# U Hooker Open Market your national property report

# Why investors still love real estate

Great value for buyers in Tasmania

Affordability drives Brisbane growth





# Welcome to the latest LJ Hooker Open Market report

Property markets across the country continue to move in different directions thanks to the current two speed economy. As markets evolve it's important that you stay up to date with the latest trends to ensure that you are able make sound real estate decisions. This report provides you with the latest data and commentary to do just that. However, home prices and activity in your neighbourhood are dependent on local market conditions. To best understand how your suburb is performing, we invite you to continue the conversation with us, your local LJ Hooker real estate specialist.

ljhooker.com.au

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# An insight into the mind of a property investor

Investors have long played a vital role in the development and evolution of the Australian property market. Some public debates created a negative perception around the recent increase in investor activity, claiming it priced out first home buyers in a competitive market, while negative gearing was an impost on the tax base.

But investors actually play a vital role during softer market conditions. Investors assist in growing the supply of new dwellings and provide rental accommodation for those who cannot afford to purchase, or are saving to buy a property. The strength of recent investor demand for off-the-plan dwellings has also provided a boost to the national economy with the current construction boom creating new jobs and supporting local communities.

### So what attracts investors to property in Australia?

Over the past two years there have been a number of key drivers attracting higher than normal levels of investors in the residential property market in Australia. These include:

- Record low interest rates.
- Volatility in other investment assets classes e.g. equity markets.
- Low returns on other assets classes e.g. government bonds and term deposits.
- The perceived security of bricks and mortar.

### The 2015 LJ Hooker Investor/Tenant survey

LJ Hooker recently undertook a major survey of landlords around the country to gain further insight in the drivers of residential property investors around the country.

### Boosting wealth and setting up retirement

The results also showed how an investor's property portfolio transforms in line with their journey through life. Investors aged between 18 and 24 own two properties on average while those close to retirement (55 to 64) own more than three properties. Then at the age of 65 investors sell down a proportion of their portfolio, to help fund their retirement, with the 65+ age group owning an average of just under two properties.

### Income doesn't limit investment

Property investment is not just limited to the wealthy. The survey showed that 37% of landlords have an annual household income of under \$100,000 per year. A further 29% earn between \$100,000 and \$150,000 and 34% have an income of more than \$150,000 per year.

### A balanced investment strategy dominates

One of the key drivers pushing investors to invest during the current cycle has been the strong capital growth seen particularly in Sydney and Melbourne. Our survey results show that while a majority of investors take a "balanced" investment strategy (58%), a large proportion do view "capital growth" as a vital part of their investment strategy (27%), compared to those just focusing on "yield" (15%).

### Investors search far and wide for the right property

The mobility of the investors is also highlighted in our survey with just 16% owning an investment property within 5 kilometres of where they live. The majority of investors (28%) have an investment property "more than 20 kilometres but in the same state" of where they live while 14% invest in a different state to the one where they live.

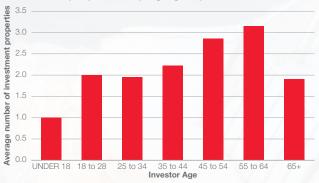
### Negative gearing plays an important role

As expected negative gearing plays an important role in a typical property investment strategy with 55% stating that it was "important" or "very important" to them. In addition to this, 31% said that they would sell some, or all, of their investment properties if negative gearing was abolished.

### Conclusion

The broad and diverse demographic mix, of property investors provides a key insight into why so much public and media attention is afforded to the residential property market. In addition our survey shows that property investment transcends age and plays a vital role in creating wealth through all stages of life.

### Investment properties by age group



Source: LJ Hooker Investor Survey 2015

# A tale of two markets

Australian housing markets have always shown a diverse performance, and the most recent trend is no exception. While the Sydney and Melbourne housing markets have recorded a solid capital gain performance over the current cycle, the Perth and Darwin markets have entered a down phase. The remaining capital cities are generally showing a mixed result of slight upwards or downwards movement across the different product types.

Detached housing has generally outperformed apartments for capital gain, but conversely, apartments are typically showing a healthier yield profile compared with houses.

More recently though we have started to see some signs that the housing market in Sydney, and to a lesser extent, Melbourne, may be starting to move back towards a more sustainable pace of growth. Dwelling values in Sydney have risen by close to 80% since the beginning of 2009 and Melbourne values are almost 70% higher. As such, a slowdown in the pace of capital gains shouldn't be a surprise. Auction clearance rates have fallen below 70%, on high volumes across both cities. Sydney recently breached the 60% clearance rate mark, as buyers start to regain some balance in the market.

Rental rates are also recording relatively mild growth. Each of the capital cities achieved only small rental increases or falling rents over the past year. The highest rental growth has been in Sydney where dwelling rents are up by 2.1%, while the most substantial falls were are in Darwin, where the typical rent has fallen by 12.7% over the year. The effect of soft to negative rental growth has seen lower rental yields across each of the capital cities.

Housing market conditions are also being affected by changes in the lending environment. In response to higher capital requirements implemented by the prudential regulator, APRA, banks have lifted mortgage rates by between 15 to 20 basis points across both owneroccupier and investment. Mortgage rates for investment purposes have seen an additional premium of approximately 30 basis points on average.

The higher borrowing costs will be a disincentive to many prospective buyers, particularly investors. However, despite this hike, mortgage rates remain close to historic lows which should continue to support housing demand.

Additionally, new housing supply has substantially increased over the past three years, with the number of dwelling approvals recently moving through a record high. The increased level of approved housing supply is evident across both detached housing and apartments. The substantial increase in dwelling approvals will carry through to high levels of housing construction activity during 2016, which in turn will provide a substantial boost to local economic conditions.

Tighter lending conditions, more expensive mortgage rates for investors and lower yields, together with natural affordability constraints and higher levels of new housing supply is having a culminating effect and moderating the pace of capital gains.

	Dai	rwin
		Units
Median Price	\$590,000	\$480,000
Growth	-3.1%	-7.4%
Days on Market	<b>81</b> this year <b>55</b> last year	83 this year 51 last year
Discounting	<b>-8.3%</b> this year <b>-4.7%</b> last year	-7.9% this year -5.4% last year

Perth **Median Price** \$520,000 \$419,100 -4.0% Growth -0.7% 72 this year 62 this year Days on Market 46 last year 45 last year -7.3% this year -7.1% this year Discounting -5.0% last year -5.3% last year

### Adelaide

Median Price	\$430,000	\$340,000
Growth	0.3%	-6.9%
Days on Market	<b>48</b> this year <b>56</b> last year	55 this year 54 last year
Discounting	-5.6% this year -5.7% last year	-6.6% this year -6.1% last year

Note: 'this year' = September 2015, 'last year' = September 2014 \* Based on postcode median house sale prices for 12 months to end September 2015.

					Houses	
				Median Price	\$490,000	\$396,800
	• • • • • • •			Growth	4.9%	2.1%
				Days on Market	<b>48</b> this year <b>47</b> last year	<b>54</b> this year <b>47</b> last year
				Discounting	-5.4% this year -6.1% last year	-5.1% this year -5.6% last year
					Syc	lney
		А	.CT			
				Median Price	\$892,200	\$660,000
	Median Price	\$599,500	\$405,000	Growth	17.6%	12.6%
	Growth	1.1%	-6.2%	Days on Market	<b>28</b> this year <b>33</b> last year	<b>25</b> this year <b>26</b> last year
	Days on Market	40 this year 59 last year	57 this year 72 last year	Discounting	-4.9% this year -5.7% last year	-3.5% this year -4.0% last year
•	Discounting	-4.1% this year -4.6% last year	-4.6% this year			
		- <b>4.0 /0</b> last year	-4.8% last year			
		• • • •			Melb	ourne
		Ho	bart		House	Laits
	Median Price		bart			

Median Price	\$330,000	\$290,000
Growth	-0.6%	3.7%
Days on Market	<b>76</b> this year <b>66</b> last year	<b>41</b> this year <b>63</b> last year
Discounting	-6.3% this year -6.7% last year	-5.5% this year -5.2% last year

	Melb	ourne
		Units
Median Price	\$605,000	\$485,600
Growth	15.5%	3.7%
Days on Market	<b>30</b> this year <b>39</b> last year	<b>36</b> this year <b>45</b> last year
Discounting	-4.9% this year -5.5% last year	-4.9% this year -6.2% last year

Brisbane

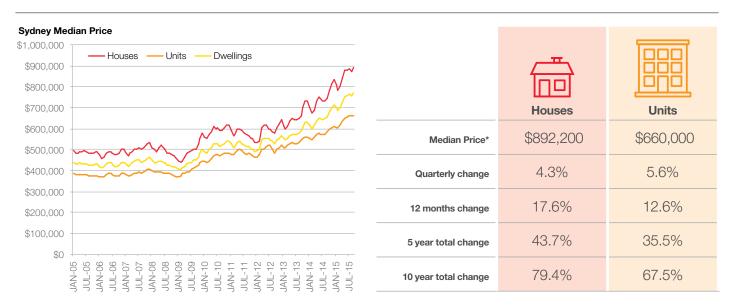
# **NEW SOUTH WALES**

# Sydney's growth shows signs of peaking

Sydney's rate of capital gain has been nation leading over the current cycle. This has seen dwelling values rise a cumulative 50% since June 2012. There have been some recent signs that the rate of capital gain may be moving through the peak of the cycle as affordability constraints block some buyers from participating in the market. In addition, rental yields have moved to new historic lows

and lending conditions have continued to tighten. Houses have continued to show a stronger capital gain profile compared with apartments; however, both sectors of the market have shown a substantial increase in values over the cycle to date.

