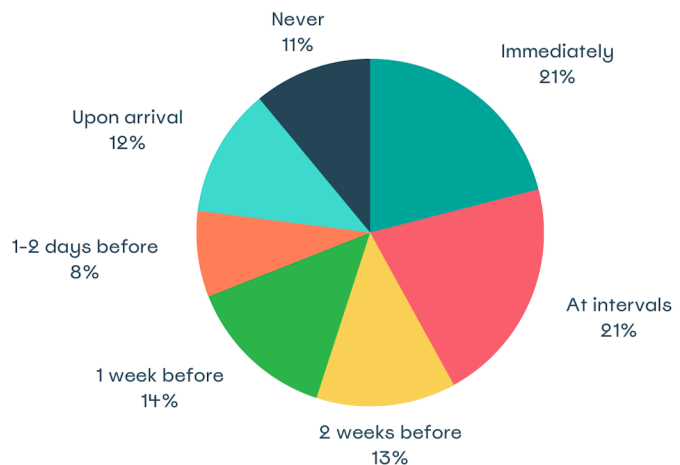
The guest-verse is split on this one, perhaps between those who are uber-organised and want all info upfront, and those who aren't ready for specifics until nearer the time.

If nothing else, this creates an opportunity to share such information more than once (17% want it at timely intervals between booking and arrival).

Restaurants e.g. must-book popular spots

Spot the foodies in the survey respondents! There's a clear preference for sooner rather than later for 42 per cent of respondents who want these recommendations either immediately or drip-fed between booking and arrival.

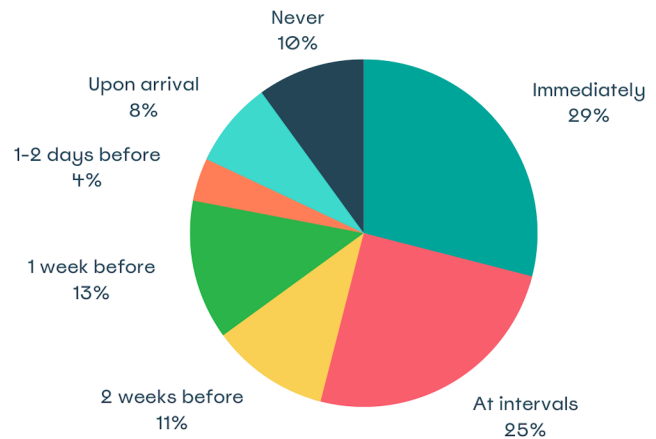
For the 12 per cent who want it on arrival, perhaps tailor the info to no-booking-required suggestions.



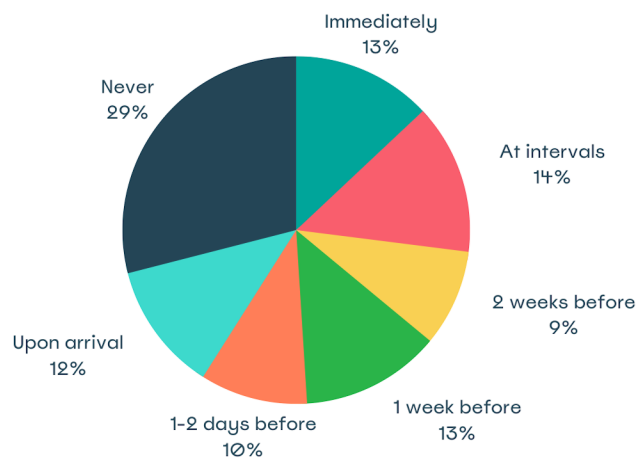
Activites/attractions e.g. must-do or must-book options

There's a similar trend with these kinds of recommendations, although definitely more guests want this info straight away (30%) followed by a quarter (25%) wanting it sent at intervals.

It creates a great excuse to get in touch with guests, showcase the local area and promote upsells.



