Short-Term Rentals in Rural Areas: Sustainable Tourism Perspectives Artificial within the SYSTOUR Project

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Abstract. The rise of short-term rentals, fueled by digital platforms, is changing tourism trends in rural areas. These changes have implications for rural development in the transition towards more sustainable and place-based tourism models. This study aims to explore how short-term rentals contribute to sustainable tourism in six rural areas across Europe, as part of the SYSTOUR project. The research uses a mixed-method approach that combines both quantitative and qualitative analyses. A structured database of short-term rental listings was developed using Airbnb data, including spatial, economic, and service-related factors. Descriptive statistics and spatial analysis were supplemented by participatory workshops with local stakeholders. These workshops were guided by the Systemic Policies Model Canvas to examine governance dynamics and future scenarios. The results revealed a polycentric distribution of short-term rentals, with clusters located around important cultural and natural sites. A dual market structure emerged: Southern and Western regions experience significant seasonal price changes, while Central and Northern regions have more stable pricing patterns. The analysis also highlighted how accessibility and local appeal impact pricing and distribution, along with common governance issues. Short-term rentals can aid in rural regeneration by redistributing tourism flows and increasing local value creation. However, their success relies on coordinated, place-based governance strategies that combine data-driven insights with stakeholder involvement.

Keywords: Short-term rental · Sustainable Tourism · Rural Areas

1 Introduction

In recent decades, tourism has experienced persistent growth and diversification, becoming a key driver of economic development while simultaneously generating significant socio-territorial pressures [1]. In response to the negative externalities associated with mass tourism, such as spatial concentration, environmental degradation, and social conflict, academic research and policy agendas have increasingly called for more sustainable,

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inclusive, and territorially balanced tourism models. Within this transition, rural areas have gained attention as potential spaces for redistributing tourist flows and fostering place-based development. Rural areas can be defined as non-urbanised geographical areas, such as inland regions, the countryside, coastal landscapes, or mountainous areas, characterised by small- and medium-sized settlements and low population density [2]. In this context, the concept of rural tourism emerges, which the World Tourism Organisation (UNWTO) defines as a type of tourism activity in which the visitor's experience is connected to a wide range of experiences, generally related to nature, agriculture, and a simple and traditional lifestyle [1–3]. The characteristic elements of this type of tourism are closely linked to the territory [4, 5], the local economy [6], and the community [7].

At the same time, the rapid diffusion of digital platforms has profoundly reshaped the hospitality sector in rural areas [8]. Short-term rentals, mediated by online platforms, have expanded well beyond urban contexts, increasingly affecting rural and peripheral areas [9]. Despite their growing relevance, the role of short-term rentals in rural tourism systems remains insufficiently explored, particularly in terms of their interaction with local socio-economic structures [10], governance capacity [11, 12], and sustainability objectives [13].

Against this background, this paper aims to analyse the short-term rental market in six European rural areas [14, 15], with particular attention to the impact of digital platforms on the transformation of local hospitality systems and to the related pricing dynamics. Adopting a systemic approach, the research combines past experiences [16, 17], recent theoretical contributions, co-design experiences and short-term rental market data analysis to examine how emerging platform-mediated accommodation influences social, economic, and territorial tourism dynamics in rural contexts. The study is characterised by a multiscalar perspective and integrates quantitative and qualitative analysis tools, including descriptive and spatial statistical analysis, and visual design methods, in order to address the complexity of contemporary rural tourism systems [18].

The study is developed within the framework of the European project SYSTOUR (Systemic approach for sustainable tourism strategies in rural areas) [19] and focuses on six rural regions across Europe.

The research addresses the following questions:

- What are the main structural and spatial characteristics of short-term rental markets in European rural areas?
- How do short-term rentals interact with local socio-economic and territorial dynamics in rural contexts?
- How can systemic design tools support governance strategies for sustainable rural tourism development?
- How do pricing variability, seasonal demand, and territorial accessibility influence the spatial distribution and market behaviour of short-term rentals across different European rural regions?

