

# Lifestyle hotels in Asia Pacific

How will the lifestyle hotel revolution shape  
hospitality in the region?



**Research**  
Asia Pacific  
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[jll.com](https://jll.com)



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# Introduction

## 2008 sparked Asia Pacific's lifestyle hotel boom

Lifestyle hotels are transforming hospitality by emphasizing vibrant public spaces over traditional rooms, where travellers and locals connect through distinctive experiences. As our [Global Hotel Investment Outlook 2025 report](#) highlights, this sector has become entrenched in modern hospitality, offering opportunities for brands and investors, as highlighted with the recent acquisitions of Standard International by Hyatt and of CitizenM by Marriott International.

In Asia Pacific, the lifestyle hotel trend gained momentum in 2008, marking a pivotal year with more new lifestyle brands entering the market than in the previous twenty years combined. In 2008 alone, brands like W Hotels and Aloft inaugurated and expanded their first properties in the region, establishing the foundation for what has evolved into a major hospitality industry movement. Lifestyle hotels continued to flourish in Asia Pacific through both global chain expansion and distinctive boutique platforms.

How will the lifestyle hotel revolution shape hospitality in the region in the years to come?





# Key findings

1

**Four times** more lifestyle hotel rooms in 2024 than in 2014, with lifestyle supply anticipated **to grow 34% by 2027**

3

Lifestyle hotels concentrated in **upscale and above segments**, yet upper midscale and below show promising growth

5

Lifestyle hotels in APAC achieve a **10-11% Price Premium**, however with nuances

2

**Southeast Asia counts three times more lifestyle hotel rooms than Australia New-Zealand and South Asia;** 'Down Under' displaying the strongest growth

4

**Ten new lifestyle brands** anticipated to enter Asia Pacific **by 2027**, with international lifestyle brands representing **more than 80%** of the lifestyle supply (in no. of rooms)

6

Lifestyle hotels registering **30% higher F&B (including MICE) revenue per occupied room** on average compared to traditional hotels



# Appeal of Lifestyle\*

1

Lifestyle and boutique hotels are defined by their unique, exclusive environment versus the standardized experience of traditional hotels. Where boutique hotels are independent locales or family-run chains, lifestyle hotels are operated by established hoteliers that offer added customer value in loyalty programs across their portfolios.

3

Many landmark eateries, bars and cafes help drive higher ADRs and form a significant revenue stream, drawing locals and hotel patrons.

5

Lifestyle hotels are appreciating in value faster than non-lifestyle hotels. The average price per key for lifestyle hotels experienced a 3.2% CAGR over the last ten years globally, 120 basis points premium to non-lifestyle hotels in the same segment.

2

Meticulous design combined with a thoughtful guest experience, shifting the focus from the in-room experience to creative front-of-house spaces that encourage socialization.

4

Reprioritizing how capital is spent to create memorable stays can lead to consumer preference as well as highly efficient operations and strong cash flows.

6

Lifestyle hotels are expected to continue demonstrating strong investment appeal, with major growth expected in popular urban and resort locations, as well as emerging market destinations such as China, India and the Middle East.

