

# Property Market Indicator Summary

All data to week ending 7 December 2025

## Preliminary auction clearance rate continues to ease

The capital city preliminary auction clearance rate continued its easing trend that has been evident since mid-September, falling 4.7 percentage points to 63.5% last week, the lowest since the same time last year (62.4%).

The volume of capital city auctions also trended lower, down 5.5% from the previous week, with 3,238 homes going under the hammer last week. The number of auctions will cool further as we approach the festive season, with around 2,880 homes scheduled for auction this week, before dropping sharply to around 1,200 auctions over the week ending December 21. Auction activity is likely to remain low until early February.

1,646 homes were auctioned across Melbourne last week, in-line with the week prior (1,643). The preliminary clearance rate came in at 65.5%, down 3.1 percentage points to be the lowest early clearance rate since the last week of September (which coincided with the Melbourne Cup Racing Carnival).

Sydney hosted 1,100 auctions last week, 11.9% fewer than the week prior. The preliminary clearance rate

eased by 3.7 percentage points, coming in at 61.5%, the lowest since the week ending June 8<sup>th</sup> earlier this year (59.9%).

188 homes were auctioned in Brisbane last week, down 10% on the week prior. The preliminary clearance rate fell sharply, down 16.8 percentage points to 54.7%, the lowest since the first week of May earlier this year.

There were 163 auctions held in Adelaide last week, down 12.8% relative to the week prior. The preliminary clearance rate fell 14.3 percentage points to 70.9%.

Of the 110 auctions held in ACT last week, 55.7% have reported a successful result so far, down 9.7 percentage points from the previous week, marking the lowest early clearance rate since the week ending June 22 earlier this year.

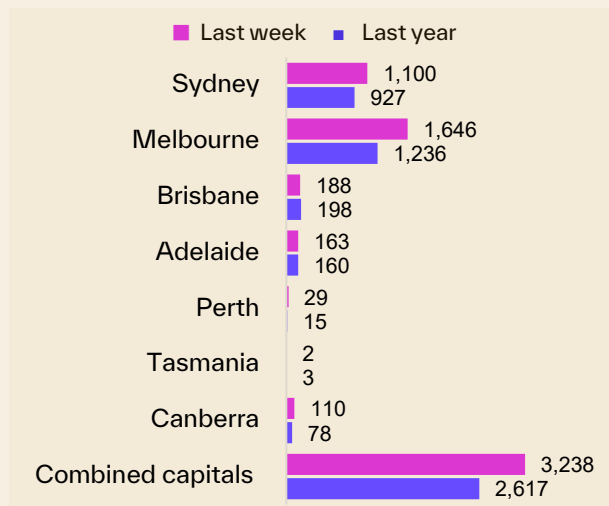
29 homes were auctioned in Perth last week with a preliminary clearance rate of 64.3%, while only two auctions were held in Tasmania, both of which were successful.

## Capital City Auction Statistics (Preliminary)

Clearance rate



Total auctions



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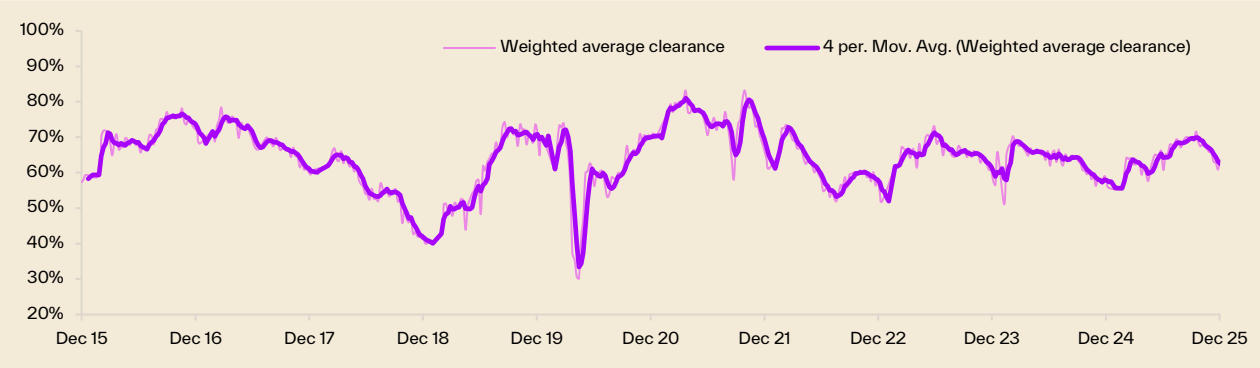
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## Capital City Auction Statistics (Preliminary)