The paper is structured as follows: Sect. 2 presents the Methodological framework and the Case Study of the present research; results are discussed in Sect. 3, which illustrates the empirical findings; and Sect. 4 reflects on the conclusion, policy implications and future research directions.

2 Materials and Methods

The following sections present the methodological framework of the research (Sect. 3.1) and the territorial context in which it is applied (Sect. 3.2). The study is grounded in a systemic perspective that integrates data-driven analysis with participatory processes, allowing for a comprehensive understanding of short-term rental dynamics in rural areas.

2.1 Methodological Framework

The methodological framework is structured as a sequence of interconnected analytical phases aimed at investigating the phenomenon of short-term rentals in rural areas.

The research combines qualitative and quantitative approaches, enabling the integration of empirical data, spatial investigation and participatory insights from local stakeholders in order to capture the multidimensional nature of tourism dynamics in rural territories. This mixed-method approach allows the study to address both the structural characteristics of the short-term rentals market and the experiential dimension of tourism practices.

The methodological path begins with the research objectives definition (Phase 1) and a focused literature review (Phase 2 – Background) aimed at identifying the main theoretical frameworks related to the topics of sustainable tourism, rural development and the diffusion of short-term rentals. Within this context, the study examines how these forms of accommodation influence tourism development in rural areas in targeted regions.

Subsequently, data collection is conducted in Phase 3: a qualitative approach based on participatory World Café workshops, is integrated by quantitative analyses involving the collection of short-term rental data from short-term platforms. In particular, a database is developed through the collection, harmonisation, and coding of real estate data related to short-term rental listings available on the selected platform in a defined time period. In the following Phase 4 (Implementation of Database and systemic policies canvas), it is necessary to define metadata and variables describing accommodation characteristics, services offered in the study area, pricing dynamics, user ratings and geographic coordinates of records. This database enables the definition of the objective and structure of the systemic policies canvas, the integration of statistical and spatial analyses in the following Phase 5 (Data processing) and supports a comparative analysis across the selected case studies in different rural contexts.

Data analysis combines qualitative and quantitative approaches. Participatory outputs are interpreted to develop future-oriented scenarios. The short-term sample from platforms is analysed using descriptive statistics, mapping, and exploratory spatial data analysis (ESDA). In parallel, the research incorporates participatory activities [20], involving local stakeholders through workshops supported by the formalisation of visual canvas models [21] (Phase 4), which facilitates collaborative reflection [22] on local tourism dynamics and contribute to the identification of innovative directions [23] for sustainable rural tourism strategies development (Fig. 1).

