

# REGIONAL NSW PROPERTY MARKET INSIGHTS Q3 2025

## SNAPSHOT

### Dwelling Value Change

+1.0% **+4.4%**  
Quarter Annual

**\$781,440**  
Median Dwelling Value

**58,833**  
Annual Dwelling Sales

**51 Days**  
Median Days on Market

Source: Cotality



- Regional NSW's appeal as a lifestyle destination is translating into strong property market performance, with Q3 marking a new high for both houses and units. House values rose by 1.0% over the quarter and 4.6% annually, lifting the median to \$808,657, while unit values increased 0.8% quarterly and 3.4% year-on-year, reaching a median of \$644,505. Both asset types are now sitting at peak price levels. The strongest quarterly growth was observed in Narramine (4.2%) and Dubbo (4.0%), located in the Far West and Orana SA4 region, reflecting growing demand in inland centres. These results highlight the continued strength of regional markets, supported by affordability, lifestyle migration and infrastructure investment.
- Sales activity across regional NSW showed mixed results in Q3 2025, with house sales rising 2.0% annually, yet remaining -5.6% below the previous five-year average, indicating a moderate recovery. In contrast, unit sales declined -3.0% year-on-year and sat -7.9% below the five-year average, reflecting softer demand in the attached dwelling segment. Listing volumes were notably lower across the board, with house listings down -16.6% and unit listings down -14.8% compared to the same period last year. These tighter listing conditions suggest constrained supply, which may be contributing to upward pressure on prices.
- Despite a national slowdown in mobility, Regional NSW remains the leading destination for internal migration from capital cities, attracting 34% of all capital-to-regional relocations in the June 2025 quarter (the most recent data available) – more than any other state. While overall migration volumes fell to their lowest levels since 2019, the net flow still favours the regions, with 11.2% of all relocations moving from capitals to regional areas, compared to 8.9% in the opposite direction. This trend continues to support population growth and housing demand in regional NSW, particularly in LGAs like Lake Macquarie and Maitland, which ranked among the top five nationally for net internal migration inflows. Notably, Albury experienced a dramatic surge in net migration from capitals – up 205% year-on-year – highlighting the growing appeal of inland centres beyond traditional commuter belts.
- Rental conditions in regional NSW remain tight, with house rents rising 6.3% annually and unit rents increasing 6.8% over the same period. This sustained growth reflects ongoing supply constraints and strong tenant demand, particularly in lifestyle-driven markets. The gross rental yield sits at 4.1%, offering solid returns for investors amid rising property values.

### Valuer on the Ground



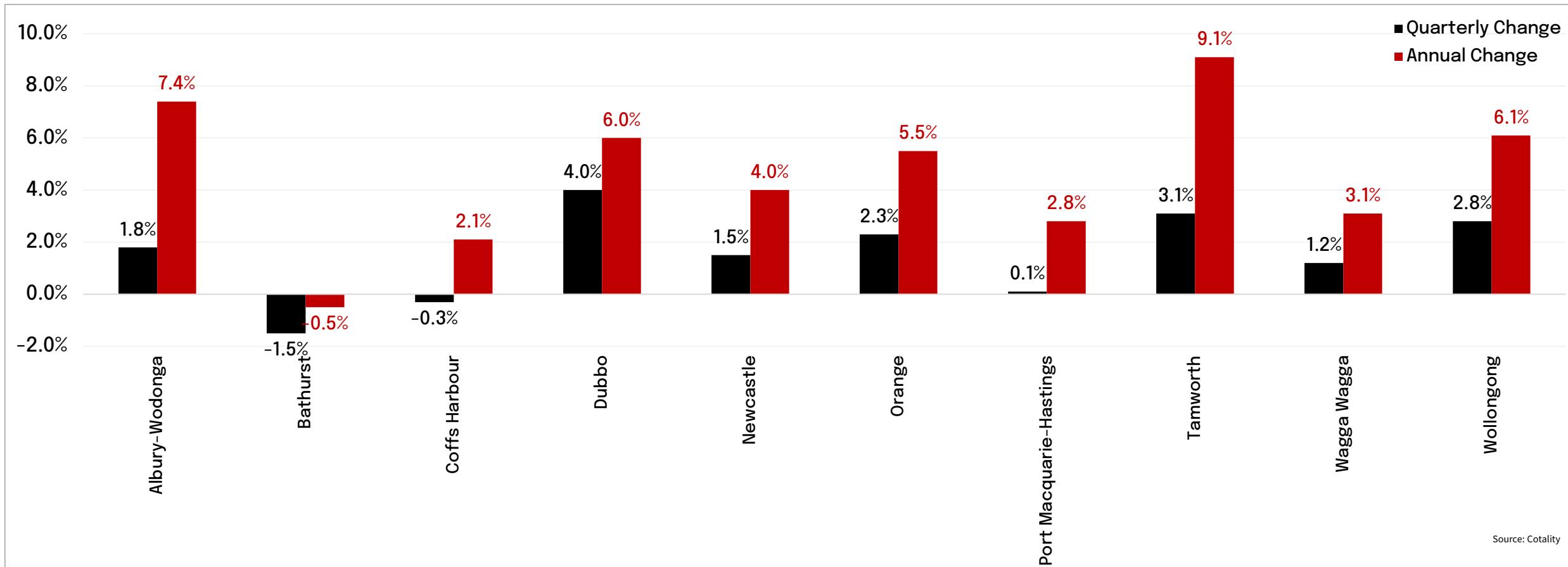
Tight rental conditions are driving strong investor returns.



