



# Q1 2026

## Quarterly Market Rates Report

### EMEA

Data compiled from Dwellworks Living proprietary Market Rate Indicator based on worldwide confirmed bookings

Activity at the end of 2025 and the start of 2026 reflects a slowness in corporate demand based on holiday schedules, with the exception of Dubai, which enters its busiest season during the winter months.

Rates for stays in key corporate housing/temporary living markets in EMEA remain stable, though ongoing geopolitical turmoil and economics may impact relocation and business travel, with a consequent impact on pricing and supply. We are not currently experiencing any availability disruptions.

The Milano-Cortina Winter Olympics in northern Italy run from February 6-22. For more information on the games and regional accommodations options, read our full briefing [here](#).

Rental supply in several European cities, including Barcelona and Amsterdam, continues to be challenged by government regulation, large and growing rental populations, and limited new development. London has experienced expanded housing supply – and suppliers reported good booking activity through the end of the year.

Observations on ADR (Average Daily Rate) trends in EMEA:

- Across EMEA, 1 BR ADRs range from \$140 in Aberdeen to \$220 in Dubai
- Several markets, including Dublin, Abu Dhabi, are experiencing expanded relocation-related activity.

Dwellworks Living is a sponsor of FACCT: The Furnished Accommodations Carbon Calculation Tool and will be presenting a sustainability update as well as sponsoring a session on AI in Corporate Housing at CHPA Connect26 in Austin, Texas, February 16-18<sup>th</sup>.

All pricing presented in USD for ease of comparison. Note 3-BR sample size is limited. Trend rates reflect pricing for 1- and 2-BR units.

CITY	1 BR ADR	2 BR ADR	3 BR ADR	1 BR ADR TREND VS PREVIOUS QUARTER*	BOOKING TREND VS SAME TIME LAST YEAR**	AVAILABILITY	MARKET INFLUENCERS
<b>ABERDEEN, UK</b>	\$140	\$173	\$220	Lower	Lower	Excess Capacity	Activity impacted by fluctuating energy sector
<b>ABU DHABI, AE</b>	\$210	\$280	\$350	Higher	Higher	Balanced Capacity	Increased relo and business travel; continued global investment
<b>AMSTERDAM, NL</b>	\$195	\$270	\$380	Lower	Higher	Limited Capacity	Restrictive regulation; limited new construction; supply/demand imbalance
<b>DOHA, QA</b>	\$199	\$260	\$298	Unchanged	Unchanged	Balanced Capacity	Activity related to aerospace/defense spending
<b>DUBAI, AE</b>	\$220	\$330	\$420	Higher	Higher	Balanced Capacity	Continued demand; winter is 'high season' and reflected in ADR
<b>DUBLIN, IE</b>	\$168	\$205	\$259	Unchanged	Higher	Balanced Capacity	Steady/increasing relo activity
<b>THE HAGUE, NL</b>	\$176	\$200	\$240	Unchanged	Lower	Balanced Capacity	Flat demand and decrease in relo activity
<b>LONDON, UK</b>	\$234	\$325	\$380	Lower	Higher	Balanced Capacity	Expanded development / good supply and consistent booking activity
<b>MADRID, ES</b>	\$157	\$189	\$240	Hgher	Lower	Balanced Capacity	The market is experiencing more leisure travel, putting some pressure on inventory
<b>MUNICH, DE</b>	\$160	\$280	\$340	Unchanged	Unchanged	Balanced Capacity	Flat demand YOY
<b>PARIS, FR</b>	\$195	\$242	\$260	Unchanged	Unchanged	Balanced Capacity	Decline in relo activity
<b>RIYADH, SA</b>	\$245	\$315	\$450	Higher	Higher	Limited Capacity	More housing overall but gaps remain in meeting client specifications

\*ADR = Average Daily Rate at time of reporting (retroactive to end of previous month)

\*\*Unchanged indicates less than 5% variance in rates versus previous quarter

All rental rate information is subject to change and deemed reliable at the time of publication but not guaranteed