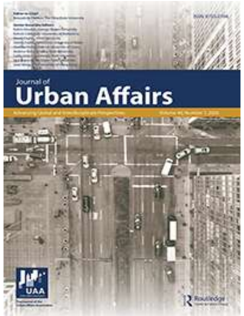

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Mid-term rentals and the Airbnbification of housing

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ABSTRACT
This article critically examines the expansion of the mid-term rental market, situating it within broader debates on the platform economy and the housing crisis. It offers an empirical analysis and mapping of the main digital platforms operating in this segment across Italian cities, to explore their attractiveness for property owners, the ways in which they reshape access to housing for different tenant groups, their role in driving up rental prices and their potential impacts on the most affected cities and neighborhoods. Mid-term rentals, it is argued, constitute a strategic intermediate ground for extending the logics of platformization across the entire rental market. Their effects resemble those observed in the short-term rental segment, while also penetrating more peripheral residential areas, contributing to specific exclusionary and gentrification dynamics, and generating more complex regulatory challenges.

KEYWORDS
Mid-term rentals; platform economy; housing crisis; student housing; temporary populations

Introduction

The role digital platforms play in crucial aspects of everyday lives is well known, as are the effects this phenomenon is having on cities and housing. These debates have mainly focused on short-term rental platforms, whose functioning and impact have inspired a substantial body of research (Cocola-Gant, 2023; Guttentag, 2019). The role of Airbnb in particular has been—and continuous to be—crucial, due to its success and disruptive capacity. The underlying logics, however, have expanded far beyond the short-term segment (Ferreri & Sanyal, 2022; Fields & Rogers, 2021; Gil et al., 2023; Shaw, 2020). In recent years, a related phenomenon emerged: the rapid growth of platforms specialized in mid-term rentals, usually defined as the rental of apartments or rooms from one to twelve months (Cocola-Gant & Malet Calvo, 2023; Orozco-Martínez & Gil Alonso, 2024; Sciuva, 2025b; Wachsmuth & Buglioni, 2024).

This article aims to problematize the expansion of this market and situate it within broader debates on platform capitalism and the urban and housing crisis, to reflect on the implications of the platformization of mid-term rentals for the most affected cities and neighborhoods. To contextualize these dynamics and the policy challenges that shape this sub-market, the article focuses on Italian cities, where the phenomenon is still emerging, rapidly expanding and ambiguously regulated.

We refer to these dynamics as a sort of "Airbnbification" of housing and, consequently, of cities, understood here as denoting not merely the expansion and pervasiveness of Airbnb itself (Mermet, 2022; Rozena & Lees, 2023), but the fact that the underlying logic is expanding into other sub-markets. The digital services we refer to do not merely rely on the internet, which is of course true for most services nowadays, including housing. They explicitly adopt the logics of the platform economy, such as digital automation, algorithmic management and user profiling, experimenting with extending them to the whole rental market. In addition to the emergence of specialized digital intermediaries that

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emulate tourism booking platforms but explicitly target mid-term rentals, Airbnb itself has significantly expanded its user base beyond tourists only, adding the "longer term" option to highlight listings available for periods exceeding 28 days.

The scale and rapid growth of platform-mediated mid-term rentals, as we will show, resemble patterns already observed in the short-term rental sector, while also contributing to significant adaptations. This segment is similarly appealing for both global and local investors, and for specific transnational user groups such as high-spending, hyper-mobile international students, digital nomads and lifestyle migrants. These dynamics may contribute to new and preexisting forms of displacement that resemble elements of both tourism-led and transnational gentrification (Cocola-Gant & Lopez-Gay, 2020; Sigler & Wachsmuth, 2020), thereby exacerbating the housing crisis for both permanent residents and lower-income temporary inhabitants (Brollo & Celata, 2023). The spatiality of the phenomenon partially overlaps with, but also extends beyond, the reach of short-term rentals, offering property owners an additional and very attractive option. Similarly, the actual and potential impacts of this emerging sub-market resemble many of the concerns highlighted in the literature on Airbnb and the platformization of urban services, while also creating distinct challenges.

The next sections first aim to provide a comprehensive analysis and mapping of the main mid-term rental platforms operating in Italy. Previous research has either focused on individual platforms or problematized the spread of mid-term rentals without examining their platformization. To understand how those platforms reshape housing access for various categories of tenants, we then analyze their operational models and business strategies, and how this intermediate segment constitutes the ideal ground for testing the extension of platform capitalism's logics into the broader housing market. Moreover, we present a spatial analysis of the intra-urban concentration of platform-mediated mid-term rentals, comparing it to the distribution of short-term rentals and the rental market at large, to reflect upon potential impacts at the urban and neighborhood levels.

Finally, we delve into how the regulatory framework in Italy contributes to the attractiveness of this sub-market. Mid-term rentals in Italy are regulated by specific contracts that require the temporary housing need to be explicitly justified, and impose caps on rental prices in exchange for generous tax incentives. As a result, permanent residents are largely excluded from such a growing share of the market, unless they can justify a temporary need, while nonresidents inevitably remain so for years and experience prolonged housing precarity. Rental price limits, on the other hand, are apparently ineffective as actual prices, particularly on dedicated platforms, are much higher, contributing to multiple exclusionary dynamics. The Italian case is therefore particularly instructive for understanding the challenges of regulating this sub-market.

Mid-term rentals and the platform economy

In the post-great recession landscape of recent years, digital platforms have become crucial intermediaries, including in the housing market. Understanding housing dynamics under platform capitalism, as noted by Fields (2022), therefore requires attention to the digital infrastructures that enable housing to function as an investment asset in practice, and how those technological changes continue to expand the conditions for asset-based rentiership in post-industrial societies (Ward & Swyngedouw, 2018). The case of Airbnb has already demonstrated how those changes are also fueled by the increasingly mobile character of contemporary lifestyles (Dufty-Jones, 2012). It is precisely at the intersection of the platformization of services, assetization of housing, and hyper-mobility, that the mid-term rental market founds its conditions to flourish and become increasingly platform-mediated.

In terms of digital platforms' distinctive logics, those targeting mid-term rentals are often typically so-called "lean platforms" (Srnicek, 2017). They minimize asset ownership and maximize profitability by monopolizing the intermediation between a dispersed and fragmented local supply, and an equally dispersed and fragmented global demand. This is the model that enabled Airbnb to scale rapidly, transforming what was once a niche—that of private home tourism rentals—into a booming market, and gaining monopolistic advantages through the network effects that characterize the platform economy.

Key components of this model are seemingly simple yet crucial innovations related to competing (also web-based) services: enabling immediate online booking and circumventing the need for in-person inspections, or for direct relationships between buyers and sellers, by providing comprehensive online information and certifying the reliability of this information (Langley & Leyshon, 2017). Central to this solution is the functioning of digital reputation systems—reciprocal reviews, ratings and users' profiles freely provided by hosts and guests—as well as more traditional payment, insurance and reimbursement mechanisms (Celata et al., 2017, 2020). Those mechanisms are also crucial for reinforcing a logic that prioritizes specific types of dwellings in terms of functional characteristics, aesthetic codes and locational advantages, thereby optimizing value-extraction from those assets by property owners, digital platforms and other intermediaries such as property managers (Cocola-Gant et al., 2021). The ecosystem of mid-term rental platforms, however, is also indicative of how such "lean" model is evolving and hybridizing with less dematerialized and asset-light business models, as we will show in the following sections.