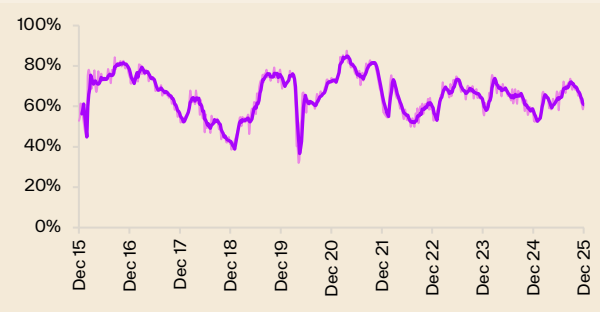
City	Clearance rate	Total auctions	Cotality auction results	Cleared auctions	Uncleared auctions
Sydney	61.5%	1,100	845	520	325
Melbourne	65.5%	1,646	1,215	796	419
Brisbane	54.7%	188	139	76	63
Adelaide	70.9%	163	103	73	30
Perth	64.3%	29	14	9	5
Tasmania	n.a.	2	2	2	0
Canberra	55.7%	110	79	44	35
Combined capitals	63.5%	3,238	2,397	1,522	875

## Weekly clearance rates

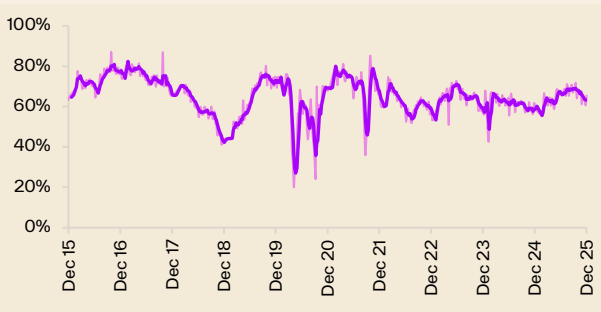
Combined capital cities



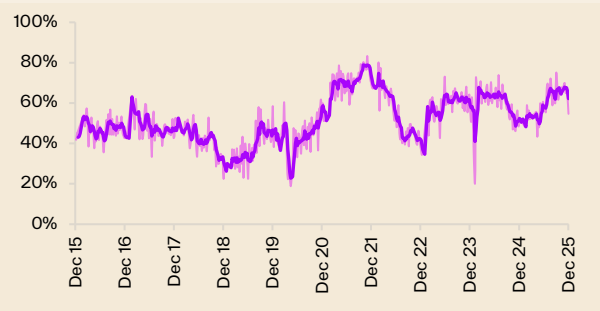
Sydney



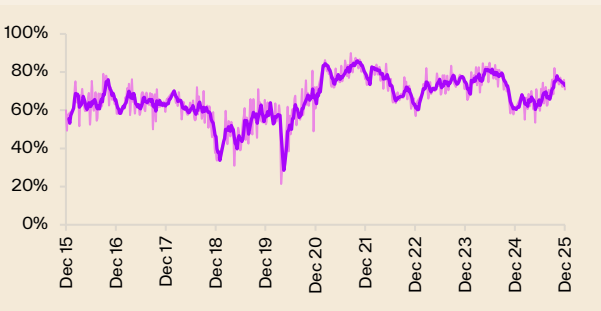
Melbourne



Brisbane



Adelaide



# Property Market Indicator Summary

## Sub-region auction statistics (Preliminary)

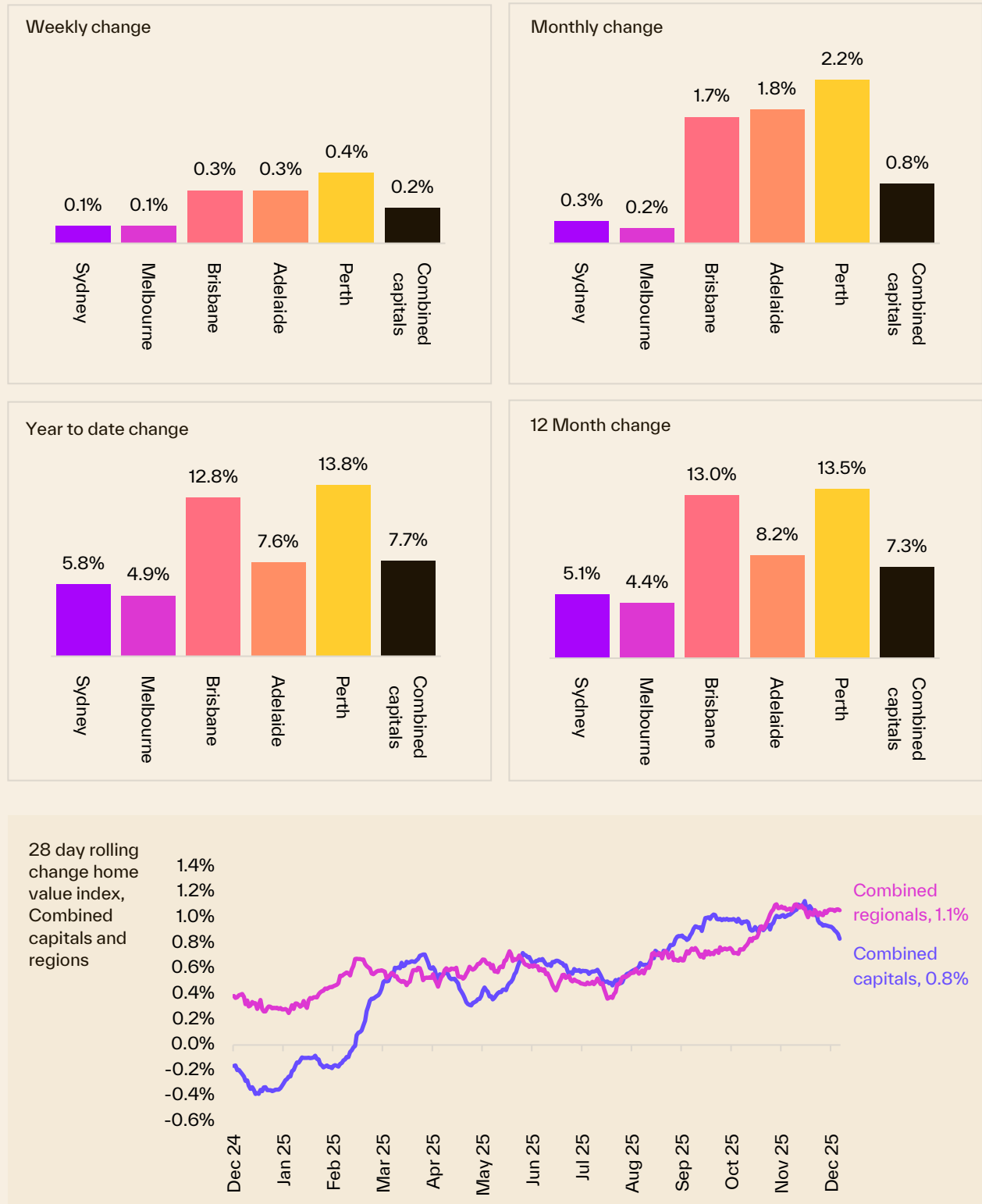
Region	Clearance rate	Total auctions	Collected results	Cleared auctions	Uncleared auctions
Sydney sub-regions					
Central Coast	64.3%	28	14	9	5
Baulkham Hills and Hawkesbury	46.2%	44	26	12	14
