

REGIONAL QLD PROPERTY MARKET INSIGHTS Q3 2025

more
than
money



SNAPSHOT

Dwelling Value Change

+2.7% **+9.3%**
Quarter Annual

\$764,258
Median Dwelling Value

61,178
Annual Dwelling Sales

25 Days
Median Days on Market

Source: Cotality



- Momentum continued across regional Queensland in Q3, as property values pushed further into peak territory. House values rose 2.8% over the quarter and 9.7% year-on-year, lifting the median price to \$771,371. Over the past five years, house values have surged 76.9%, reflecting sustained demand and limited supply. Unit values followed a similar trajectory, increasing 2.6% quarterly and 7.9% annually, with a median of \$744,251 and a five-year growth of 76.8%. Leading the state in growth was Western Downs (Darling Downs – Maranoa), up 5.3% for the quarter and 13.4% year-on-year, followed by Maranoa, in the same SA4 region, with 5.1% quarterly growth and the third-highest annual increase at 12.2%, just behind Charters Towers in Townsville at 12.3%.
- Sales and listing activity across regional Queensland remained subdued in Q3, reflecting ongoing supply constraints and shifting buyer sentiment. House sales were down -11.2% year-on-year, sitting 10.9% below the five-year average, while unit sales declined -16.2% annually, falling 20.3% below trend. Listing volumes also contracted, with house listings down -12.2% and unit listings dropping -18.0% compared to the same period last year.
- While national migration flows have softened, regional Queensland has strengthened its position as a top destination for movers. In the June 2025 quarter, the state captured 31% of all net migration from capital cities, up from 19% a year earlier, marking the largest gain among all regions. Although overall internal migration declined – capital-to-regional moves fell 19.3% quarterly and 16.5% annually – the net flow still favoured the regions, with 11.2% of all relocations moving from capitals to regional areas, compared to 8.9% in the opposite direction. Popular destinations included the Sunshine Coast, Fraser Coast and Townsville.
- Rental performance in regional Queensland held firm in Q3, with growth in rents and yields reflecting sustained pressure on supply. House rents rose 8.3% year-on-year, while unit rents increased 6.5%, driven by strong tenant demand and limited availability. The region's gross rental yield sits at 4.3%, outperforming the national average of 3.7%, though slightly below the combined regional average of 4.4%.

Valuer on the Ground

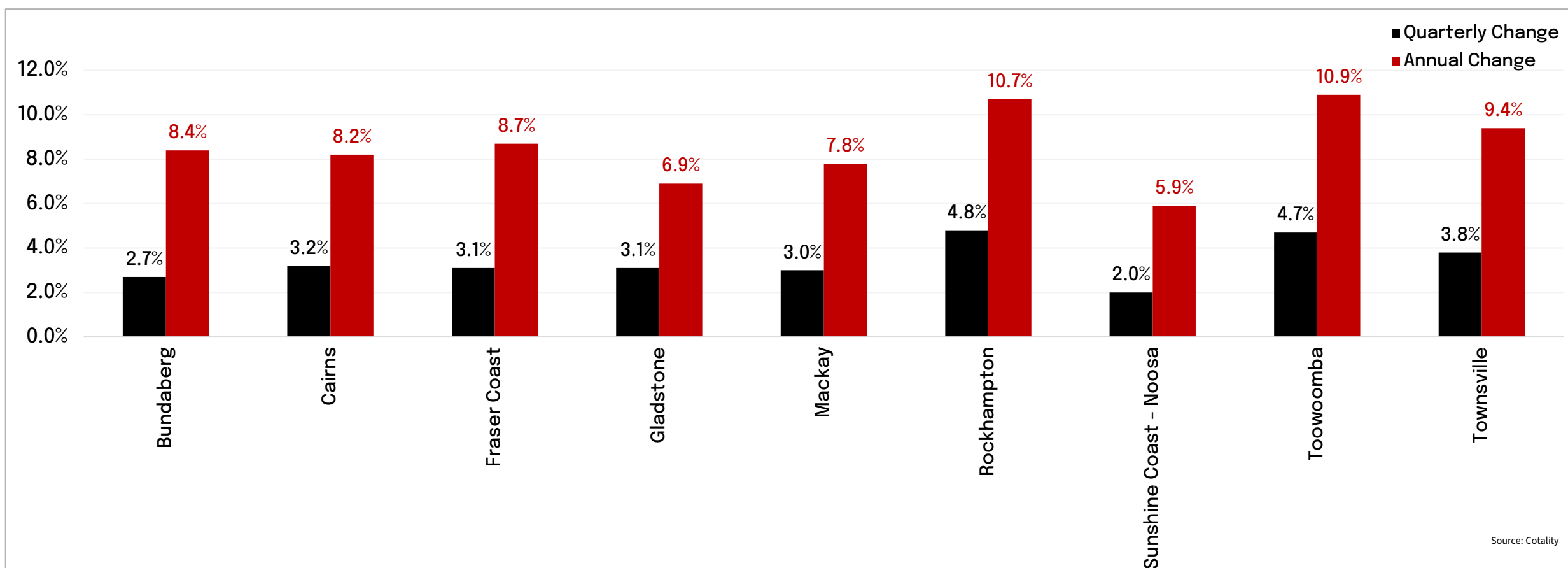
Strong growth across regional Queensland has been fuelled by affordability, migration and infrastructure investment.