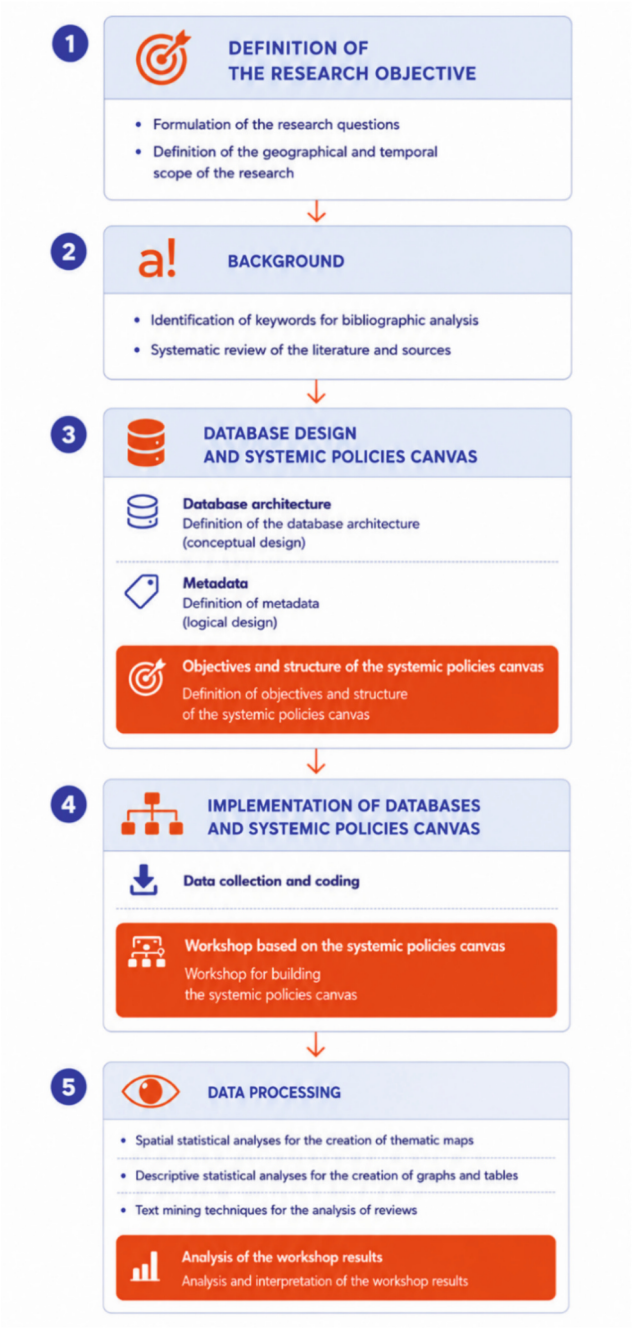

Fig. 1. Methodological framework of the present research (Elaboration of the authors on Butticè, 2025)

2.2 Case Study: The Empirical Analysis within the SYSTOUR Project and the Co-design Session with Partners and Stakeholders

This study examines six rural regions selected for the SYSTOUR project (Fig. 2). These areas provide a balanced geographical representation across Europe: Molise in Italy, Nouvelle-Aquitaine in France, Lea-Artibai in Spain, Central Ostrobothnia in Finland, Świętokrzyskie in Poland, and Hajdú-Bihar in Hungary. The regions involved in the SYSTOUR project are characterised by the presence of inland rural areas undergoing sustainable tourism transformation. These regions share common challenges, including depopulation, seasonal tourism demand, and limited accessibility, while also displaying diverse territorial identities and governance structures [24, 25]. SYSTOUR expects to support territorial policies and strategies in close dialogue with stakeholders located within the selected regions. The approach used for this research recognises the effectiveness of a deep understanding of the interconnected and interdependent elements in change and transformation processes, often grounded in data, information, and knowledge systems.



Fig. 2. Geographic location of the six rural regions (Authors' elaboration)

The phenomenon of short-term rentals in European rural areas [8–10, 18] presents itself as a complex system, shaped by a multiplicity of interrelated factors (such as regulatory, economic, infrastructural and social). To analyse its dynamics in depth, it is necessary to adopt an approach that captures these interconnections and provides

an integrated view of the territorial system. To implement this systemic perspective, the adoption of specially designed canvas models (examined in greater depth in the following sections) facilitates interaction, communication, and strategies co-creation with local stakeholders in contexts characterised by high levels of complexity.

3 Results

The following two sections present the research results. They combine insights from participants in Sect. 3.1 with a data-based analysis of short-term rental listings in Sect. 3.2. This approach explores the dynamics of short-term rentals in rural areas. This part of the study builds on the methods outlined in Sect. 2 and the research conducted in the SYSTOUR project. It shows how a systematic interpretation, based on real evidence, can help create more sustainable and context-sensitive tourism strategies. The two analytical components are closely linked. Insights from the participatory workshops helped shape the research focus. They also guided the choice of variables and the geographic area for the following data-driven analysis on short-term rental listings.

3.1 Systemic Policies Canvas

The organisation and setup of participatory workshops represented a key phase in activating co-design processes with local stakeholders and in collectively validating the analytical and design hypotheses developed. The workshop sessions followed the World Café methodology [26], a widely recognised collaborative facilitation method known to fostering mutual listening and convergence towards shared visions. The World Café can be understood as a simple yet effective dialogic tool for stimulating collective reflection, knowledge sharing, and the generation of design ideas through meaningful conversations among small groups of participants [27].

