

# Owen Reilly Report Q1 2026



## Q1 2026 Current Trends in the Dublin residential property market

Our Q1 transactional data points to a strong and highly competitive Dublin residential market. Prices have continued to rise, with selling prices now averaging over 11% above asking, while transaction volumes have also slightly increased year-on-year. At the same time, a rise in fall-throughs highlights a degree of caution emerging among buyers following competitive bidding environments.

### Sales Market: A Faster, More Competitive Seller's Market

89% of our listings were agreed above asking, with an average sale price of €695,457—11.9% above our asking prices (€625,263) and a significant increase on Q1 2025 levels. Sellers continue to benefit from tight supply and strong demand, particularly for well-presented, turn-key properties in prime locations. A notable shift this quarter is the speed of the market. Properties were agreed in an average of just 4.9 weeks, down from 8.6 weeks a year earlier, reflecting a depression in supply leading to heightened competition.

### Who's Buying—and Who's Selling

Owner-occupiers dominated even more strongly this quarter, making up 95% of our buyers, up from 83% a year ago. First-time buyers remain a key cohort, particularly in the sub-€500k price range. Our typical buyer is Irish, aged 41, and mortgage-backed. Mortgage-funded purchases increased significantly to 71%, while cash buyers declined to 29%, reinforcing the shift toward owner-occupier driven demand. 68% of our single buyers are women! Investor activity has reduced sharply, accounting for just 5% of buyers, compared to 17% a year ago. On the selling side, 68% were landlords, reflecting ongoing pressure in the rental sector and continued investor exits.

### Rental market trends

Our rental transactions are down 10% year on year reflecting very tight inventory and average tenancy terms extending. Average rent in our portfolio is now €3,118 per month, 5% higher than a year ago. Are typical tenant is from continental Europe and 34 years of age. 48% are working in the technology sector.

### Looking Ahead

As we move further into 2026, the sales market remains firmly in favour of sellers, supported by strong demand and limited supply. Accurate pricing and strategic marketing will be key to maximising results, particularly as buyers become more considered post-agreement. Turn-key properties in prime locations are expected to continue outperforming, while investor participation is likely to remain subdued. The situation in the Middle East has not impacted sentiment...yet. Broader economic conditions, interest rates, and government policy will continue to shape the trajectory of the market throughout the year.

## Market Highlights

Average Selling Price

**€625,263**

Asking Price v Selling Price Variance

**+11.9%**

Average Selling Price per sq. ft

**€8,028**

% of properties that sold above asking

**89%**

Sales Fall Through Rate

**12%**

Average Buyer Age

**41**

% of Sellers who are landlords

**68%**

Weeks On Market

**4.9**

Average Tenant Household Salary

**€144,763**

Average Monthly Rent

**€3,118**

Average Tenant Age

**34**

% of Tenants working in Technology

**48%**

# Dublin Residential Sales Market

## Q1 2026 Transactional Data (compared to Q1 2025)

% Percentage difference with Q1 2025

€625,263 (€555,257) +12.6%

€695,457 (€593,934) +17%

+11.9% (+9.6%) +23.9%

**Average Asking Price:**

**Average Selling Price:**

**Asking Price V Selling Price Variance:**

4.9 (8.6) -43%

12% (6%)

