cotality™

Property Market Indicator Summary

All data to week ending 26 October 2025

Busiest auction week since March last year

Last week saw the combined capital city's preliminary auction clearance rate slump to its lowest level since mid-June, coming in at 70.5%. An easing in the preliminary auction clearance trend has been evident since late September, following a cyclical high of 77.9% over the week ending September 21st. Despite this, the preliminary clearance rate has held above the decade average of 68.5% and has consistently held above the 70% mark since mid-June.

The lower clearance rate has occurred against rising volumes. The number of auctions held last week, at 3,253, was the combined capital's highest since the week ending March 24th, 2024. The number of auctions scheduled this week is set to drop sharply to around 2,200 as Melbourne pauses for the Spring Racing Carnival. Auction volumes are set to bounce back next week with around 3,200 homes currently scheduled for auction over the week ending November 9.

Melbourne had a huge week of auctions, with 1,835 homes taken under the hammer last week. This was the city's highest weekly volume of auctions since December 2021 at the height of the pandemic housing boom. Melbourne's preliminary clearance rate eased back to 71.8%, the city's lowest in three weeks, but is still well above the decade average of 68.7%. Less than 500 homes are scheduled for auction this week in Melbourne due to the Spring Racing Carnival.

Last week, 959 homes were taken to auction in Sydney, down from 1,079 a week earlier. Sydney's preliminary clearance rate dropped back to 68.2% last week, the lowest since the week ending June 8th earlier this year and marks the first time the preliminary clearance rate has been below the 70% mark in 21 weeks. The number of auctions is set to bounce higher across Sydney this week, with around 1,200 homes scheduled to go under the hammer.

Brisbane hosted 190 auctions last week, down from 200 the week prior. So far, 73.5% of auctions have reported a successful result, the city's highest early clearance rate in six weeks.

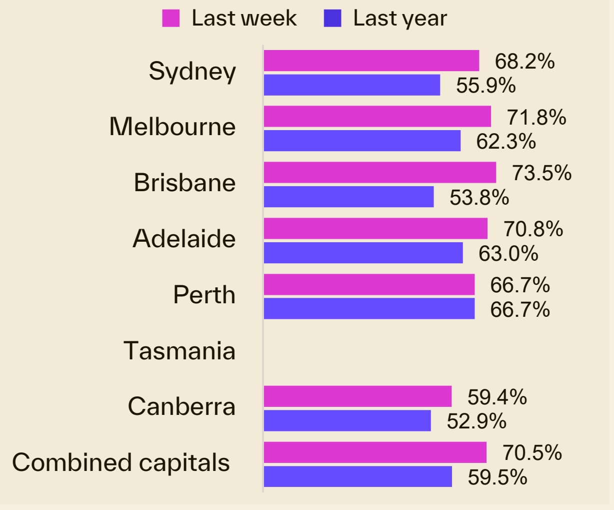
There were 159 homes auctioned in Adelaide last week, with 70.8% reporting a positive result based on the collection to-date — Adelaide's lowest preliminary clearance rate in eleven weeks.

Last week saw 88 auctions held across the ACT, down from 103 the week prior. So far, only 59.4% of auctions have reported a successful result, the territory's lowest preliminary clearance rate since the week ending June 22, 2025.

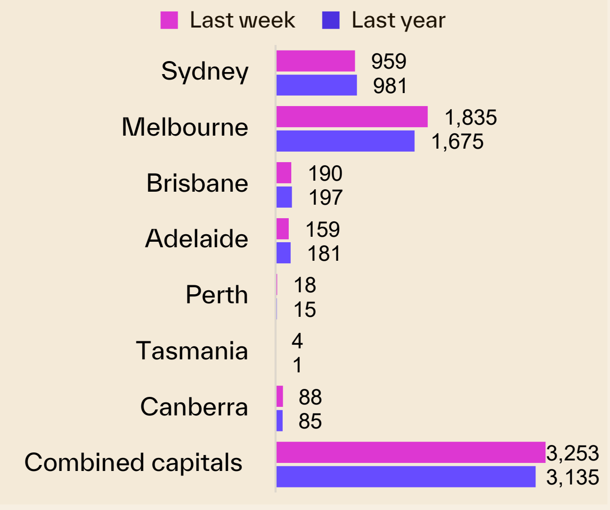
So far, eight of the 12 auction results reported in Perth were successful, while the two results reported in Tasmania were also successful.