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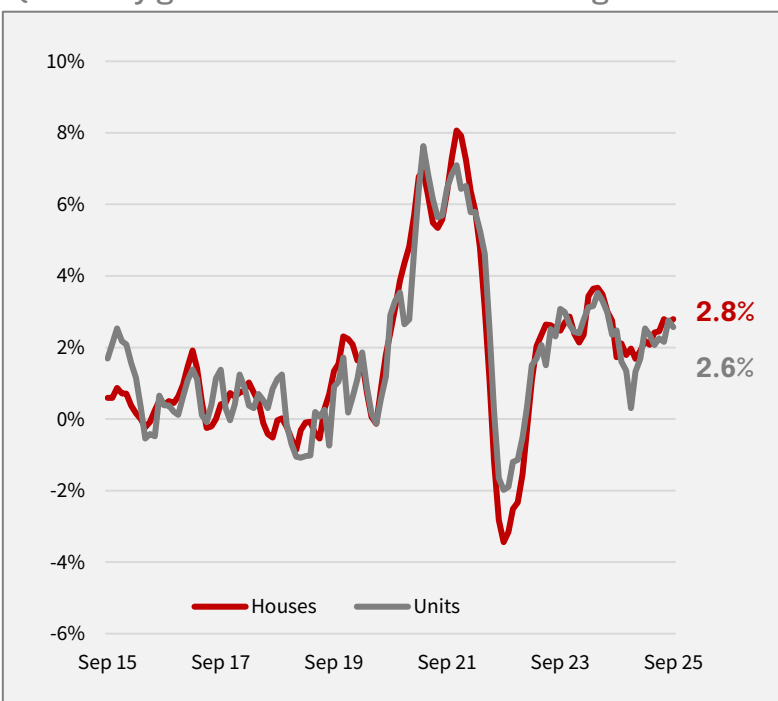