The effectiveness of algorithmic management and digital reputation also depends on the volume and frequency of transactions, which must generate a rich and constantly updated flow of user-provided information. This is also why the model initially emerged within the sub-market for very short-term rentals, and possibly why mid-term rentals are emerging as the next frontier, while also requiring several adaptations.

Moreover, monthly rentals are well suited to specific target groups that may be described as quasi-tourists. New or expanding forms of mobile lifestyles are the intersecting theme in this, such as that of international students, leisure migrants, digital nomads or affluent temporary populations more generally (Brollo & Celata, 2023; Cocola-Gant & Malet Calvo, 2023; Colomb & Gallent, 2022; Díaz-Parra et al., 2026; Sciuva, 2025a, 2025b; Sequera, 2025). Brollo and Celata (2023) in particular stressed that although those mobile populations are normally studied separately, they share several characteristics in terms of social status, young age, intensive use of the city, its services and public spaces, housing needs and practices, location preferences within the city, hyper-mobility, temporariness and seasonality. On the other hand, these characteristics to a certain extent resemble those of tourists and, more importantly, produce similar impacts.

A more direct link is that the growth of mid-term rentals is sometimes a consequence of restrictions imposed on short-term ones (Bei, 2025). Wachsmuth and Buglioni (2024), for example, showed how restrictive regulation of short-term rentals in some Canadian cities had limited effects on alleviating the housing crisis also because they led to an unexpected expansion of the mid-term segment, due to a substantial regulatory vacuum. Orozco-Martínez and Gil Alonso (2024) highlighted comparable dynamics in Barcelona, also because of the announced regulation of long-term rental prices, which spurred calls for more comprehensive regulation of temporary housing.

This also implies that apartments rented to tourists can be readily converted into mid-term rentals, and that this can also be a very attractive prospect for property owners in terms of profitability and risk minimization, while having much lower management and administrative costs.

These dynamics were also observed during the pandemic, when declines in tourist arrivals were partially offset by the inflow of other mobile populations, such as remote workers opting for hybrid lifestyles combining vacations and work (Colomb & Gallent, 2022). The pandemic period has also been when many investors, property managers and other key players including Airbnb began paying serious attention to this sub-market. The same applies to some local and national governments. Portugal, and Lisbon in particular, are prime examples of how the attraction of temporary stayers such as retirees, highly qualified professionals, entrepreneurs, digital nomads and international students has become the focus of ad hoc active policies (Cocola-Gant & Malet Calvo, 2023; Sciuva, 2025b). These policies tend to be considered either as complementing those aimed at attracting tourists or as substitutive, and even as a remedy to over-tourism (Brollo & Celata, 2023).

In terms of market structure, while the short-term segment is dominated by a substantial duopoly (Airbnb and Booking), the mid-term segment is (still) characterized by a large number of players, as we will see, including both longer-term and short-term rental platforms. By leveraging specific digital technologies, property managers can therefore shift their housing assets across multiple platforms and rental durations to minimize vacancies and maximize returns (Dagkouli-Kyriakoglou et al., 2022; Gil et al., 2023).

Moreover, this specific segment provides a fertile ground for experimenting with the extension of platform capitalism logics across the entire real estate and rental market, encompassing digital automation, transactions and payments management, property inspection, mass data collection and processing, tenant profiling and filtering, poly-platform rentierism and more (Ferreri & Sanyal, 2022; Fields, 2022; Fields & Rogers, 2021; Gil et al., 2023; Shaw, 2020). As the emerging research in this area shows, those innovations not only possess enormous disruptive potential. They also risk having profound exclusionary effects for the most vulnerable, less profitable and more stigmatized tenants in favor of temporary stayers who enjoy more privileged economic conditions, thereby contributing to both traditional and new forms of displacement.

Although the relevance of these dynamics is clear, and the scale of the phenomenon is substantial, there is still a broad lack of understanding about this sub-market and its implications, and the topic is largely absent from most urban policy agendas.

Mapping mid-term rental platforms

Obtaining a comprehensive overview of the main platforms operating in the mid-term rental market is challenging, as the segment is variegated, dynamic and not always clearly distinguishable from other sub-markets. We therefore analyzed many rental platforms operating in Italian cities across the short-, medium- and long-term segments, also to compare their operating models.

A useful starting point for obtaining systematic and comparable data is the search engine Erasmus Play, as it is specifically designed to aggregate and compare listings from platforms specialized in mid-term rentals (see Table 1), retaining a commission on the transactions it directs to those platforms. We scraped data from this website to extract detailed microdata on providers, accommodation types, rental prices, rental duration and geolocation (Bei & Celata, 2026). Table 1 provides an overview of these platforms operating in the three Italian cities with the highest number of listings.

Among Italian cities, Milan ranks first with approximately 20,000 listings at the end of 2025. Milan also ranks third among European cities, followed by Madrid (27,000 listings) and Barcelona (22,000). Notably, in these three cities, and also in Berlin, the number of listings on Erasmus Play exceeds the number of short-term listings advertised on Airbnb. Other Italian cities show smaller numbers, with Rome ranking second in the country with 6,300 listings in September 2025 (Table 2), rising to 7,150 by February 2026. When considering the ratio of listings to inhabitants, other cities emerge, such as Florence and Bologna, as well as smaller cities like Padua and Trento (Table 2). What those cities have in common is that they host attractive universities, highlighting the important role of student housing in the market's development (Cocola-Gant & Malet Calvo, 2023).

More strikingly, in both Milan and Rome the aggregated number of listings for mid-term rentals is approximately 50% above the number of listings on Italy's main long-term rental platform (Immobiliare.it), and 70%–75% above those found on Idealista. While these figures are not directly comparable,[1] they are significant and indicative of a marked imbalance between supply and demand across the different segments of the rental market, to the detriment of longer-term tenancy.

Table 2 also reports the proportion of entire apartments within the total supply, as these should be distinguished from room rentals and have a more significant impact on housing availability and affordability.

In terms of clientele, many mid-term rental platforms were initially targeted at students, but soon diversified (see Table 1). An interesting case is Uniplaces (Cocola-Gant & Malet Calvo, 2023). Founded in Lisbon in 2013 alongside the launch of a city branding strategy aimed at international

Table 1. Platforms specialized in mid-term rentals in Florence, Milan and Rome, June 2025 to January 2026.

