

Property Market Indicator Summary

All data to week ending 10 August 2025

Preliminary clearance rates lose a 'little' steam

Across Australia's capital cities, 1,584 homes were taken to auction last week, roughly in line with the number seen the week prior (+0.6%) but 16.2% lower relative to the same week a year ago (1,891).

After reaching a 12-month high at the end of July (74.7%), auction markets have lost a little steam in the first two weeks of August, with the combined capital's preliminary clearance rate coming in at 71.7% last week, down from 72.3% the previous week.

Despite the lower result, the preliminary capital city clearance rate has held above the 70% mark for nine weeks running, reflecting a solid improvement in selling conditions as we lead into spring. With another rate cut almost a certainty on Tuesday, it will be interesting to see if early clearance rates bounce higher this week.

Melbourne hosted 742 auctions last week, up from 730 the week prior. While last week's result of 70.9% marked Melbourne's fifteenth consecutive week with a preliminary clearance rate above the 70% mark, it was also the city's lowest early result in four weeks.

559 auctions were held in Sydney last week, down 2.1% from the 571 held the previous week. 74.3% of the 443 auction results reported so far were successful. Although down from 74.9% the previous week, last week was Sydney's ninth consecutive week with an early clearance rate above 70%.

Brisbane led the volume of auctions across the smaller markets, with 127 homes taken to auction, in line with the week prior (128). 67.0% of homes have so far been reported as sold, marking the city's lowest preliminary clearance rate in four weeks.

92 homes went to auction in Adelaide, with 70.3% returning a positive result – the highest in three weeks.

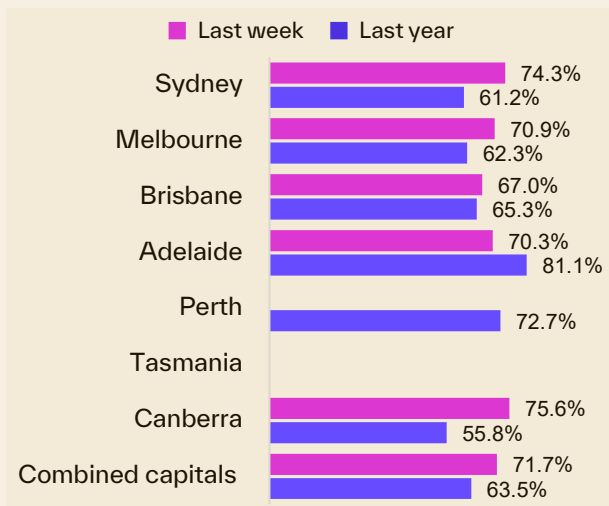
The ACT saw 56 homes auctioned last week and reported an early clearance rate of 75.6%, which was the capital's highest result since June 2024 (76.5%).

Eight auctions were held in Perth last week, with one of the five results collected so far reporting a positive result. There have been no auctions in Tasmania for the past three weeks.

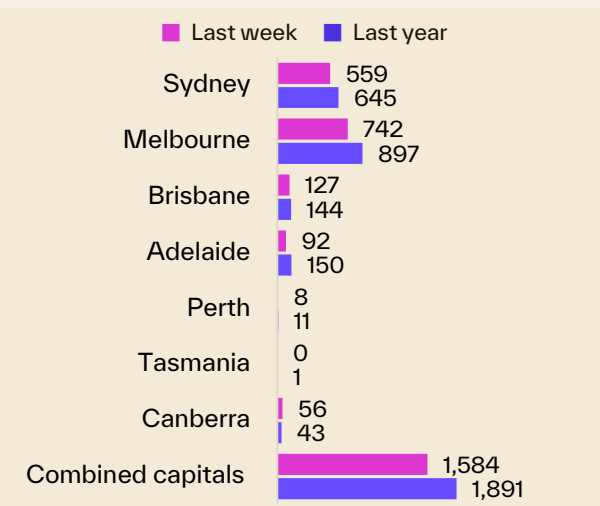
The volume of auctions is set to rise in the coming weeks, with approximately 1,940 homes scheduled for auction this week, and just over 2,000 set for auction the week after.

