

THE CHECKOUT GAP

A short-term rental has no lobby, no front desk, and increasingly no person. Self check-in removed the one moment when a guest and a host were reliably in the same place, and it took the bag drop with it. What remains are two windows on either side of the stay when a traveler is in the city, in the market, and holding everything they brought.

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FINDINGS

- 01 The gap is built into the platform's own defaults.** When a listing does not specify times, Airbnb applies a 3:00 PM check-in and an 11:00 AM checkout.^{1,2} Those four hours are the floor, not the typical case: real gaps run from the guest's morning arrival to mid-afternoon, and from late-morning checkout to an evening flight.

- 02 Self check-in removed the handoff that used to absorb bags.** Smart locks are now standard operating equipment in competitive markets, and their stated purpose is to eliminate a moment requiring host and guest to be in the same place at the same time.⁹ That moment was also when a bag could be handed over. Nothing replaced it.
- 03 The turnover clock is the binding constraint, and it is tightening.** Hosts describe moving check-in later specifically because same-day turnovers and late departures left no room to clean.⁴ A guest twenty to thirty minutes late can delay cleaners and the next arrival.⁵ Bags left behind extend the same conflict past checkout.
- 04 Hosts face a one-sided incentive.** As one long-tenured guest and host advisor puts it, the host "would lose points for not storing luggage, but would not gain points from the guest for storing it."⁷ Saying yes earns nothing. Saying no can show up in a review.
- 05 A commercial storage network exists, and it runs on staffed shop hours.** Bounce lists more than 20,000 locations in over 4,000 cities.¹⁵ Every one is a business a person walks into, hands bags to a clerk, and returns to within opening hours.¹³ In our six-city sample, coverage ranged from 53 sites down to none at all.

WHAT WE COULD NOT MEASURE

Four things this report wanted and could not obtain. First, the distribution of actual check-in and checkout times across US listings: Airbnb publishes its defaults but not the real spread, and we could not assemble a sample large enough to be worth a number. Second, how often guests ask hosts to hold bags, and how often hosts agree; no platform reports it. Third, what the gap costs a destination in forgone visitor spending, which would require knowing both how many travelers are in it and what they would otherwise buy. Fourth, a complete count of US luggage-storage locations, since the operators publish network totals but not verifiable per-city inventories.

Where a figure below is our own tabulation rather than a published statistic, it is labeled as such. See the methodology note.

I.

Two windows, not one

The problem is usually described as one thing, the afternoon after checkout. It is two, and they behave differently.

The arrival window opens when the traveler lands and closes at check-in. It is bounded on both ends and reasonably predictable, and the traveler usually knows about it in advance. The departure window opens at checkout and closes at a flight, a train, or the drive home. It is longer, its far end is fixed by a carrier rather than negotiable, and it falls at the end of a trip when the traveler is most likely to want to spend money and least likely to want to carry a suitcase while doing it.

Airbnb's published defaults are 3:00 PM check-in and 11:00 AM checkout where a host has not set their own.^{1,2} Operators managing stays daily report 11:00 AM as the most common checkout in practice, with 10:00 AM typical for city apartments and professionally managed listings, and 3:00 PM to 4:00 PM the usual check-in band.^{5,6} Those are the platform's and operators' own descriptions of the norm, not a measured distribution, and we treat them that way.

FIGURE 1

The two windows, drawn from the platform's default times

Illustrative, not measured. Built from Airbnb's stated 3:00 PM and 11:00 AM defaults plus a mid-morning arrival and an early-evening departure. Shaded bands are the hours a traveler is in the city holding their bags.

Arrival day · lands 10:00 AM, check-in 3:00 PM



Departure day · checkout 11:00 AM, flight 6:00 PM



6 AM

10 AM

2 PM

6 PM

10 PM

The two windows land on the same physical property on the same morning. A departing guest wants to leave bags after 11:00 AM. An arriving guest wants to drop bags before 3:00 PM. Between them sits the turnover, which is the only thing in the schedule that cannot move.

II.