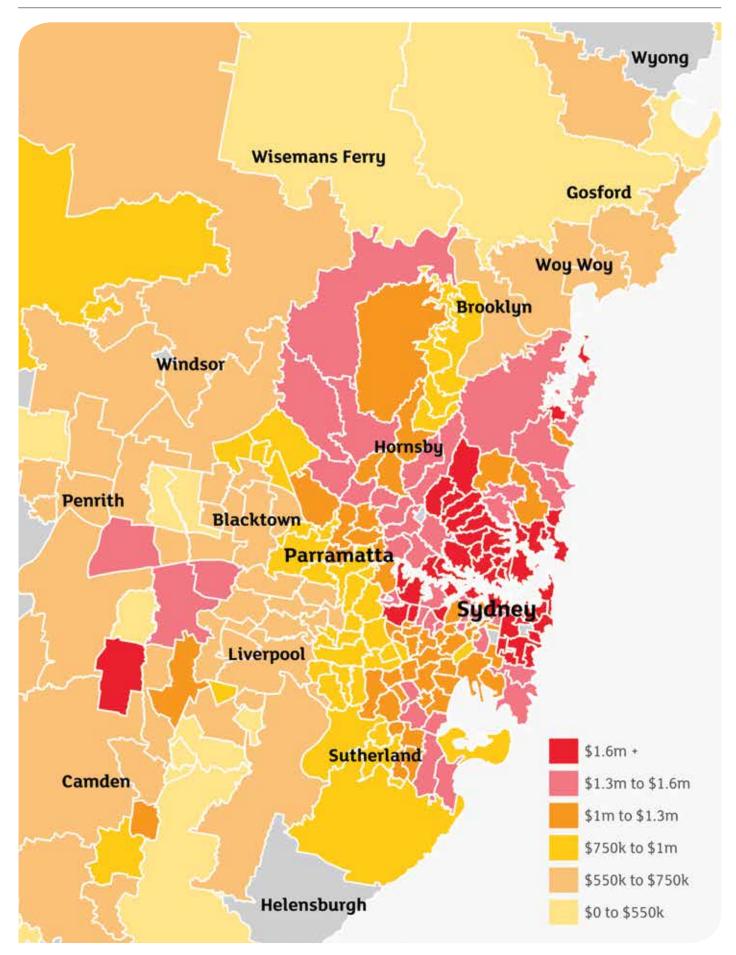
### Sydney's performance over time



### Sydney's best performers

$\square$	Rank	Suburb	\$	SOLD	<b>A</b>		Rank	Suburb	\$	SOLD	So do
	1	WARRAGAMBA	\$375,500	33	23.1%		1	AMBARVALE	\$311,500	34	19.8%
\$ Affordable	2	TREGEAR	\$402,000	75	21.8%	\$ Affordable	2	GOROKAN	\$275,000	42	16.5%
	3	BLACKETT	\$405,000	56	20.9%		3	KATOOMBA	\$307,500	32	14.7%
	1	MOUNT PRITCHARD	\$610,000	127	26.6%		1	ETTALONG BEACH	\$488,500	114	21.2%
\$\$ Mid range	2	LURNEA	\$595,250	137	25.3%	\$\$ Mid range	2	AUBURN	\$481,000	360	20.6%
	3	VALLEY HEIGHTS	\$601,100	23	24.2%	Ū.	3	HINCHINBROOK	\$475,000	14	19.5%
	1	CABARITA	\$2,440,000	28	47.9%		1	MILSONS POINT	\$1,425,000	74	45.1%
<b>\$\$\$</b> Prestige	2	CASTLECRAG	\$2,500,000	82	30.7%	<b>\$\$\$</b> Prestige	2	ROZELLE	\$1,090,000	77	40.6%
	3	WARRAWEE	\$2,480,500	46	29.2%		3	KIRRIBILLI	\$1,000,000	78	31.6%

### Median prices across Sydney



\* Based on postcode median house sale prices for 12 months to end September 2015.

# **NEW SOUTH WALES**

# How Sydney and NSW regions compare

	\$0.5m	\$1.5m	\$2.0m	\$2.5m	\$3.0m	Number sold	Days on Market	12 month growth
Eastern Suburbs					-	2,323	35	11.1%
Lower Northern Sydney			•	<u> </u>		3,128	30	20.0%
Inner Western Sydney	I.	i 🛛				1,453	35	21.8%
Northern Beaches		• <b>-</b>	•			3,034	25	15.7%
Inner Sydney						2,647	28	20.0%
Central Northern Sydney						6,382	22	26.9%
St George-Sutherland		• • •	•			4,424	28	20.7%
Canterbury-Bankstown			1	1	1	3,570	30	18.8%
Central Western Sydney						3,657	24	22.3%
Fairfield-Liverpool			 	1		3,934	26	20.4%
Blacktown						4,726	13	20.0%
Outer South Western Sydney						5,546	14	20.6%
Outer Western Sydney						6,248	18	18.2%
Queanbeyan		-	·····	······		655	82	-1.3%
Tweed Heads & Tweed Coast			I			1,075	70	6.0%
Wollongong						4,266	28	13.2%
Central Coast						7,546	20	14.4%
Port Macquarie						916	39	5.7%
Coffs Harbour						795	66	3.2%
Newcastle						10,172	49	4.7%
Illawarra SD Bal						3,630	68	10.7%
Richmond-Tweed SD Bal			1	1		2,354	84	5.5%
Nowra-Bomaderry						835	49	9.7%
Lower South Coast			I	1		1,710	106	2.0%
Bathurst						678	70	2.9%
Hunter SD Bal						1,720	111	3.9%
Lismore		I	I	I	1	518	81	5.0%
Orange						735	95	-1.9%
Clarence (excl. Coffs Harbour)			I	I		2,062	98	2.9%
Dubbo						802	44	6.6%
Hastings (excl. Port Macquarie)	<b></b>					2,394	90	7.6%
Wagga Wagga						1,081	76	0.7%
Tamworth						847	79	5.9%
Southern Tablelands (excl. Queanbeyan)			1	1	1	1,595	80	4.8%
Albury						974	75	6.9%
Central Tablelands (excl. Bathurst & Orange)						1,071	95	1.9%
Northern Tablelands						1,139	101	10.4%
Snowy						351	123	7.3%
Northern Slopes (excl. Tamworth)						707	97	7.2%
Lower Murrumbidgee						639	91	8.9%
North Central Plain						349	115	8.0%
Central Macquarie (excl. Dubbo)						874	98	-7.1%
Upper Murray (excl. Albury)		 		1		398	125	2.8%
Central Murray						558	103	-0.4%
Central Murrumbidgee (excl. Wagga Wagga)		1				921	112	0.5%
Lachlan						995	99	8.1%
Murray-Darling						142	76	-8.1%
Macquarie-Barwon			I			198	97	14.5%
Upper Darling						75	138	-19.7%
Far West						349	128	-2.7%

Lower range (25th percentile) — Median price (50th percentile) — Upper range (75th percentile)

# Diverse performance for coast, resources and service centres

The areas outside of the Sydney metro area have shown a diverse performance, with coastal markets continuing to show improvements in buyer demand, which is pushing prices higher and encouraging vendor confidence. Areas more synonymous with the resources sector have seen a substantial downturn in prices and rents; however, conditions appear to be flattening out in many of these markets as they rebalance. Regional service centres have shown more resilient conditions, depending on their level of economic diversity and local drivers.

