Extended Stay Hotel Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Hotels, Accommodation & Resorts (Hospitality & Tourism)
> **Source:** https://www.mordorintelligence.com/industry-reports/extended-stay-hotel-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 59.86 billion
Projected Forecast (2031)	USD 59.86 billion
Growth Rate (CAGR)	10.62 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

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![Major players in Extended Stay Hotel industry](images/chart_2.png)

![Extended Stay Hotel Market (2026 - 2031)](images/chart_3.png)

![Extended Stay Hotel Market: Market Share by By Service Level](images/chart_4.png)

![Extended Stay Hotel Market: Market Share by Booking Channel](images/chart_5.png)

![Extended Stay Hotel Market CAGR (%), Growth Rate by Region](images/chart_6.png)

![Extended Stay Hotel Market](images/chart_7.png)

![Icon](images/chart_8.png)

![footer background image](images/chart_10.png)

![Mordor Intelligence on Facebook](images/chart_12.svg)

![Mordor Intelligence on Pinterest](images/chart_14.svg)

![Mordor Intelligence on Instagram](images/chart_15.svg)

![ESOMAR](images/chart_17.png)

![GPTW](images/chart_19.png)
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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market OverviewStudy Period | 2022 - 2031 |
Market Size (2026) | USD 59.86 Billion |
Market Size (2031) | USD 99.15 Billion |
Growth Rate (2026 - 2031) | 10.62 % |
Fastest Growing Market | Asia-Pacific |
Largest Market | North America |
Market Concentration | Medium |

Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

Extended Stay Hotel Market Analysis by Mordor IntelligenceThe Extended Stay Hotel Market was valued at USD 58.97 billion in 2025 and is estimated to grow from USD 59.86 billion in 2026 to reach USD 99.15 billion by 2031, at a CAGR of 10.62% during the forecast period (2026-2031). This growth reflects a shift in lodging demand driven by project-based employment, hybrid work patterns, and workforce housing gaps, leading to longer booking durations. Developers favor this segment due to its operational model requiring less labor, lighter food service, and standardized layouts compared to full-service hotels. Demand now extends beyond corporate relocations to include weekly project stays, bleisure extensions, and temporary displacements, enhancing year-round occupancy. The market benefits from rising branded pipelines, improved direct booking capabilities, and conversion-led developments, which enhance cost control and speed to market. Despite financing pressures and construction inflation affecting new openings, the market continues to attract investment due to its revenue model, supported by longer average stays and lower room turnover.

Key Report Takeaways* By service level, mid-range properties led with 46.52% of the Extended Stay Hotel Market share in 2025, while upscale and luxury properties are projected to grow at an 11.13% CAGR through 2031.
* By stay duration, monthly stays accounted for 40.14% of the Extended Stay Hotel Market share in 2025, while weekly stays are projected to grow at an 11.73% CAGR through 2031.
* By booking channel, direct digital bookings represented 38.92% of transactions in the Extended Stay Hotel Market in 2025, while Online Travel Agencies (OTAs) are projected to grow at a 12.94% CAGR through 2031.
* By end user, business customers contributed 34.31% of demand in the Extended Stay Hotel Market in 2025, while relocating residents and insurance-displaced guests are projected to grow at a 12.57% CAGR through 2031.
* By geography, North America led with 36.86% share in the Extended Stay Hotel Market in 2025, while Asia-Pacific is projected to grow at an 11.04% CAGR through 2031.

Key Market Trends

Market Trends and InsightsDrivers Impact Analysis of Extended Stay Hotel Market*

Drivers	(~) % Impact on CAGR Forecast	Geographic Relevance	Impact Timeline
Corporate relocation and project-based lodging demand	+2.5%	North America, Europe, Asia-Pacific	Long term (≥ 4 years)
Hybrid work and bleisure extending length of stay	+1.8%	Global	Medium term (2-4 years)
Kitchen-equipped suites value advantage	+1.2%	Global	Short term (≤ 2 years)
Labor-light operating model attracts developers	+1.5%	Global	Medium term (2-4 years)
Workforce housing spillover from industrial megaprojects	+2.0%	North America, Middle East and Africa	Long term (≥ 4 years)
Insurance displacement and recovery-worker stays	+0.8%	North America	Short term (≤ 2 years)

Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The extended-stay hotel market remains moderate, with major operators maintaining significant brand presence and geographic reach. Marriott International, Hilton Worldwide Holdings, Extended Stay America, IHG, and Choice Hotels International collectively accounted for a substantial share of global revenue in 2025. However, no single company dominates pricing or development decisions across the sector. This fragmentation allows aparthotel specialists, regional operators, tech-enabled furnished apartment platforms, and conversion-focused brands to compete alongside global hotel groups. Factors such as product positioning, corporate account access, brand trust, and development speed are critical, enabling both global chains and niche operators to succeed in specific markets or use cases.

