YIELD · SEASONALITY

Bali villa occupancy rates and seasonality

September 24, 2026 · 8 min read · **Yields**

The average short-term listing in Bali fills about a third of its nights, while star hotels fill well over half their rooms. A villa makes most of its money between May and October, and February and March eat into it.

Read online: https://riserealbali.com/guides/bali-villa-occupancy-rates/

IN SHORT

The average short-term rental in Bali filled 36% of nights over the 12 months to September 2026 (AirROI), and main villa areas ran at 36–46%. Star hotels swung from 46.6% in March 2025 to 69.5% that August (BPS Bali). Well-managed villas reach 60–75% a year. February and March are the weakest months.

36.0%
average occupancy of a Bali short-term listing (AirROI, 2026)

69.5%
star-hotel occupancy in August 2025, the year's peak

46.6%
star-hotel occupancy in March 2025, the year's low

60–75%
occupancy we model for a professionally managed villa

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Three occupancy numbers, and which one to use

You'll see three occupancy figures quoted for Bali, and each one measures something different. The first comes from AirROI, which tracks every short-term listing on the booking platforms: its island average is 36.0%, and the main villa areas run from 36.2% in Canggu to 46.2% in Uluwatu.

The second is BPS Bali's monthly count for star-rated hotels, which lands between 46% and 70% depending on the month. The third is what a villa with a full-time manager actually achieves. In our practice that's 60–75% over a year.

Treat the platform average as your floor and the managed-villa range as your base case. Hotel occupancy doesn't belong in a villa model at all. A hotel fills its quiet months with tour groups and conferences, and a private villa has no such channel.

36.0%
all Bali listings, AirROI

36–46%
main villa areas, AirROI

60–75%
managed villa, our practice

Source: AirROI, trailing 12 months as of September 12, 2026; BPS Bali monthly tourism releases; Rise Real Bali practice, 2024–2026

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Month by month: hotel occupancy in 2025 and 2026

Hotel data is the only monthly series published for Bali, so it's the best public read on the season. In 2025 star hotels bottomed out at 46.6% in March and peaked at 69.5% in August. That's a 23-point swing between the weakest and strongest months.

The 2026 low was shallower. March came in at 52.5% and July at 67.3%, according to the BPS release of September 1. A private villa swings harder than any of these hotel numbers, because it has no groups or conferences to fill the gap.

Star-hotel occupancy in Bali by month

MONTH	2025	2026
January	60.3%	56.7%
February	51.6%	55.4%
March	46.6%	52.5%
April	57.2%	57.9%
May	58.1%	61.2%
June	64.7%	64.9%
July	67.8%	67.3%
August	69.5%	—
September	68.2%	—
October	64.6%	—
November	58.0%	—
December	60.9%	—

