

# Property Market Indicator Summary

All data to week ending 31 August 2025

## Preliminary clearance rate continues to trend higher across combined capitals

Auction activity has picked up as we lead into spring, with 2,251 homes taken under the hammer last week, a 9.0% lift on the week prior and the highest number of auctions held since the first week of June (2,918).

The preliminary clearance rate has also continued trending higher, reaching 76.3% last week across the combined capitals. This is a full percentage point higher than the previous week prior (75.3%), which, once finalised (70.0%), was the highest final clearance rate since Feb 2024.

In Melbourne, 1,124 homes were taken to auction last week, up 14.1% from the week prior. The preliminary auction clearance rate slipped a little, coming in at 74.9% compared with 75%+ early success rates recorded over the prior two weeks.

There were 825 auctions held in Sydney last week, up 13.2% on the week prior to be the highest weekly volume since mid-June (829). The preliminary clearance rate broke the 80% mark for the first time since April 2024, coming in at 80.3%.

While down 26.6% from the week prior, Brisbane led the smaller capitals for auction volume, with 124 homes going under the hammer last week. The preliminary clearance rate rose to 64.5%, up from 60.8% a week earlier.

Last week, 106 homes went to auction in Adelaide, a 7.1% rise compared with the week prior. Based on results collected so far, 75.0% have reported a successful outcome.

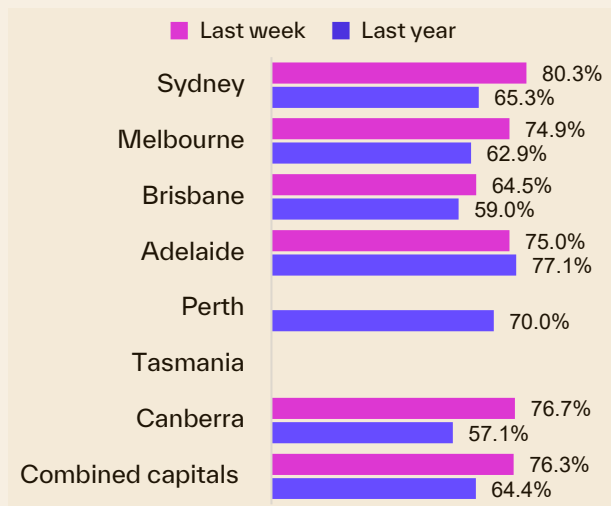
There were 63 auctions held in the ACT last week, down 16.0% on the previous week. So far, 76.7% of reported auctions have sold.

In Perth, three of the five auction results collected so far were successful, while the one auction result reported in Tasmania last week was passed in.

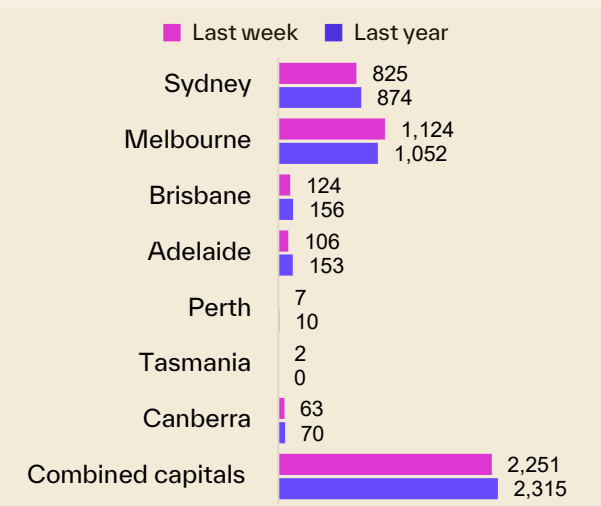
Auction activity is set to reduce a little this week, with around 2,150 auction events currently scheduled across the combined capitals, before rising to about 2,400 next week.