Capital City Auction Statistics (Preliminary)

Clearance rate



Total auctions



Media enquiries: media@cotality.com

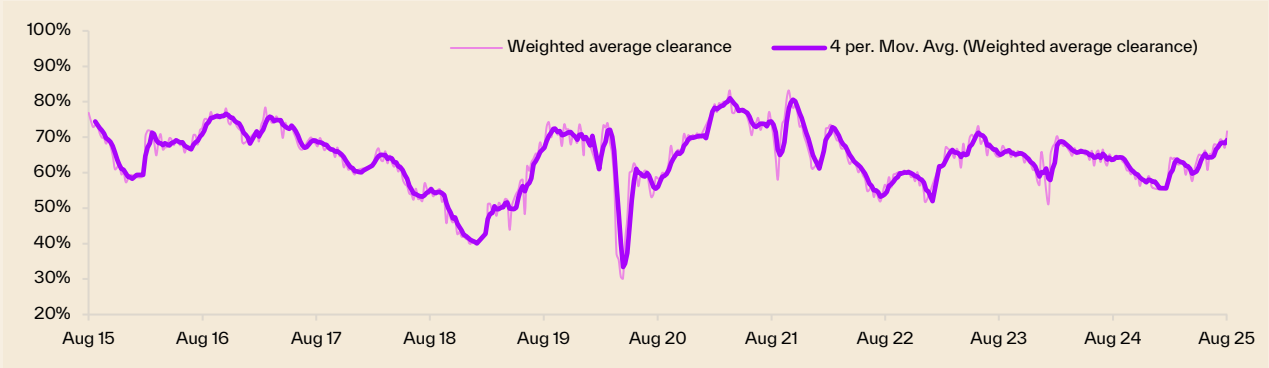
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Capital City Auction Statistics (Preliminary)

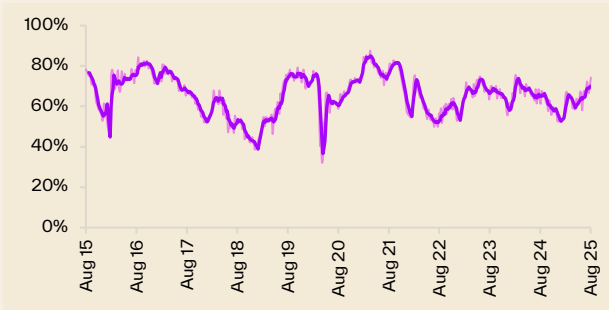
City	Clearance rate	Total auctions	Cotality auction results	Cleared auctions	Uncleared auctions
Sydney	74.3%	559	443	329	114
Melbourne	70.9%	742	609	432	177
Brisbane	67.0%	127	91	61	30
Adelaide	70.3%	92	64	45	19
Perth	n.a.	8	5	1	4
Tasmania	n.a.	0	0	0	0
Canberra	75.6%	56	41	31	10
Combined capitals	71.7%	1,584	1,253	898	355