Capital City Auction Statistics (Preliminary)

Clearance rate



Total auctions



Media enquiries: media@cotality.com

cotality™

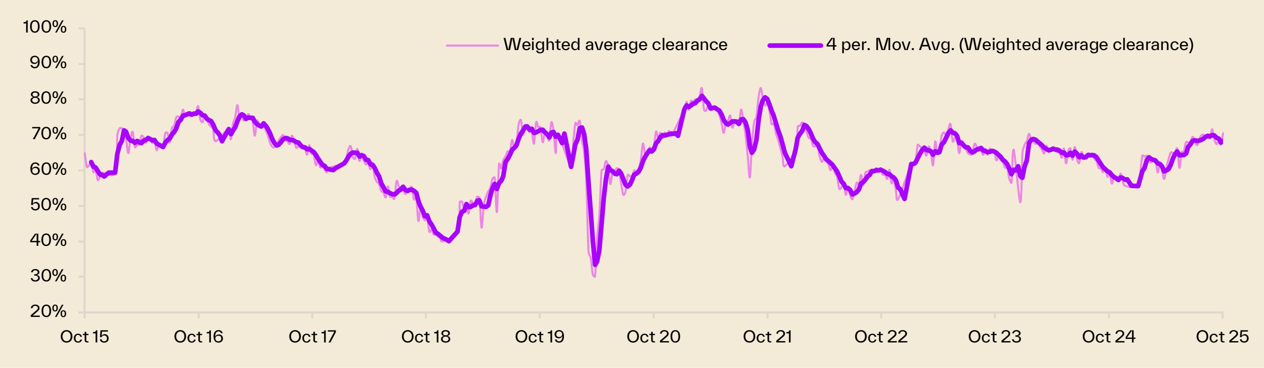
Property Market Indicator Summary

Capital City Auction Statistics (Preliminary)

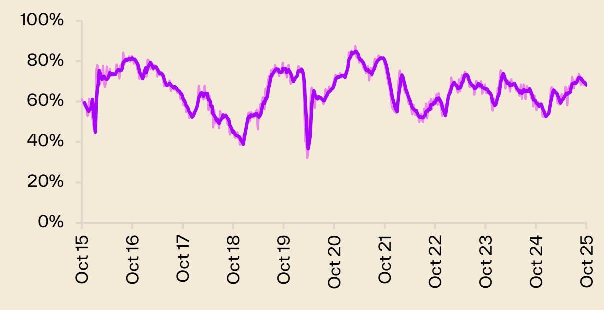
City	Clearance rate	Total auctions	Cotality auction results	Cleared auctions	Uncleared auctions
Sydney	68.2%	959	754	514	240
Melbourne	71.8%	1,835	1,427	1,025	402
Brisbane	73.5%	190	132	97	35
Adelaide	70.8%	159	89	63	26
Perth	66.7%	18	12	8	4
Tasmania	n.a.	4	2	2	0
Canberra	59.4%	88	69	41	28
Combined capitals	70.5%	3,253	2,485	1,751	734