## Capital City Auction Statistics (Preliminary)

Clearance rate



Total auctions



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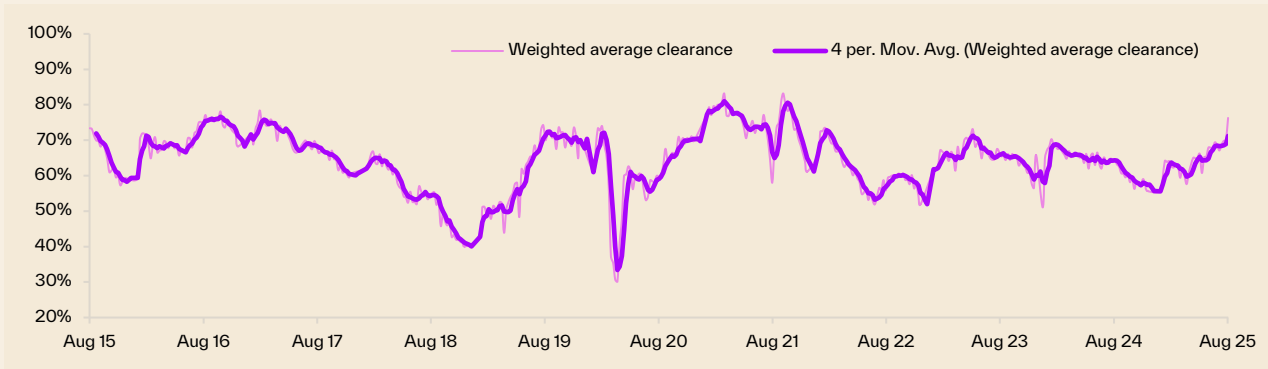
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## Capital City Auction Statistics (Preliminary)

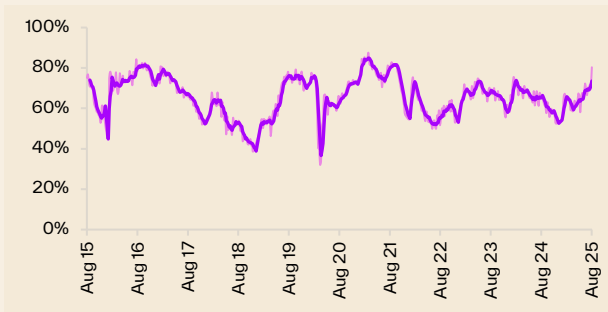
| City              | Clearance rate | Total auctions | Cotality auction results | Cleared auctions | Uncleared auctions |
|-------------------|----------------|----------------|--------------------------|------------------|--------------------|
| Sydney            | 80.3%          | 825            | 636                      | 511              | 125                |
| Melbourne         | 74.9%          | 1,124          | 826                      | 619              | 207                |
| Brisbane          | 64.5%          | 124            | 93                       | 60               | 33                 |
| Adelaide          | 75.0%          | 106            | 56                       | 42               | 14                 |
| Perth             | n.a.           | 7              | 5                        | 3                | 2                  |
| Tasmania          | n.a.           | 2              | 1                        | 0                | 1                  |
| Canberra          | 76.7%          | 63             | 43                       | 33               | 10                 |
| Combined capitals | 76.3%          | 2,251          | 1,660                    | 1,266            | 394                |