\* Extract from: [‘An investor’s guide to lifestyle hotels’](#), JLL 2023



# 01

## State of Play in Asia Pacific



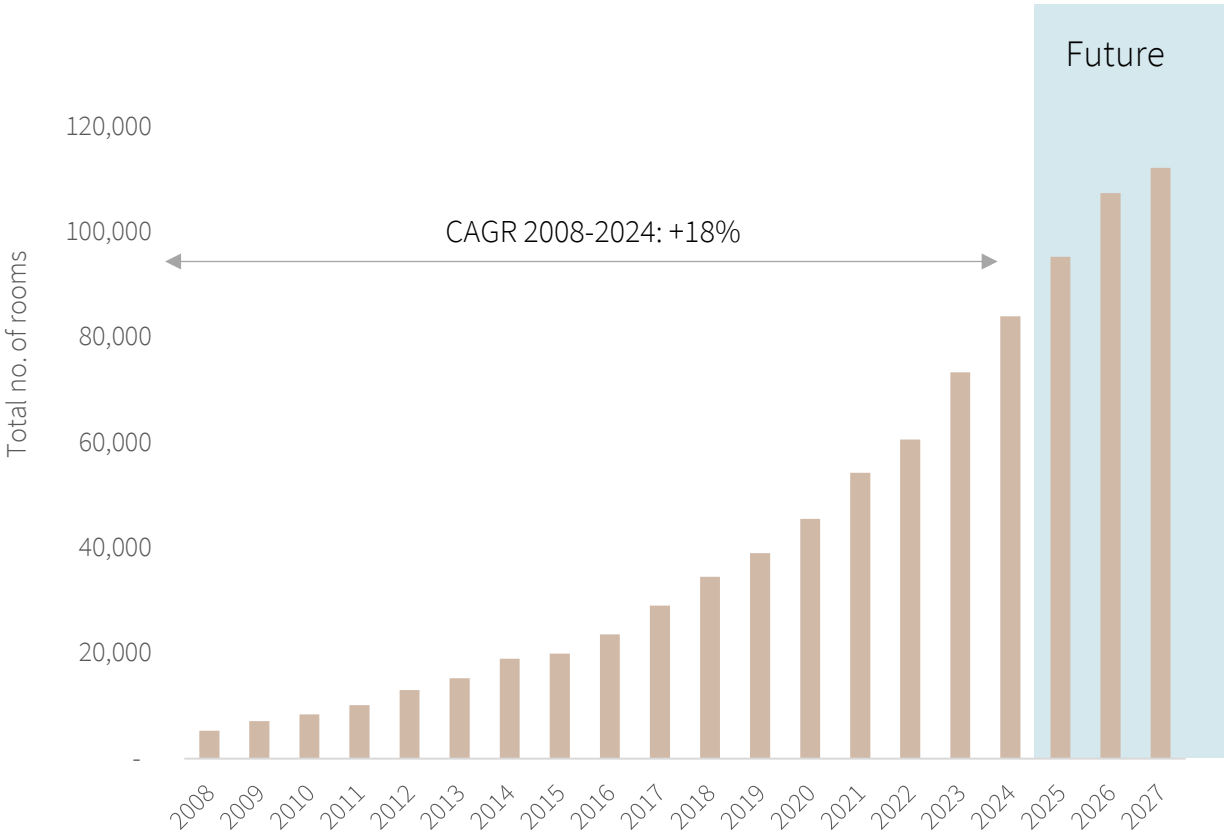


Four times more lifestyle hotel rooms in 2024 than in 2014, with lifestyle supply anticipated to grow by 34% by 2027

Asia Pacific has witnessed remarkable growth in lifestyle hotel supply over the past two decades. This expansion accelerated notably from 2014, marking the beginning of an unprecedented expansion period. Since this inflection point, nearly 65,000 new lifestyle hotel rooms have been introduced to the Asia Pacific market. The last decade has been particularly transformative, with lifestyle hotel inventory quadrupling during this period. This strong growth rate reflects both shifting consumer preferences toward experiential stays and strategic repositioning by hospitality groups and independent operators recognizing the value of lifestyle hotels.

In 2024, lifestyle properties achieved their highest representation among all new hotel openings. The momentum shows no signs of slowing, with lifestyle hotels likely to constitute between 6-9% of all new hotel supply entering the market between 2025 and 2027. This surpasses even the record-breaking levels observed in 2024, underscoring the transition of lifestyle from an emerging trend to an established foundation of Asia Pacific hospitality offering.

Figure no. 1  
Growth in lifestyle hotel supply in Asia Pacific



Source: JLL Research, Industry sources



Southeast Asia counts three times more lifestyle hotel rooms than Australia New-Zealand and South Asia, yet ‘Down Under’ displaying the strongest growth

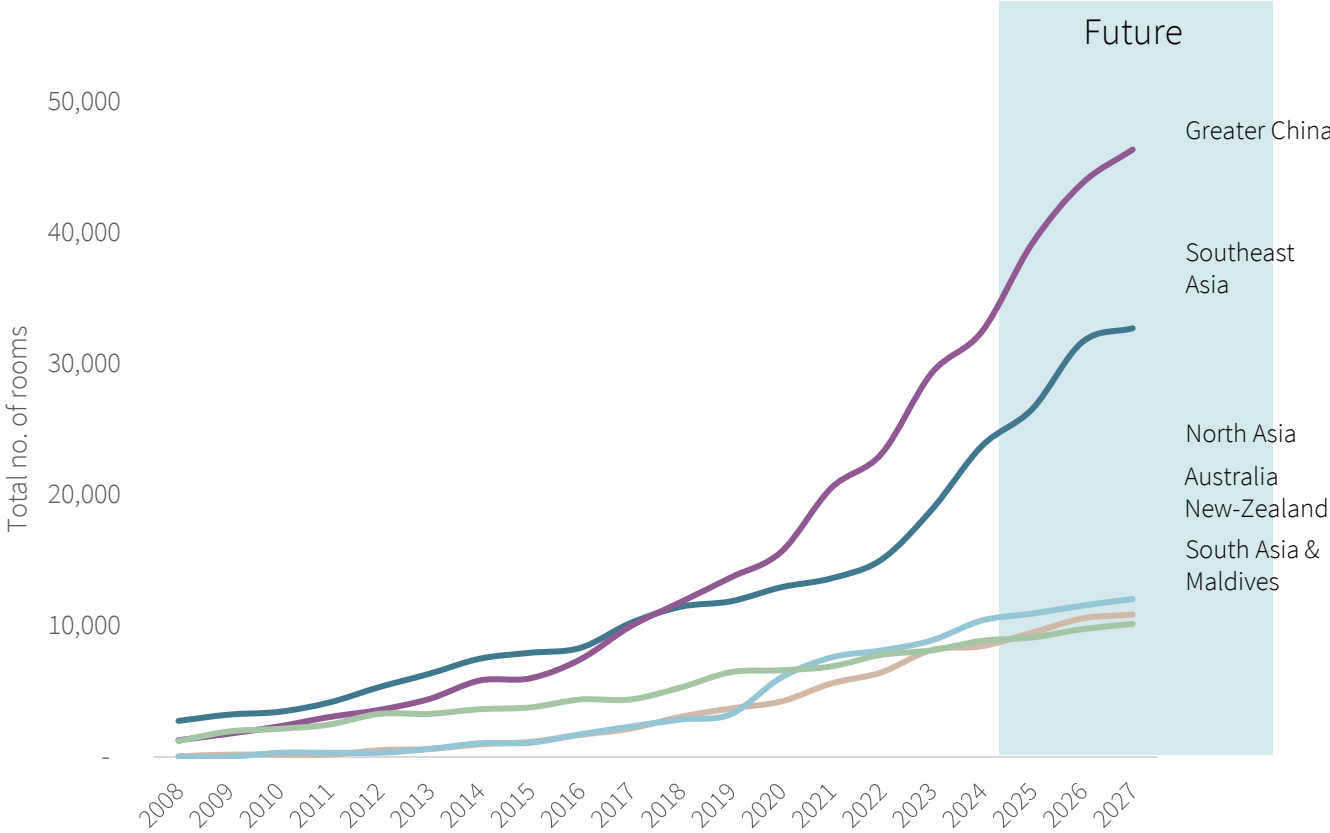
Lifestyle accommodations experienced growth across all subregions over the past ten years.