Large companies are expanding platforms, restructuring brand portfolios, and forming partnerships to reduce distribution challenges. Marriott advanced StudioRes into the midscale segment while integrating citizenM and licensing Sonder. Hilton introduced Apartment Collection by Hilton in early 2026, focusing on residential-hospitality hybrids with furnished apartments under its standards. Choice Hotels reported consecutive quarters of extended-stay net room growth in the United States, with extended-stay projects forming a significant portion of its domestic pipeline. BWH Hotels entered the segment with the launch of @HOME by Best Western in the United States, planning additional properties globally by the end of 2026. These developments highlight the market's evolution through brand diversification, partnerships, and increased focus from established hotel groups.

Opportunities are evident in secondary cities near industrial projects, long-stay supply in select Asia-Pacific locations, and accommodations tied to insurance or workforce partnerships. Blueground expanded its housing partnerships, offering healthcare travelers access to thousands of furnished apartments across multiple cities. This platform model competes with hotels by appealing to guests seeking flexibility, apartment-style living, and digital booking ease. Meanwhile, large hotel companies leverage loyalty programs, franchise systems, and brand credibility to retain corporate demand and accelerate project pipelines. The market is unlikely to consolidate around a single model, as diverse guest preferences drive demand for varied formats and pricing structures.

Extended Stay Hotel Industry Leaders* Marriott International

* Hilton Worldwide Holdings

* Extended Stay America

* InterContinental Hotels Group

* Choice Hotels International

* *Disclaimer: Major Players sorted in no particular order

Component Component 3 Scope Of The Report Bottom

Global Extended Stay Hotel Market Report ScopeBy Service LevelEconomy |
Mid-range |
Upscale and Luxury |

Segmentation Accordion Item

By GeographyNorth America | United States |
| Canada |
| Mexico |
South America | Brazil |
| Peru |
| Chile |

	Argentina
	Rest of South America
Europe	United Kingdom
	Germany
	France
	Spain
	Italy
	BENELUX (Belgium, Netherlands, and Luxembourg)
	NORDICS (Denmark, Finland, Iceland, Norway, and Sweden)
	Rest of Europe
Asia-Pacific	India
	China
	Japan
	Australia
	South Korea
	South East Asia (Singapore, Malaysia, Thailand, Indonesia, Vietnam, and Philippines)
	Rest of Asia-Pacific
Middle East And Africa	United Arab Emirates
	Saudi Arabia
	South Africa
	Nigeria
	Rest of Middle East And Africa

Frequently Asked Questions

What is the current size of the extended stay hotel market?

The extended stay hotel market size stood at USD 58.97 billion in 2025 and is expected to reach USD 59.86 billion in 2026 before rising to USD 99.15 billion by 2031.

What is driving growth in extended stay hotels worldwide?

Growth is being supported by project-based lodging demand, hybrid work, bleisure travel, workforce housing shortages, and rising demand from relocating and insurance-displaced guests.

Which region leads global revenue in extended stay hotels?

North America led the extended stay hotel market with a 36.86% share in 2025, supported by deep branded supply and strong industrial and corporate travel corridors.

Which region is growing fastest in long-stay lodging?

Asia-Pacific is forecast to grow fastest at an 11.04% CAGR through 2031, supported by strong travel flows, relocation activity, and rising long-stay product development.

Which service tier is largest in extended stay hotels?

Mid-range properties led with 46.52% share in 2025 because they match the needs of workforce travelers, project employees, and value-focused corporate guests.

Which guest segment is expanding fastest?

Relocating residents and insurance-displaced guests are expected to grow fastest at a 12.57% CAGR through 2031, reflecting the segment's rising role in temporary housing demand.