Grocery delivery e.g. who delivers / what's best bought locally



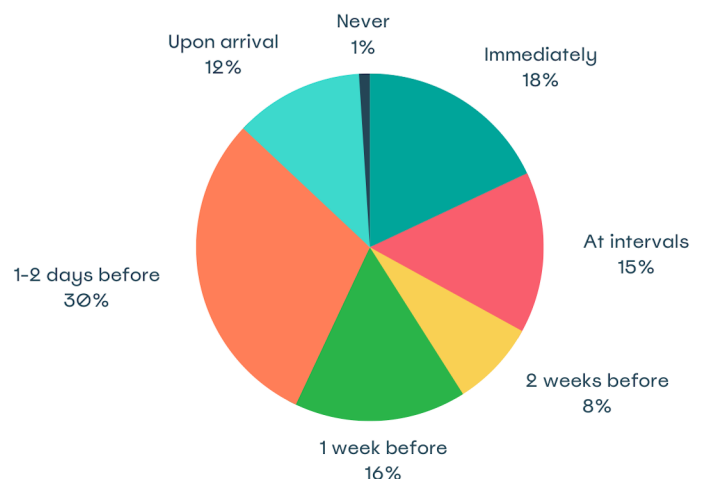
Either the guests surveyed have no plans to cook while on vacation or they're happy to work this one out themselves. That's certainly the case for over a quarter (29%) who don't want to receive this kind of info.

The rest appear indecisive too, although another 27 per cent are happy to receive it early on or between booking and arrival.

Access info e.g. key location/door code, WiFi

There's a significant weighting towards closer to arrival date, with 54 per cent wanting it within 2 weeks of arrival.

Although the organisational skills of those who want it immediately (18%) is admirable, it's perhaps not info that operators want to share so far in advance, unless the booking (and the inclination of these respondents) is to book last minute.



In summary, **guests like to be prepared**, with the majority (~76%) preferring to get property directions and arrival info no later than a week before they get there, and a little more than a quarter seeking that info immediately after booking.

However, guests are **content to wait for nuts-and-bolts access instructions** until the day before or day-of arrival. Perhaps because they don't need a keycode so early in the planning stages — or they worry the message will get lost in their inbox.

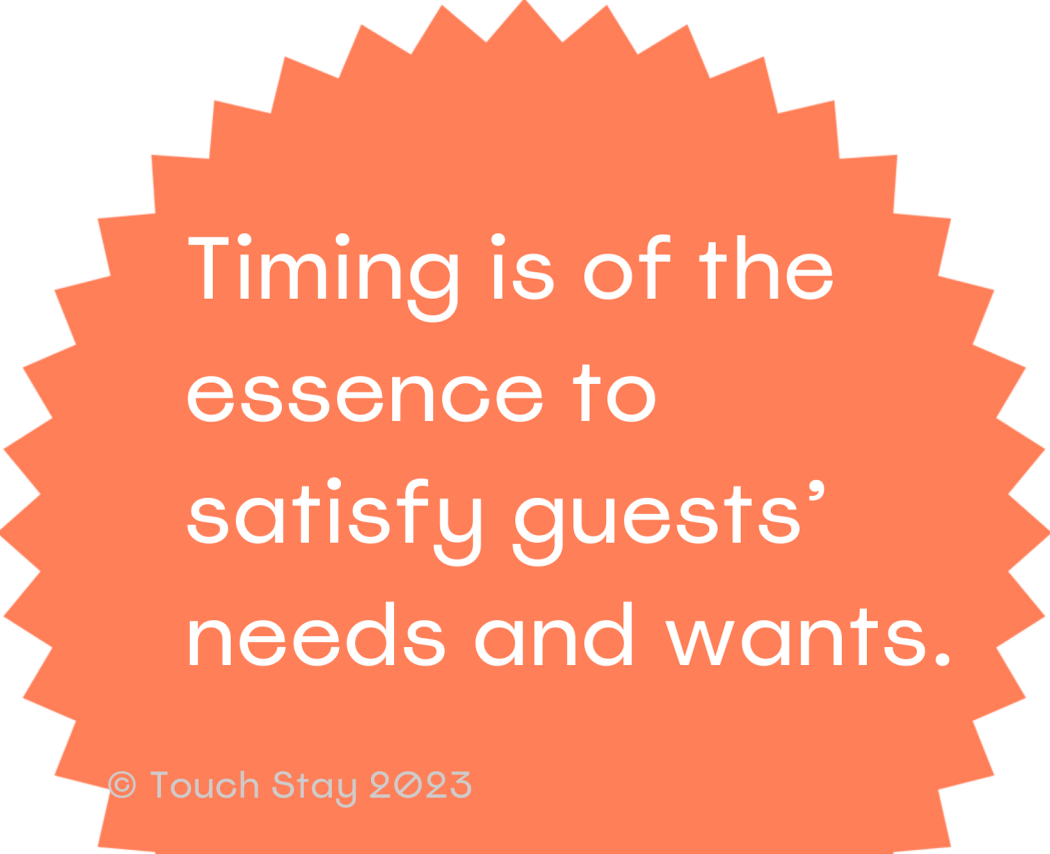
(We're not sure how the 1% who don't want any arrival info plan to get into the property they booked, but we digress.)