Source: BPS Bali, monthly tourism releases for 2025 and January–July 2026

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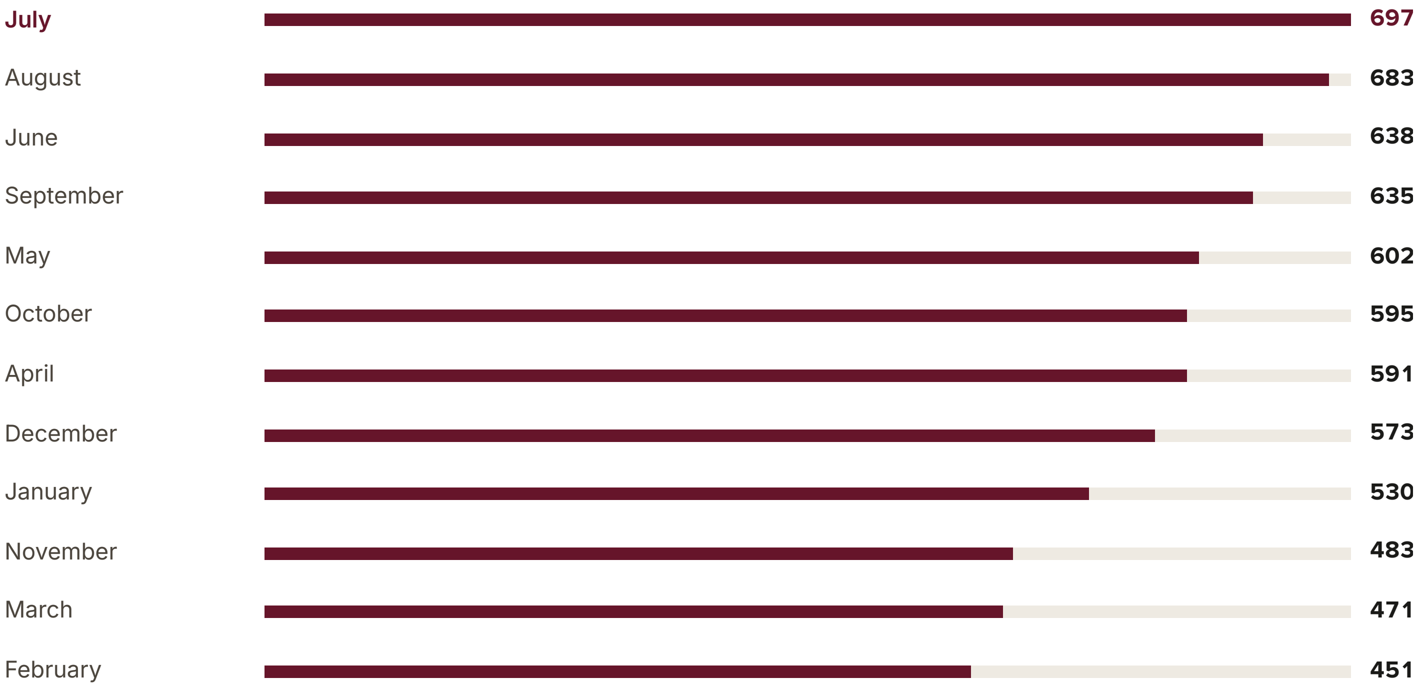
Who fills the peak

Bali's season follows other countries' school calendars more than its own weather. Australia sent 1.63 million of the island's record 6.95 million foreign arrivals in 2025, close to a quarter, and its July holidays drive the year's biggest month.

Arrivals ran from 451,000 in February to 697,000 in July. The Christmas and New Year fortnight adds a short second peak at the highest nightly rates of the year.

Foreign arrivals to Bali by month, 2025, thousands



Direct foreign arrivals. The 2025 total of 6.95 million was a record for the island.

Source: BPS Bali, direct foreign arrivals, January–December 2025, released February 2, 2026

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The rainy season in numbers

The wet season runs from November to March, with the heaviest rain from December to February. Denpasar's 1991–2020 climate normal puts January at about 350 mm over 19 rainy days, while August gets 15 mm over three. Other datasets put January lower, near 280 mm, but the shape of the year is the same.

In practice a rainy day means one or two downpours of 40 to 90 minutes, usually in the afternoon or at night. Mornings are mostly usable. Guests still come. There are just fewer of them.

The effect shows in the numbers. Star-hotel occupancy fell to 56.7% in January 2026, from 60.9% in December. Non-star hotels and other lodging dropped harder, from 39.6% to 32.7%. Bank Indonesia's survey recorded room prices 5.85% lower in the first quarter of 2026 than in the fourth quarter of 2025.

350 mm
January rainfall, Denpasar normal

32.7%
non-star lodging occupancy, January 2026

–5.85%
room prices, Q1 2026 vs Q4 2025

Source: climatestotravel.com, Denpasar 1991–2020 normal; BPS Bali release of March 2, 2026; Bank Indonesia commercial property survey via JPNN Bali, May 21, 2026

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Rates move with the season too

Rates fall with occupancy. Horwath HTL puts Bali's average hotel room rate for 2025 at about Rp 2.4 million, rising roughly 17% above that in July and August. In February and March, revenue per available room falls to Rp 1.3–1.4 million, close to half the peak month.

So the most common mistake in a yield pitch is multiplying an August nightly rate by 365. On hotel data alone it overstates a year's revenue by about a third, and for a villa, with its sharper swing, the gap is wider.

> Model a year on the annual average rate and annual occupancy. Then check that the villa survives two months below 50% without the owner topping up the running costs.

Source: Horwath HTL, Bali Hotel & Branded Residences 2026; C9 Hotelworks monthly data; Rise Real Bali calculation from BPS monthly occupancy

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Dates that break the calendar

Nyepi, the Balinese day of silence, shuts the island for 24 hours. In 2026 the airport closed from 6 a.m. on March 19 to 6 a.m. on March 20, and airlines suspended 440 flights. Nobody checks in or out that day, and guests stay inside the villa.