To manage the participatory session, a set of systemic policies canvas was designed to represent interactions concisely and coherently, articulated into two complementary visual formats presented as separate posters. The first canvas adopts an operational and design-oriented perspective, supporting a systematic reflection on enabling factors and barriers to the development of short-term rentals in rural areas, including infrastructural needs, regulatory constraints, and policy priorities. The second component takes a forward-looking perspective and focuses on long-term dynamics, fostering strategic visioning on future scenarios, emerging trends, and systemic transformation processes.

The workshops included project partners and local stakeholders from the six SYSTOUR regions, representing various institutional, professional, and territorial viewpoints. The application of the canvas followed a sequence of phases which allowed participants to identify critical elements, interdependencies, and emerging patterns depending on their knowledge of the study area and their backgrounds. Through facilitated discussion, the canvas fosters shared understanding and collective reflection among stakeholders [21]. The resulting outputs are then analysed to interpret systemic dynamics and to identify strategic directions for the case study. In this way, the canvas functions not only as an analytical device, but also as a tool for co-design and alternative scenario-building [22], supporting the development of sustainable [28] and context-sensitive strategies.

The collected information was then reorganised to hypothesise evolutionary scenarios. The components related to innovation, pricing, accessibility, relationships, and storytelling are positioned along a dual interpretative axis that distinguishes between what is visible and measurable (such as data, prices, services) and what is latent or emerging (like emotions, perceptions, expectations). In this way, scenario-building is not reduced to a predictive exercise, but becomes an exploratory and strategic tool, useful for examining the future conditions for rural tourism in terms of sustainability, territorial cohesion, quality of living, and new forms of hospitality.

The results emerging from the workshop session were oriented towards the construction of future scenarios and the identification of evolutionary trajectories for the short-term rental sector in European rural areas. The starting point for building the models was the analytical results from the previous phases: quantitative data, spatial analyses, and workshop outputs. These elements were then reinterpreted holistically, with the aim of constructing matrices of relationships among key variables, including local regulations, accessibility infrastructure, pricing strategies, the quality of host–guest relationships, the presence of welcoming communities, and the use of technologies and the degree of experiential innovation.

At the end of the sessions, the workshop concluded with a plenary feedback session, in which each moderator presented the main findings from their table, highlighting both shared perspectives and differences in viewpoints (Fig. 3).

The material produced during the participatory workshops was analysed to systematise the content that emerged from completing the canvas models. The qualitative analysis of the results enables the identification of shared perspectives, local challenges, and operational proposals, thereby contributing to the development of intervention strategies grounded in needs directly expressed by local stakeholders.

As a further creative output of the workshop, a ‘postcard from the future’ (Fig. 4) was produced through a generative prompt developed with artificial intelligence, offering an evocative and synthetic vision of rural hospitality in 2050.This narrative imagines a Europe where tourism serves as a regenerative tool. It focuses on genuine relationships, slow and personalized experiences, and lightweight technologies. However, the AI-generated image shows some limitations in capturing the identity of places. It lacks recognizable, place-based elements, making it hard to link the scene to a specific region, such as Molise or Poland. This points to a larger problem with generative AI; its visual outputs often create uniform and detached representations. This raises important questions about how well they convey local identity and regional uniqueness.

3.2 Data-Driven Analysis on Short-Term Listings

The analysis of short-term market trends across the six rural regions examined in the SYSTOUR project showed a varied short-term rental market influenced by local conditions and seasonal demand. Using the organised database and the spatial analyses created in the first phase of the SYSTOUR project, this research brought together descriptive summary statistics, thematic maps, and visual comparisons to show how pricing differs across the six European regions.