## Weekly clearance rates

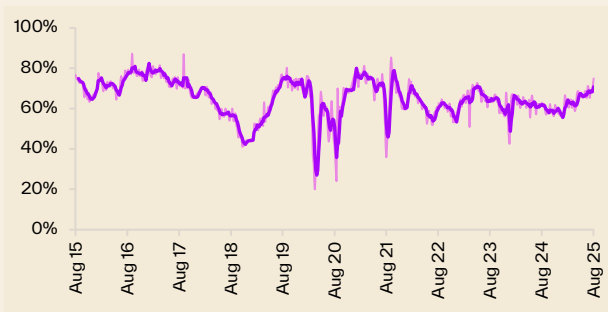
Combined capital cities



Sydney



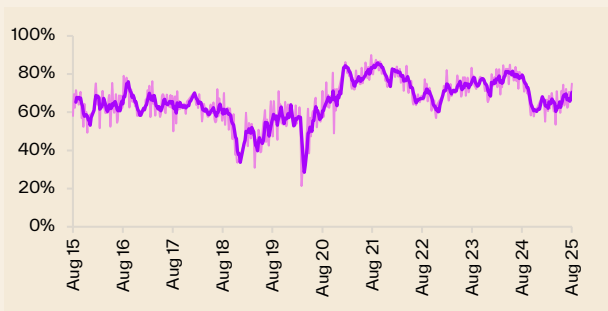
Melbourne



Brisbane



Adelaide



# Property Market Indicator Summary

## Sub-region auction statistics (Preliminary)

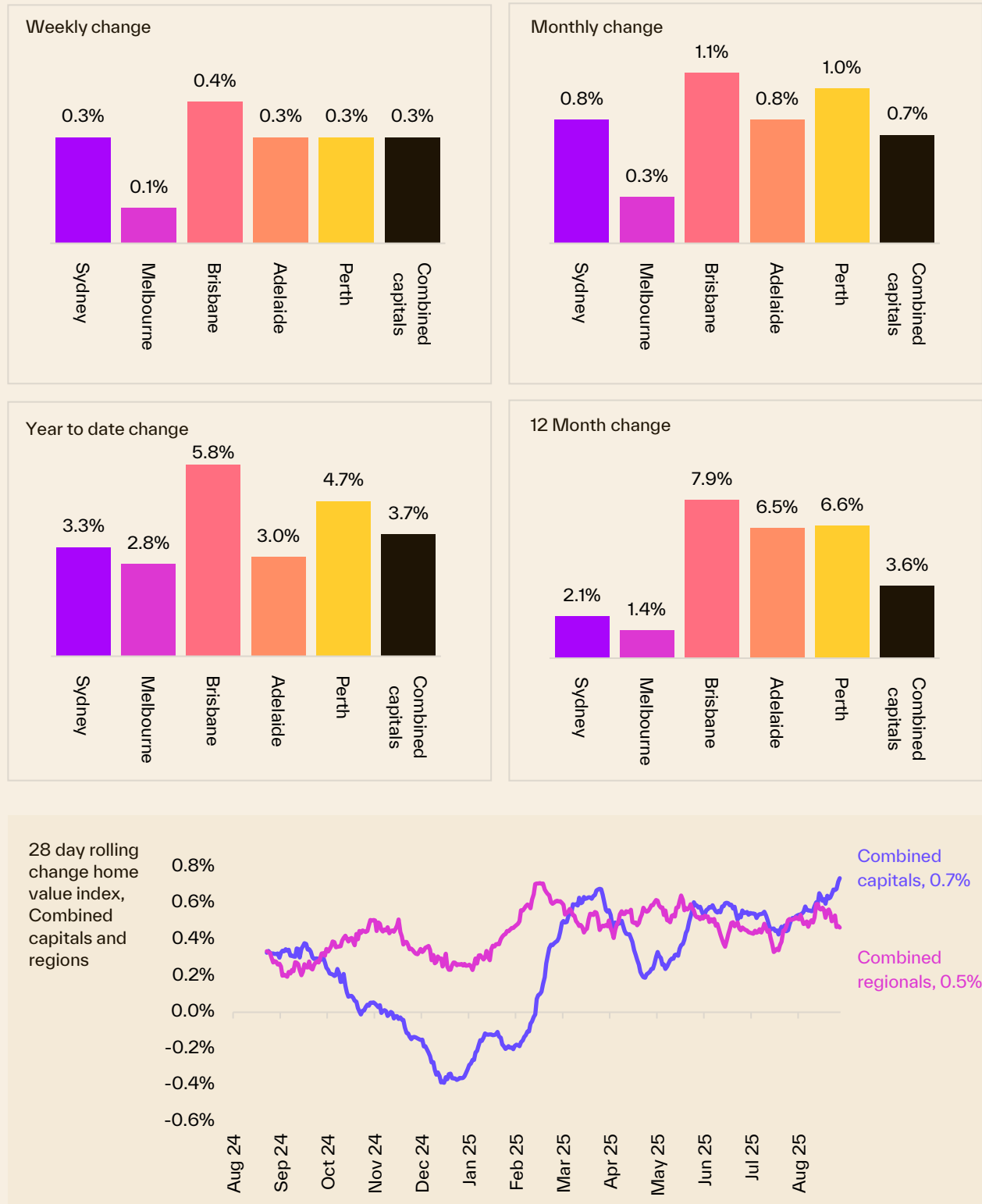
| Region                        | Clearance rate | Total auctions | Collected results | Cleared auctions | Uncleared auctions |
|-------------------------------|----------------|----------------|-------------------|------------------|--------------------|
| Sydney sub-regions            |                |                |                   |                  |                    |
| Central Coast                 | 81.8%          | 20             | 11                | 9                | 2                  |
| Baulkham Hills and Hawkesbury | 90.0%          | 32             | 20                | 18               | 2                  |
| Blacktown                     | 78.6%          | 65             | 28                | 22               | 6                  |
| City and Inner South          | 75.3%          | 85             | 77                | 58               | 19                 |
| Eastern Suburbs               | 79.3%          | 93             | 87                | 69               | 18                 |
| Inner South West              | 88.5%          | 73             | 61                | 54               | 7                  |
| Inner West                    | 83.1%          | 71             | 59                | 49               | 10                 |
| North Sydney and Hornsby      | 75.2%          | 131            | 109               | 82               | 27                 |
| Northern Beaches              | 86.1%          | 47             | 43                | 37               | 6                  |
| Outer South West              | n.a.           | 11             | 5                 | 4                | 1                  |
| Outer West and Blue Mountains | n.a.           | 8              | 8                 | 4                | 4                  |
| Parramatta                    | 81.0%          | 61             | 42                | 34               | 8                  |
| Ryde                          | 74.4%          | 57             | 39                | 29               | 10                 |
