



JERSEY SHORE

STR MARKET REPORT

2025 Year in Review

Platform dynamics, town-by-town performance data, and specific revenue benchmarks for 3BR+ Monmouth County Jersey Shore property owners heading into 2026 summer season.

\$70,470

Average revenue per property on VRBO, 39% higher than Airbnb

1.52x

Guest Favorite properties earn 52% more revenue market-wide

\$99,160

Median VRBO revenue for a 3BR in Asbury Park

February 2026 | Multiple Data Sources including PriceLabs, Rabbu & AirDNA

Executive Summary

The key insights and what they mean for Monmouth County property owners

Most Shore property owners are listing on the wrong platform. That one decision is costing them 20% to 200% of their potential revenue every single year. Across \$122 million in estimated rental revenue and 2,448 active listings in Monmouth and Ocean Counties, the data tells a clear story: **where you list matters just as much as what you list, and most owners are getting it wrong.**

VRBO properties in Monmouth County's core beach towns consistently outperform Airbnb by 20% to 200%, depending on the town. In Belmar, the gap is 76%. In Asbury Park, VRBO earns nearly 3x what Airbnb does. And then there's the management quality story: Guest Favorite properties earn a 52% premium market-wide, up to 1.97x in Asbury Park. This isn't a marginal improvement. It's the difference between a property that covers its mortgage and one that funds your retirement.

AT A GLANCE: MONMOUTH COUNTY CORE TOWNS

Metric	Airbnb	VRBO	Gap
Avg Revenue/Property	\$50,790	\$70,470	VRBO +39%
Avg Occupancy	47%	35%	Airbnb higher
Avg ADR	\$398	\$672	VRBO +69%
Active Listings	2,246	1,152	2x Airbnb supply
Avg Booking Window	20 days	71 days	VRBO 3.6x longer
Avg Length of Stay	2 nights	3 nights	VRBO +50%
YoY Revenue Change	-\$460	+\$5,868	VRBO growing
New Listing Growth	+43	-131	VRBO supply tightening

KEY TAKEAWAYS

VRBO Is Not Optional. It Is Where the Money Is. Across every Monmouth County beach town except Ocean Grove, VRBO generates significantly higher revenue per property than Airbnb. The premium ranges from 26% in Bradley Beach to 76% in Belmar to a staggering 3x in Asbury Park. VRBO's longer booking windows (71 vs 20 days), higher ADR (\$672 vs \$398), and longer stays all compound into a materially different revenue outcome. If you own a 3BR+ Shore property and you're only on Airbnb, you're competing with twice as many listings.

The Guest Favorite Multiplier: 1.52x Market-Wide, Up to 1.97x in Target Towns. Airbnb's Guest Favorite badge is the closest thing to a public management quality score, and the revenue gap is enormous. Across Monmouth, Guest Favorite whole-home listings earn a median \$42,600 vs \$28,100 for non-favorites, a 52% premium. That multiplier holds and often increases at the town level. Over half the market still lacks Guest Favorite status. That's not just a badge, it's a \$14,500 per year gap between a well-managed asset and everyone else.

Revenue Benchmarks Vary Dramatically by Town. Cookie-Cutter Strategies Fail. A well-managed 3BR in Belmar should target \$42,000 on Airbnb and \$48,000 on VRBO. That same 3BR in Asbury Park? \$41,000 on Airbnb but \$99,000 on VRBO. Meanwhile, Ocean Grove flips the script entirely: Airbnb outperforms VRBO by



31%, making it the only Shore town where an Airbnb-first strategy actually makes sense. The point is simple, every town has its own playbook, and the owners who figure that out first capture the most revenue.

Supply & Demand

More listings, less money – unless you know where to look

The Jersey Shore STR market now exceeds 2,700 total listings across Airbnb and VRBO, with 2,448 generating measurable revenue. New listings represented 20.6% of the total market (566 new listings), but here’s where it gets interesting: Airbnb added 43 net new listings year-over-year while VRBO saw 131 listings exit the market.

