

# Zeitwohnen Update

The Newsletter for the New Form of Housing Mobility



## Jan Hase

Jan Hase is the Co-founder and CEO of Wunderflats GmbH, the market leader for flexible housing in Germany. Wunderflats has its headquarters in Berlin.

## Dear Readers, Dear Friends of Zeitwohnen,

The debate over long-term flexible housing has gained further momentum in recent months. The focus is on issues such as rising rents, limited housing supply, and the role of this segment in the housing market. It is often assumed that long-term flexible housing contributes to the housing shortage or displaces regular housing. At the same time, more extensive regulatory interventions are coming into political focus.

What has often been missing from the debate so far is a robust empirical foundation. To establish this, we commissioned two independent studies from the [ifo Institute](#) and [Prognos AG](#). They analyze the market structure, the demand for long-term flexible housing, and its significance for the labor market and economic development. The findings present a more nuanced picture. Long-term flexible housing is a very small segment with no demonstrable displacement effect and, at the same time, fulfills an important function for professional mobility.

This policy briefing summarizes the key findings and helps to objectify the current debate.

Yours sincerely,



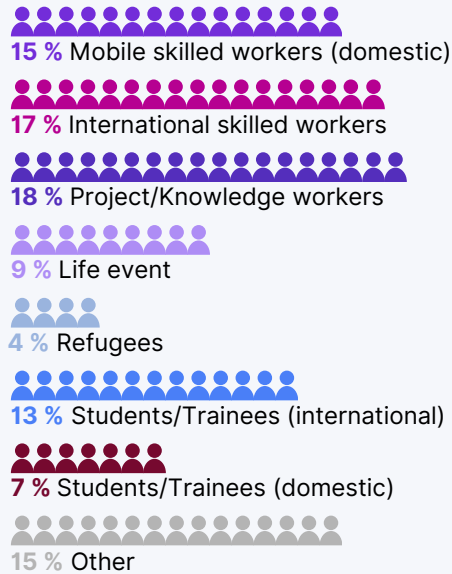
# Housing Market and Temporary Rentals

Democratization of housing sustainably eases pressure on conventional housing markets



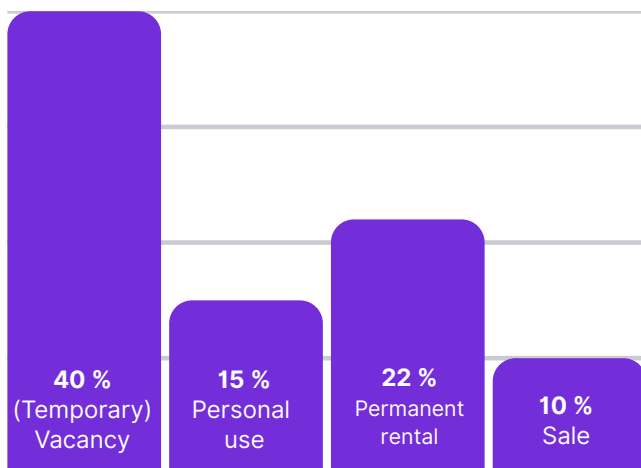
## Long-term flexible housing serves a clear purpose in the market

Long-term flexible housing is a very small segment of the housing market, but it plays an important role in the labor market. It is primarily used when people move to another city for a new job, a project, or a career change. For many, having access to housing is a prerequisite for taking this step at all. At the same time, analyses show that restrictions in this segment do not have the often expected effects on the housing supply. In many cases, apartments would not return to the regular rental market but would be used for other purposes or withdrawn from the market. At the same time, it becomes clear that a significant portion of users cannot take up employment, or can only do so with a delay, without a suitable housing option. Long-term flexible housing not only affects the housing market but also directly influences the availability of labor and, consequently, Germany's economic success.



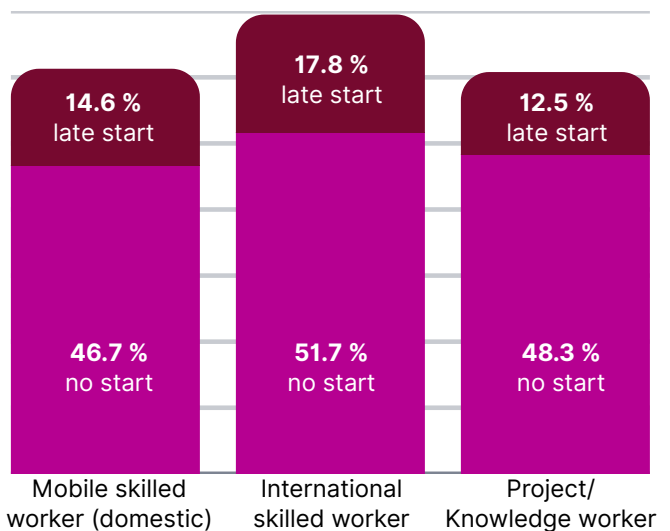
### Who uses long-term flexible housing?