Data were collected from the Airbnb platform [29] between November 2024 and January 2025 using a specific sampling method. This was aimed at ensuring a balanced



Fig. 3. Workshop session and template of "Systemic Policies Model Canvas" completed by participants during the workshop, Turin, March 2025. (Source: Butticè, 2025)

representation of listings across the territories being studied. For each country, around 30 listings were chosen from a group of eight to twelve municipalities. These were identified based on their relevance to the study areas of the SYSTOUR project. Given the relatively small sample size, the findings should be interpreted as exploratory; they are not intended to be statistically representative of the broader short-term rental market, nor generalisable beyond the analysed cases. The choice of listings was not made randomly. It depended on verifying their geographical location and ensuring they fell within municipal or sub-municipal boundaries that matched the Good Governance and Practices (GGPPs) areas, identified and confirmed by regional project partners during the SYSTOUR project. For the short-term rental analysis, priority was given to municipalities that were either hosting or close to the GGPPs areas.

As these GGPPs represented key points for the analysis, short-term rental records were included only if their geographical location matched the defined reference areas. The database was designed to include listing-level features such as accommodation type, location, accessibility, rating, and average price per guest in both low and high seasons. This allows for both regional comparisons and localised interpretations of market trends.

An initial comparative result highlighted a clear divide between Mediterranean/Atlantic and Central-Northern European contexts. France, Spain, and Italy show

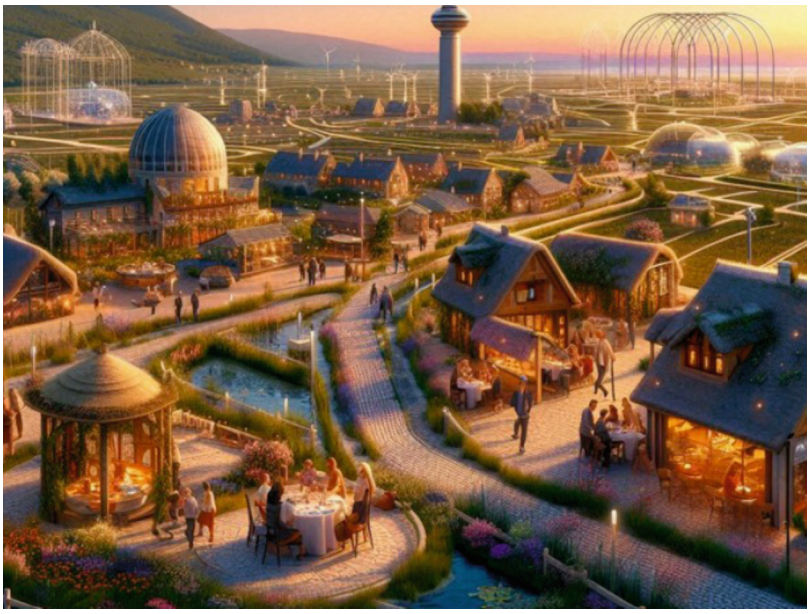

Fig. 4. AI-generated creative vision representing the desired future of rural tourism. (Source: Butticè, 2025)

a stronger seasonal pricing structure, with significant increases during the peak tourist season. Meanwhile, Poland, Finland, and Hungary have more stable price patterns throughout the year (Fig. 5).

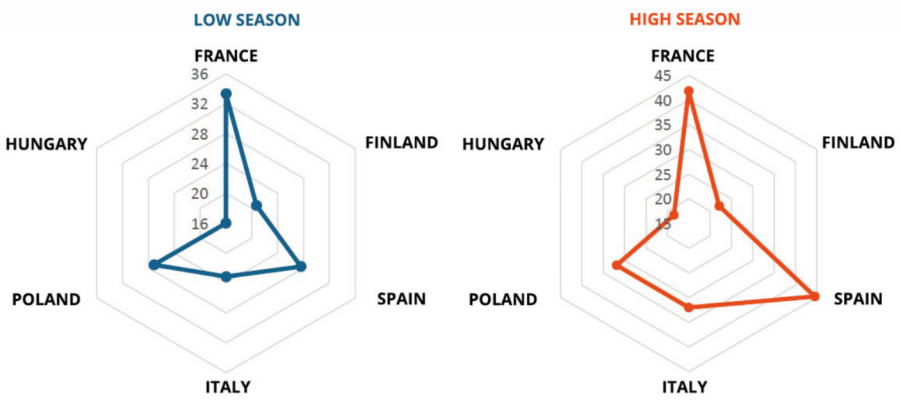

Fig. 5. Spider chart showing the average price per guest per night in the high season (orange) and low season (blue) across the six countries analysed. (Source: Butticè, 2025)