Blacktown	67.9%	49	28	19	9
City and Inner South	61.0%	108	100	61	39
Eastern Suburbs	61.9%	114	105	65	40
Inner South West	70.3%	123	91	64	27
Inner West	63.0%	99	81	51	30
North Sydney and Hornsby	56.6%	167	122	69	53
Northern Beaches	53.1%	77	64	34	30
Outer South West	n.a.	6	5	3	2
Outer West and Blue Mountains	53.3%	17	15	8	7
Parramatta	58.9%	104	73	43	30
Ryde	73.5%	49	34	25	9
South West	51.4%	55	37	19	18
Sutherland	76.0%	60	50	38	12
Melbourne sub-regions					
Inner	60.5%	290	223	135	88
Inner East	58.5%	202	135	79	56
Inner South	67.7%	266	189	128	61
North East	67.9%	190	140	95	45
North West	70.2%	162	131	92	39
Outer East	75.0%	114	80	60	20
South East	72.5%	192	131	95	36
West	58.9%	198	158	93	65
Mornington Peninsula	67.9%	32	28	19	9
Regional SA4					
Newcastle and Lake Macquarie	70.0%	41	30	21	9
Illawarra	69.6%	25	23	16	7
Gold Coast	47.2%	86	72	34	38
Sunshine Coast	55.3%	46	38	21	17
Geelong	64.3%	20	14	9	5