Think about what that means for you. Owners are piling into an increasingly crowded Airbnb market, competing harder for a demand pool that isn’t growing, while the VRBO landscape is getting less competitive. Average revenue per listing on Airbnb actually declined \$460 year-over-year. VRBO revenue? Up \$5,868 per listing. Fewer competitors, more money. That’s a window that won’t stay open forever.

SUPPLY PICTURE — BY PRIORITY TOWN

Town	Total Active	Airbnb	VRBO	New Listing %	VRBO Winner?
Asbury Park	487	349	138	20.2%	Yes (+55%)
Belmar	274	192	82	19.1%	Yes (+76%)
Bradley Beach	124	78	46	21.8%	Yes (+26%)
Ocean Grove	62	37	25	27.8%	No (Airbnb +31%)
Long Branch	167	117	50	28.8%	Split (parity)

2,448 Active revenue-generating properties	566 New listings added in trailing period	+\$5,868 VRBO revenue per listing YoY growth
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EAM'S TAKE

VRBO supply is shrinking while revenue is growing. This means less competition and more money, but it may not last long. For any Shore owner not on VRBO today, every month you wait is a month of revenue you don't get back.

SEASONAL PERFORMANCE

The Jersey Shore is a season-driven market where June-August generates 60-75% of annual revenue. Shoulder seasons (April-May and September-October) contribute 20-30%; off-season 5-10%. One lost booking in July costs 3-5x more than one lost in February.

Season	Months	% of Annual Revenue	Avg ADR
Peak Summer	June-August	60-75%	\$650-\$850
Shoulder Spring	April-May	10-15%	\$450-\$550



Shoulder Fall	Sept-Oct	10-15%	\$500-\$650
Off-Season	Nov-March	5-10%	\$350-\$450

EAM'S TAKE

Yes, obviously you should absolutely be optimizing for peak summer demand. But what we see over and over is owners leaving significant profits on the table by ignoring shoulder seasons entirely. A thoughtful April-May and September-October strategy can add \$5,000-\$10,000+ in revenue that most owners never capture.

Platform Performance

Same Jersey Shore, completely different economics depending on your OTA platform

Here's something most Shore owners don't realize: platform dominance varies by town in ways that completely change your revenue picture. Choosing which platform to prioritize in your town is one of the highest-leverage decisions you can make, and most owners never think about it strategically.

CHANNEL COMPARISON BY PRIORITY TOWN

Town	Airbnb Med Revenue	VRBO Med Revenue	Winner	Gap	Why
Asbury Park	\$23,955	\$37,116	VRBO	+55%	Higher ADR (\$348 vs \$300)
AP Submarket (3BR+)	\$26,358	\$80,400	VRBO	+205%	Larger whole-homes on VRBO
Belmar	\$29,315	\$51,712	VRBO	+76%	ADR gap (\$518 vs \$375)
Bradley Beach	\$36,527	\$45,999	VRBO	+26%	VRBO family bookings longer
Ocean Grove	\$41,301	\$28,402	Airbnb	+31%	Artsy Airbnb demographic
Long Branch	\$25,148	\$24,419	Airbnb	+3%	Mixed market split

The crossover point is right around 2BR: below that, Airbnb tends to win. Above that, VRBO dominates. If you own a family-sized Jersey Shore home (3BR+), which is where the real revenue is at the Shore, VRBO should be your primary platform, with Airbnb filling in supplemental demand. Even strong 2BR properties in the right towns can benefit significantly from dual-platform exposure.