# Broken Hill Dubbo Newcastle Gosford Sydney Wollongong

### Median prices across regional NSW

\* Based on postcode median house sale prices for 12 months to end September 2015.

### Regional NSW best performers

Ē	Rank	Suburb	\$	SOLD	Jowe P		Rank	Suburb	\$	SOLD	محمح
•	1	COONAMBLE	\$145,000	40	30.6%	¢ .	1	BOMADERRY	\$225,600	47	15.7%
<b>\$</b> -	2	HENTY	\$160,000	23	18.5%	Affordable —	2	NOWRA	\$208,000	20	14.9%
Affordable	3	GILGANDRA	\$179,000	49	17.4%		3	SOUTH TAMWORTH	\$180,000	15	12.5%
	1	PENROSE	\$450,000	17	26.8%	\$\$	1	ALBION PARK RAIL	\$336,000	35	18.9%
\$\$ -	2	DORA CREEK	\$457,500	50	23.8%		2	SHOAL BAY	\$364,500	32	17.6%
Mid range –	3	NORTH HAVEN	\$450,000	28	21.3%	Mid range	3	MANGERTON	\$370,000	23	16.5%
	1	HAMILTON EAST	\$1,055,000	18	45.9%		1	KEIRAVILLE	\$495,000	23	35.2%
\$\$\$	2	NEWCASTLE	\$854,000	16	44.7%	<b>\$\$\$</b>	2	HUSKISSON	\$580,000	17	29.6%
Prestige	3	MYOCUM	\$990,000	20	31.8%	Prestige	3	KAHIBAH	\$491,500	15	21.7%

Merimbula

Affordable = suburbs below 25th percentile Mid range = suburbs between 25th and 75th percentile Prestige = suburbs above 75th percentile

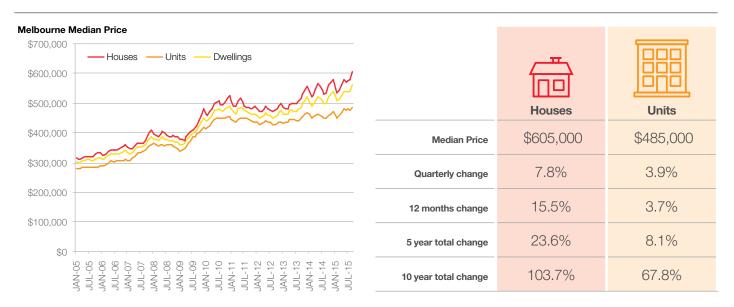
\$200k to \$300k \$0 to \$200k

# VICTORIA

# Migration drives Melbourne's growth

Melbourne's housing market has benefitted from strong economic conditions that are sheltered from the downturn in the mining sector. Population growth remains strong across Victoria and Melbourne, driven by high rates of interstate and overseas migration which is supporting housing demand. The capital gain performance has been much higher for houses compared with units over recent years, which likely reflects the higher supply levels keeping a cap on the overall pace of capital gain within the apartment sector. More recently, housing market conditions have shown some signs of moderating; however, values broadly continue to rise at a slower pace than earlier in the year.

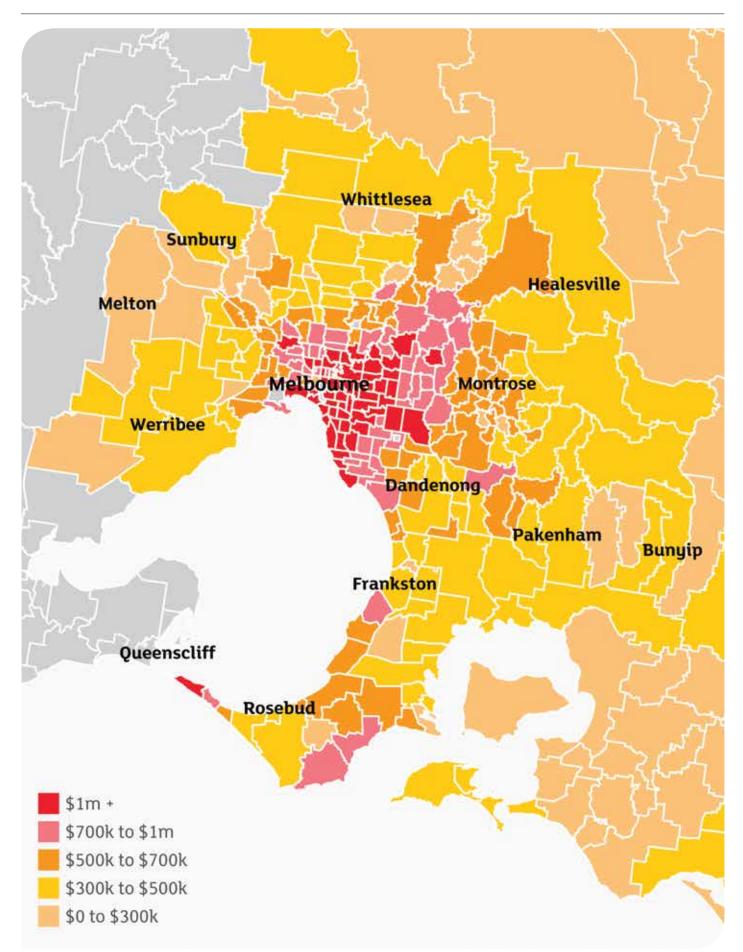
### Melbourne's performance over time



### Melbourne's best performers

Ē	Rank	Suburb	\$	SOLD	or of		Rank	Suburb	\$	SOLD	<b>م</b> حرم
	1	FRANKSTON NORTH	\$285,000	143	8.8%		1	WYNDHAM VALE	\$276,000	26	10.4%
\$ Affordable	2	DOVETON	\$330,000	186	6.5%	\$ Affordable	2	WERRIBEE	\$265,500	147	6.2%
	3	MILLGROVE	\$268,000	39	5.1%		3	HOPPERS CROSSING	\$271,500	39	4.0%
	1	YARRA GLEN	\$500,000	40	14.9%		1	RYE	\$405,000	17	22.7%
\$\$ Mid range	2	WILLIAMS LANDING	\$496,000	105	14.7%	\$\$ Mid range	2	POINT COOK	\$370,000	43	22.3%
<b>U</b> -	3	HADFIELD	\$515,000	111	12.9%	<b>.</b>	3	FLEMINGTON	\$398,750	61	15.5%
	1	MIDDLE PARK	\$2,243,750	64	34.4%		1	BALWYN	\$785,500	126	27.0%
<b>\$\$\$</b> Prestige	2	MONT ALBERT	\$1,821,000	59	29.5%	<b>\$\$\$</b> Prestige	2	TOORAK	\$935,000	218	20.5%
	3	CANTERBURY	\$2,374,000	127	23.2%		3	MCKINNON	\$780,000	39	14.5%

### Median prices across Melbourne



# How Melbourne and VIC regions compare

	\$0.5m	\$1.0m	\$1.5m	\$2.0m	\$2.5m	Number sold	Days on Market	12 month growth
Boroondara City		 		•	<b></b> •	2,424	29	15.7%
Inner Melbourne	I			l.	1	2,988	33	14.2%
Eastern Middle Melbourne				i i		6,325	29	19.4%
Southern Melbourne						5,450	31	10.1%
Northern Middle Melbourne	· •		1	I	I	3,281	30	6.7%
Eastern Outer Melbourne						3,582	18	14.1%
Moreland City						2,044	31	4.4%
Greater Dandenong City			1	1	1	1,688	32	11.9%
Western Melbourne						6,384	37	5.7%
Yarra Ranges Shire Part A				1	1	2,374	20	9.8%
Mornington Peninsula Shire					1	4,117	49	3.0%
East Barwon						1,698	78	0.0%
South Loddon		I	I	I	1	594	79	4.3%
Northern Outer Melbourne						3,310	39	3.5%
Frankston City		I		I	·	2,454	24	6.6%
South Eastern Outer Melbourne		1				6,390	24	5.8%
Hume City						2,982	35	5.3%
Melton-Wyndham						6,152	44	2.7%
Greater Geelong City Part A						3,011	43	1.4%
East Central Highlands			I			642	69	3.0%
Warrnambool City		I				459	65	-1.5%
Greater Bendigo City Part A						1,471	62	1.6%
Ballarat City						2,005	54	1.7%
West Gippsland						820	67	-3.2%
Wodonga		1		I	1	800	62	1.7%
South Gippsland						1,471	117	-3.0%
South West Goulburn						616	77	2.6%
West Barwon		I				455	57	2.6%
West Ovens-Murray		 				446	45	8.2%
East Gippsland Shire				1		719	111	-1.9%
Greater Shepparton City Part A						735	95	2.6%
East Ovens-Murray						235	112	0.0%
South Goulburn		1				434	91	-3.5%
North Loddon		I 				691	97	-1.1%
Mildura Rural City Part A		I				895	35	6.0%
North Goulburn						953	105	2.9%
Hopkins						376	95	6.1%
Wellington Shire					I	717	102	-4.3%
Latrobe Valley					I	1,219	88	-3.6%
West Central Highlands		1				191	126	11.1%
East Mallee		1				387	73	4.4%
Glenelg						432	121	-3.8%
South Wimmera		I		I	1	531	51	0.5%
North Wimmera						234	96	-5.5%
West Mallee		1				130	125	-2.2%