Regional Cities – Quarterly and Annual Growth



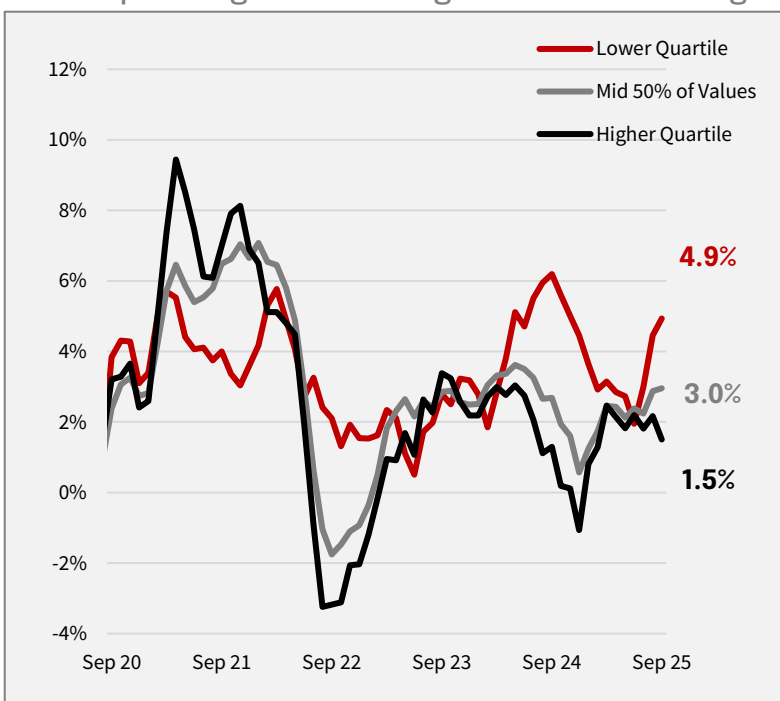
Quarterly Value Change by Property Type

Quarterly growth similar across both segments



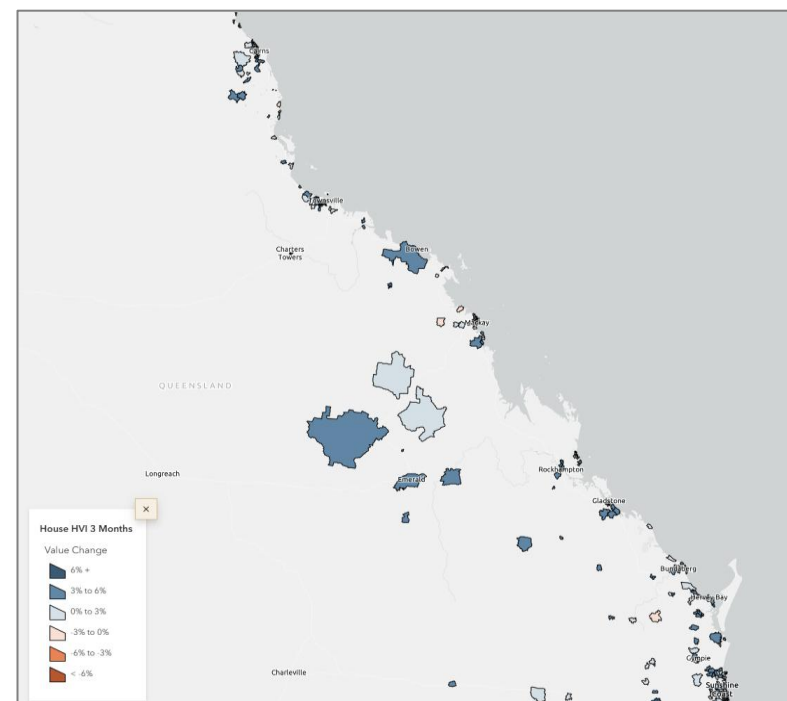
Quarterly Value Change by Price Quartile