Platform	Main declared target	Average listings	Accommodation type	Rental duration	Average monthly price: Apartment	Average monthly price: Private room
Erasmus play (aggregator)	International students, interns, young professionals	26,944	Apartments (50%) Private rooms (48%) Shared rooms (2%)	Mid-term, occasionally long-term (7%)	€2,040	€732
Spotahome	Students, young professionals, expats, temporary stayers	9,111	Private rooms (53%) Apartments (47%)	Mid-term, occasionally long-term (3%)	€1,700	€682
HousingAnywhere	International students, young professionals, expats	8,372	Apartments (58%) Private rooms (37%) Shared rooms (5%)	Mid-term, occasionally long-term (5%)	€2,222	€751
Spacest	Managers, professionals, college students, digital nomads	5,723	Apartments (57%) Private rooms (43%)	Mid-term, occasionally long-term (7%)	€2,269	€739
RoomYourNest	Students, young professionals	4,051	Apartments (48%) Private rooms (26%) Shared rooms (26%)	Mid-term	NA	NA
Uniplaces	Students, young professionals, digital nomads, expats	2,015	Private rooms (54%) Apartments (46%)	Mid-term, occasionally long-term (2%)	€1,875	€718
Joivy	Students, young professionals, digital nomads	866	Private rooms	Long-term (85%), mid-term (15%)	–	€853
Inlife	Students, professionals	650	Private rooms (94%) Apartments (6%)	Mid-term	€2,160	€764
Reboutique	International students	111	Private rooms (91%) Shared rooms (7%) Apartments (2%)	Mid-term	–	€928
HomeStay	Tourists, students, interns, gap-year travelers	51	Private rooms (93%) Shared rooms (7%)	Mid-term (79%) and short-term	–	€1,418
Flatio	Digital nomads, young professionals, people relocating for work, students, travelers	24	Apartments (78%) Private rooms (22%)	Mid-term (46%) and short-term	€2,308	€529
Casita	Students	10	Private rooms	Mid-term, occasionally long-term (4%)	–	€1,091
CRM	Students	5	Apartments	Mid-term	€1,068	–
Coliving	Professionals, remote workers, digital nomads, students	3	Private rooms (80%) Shared rooms (20%)	Mid-term	–	€1,727
Roomlala	People searching for a room rental	3	Private rooms	Short-term (57%), mid-term (43%)	–	€1,903

Source: Erasmus Play, platforms' websites.

students, it soon attracted the interest of investors connected to Airbnb (including a former Airbnb vice president recruited as a manager) and real estate platforms (Zoopla, UK). By emulating the Airbnb model, the platform adopted a radically innovative approach to the intermediation between supply and demand of rentals for international and Erasmus students, which had previously relied on social networks. It subsequently grew rapidly and began targeting a broader range of customers, namely "students, interns, young professionals, digital nomads, families or just travelers in general," as the platform declares.

In Italy, a prime example is Uniaffitti.it, founded in 2004 as a simple website for student rental listings. It ultimately merged with RoomMate, a mobile app designed to optimize students' search for housing, and evolved into the full-fledged rental platform RentYourNest, which targets a broader tenant base.

Table 2. Mid-term rentals in Italian cities: listings on the main dedicated platforms, and registered contracts.

	Listings on mid-term rental platforms, September 2025			Mid-term and student rentals registered contracts, 2024		Listings/registered contracts ratio (%)	
	Total listings	Entire apartments (%)	Listings per 10,000 residents	Total contracts	Entire apartments (%)	Total listings	Entire apartments
Milan	19,749	49.5%	144.6	44,770	55.3%	44.1%	39.4%
Rome	6,300	42.1%	22.9	43,072	35.3%	14.6%	17.4%
Florence	3,631	67.8%	100.2	6,961	59.4%	52.2%	59.5%
Bologna	2,606	69.5%	66.7	8,218	35.8%	31.7%	61.6%
Turin	2,589	39.9%	30.2	20,422	57.1%	12.7%	8.9%
Padua	1,438	7.1%	69.2	8,730	32.3%	16.5%	3.6%
Trento	518	4.4%	43.6	5,297	28.2%	9.8%	1.5%
Venice	361	34.9%	14.5	7,248	56.4%	5.0%	3.1%
Naples	333	49.3%	3.7	8,121	38.3%	4.1%	5.3%
Genoa	267	72.4%	4.7	15,210	58.7%	1.8%	2.2%
Cagliari	217	6.9%	14.8	7,527	25.9%	2.9%	0.8%
Palermo	206	79.9%	3.3	8,349	40.9%	2.5%	4.8%
Verona	144	29.9%	5.6	6,090	43.1%	2.4%	1.6%
Bari	136	22.4%	4.3	10,424	29.5%	1.3%	1.0%
Total	*38,495*	*47.9%*	*42.2*	*200,439*	*45.0%*	*19.2%*	*20.6%*

Source: Erasmus Play, Italian Real Estate Market Observatory (OMI), Istat.

Among the 15 active rental platforms with listings aggregated in Italy by Erasmus Play—whose declared target is primarily student accommodation—only a few minor ones are exclusively aimed at students. Nevertheless, all platforms include (international) students among their key target groups, and many of them claim to offer a solution for "young professionals." Other frequent target groups are "digital nomads" and "expats" (Table 1).

In terms of accommodation types, all leading players offer both entire apartments and rooms, with an approximately equal distribution (Table 1). Rooms are very rarely shared or offered within families, and are predominantly private rooms (97%). Minor players tend instead to specialize (almost) exclusively in renting either entire apartments or rooms (Table 1).

Regarding their origin, the main platforms operating today were founded over several periods, particularly in 2013–2015 and 2019–2022. What is revealing is their place of origin and headquarter location, which is almost always Europe, and often southern-western Europe (Figure 1). This is striking given that digital services operating in the continent are often not headquartered in Europe, or Southern Europe in particular. Southern Europe's prominence in the digitalization of housing reflects the continued significance of the real estate sector in the region: a sort of rentierism 4.0 which innovates while simultaneously reinforcing a problematic specialization in nonproductive industries. This geography is also probably related to the attractiveness of the area for the primary clientele of these platforms, such as lifestyle migrants and digital nomads (Díaz-Parra et al., 2026; Orozco-Martínez & Gil Alonso, 2024). Nevertheless, most of these platforms maintain a broad European and sometimes global coverage, seeking rapid expansion in the most attractive markets.

