

Southeast Asia Online On-Demand Home Services Market: Current Analysis and Forecast (2025-2033)

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Abstracts

The Southeast Asia Online On-Demand Home Services market was valued at ~USD 137.51 million in 2024 and is expected to grow at a strong CAGR of approximately 14.25% during the forecast period (2025-2033F), driven by rising urban middle-class households.

Southeast Asia Online On-Demand Home Services Market Analysis

On-demand home services are household services that are digitally ordered via mobile apps or a web platform, where an individual arranges professional assistance to undertake activities such as cleaning, repairs, beauty care, pest control, laundry, and relocation, depending on immediate or scheduled needs. The platforms bridge the gap between end users and validated service providers and allow digital payments, service monitoring, and customer rating.

In Southeast Asia, market players are introducing mobile-first booking, AI-powered service matching, real-time technician tracking, digital wallet integration, recurrent service packages as subscriptions, and multilingual customer support to build platform utilization. Also, major operators are now extending their service offerings beyond cleaning and repairs to include wellness, appliance maintenance, and relocation to enhance basket value per user. In addition, the platforms invest in partner training modules, a service quality control system, customer review algorithms, and hyperlocal distribution of technicians to enhance trust and the frequency of repeat bookings. The second-tier expansion, shorter response-time frameworks, and app-based promotional initiatives are becoming popular to enhance customer retention and platform scalability in fragmented urban markets. Furthermore, the growing investment in AI-enabled booking platforms is driving market demand.

On February 12, 2026, Grab Holdings, the Southeast Asian super app, unveiled a bold roadmap to triple its adjusted profit by 2028. The prominent top delivery firm is betting on artificial intelligence and the expansion of new services, such as online groceries and financial products. In line with recent announcements, Southeast Asia's ride-hailing has shifted from subsidy-fueled expansion to a profitability push. Companies are now contending with rising operating costs while seeking AI-optimized super applications to monetise financial services.

Southeast Asia Online On-Demand Home Services Market Trends

This section discusses the key market trends that are influencing the various segments of the Southeast Asia Online On-Demand Home Services market, as found by our team of research experts.

Integration of Real-Time Tracking Features

The incorporation of real-time tracking capabilities is becoming a primary trend in the online on-demand home services market in Southeast Asia, as clients increasingly demand visibility into services akin to those offered by ride-hailing applications. Digital platforms enable users to monitor a technician's location, estimated time of arrival, job progress, and service completion via mobile applications. Additionally, it enhances consumer confidence, reduces uncertainty, and improves service reliability, especially in the congested urban markets of Singapore and Bangkok. Also, real-time tracking is useful for optimizing route allocation and technicians' productivity. Moreover, the rising competition in services, tracking capabilities are being used by platforms as a differentiating service to retain users and generate repeat bookings.

Southeast Asia Online On-Demand Home Services Industry Segmentation

This section provides an analysis of the key trends in each segment of the Southeast Asia Online On-Demand Home Services market, along with forecasts at the country level for 2025-2033.

The mobile application segment held a dominant share of the market in 2024.

Based on platform, the market is segmented into mobile application, and web portal. Among these, the mobile application segment held a dominant share of the market in 2024. The main growth driver in the online on-demand home services sector in

Southeast Asia is the use of mobile applications, as mobile phones are the primary platform consumers in urban areas use to book household services. The use of apps adds to the convenience of booking through instant scheduling, online payments, service tracking, and customer ratings, which directly lead to higher repeat usage. Also, the mobile-first ecosystem is beneficial because it enables companies to scale more quickly by reducing customer acquisition friction and enabling location-based service delivery.

The beauty & wellness online on-demand home services market is expected to grow at a significant CAGR during the forecast period (2025-2033).

Based on the service type, the Southeast Asian Online On-Demand Home Services market is segmented into home cleaning, repair & maintenance, beauty & wellness, pest control, laundry & dry cleaning, moving & relocation, and others. Among these, the beauty & wellness online on-demand home services market is expected to grow at a significant CAGR during the forecast period (2025-2033). This drives faster market expansion by increasing platform revenue beyond traditional household upkeep to more valuable personal care reservations. The desire to receive salon services at home, the convenience for working citizens, and rising premium expenditure are driving high service frequency among city households. This segment also enhances customer retention, since it comprises the services customers frequently book rather than repair services. For example, in May 2025, RedDoorz offered in-room massage services across 12 of its Indonesian properties - thanks to a new partnership with home services platform bTaskee. The move is designed to elevate the guest experience through wellness. Guests in Jakarta, Bandung, Tangerang-Karawaci, Yogyakarta, and Bali can now book certified massage therapists directly to their rooms, with options ranging from full-body treatments to reflexology.

Indonesia held a dominant share of the Southeast Asian Online On-Demand Home Services market in 2024

Indonesia led Southeast Asia's online on-demand home services market, which is driven by the large urban population, digital economy growth, and mobile-first consumer market. On July 4, 2025, as per the New Urban Agenda (NUA) in Indonesia, the urban population growth can also be accommodated by increasing the density of the existing urban footprint. In Central Jakarta, the population was 1.07 million in 2024, down from 2023, but still higher than in December 2021. In the last five years, the region experienced annual population growth of 2.94%, higher than the previous period. Major cities like Jakarta and Surabaya have the highest smartphone penetration, and this has

boosted the use of apps for making reservations and accessing cleaning, repair, and maintenance services at home. A wide range of gig workers is also beneficial to the country and enables the quick onboarding of technicians in the digital arena. The growing population of middle-income households and the increasing number of people living in apartments are driving demand for professionalized domestic services. The increased use of digital payments also promotes ease of transactions and platform repeatability.