When it comes to the fun stuff like restaurant and activity information, again guests show **a preference for timely info**. Share popular attractions and restaurants with guests soon after they book, so they can make their reservations early and rest easy.

Not all guests want all the information all in one go though: more than a fifth requested this type of information at intervals between booking and arrival. This, again, points to the benefit of not dropping all your info into one very long message once or twice and then leaving guests to it.

It may be as simple as sending more short communications rather than fewer TL;DR messages, i.e. send separate messages for activities and attractions, another for restaurants, and perhaps one more for demographic-specific suggestions (e.g. families, couples, solo travellers).

Before you know it, you've found another reason to make contact with your guests... and for them to be more likely to recall your thoughtful hospitality.



Timing is of the
essence to
satisfy guests'
needs and wants.

Turn learnings into leverage

How to sustain your business and expand your bottom line by engaging guests with communications that resonate with their needs, desires and expectations:

Inspire & influence guests' experiences

You don't have to send lots of communications - remember those contacted 3-5 times felt most looked after.

Equally, **you don't have to include every piece of information in every communication** - that'll easily land your efforts in the hard to recall pile.

Recognise that every communication is an opportunity to reinforce your brand and what makes it different from other operators - and that's surely something you want to shout from the rooftops!

Whether it's a one-off text to tell them about a brand new restaurant, two extra emails added to your existing guest communication journey about local attractions, the best family activities, or a cleverly crafted message sent after they've left to help them write a more descriptive review, **communication has the power to both inspire what your guests do while staying at your place and how they talk about it to others afterwards.**

How, what and when you communicate to your guests is entirely in your hands. So showcase the best of what's on offer, remind them of your place's unique selling points before they arrive, **make them feel thought of and as unique as the place they've chosen for their break.**

Stand out for understanding guests' wants & needs

Whether you take this data as the basis for adjusting your guest communication flow, or spend time asking your own guests what, how and when they'd like to hear from you, by balancing their requirements with stand-out communications, you'll achieve memorability.

Just one third of guests surveyed received more than two contacts from their host. It's not hard to stand-out from that!

Consider how frequently you communicate with guests after their booking is confirmed. Acknowledging that some guests could benefit from more frequent communication, consider how to...

- break down guest information into bite-size updates so you're not asking them to digest lots in one go
- delineate practical information from in-destination recommendations so when they look back for something they can find what they need more easily
- don't be afraid to repeat information (remembering guests have more than their holiday plans demanding their attention until they cross the threshold of your place)

Recognise that different people respond better to different methods of communication. If you only ever send emails, try adding in some SMS texts, for example (especially if expanding your guest comms journey to include mid-stay communications).

Similarly consider the format of the information you're sending - especially if it's designed to be a constant reference tool for their stay. Make it easy for them to find this information again and again, rather than having to search for it time after time, which may just result in more inbound questions for you.