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

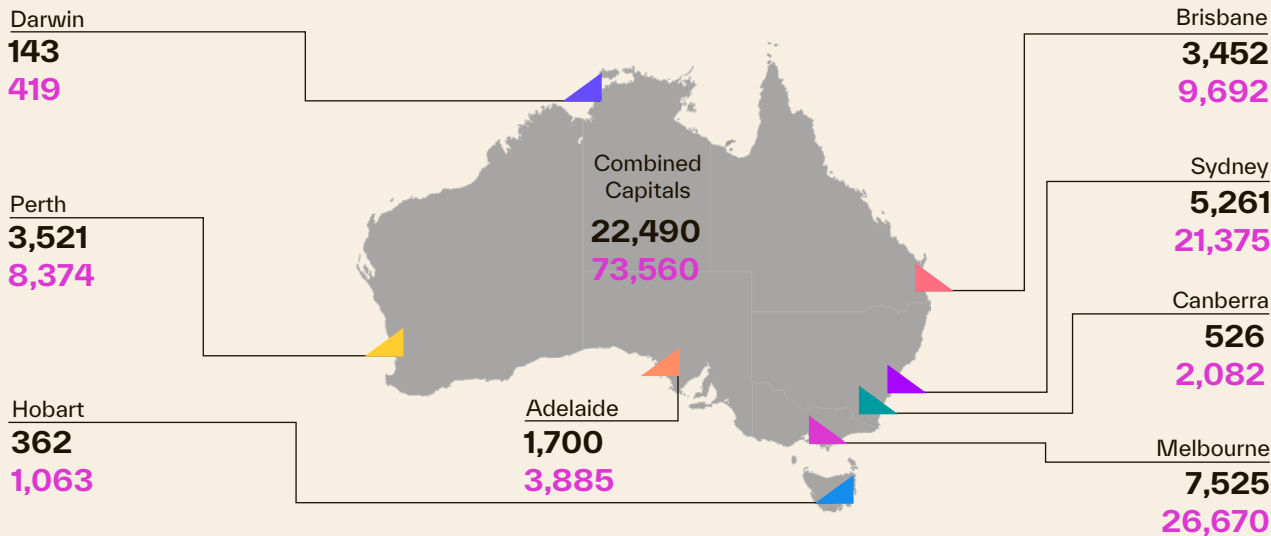


Results are based on the Cotality Daily Home Value Index. Further information and daily updates on the index results are available from <https://www.cotality.com/au/our-data/indices>.

