



STRA -
Short Term
Rentals Asia

THE ART OF DATA IN ASIA

Full Year 2024 – STR-specific market estimates (USD)

Destination	Occ %	ADR	LOS	Av. Value
Thailand	71%	\$230	5.0	\$1,150
Indonesia	50%	\$270	5.5	\$1,485
Vietnam	67%	\$170	4.0	\$680
Philippines	61%	\$140	4.5	\$630
Malaysia	65%	\$150	3.5	\$525
Japan	80%	\$200	3.8	\$760
India	64%	\$120	4.5	\$540

Full Year 2025 – STR-specific market estimates (USD)

Destination	Occ %	ADR	LOS	Av. Value
Thailand	74%	\$248	5.3	\$1,314
Indonesia	50%	\$292	6.0	\$1,752
Vietnam	69%	\$185	4.3	\$796
Philippines	63%	\$152	4.7	\$714
Malaysia	67%	\$165	3.7	\$611
Japan	83%	\$218	4.0	\$872
India	66%	\$132	4.8	\$634

Full Years 2024 & 2025 STR-specific market insights (Published March 2026)

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STRA Market Intelligence Anchors

Metric	Value
STRA Operators Mapped	7,000+
Professionally Managed Units	126,000
Top 300 Operators	~45,000 units
Typical STR Stay	4–6 nights

Regional Insights

Indonesia and Thailand deliver the region's strongest booking values, driven by premium villa markets and longer leisure stays. Japan maintains the highest occupancy levels in Asia, supported by strong inbound tourism demand. India continues to grow steadily with longer domestic stays, while Vietnam and the Philippines remain stable mid-market STR destinations. Malaysia remains primarily urban-focused with shorter stays but consistent occupancy recovery.

Regional Takeaway

Asia's short-term rental sector operates on dynamics very different from hotel-centric APAC averages. Longer stays, higher per-booking values and mixed domestic and international booking windows define the STR opportunity. STRA's operator mapping highlights the rapid professionalisation of the sector across Asia.

Data Source

STRA Verified Property Manager Index and operator mapping across Asia. The current dataset tracks 7,000+ professional operators representing approximately 126,000 professionally managed units, with the top 300 operators accounting for roughly 45,000 units.

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