PLATFORM STRATEGY BY TOWN

Town	Primary Platform	Why (in brief)
Belmar	VRBO-primary (60-65% bookings)	76% ADR premium over Airbnb
Bradley Beach	Dual-platform balanced	Moderate VRBO edge; optimize both
Asbury Park (3BR+)	VRBO-dominant	3x revenue gap vs Airbnb



Ocean Grove	Airbnb-primary	Only Shore town where Airbnb wins
Long Branch	Test both; optimize by property type	Property level nuance hides waterfront vs inland split

EAM'S TAKE

Single-platform owners are leaving money on the table, whether that's an Airbnb-only owner in Belmar missing 76% more VRBO revenue, or a VRBO-only owner in Ocean Grove missing 31% more Airbnb revenue.

Jersey Shore owners need to incorporate a multi-channel marketing strategy if they want to maximize their share of peak demand.

Revenue Optimization Levers

What actually separates the top 25% from everyone else

Three levers drive Shore revenue: platform strategy, management quality, and amenities, in that order. Here's what we see over and over: most owners skip the first two and go straight to asking about pools and hot tubs. We get it, amenities are tangible and fun to think about. But the data is clear: you need to fix your platform visibility and management quality first. That's where 80% of the gap in revenue occurs.

THE MANAGEMENT QUALITY MULTIPLIER

Town	Guest Fav Med Revenue	Non-GF Med Revenue	Multiplier
Sea Bright	\$52,850	\$21,614	2.45x
Asbury Park	\$40,271	\$20,459	1.97x
Bradley Beach	\$42,178	\$22,878	1.84x
Long Branch	\$38,054	\$26,834	1.42x
Belmar	\$38,671	\$23,244	1.66x
Manasquan	\$45,650	\$31,863	1.43x
Brick/Normandy	\$37,289	\$27,800	1.34x
Market-Wide	\$42,636	\$28,070	1.52x

1.52x

Guest Favorite revenue multiplier market-wide

52%

Revenue premium for GF-status listings

50%+

Listings without Guest Favorite status



AMENITY REVENUE PREMIUMS

Amenity	% Penetration	Med Rev With	Med Rev Without	Premium
Pool	9.3%	\$72,830	\$33,868	+115%
Hot Tub	6.0%	\$65,471	\$34,568	+89%
Parking	94.4%	\$35,724	\$21,787	+64%
EV Charger	2.7%	\$52,665	\$34,895	+51%
Balcony/Deck	60.6%	\$41,106	\$28,256	+45%
Waterfront	13.6%	\$46,987	\$34,271	+37%
Beachfront	4.2%	\$43,073	\$34,959	+23%

EAM'S TAKE

Here's something that might surprise you: savvy owner-operators and boutique managers outperform large portfolio managers by 33% (\$38,700 vs \$29,100 median revenue). Why? Because most traditional property managers and self-managing owners aren't keeping up with how fast this industry moves. Best practices around SEO changes, OTA fee structures, revenue management strategies are must haves in today's environment. The owners who stay current (or hire someone who does) are pulling away from the pack.

Pause. What's Your Revenue Optimization Score?

Be honest with yourself, this is where the money hides

Before you keep reading, take 30 seconds and rate yourself across these 7 factors. Be honest. If you're scoring mostly in the middle column, our data suggests you're leaving \$15,000 to \$30,000+ per year on the table compared to optimized properties in your town. That's not a typo; it's the real numbers between "fine" and "fully optimized."

Factor	Crushing It ✓	Leaving Money →	Bleeding Revenue ✗
Platform	Dual-listed, optimized on both	One platform only	Unlisted or inactive
Pricing	Dynamic, weekly adjustments	Seasonal adjustments	Flat rate year-round
Guest Experience	4.9+ rating, 20+ reviews	4.8-4.85, 8-20 reviews	Below 4.7 or <8 reviews
Listing Quality	Pro photos, optimized copy, clear UVP	Basic photography, no captions, generic title	Low-quality images and listing copy, no understanding of guest
Amenities	4+ high-impact amenities	2-3 amenities	Fewer than 2



Management	Owner or boutique (<15 properties)	Professional, <25 properties	Large portfolio (25+)
Positioning	3+ upgrades, repriced to market	Well-maintained, not upgraded	Aging, behind market

EAM'S TAKE

Most Shore properties score in the middle across 3-4 factors. We know that “middle” feels safe, but it’s expensive – it’s the difference between a property earning \$28,000 and one earning \$42,000+. If you own in Belmar, Bradley Beach, or Asbury Park, your gap is likely even larger than that. We’ve also found that a lot of owners in these towns are not implementing national best practices, which means there’s real opportunity for those who are willing to do things differently.