Weekly clearance rates

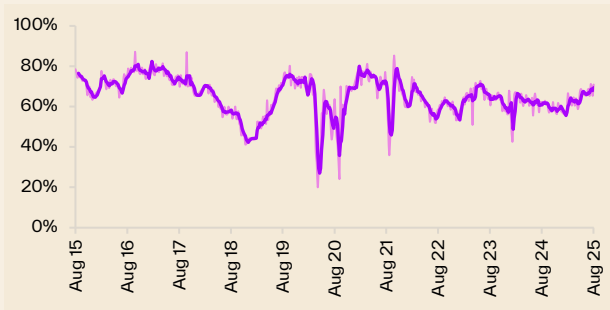
Combined capital cities



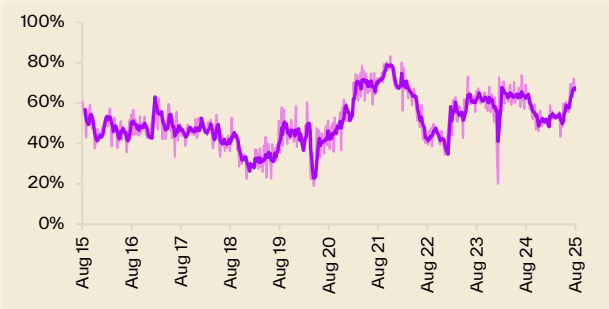
Sydney



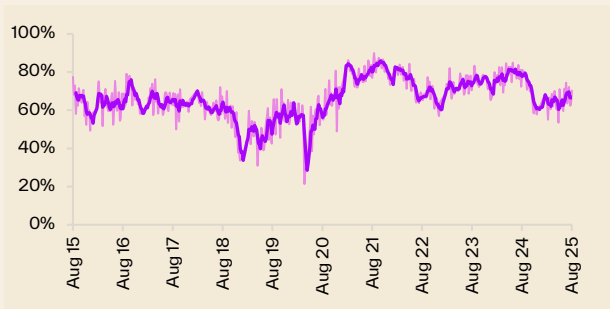
Melbourne



Brisbane



Adelaide



Property Market Indicator Summary

Sub-region auction statistics (Preliminary)