One of the notable characteristics of this segment is its dynamism, as exemplified by the case of DoveVivo. Founded in Milan in 2007 under the name Reale Gest, with the idea of "transforming the experience—and the critical issues—of renting into a business opportunity by changing its rules," in 2018 it acquired House4you, a co-living company founded in Alicante in 2003 with the slogan "responding to the lack of quality temporary rentals available on the market." As DoveVivo's CEO declared, the aim was "to position ourselves as an aggregator in a fragmented market with enormous growth potential." In 2019, the company acquired Place4you which is based in Milan and primarily focused on student rentals, as well as Florentine company Rtmliving which specializes in mid-term rentals and combines "the autonomy and comfort of micro-living with the sharing of common areas within structures designed to create community." In 2022, DoveVivo merged with Altido, and in 2023 with the French company Chez Nestor, forming Joivy. The aim was to "foster the geographical and

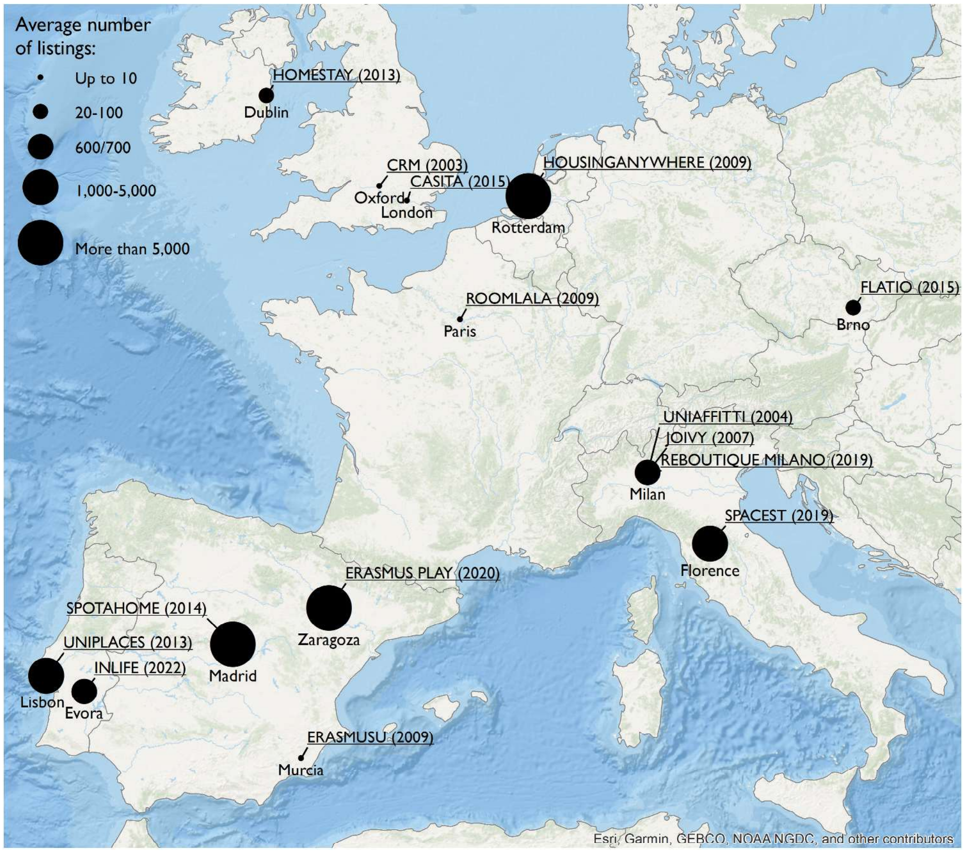

Figure 1. Origin and weight of mid-term rental platforms operating in Florence, Milan and Rome, 2025–2026. *Source*: Erasmus Play and companies' websites. The map excludes only two minor platforms, COLIVING and YUGO, originating in Palo Alto and Denver, US.

commercial expansion" of these companies, to serve not only students but also "young professionals and digital nomads," and offering different solutions including co-living and microliving. Its listings are now predominantly for long-term rentals (Table 1), likely reflecting an attempt to extend the logics described above to this sub-market as well. What is also distinctive about Joivy is that it does not merely intermediate between supply and demand by hosting listings. It directly manages 4,000 "assets," namely housing units but sometimes entire buildings, on behalf of 2,000 property owners, functioning simultaneously as an aggregator, booking platform and property manager.

Such hybridity is also characteristic of a related emerging market: purpose-built student accommodation (Holton & Mouat, 2021; Hubbard, 2009; Sage et al., 2013). The model was created in Amsterdam in 2006 by "The Student Hotel" (recently renamed "The Social Hub": TSH), but Italy is also the hub of various similar companies such as Camplus and CampusX, which manage 10,000–11,000 and 4,000–5,000 accommodation units respectively, in several Italian (and Spanish) cities (Cenere et al., 2023). Their core business is to directly manage the accommodation units they own and often build *ex novo*. However, on their websites, they also present themselves as booking platforms in the cities where they operate, accommodating different needs (from daily rentals to longer ones) and target groups. This encompasses not only students (as their names suggest) but also "young professionals," "travelers," "digital nomads" and even tourists, or "anyone with a student spirit—curious, open, free, adventurous," as TSH declares. Camplus is also an illustrative example of market evolution, having originated in the 1980s as a student cooperative.

The dynamism and attractiveness of the sub-market is also reflected by the interest shown by companies operating in other segments. A prominent example is Airbnb, which introduced the "longer-term" option in 2020 also in response to the collapse of tourism caused by the pandemic. In both Italian and major European cities, Airbnb's longer-term listings account for approximately 15% of the platform's inventory, effectively making the platform one of the leading actors in the mid-term rental market as well. Almost half of Airbnb "longer-term" listings are managed by property managers, such as Kamchu (Rome) and Novecento Case (Milan), some of which operate exclusively in this segment and manage dozens of fully furnished properties.

Mid-term rentals and the digitalization of housing markets

Major companies traditionally operating in the residential market, such as Idealista, are also increasingly advertising mid-term rentals and strengthening their position in this growing and profitable segment. Those companies, however, primarily list their offers online and do not fully leverage the advantages of platformization, which as Spacest declares have the potential "to make the rental process completely digital."[2]

As already mentioned, a key aspect of digitalization and of the "Airbnb model" is the possibility to book accommodation instantly without the need to physically visit the property, navigate complicated selection processes or interact directly with the property owner or manager (similarly to Airbnb, mid-term platforms adopt strict methods to avoid even the possibility of such direct contact prior to the transaction). The use of map interfaces is also widespread, similarly to Airbnb but also traditional housing intermediation websites. Some platforms (for example, Spotahome) provide virtual video tours of the accommodation, or in any case enable detailed remote evaluations through photos, structured information and floor plans. While floor plans and, more recently, video tours are occasionally available on traditional platforms such as Idealista, these do not allow immediate bookings.

For such digitalization to function effectively, platforms must not only simplify and secure transactions for both landlords and tenants, but also offer additional verification services aimed at reducing the uncertainty inherent in longer-term rental contracts. Many of them employ dedicated staff to personally verify both the property and the landlord, to assure customers that the offer meets some minimum standards and the listing is consistent with the actual dwelling, and to prevent fraudulent practices. Unlike platforms such as Airbnb, on the other hand, review and rating systems do not appear to play a central role, although listings sometimes report the number of "satisfied tenants" or similar. The ranking logic of listings is opaque, but the same applies to Airbnb and many other platforms. Another distinguishing feature is the possibility to improve the visibility of the listing through paid promotions.

Importantly, some mid-term rental platforms have adopted forms of user certification modeled on Airbnb's "Superhost" label (Roelofsen & Minca, 2018). Such profiling, however, is here primarily directed at certifying guests rather than hosts, that is, tenants as opposed to property owners or managers. Spotahome, for example, introduced the "Top Tenant" certification, which evaluates users based on their behavior in previous rentals and the completeness of their personal profile, including disclosures regarding income sources and even solvency information.