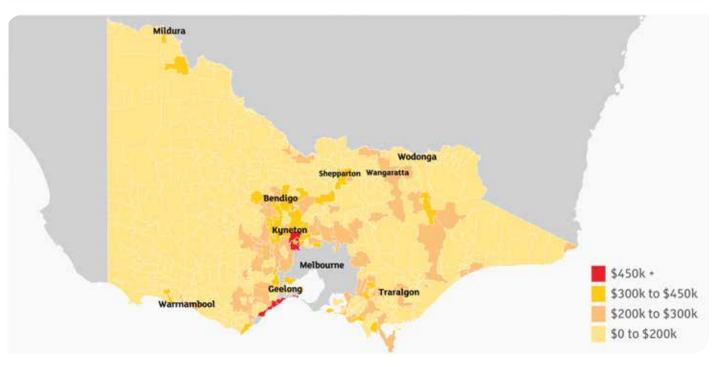
Lower range (25th percentile) Median price (50th percentile) Upper range (75th percentile)

# Moderate growth across regional Victoria

The regional areas of Victoria haven't seen as strong a growth trend as what has been evident in Melbourne; however, values are still broadly rising, albeit at a more moderate pace. Coastal markets appear to be

attracting more buyer demand, with more people looking for holiday homes and retirement options as wealth levels continue to recover after the global financial crisis.

### Median prices across regional VIC



<sup>\*</sup> Based on postcode median house sale prices for 12 months to end September 2015.

### Regional VIC best performers

Ē	Rank	Suburb	\$	SOLD	or of		Rank	Suburb	\$	SOLD	or of
•	1	TERANG	\$205,500	31	24.5%	•	1	LAKE WENDOUREE	\$660,000	55	22.2%
\$	2	TALLANGATTA	\$220,000	22	23.4%	<b>\$</b> -	2	NEWTOWN	\$663,500	180	12.9%
Affordable	3	ELMORE	\$212,000	13	22.2%	Affordable	3	BARWON HEADS	\$762,500	104	10.7%
	1	IRONBARK	\$327,500	23	19.7%		1	DRYSDALE	\$316,501	20	16.7%
<b>\$\$</b>	2	DENNINGTON	\$345,000	28	15.0%	<b>\$\$</b>	2	BELMONT	\$310,000	71	14.8%
Mid range	3	BEECHWORTH	\$325,000	51	14.0%	Mid range	3	CASTLEMAINE	\$307,000	18	11.6%
	1	LAKE WENDOUREE	\$660,000	55	22.2%		1	MANIFOLD HEIGHTS	\$335,000	21	34.0%
<b>\$\$\$</b>	2	NEWTOWN	\$663,500	180	12.9%	\$\$\$	2	LORNE	\$625,000	33	25.0%
Prestige	3	BARWON HEADS	\$762,500	104	10.7%	Prestige	3	ST LEONARDS	\$375,750	18	18.3%
\$ Rolling			\$762,500 umber sold (12 ma			onth change in med			\$375,750	18	18.3

# QUEENSLAND

# Affordability and buyer demand drives Brisbane

The pace of growth across the Brisbane housing market has been more sustainable than what has been evident in Sydney and Melbourne. Brisbane values haven't seen as much growth as the larger capital cities and the affordability of Brisbane's housing market, compared with Sydney and Melbourne, is now becoming one of it's most attractive features. This is beginning to attract buyers from interstate. Rental yields are also substantially higher than what can be found in the other major capital cities. Transaction numbers are trending higher across the Brisbane housing market which means buyer demand is continuing to improve.

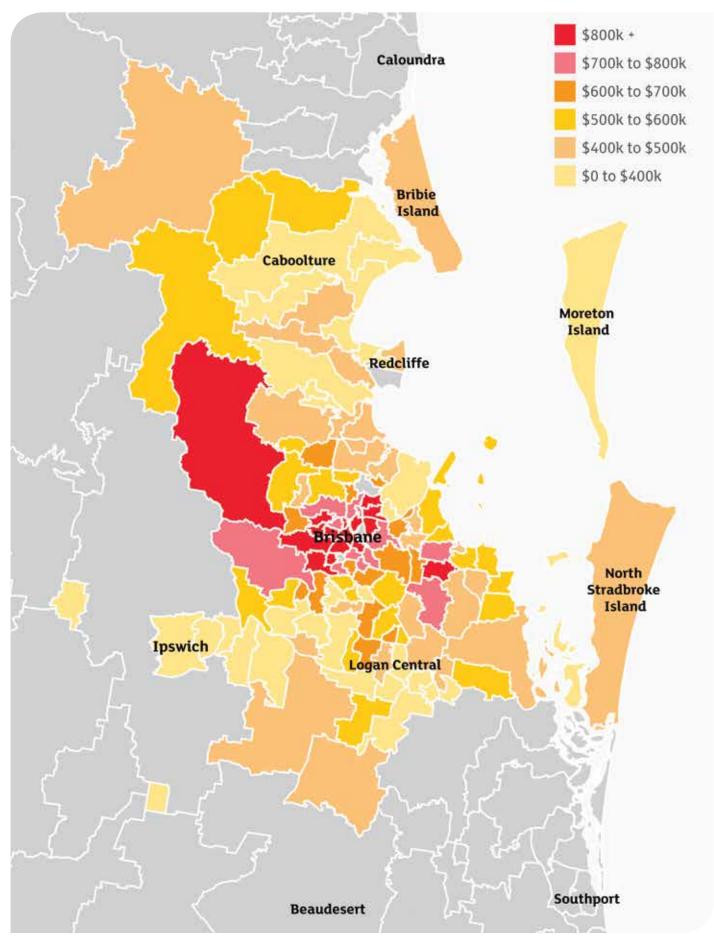
### Brisbane's performance over time



### Brisbane's best performers

Ē	Rank	Suburb	\$	SOLD	Jan Star		Rank	Suburb	\$	SOLD	<u>مر</u>
	1	DINMORE	\$222,000	12	23.3%		1	HILLCREST	\$229,000	32	5.2%
\$	2	BASIN POCKET	\$245,000	23	22.5%	\$ Affordable	2	BEENLEIGH	\$187,000	74	4.5%
	3	MACLEAY ISLAND	\$230,000	71	13.6%		3	WOODRIDGE	\$189,000	179	4.4%
	1	NORTH MACLEAN	\$486,000	16	14.4%		1	ARANA HILLS	\$388,000	27	10.9%
\$\$ Mid range	2	BAHRS SCRUB	\$497,500	32	11.6%	\$\$ Mid range	2	GORDON PARK	\$395,000	49	5.3%
	3	ARANA HILLS	\$489,560	111	7.8%		3	EIGHT MILE PLAINS	\$405,000	122	2.5%
	1	HIGHGATE HILL	\$1,092,500	52	28.5%		1	BARDON	\$640,000	22	18.8%
<b>\$\$\$</b> Prestige	2	ST LUCIA	\$1,150,000	68	19.2%	<b>\$\$\$</b> Prestige	2	MILTON	\$530,000	33	15.2%
	3	HAMILTON	\$1,197,500	88	18.3%		3	HAWTHORNE	\$550,000	57	10.6%