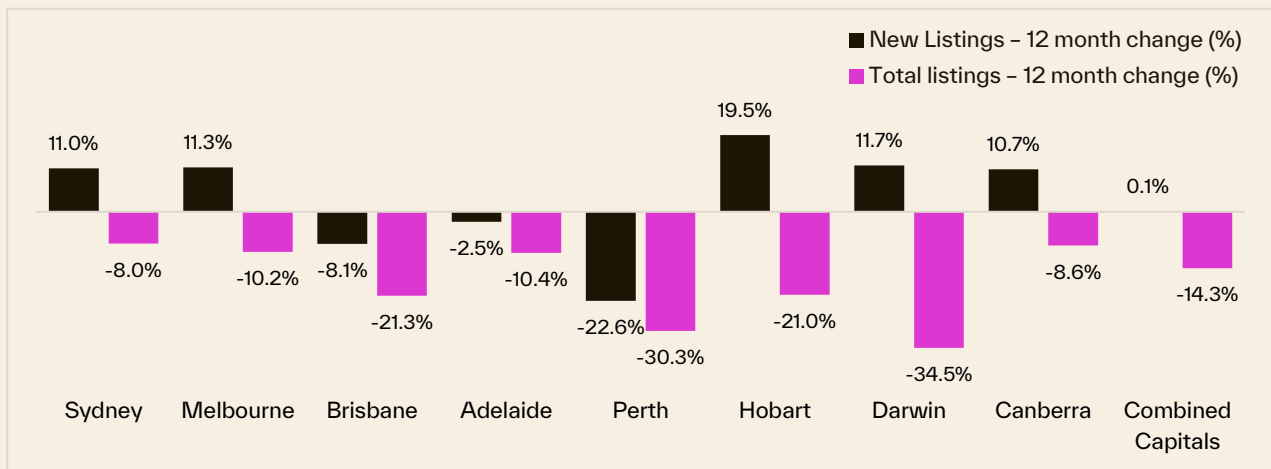
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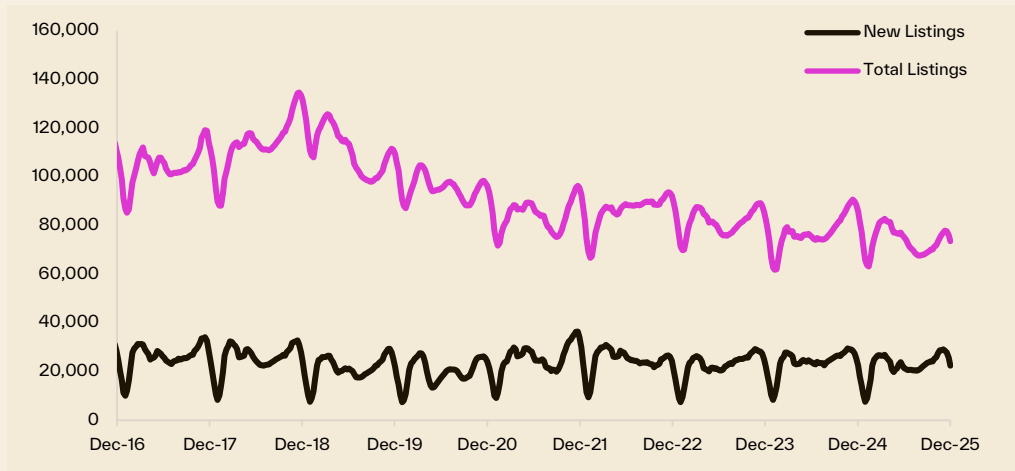
## Capital city properties listed for sale – four week count