Despite Greater China outpacing the rest of the region in total number of lifestyle hotel rooms with the proliferation of prominent brands like Indigo, W and aloft, Southeast Asia was the first subregion where lifestyle hotels took off.

Indeed, Southeast Asia saw rapid development in lifestyle hotel offerings, propelled by the introduction and growth of brands such as Aloft, Autograph Collection, Hotel Indigo.

Subregion	CAGR 2008-2024
Greater China (GC)	21%
Southeast Asia (SEA)	14%
North Asia (NA)	26%
Australia New Zealand (ANZ)	34%
South Asia (SA)	12%

Figure no. 2  
Existing lifestyle hotel supply by subregion (in no. of rooms)



Source: JLL Research, Industry sources





Lifestyle hotels concentrated in upscale and above segments, yet upper midscale and below show promising growth

Back in 2008, experiential offerings for hotel guests were primarily found in upscale and above properties, as these were viewed as premium amenities. Not surprisingly, 62% of lifestyle hotel inventory that year was concentrated in the luxury as the first mover segment in lifestyle.

This trend has persisted following the pandemic, with lifestyle brand growth continuing to occur predominantly in the luxury and upper upscale segments. New luxury lifestyle brands entering the APAC market between 2025 and 2027 include: Emblems, The Unbound Collection, Thompson Hotels, Delano.

Gradually, we are observing lifestyle take a firmer hold in the higher volume segments and domestic-focused products in the three-star and entry level four-star categories in Asia Pacific. Many of the trends supporting growth in full service lifestyle hold true in this segment and we expect high growth here, including from best-in-class domestic brands.

Figure no. 3  
Proportion of lifestyle hotel supply by segment – Asia Pacific (% of total rooms)