Weekly clearance rates

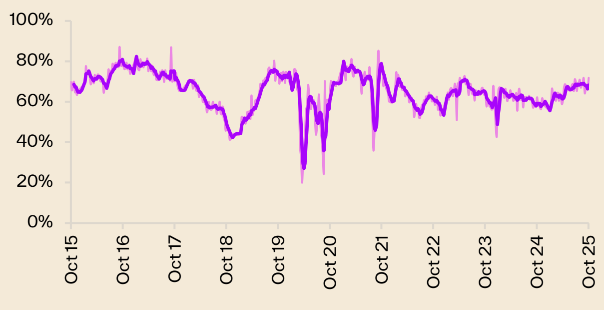
Combined capital cities



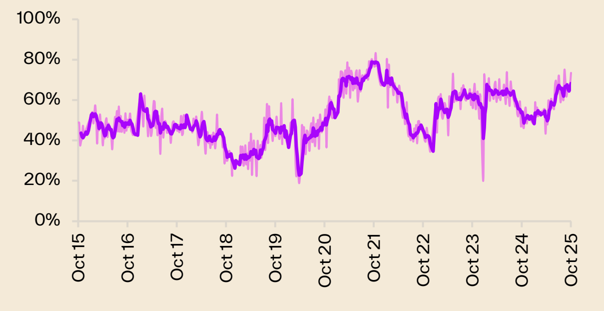
Sydney



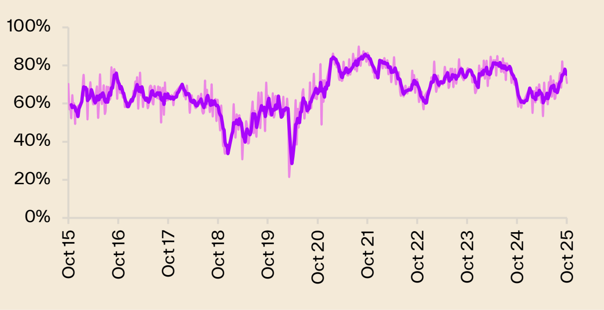
Melbourne



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	56.0%	34	25	14	11
Baulkham Hills and Hawkesbury	84.6%	30	13	11	2
Blacktown	76.3%	74	38	29	9
City and Inner South	53.3%	102	92	49	43
Eastern Suburbs	66.3%	89	86	57	29
Inner South West	73.0%	127	100	73	27
Inner West	70.5%	74	61	43	18
North Sydney and Hornsby	71.7%	114	92	66	26
Northern Beaches	66.7%	61	54	36	18
Outer South West	n.a.	7	6	4	2
Outer West and Blue Mountains	70.0%	14	10	7	3
Parramatta	64.4%	78	59	38	21
Ryde	67.4%	66	49	33	16
South West	74.3%	48	35	26	9
Sutherland	82.4%	41	34	28	6
Melbourne sub-regions					
Inner	74.2%	343	267	198	69
Inner East	66.7%	254	204	136	68
Inner South	70.2%	278	208	146	62
North East	74.6%	218	173	129	44
North West	72.1%	168	147	106	41
Outer East	78.5%	130	93	73	20
South East	76.2%	179	126	96	30
West	66.3%	238	187	124	63
Mornington Peninsula	78.3%	28	23	18	5
Regional SA4					
Newcastle and Lake Macquarie	78.3%	32	23	18	5
Illawarra	n.a.	11	9	4	5
Gold Coast	58.1%	47	31	18	13
Sunshine Coast	27.8%	32	18	5	13
Geelong	80.0%	29	20	16	4

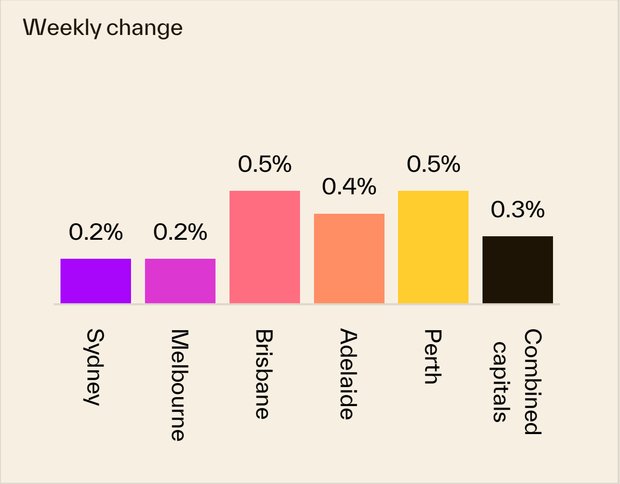
The above results are preliminary, with 'final' auction clearance rates published each Thursday. Cotality, on average, collects 99% of auction results each week. Clearance rates are calculated across properties that have been taken to auction over the past week.