## Listings – 12 month change (%)



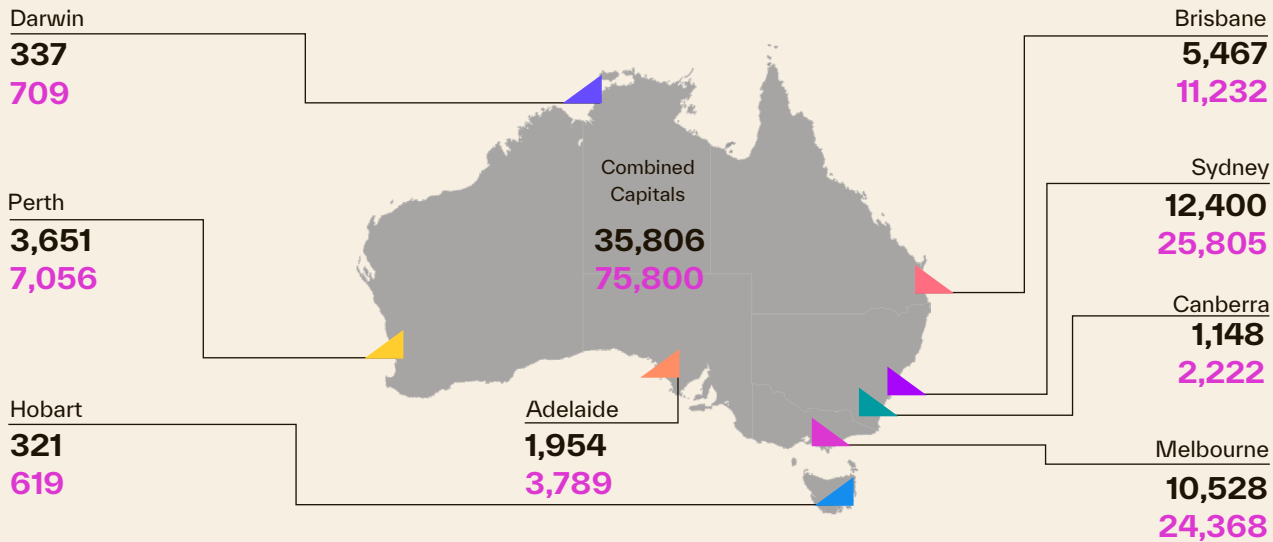
## Number of homes for sale, combined capital cities



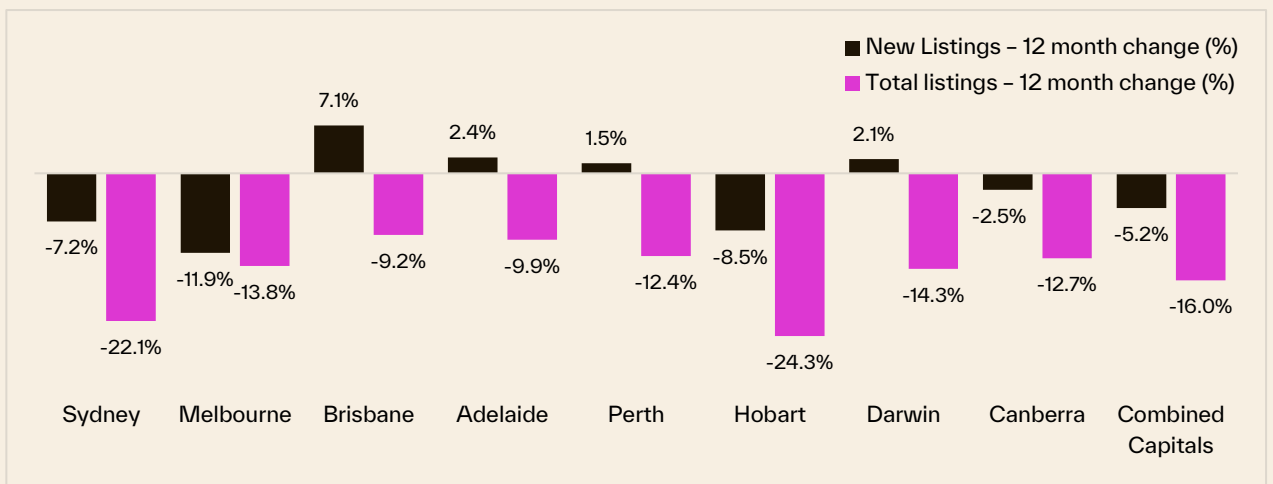
These results are calculated across properties that have been advertised for sale over the 28 days ending 07 December 2025. A new listing is one which has not been previously advertised for sale within 75 days, total listings include new

# Property Market Indicator Summary

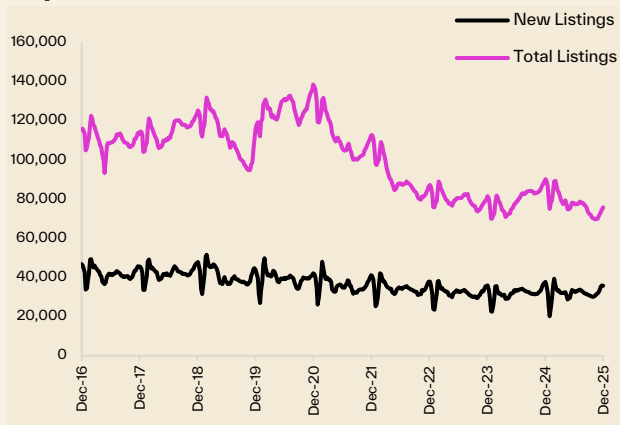
## Capital city properties listed for rent – four week count