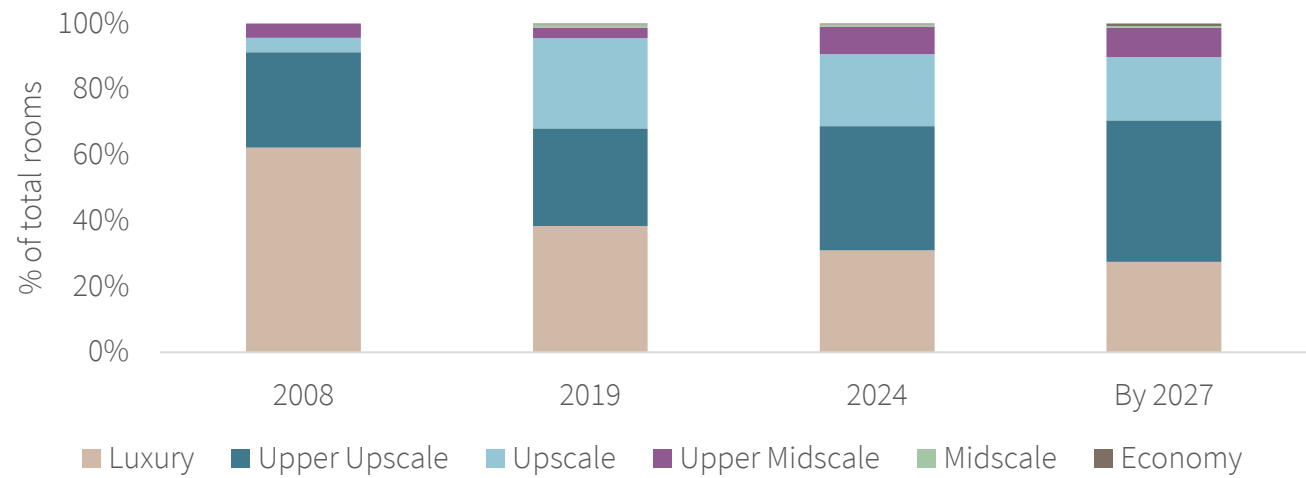


Table no. 1  
Number of new lifestyle brands entering the Asia Pacific market by positioning

Positioning	2008 to 2013	2014 to 2019	2020 to 2024	2025 to 2027
Luxury	4	2	3	5
Upscale & Upper Upscale	8	10	9	4
Upper Midscale & below	1	3	1	1

Source: JLL Research, Industry sources



## Ten new lifestyle brands anticipated to enter Asia Pacific by 2027

Marriott International leads the Asia Pacific region with eleven lifestyle brands, representing 44% of the total existing lifestyle hotel supply as of 2024. IHG Hotels & Resorts follows in second place with four brands, while Hyatt occupies the third position.

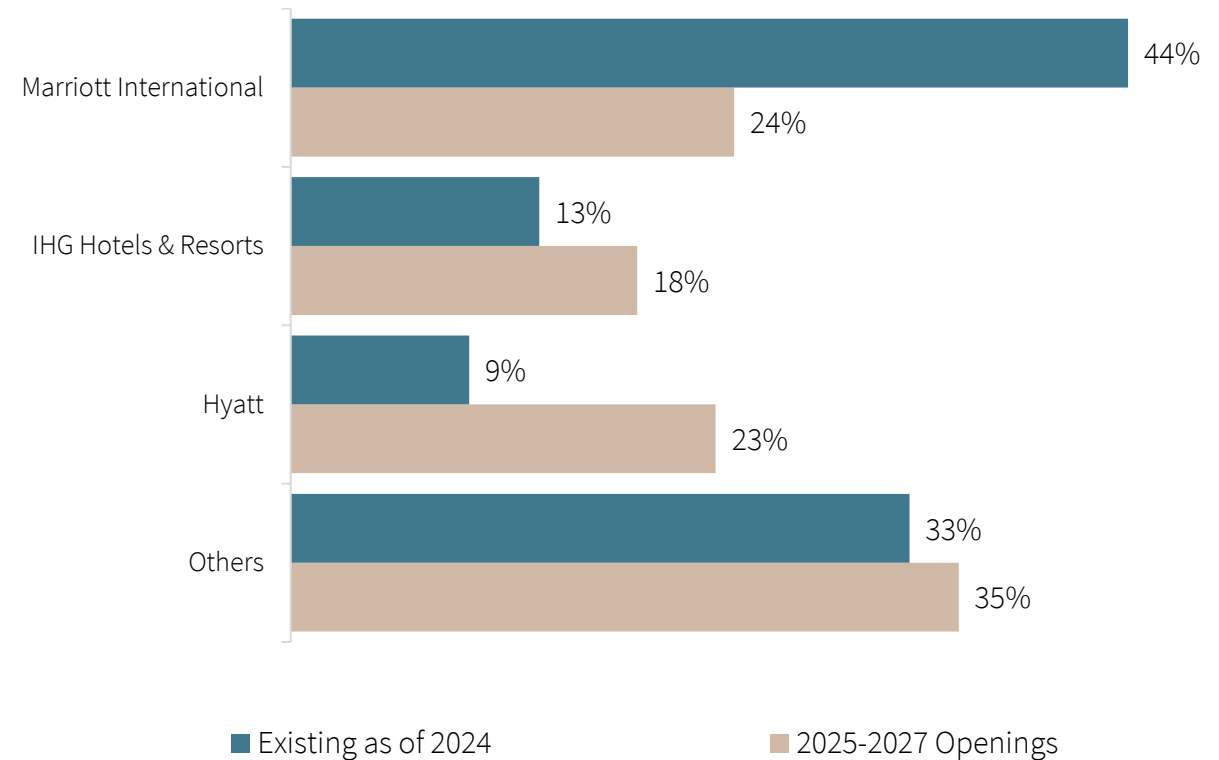
Post-pandemic, lifestyle hotel development has shifted from core urban locations with established brands to conversion projects using soft brands by major hotel groups. These soft brands allow properties to maintain unique identities and offer distinct and differentiated experiences without the need to follow strict brand standards.

Looking ahead to 2027, Marriott International maintains its market leadership, whilst lifestyle hotels under Hyatt brands are anticipated to represent 23% of the total upcoming new lifestyle supply between 2025 and 2027.