What the property cannot absorb

The obvious answer is for the rental to hold the bags. Industry guidance for hosts treats this as a last resort, and describes why: storing bags inside the unit works only if someone can be there, which for most hosts means arranging their own day around it or asking a partner or flatmate to be home.¹⁰ The alternative, setting aside a garage, annex, or spare room the guest can reach without holding the keys to the home, requires a property that happens to have one.¹⁰

The turnover is what makes the rest impossible. Hosts describe the schedule in unambiguous terms. One writes of moving check-in from 3:00 PM to 4:00 PM after same-day turnarounds and guests who did not leave on time left no room to change, clean, and sanitize the space.⁴ Operational guidance puts the same point more bluntly: a guest staying even twenty to thirty minutes past checkout can delay cleaners and affect the next guest's arrival.⁵ A 10:00 AM checkout exists in dense city markets specifically so cleaners have enough time before same-day arrivals.⁵

Bags in a cleaned unit are not a neutral object in that sequence. They occupy the room during the window, and they create a second appointment: someone has to be there when the guest returns for them, or the guest has to be readmitted to a property that has already been reset and, in many cases, had its access code rotated. Smart locks generate codes that activate at check-in and expire at checkout without host intervention.⁹ Letting a departed guest back in means overriding the system that was installed to make access automatic.

Key handoffs are described in the trade as one of the most operationally fragile moments in hosting, precisely because they require host and guest to be available at the same place and time. Self check-in was built to remove that requirement.

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The industry solved synchronous access for the door and left it unsolved for everything the guest is carrying. Airbnb reports that listings with connected smart locks average a 4.95 check-in rating, and the feature is marketed on removing coordination entirely.⁸ A property manager running dozens of units gets that benefit at scale, and inherits the bag problem at the same scale, without a front desk anywhere in the portfolio.

III.

The asymmetry hosts are left with

Because no infrastructure handles it, the request arrives as a message. Every bag-storage ask is a one-to-one negotiation between a guest and a host, conducted in a chat thread, resolved case by case, with no default answer and no policy the platform enforces.

The economics of answering are lopsided. A host who has spent more than a thousand nights as a guest and now advises hosts describes it plainly: the host loses points for refusing and gains none for agreeing.⁷ Hosting guidance that recommends offering storage frames it around reviews and differentiation rather than revenue, and advises hosts who do offer it to write a policy covering hours, fees, security, and liability.¹¹ That is a real administrative burden attached to an unpaid favor.

The trade press is direct about the underlying condition. Unlike hotels, short-term rentals usually have no luggage storage option at all, and flight times and rental schedules rarely coordinate.³ That is not a complaint about hosts. It is a description of a category that grew to national scale without ever building the one piece of infrastructure that the thing it replaced had by default.

IV.

What exists, and where it stops

A commercial answer already exists and is used heavily. Bounce, Radical Storage, Stasher, LuggageHero, Vertoe and others contract with cafés, shops, hostels and hotels to hold bags for a flat daily rate. Bounce lists more than 20,000 locations across over 4,000 cities;¹⁵ Radical Storage lists more than 13,000 spots in over 2,000 cities.¹⁴ US rates in our sample ran from roughly \$2.25 to \$4.95 per bag per 24 hours before fees.¹⁷ ¹⁹ This report is not arguing those services do not work. Their reviews are full of travelers describing exactly the two windows above and being glad the option existed.

The limitation is structural and the operators describe it themselves. The model is a staffed handover: a traveler arrives during the location's opening hours, a person checks the booking, tags the bags, puts them in a back room, and hands them over on return within those same hours.¹³ Everything depends on a shop being open and a clerk being present at both ends. That is a person's shift, not a schedule the traveler controls.

WHAT THE REVIEWS SAY ABOUT STAFFED HOURS

On Bounce's own Savannah page, one traveler reports arriving to drop bags and finding the store closed, opening fifty minutes behind its posted time and twenty minutes after their reservation began. Another records being told at the counter that pick-up closed at 5:00 despite a booking that said 5:30.¹⁵ On the Nashville page, a reviewer notes the shop did not open until 11:00 when the app said 10:30.¹⁶

These are individual reviews on the operator's own marketing pages, not a systematic audit. They are included because they illustrate the failure mode the model implies: when the exchange point is a person, the exchange runs on that person's hours.

Two further limits follow from the same design. Pricing is per bag per day, so a family of four storing bags on both the arrival and departure day of a trip pays eight bag-days for a service that occupies a few square feet. And the service is sold to the traveler, which means the host who fielded the original message is not part of the transaction and gets no operational relief from it beyond having somewhere to point.

V.

Coverage outside the dense core

Network totals in the tens of thousands describe global reach, not local availability. We looked at six US destinations with meaningful short-term rental activity and recorded what the largest US-facing operator publishes for each.

FIGURE 2 • RELAI TABULATION

Published luggage-storage coverage in six US destinations

Location counts and starting prices as published by Bounce on its own city pages, accessed October 2026. One operator only. Non-random sample. Sources 15 to 20.