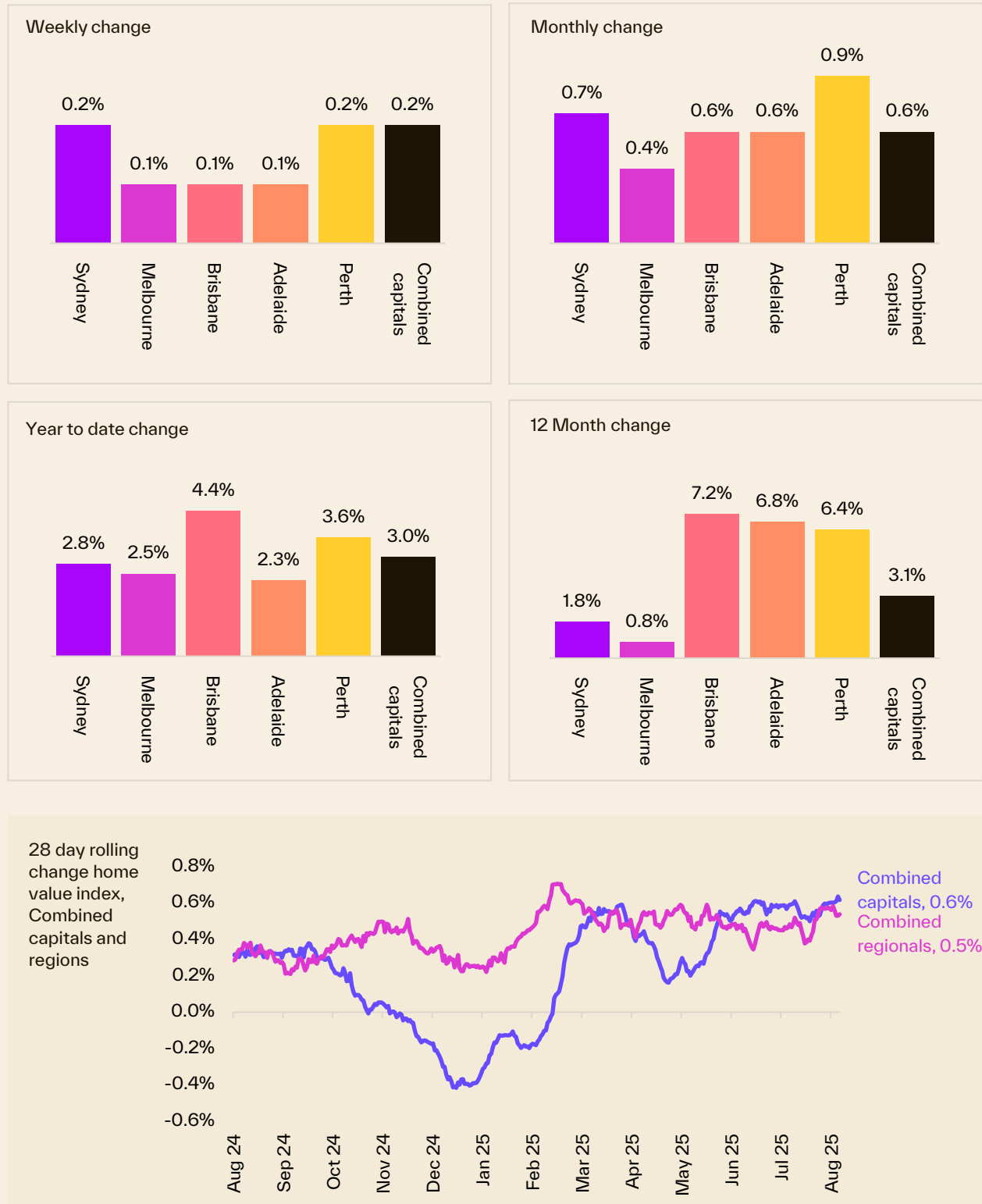
Region	Clearance rate	Total auctions	Collected results	Cleared auctions	Uncleared auctions
Sydney sub-regions					
Central Coast	n.a.	12	9	4	5
Baulkham Hills and Hawkesbury	83.3%	30	18	15	3
Blacktown	73.7%	37	19	14	5
City and Inner South	65.9%	44	41	27	14
Eastern Suburbs	70.4%	28	27	19	8
Inner South West	79.0%	74	57	45	12
Inner West	77.5%	47	40	31	9
North Sydney and Hornsby	77.6%	72	58	45	13
Northern Beaches	82.1%	31	28	23	5
Outer South West	n.a.	5	3	2	1
Outer West and Blue Mountains	40.0%	11	10	4	6
Parramatta	78.0%	61	50	39	11
Ryde	66.7%	28	21	14	7
South West	75.0%	51	36	27	9
Sutherland	77.8%	30	27	21	6
Melbourne sub-regions					
Inner	56.4%	87	78	44	34
Inner East	72.0%	103	82	59	23
Inner South	76.9%	101	78	60	18
North East	67.1%	101	79	53	26
North West	80.3%	82	71	57	14
Outer East	81.1%	63	53	43	10
South East	83.6%	80	61	51	10
West	56.7%	106	90	51	39
Mornington Peninsula	81.3%	17	16	13	3
Regional SA4					
Newcastle and Lake Macquarie	75.0%	30	28	21	7
Illawarra	n.a.	9	8	6	2
Gold Coast	66.7%	29	21	14	7
Sunshine Coast	64.3%	28	14	9	5
Geelong	n.a.	9	6	4	2

The above results are preliminary, with ‘final’ auction clearance rates published each Thursday. Cotality, on average, collects 99% of auction results each week. Clearance rates are calculated across properties that have been taken to auction over the past week.

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Property Market Indicator Summary