Lifestyle brands are anticipated to continue expanding in Asia to support interest from both investors and guests, especially for brands that have been recently acquired by international hotel chains, such as NoMad (Hilton), CitizenM (Marriott), The Standard (Hyatt), Ruby (IHG), and European/US based lifestyle hotel chains.

Figure no. 4

### Top 3 lifestyle hotel groups in Asia Pacific (in no. of rooms)



Note: % represents proportion over total lifestyle hotel rooms

Source: JLL Research, Industry sources



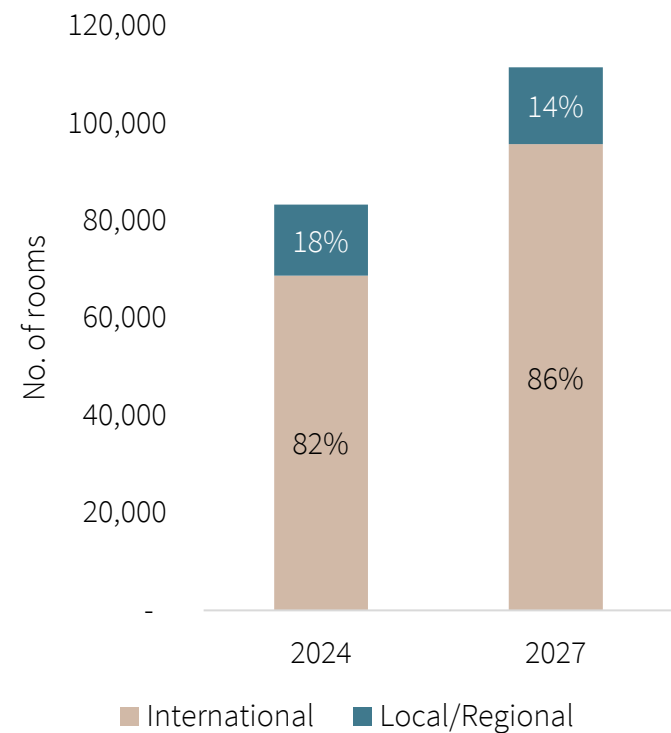
## International lifestyle brands represent more than 80% of the supply, yet strong expansion opportunities for locally-grown lifestyle brands

In Asia Pacific, lifestyle hotel brands owned by global hospitality companies account for most supply, and will likely maintain their dominant position through 2027 with strong expansion. As experiential travel becomes increasingly central to the region's tourism landscape, international hotel groups will find significant opportunities to grow their lifestyle hotel portfolios.

In the meantime, although Local/Regional lifestyle brands currently make up a smaller share of the market (18% of existing and 14% of future supply), these locally-grown brands have significant growth potential by leveraging their deep local connections and story telling potential. This opportunity is evidenced by the expansion of brands like QT, Collection by TFE, Little National, ASAI, Avani, Patina, Janu, Artyzen, Lively Hotels, Lubd, LyLo and many others.

Figure no. 5

### Proportion of Local/Regional lifestyle brands vs. International (in no. of rooms) – Asia Pacific



Select Local/Regional lifestyle brands in Asia Pacific

**ASAI**  
HOTELS

**QT**

**JANU**

**PATINA**  
HOTELS • RESORTS

**LN** LITTLE NATIONAL HOTEL

**AVANI**  
Hotels & Resorts

**ARTYZEN**  
HOTELS AND RESORTS

**lively**  
hotels

**TRUNK**

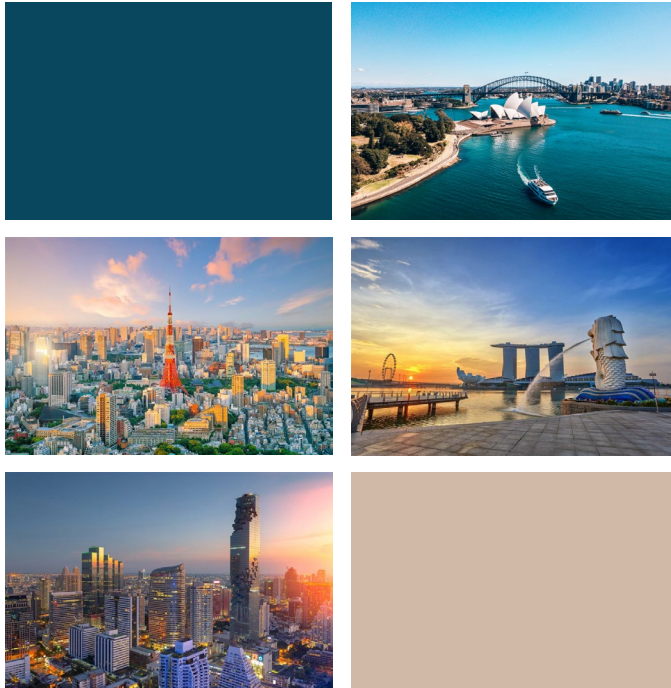
Note: % represents proportion over total lifestyle hotel rooms (excl. independent)

Source: JLL Research, Industry sources





# Countries in focus



## Australia

Lifestyle hotel brands are rapidly expanding in Australia's major cities, with established brands like Hyde entering Melbourne and Perth, while SH Hotels launches 1 Hotel in Melbourne and Treehouse in Adelaide. Established local success stories include The Calile and The Eve.