Percentage of Wunderflats prospective tenants with specific needs for long-term flexible housing.



### The impact of stricter regulations on the housing supply

Landlords' reactions on Wunderflats to a limit on temporary rentals of six months.

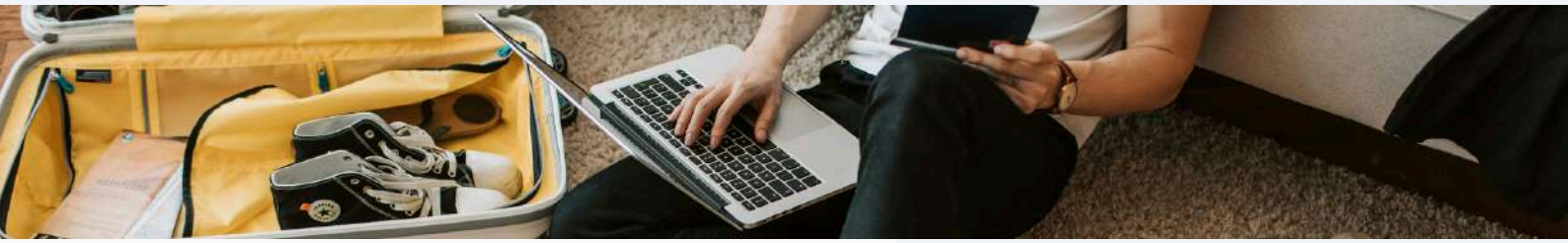


### Starting a new job or project without housing

Share of surveyed Wunderflats prospects moving to Berlin who, without flexible long-term housing, could not have started their job or project on time or at all.

Sources: ifo Institute, prognos, and data from the platform [www.wunderflats.com](http://www.wunderflats.com).

## Democratization of housing sustainably eases pressure on conventional housing markets



### Small segment, big impact

The public debate on long-term flexible housing often paints a distorted picture of its actual scale in the housing market. An analysis by the ifo Institute shows that long-term flexible housing accounts for only about 0.7 to 0.8 percent of the total housing stock. This clearly underlines that it is a niche segment whose scale bears no relation to the level of political attention it receives. Nor is the assumption that long-term flexible housing diverts a significant number of apartments from the regular rental supply supported by the data. Rather, the study shows that both segments develop alongside each other without any discernible systematic correlation in the sense of displacement.

The frequently cited high visibility of long-term flexible housing on online portals is due to shorter rental cycles. This creates a misleading impression of its actual market scale in both public and political discourse. At the same time, the study "Demand and Effects of long-term flexible housing" by Prognos AG draws attention to a perspective that has so far received too little consideration in the debate.

The demand for long-term flexible housing does not arise by chance but follows clear patterns. It is closely linked to professional mobility and is driven primarily by skilled workers, project employees, and internationally mobile workers. For many of these user groups, access to long-term flexible housing is not merely an optional offering but a functional prerequisite for being able to take on a new job at all.

Long-term flexible housing therefore fulfils a specific role within the housing market structure. It complements the regular rental market where the latter reaches its structural limits, particularly in cases of short-term and time-limited needs. In this capacity, it becomes clear that this is not an interchangeable segment, but rather an independent component of an increasingly mobile work and living reality in modern, dynamic economies. It is precisely this function that makes clear that interventions in this segment do not remain without consequences, but rather affect economic dynamics beyond the housing market.

### Key Questions

#### **Does long-term flexible housing make up a large portion of the housing market?**

No, accounting for only 0.7 to 0.8 percent of the total rental supply, this is a very small segment in quantitative terms, and its scale in the political debate is clearly overestimated.

#### **Does long-term flexible housing take apartments away from the regular rental supply?**

No, the available studies find no reliable evidence of a systematic crowding-out effect; rather, the two segments develop largely independently of one another and respond in parallel to broader market trends, such as rising demand in urban areas.