Lower quartile growth slowing after recent strength



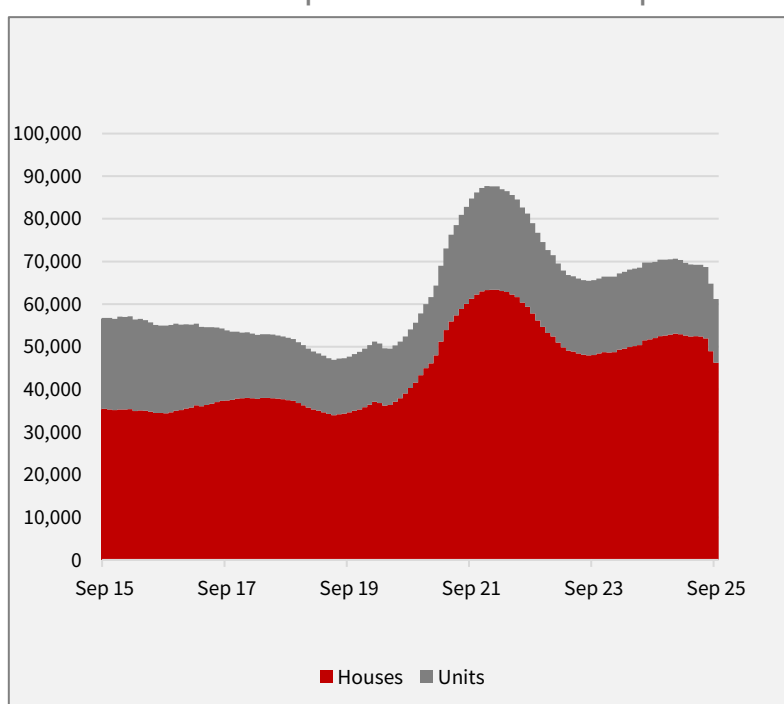
Mapping the Market – 3 months to Sep

Positive quarterly growth across most of the state



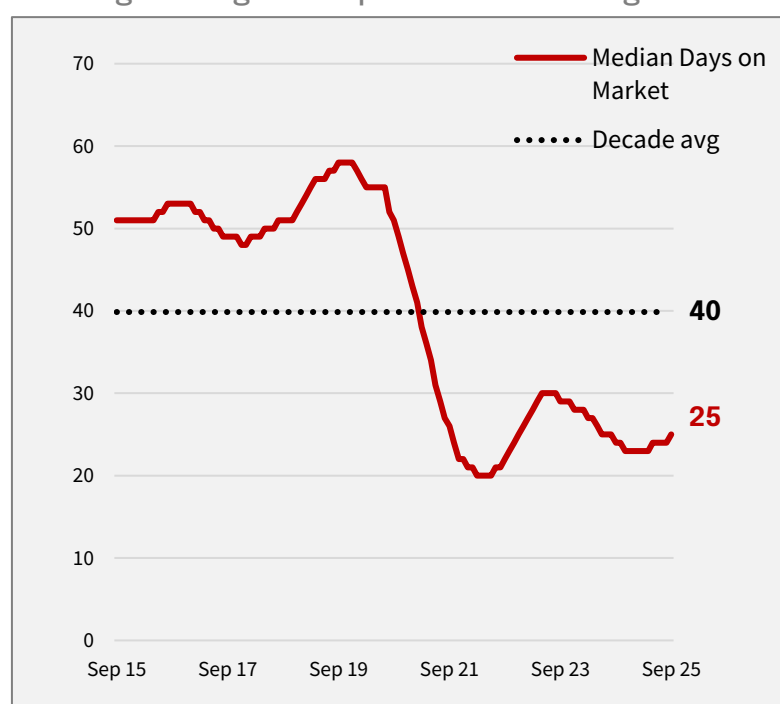
Annual Volume of Sales by Property Type

House sales made up 76% and units made up 24%



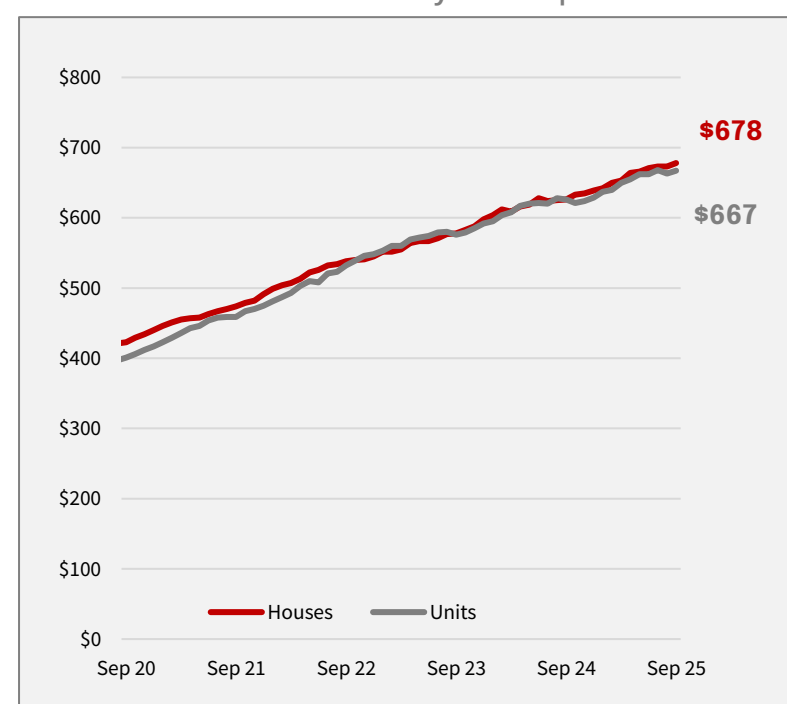
Median Days on Market vs Decade Average

Dwellings selling much quicker than average



Median Rental Value by Property Type

Houses and units record very similar performance



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RECENT SALES ACTIVITY

204 Albert Street, Maryborough



\$600,000



3



1



1



1,012 m²



102 m²

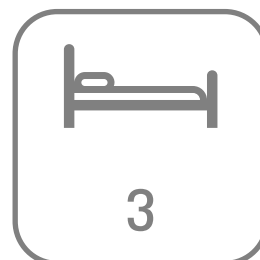
Sold: 05/09/2025

Days on Market: 72

15 Delacey Street, North Toowoomba



\$850,000



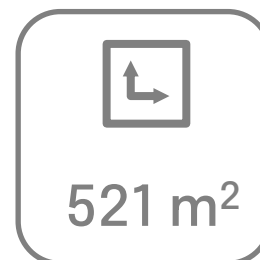
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2



1



521 m²



76 m²

Sold: 06/09/2025

Days on Market: 17

36 Seaview Terrace, Sunshine Beach



\$8,250,000



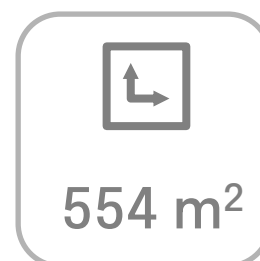
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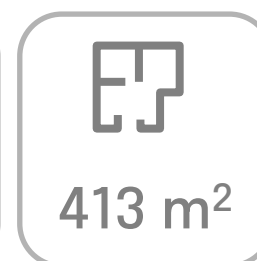
4



2



554 m²



413 m²

Sold: 30/09/2025

Days on Market: 28

Source: Cotality

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