Sydney's upcoming hotel pipeline is dominated by lifestyle concepts rather than traditional brands, featuring Moxy, Caption by Hyatt, and 25 Hours. Meanwhile, boutique hotels increasingly partner with lifestyle operators to maintain unique character while accessing established platforms, as seen with EVT's Ode hotels and Hotel Woolstore 1888 joining Handwritten Collection.

Franchising remains focused on traditional brands, operators are more open to F&B/wellness partnerships to reduce risk, and lifestyle concepts haven't yet penetrated regional markets.

## Japan

Japan's lifestyle hotel market remains underdeveloped compared to other destinations in the region, offering growth potential in both urban and resort locations. Development is expanding beyond Tokyo, Osaka, and Kyoto into regional cities and resort destinations like Fukuoka, Okinawa, Sapporo, Hakone, Hiroshima, and Nikko.

Whilst international operators expand their presence, domestic companies like TAKE and GIVE NEEDS, and Plan Do See are accelerating their expansion. Concurrently, major developers (Mitsubishi Estate, Mitsui Fudosan, Nomura Real Estate) are launching their own lifestyle brands.

These hotels typically command premium rates through superior locations, enhanced food and beverage offerings, and distinctive designs.



## Singapore

Singapore's lifestyle hotel segment has evolved significantly with an initial focus on luxury offerings. Soaring land prices have squeezed room sizes, steering the market toward upscale lifestyle brands that can deliver premium experiences despite spatial constraints.

Lifestyle hotels' flexibility with brand specifications is expected to be increasingly popular with hotel owners seeking to maximize return on expensive land investments and development costs while still creating distinctive guest experiences and enhanced food and beverage offerings.

Future growth looks promising with the support by Singapore's tourism strategy emphasizing unique experiences and continued urban redevelopment creating opportunities for these adaptable hospitality concepts that balance spatial efficiency with experiential value.



## Thailand

Developers in Thailand are interested in lifestyle hotel concepts for their ability to generate higher daily rates and strengthen competitive positioning in Bangkok's food and beverage market.

These contemporary hotel concepts provide crucial differentiation in markets like Bangkok and Phuket where traditional hotel brands have reached saturation point.

The emergence of third-generation industry stakeholders has catalysed the shift toward trendier hospitality developments.

As lifestyle hotels proliferate in Thailand, their price premium may diminish. Successful properties are likely to increasingly rely on strategic collaborations with local dining establishments, wellness centres, and other experience-focused partners.



# 02

Is Lifestyle  
commanding a  
premium?







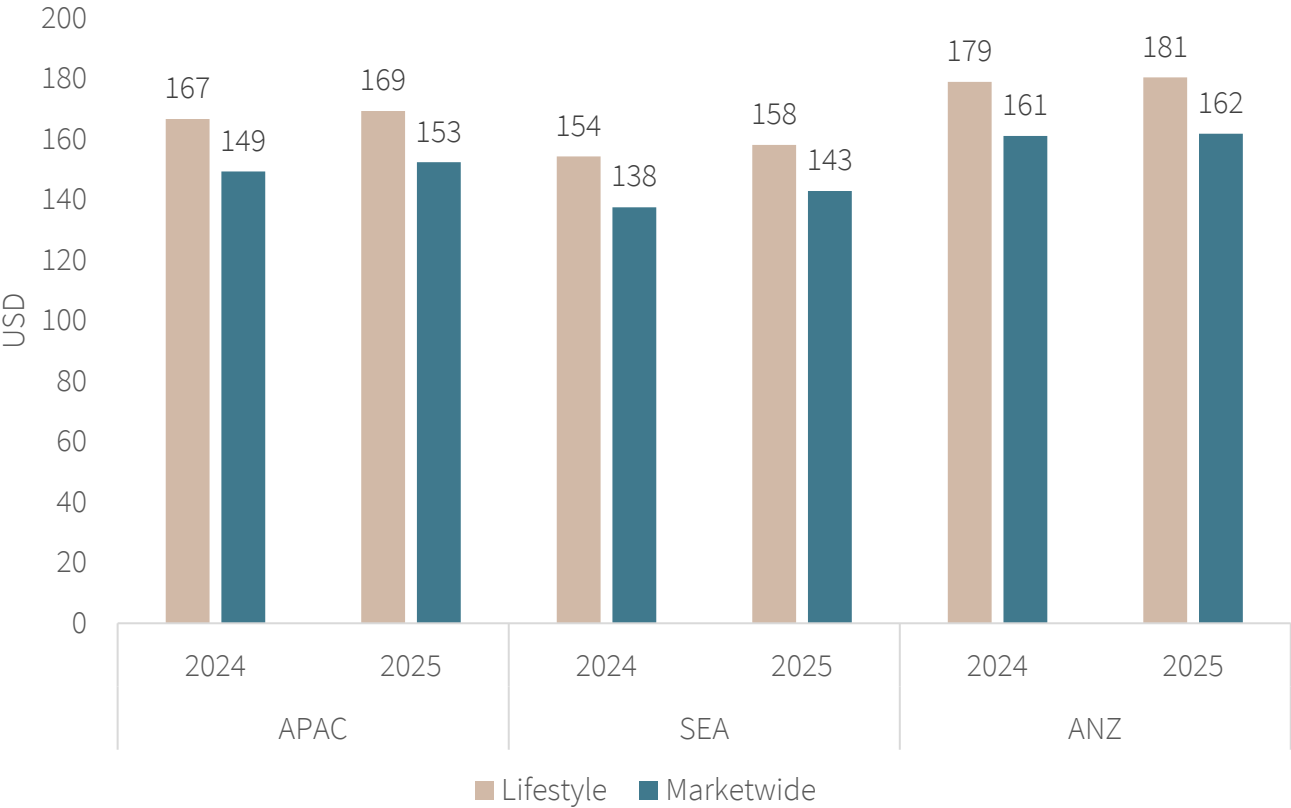
### Lifestyle hotels in APAC command a 10-11% price premium, however with nuances