### Median prices across Brisbane



# QUEENSLAND

# How Brisbane and QLD regions compare

Southeast Inner Brisbane2,746289.2%Gold Coast East2,4664311.1%Southeast Outer Brisbane4,502285.1%		\$0.2m	\$0.4m	\$0.6m	\$0.8m	\$1.0m	\$1.2m	\$1.4m	Number sold	Days on Market	12 month growth
Southeast Inner Brisbane       2,746       28       9,2%         Gold Coast East       2,466       43       11,1%         Southeast Outer Brisbane       4,02       8.4       6.3%         Gold Coast West       4,01       4.9%       4.71       49       4.7%         Surshine Coast       8.1       6.104       3.3       4.1%         Northwest Outer Brisbane       1,965       8.0       6.2%       4.3%         Surshine Coast SD Bd       1,965       8.0       6.2%       4.3%         Brodiand City       1,965       8.0       6.2%       3.3%       4.4%         Gold Coast SD Bd       1,965       8.0       2.2%       4.4%       4.3%         Gold Coast SD Bd       2,465       37       7.6%	Inner Brisbane	1							777	35	4.9%
Cold Coast East       2.466       .43       1.11%         Southeast Outer Brishane       5.3%       .40       .5%         Gald Coast West       5.4%       .4,711       .4,741       .4,741         Surshine Coast SD Bal       6.104       .38       .44,711       .4,741       .4,741         Northwest Outer Brishane       .5%       .6,104       .38       .4,1%       .4,741       .4,	Northwest Inner Brisbane			<b> </b>				1	2,857	34	6.3%
Souther Britsame       Image: Souther Britsame	Southeast Inner Brisbane	I	1	· •			I		2,746	28	9.2%
Gold Coast West       Image: Coast Supplies       Image: Coast Supplies </td <td>Gold Coast East</td> <td></td> <td>1</td> <td></td> <td></td> <td></td> <td></td> <td>1</td> <td>2,466</td> <td>43</td> <td>11.1%</td>	Gold Coast East		1					1	2,466	43	11.1%
Sunshine Coast       Image: Sunshine Coast <td>Southeast Outer Brisbane</td> <td></td> <td></td> <td></td> <td>•</td> <td></td> <td></td> <td></td> <td>4,502</td> <td>28</td> <td>5.1%</td>	Southeast Outer Brisbane				•				4,502	28	5.1%
Northwest Outer Bisbane       Image: Surshine Coast SD Bal	Gold Coast West		1		1	1	1		5,438	41	6.3%
Redard City       Image: Const SD Bal	Sunshine Coast								4,711	49	4.7%
Surshine Coast SD Bal       Image: Surshine Coast SD SUrshine SD Bal       Image: Surshine Coast SD SUrshine SD Bal       Image: Surshine Coast SD SUrshine SD SUrshine SD Bal       Image: Surshine SD SUrshine SD SUrshine SD Bal       Image: Surshine SD SUrshine SD SUrshine SD SUrshine SD Bal       Image: Surshine SD SUrshin	Northwest Outer Brisbane	I	!		I		1	1	6,104	33	4.1%
Pine Rivers       Image: Source	Redland City				1		1	1	2,816	44	4.3%
Reddiffe       Image: Sector Sec	Sunshine Coast SD Bal							1	1,985	80	5.2%
Caims       A <td>Pine Rivers</td> <td>I</td> <td>-</td> <td></td> <td>I</td> <td>1</td> <td>1</td> <td></td> <td>3,391</td> <td>36</td> <td>2.2%</td>	Pine Rivers	I	-		I	1	1		3,391	36	2.2%
Gold Coast SD Bal       Image: SD	Redcliffe								1,093	37	4.4%
Toowoomba       Image: Sector Se	Cairns	l			l		I.	1	2,456	37	6.7%
Mackay	Gold Coast SD Bal	1					1	1	92	111	0.8%
Logan City       Image: City City City City City City City City	Toowoomba			•					2,493	33	5.8%
Gladstone       Image: Chick of the constraint of the constrai	Mackay	I			1		1	1	817	76	-7.6%
Caboolture       Image: Ca	Logan City			•				1	5,127	44	3.3%
Townsville City Part A       Image: Compart A       Image: Comparte       Image: Compart A	Gladstone	1		•				1	597	60	-9.5%
Townsville City Part A       Image: A marked B marked	Caboolture	1		•	1	1	1	1	3,122	53	2.8%
Lower West Moreton       Image: Sector	Townsville City Part B								956	75	-3.4%
Hervey Bay       Hervey Bay       Image: Comparison of the two states of the two states of the two states of the two states of two stat	Townsville City Part A	l			I		ļ	1	1,352	56	-3.7%
Ipswich City       Ipswich City <td< td=""><td>Lower West Moreton</td><td>1</td><td></td><td>-</td><td>1</td><td>1</td><td>1</td><td>1</td><td>1,226</td><td>94</td><td>3.6%</td></td<>	Lower West Moreton	1		-	1	1	1	1	1,226	94	3.6%
Far North SD Bal       Image: Solution of the sector of the	Hervey Bay							1	1,233	77	0.9%
Rockhampton       Mackay SD Bal       Mackay SD Bal <td>lpswich City</td> <td>1</td> <td></td> <td> </td> <td>1</td> <td> </td> <td>1</td> <td>1</td> <td>3,357</td> <td>53</td> <td>4.2%</td>	lpswich City	1			1		1	1	3,357	53	4.2%
Mackay SD BalMackay	Far North SD Bal								1,409	97	2.5%
Fitzroy SD Bal Image: Somerset   Somerset Image: Somerset   Bundaberg Image: Somerset   North West Image: Somerset   Darling Downs SD Bal Image: Somerset   Wide Bay-Burnett SD Bal Image: Somerset   Northern SD Bal Image: Somerset   Central West Image: Somerset	Rockhampton				1		1	1	894	71	-2.5%
SomersetSomerset390126-0.8%BundabergBundaberg1,02569-0.4%North West19190-0.8%Darling Downs SD Bal1,56376-0.4%Wide Bay-Burnett SD Bal1,563762,51689Northern SD Bal1,563600106-2.3%Central West112,3%33%115	Mackay SD Bal				1		1	1	677	105	-8.8%
BundabergImage: Constraint of the second of the	Fitzroy SD Bal	1						1	938	96	-8.1%
North WestImage: Constraint of the constr	Somerset	1			I		I	1	390	126	-0.8%
Darling Downs SD BalImage: Constraint of the second se	Bundaberg							1	1,025	69	-0.4%
Wide Bay-Burnett SD Bal2,516891.1%Northern SD Bal600106-2.3%Central West6001152.3%	North West								191	90	-0.8%
Northern SD Bal       600       106       -2.3%         Central West       83       115       2.3%	Darling Downs SD Bal	I 🔶			1		1	1	1,563	76	-0.4%
Central West 6 6 6 83 115 2.3%	Wide Bay-Burnett SD Bal								2,516	89	1.1%
	Northern SD Bal	!						1	600	106	-2.3%
South West	Central West						1		83	115	2.3%
	South West	••							232	110	-9.1%

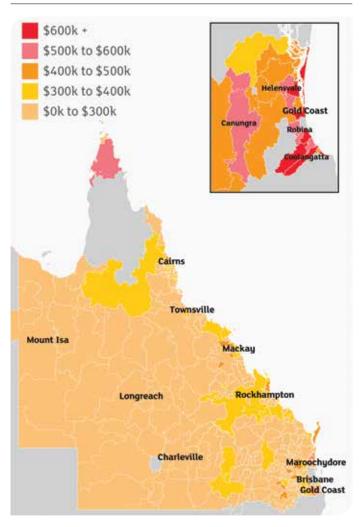
Lower range (25th percentile) — Median price (50th percentile) — Upper range (75th percentile)

# Coastal Queensland bounces back

The iconic coastal markets along the eastern coastline are showing a solid bounce back in growth conditions after dwelling values and transaction numbers slumped during and after the global financial crisis. In contrast, the resource driven markets of regional Queensland are continuing to face tough conditions as capital expenditure winds down and commodity prices flatten out.

Regional service centres have been more resilient than the mining communities; however, it is broadly the coastal and lifestyle markets where housing market conditions are the most buoyant.

### Median prices across regional QLD



\* Based on postcode median house sale prices for 12 months to end September 2015.