| South West                    | 88.0%          | 41             | 25                | 22               | 3                  |
| Sutherland                    | 91.3%          | 31             | 23                | 21               | 2                  |
| Melbourne sub-regions         |                |                |                   |                  |                    |
| Inner                         | 71.5%          | 182            | 137               | 98               | 39                 |
| Inner East                    | 71.8%          | 154            | 110               | 79               | 31                 |
| Inner South                   | 76.0%          | 177            | 121               | 92               | 29                 |
| North East                    | 75.5%          | 134            | 98                | 74               | 24                 |
| North West                    | 74.2%          | 105            | 89                | 66               | 23                 |
| Outer East                    | 78.3%          | 89             | 60                | 47               | 13                 |
| South East                    | 75.7%          | 99             | 70                | 53               | 17                 |
| West                          | 76.8%          | 164            | 125               | 96               | 29                 |
| Mornington Peninsula          | 87.5%          | 20             | 16                | 14               | 2                  |
| Regional SA4                  |                |                |                   |                  |                    |
| Newcastle and Lake Macquarie  | 76.5%          | 22             | 17                | 13               | 4                  |
| Illawarra                     | 33.3%          | 13             | 12                | 4                | 8                  |
| Gold Coast                    | 51.1%          | 56             | 47                | 24               | 23                 |
| Sunshine Coast                | 63.2%          | 33             | 19                | 12               | 7                  |
| Geelong                       | 53.3%          | 17             | 15                | 8                | 7                  |