#### **Why does long-term flexible housing appear so prominently in listings?**

This impression arises from structural distortions in the data. Because long-term flexible housing has significantly shorter lease cycles, it is relisted much more frequently. This makes it disproportionately visible on online portals, even though it does not account for a large share of the overall housing supply.

#### **Who actually uses long-term flexible housing?**

It is primarily used by skilled workers, project-based employees, and internationally mobile professionals for whom housing available at short notice is often a key prerequisite for taking up a new position or enabling professional mobility in the first place.

#### **In practice, how short-term is the need for long-term flexible housing?**

Studies show that a significant portion of the demand arises within a few weeks, which underscores the fact that these are often urgent transitional situations and that housing available at short notice is a functional prerequisite for mobility.



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## Regulation with no effect, but at a significant cost

The assumption that stricter regulation of long-term flexible housing would lead to a greater supply of permanently available housing is not supported by the available studies. The analysis by the ifo Institute shows that a significant proportion of landlords would not make their apartments available on the regular rental market if additional restrictions were imposed. Instead, many units would remain vacant, be used by the owners themselves, or be sold. As a result, the intended effect of a noticeable expansion of rental supply would largely fail to materialize and would provide only limited practical relief. At the same time, the underlying demand remains unchanged. The Prognos study shows that many users obviously continue to require long-term flexible housing even when supply is constrained. For companies, this has direct and tangible consequences: positions cannot be filled in time, project launches are delayed, and international skilled workers postpone or cancel their relocation plans altogether. Particularly in already tight labor markets, this creates noticeable friction losses that extend across entire value chains and occur simultaneously in numerous industries. The economic effects of these developments can now be quantified. The Prognos study shows that, on average, around 65,000 Euros in annual value added can be lost per affected person if employment does not commence or is delayed. Extrapolated to the national level, this results in a potential loss of up to 3.6 billion Euros per year in Germany. For Berlin alone, the estimated effect amounts to as much as 777 million Euros annually. Behind these figures are concrete economic consequences in the form of unfilled positions, postponed projects, and lost productive activity. Taken together, this demonstrates that blanket restrictions on long-term flexible housing fail to achieve their intended objective while simultaneously creating new economic risks. They do not generate significant additional housing supply, but instead intensify shortages in other areas. Long-term flexible housing should therefore not be regarded as a disruptive factor in the housing market, but rather as a necessary complement that enables mobility, attracts skilled workers, and supports economic dynamism across a wide range of sectors while helping to stabilize it over the long term.

## Political Recommendations

### Align regulation with real market mechanisms.

Restrictions on long-term flexible housing do not automatically lead to more permanent housing, as a large proportion of these units would not be made available on the regular rental supply. Measures should therefore be based on factual data and actual causal relationships.

### Establish a reliable data foundation.

Housing policy decisions should not be based primarily on listing data that overstates the size of this market segment. Reliable data on housing supply and demand are necessary to realistically assess market conditions and avoid misguided policies.

### Take long-term flexible housing needs into account in a structural manner.

A significant portion of the demand arises on short notice and cannot be met by the slow regular rental market. Long-term flexible housing fills this gap and facilitates mobility on short notice.

### Recognize long-term flexible housing as part of the economic infrastructure.

Long-term flexible housing enables skilled workers to take on short-term employment, which would not be possible under a standard rental arrangement. Studies show that without long-term flexible housing, people would delay taking on work or not take it on at all, resulting in a measurable loss of economic value. Restrictions can exacerbate these effects and directly hinder economic activity.

# The Wunderflats Team

Shape the future of housing with us



## Join us on the road to the future of housing

Wunderflats is a digital platform for flexible housing that brings together the demand and supply of landlords and tenants.

While vacation rentals take away housing space from cities, long-term flexible housing helps relieve the pressure on the traditional housing market. This is because specialists, project workers, and highly specialized experts often request apartments that are rented out temporarily in a manner that conforms to the intended use, but are not currently available to the permanent housing market.

At the same time, long-term flexible housing is still too little known in terms of its importance and the many opportunities it offers, among other things, for a fair housing market and its contribution to economic promotion by solving the shortage of skilled workers.

Therefore, it is necessary to create a framework that recognizes long-term flexible housing as a pillar of support and a solution to the problem.



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As a digital scale-up from the heart of Berlin, Wunderflats welcomes any dialogue on digital and housing policy issues.