Ē	Rank	Suburb	\$	SOLD	Josef Contraction		Rank	Suburb	\$	SOLD	محر
•	1	CHARLEVILLE	\$149,000	42	21.6%	¢	1	EDMONTON	\$183,097	33	32.2%
\$	2	DEPOT HILL	\$167,500	14	8.1%	$\mathbf{\Phi}$	2	WOREE	\$133,500	82	16.1%
Affordable	3	HOME HILL	\$181,000	20	6.5%	Affordable	3	HOLLOWAYS BEACH	\$194,000	23	13.5%
<b></b>	1	VETERAN	\$417,500	20	21.5%		1	EAST TOOWOOMBA	\$357,000	62	28.6%
<b>\$\$</b>	2	MACHANS BEACH	\$416,250	22	21.4%	<b>\$\$</b>	2	MOUNT COOLUM	\$345,000	81	19.8%
Mid range	3	WONGALING BEACH	\$411,000	14	17.4%	Mid range	3	MOUNT LOFTY	\$350,000	22	16.7%
<b>**</b>	1	TANAWHA	\$883,000	28	23.1%		1	SOUTH TOWNSVILLE	\$518,951	52	43.8%
<b>\$\$\$</b>	2	CURRUMBIN	\$900,000	30	21.2%	<b>\$\$\$</b>	2	MOFFAT BEACH	\$500,000	29	29.9%
Prestige	3	MERMAID BEACH	\$1,065,000	80	20.3%	Prestige	3	HOPE ISLAND	\$540,000	593	17.4%

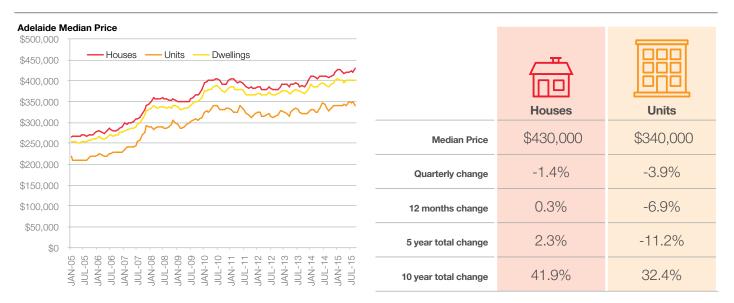
### Regional QLD best performers

# SOUTH AUSTRALIA

# Sensible and steady growth for Adelaide

The Adelaide housing market has been a relatively steady performer, with dwelling values rising at a slightly higher pace than inflation over the past several years. This has seen home values in Adelaide increase by approximatively 12% since 2009. Positively, transaction numbers have increased over the past year indicating an improvement in buyer demand, despite relatively soft economic conditions across the state. Rental yields remain higher than the national capital city average, which may be attractive to prospective investors attracted to Adelaide's affordable housing stock and higher yield profile.

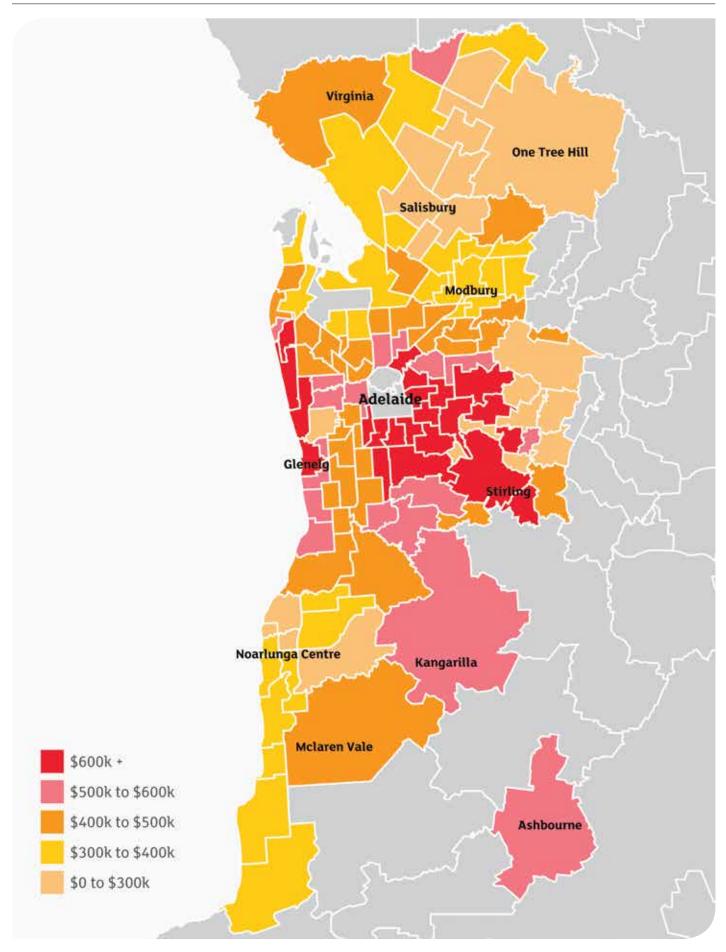
### Adelaide's performance over time



### Adelaide's best performers

Ē	Rank	Suburb	\$	SOLD	So a		Rank	Suburb	\$	SOLD	Jose P
	1	HACKHAM WEST	\$246,000	86	6.5%		1	ELIZABETH EAST	\$152,000	33	7.6%
\$ Affordable	2	ELIZABETH GROVE	\$210,000	28	5.3%	\$ Affordable	2	DAVOREN PARK	\$138,000	33	6.2%
	3	DAVOREN PARK	\$183,975	112	4.5%		3	SALISBURY EAST	\$200,000	32	2.6%
	1	DARLINGTON	\$477,500	14	24.0%		1	EVERARD PARK	\$341,000	19	26.1%
\$\$ Mid range	2	MARLESTON	\$485,000	32	13.6%	\$\$ Mid range	2	SEATON	\$330,000	58	15.8%
	3	SEACOMBE HEIGHTS	\$476,500	29	10.8%		3	RICHMOND	\$340,000	28	12.0%
	1	KINGSWOOD	\$960,000	31	27.2%		1	GLENELG SOUTH	\$472,500	28	37.0%
<b>\$\$\$</b> Prestige	2	SAINT PETERS	\$1,130,000	49	15.9%	\$\$\$ Prestige	2	SEACLIFF	\$470,000	30	19.0%
	3	TOORAK GARDENS	\$1,275,000	42	10.6%		3	GLENGOWRIE	\$540,050	59	19.0%

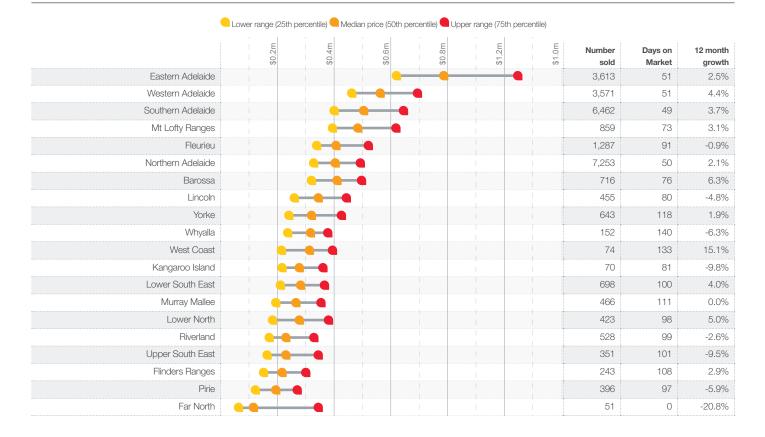
### Median prices across Adelaide



\* Based on postcode median house sale prices for 12 months to end September 2015.

# **SOUTH AUSTRALIA**

### How Adelaide and SA regions compare





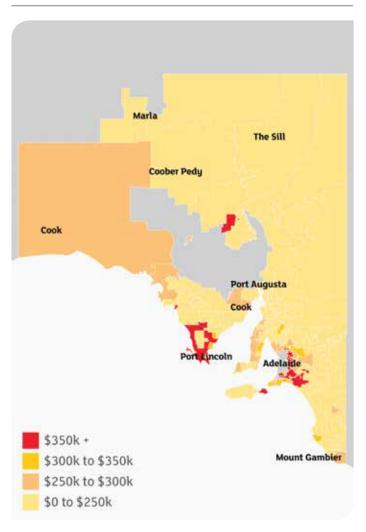
# Lifestyle options driving regional SA growth

The regions outside of Adelaide can broadly be described as being lifestyle, agriculture or resource driven markets. The lifestyle markets are seeing some improvement in local housing conditions as sea changers and holiday home buyers become more active in the market.

Agricultural areas are generally dependent on weather conditions; however, the wine regions are also benefitting from an increase in lifestyle demand.

Resource driven markets continue to be challenged by low commodity prices and a lack of capital expenditure, which is keeping housing market conditions relatively subdued in these areas.

### Median prices across regional SA



\* Based on postcode median house sale prices for 12 months to end September 2015.