DESTINATION	PUBLISHED SITES	ADVERTISED FROM
New Orleans, LA	53	\$2.25 per bag / day
Nashville, TN	38	\$2.25 per bag / day
Charleston, SC	21	\$2.75 per bag / day
Savannah, GA	14	\$3.95 per bag / day
Pittsburgh, PA	14	\$3.95 per bag / day
Asheville, NC	None published	No network

CITIES WITH
FEWER THAN 25
PUBLISHED SITES

4 of 6

CITIES WITH NO
PUBLISHED NETWORK
AT ALL

1 of 6

SITES OPEN WITHOUT
A STAFF MEMBER
PRESENT

0

Asheville has no Bounce city page and does not appear in the operator's published list of US markets, which runs from Atlanta to Washington, D.C. and includes none of the small high-tourism towns in this sample except Savannah.²⁰ Los Angeles and Chicago were in the intended sample; we could not retrieve verifiable per-city counts for either, so they are excluded rather than estimated.

The pattern is the one the business model predicts. Coverage follows dense, walkable tourist cores where enough shops are willing to take bags and enough travelers pass by to make each shop's participation worthwhile. New Orleans and Nashville clear fifty and forty sites. Savannah and Pittsburgh sit at fourteen. Asheville, a small city that draws several million visitors a year, has no published network at all. Airports do not fill the gap either: New Orleans's airport does not offer luggage storage, which the operator attributes to security regulations,¹⁷ and New York's stations and airports have no public lockers.¹²

VI.

What asynchronous access changes

Every constraint in this report traces to the same root as the one in Report 01: the drop-off and the pick-up are the same event, requiring two parties in one place at one time. Here the two parties are a traveler and whoever is holding the bags, whether that is a host, a cleaner, or a clerk behind a counter.

Separate the two halves and the constraints fall away individually. A guest leaving at 7:00 AM for a red-eye return can deposit bags before any shop opens. A guest landing at 11:00 PM can retrieve them. The host never enters the transaction, so the message thread does not happen and the turnover is not extended. The cleaner arrives to an empty unit. And the site can be chosen for where guests already walk rather than for which businesses agreed to keep a back room free.

Asynchronous handoff does not cover everything. Oversized items, sports equipment and anything that will not fit a compartment still need a staffed alternative, and a network is only useful where it is dense enough to be within a short walk of where people are staying. Building that density is the actual work, and it is why coverage, not concept, is the honest measure of whether this problem gets solved.

ABOUT THE PUBLISHER

Relai builds hyperlocal infrastructure for asynchronous access. Its Exchange Zones are secure, modular, climate-resilient access points deployed in everyday places, each divided into compartments that one person can leave an item in and another can retrieve later, without the two of them meeting and without staff on site.

This report was produced by Relai because the problem it describes is the one the company was built to address. Readers should weigh it accordingly. The evidence, sources and gaps are laid out above so the argument can be checked rather than taken on trust.

Businesses near where visitors stay: cafés, visitor centers, transit stations, hotels and inns, and property managers' own buildings all sit where the gap happens. Becoming an EZ Host puts an access point on your footprint without putting a task on your staff. Write to hello@relai.us.

Tourism boards and destination organizations: the hours in Figure 1 are hours visitors are in your city and constrained in how they can spend them. If you are looking at that window as an economic question, we would like to compare notes at the same address.

METHODOLOGY

Figure 1, the two windows. Illustrative rather than measured. The check-in and checkout ends are Airbnb's published defaults; the arrival and departure ends are plausible times chosen to show the shape of the window, not averages. It is drawn to make the structure legible, and no quantitative claim rests on it.

Figure 2, the coverage sample. Six destinations were selected purposively for a mix of large tourism markets and small high-tourism towns, and coded from one operator's published city pages in October 2026. Counts are what the operator advertises, which may include locations that are inactive and excludes competitors' sites, so the true number of storage options in each city is higher than shown. The figure measures published coverage by the largest US-facing network, not total market capacity. Los Angeles and Chicago were dropped for lack of a verifiable count rather than estimated.

Listing times. We report Airbnb's published defaults and the norms described by operators and host communities, labeled separately. We did not assemble a listing sample of our own; a small hand-collected set would not have supported a distribution, and none is claimed.

Source handling. Claims sourced to companies with a commercial interest in the result, including storage operators, hosting-software vendors and the platforms themselves, are labeled at the point of use. Customer reviews are treated as illustration, never as measurement. Where a claim is our inference rather than a documented finding, the text says so.

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All sources accessed October 2026. Relai Research 02. Published by Relai Group, Inc., Pittsburgh, PA. Questions and corrections: hello@relai.us