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

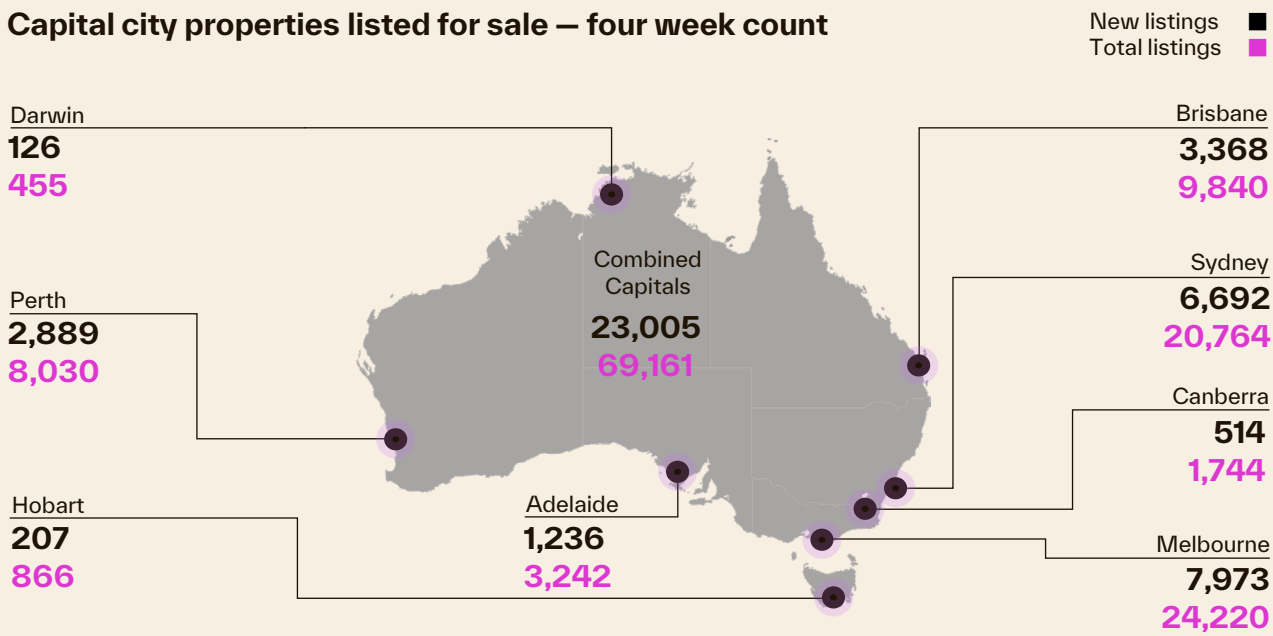


Results are based on the Cotality Daily Home Value Index. Further information and daily updates on the index results are available from <https://www.cotality.com/au/our-data/indices>.

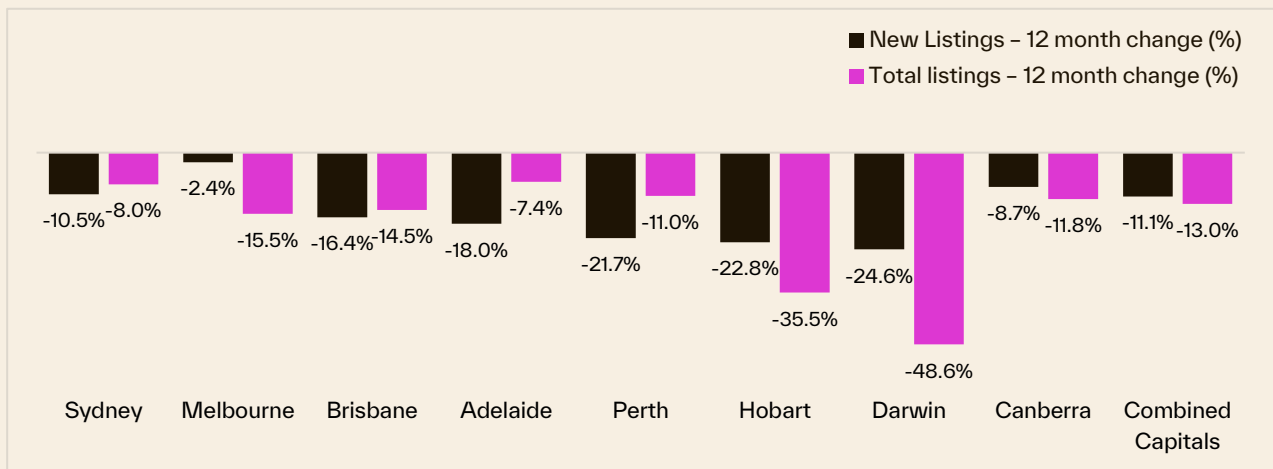
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# Property Market Indicator Summary