Manage your own expectations too - by taking the proactive step of communicating more meaningfully and more usefully with your guests, you'll give them more of what they need, so they'll have less need to ask or to reply.

Measure the success of your expanded communication efforts on the actions your guests take from them (not whether they respond): do they open emails, do they click on links providing more information, do they book extra nights, and so on...

Become memorable and build loyalty

There were clear indicators that some information was desirable immediately after booking and some within two weeks of arrival.

And while there was uncertainty about the specifics of what guests wanted in between, there was appetite for intermittent communication between those two points and inference that not many operators were communicating much in that period at all.

Review the communication you're providing:

- does it direct guests to specific, helpful information in bite-sized chunks...
- or does it info-dump it all into one massive message, requiring work on their part to parse what's relevant and what's necessary now

Be guided by your typical guest profile. Then consider how you can best communicate with them in a way that is:

- timely (right time for them to take action)
- specific (practical need-to-know info)
- inspired (recommendations they don't have to Google or ask for)
- stand-out (unique to you and memorable for them)

A drip-feed of info, staggered between booking and arrival, could help guests to pay better attention, absorb more, ask less. Continuing this approach through and beyond the stay could garner year on year repeats, brand ambassadors, and more...

Take the leap of establishing a considered guest communication journey that resonates with guests. See what results it drives by measuring how many go on to sign up for your newsletter, ask about booking again, enquire about loyalty discounts or perks for referring others.

Whether your booking lead time is 6 weeks, 6 months or more than a year, **you've ample opportunity to make your brand and your differentiation stick in the minds of the lead booker and the rest of their group.**

Grow a sustainably profitable business

Guests who received 6 or more communications discovered more things to see, do and experience, and booked more extra nights than those guests who received less information from their hosts.

Save time and gain resources to apply elsewhere by taking the step to communicate proactively with genuinely useful, timely information to reduce inbound questions. Those communications can also generate incremental revenue and be automated, yet personable, so you can work on your business instead of in it.

Explore adding communications that create reasons to stay an extra night or two...
"This restaurant's only open Wednesday to Saturday and you don't want to miss it!"

Help guests write better quality reviews... *"Hey, thanks again for staying! When you're prompted to write a review, we'd love to know what you thought of the recommendations, the hot tub, the welcome hamper, and how easy it was to reach the beach..."*

Make it easy for guests to book again or recommend your brand to others... *"It's been a joy hosting you, here's a token of our appreciation and a memento for you all to remember your stay."* (Could be branded merchandise, a discount voucher, or something else...)



The opportunity cost of not communicating

When hosts communicate less, and with less thought for the guest:

- there are fewer opportunities to remind guests how much there is to do (reasons to book more nights/stay longer)
- there are fewer opportunities to upsell add-ons or packages

When hosts restrict communications to purely functional information, they limit their opportunities to:

- reinforce their brand voice and values
- demonstrate their passion as a host
- show off their in-depth local area knowledge and how much there is to see/do/experience
- sell extra nights or encourage repeat visits
- build rapport with guests for future advocacy and onward recommendation

All figures, unless otherwise stated are from YouGov PLC. Total sample size was 2024 US adults who have ever stayed in a short term / vacation rental. Fieldwork was undertaken 4-8 August 2023. The survey was carried out online.

About Touch Stay

Touch Stay powers operator-guest communications to free guest experience-obsessed operators to shine in a human and hospitable way, while guests revel in their best stay ever.

Established in 2014, Touch Stay provides a simple tech solution to the administratively heavy task of managing guest information and questions pre-, during, and post-stay.

Touch Stay digital guidebooks deliver an eco-friendly and time-saving alternative to updating in-home paper manuals. Combined with a set of powerful user-requested features, they're loved by users and their guests in equal measure.

Used in 30+ countries around the world, millions of guests now have Touch Stay in their pocket with them on their trip.



Touch Stay