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Defining the Future of Short-Term Rentals in Asia

A Regional Trust & Standards Framework Emerging from Leadership Dialogue

An Outcome Paper from the recent *Gather · Connect · Grow* Leadership Summit

Short-Term Rentals (STR) across Asia have entered a decisive phase of growth. What began as a fragmented, platform-led expansion of alternative accommodation has matured into a significant accommodation category influencing tourism flows, real estate investment, and local economies. Yet despite scale, regulatory clarity and professional alignment remain uneven across markets.

The recent *Gather · Connect · Grow* Leadership Summit brought together professional property managers, platform representatives, legal advisors, and regional stakeholders to examine a central question:

How can Asia move from fragmented growth to structured credibility?



This paper outlines the consensus direction emerging from those discussions and the establishment of a neutral, not-for-profit regional trust and standards layer to support sustainable STR growth.

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The Current Landscape: Growth Without Uniform Structure

Across Asia, STR growth is outpacing regulatory harmonisation. Governments are responding with state-by-state or city-level frameworks. Platforms are seeking compliant supply. Investors are increasingly evaluating STR as a formal asset class.

However, the absence of consistent professional benchmarks has created uneven market maturity. Professional Property Management Companies (PMCs) coexist alongside informal operators, often without clear distinction in public perception.

The result is regulatory uncertainty, reputational risk, and constrained institutional capital participation.

Why Asia Requires a Regional Layer



National/local associations and local tourism bodies play essential roles. Yet Asia's STR market is inherently cross-border in investment flows, technology adoption, and platform integration.

A regional framework does not replace national initiatives. It strengthens them by:

- Providing neutral coordination across markets
- Supporting consistent professional standards
- Aggregating verified operator data
- Offering a structured counterpart for regional policy dialogue
- Enhancing investor confidence through transparency

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The STRA Framework: Five Pillars

- Verified Property Manager Index – Distinguishing structured professional operators from informal listings.
- Accreditation Framework – Establishing operational benchmarks and governance standards.
- Art of Data – Ground-up intelligence supporting evidence-based regulatory engagement.
- Knowledge Hub – Consolidated regional research and policy documentation.
- Leadership Convening – Curated working summits aligning operators, platforms, and policymakers.

Together, these pillars form a structured trust architecture designed to elevate credibility across the region.



Implications for Platforms and Tourism Authorities

For global platforms such as Airbnb, Expedia Group, and Agoda, structured operator alignment reduces regulatory risk and enhances long-term supply stability.

For tourism boards and policymakers, a regional trust layer enables constructive engagement based on verified data rather than anecdotal claims.

For institutional investors, professional benchmarks support clearer underwriting assumptions.

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9-12 Month Regional Roadmap

- Phase 1: Listening and operator validation across priority markets
- Phase 2: Formalisation of accreditation and governance benchmarks
- Phase 3: Structured regional policy roundtables
- Phase 4: Leadership summits in key Asian capitals
- Phase 5: Publication of regional data benchmarks

Asia's STR sector does not require louder promotion. It requires stronger structure. Governance precedes growth credibility. Standards precede scale.



The leadership consensus is clear: the next phase of STR maturity in Asia must be built on transparency, verified operators, and collaborative engagement between platforms, regulators, and professional managers.

A neutral, not-for-profit regional trust framework offers a credible pathway forward.

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