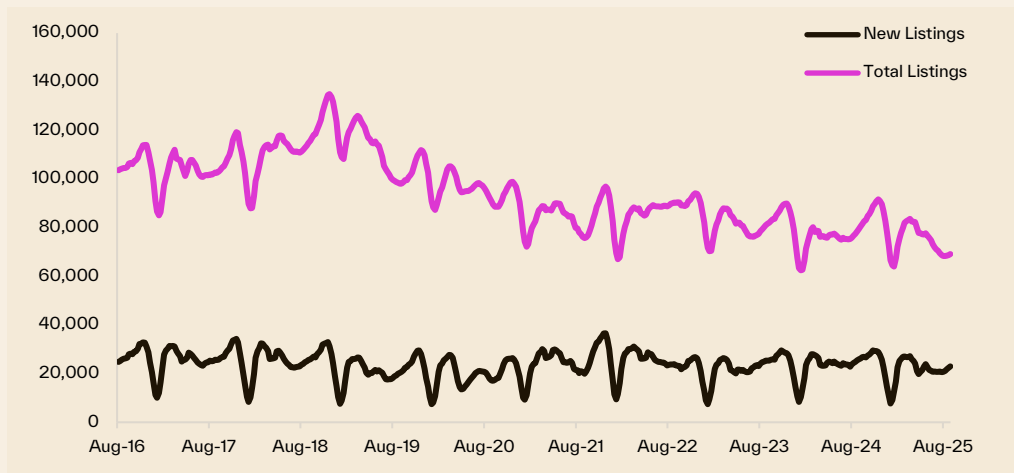
## Capital city properties listed for sale – four week count



## Listings – 12 month change (%)



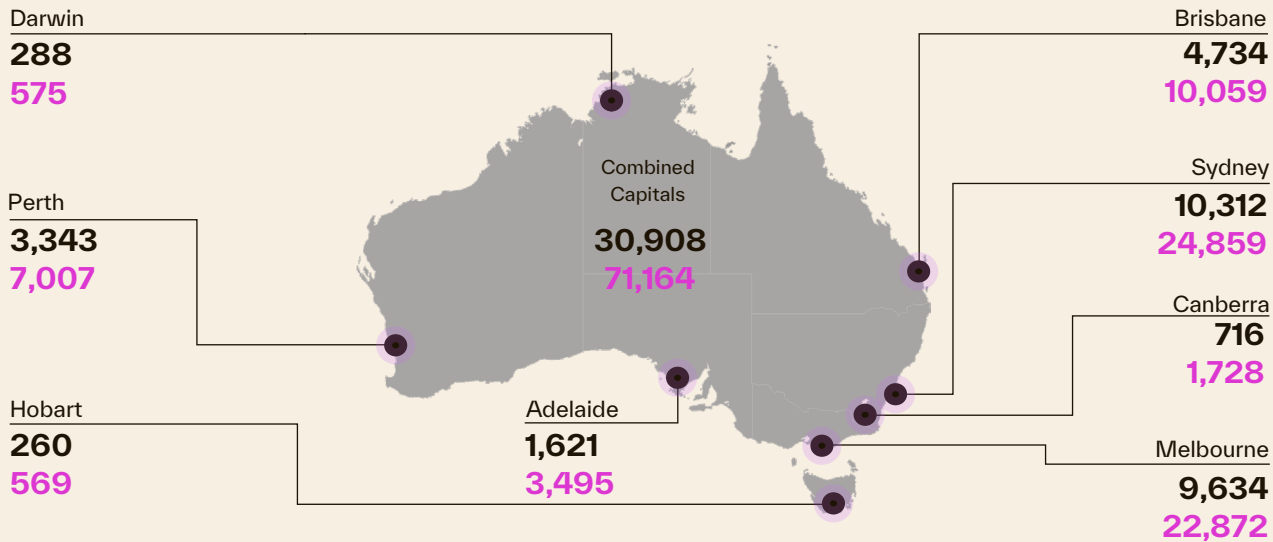
## Number of homes for sale, combined capital cities