Ready to see your actual number? Schedule a free Profit Gap Analysis at <https://calendly.com/contact-endlessassetmanagement/pg-a-jersey-shore> and we’ll show you exactly what you’re leaving on the table, with real comps from your town and bedroom count. Not ready to talk yet? Keep reading. The town-by-town data below will sharpen the picture even further.

Town Profiles

Deep dives on Monmouth County’s highest-opportunity shore towns

BELMAR

The Family Beach Town with Incredible Potential

274 active listings | **76%** VRBO premium | **1.66x** Guest Fav multiplier | **68%** Guest Fav rate

NJ Transit puts Belmar about 2 hours from Penn Station. A walkable downtown with restaurants and bars drives weekend demand. Yet only 82 of 274 active listings appear on VRBO despite a 76% revenue premium. The Belmar owner who adds VRBO and optimizes listing quality has a clear, data-backed path to significant revenue growth.

3BR & 4BR Benchmarks

BR	Airbnb Med	Airbnb P75	VRBO Med	VRBO P75
3BR	\$35,943	\$57,144	\$41,938	\$72,483
4BR	\$52,063	\$83,550	\$60,554	\$100,809

Belmar has some of the most owner friendly summer rental policies in Monmouth County. We find it very easy to operate by the book and always enjoy working with their staff.

BRADLEY BEACH

The Highest Management Multiplier on the Shore

124 active listings | **25.9%** VRBO premium | **1.84x** Guest Fav multiplier | **100%** whole-home rate

Small market, outsized opportunity. At 124 active listings, individual property optimization moves the needle significantly. The top performing listings here are whole homes or apartments with ocean views. The Guest



Favorite multiplier of 1.84x is the highest among priority towns, meaning the gap between well-managed and poorly managed is enormous.

3BR & 4BR Benchmarks

BR	Airbnb Med	Airbnb P75	VRBO Med	VRBO P75
3BR	\$42,220	\$54,846	\$45,999	\$80,444
4BR	\$55,747	\$75,059	\$79,322	\$89,002

Bradley Beach is also interesting because of their C/O and fee schedule, which can be tricky to navigate during peak season so we suggest really doing your homework if you're not familiar to make sure you're compliant and collecting the right taxes.

ASBURY PARK

The VRBO Goldmine Hiding in Plain Sight

487 active listings (largest) | **205%** VRBO premium (submarket) | **1.97x** Guest Fav multiplier | **2.3** avg bedrooms

Asbury Park is the Shore's most complex market, with heavy regulations, neighborhood-by-neighborhood dynamics, and a real split between property types. The headline number (**\$27,311** combined median) masks a two-tier market: small units (studio-2BR) competing on Airbnb for weekend guests, and larger family homes (3BR+) that absolutely dominate on VRBO. The platform arbitrage here is extraordinary: VRBO properties earn a median \$80,400 vs Airbnb's \$26,358, a 205% premium. For 3BR specifically: VRBO \$99,160 vs Airbnb \$41,205 (2.4x). Let that sink in. If you own a 3BR+ in Asbury Park and you're only on Airbnb, you could be leaving \$50,000 to \$60,000 per year on the table. *Yes, read that again.*

3BR & 4BR Benchmarks

BR	Airbnb Med	Airbnb P75	VRBO Med	VRBO P75
3BR	\$41,205	\$64,570	\$99,160	N/A - Unavailable
4BR	\$88,047	\$110,593	\$96,789	N/A - Unavailable

Asbury Park has become notorious with strong regulations around short-term rentals including requiring homeowners to obtain a permit, maintain permanent residency, and comply with occupancy limits and restrictions on permits for multi-family properties. We encourage you to do your research as compliance is key to operating successfully in Asbury.