Galungan and Kuningan follow a 210-day Balinese cycle, so their dates shift every year and move local demand. Check the dates before you set an opening day or a pricing calendar.

- FEBRUARY
  Chinese New Year
  A short spike in arrivals from China, followed by a quiet March.
- MARCH
  Nyepi
  Airport closed for 24 hours. Block the dates in advance.
- JULY
  Australian school holidays
  The biggest month of the year for arrivals, occupancy and nightly rates alike.
- LATE DECEMBER
  Christmas and New Year
  Two weeks at the year's highest nightly rates.

Source: ANTARA News and Tempo, March 2026; Balinese Pawukon calendar

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Timing a new villa's launch

The month a villa opens shapes its first year. One that starts renting in April collects reviews before the July peak. One that opens in November spends its first months in the slowest quarter, with no reviews to lift it.

We plan handover and launch for April to June where the build schedule allows. November to March is the time for repairs, a switch of management company or a new photo shoot. It's also when owners who use their own villa should book their stays.

- ✓ Build the yield model on the annual average rate, not the peak rate
- ✓ Allow for two months below 50% occupancy
- ✓ Ask the management company what it does in February and March
- ✓ Plan your own stays for the low season
- ✓ Aim for an April–June launch if you're buying off-plan

Source: Rise Real Bali practice

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Putting it into a model

Occupancy is one input. The nightly rate, management costs and tax decide the rest, and our rental yield guide shows how the five main areas compare on gross and net. Area pages for Uluwatu, Pererenan and Canggu list local occupancy.

To test a property at 50, 60 and 70%, use the yield calculator or send us a listing from the catalog and we'll model it.

What this means for buyers

01 The average Bali listing fills 36% of the year. A well-managed villa reaches 60–75%.

02 Hotel occupancy swung from 46.6% in March 2025 to 69.5% in August. Villas swing harder.

03 Multiplying the August rate by 365 overstates revenue by a third or more.

04 Launch a new villa in April–June so it has reviews before the July peak.

FAQ

What is the average occupancy rate for a villa in Bali?

The average short-term listing filled 36.0% of nights over the 12 months to September 2026, per AirROI. Main villa areas range from 36.2% in Canggu to 46.2% in Uluwatu. Professionally managed villas reach 60–75% in our practice.

What is occupancy like in Bali's rainy season?

Noticeably lower. Star-hotel occupancy fell to 46.6% in March 2025 and 56.7% in January 2026, against 69.5% in August 2025 (BPS Bali). Non-star lodging dropped to just 32.7% in January 2026, and room prices across the island fell 5.85% in the first quarter.

When is high season for villa rentals in Bali?

July and August are the peak for both occupancy and rates, driven by Australian school holidays. May, June, September and October are strong. The last two weeks of December bring a short second peak.

Which months are worst for rental income?

February and March. Arrivals bottom out at about 450,000–470,000 a month, the rain peaks, and Nyepi closes the airport for a day in March. Revenue per room drops to about half the peak month.

Should I avoid buying before the low season?

You can buy in any month. Timing matters for the launch: a villa that starts renting in April to June gathers reviews before the peak, while one that opens in November starts in the weakest quarter.

How we know this

Listing occupancy comes from AirROI's trailing 12-month data, checked in September 2026. Monthly hotel occupancy is BPS Bali's count for star-rated hotels, from its monthly tourism releases for 2025 and January to July 2026. Arrivals are BPS Bali's direct foreign arrivals. Hotel rates and revenue per room are from Horwath HTL's 2026 report and C9 Hotelworks. Rainfall is the 1991–2020 normal for Denpasar. The managed-villa range of 60–75% is our own practice, not a published statistic. Hotel and villa occupancy measure different markets, and we keep them apart rather than average them.

— AirROI, Bali short-term rental data, trailing 12 months as of September 12, 2026

— BPS Bali, monthly tourism releases, 2025 and January–July 2026

— BPS Bali, foreign arrivals January–December 2025, February 2, 2026

— Horwath HTL, Bali Hotel & Branded Residences 2026

— C9 Hotelworks, Bali hotel and branded residences report

— Bank Indonesia commercial property survey, via JPNN Bali, May 2026

— climatestotravel.com, Denpasar climate normal 1991–2020

— ANTARA News and Tempo, Nyepi airport closure, March 2026

By Dmitrii Rogov, Rise Real Bali.

Disclaimer

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