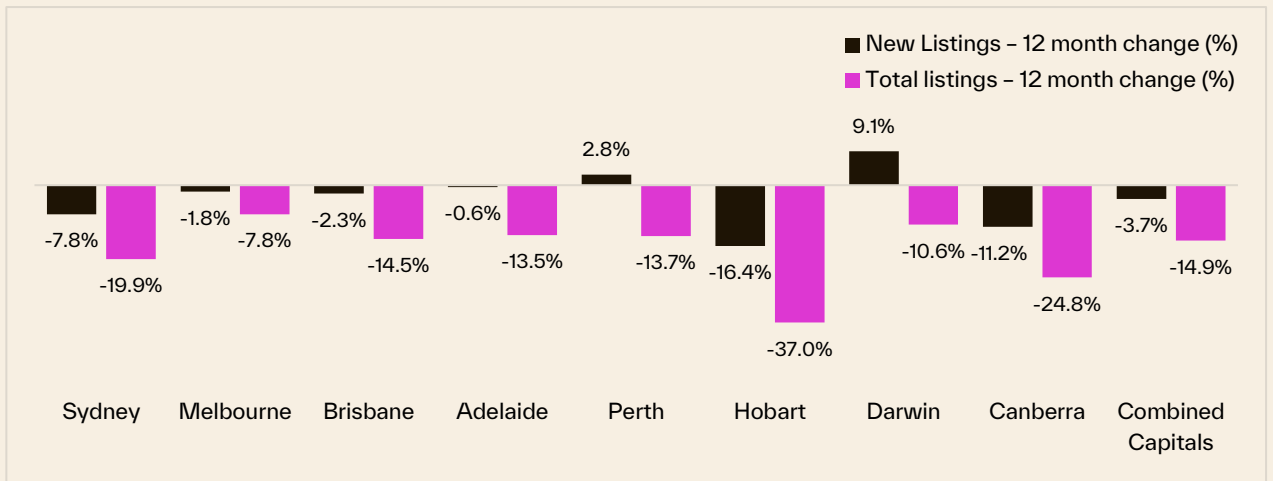
These results are calculated across properties that have been advertised for sale over the 28 days ending 31 August 2025. A new listing is one which has not been previously advertised for sale within 75 days, total listings include new

# Property Market Indicator Summary

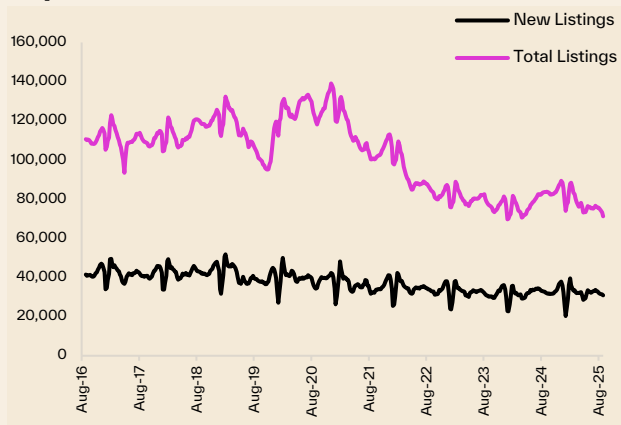
## Capital city properties listed for rent – four week count



## Rental listings – 12 month change (%)



## Number of homes for rent, combined capital cities



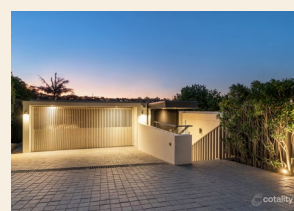
## Rental snapshot – data to August 2025