Capital city home value changes

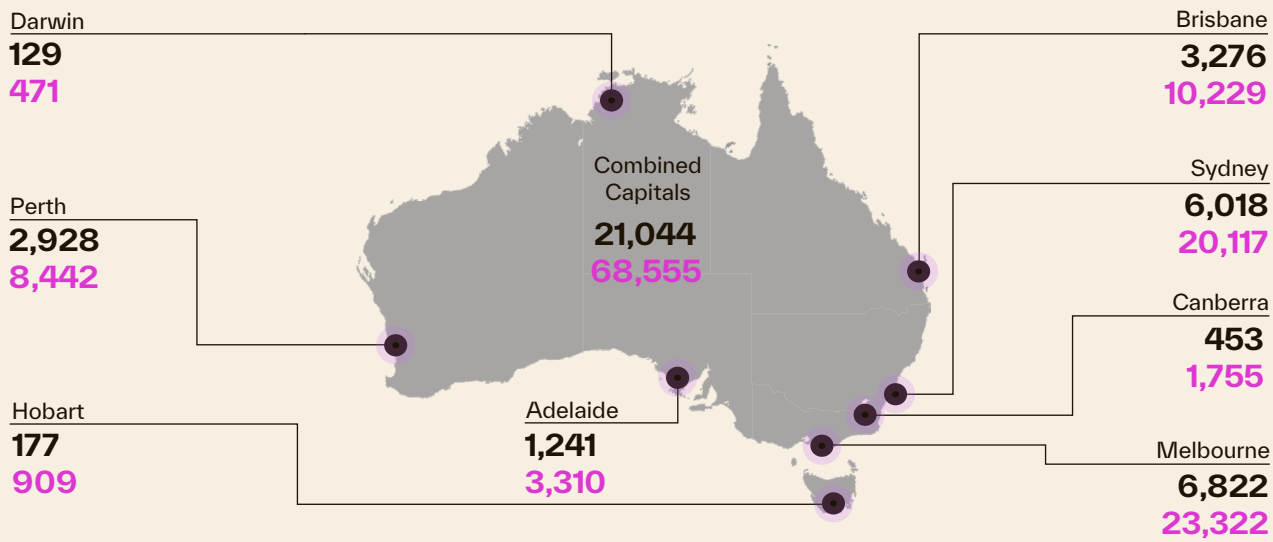


Results are based on the Cotality Daily Home Value Index. Further information and daily updates on the index results are available from <https://www.cotality.com/au/our-data/indices>.

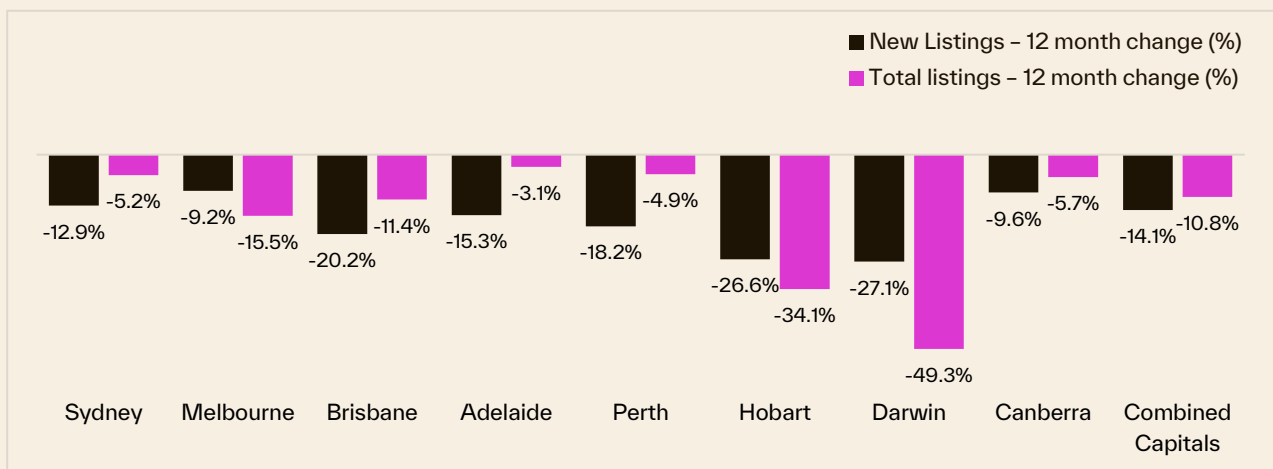
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Property Market Indicator Summary