This pattern suggests that in the southern and western case studies, hosts tend to adopt a more demand-responsive pricing strategy, calibrating rates to summer high-season

peaks and the concentration of tourist flows. By contrast, in the northern and eastern regions, the lower seasonal gap indicates a more balanced and temporally distributed demand, which corresponds to less volatile pricing behaviour. The highest high-season averages (price per person per night) are in Spain (44.53 €) and France (41.83 €), followed by Italy (32.01 €), Poland (31.87 €), Finland (22.14 €), and Hungary (18.47 €).

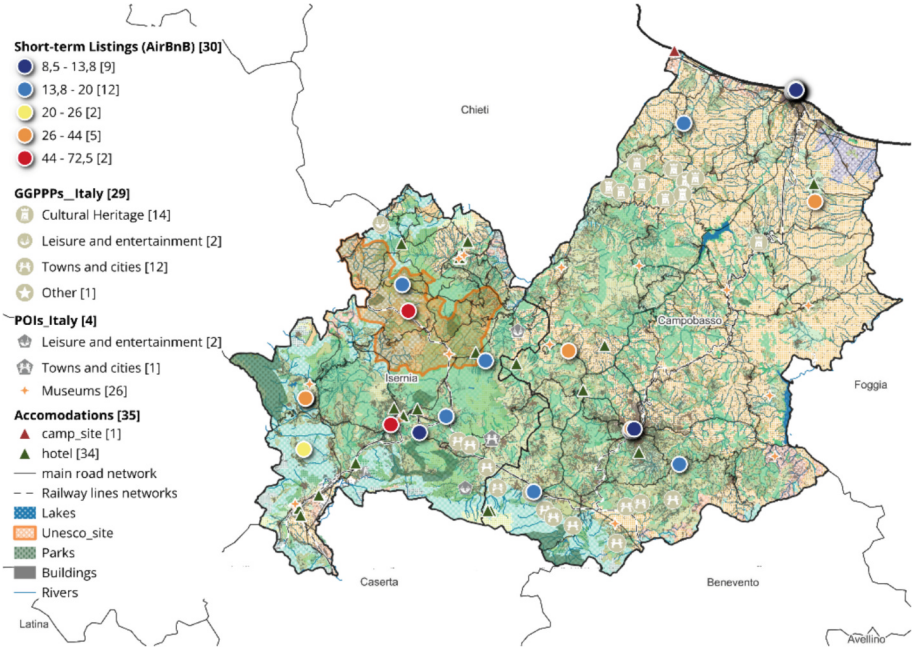

Fig. 6 The Molise Region in Italy, example of a territorial map (Elaboration of the authors)

The territorial map (Fig. 6) further refined this analysis by showing that pricing is not only shaped by macro-regional seasonality, but also by micro-spatial factors such as proximity to coasts, urban centres, railway stations, and tourism services. In the Molise case, for instance, the spatial distribution of prices highlights higher values in coastal and more central areas of Termoli, while more peripheral zones remain associated with lower rates. The map integrates price classes (ranging approximately from €34 to over €100) with the distribution of points of interest (particularly cultural heritage sites, leisure facilities, and accommodation types), revealing a partial spatial correspondence between higher prices and areas with greater tourism infrastructure and attraction density.