| 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             | \$801                           | 0.3%  | 0.7%    | 3.1%   | 3.0%                         | 3.0%          | 1.7%                          | 2.4%          |
| Melbourne          | \$615                           | 0.2%  | 0.5%    | 1.2%   | 3.7%                         | 3.6%          | 1.4%                          | 1.6%          |
| Brisbane           | \$693                           | 0.6%  | 1.5%    | 5.3%   | 3.6%                         | 3.7%          | 1.7%                          | 2.1%          |
| Adelaide           | \$632                           | 0.2%  | 0.4%    | 4.2%   | 3.7%                         | 3.7%          | 0.9%                          | 1.2%          |
| Perth              | \$725                           | 0.4%  | 0.8%    | 5.4%   | 4.2%                         | 4.2%          | 1.2%                          | 1.6%          |
| Hobart             | \$583                           | 0.5%  | 0.9%    | 6.2%   | 4.4%                         | 4.3%          | 1.3%                          | 3.0%          |
| Darwin             | \$672                           | 1.0%  | 3.9%    | 7.6%   | 6.5%                         | 6.6%          | 1.7%                          | 2.0%          |
| Canberra           | \$681                           | 0.3%  | 0.7%    | 2.6%   | 4.1%                         | 4.0%          | 1.6%                          | 2.7%          |
| Combined capitals  | \$700                           | 0.3%  | 0.8%    | 3.4%   | 3.5%                         | 3.5%          | 1.5%                          | 2.0%          |
| Combined regionals | \$587                           | 0.3%  | 1.0%    | 5.8%   | 4.4%                         | 4.4%          | 1.5%                          | 2.1%          |
| National           | \$669                           | 0.3%  | 0.9%    | 4.1%   | 3.7%                         | 3.7%          | 1.5%                          | 2.0%          |




# Property Market Indicator Summary

## Top two sales over the past week, states and territories

### New South Wales

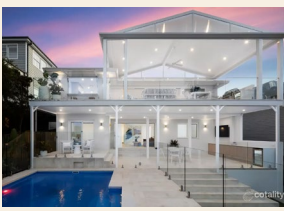


**34A Gordon Street  
Mosman**




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

**\$13,500,000**

*Ray White Lower North Shore Group*



**29 Hay Street  
Collaroy**

 **5**  **3**  **0**


**\$6,550,000**

*Cunninghams Property*

### Victoria

**Image not  
available**

**19 Elaroo Avenue  
Camberwell**



 **4**  **2**  **1**

**\$3,880,000**

*Jellis Craig Hawthorn*



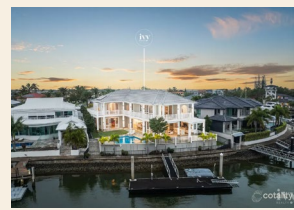
**1 Leach Avenue  
Box Hill North**

 **5**  **5**  **2**



**\$3,326,000**

*McGrath*

### Queensland



**1 Royal Mews  
Sovereign Islands**



 **4**  **4**  **11**

**\$6,900,000**

*Amir Prestige Paradise Point*



**83 Admiralty Drive  
Paradise Waters**

 **5**  **5**  **0**

**\$5,995,000**

*Kollosche*

### South Australia



**5 Bowman Avenue  
Kensington Park**

 **5**  **2**  **2**

**\$2,010,000**

*Harris Real Estate Kent Town*




**2 Clyde Avenue  
Lockleys**

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




**\$1,930,000**

*Ray White Henley Beach*

### Western Australia




**54 Challenger Parade  
City Beach**




 **4**  **2**  **1**

**\$6,050,000**

*Shore Property*



**14 Allenby Road  
Dalkeith**

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

**\$4,325,000**

*William Porteous Properties International*



# Property Market Indicator Summary

## Top two sales over the past week, states and territories

### Tasmania



**10 Jetty Road  
Cygnet**

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

**\$1,500,000**

*Homelands Property | Huonville*



**179 Guys Road  
Cygnet**

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

**\$1,260,000**

*Homelands Property | Cygnet*

### Northern Territory



**65 Menaja Road  
Howard Springs**

 **3**  **2**  **6**

**\$970,000**

*Laurence Real Estate*




**82 Thorne Street  
Muirhead**

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



**\$849,000**

*Billy Nida Realty*

### Australian Capital Territory



**17 Hodgkinson Street  
Griffith**



 **6**  **3**  **0**

**\$3,400,000**

*Blackshaw Manuka*



**34 Asimus Avenue  
Strathnairn**

 **6**  **4**  **4**

**\$1,765,000**

*Marq Property*

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# Property Market Indicator Summary

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