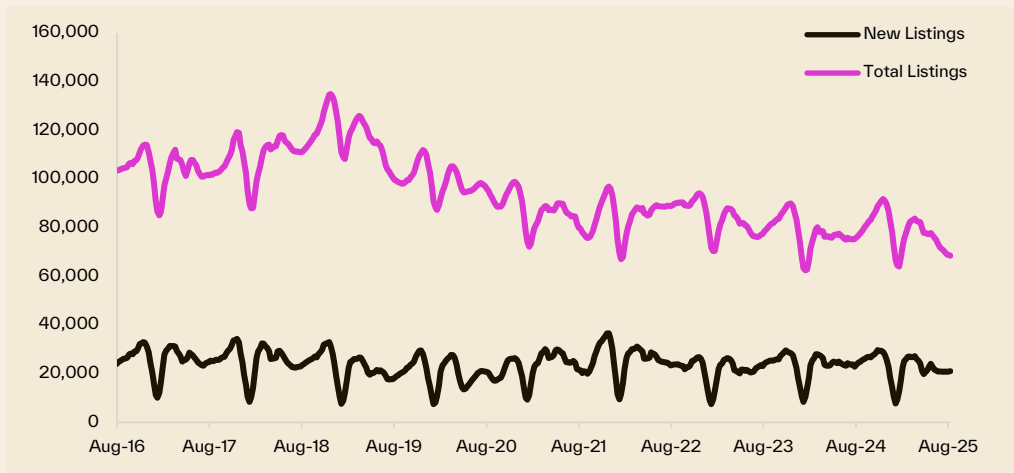
Capital city properties listed for sale – four week count



Listings – 12 month change (%)



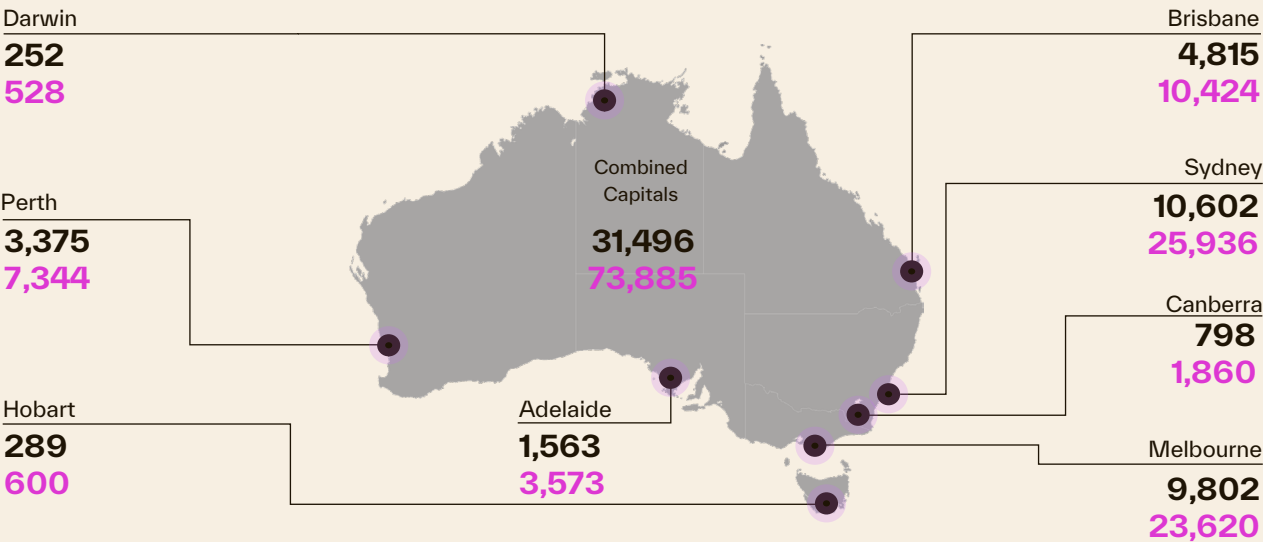
Number of homes for sale, combined capital cities