Ē	Rank	Suburb	\$	SOLD	Jord	Ra	<b>nk</b> Suburb	\$	SOLD	Sod
•	1	TAILEM BEND	\$175,000	41	14.8%	1	MURRAY BRIDGE	\$187,500	37	10.3%
\$	2	RENMARK	\$197,500	79	6.2%		MONIAT BRIDGE	φ107,000	01	10.070
Affordable	3	SOLOMONTOWN	\$122,500	22	3.8%	2	WHYALLA STUART	\$132,500	22	9.5%
	1	STANSBURY	\$340,000	22	47.8%					
<b>\$\$</b>	2	LYNDOCH	\$345,000	44	9.2%	3	VICTOR HARBOR	\$239,300	23	8.8%
Mid range	3	PORT VINCENT	\$339,500	29	8.6%					
	1	RIVERGLADES	\$385,000	17	44.9%	4	PORT LINCOLN	\$225,000	66	7.1%
<b>\$\$\$</b>	2	WILLIAMSTOWN	\$384,000	43	23.9%					
Prestige	3	GUMERACHA	\$401,000	13	13.0%	5	WHYALLA NORRIE	\$170,000	37	6.3%

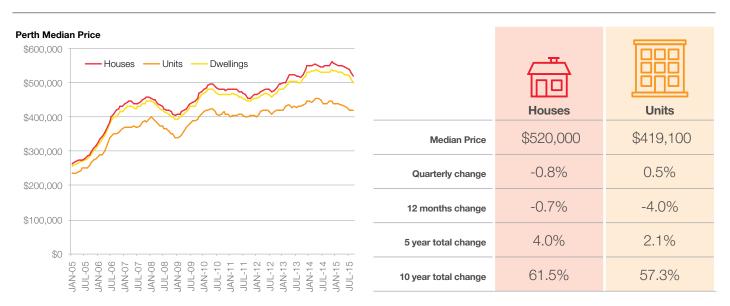
### Regional SA best performers

# **WESTERN AUSTRALIA**

# Buyer demand eases in Perth after exceptional highs

The Perth housing market is just over a year into a down phase after housing market conditions were exceptionally strong during the mining related infrastructure boom. With population growth moderating and economic conditions softening across the state, buyer demand has also eased off, which has resulted in fewer transactions over the past 12 months. Rental markets have also weakened with Perth rents falling by just over 6% during the past year. As the market transitions in favour of buyers, stock levels have risen providing more choice and less urgency in the decision-making process for buyers.

### Perth's performance over time

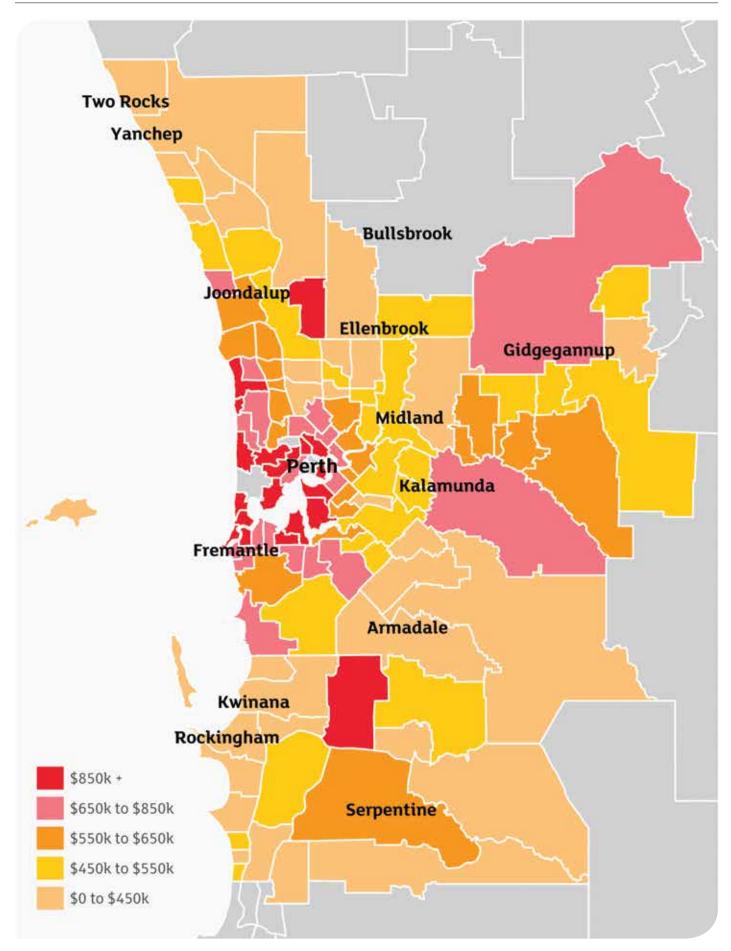


### Perth's best performers

Ē	Rank	Suburb	\$	SOLD	<b>e</b>		Rank	Suburb	\$	SOLD	Sod
	1	BELLEVUE	\$395,000	33	7.3%		1	ARMADALE	\$311,750	75	10.9%
\$ Affordable	2	KELMSCOTT	\$390,000	228	6.8%	\$ Affordable	2	SHOALWATER	\$290,000	35	5.5%
	3	MADDINGTON	\$386,000	194	3.8%		3	ORELIA	\$205,000	20	4.1%
	1	GREENMOUNT	\$525,000	49	10.5%		1	RIVERVALE	\$428,000	126	7.7%
<b>\$\$</b> Mid range	2	KIARA	\$510,000	27	7.9%	\$\$ Mid range	2	MOSMAN PARK	\$425,000	68	6.3%
	3	BULLSBROOK	\$512,750	73	4.6%		3	SORRENTO	\$445,000	25	5.0%
	1	WATERFORD	\$1,135,000	26	14.4%		1	NORTH COOGEE	\$662,000	47	32.4%
<b>\$\$\$</b> Prestige	2	MOUNT CLAREMONT	\$1,390,000	82	8.6%	<b>\$\$\$</b> Prestige	2	CRAWLEY	\$770,000	53	23.2%
	3	EAST PERTH	\$1,230,000	19	8.4%		3	BURSWOOD	\$800,000	49	20.7%

Rolling Median Price (12 months) SUP Number sold (12 months) 21 month change in median price

### Median prices across Perth



\* Based on postcode median house sale prices for 12 months to end September 2015.

# WESTERN AUSTRALIA

# How Perth and WA regions compare

	\$0.2m	\$0.4m	\$0.6m	\$0.8m	\$1.0m	\$1.2m	\$1.4m	\$1.6m	\$1.8m	Number sold	Days on Market	12 month
Central Metropolitan	Ģ	÷ ÷	õ	õ	69	69	69	69	69	1,618	Market 41	<b>growth</b> -3.8%
De Grey									-	132	95	-13.0%
North Metropolitan										9,068	42	0.0%
Fitzroy							1	1		167	93	-6.0%
East Metropolitan										4,878	44	1.0%
Vasse										979	69	4.1%
South West Metropolitan										6,487	48	0.0%
South East Metropolitan										6,280	40	-1.9%
Ord			•			1	1	1		34	89	2.4%
Fortescue										192	71	-28.9%
Mandurah			-		 	1	1	I		2,079	66	1.2%
Bunbury						i		i		1,130	76	1.3%
King			•					 		664	88	4.0%
Moore						1	I	I	I	257	118	-8.0%
Geraldton										448	100	-2.9%
Gascoyne										80	145	-18.2%
Kalgoorlie/Boulder City Part A							1	1		374	75	-1.4%
Preston										584	87	-0.6%
Johnston			Ì.		I	1	I	I	1	184	94	-1.4%
Blackwood									1	226	109	13.3%
Avon							-	1		288	103	2.3%
Greenough River	1		1			1	I	1		176	120	-3.9%
Hotham										174	84	9.8%
Pallinup							ļ	l		116	125	-8.6%
Campion		I			1					109	134	-5.2%
Lefroy										58	104	-20.3%
Lakes						1			I	44	106	-29.4%
Carnegie										28	0	-38.9%

Lower range (25th percentile) Median price (50th percentile) Upper range (75th percentile)

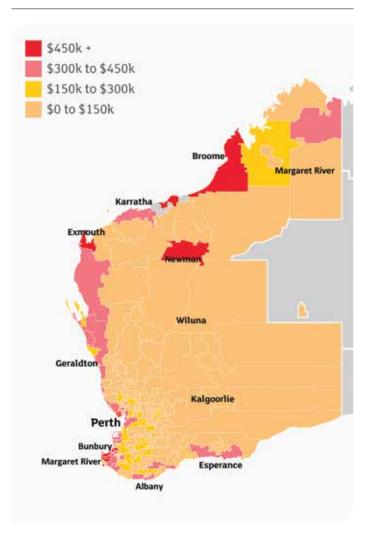


# Lifestyle strong, but resource areas weaker in regional WA

The housing markets located in mining areas of regional Western Australia are continuing to transition away from the boom conditions which peaked back in 2012/13. After recording an extraordinary rate of capital gain, dwelling values across the resource intensive areas of the state have continued to rebalance.