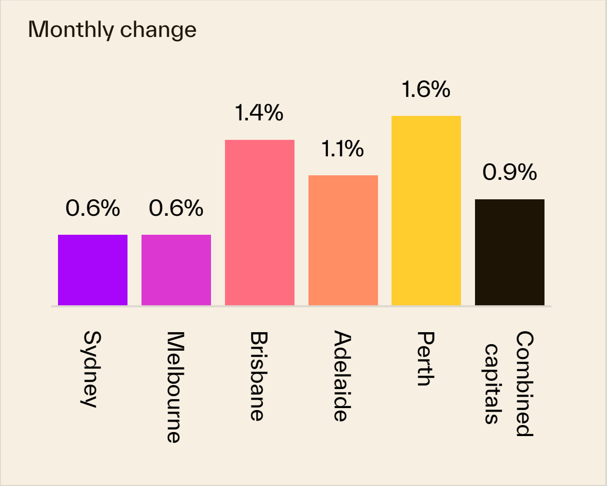
Media enquiries: media@cotality.com

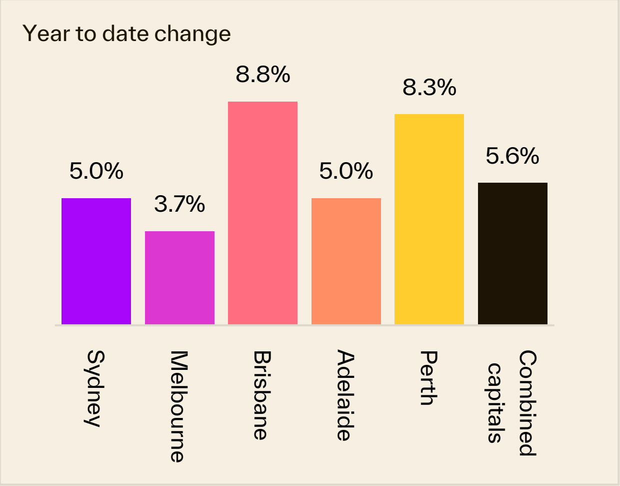
cotality

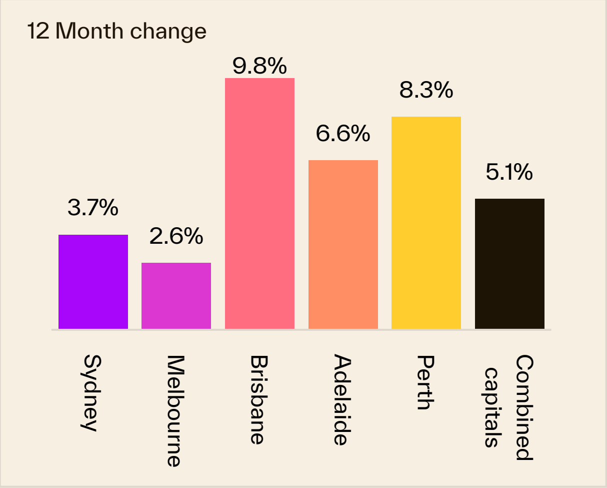
Property Market Indicator Summary

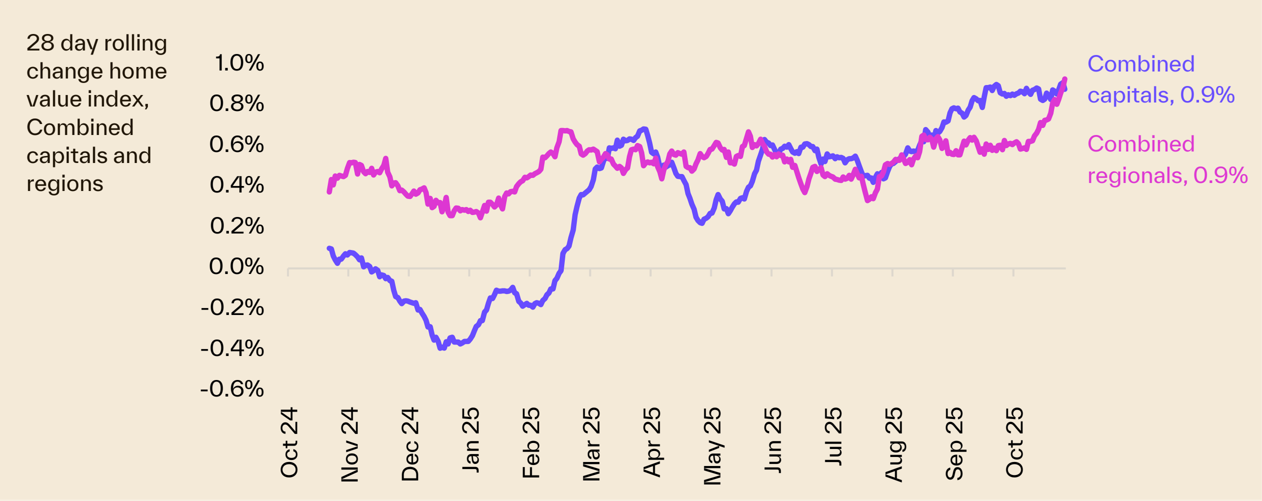