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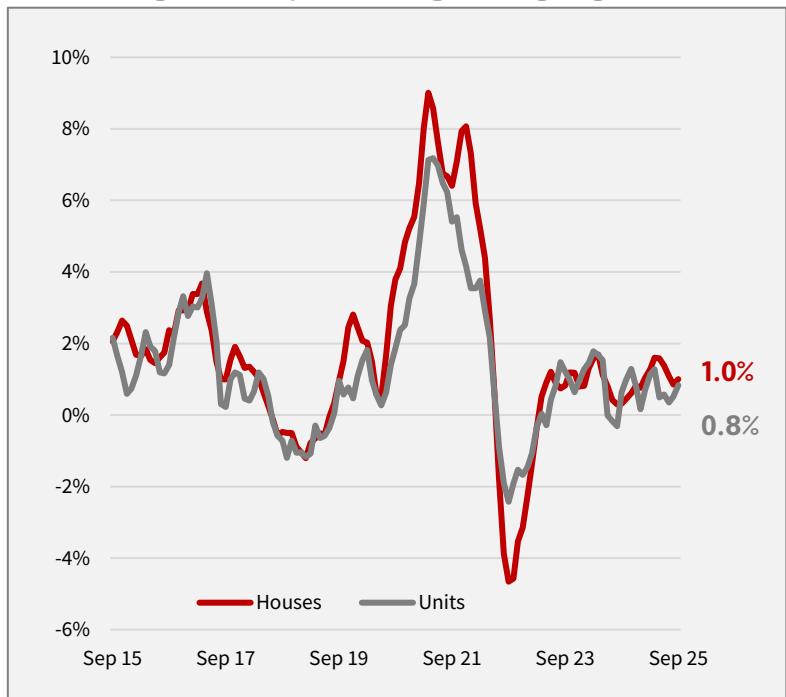
## Q3 2025

### Regional Cities - Quarterly and Annual Growth



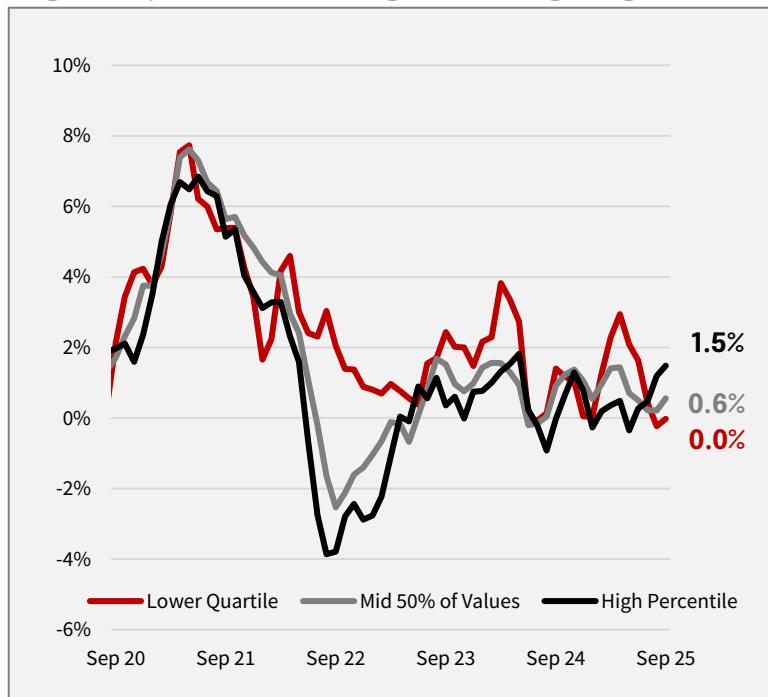
### Quarterly Value Change by Property Type