## Rental listings – 12 month change (%)



## Number of homes for rent, combined capital cities




## Rental snapshot – data to November 2025

Region	Median rent	Change in rents (all dwellings)			Gross yields (all dwellings)		Vacancy rates (all dwellings)	
		Month	Quarter	Annual	Current	12 months ago	Current	12 months ago
Sydney	\$816	0.6%	1.6%	4.7%	3.0%	3.0%	1.6%	2.3%
Melbourne	\$620	0.3%	0.7%	2.3%	3.6%	3.6%	1.4%	1.7%
Brisbane	\$703	0.4%	1.1%	6.2%	3.4%	3.6%	1.8%	2.1%
Adelaide	\$633	0.3%	0.4%	3.5%	3.5%	3.7%	0.9%	1.1%
Perth	\$739	0.5%	1.5%	5.9%	3.9%	4.2%	1.1%	1.3%
Hobart	\$595	0.8%	1.9%	6.8%	4.3%	4.2%	1.2%	2.1%
Darwin	\$692	0.3%	2.3%	8.6%	6.3%	6.8%	2.2%	2.8%
Canberra	\$680	0.3%	0.4%	3.2%	4.0%	4.0%	1.6%	2.2%
Combined capitals	\$709	0.5%	1.2%	4.5%	3.4%	3.5%	1.5%	1.9%
Combined regionals	\$597	0.6%	1.5%	6.2%	4.3%	4.4%	1.4%	1.9%
National	\$679	0.5%	1.3%	5.0%	3.6%	3.7%	1.5%	1.9%

# Property Market Indicator Summary

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

### New South Wales




64 Bellevue Road  
Bellevue Hill

6 6 3

**\$17,200,000**

Ray White Double Bay



3 Little Edward Street  
Balmain

5 2 0

**\$10,700,000**

Belle Property Balmain

### Victoria



37 Denham Street  
Hawthorn

6 3 2

**\$5,800,000**

Marshall White Boroondara




37 Mccracken Avenue  
Northcote

4 2 0

**\$3,670,000**

Jellis Craig Northcote

### Queensland

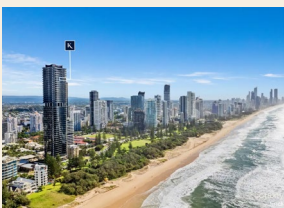


Lot7/3519 Main Beach Pde  
Main Beach

2 3 3

**\$9,500,000**

Kollosche




3901/272 Hedges Avenue  
Mermaid Beach

3 3 0

**\$8,000,000**

Kollosche

### South Australia




66 Ben Loman Road  
Coromandel East

6 3 8

**\$3,010,000**

Ray White Mount Barker



6 Finlayson Street  
Grange

7 3 0

**\$2,430,000**

Noakes Nickolas

### Western Australia



103 Victoria Avenue  
Dalkeith

5 2 2

**\$3,450,000**

Acton | Belle Property Dalkeith



7 Bateman Street  
Mosman Park

4 3 2

**\$3,322,000**

Acton | Belle Property Cottesloe

# Property Market Indicator Summary

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

### Tasmania



3207 Channel Highway  
Woodbridge

 4  2  2

**\$4,250,000**

*Harcourts Huon Valley*



4 Kirval Court  
West Hobart

 4  2  1

**\$1,250,000**

*Stone Real Estate Southern Tasmania*

### Northern Territory



20 May Street  
Parap

 4  2  2

**\$1,250,000**

*Ray White Bayside*



68 Namarluk Drive  
Ludmilla

 4  2  1

**\$940,000**

*Laurence Real Estate*

### Australian Capital Territory



1 Weld Street  
Yarralumla

 3  2  2

**\$1,910,000**

*Hive Property*



3 Gillies Street  
Curtin

 5  3  3

**\$1,720,000**

*Home.Byholly*

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