Capital city home value changes











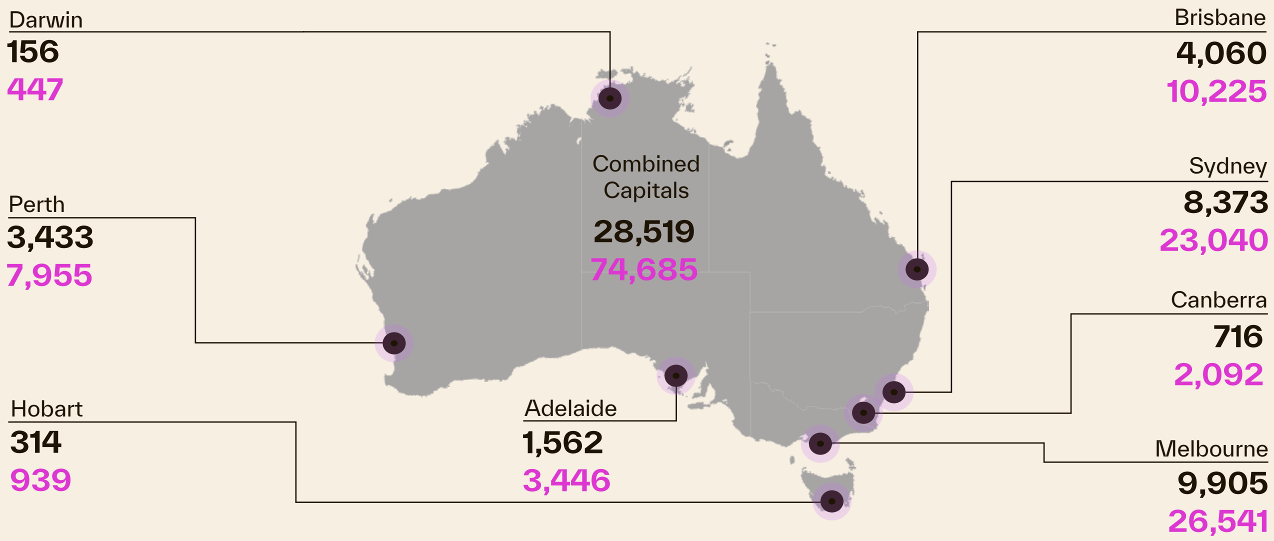
Results are based on the Cotality Daily Home Value Index. Further information and daily updates on the index results are available from https://www.cotality.com/au/our-data/indices.