House segment experiencing stronger growth



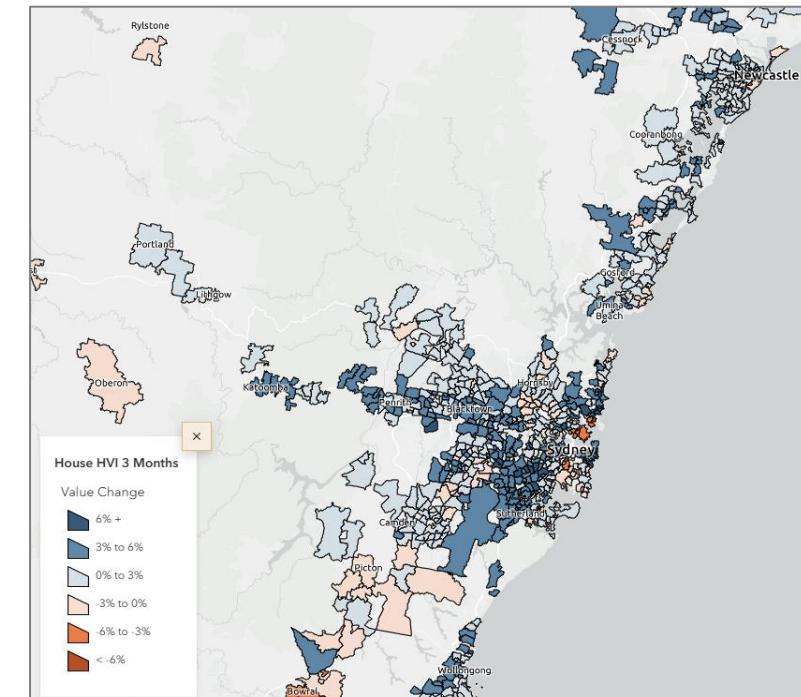
### Quarterly Value Change by Price Quartile

Highest quartile recording the strongest growth



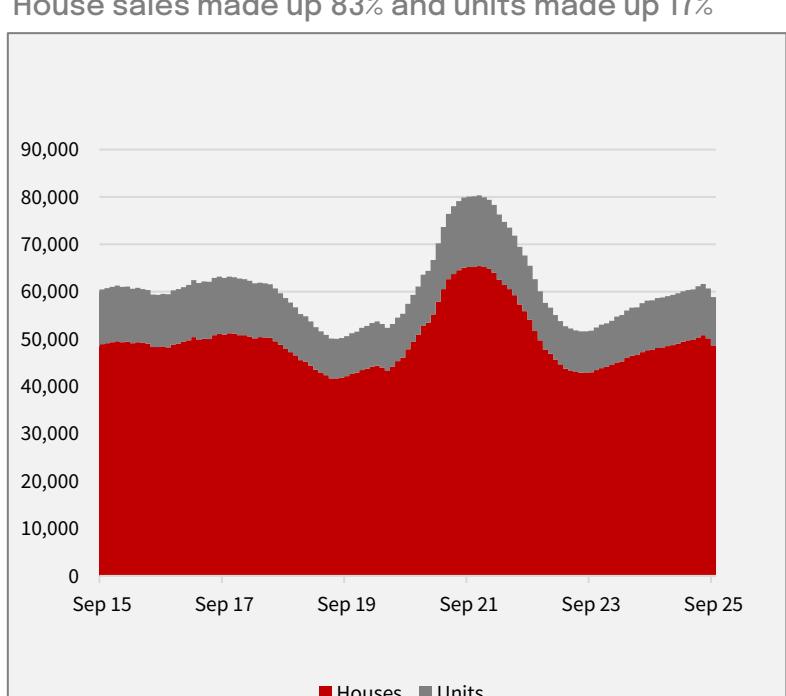
### Mapping the Market - 3 months to Sep