In Asia Pacific (APAC), lifestyle hotels command a price premium of an Average Daily Rate (ADR) of approximately 10-11% above the overall market average. This premium has remained stable year-on-year, indicating sustained consumer willingness to pay higher rates for lifestyle hotel experiences through market cycles.

The premium is consistent across different APAC subregions, though with some notable geographic variations. Australia and New Zealand (ANZ) demonstrates a slightly higher ADR premium for lifestyle properties compared to Southeast Asian (SEA) markets. At a more granular level, these premiums vary significantly based on location, concept and execution.

Where this price premium is paired with smaller room sizes, returns to investors are further elevated. Beyond this, investment returns can be enhanced through more appealing wellness and dining outlets, as well as associated branded residences or being integration in mixed-use precincts.

Figure no. 6  
**Average Daily Rate**



Note: 12-month rolling data as of April 2025, USD base

Source: HOTSTATS a Duetto company



## Lifestyle hotels registering 30% higher F&B (including MICE) revenue per occupied room on average compared to traditional hotels

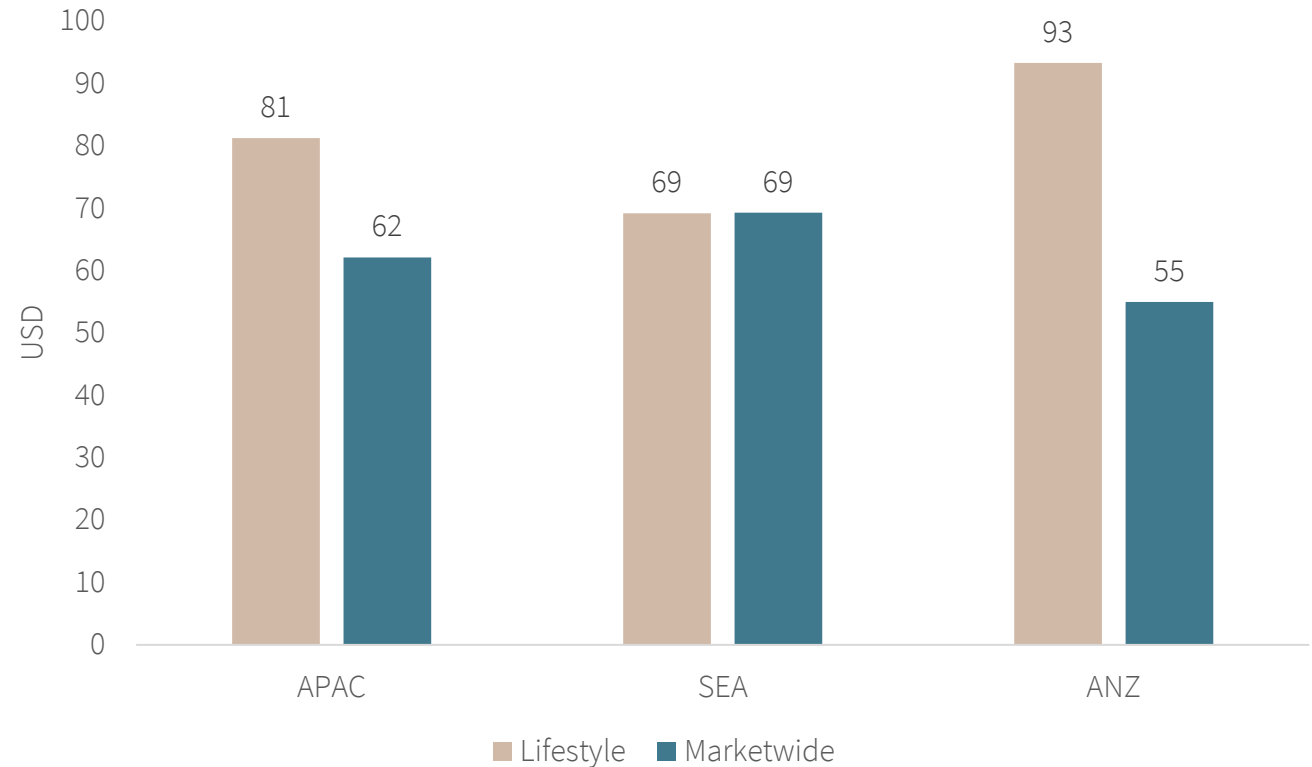
In Asia Pacific, lifestyle hotels see their Food & Beverage (including MICE) recorded approximately 30% higher revenue per occupied room than the broader market average.

