STRA – Short Term Rentals Asia

THE ART OF DATA IN ASIA

Full Year 2024 & YTD 2025 STR-specific market insights (with Japan & India)

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

Destination	Occ %	ADR (USD)	LOS (nights)	Avg Stay Value (USD)
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

2024 Insights:
Indonesia and Thailand deliver the region’s highest stay values, both exceeding USD 1,100 per booking. Japan shows the strongest occupancy levels (~80%) with shorter LOS, while India builds value through longer domestic stays despite lower ADRs. Vietnam and the Philippines balance mid-market ADRs with solid LOS performance, and Malaysia remains urban-focused with shorter stays.

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YTD 2025 (Jan–Aug) – STR-specific market estimates (USD)

Destination	Occ %	ADR (USD)	LOS (nights)	Avg Stay Value (USD)
Thailand	73%	$242	5.2	$1,258
Indonesia	49%	$284	5.8	$1,647
Vietnam	68%	$179	4.2	$752
Philippines	62%	$147	4.6	$676
Malaysia	66%	$158	3.6	$569
Japan	82%	$210	3.9	$819
India	65%	$126	4.6	$580

2025 YTD Insights:
Indonesia continues to lead in average stay value (~USD 1,650) driven by Bali’s premium STR segment. Thailand extends its LOS advantage to 5.2 nights, pushing stay values above USD 1,250. Japan maintains the highest occupancy in Asia (82%), while India grows steadily with rising ADRs and long family stays. Vietnam and the Philippines remain stable mid-market performers, and Malaysia continues its steady recovery with shorter urban stays.

Takeaway: Asia’s STR markets cannot be viewed through APAC hotel averages. Operators must plan for both *domestic short booking windows (7–15 days)* and *international long-haul windows (60–100 days)*. Longer stays and higher per-booking values define the region’s STR opportunity, making Asia-first insights essential for sponsors and partners.