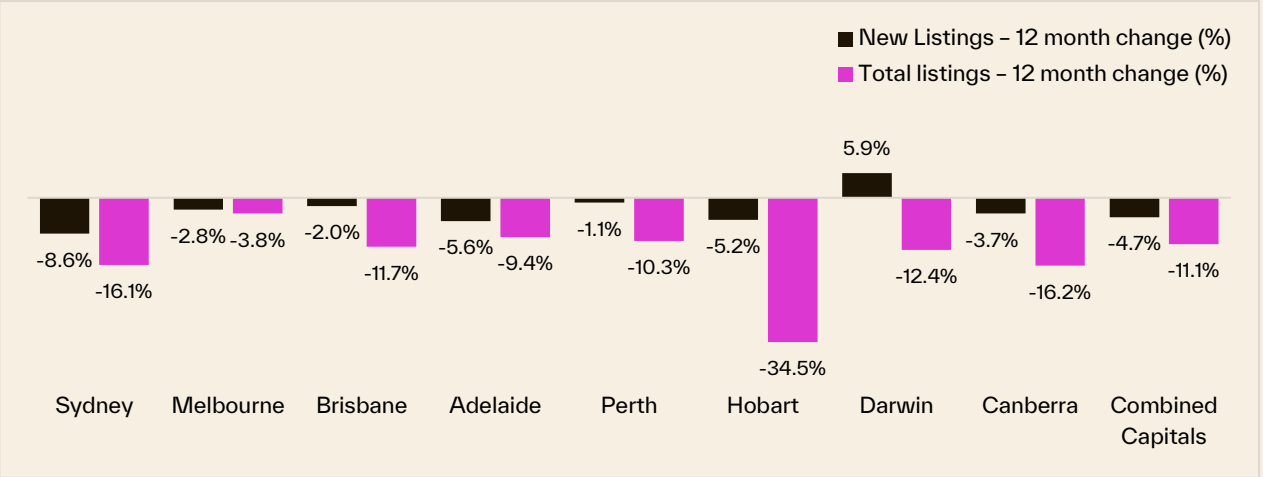
These results are calculated across properties that have been advertised for sale over the 28 days ending 10 August 2025. A new listing is one which has not been previously advertised for sale within 75 days, total listings include new listings and properties which have been previously advertised.

Property Market Indicator Summary

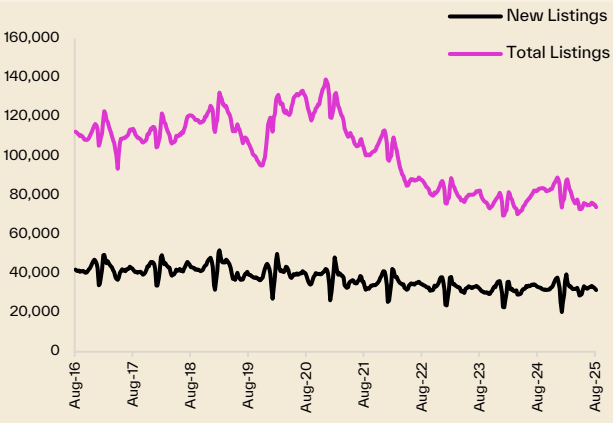
Capital city properties listed for rent – four week count



Rental listings – 12 month change (%)