Media enquiries: media@cotality.com

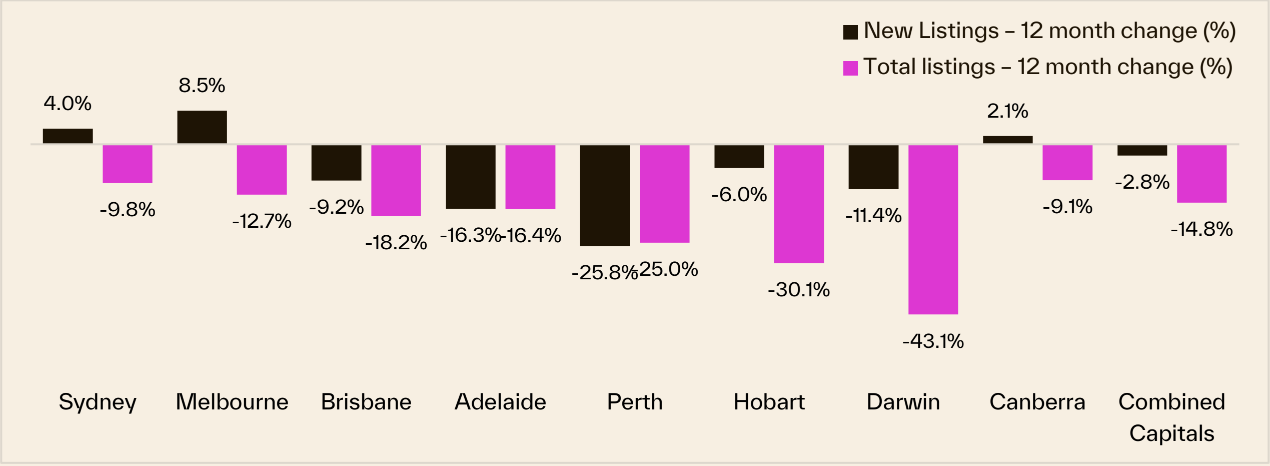
Property Market Indicator Summary

Capital city properties listed for sale — four week count

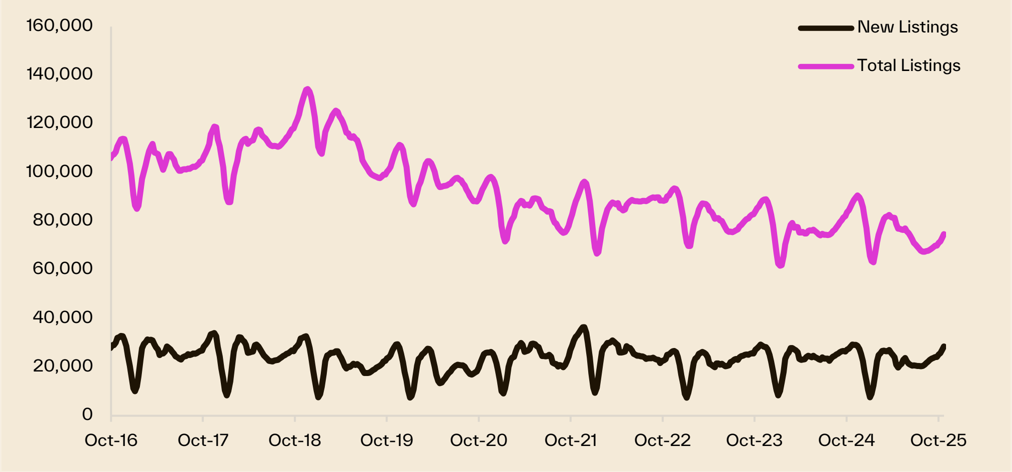
New listings
Total listings



Listings — 12 month change (%)



Number of homes for sale, combined capital cities

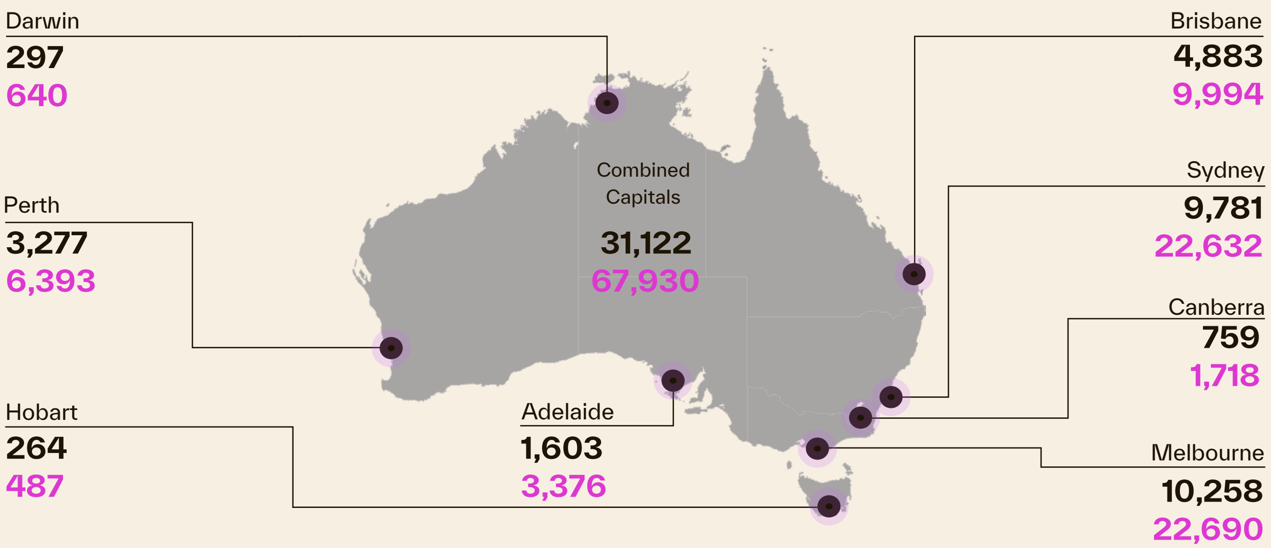


These results are calculated across properties that have been advertised for sale over the 28 days ending 26 October 2025. A new listing is one which has not been previously advertised for sale within 75 days, total listings include new