For example, on October 25, 2024, as per the BPS-Statistics Indonesia, the middle class and those nearing middle-class status make up 66.35 percent of Indonesia's population and contribute to 81.49 percent of household spending. This significant consumption share highlights the middle class as a vital pillar supporting the national economy.

Southeast Asia Online On-Demand Home Services Industry Competitive Landscape

The Southeast Asia Online On-Demand Home Services market is competitive, with several global and international market players. The key players are adopting different growth strategies to enhance their market presence, such as partnerships, agreements, collaborations, new product launches, geographical expansions, and mergers and acquisitions.

Top Southeast Asia Online On-Demand Home Services Companies

Some of the major players in the market are RecomN Technologies Sdn. Bhd., SERVISHERO (BUSINESS PIXEL SDN BHD), bTaskee Co., Ltd., Borigarn, Luce Maintenance Group Pte Ltd, Helpling Singapore Pte. Ltd. (Helpling GmbH & Co. KG), JupViec, Simply Lifestyle Co., Ltd., Grab Holdings Limited, and GetKlean PH.

Recent Developments in the Southeast Asia Online On-Demand Home Services Market

On May 15, 2023, bTaskee Company Limited, a Vietnam company and a leading provider of on-demand household services, announced its professional air conditioner cleaning services. Ensuring a healthy and comfortable living environment, bTaskee's experienced professionals are equipped with modern tools and safe cleaning products to deliver top-quality service.

Frequently Asked Questions (FAQ)

Q1: What is the Southeast Asia Online On-Demand Home Services market's current market size and growth potential?

Ans: The Southeast Asia Online On-Demand Home Services market was valued at ~USD 137.51 million in 2024 and is projected to expand at a CAGR of 14.25% from 2025 to 2033. The growth is being driven by rising smartphone penetration, expanding digital payment adoption, increasing urban middle-class households, and stronger demand for app-based convenience services such as home cleaning, repair, beauty, and maintenance across major Southeast Asian economies.

Q2: Which segment has the largest share of the Southeast Asia Online On-Demand Home Services market by Platform?

Ans: Mobile Application holds the largest share of the Southeast Asia Online On-Demand Home Services market because consumers across Southeast Asia primarily use smartphones for service booking, digital payments, technician tracking, and repeat scheduling. Mobile-first platforms also support stronger customer engagement through notifications, loyalty offers, and subscription-based service models.

Q3: What are the driving factors for the growth of the Southeast Asia Online On-Demand Home Services market?

Ans: Market growth is driven by rapid digital adoption, rising dual-income households, increasing urban apartment living, demand for verified service professionals, and greater consumer preference for transparent pricing and scheduled convenience. Expansion of digital wallet ecosystems and app-based service aggregation also continues to accelerate market adoption.

Q4: What are the emerging technologies and trends in the Southeast Asia Online On-Demand Home Services market?

Ans: Key trends include AI-based technician matching, real-time service tracking, subscription-led recurring service models, multilingual mobile interfaces, digital review systems, and hyperlocal service delivery. Platforms are also increasingly integrating predictive scheduling and customer analytics to improve service efficiency and retention.

Q5: What are the key challenges in the Southeast Asia Online On-Demand Home

Services market?

Ans: Major challenges include fragmented local service competition, inconsistent service quality across cities, workforce retention issues, price sensitivity among users, and limited regulatory clarity around gig worker classification. Maintaining trust and service consistency remains critical for long-term platform growth.

Q6: Which country dominates the Southeast Asia Online On-Demand Home Services market?

Ans: Indonesia dominates the regional market due to its large urban population, strong mobile-first consumer base, expanding digital payments ecosystem, and a broad gig-service workforce that supports high transaction volume across major cities.

Q7: Who are the key players in the Southeast Asia Online On-Demand Home Services market?

Leading companies in the Southeast Asia Online On-Demand Home Services market include:

RecomN Technologies Sdn. Bhd.

SERVISHERO (BUSINESS PIXEL SDN BHD)

bTaskee Co., Ltd.

Borigarn

Luce Maintenance Group Pte Ltd

Helpling Singapore Pte. Ltd. (Helpling GmbH & Co. KG)

JupViec

Simply Lifestyle Co., Ltd.

Grab Holdings Limited

GetKlean PH

Q8: What strategic opportunities exist for investors and service providers in the Southeast Asia Online On-Demand Home Services market?

Ans: Key opportunities include expansion into tier-2 cities, development of subscription-based household service packages, investment in AI-enabled service optimization, and partnerships with residential communities, payment providers, and local technician networks to improve scale and recurring revenue.

Q9: Where are the key investment opportunities in the Southeast Asia Online On-Demand Home Services market?

Ans: Key investment opportunities are emerging in AI-enabled booking platforms, technician training infrastructure, subscription-based household service models, and expansion into underserved secondary cities across Southeast Asia. Investors are also focusing on platforms that integrate digital payments, real-time tracking, and multi-service offerings, as these models improve customer retention, operational efficiency, and long-term recurring revenue potential across the regional home services ecosystem.

Reasons to Buy the Southeast Asia Online On-Demand Home Services Market Report:

The study includes market sizing and forecasting analysis confirmed by authenticated key industry experts.

The report briefly reviews overall industry performance at a glance.

The report covers an in-depth analysis of prominent industry peers, primarily focusing on key business financials, product portfolios, expansion strategies, and recent developments.

Detailed examination of drivers, restraints, key trends, and opportunities prevailing in the industry.

The study comprehensively covers the market across different segments.

Customization Options:

The Southeast Asia Online On-Demand Home Services market can further be customized as per requirements or any other market segment. Besides this, UnivDatos understands that you may have your own business needs; hence, feel free to contact us to get a report that completely suits your requirements.

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