Number of homes for rent, combined capital cities



Rental snapshot – data to July 2025

Region	Change in rents (all dwellings)				Gross yields (all dwellings)		Vacancy rates (all dwellings)	
	Median rent	Month	Quarter	Annual	Current	12 months ago	Current	12 months ago
Sydney	\$800	0.2%	1.0%	2.4%	3.0%	3.0%	2.0%	2.3%
Melbourne	\$616	0.2%	0.6%	1.1%	3.7%	3.6%	1.5%	1.5%
Brisbane	\$690	0.4%	1.5%	4.6%	3.6%	3.7%	1.9%	2.1%
Adelaide	\$630	0.0%	0.4%	4.4%	3.7%	3.8%	1.0%	1.1%
Perth	\$722	0.2%	0.7%	5.1%	4.2%	4.3%	1.4%	1.6%
Hobart	\$582	-0.2%	0.4%	5.6%	4.4%	4.2%	1.5%	3.1%
Darwin	\$666	1.0%	3.3%	7.3%	6.4%	6.5%	1.6%	1.9%
Canberra	\$680	0.1%	0.4%	2.0%	4.1%	4.0%	1.8%	2.4%
Combined capitals	\$699	0.2%	0.9%	3.0%	3.5%	3.5%	1.7%	1.9%
Combined regionals	\$586	0.3%	1.1%	5.6%	4.4%	4.4%	1.7%	2.1%
National	\$668	0.2%	1.0%	3.7%	3.7%	3.7%	1.7%	1.9%




Property Market Indicator Summary

Top two sales over the past week, states and territories

New South Wales



**128 Hopetoun Avenue
Vaucluse**




 **5**  **3**  **2**

\$9,250,000

Ray White Double Bay



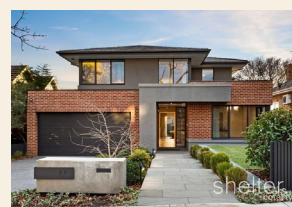
**1 Royston Close
Pymble**

 **6**  **6**  **2**

\$7,580,000

The Marshall Group RE

Victoria

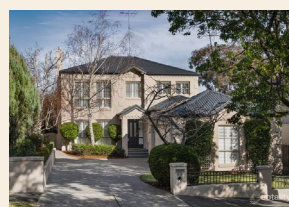


**44 Hortense Street
Glen Iris**

 **4**  **2**  **2**

\$3,860,000

Shelter Real Estate



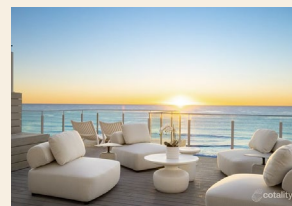
**68 St Helens Road
Hawthorn East**

 **4**  **2**  **2**




\$3,763,000

A-Z Real Estate Agency

Queensland



**2/51-53 Hedges Avenue
Mermaid Beach**

 **6**  **5**  **4**

\$12,300,000

Kollosche



**190 James Street
New Farm**

 **4**  **5**  **4**

\$5,300,000

Sixty Four Property

South Australia



**174 First Avenue
Royston Park**

 **6**  **3**  **1**

\$2,428,000

Pilgrim Real Estate



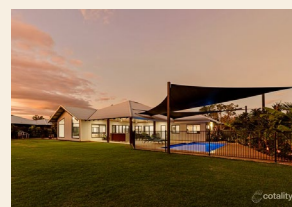
**14 Victoria Street
Henley Beach**

 **4**  **2**  **3**

\$2,400,000

Belle Property Henley Beach

Western Australia



**14 Citana Way
Cable Beach**




 **5**  **2**  **4**

\$2,050,000

Ray White Broome



**2/1 Drew Road
Ardross**

 **3**  **2**  **2**

\$1,850,000

Realmark Urban

Property Market Indicator Summary

Top two sales over the past week, states and territories

Tasmania



2 Old Punt Road
Perth

4 2 3

\$1,200,000

Kennedy & Hunt Real Estate



35 River Street
Bellerive

4 2 0

\$1,186,000

Harcourts Signature - Rosny Park

Northern Territory



7 Orchard Road
Coconut Grove

4 2 2

\$1,170,000

Nick Mousellis Real Estate - Eview Group



9 Exmouth Court
Leanyer

4 3 2

\$886,200

Ray White Darwin

Australian Capital Territory



4 Radburn Street
Taylor

5 4 2

\$1,840,000

Stone Real Estate Gungahlin



5 Macpherson Street
O'Connor

3 1 2

\$1,525,000

Edge Real Estate - Pearce

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