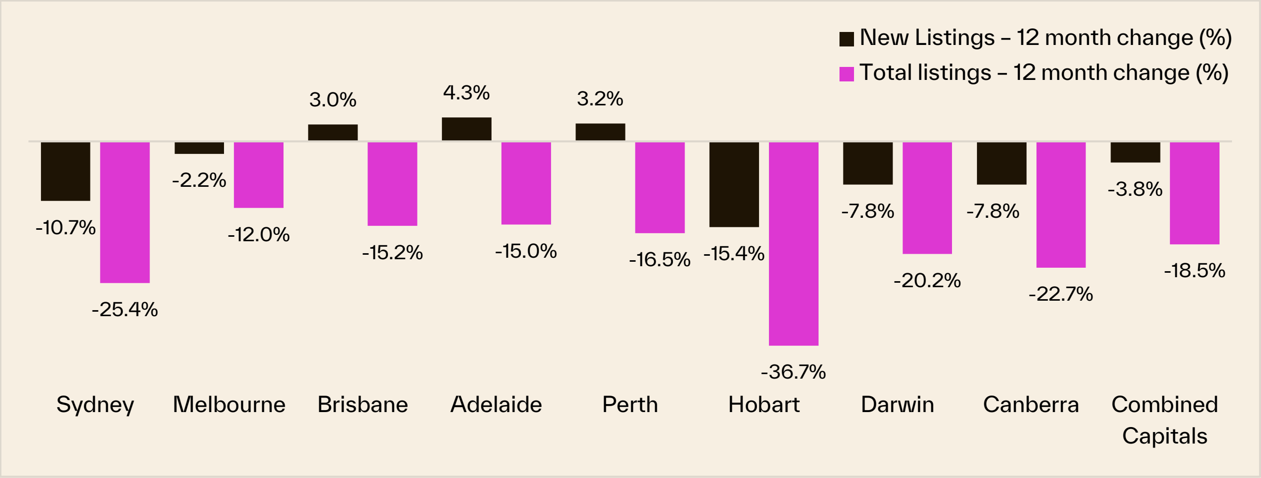
cotality

Property Market Indicator Summary

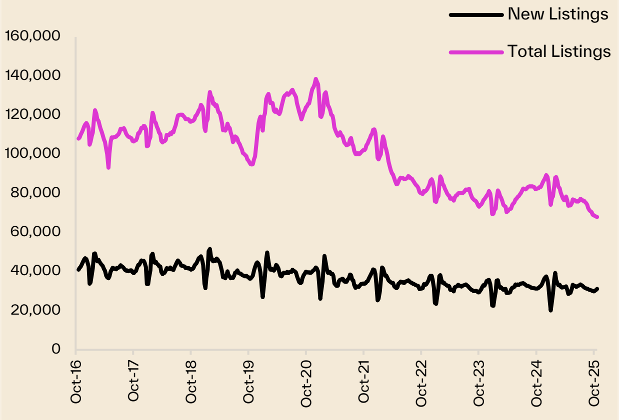
Capital city properties listed for rent — four week count



Rental listings — 12 month change (%)



Number of homes for rent, combined capital cities



Rental snapshot — data to September 2025

		Change in rents (all dwellings)			Gross yields (all dwellings)		Vacancy rates (all dwellings)	
Region	**Median rent**	**Month**	**Quarter**	**Annual**	**Current**	**12 months ago**	**Current**	**12 months ago**
Sydney	$807	0.3%	0.8%	3.5%	3.0%	3.0%	1.6%	2.3%
Melbourne	$615	0.1%	0.4%	1.4%	3.7%	3.6%	1.4%	1.7%
Brisbane	$696	0.3%	1.2%	5.6%	3.6%	3.7%	1.7%	2.1%
Adelaide	$633	-0.1%	0.0%	3.9%	3.6%	3.7%	0.9%	1.2%
Perth	$729	0.4%	0.9%	5.6%	4.2%	4.2%	1.1%	1.4%
Hobart	$584	0.4%	0.8%	6.2%	4.4%	4.3%	1.2%	2.4%
Darwin	$687	1.7%	4.2%	7.6%	6.5%	6.8%	2.1%	2.1%
Canberra	$680	0.0%	0.3%	2.8%	4.0%	4.0%	1.6%	2.4%
Combined capitals	$702	0.3%	0.8%	3.7%	3.4%	3.4%	1.5%	1.9%
Combined regionals	$591	0.4%	1.1%	5.9%	4.4%	4.4%	1.4%	2.0%
National	**$672**	**0.3%**	**0.8%**	**4.3%**	**3.7%**	**3.6%**	**1.5%**	**1.9%**