Coastal regions noting strong growth



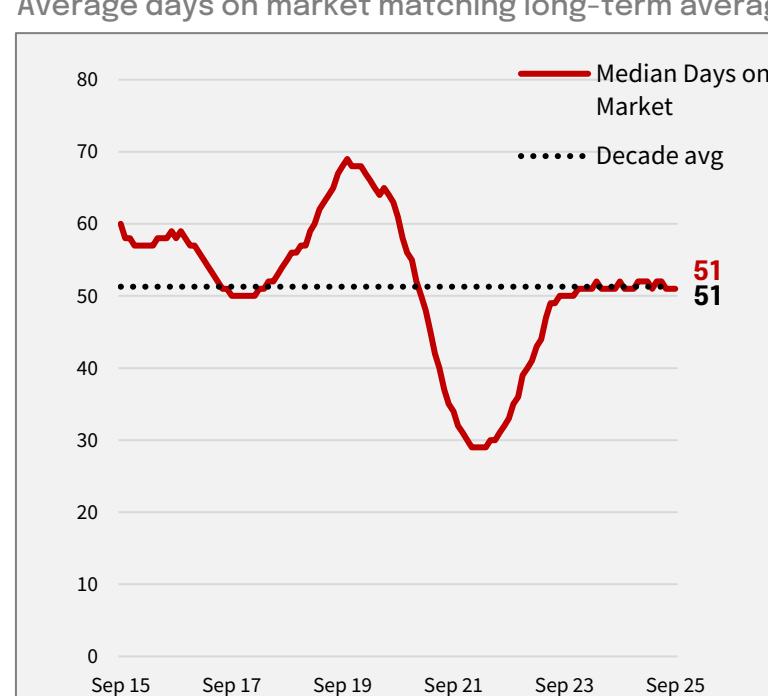
### Annual Volume of Sales by Property Type

House sales made up 83% and units made up 17%



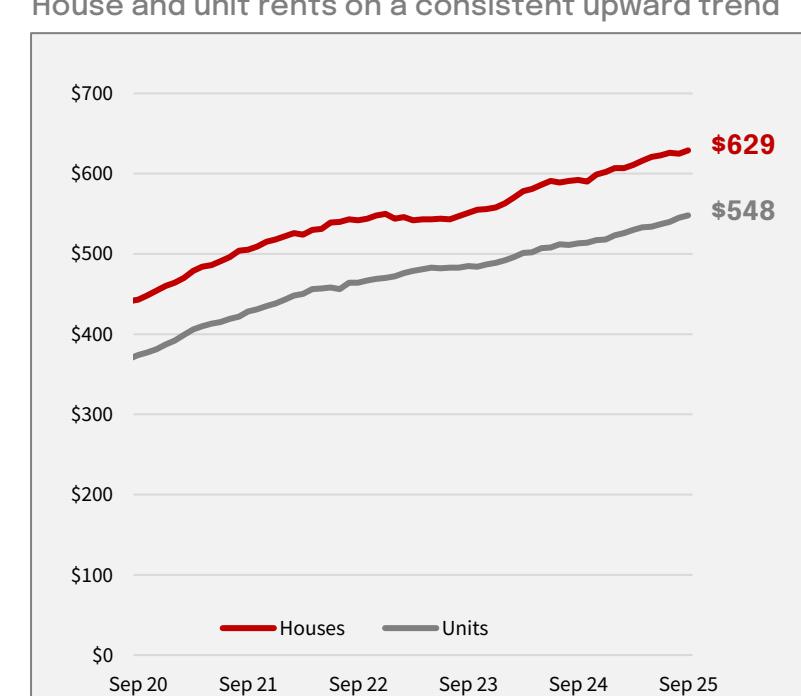
### Median Days on Market vs Decade Average

Average days on market matching long-term average



### Median Rental Value by Property Type

House and unit rents on a consistent upward trend



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## RECENT SALES ACTIVITY

### 83 Denne Street, West Tamworth



\$700,000



Sold: 04/09/2025

Days on Market: 25

### 30 Allunga Avenue, Port Macquarie



\$1,055,000



Sold: 26/09/2025

Days on Market: 17

### 248 Scenic Drive, Merewether Heights



\$3,100,000



Sold: 12/09/2025

Days on Market: 85

Source: Cotality