

U.S. STR Pulse

Monthly short-term rental insights across the U.S.

Sept, 2025

Regional Overview

Last 30 days versus same period last year

	Occupancy %	ADR	Booking Window	LOS
Midwest	31% ^{-6%}	\$224 ^{-3%}	48d ^{-2%}	3.7d ^{+2%}
New England	27% ^{+1%}	\$288 ^{+3%}	63d ^{-1%}	3.4d ^{-4%}
Southwest	28% ^{-4%}	\$194 ^{-6%}	35d ^{-5%}	4.0d ^{+4%}
Western U.S.	31% ^{-8%}	\$277 ^{+1%}	49d ^{-6%}	6.7d ^{-2%}
Hawaiian Islands	33% ^{-2%}	\$298 ^{+1%}	84d ^{-1%}	6.7d ^{+0%}
Mid-Atlantic	29% ^{-6%}	\$242 ^{-1%}	58d ^{-5%}	3.8d ^{+0%}
Rocky Mountain	26% ^{-3%}	\$261 ^{+0%}	63d ^{+3%}	3.3d ^{+1%}

Regional Spotlight

Last 30 days versus same period last year

Southeast

31% ^{-6%}	\$240 ^{-3%}	\$74 ^{-9%}
Occupancy %	ADR	RevPAR
69d ^{-5%}	4.9 ^{-1%}	\$1,164 ^{-5%}
Booking Window	LOS	Avg. Stay Value

The Southeast U.S. experienced dips in both Occupancy and Average Daily Rate in September, creating a 9% drop in year-over-year RevPAR.

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The forward-looking information is extremely helpful for us to be more efficient with our marketing dollars. It helps us see when our down periods will be and how far out people are booking from different feeder markets.

– Beth Gendler, Gulf Shores & Orange Beach Tourism