These tools are part of the above-mentioned experimentation with digitalization and datafication aimed at securing housing transactions, increasing trust and minimizing risks for property owners, while avoiding the costs, complexity and uncertainty associated with direct evaluation. As the literature on the topic shows, the risk is that users deemed "at risk" may be automatically excluded —a phenomenon known as algorithmic red-lining (Ferreri & Sanyal, 2022). Digital discrimination may also merely arise from the requirement to display a profile with photos and other personal information, as evidenced by the case of Airbnb (Cheng & Foley, 2019).

The content of users' profiles varies depending on the platform. As noted, Airbnb primarily target its hosts, who are encouraged to display their photos, personal data, previous reviews, average ratings, response rate and time and the "Superhost" certification. Idealista also offers something similar to tenants: they can share photos, personal and contractual data, information about the household composition, the reasons and timing of the move and economic data such as salary. Mid-term rental platforms such as Spotahome occupy a somewhat intermediate position: they replicate Airbnb's infrastructure and interface, while encouraging tenants to disclose personal information, the reasons for relocating and sensitive economic and financial details, as mentioned above.

Platforms operating in this market segment therefore stand out for their greater internalization of verification processes, and for relying less on users' reviews and ratings, in favor of more direct, less "lean" mechanisms for managing and verifying listings. This is in line with the tendency to develop hybrid, online/offline, platform models. On the other hand, they are also trialing more direct and intrusive tenant profiling practices, as well as other means to assure property owners and secure housing transactions and rental payments. Consequently, they can charge higher intermediation fees compared with platforms operating in other segments. The standard fee in Uniplaces in 2025, for example, is €700, regardless of the rental price and duration.

Implications for housing, cities and neighborhoods

The platformization of mid-term rentals inevitably affects this particular segment and, consequently, the cities and neighborhoods where it is concentrated, through a variety of direct and indirect mechanisms.

A first key issue in this regard is the market's scale. In Italy, as noted in the introduction, rentals that are neither short-term (below 30 days) nor long-term (minimum 3 years) are regulated by specific tenancy contracts. The first and main mid-term contract is defined "for transitory use," with a duration of 1 to 18 months. The second, which is less common but growing more rapidly (Figure 2), concerns student rentals, with durations between 6 and 36 months. Both types of contracts have experienced substantial growth in recent years, while the number of long-term contracts has remained stable and has begun declining since 2019 (Figure 2). The two types of mid-term contracts in 2024, in Italian provincial capitals, accounted for nearly half (48%) of total rental contracts that are registered by the Italian Revenue Agency (the public authority responsible for tax collection in Italy).

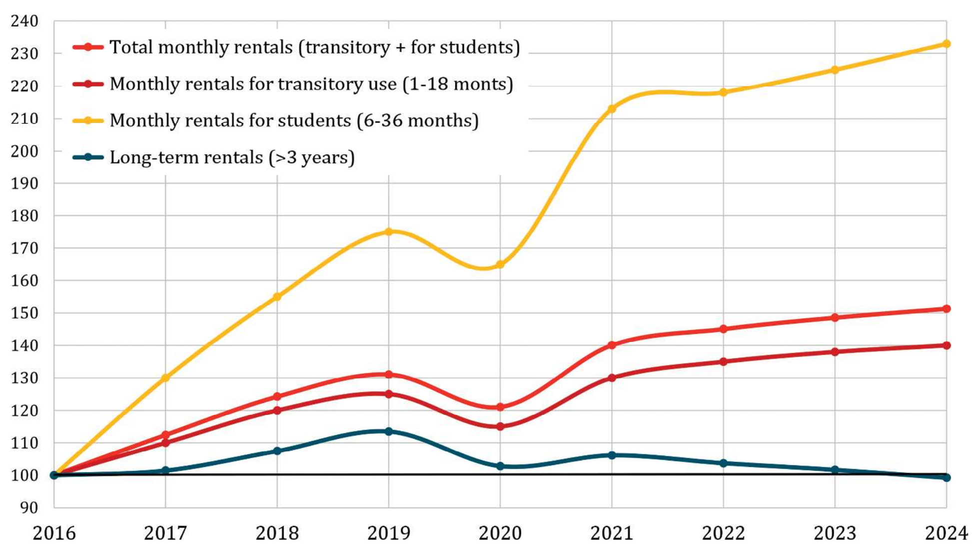

Figure 2. Registered rental contracts in Italy for entire apartments, per type, 2016–2024 (Base: 2016 = 100). *Source*: Italian Real Estate Market Observatory (OMI), 2025.

This boom is readily explicable. Demand for mid-term rentals is increasing and on average comprises higher-spending, less demanding and lower-risk tenants compared with the average tenant—in countries like Italy, tenants are often low-income. The shorter duration of contracts, moreover, allows property owners to adjust conditions and prices more frequently, which is especially advantageous in the context of rising prices.

A second key issue concerns the extent to which this market is mediated by dedicated platforms. To approximate such figure, Table 2 reports the ratio between the number of listings on dedicated platforms and the number of registered mid-term rental contracts in 2024 in Italian cities. These numbers are not directly comparable, as they compare online listings with registered contracts, but they indicate the fact that in cities with the highest numbers of mid-term rentals—particularly in Milan, Florence and Bologna—a substantial share of this supply is channeled through specialized platforms.

The most crucial comparison concerns rental prices. Data on all registered contracts in 2024 (OMI [Osservatorio del Mercato Immobiliare], 2025) indicate that in Italy the average price for a student rental is 13% higher than a free market long-term rental, and that of mid-term "transitory use" leases is 42% higher. In Milan and Rome, the monthly price of a transitory contract in 2024 was €1,100 and €1,130 respectively (OMI, 2025). By contrast, on mid-term rental platforms, the average monthly price for an apartment is approximately twice as high, reaching €2,010 in Milan and €2,230 in Rome, excluding platform fees. These figures are also not perfectly comparable, but certainly indicate a huge price gap. This can be attributed to several factors. Platform listings predominantly consist of furnished and well-equipped accommodation, similar to the short-term rental market and unlike many long-term and student rentals. Prices are consequently higher. The investments required to meet those standards, however, are relatively modest and may even be negligible if the property is already configured for a transitory clientele, particularly in the short-term market, which is often the case.

The clientele served by these platforms is consequently predominantly high-spending, and often transnational. This is not only because foreign temporary residents typically have higher budgets, but also because having the convenience of a fully digital rental process, including having listings available in multiple languages, is crucial for bookings from abroad. Temporary stayers or students with lower budgets, in contrast, frequently rely on these platforms—including Airbnb—only during the initial phase of their stay. Once settled, they tend to shift toward more informal and direct channels to find accommodation they can afford.