The statistical descriptive analyses results confirmed this tendency (Table 1): the average price per guest per night rises from 23.15 € in low season to 32.01 € in high season, corresponding to an absolute increase of 9.35 € and a relative increase of + 56.85%. This substantial gap indicates that market trends in emerging rural destinations are strongly influenced by seasonal demand pressure and by the uneven spatial distribution of local attractiveness.

Table 1. Statistical distribution of short-term accommodation prices per guest per night in Molise (Italy), comparing low and high seasons. (Elaboration of the authors on Butticè, 2025)

Season	Min (€)	Max (€)	Mean (€)	Median (€)	Weighted Mean (€)	Std. Dev.	Absolute Delta (€)	Relative Delta
Low season	8.5	72.5	23.15	17.5	20.07	15.3	9.35	56.85%
High season	12.5	68.5	32.01	31.76	30.37	13.01		

Overall, the combined reading of database outputs, thematic maps, and descriptive statistics showed that rural short-term rental markets cannot be interpreted as purely economic adjustments. Rather, they reflect the interaction between seasonal tourism intensity, territorial accessibility, and the degree of market consolidation in each region. From this perspective, price variability serves as a useful proxy for understanding not only market performance but also the different levels of maturity, resilience, and temporal diversification that characterise rural tourism systems across Europe.

4 Conclusion

This research confirms that short-term rentals, particularly those mediated by platforms such as Airbnb, represent an increasingly relevant component of rural tourism systems in Europe, contributing to their diversification and potential sustainable development. Moving beyond the initial hypothesis, the results demonstrate that rural areas are not marginal within the contemporary tourism landscape [30]; rather, they are integrated into new paradigm and differentiated real estate market structures.

The analysis of the short-term rental market across the six regions shows a clear pattern that goes beyond just the Molise case. A key finding is the rise of a dual market setup at the European level. Southern and Western regions, like Italy, Spain, and France, experience strong seasonal price swings. Prices can jump significantly during peak times, such as an increase of up to 56.85% in the Molise case. This reflects a pricing strategy driven by demand, which is closely connected to high tourist traffic. In contrast, Central and Northern regions, including Poland, Finland, and Hungary, have more stable pricing. This stability suggests a more even demand throughout the year and less noticeable seasonality. This difference shows how geography and tourism demand shape market dynamics. At the territorial level, the findings show that pricing is affected not only by seasonal changes but also by local factors. The distribution of listings shows a polycentric pattern, with clusters of short-term rentals focused around important cultural, natural, and infrastructure resources. Being close to coasts, urban centres, transport hubs, and tourism services plays a key role in determining prices and the density of accommodations. The Molise case illustrates a wider trend seen in the study areas: higher prices tend to be linked to areas with better accessibility and a greater number of attractions, while more remote areas stay in lower price ranges. The combination of statistical analysis, spatial mapping, and database structuring shows that pricing strategies in rural short-term

rental markets cannot be viewed just as economic changes. Instead, they represent the interaction between seasonal tourism intensity, territorial accessibility, and the level of market consolidation. In this context, price variability serves as a way to understand larger structural conditions, including the maturity, competitiveness, and seasonal diversity of rural tourism systems.

The participatory dimension of the research, developed through the Systemic Policies Model Canvas, supports these findings by pointing out shared systemic challenges in different regions. These challenges include fragmented governance, limited infrastructure, and the need for coordinated policy frameworks. Using AI-supported tools in workshops has improved the ability to gather stakeholder perspectives in real time. This change helps create better co-design processes and supports decision-making based on evidence.

Overall, the study suggests that short-term rentals can drive territorial regeneration when included in clear policy strategies and inclusive governance models. They can shift tourism flows, highlight local assets, and offer flexible accommodation options. This makes them an important tool for rural development. Lastly, these findings highlight the need to view short-term rentals not as separate market issues, but as important parts of place-based development strategies. They can help create more balanced, strong, and sustainable rural tourism systems across Europe.However, some limitations still exist, especially regarding the sample size and its representativeness. Expanding the dataset and adding long-term analyses would provide a clearer view of changing market dynamics and improve the strength of future research.

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