€8,028 / €746 (€7,731 / €719) +3.7%

**Weeks On Market:**

**Fall Through Rate:**

**Average Selling Price per sq. m. / sq. ft.**

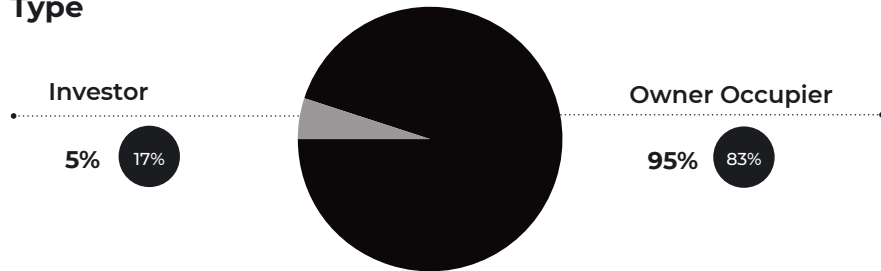


6 Argyle Road, Donnybrook, Dublin 4 on the market for €2.6 million

## Buyer Profile

% Q1 2025

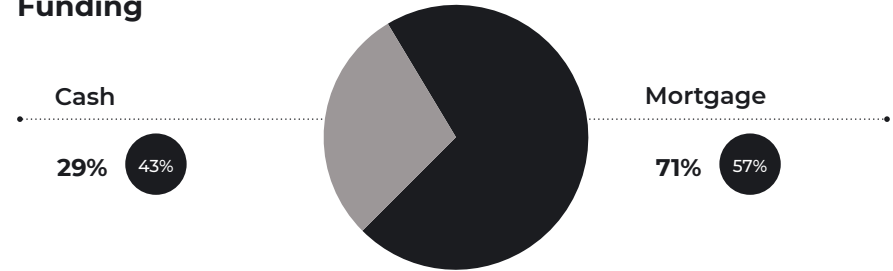
### Type



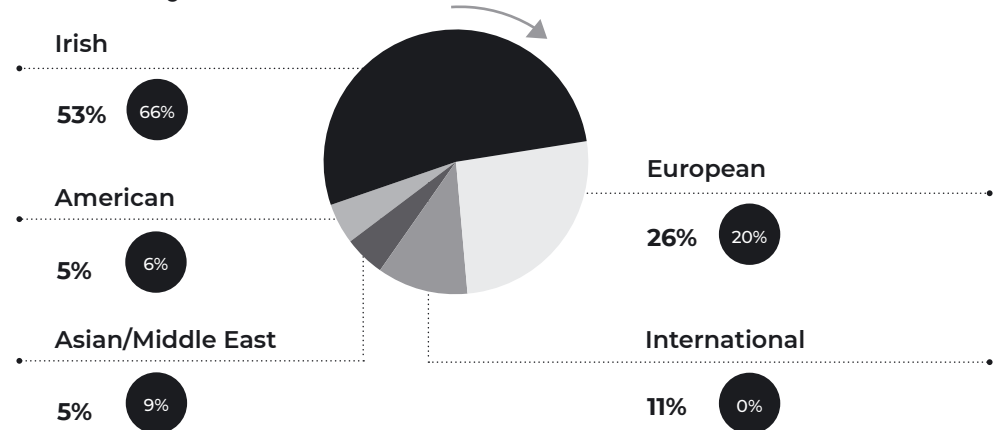
### Owner Occupier breakdown



### Funding

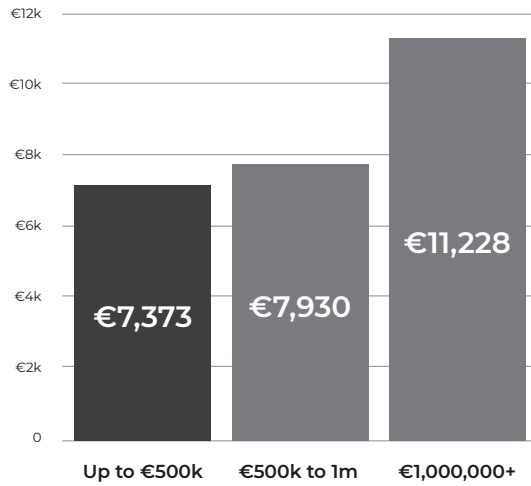


### Nationality



## Selling Data

Average selling price per Sq. M.