cotality

Property Market Indicator Summary

Top two sales over the past week, states and territories

New South Wales

13 John Dykes Avenue
Vaucluse

5 3 2

$13,000,000

Laing & Simmons Double Bay

2A Conway Avenue
Rose Bay

5 4 2

$12,000,000

Laing & Simmons Double Bay

Victoria

18 Reid Street
Balwyn

5 4 3

$5,860,000

Kay & Burton Boroondara

17 Alimar Road
Glen Waverley

5 5 2

$4,860,000

JRW Property International

Queensland

2633 Virginia Drive
Hope Island

5 3 4

$4,175,000

Ray White Hope Island

20 Dolphin Court
Palm Beach

4 4 3

$3,925,000

Coastal

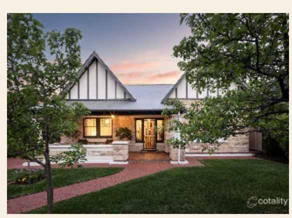
South Australia

65 Gould Road
Stirling

5 2 2

$4,000,000

Noakes Nickolas



26 Lynington Street
Tusmore

4 2 0

$2,900,000

Noakes Nickolas

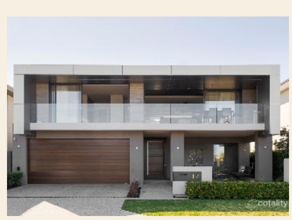
Western Australia

140 Forrest Street
Peppermint Grove

5 3 6

$13,100,000

Mack Hall Real Estate West Perth



17 Westmeath Street
North Fremantle

4 3 3

$5,900,000

Mack Hall Real Estate West Perth

Property Market Indicator Summary

Top two sales over the past week, states and territories

Tasmania

48 Bain Terrace
Trevallyn

4 4 3

$1,530,000

Bushby Creese

7 Weedings Way
Woodbridge

4 2 2

$1,200,000

View Hobart

Northern Territory

18 Chin Street
Millner

3 2 4

$871,500

Real Estate Central

17 Cypress Crescent
East Sid

3 1 3

$447,500

Alice Springs Realty

Australian Capital Territory

54 Wanderlight Avenue
Lawson

4 3 2

$1,800,000

Belle Property Canberra

10 Noala Street
Aranda

4 2 4

$1,580,000

The Property Collective

Media enquiries: media@cotality.com

cotality

Disclaimers

In compiling this publication, RP Data Pty Ltd trading as Cotality (ABN 67 087 759 171) ("**Cotality**") has relied upon information supplied by a number of external sources. Cotality does not warrant its accuracy or completeness and to the full extent allowed by law excludes liability in contract, tort or otherwise, for any loss or damage sustained by subscribers, or by any other person or body corporate arising from or in connection with the supply or use of the whole or any part of the information in this publication through any cause whatsoever and limits any liability it may have to the amount paid to Cotality for the supply of such information.

New South Wales Data

Contains property sales information provided under licence from the Valuer General New South Wales. RP Data Pty Ltd trading as Cotality is authorised as a Property Sales Information provider by the Valuer General New South Wales.

Victorian Data

The State of Victoria owns the copyright in the Property Sales Data and reproduction of that data in any way without the consent of the State of Victoria will constitute a breach of the Copyright Act 1968 (Cth). The State of Victoria does not warrant the accuracy or completeness of the Property Sales Data and any person using or relying upon such information does so on the basis that the State of Victoria accepts no responsibility or liability whatsoever for any errors, faults, defects or omissions in the information supplied.

Queensland Data

Based on or contains data provided by the State of Queensland (Department of Resources) 2025. In consideration of the State permitting use of this data you acknowledge and agree that the State gives no warranty in relation to the data (including accuracy, reliability, completeness, currency or suitability) and accepts no liability (including without limitation, liability in negligence) for any loss, damage or costs (including consequential damage) relating to any use of the data. Data must not be used for direct marketing or be used in breach of the privacy laws; more information at www.propertydatacodeofconduct.com.au.

Australian Capital Territory Data

The Territory Data is the property of the Australian Capital Territory. Any form of Territory Data that is reproduced, stored in a retrieval system or transmitted by any means (electronic, mechanical, microcopying, photocopying, recording or otherwise) must be in accordance with this agreement. Enquiries should be directed to: acepdcustomerservices@act.gov.au.
Director, Customer Coordination, Access Canberra ACT Government. GPO Box 158 Canberra ACT 2601.

South Australian Data

© 2025 Copyright in this information belongs to the South Australian Government and the South Australian Government does not accept any responsibility for the accuracy or completeness of the information or its suitability for any purpose.

Western Australian Data

Information contained within this product includes or is derived from the location information data licensed from Western Australian Land Information Authority (WALIA) (2025) trading as Landgate. Copyright in the location information data remains with WALIA. WALIA does not warrant the accuracy or completeness of the location information data or its suitability for any particular purpose. Western Australian Land Information Authority owns all copyright in the location information which is protected by the Copyright Act 1968 (Cth) and apart from any use as permitted under the fair dealing provisions of the Copyright Act 1968 (Cth), all other rights are reserved and no location information, or part of the location information, may be reproduced, distributed, commercialised or re-used for any other purpose without the prior written permission of Western Australian Land Information Authority (Landgate).

Tasmanian Data

This product incorporates data that is copyright owned by the Crown in Right of Tasmania. The data has been used in the product with the permission of the Crown in Right of Tasmania. The Crown in Right of Tasmania and its employees and agents:

a) give no warranty regarding the data's accuracy, completeness, currency or suitability for any particular purpose; and
b) do not accept liability howsoever arising, including but not limited to negligence for any loss resulting from the use of or reliance upon the data.

Base data from the LIST © State of Tasmania
http://www.thelist.tas.gov.au

Media enquiries: media@cotality.com

Get the latest property news and insights

cotality.com/au/newsroom