OTHER TOWNS WORTH WATCHING

Ocean Grove

The Shore's contrarian market (62 listings). Airbnb outperforms VRBO by 31% for 1-3BR properties, driven by the town's historic Victorian character and Airbnb-native demographic. The exception: at 4BR+, VRBO takes over dramatically (\$74,324 vs \$17,173). Urgency signal: 27.8% new listing growth rate in a 62-listing market means 17 new competitors. You'll want to optimize now, or you'll get priced into the middle.

Long Branch



167 listings. Platforms at near parity (+3% Airbnb). A split market: premium beachfront/Pier Village properties command luxury pricing (7BR median \$122,143 on Airbnb), while inland properties compete at commodity rates. Neither platform dominates at the aggregate level. You'll need to test both and optimize by your property type.

BROADER JERSEY SHORE CONTEXT

Town	Active	Med Rev	Notable
Manasquan	199	\$44,622	Strong 3BR+, VRBO +31%
Spring Lake	104	\$35,715	Premium, VRBO +38%
Sea Bright	60	\$45,594	VRBO +53%, GF 2.45x
Monmouth Beach	20	\$115,739	Ultra-premium, tiny market
Avon-by-the-Sea	18	\$51,556	Small but strong
Sea Girt	15	\$48,016	Premium, limited supply

This is exactly why cookie-cutter strategies don't work on the Shore. Each town has its own dynamics, different platform preferences, different guest demographics, different regulatory environments. The owners who take the time to understand their specific market, neighborhood, and property type are the ones generating those higher-than-average returns. It's not about working harder. It's about working smarter with the right data.

2026 Outlook

What we're watching and the dates that matter most

So what's next with 2025 in the books and 2026 summer approaching us in a few months? We're expecting the slowdown that some operators felt over the last two years for those that are not putting in the work to optimize their properties, pricing, amenities, guest experience, platform strategy, etc.

The revenge travel boom that lifted prices and occupancy a few years ago? It's over. The owners who are going to win in 2026 and beyond are the ones who prioritize the things we've outlined in this report, platform strategy, pricing discipline, guest experience, and management quality.

Below are the key dates and pricing windows we're already preparing for in 2026. Early booking data and event calendars are revealing specific demand spikes, and the properties that are priced and positioned ahead of these windows will capture the most value. Don't wait until June to start thinking about summer.

HIGH-VALUE DATES TO WATCH

Event / Period	Dates	Expected Demand	Pricing Action
Easter Week	March 29-April 5	High (family travel)	Price +15-20% ASAP
Memorial Day Weekend	May 23-26	Very High (kickoff)	Price +25-35% by April 1
Summer Peak	June 15-Aug 31	Extreme (10-12 weeks)	Dynamic weekly adjustments

Independence Day	July 1-7	Extreme (peak of peak)	Price +30-40%; likely sold out
Shore Event Season	July-August	High (event-driven)	VRBO group bookings +50%
Labor Day Extended	Aug 30-Sept 7	Very High	Price +20–25% by July 15
Local Summer	Sept 9-Oct 7	High	Keep summer pricing a few weeks longer
Sea Hear Now Festival	Sept 19-20	Very High	Price +15-20% by March 1
Fall Fun	Oct 1-13	Medium (regional)	Target PA families; +10-15%
Thanksgiving–NYE	Nov 24-Jan 5	Low-Medium	Holiday premium only

EAM'S TAKE

The Jersey Shore STR market is consolidating around quality operators. Supply will grow 5-10% in 2026, but the gap between owners who optimize effectively (or hire someone who will) and those who don't is only going to widen. The middle of the market is getting squeezed, and that's where most owners currently sit.