Globally lifestyle hotels tend to over-index on dining outlets and bars as part of delivering a more engaging and enhanced stay. This generally holds true in Asia, although the revenue premium may be less pronounced as many hotels (especially in Southeast Asia) have extensive F&B outlets across the board.

In Australia and New Zealand, lifestyle hotels demonstrate substantially higher F&B revenue compared to their overall markets. This success may be attributed to lifestyle brands effectively positioning their properties as destinations, not only retaining hotel guests for dining but also attracting non-resident customers to their food and beverage venues.

Figure no. 7

### F&B Revenue Per Occupied Room



Note: 12-month rolling data as of April 2025, USD base

Source: HOTSTATS a Duetto company





# Conclusion

Lifestyle hotels in Asia Pacific have quickly moved from being an emerging segment to core to every urban and resort market in the region with depth – attracting many savvy investors.

The addition of a further 34% growth in lifestyle supply by 2027 signals a continued upward trend in the segment. We expect growth to gradually shift further into the domestic driven midscale segments, and for the lines between “lifestyle” and “traditional” hotels to continue to blur.

Southeast Asia's leading position, complemented by brand proliferation in Australia, will reshape competitive dynamics across the region. As the sector continues to evolve, the question remains whether pricing premiums will hold – all indications are that it will for now.

Lifestyle hotels concepts, brands and design will continue to flourish, emphasising authenticity, sustainability, and ultra-personalisation — establishing this segment as a fundamental and expanding component of Asia Pacific's hospitality landscape.





# Key trends shaping the lifestyle sector in Asia Pacific

Investment in Lifestyle hotels will still be popular due to efficient programming, flexible operating requirements, differentiation (especially for HNWIs and funds with specific mandates), and premiums.

Blurring lines between lifestyle and legacy brands: legacy brands will likely reposition themselves. Expect core lifestyle brands to offer distinct and differentiated experiences (e.g. wellness, sustainability, fitness)

Look for increasing competition amongst operators in Asia Pacific, as new to market brands from Europe and the Middle-East are eager to enter the Asia Pacific market akin to Starwood Hotels, Sunset Hospitality, Equinox, SIRO (Kerzner).

Expect increased M&A of smaller platforms, with independent brands looking for stronger distribution & operating capabilities, and established hotel chains looking to build scale and concepts quickly and reduce time to market entry.

## Research author

### Marina Bracciani

Vice President Research  
Hotels & Hospitality  
Asia Pacific  
marina.bracciani@jll.com

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## To find out more about JLL services, contact:

### Xander Nijns

Head of Advisory & Asset Management  
Hotels & Hospitality  
Asia Pacific  
xander.nijns@jll.com

### Kai Siang Cho

Head of Operator Selection  
Hotels & Hospitality  
Asia  
kaisiang.cho@jll.com

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HotStats, now a Duetto company, is a global data benchmarking company offering specialized performance analysis and a benchmarking tool that helps analyze financial and operational data from a diverse range of hotels globally. This provides hotel owners, operators, and investors with valuable insights into the financial performance of their properties against their competition – an invaluable resource for weighing options and evaluating investment opportunities. For a quick demo, email us at [Askus@hotstats.com](mailto:Askus@hotstats.com) or visit [www.hotstats.com](https://www.hotstats.com).

Duetto recently welcomed HotStats into its ecosystem as part of a shared vision: to become the Revenue and Profit Operating System for the hotel industry. While the platforms remain distinct today, HotStats becomes a core part of that vision — bringing deep profitability and operational insight to complement Duetto's strengths in pricing and revenue strategy. This collaboration enables hotel owners and operators to better connect forecasting, pricing, and full P&L visibility, supporting a shift from top-line growth to bottom-line impact. Over time, the goal is to deliver a more unified experience that helps teams act faster, uncover hidden profit opportunities, and drive smarter decisions across the business.