Average weeks on market

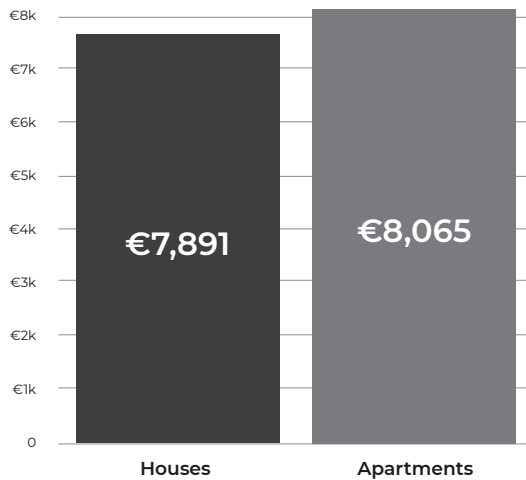


Variance between asking and selling prices

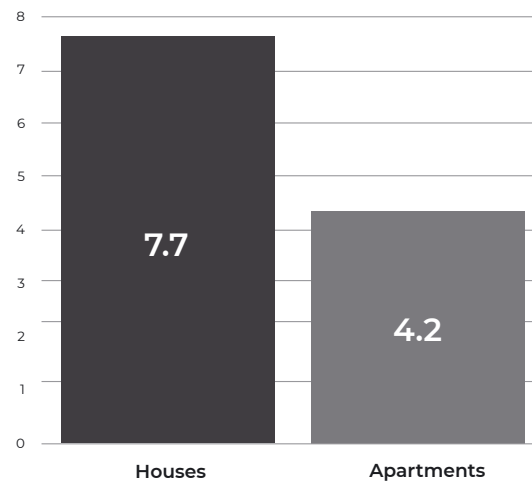


## Apartments v Houses

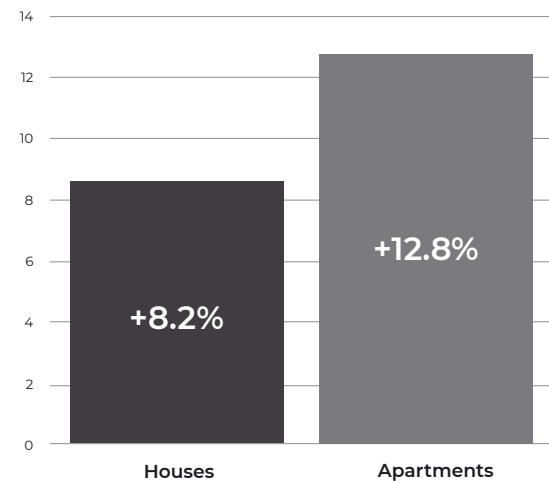
Average selling per Sq. M.



Average weeks on market



Variance between asking and selling prices



# Dublin Residential Rental Market

## Q1 2026 Transactional Data (compared to Q1 2025)

% Percentage difference with Q1 2025

€2,186 (€2,168)

+1%

Average One Bed Monthly Rent:

€2,965 (€2,978)

0%

Average Two Bed Monthly Rent:

€5,860 (€4,835)

+17%

Average Three Bed Monthly Rent:

€3,118 (€2,962)

+5%

Average Monthly Rent:

€144,763 (€145,997)

-1%

Average Household Salary:

+1.25% (+1%)

Rent Inflation:

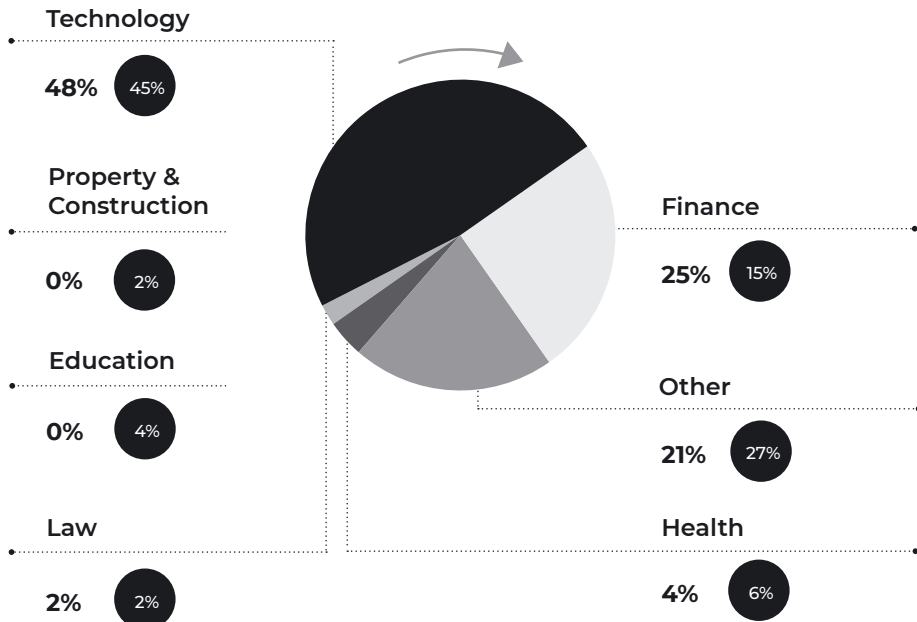


16 Morehampton Road on the market for €12,000 per month.

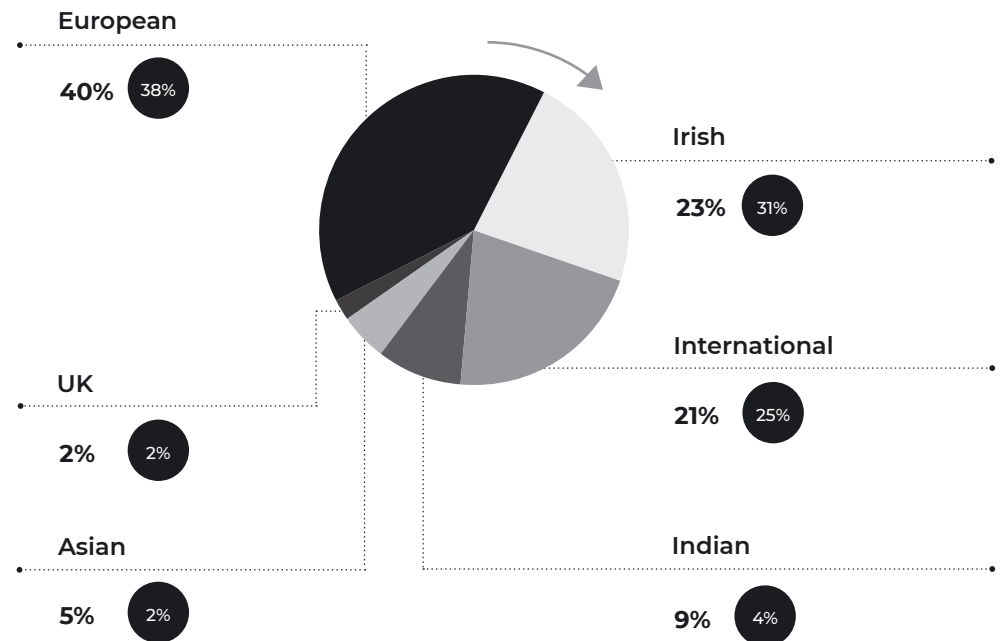
## Tenant Profile

% Q1 2025

### Work Sectors



### Nationality



# owenreilly

The doors of Dublin we have sold.



We would love to sell yours!

## Docklands Branch

3 Forbes Street,  
Grand Canal Dock,  
Dublin 2.

📞 01-6777100

## Southside Branch

8 Merrion Road,  
Ballsbridge,  
Dublin 4.

📞 01-6777101

## City Centre Branch

4 Camden Street,  
Grantham Street,  
Portobello, Dublin 8.

📞 01-4751275

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The information in this document is based on transactions only and our observations of the market. However, Dublin comprises unique and diverse neighbourhoods and features many very different developments. We will be pleased to provide more detailed breakdowns or background information to particular areas or developments.