What This Looks Like in Practice

A real EAM property in Bradley Beach

Everything we've covered in this report, from platform strategy and management quality to pricing optimization, sounds great on paper, we're sure. But what does it actually look like when you put it all together?

As an example, last year around this time, we onboarded a property in Bradley Beach. Within 60 days of launching, we had sold 5 months of dates. Not at discount rates but at 90th percentile pricing, including offseason months that most owners struggle to fill at any price. We also secured direct bookings outside of the OTAs and earned the Airbnb Guest Favorite badge for the listing, which has continued to drive premium bookings and increased visibility ever since.

That's not luck. It's the result of doing exactly what this report outlines: optimizing across platforms, implementing dynamic pricing with weekly adjustments, investing in professional positioning, and delivering a guest experience that earns 5-star reviews consistently. The data in this report isn't theoretical, it's what we execute every day.



Your Next Step

Find out exactly what your property should be earning

You've seen the market data. You know what top performers are earning in your town. The question now is simple: how does your property compare, and what would it take to close the gap?

Get a free Profit Gap Analysis: a 30-minute-deep dive comparing your property's actual performance against optimized rentals in your exact town and category. Here's what you'll walk away with:

- Your specific profit gap number – what you're earning now vs. what the data says you should be
- 3-5 highest-impact ways to increase revenue for your property
- What top performers in your segment are doing differently
- An honest assessment of whether professional management would actually increase your net income

LIMITED AVAILABILITY

We're only taking on 3 new management clients this quarter to ensure every property gets the attention it deserves. The Jersey Shore's summer pricing windows are approaching quickly. The properties that sign on before March 21 and optimize before April will capture the most value.

Schedule Your Free Profit Gap Analysis

www.endlessassetmanagement.com/jersey-shore-vacation-rental-management

OUR GUARANTEE

We'll beat your last 12 months of net rental income within the first year, or your next 3 months of management are free. Sign before March 21, 2026, to lock in this guarantee.



About Us

Learn more about Endless Asset Management

We manage a \$17M+ real estate portfolio across 3+ major vacation markets in the U.S., and we do it differently than most. We're not a tech platform that lists your property and hopes for the best. We're owner-operators ourselves, which means we manage your property with the same financial discipline and attention we bring to our own investments.

OUR PHILOSOPHY

We don't take on every property. We take on properties where we know we can make a meaningful difference, and then we deliver.

Full Service. Fully Accountable.

We handle every aspect of short-term rental management, so you do not have to:

- Revenue optimization and dynamic pricing strategy
- Professional positioning, listing optimization, and conversion strategy
- 24/7 guest communication and hospitality-grade service
- Cleaning, quality control, and proactive maintenance systems
- Vendor management and operational oversight
- Transparent reporting with clear financial insights

TAILORED FOR YOU

Every property receives a tailored performance plan built around your goals, whether that is cash flow, long-term appreciation, or legacy preservation.

Why Owners Choose EAM

- \$17M+ actively co-managed portfolio across diverse markets
- Systems, processes, and track record built at the Jersey Shore and proven across multiple markets
- Luxury-focused standards that protect high-value assets
- Financial precision rooted in CPA and investment experience
- Hands-on founder who treats every property like their own

We get it, these aren't just listings. They're real investments, often in places that mean something to you personally. If you're looking for a management partner who thinks like an owner, executes with precision, and is accountable for results, that's exactly what we built EAM to be.

LET'S WORK TOGETHER

If anything in this report made you think "that could be my property," let's talk. We'll show you exactly where the opportunity is and whether working together makes sense for both of us.

Schedule Your Free Profit Gap Analysis

www.endlessassetmanagement.com/jersey-shore-vacation-rental-management