Such targeting is not necessarily the result of a deliberate business strategy, since platforms can benefit from serving a wider range of customers, and many explicitly state that they are primarily aimed at students. Similar to the conversion of housing units into tourist accommodation, platform mediation inevitably generates a substantial price gap, also in this segment, which results in the exclusion of lower-income tenants. This is probably one of the reasons behind the recent and widespread concerns in Italy regarding the reduced availability and escalating costs of rental housing for nonresident students.

Finally, it is essential to examine where in the city these dynamics concentrate the most, to assess whether the price gap identified above also generates substantial rent gaps, namely its neighborhood effects. As noted earlier, previous research suggests that the distribution of mid-term rentals and temporary inhabitants overlaps with that of short-term rentals in the most central and attractive neighborhoods while also dispersing into nearby, well-connected, university-oriented areas (Brollo & Celata, 2023; Sciuva, 2025b). These areas are less appealing to tourists, but housing and rental prices are lower, meaning that the resulting rent gap may be particularly pronounced.

A comprehensive exploration of these spatial dynamics is beyond the scope of this paper, and will be addressed in a forthcoming study. The next figures illustrate only the distribution of mid-term rental listings in Rome and Milan, in terms of absolute density (Figures 3A and 4A), and relative density with respect to short-term rentals: namely the density of the difference between the number of

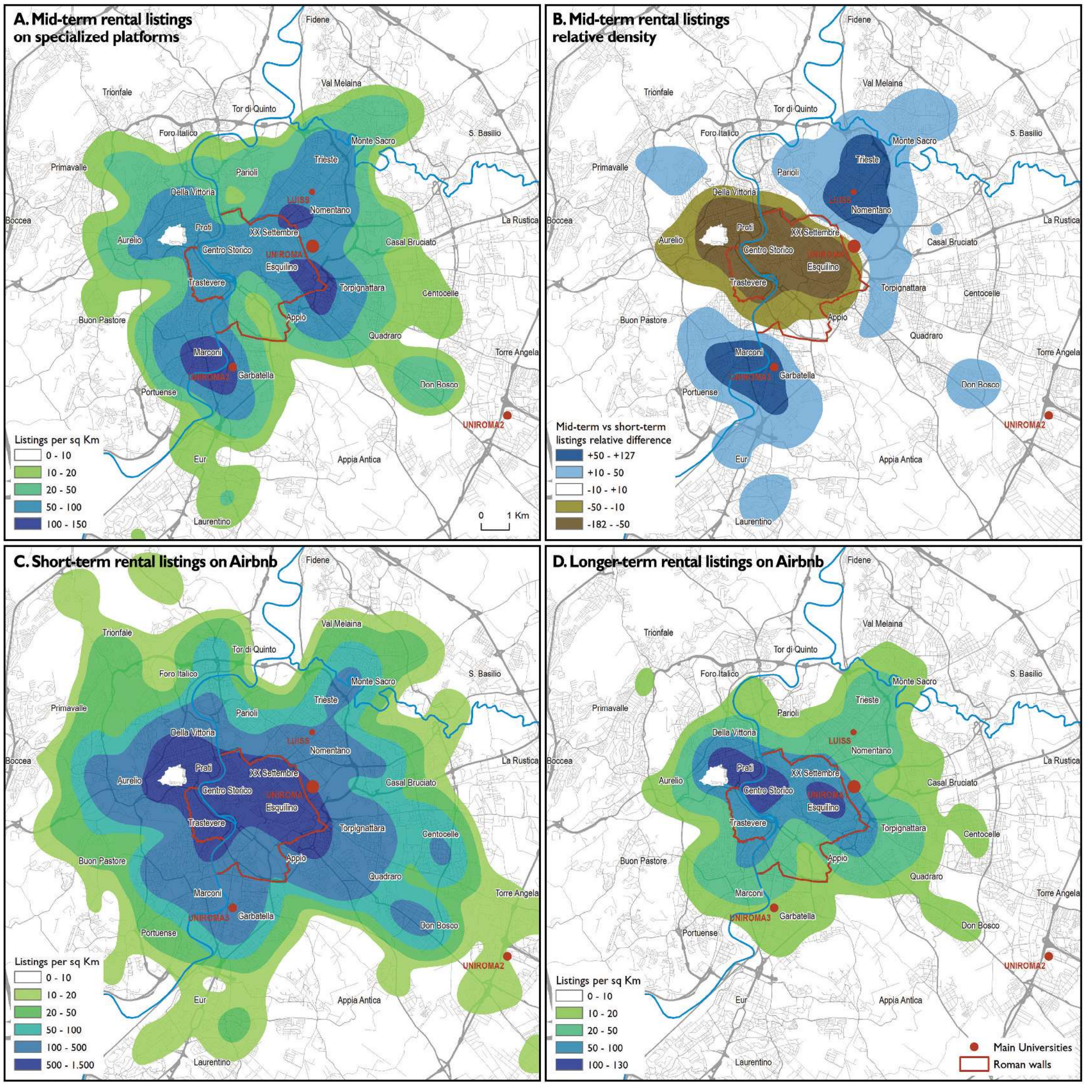

Figure 3. Density and relative density* of mid-term rental listings on Erasmus Play and Airbnb in Rome, September 2025. *Source*: Erasmus Play, InsideAirbnb. Kernel density, radius: 1,500 meters. *Absolute deviation from the expected number of listings in the case of a spatial distribution analogous to that of short-term rental listings on Airbnb.

listings on Erasmus Play and the expected number of those listings if their distribution mirrored that of Airbnb short-term rentals (Figures 3B and 4B). The resulting patterns are consistent with those discussed above. In both cities, mid-term rentals mediated by dedicated platforms are dispersed throughout the whole urban core, but their highest concentrations are perimetral to the historic center, in semi-central, well-connected, less touristified areas, particularly around universities.[3]

Short-term rental listings in the two cities (Figures 3C and 4C) are also increasingly dispersed across the urban fabric, but remain predominantly concentrated in the historic center. The approximately 4,000 "longer-term" rentals listed on Airbnb in both cities, in Milan have a similar distribution to that of mid-term rentals on dedicated platforms (Figure 4D). Conversely, in Rome their distribution is similar to that of short-term listings (Figure 3D): this suggests that these units are likely rented both on a daily and monthly basis, or that they were previously short-term rentals.

