

# ROMANIA SHORT-TERM RENTAL MARKET

KEY TAKEAWAYS • 2025 ANALYSIS

# BUCHAREST, NATIONAL MARKET

Romania's largest urban short-term rental market - and accelerating.

# €66.8M

Total short-term rentals revenue in 2025

*+20% year-on-year*

# Market Supply

Supply is growing - but demand is growing faster

# 5,507

Average listings in Bucharest

*+541 units vs. the previous year*

# BUCHAREST KEY METRICS 2025

€56.5

ADR

*Avg. nightly rate*

62%

Occupancy

*One of the highest in analyzed cities*

€1,006

Monthly average

*Revenue per property listed*



# Demand driver

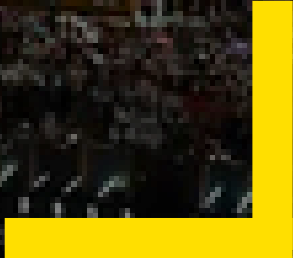
# 2.06M

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Tourists in Bucharest · 2025

*1.1M foreign visitors · +8% YoY*

*Peak month: September*



# Regional Leader: BRAȘOV

# €20.4M

Total short-term rentals revenue in 2025

*1,946 listings · +7% YoY · Year-round tourist destination*

*Highest revenue per property among all regional markets: €10,471*

# Regional Markets: CLUJ-NAPOCA

# €9,910

Avg. annual revenue per property

*Largest regional market by listings (1,306)*

*Untold + Electric Castle: ~800K attendees ·  
July-August peak €1,000/property/month*

# Regional Markets: CONSTANȚA

# 6.5 DAYS

Longest average stay in Romania

*€8,980 annual avg. · €103.8 Aug. ADR*

*· €1,500 Aug. avg. revenue*

*Longer stays offset lower off-season occupancy -  
reliable annual yield*

# Regional Markets: TIMIȘOARA

€8,220

Average annual revenue / property

*837 listings*

*Stable, business-driven demand.  
Diversified throughout the year*

# Regional Markets: IASI

# €7,348

Average annual revenue / property

*563 listings · 47.4% avg. occupancy*

*For premium central units, long-term rental may outperform short-term rental.*

COMING SOON

# Follow us for the release of our hotel market report