On the other hand, lifestyle regions have broadly bucked the softening trend, recording healthier market conditions, with prices rising and transaction numbers also showing an increase over the past year.

### Median prices across regional WA



\* Based on postcode median house sale prices for 12 months to end September 2015.

Rank	Suburb	\$	SOLD	ere a	Ranl	Suburb	\$	SOLD	محرم
1	WAGIN	\$195,000	34	41.8%	1	DUNSBOROUGH	\$535,000	31	16.7%
2	FURNISSDALE	\$477,500	20	38.4%					
 3	BOYANUP	\$445,000	17	33.0%	2	MARGARET RIVER	\$320,000	43	8.8%
 4	PELICAN POINT	\$637,500	21	26.2%					
 5	PEMBERTON	\$333,000	19	20.7%	3	WEST BUSSELTON	\$365,000	36	4.6%

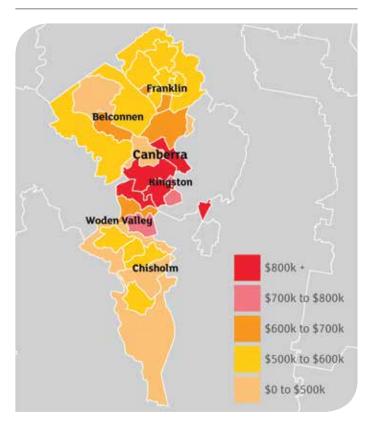
### Regional WA best performers

# **AUSTRALIAN CAPITAL TERRITORY**

# Values rise in Canberra

Canberra housing market conditions have seen some improvement over the year as housing supply is absorbed and local confidence improves. Dwelling values are once again starting to rise, mostly due to higher house prices rather than unit prices. As market conditions gradually improve, transaction numbers have risen over the past 12 months as buyers become more confident in the local market. Canberra rental yields remain higher than the capital city average, which may be attractive to investors interested in taking a stake in the housing market of the nation's capital.

### Median prices across ACT



### ACT's performance over time

	Houses	Units
Median Price	\$599,500	\$405,000
Quarterly change	-0.4%	-0.5%
12 months change	1.1%	-6.2%
5 year total change	5.3%	-5.9%
10 year total change	47.2%	26.6%

### ACT's best performers

Ran	<b>k</b> Top	o Ranked Suburb	\$	SOLD	Prod
	1	CASEY	\$565,000	169	33.0%
	2	WESTON	\$685,000	47	24.0%
	3	AINSLIE	\$832,500	48	19.8%
Ban					
Ran	k Top	o Ranked Suburb	\$	SOLD	000
	<b>к</b> Тор 1	o Ranked Suburb	\$478,750	<b>SOLD</b> 104	12.0%
	- 1				12.0% 10.6%
	1	CITY	\$478,750	104	

\* Based on postcode median house sale prices for 12 months to end September 2015.

### How ACT regions compare

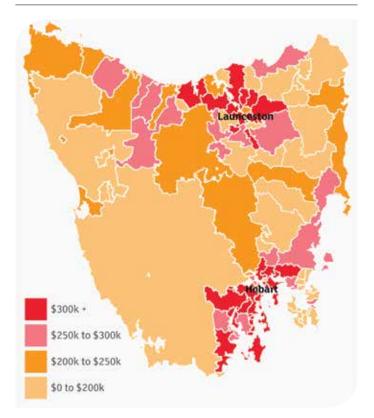
•	Low	er rang	e (25th pe	rcentil	le) <mark>–</mark> Media	an price (50th	percentile)	Upper rang	ie (75th pe	rcentile	)			
		\$0.2m		114.0¢	\$0.6m	\$0.8m	\$1.0m	\$1.2m	\$1.4m		\$1.6m	Number sold	Days on Market	12 month growth
South Canberra					1				-			258	48	12.9%
North Canberra												384	43	7.7%
Woden Valley								I				317	53	9.7%
Weston Creek-Stromlo												351	51	3.9%
Tuggeranong							1		I			983	49	1.0%
Gungahlin-Hall						•	1	1				1,072	49	5.9%
Belconnen								1	I			970	45	4.0%

# TASMANIA

# Dwelling values steady Hobart

Dwelling values across Hobart have held relatively steady over the past seven years and currently remain at approximately the same level as they were at the beginning of 2009. The steady value position means that Hobart housing is well and truly the most affordable amongst the capital cities. At the same time, rents have been gradually rising, which has pushed rental yields across Hobart to be the highest of any capital city for houses and second highest (after Darwin) for units. The past year has seen transaction numbers rise across Hobart, indicating an improvement in buyer demand as more buyers become active in the local housing market.

### Median prices across Tasmania



### Hobart's performance over time

	Houses	Units
Median Price	\$330,000	\$290,000
Quarterly change	-2.3%	1.2%
12 months change	-0.6%	3.7%
5 year total change	-7.4%	8.8%
10 year total change	12.8%	33.8%

### Tasmania's best performers

Ran	ık	Top Ranked Suburb	\$	SOLD	or a la
	1	KETTERING	\$557,500	17	36.8%
	2	SOUTH ARM	\$390,000	23	23.6%
	3	PRIMROSE SANDS	\$218,000	35	22.5%
Ran	k	Top Ranked Suburb	\$	SOLD	Jowe P
	1	MOUNT NELSON	\$260,000	20	16.6%
	2	WEST HOBART	\$347,000	37	11.0%
				40	7.5%
	3	LAUNCESTON	\$331,250	40	7.070

\* Based on postcode median house sale prices for 12 months to end September 2015.

### How Tasmanian regions compare

(	Cover range (25th percentile) — Median price (50th percentile) — Upper range (75th percentile)														
		\$100k	\$2000	2004		\$300k		\$400k		\$500k		\$600k	Number sold	Days on Market	12 month growth
Greater Hobart							-						3,375	50	0.1%
Greater Launceston													1,643	64	4.8%
Burnie-Devonport			!			-							1,250	95	0.5%
Southern													898	88	0.0%
North Western Rural			-		-		-						388	90	9.0%
Central North							l i						508	77	9.3%
North Eastern			•	•									249	105	-3.6%
Lyell	H												118	102	-2.7%

# NORTHERN TERRITORY

# Darwin eases off

The Darwin housing market has recorded one of the highest long term rates of capital gain amongst the nation's capital city housing markets; however, dwelling values have been trending lower over the past year as large infrastructure projects approach the completion of the construction stage. Buyer demand has eased off at a time when listing numbers have risen, which is providing prospective buyers with strong buying conditions and plenty of choice in the market. Despite the downturn in values, Darwin rental yields remain amongst the highest of any capital city.

# Darwin Katherine Borroloola \$600k \* \$500k to \$600 \$400k to \$500k \$0 to \$400k

### Median prices across NT

### Darwin's performance over time

	Houses	Units
Median Price	\$590,000	\$480,000
Quarterly change	4.0%	-13.3%
12 months change	-3.1%	-7.4%
5 year total change	-6.3%	-14.7%
10 year total change	90.9%	67.9%

### NT's best performers

Ē			\$	SOLD	محمح						
	Rank	Top Ranked Suburb									
	1	NIGHTCLIFF	\$850,000	36	35.4%						
	2	KATHERINE SOUTH	\$350,000	23	16.7%						
	3	STUART PARK	\$770,000	29	10.0%						
	Rank	Top Ranked Suburb	\$	SOLD	<b>م</b> حر <b>م</b>						
	1	LARAPINTA	\$359,500	22	19.8%						
	2	FANNIE BAY	\$642,500	36	19.2%						
	3	BRAITLING	\$308,000	10	16.2%						
Rolling Median Price (12 months) SOLD Number sold (12 months)											

\* Based on postcode median house sale prices for 12 months to end September 2015.

### How NT regions compare

	Lov	wer rang	ge (25t	h perc	centile)	Mec	dian prio	ce (50t	h per	centile)	U	pper	range	(75th	percer	ntile)				
		\$100k		\$200k		\$300K	\$400k		\$500k		\$600k		\$700k		\$800k		\$900k	Number sold	Days on Market	12 month growth
Darwin City							1			-	-			-				751	66	-1.7%
Litchfield												•		-				228	78	-4.2%
Central NT										-								352	66	0.0%
Palmerston-East Arm										•								683	77	2.2%
Lower Top End NT						-												115	77	7.4%
Finniss				•														49	174	-6.7%
Barkly						•												26	112	-5.0%

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