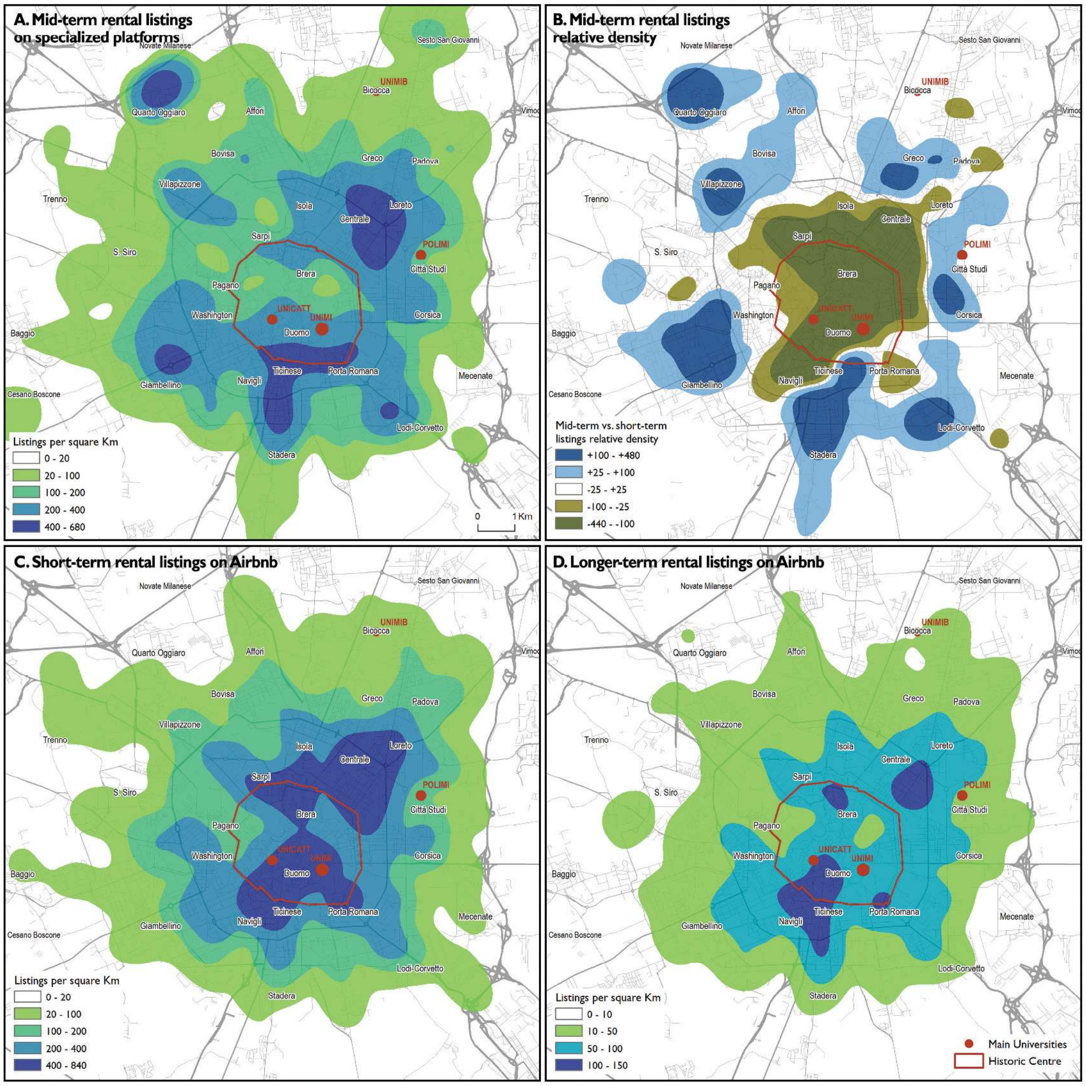

Figure 4. Density and relative density* of mid-term rental listings on Erasmus Play and Airbnb in Milan, September 2025. *Source*: Erasmus Play, InsideAirbnb. Kernel density, radius: 1,500 meters. *Absolute deviation from the expected number of listings in the case of a spatial distribution analogous to that of short-term rental listings on Airbnb.

The zonal distribution of mid-term rental listings on dedicated platforms in Rome also shows a strong and highly significant correlation with the distribution of all registered mid-term rental contracts ($r = 0.78$, $p < .01$). This indicates that the platform-mediated segment exhibits a spatial pattern similar to that of the overall mid-term rental market. This distribution is also correlated with that of long-term rental contracts ($r = 0.66$, $p < .01$), because residential rentals are also concentrated in the same central or semi-central areas of the city, while homeownership dominates in more peripheral zones.

In sum, platform-mediated mid-term rentals risk withdrawing a substantial share of both long-term and traditional mid-term rental supply from lower-income tenants, contributing to their displacement toward more peripheral areas, and potentially fueling broader rental market inflation. These effects are particularly acute in neighborhoods where the phenomenon is most concentrated and in cities where numbers are already high, such as Milan. In Rome, mid-term listings are five to six times less numerous than Airbnb listings, and therefore less significant. This is also partly due to the smaller share of this segment which is mediated by dedicated platforms in Rome (Table 2). In any case, mid-term rentals may generate exclusionary and extractive dynamics that are similar and therefore combined, and that both overlap and extend beyond that of short-term ones. These dynamics resemble, on the one hand, tourism-led gentrification and, on the other, forms of transnational gentrification (Cocola-Gant & Lopez-Gay, 2020; Hayes & Zaban, 2020; Sigler & Wachsmuth, 2020), and have been described as “gentrification without substitution” or “gentrification without redevelopment” (Wachsmuth & Weisler, 2018), insofar as they lead to the displacement of permanent residents without necessarily leading to their social replacement, or any substantial physical redevelopment or revitalization of the area.

Regulatory challenges

The regulation of mid-term rentals in Italy is likewise distinctive, as mentioned in the introduction. The main mid-term contract, “for transitory use,” was introduced by Law no. 431 in 1998 as a derogation from standard residential tenancy contracts, which must have a minimum duration of four years, or three years in cases where the rent is set below market levels. Transitory contracts can be concluded only when either the landlord or the tenant can formally document circumstances justifying a temporary housing need, for example where an employer declares that an employee has temporarily relocated, or in case of a university program enrollment. Since residence in another municipality is generally considered the main evidence of such transitory need, individuals registered as residents in the city are de facto excluded from this market segment, unless they can demonstrate specific temporary circumstances (for example, renovations to their primary dwelling). Otherwise, landlords will be willingly misusing this contractual regime: this occurrence is not uncommon, and contributing to a significant informalization of the rental market.

Although the rationale of the law is also to ensure that longer-term residents have access to longer-term rentals, its implications are problematic. On the one hand, permanent residents are de facto excluded from a growing share of the rental market. On the other hand, temporary inhabitants are themselves encouraged to remain in a state of “permanent temporariness” and housing precarity (Brollo, 2024). Even when their stay extends beyond a few months, they are effectively discouraged from formalizing their status as residents, and are consequently excluded from the rights and benefits associated with it, such as access to a local family doctor or reduced fees for public services. As a result, they may develop a diminished sense of belonging to the city, and perceive limited opportunities for stabilization and long-term settlement. This condition is further reinforced by the need to periodically renew rental contracts under terms dictated by their landlords and prevailing market conditions.

Within this framework, the platformization of the mid-term rental market generates additional exclusionary pressures, while simultaneously making this segment more attractive, profitable and secure for property owners and real estate actors. A substantial share of housing supply runs the risk of being diverted away from both long-term residents and lower-spending temporary populations, such as precarious nonresident workers or students.

The policy options are equally problematic and, in several respects, more complex than in the case of short-term rentals. One possible approach would be to liberalize the market, thereby granting residents full and formal access to mid-term rental contracts. However, such a reform would likely further expand this form of contract and contribute to making tenancy and housing conditions more precarious. A second option would consist of imposing stricter limitations on the option for property owners to rent on a monthly basis, similarly to the regulatory measures adopted by many cities for short-term rentals (Bei & Celata, 2023). Yet, such restrictions risk aggravating the exclusionary effects for lower-spending temporary inhabitants. A third option would involve introducing compulsory rent caps for mid-term rentals. This is indeed the case in the main Italian cities, where both transitory and student rental contracts are regulated through predetermined price ceilings (Brollo, 2024). This measure is clearly ineffective, as actual prices are often far above such ceilings, and requires careful calibration in any case. The cap should be set low enough to ensure affordability for lower-income tenants, and to reduce the attractiveness of this segment for property owners, but not so low as to incentivize them to shift toward short-term rentals, which in Italy remain largely unregulated, or to leave the rental market altogether, which is already residual and structurally insufficient. A more radical alternative would be to eliminate monthly rental contracts altogether. While this would oblige property owners to opt for longer-term leases, it would not prevent tenants from terminating contracts earlier.

Other interventions may include revising the taxation framework. Property taxation, for example, does not differentiate in Italy according to how the dwelling is actually used. Rental income in Italy is also subject to a flat and relatively low tax regime (21%), regardless of the form or duration of tenancy (with the partial exception of a recent increase in taxation for short-term rentals owned by multiple-property landlords). In this respect, the main inconsistency in the Italian regulation of mid-term rentals is that, insofar as they are subject to price ceilings, they benefit from a reduced tax rate of only 10% on rental income, providing an additional and unjustifiable incentive.

Ultimately, the case of mid-term rentals illustrates that regulations cannot be effective if they are applied separately to individual market segments. What is needed instead is a comprehensive reform of housing regulation and taxation.

Conclusions

In a context of rising rental prices and growing demand for temporary accommodation, mid-term rentals are expanding rapidly in many Italian cities, as well as in comparable urban contexts. Compared to short-term rentals, they are also very profitable and less risky than long-term leases, while entailing lower management costs and fewer legal constraints. Indeed, they occupy an intermediary and strategic position between tourism accommodation, which is now subject to increasingly stricter regulation, and residential tenancies, which risk becoming even more residual and unaffordable.

The article problematized the role of specialized platforms in making mid-term rentals even more attractive, sustaining their spread while disrupting the market. These digital intermediaries reduce informational asymmetries between property owners and tenants, and eliminate the need for direct interaction and reciprocal evaluation—which is particularly significant for a transnational clientele. By fostering a perception of procedural safety through translation tools, secure payment systems and verification mechanisms, they grant access to a global pool of potential tenants and adjust the scale at which local housing markets operate.

In doing so, mid-term rental platforms replicate several operational mechanisms characteristic of tourism booking platforms, while developing distinctive features. The resulting model is hybrid, spanning the spectrum between the purely "lean" and asset-light intermediation typical of tourism booking platforms on the one hand, and the internalized and proprietary business model exemplified by purpose-built student accommodation on the other hand. Digital intermediaries that were often initially designed to provide solutions for nonresident students have increasingly come to serve a transnational clientele of high-spending mobile professionals and lifestyle migrants, enabling both property owners and intermediary platforms to capture substantial surplus profits. Compliance with those standards typically requires limited investments in property upgrades, yet it can generate significant price gaps and high returns, as rental prices on these platforms may be more than twice as high as comparable non-platform-mediated mid-term rentals.

In cities and zones within those cities where this segment is growing more rapidly, and numbers are already substantial, the phenomenon may also contribute to significant neighborhood change. Potential effects resemble those associated with short-term rentals, but extend also beyond highly touristified districts into less gentrified residential areas. Although less visible than that of tourists, the influx of high-spending temporary populations can play a substantial role in reshaping housing demand and access, thereby accelerating the displacement of lower-income residents. The result is a subtle yet persistent reconfiguration of urban geographies and social composition, as temporary uses of housing become increasingly embedded in the local economy and urban fabric.

Despite its relevance, this phenomenon remains largely absent from most urban policy agendas, which often actively promote the attraction of "desirable" temporary residents, such as high-spending digital nomads or international students. Moreover, housing regulations and legal frameworks tend to focus predominantly on long-term tenancies, or on the highly contested short-term rental segment, thereby leaving mid-term rentals in a regulatory gray area. In Italy, the regulatory framework is particularly distinctive. Monthly contracts were originally conceived to address specific, temporary and exceptional needs. Today, this form of contract is increasingly employed for purposes that extend well beyond, and in many respects contradict, its original intent. The widespread use of monthly contracts firstly contributes to housing and residentiality becoming growingly precarious, exposing tenants to heightened insecurity, rising rental costs and repeated renegotiations of contractual terms. Secondly, the expansion of this segment removes an additional share of rental supply from the stock available to more vulnerable tenants, including nonresident students and lower-income temporary inhabitants.

These tensions are linked to broader processes entailing the platformization of housing markets and cities, which now extend beyond the tourism accommodation sector. In this regard, the mid-term rental market serves to both magnify and drive contemporary urban transformations. It illustrates how increased mobility, sustained digitalization, rentier capitalism and the housing crisis, intersect to produce new spatial orders and novel forms of competition over urban space.

Further research is needed to build upon the exploratory evidence presented in this article, and in the emerging scholarly debate on the topic. Extending the analysis to other contexts may corroborate what we observe in Italian cities, or may reveal additional, different findings. The exclusionary and gentrification dynamics that we identified indirectly should be addressed by more direct, comparative or case-study based assessments. Data on online listings is detailed and effective, but obviously partial, and should be complemented with equally granular data on rental contracts. With regard to how platformization contributes to the housing crisis and the implications for more effective regulation, the case shows that short-term rentals clearly represent only part of the picture. Both research and policy debates should be grounded in a more comprehensive understanding of diverse nonresidential housing uses, how those uses interrelate and complement each other, and their implications for the right to the city.

Notes

1. Listings for mid-term rentals, similarly to those for short-term ones, also remain visible on the platforms when they are let on a temporary basis, together with a calendar of their availability. On the contrary, listings on websites like Immobiliare.it and Idealista are normally published when the apartment is vacant, and removed after they are rented.
2. https://spacest.com/it/about-us.
3. In the case of Milan, the peripheral hotspot identified in the Quarto Oggiaro neighborhood, in the northern part of the city (Figures 4A and 4B), corresponds to the CampusX Milan student residence. Currently under construction, the facility will provide approximately 800 rooms available for monthly rental that are apparently already being advertised on Spotahome. Similar residences are proliferating in many cities, including peripheral and suburban areas; however, they are rarely listed on the mid-term rental platforms examined in this study (this is the only case we identified in both Milan and Rome). Nevertheless, this case illustrates the heterogeneity of the mid-term rental market discussed in Section 3, which encompasses a wide range of accommodation types: from the fragmented supply of privately owned dwellings mapped in this study, to large-scale investments in purpose-built accommodation.

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