

**PRD.**  REAL ESTATE



**Smart Moves: Capital Cities Edition**  
Brisbane Metro 2<sup>nd</sup> Half 2025

## OVERVIEW

Buying near Brisbane doesn't have to mean sacrificing lifestyle or future value. This report showcases key suburbs within 20km of the CBD that deliver the perfect mix of affordability, strong rental yields, and easy access to essentials like schools, transport, parks, and vibrant shopping precincts.

### What the Data is Telling Us

Brisbane is on the move and fast. Median house prices have surged 8.1% to \$1.06M, while units jumped 12.4% to \$755K, pushing Brisbane past Melbourne as Australia's second most expensive capital city. But here's the catch: sales are down for houses by -5.2%, and for units by -23%. That's not a demand problem; it's a supply crunch. Fewer listings mean buyers are competing harder, and prices are climbing.

### The Supply Gap and the Opportunity

The pipeline for 2025 looks big (\$4B in planned projects) but dig deeper and you'll see the imbalance. Most new stock will be units (2,269) and townhouses (359), plus 1,426 land lots, while only seven stand-alone houses are planned. This shortage of detached homes will keep house prices rising, while units offer a more affordable entry point and strong growth potential.

Rental demand is another story: vacancy is just 1.0%, rents are climbing, and yields are healthy 4.1% for units, 3.1% for houses. Investors are seeing a market that's tight, resilient, and outperforming Sydney and Melbourne.

### Who This Guide Is For

Buyers who want to act before prices climb further.

Investors chasing strong rental returns and low vacancy.

First-home buyers looking for suburbs that balance affordability, growth, and lifestyle.

The suburbs spotlighted in this report aren't just names on a map; they're opportunities in a market where timing matters.

Bottom line: Brisbane is a seller's market with shrinking affordable stock and billions in infrastructure shaping its future. The question isn't if prices will rise, it's whether you'll make your move before they do.

## BRISBANE METRO AT A GLANCE

### ANNUAL CHANGE ^



SALES ↓  
MEDIAN PRICE ↑  
RENTAL PRICE ↑



SALES ↓  
MEDIAN PRICE ↑  
RENTAL PRICE ↑



UNEMPLOYMENT  
RATE  
4.2%



AVERAGE  
HOME LOAN  
\$661,590



VACANCY RATE  
1.0%

### HOUSES



#### MEDIAN SALE PRICE

\$1.06M

#### MEDIAN RENTAL PRICE

\$700

#### YIELDS

3.1%

### UNITS



\$755K

\$650

4.1%

\*The median price quoted captures sale transactions from 1<sup>st</sup> January to 30<sup>th</sup> September 2025, or Q1 - Q3 2025. \*\*The average home loan figure is derived from the June Quarter 2025 Housing Affordability Report by the Real Estate Institute of Australia (REIA) and Adelaide Bank. \*\*\*Project development is based on the aggregate of estimated construction value for residential, commercial, industrial, mixed-use and infrastructure projects scheduled to commence construction in 2025, as stated by the relevant data authority. ^Annual change is reflective of median price change from Q3 2024 to Q3 2025. Figures displayed in infographics are for the period Q3 2025. Source: APM Pricerfinder, REIA, SQM Research, Cordell Connect, Department of Jobs and Small Business. © PRD 2025.



## PRD. METHODOLOGY

This Smart Moves: Capital Cities Edition for Brisbane Metro analyses all suburbs within a 20km radius of the Brisbane CBD. The following criteria were considered:

- **Property trends criteria** – all suburbs have a minimum of 20 sales transactions for statistical reliability purposes. Based on market conditions, suburbs have either positive or as close as possible to neutral price growth between 2024 and 2025\*.
- **Investment criteria** – as of September 2025, suburbs chosen will have an on-par or higher rental yield than Brisbane Metro and an on-par or lower vacancy rate.
- **Affordability criteria** – chosen affordable and liveable suburbs have a median price below the relevant capital city metro area, which in this report is Brisbane Metro. We calculated the percentage premiums that needed to be added to the Queensland (QLD) average home loan, which was \$661,590\*\* as of June Quarter 2025. Premiums of 28.5% for houses and 2.8% for units were needed to reach the median price of suburbs chosen in this report. This percentage is below what is required to reach Brisbane Metro's median prices (60.5% for houses and 14.1% for units). This makes the chosen suburbs identified in this report more affordable to buyers, creating an opportunity for first home buyers.
- **Development criteria** – suburbs chosen have new developments commencing construction for 2025, with a high proportion of commercial and infrastructure projects. This ensures the suburbs show signs of sustainable economic growth. Suburbs chosen must also show a reasonable amount of new ready-to-sell stock planned for construction to ensure buyers have access to some new supply.
- **Liveability criteria** – all identified suburbs have low crime rates, availability of amenities within a 5km radius (i.e., schools, green spaces, public transport, shopping centres and health care facilities), and an unemployment rate on par or lower in comparison to the QLD average (as determined by the Department of Jobs and Small Business, June Quarter 2025 release).

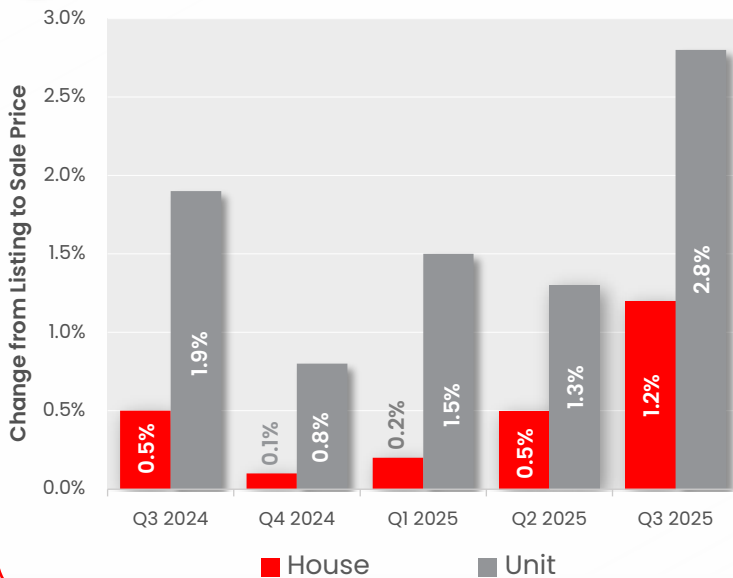
## TOP 10 PERFORMING SUBURBS WITHIN 20KM FROM THE BRISBANE CBD

Area	Suburb	Type	Median Price 2024	Median Price 2025*	Price Growth	Projects 2025***
Inner	Alderley	House	\$1,410,000	\$1,670,000	18.4%	\$9.5M
	Brisbane City	Unit	\$615,000	\$804,000	30.7%	\$1.0M
North	Banyo	House	\$960,000	\$1,135,000	18.2%	\$5.0M
	Lawnton	Unit	\$505,000	\$620,000	22.8%	5.2M
South	Coopers Plains	House	\$957,500	\$1,210,000	26.4%	\$422.1M
	Holland Park West	Unit	\$635,000	\$820,000	29.1%	\$3.0M
East	Wynnum West	House	\$983,000	\$1,150,000	17.0%	\$500K
	Alexandra Hills	Unit	\$670,000	\$888,333	32.6%	\$800K
West	Karalee	House	\$965,000	\$1,175,000	21.8%	\$450K
	Arana Hills	Unit	\$780,880	\$877,750	12.4%	\$9.0M

\*The median price quoted captures sale transactions from 1<sup>st</sup> January to 30<sup>th</sup> September 2025, or Q1 – Q3 2025. \*\*The average home loan figure is derived from the June Quarter 2025 Housing Affordability Report by the Real Estate Institute of Australia (REIA) and Adelaide Bank. \*\*\*Project development is based on the aggregate of estimated construction value for residential, commercial, industrial, mixed-use and infrastructure projects scheduled to commence construction in 2025, as stated by the relevant data authority. ^Annual change is reflective of median price change from Q3 2024 to Q3 2025. Figures displayed in infographics are for the period Q3 2025. Source: APM Pricerfinder, REIA, SQM Research, Cordell Connect, Department of Jobs and Small Business. © PRD 2025.

%

## AVERAGE VENDOR DISCOUNT

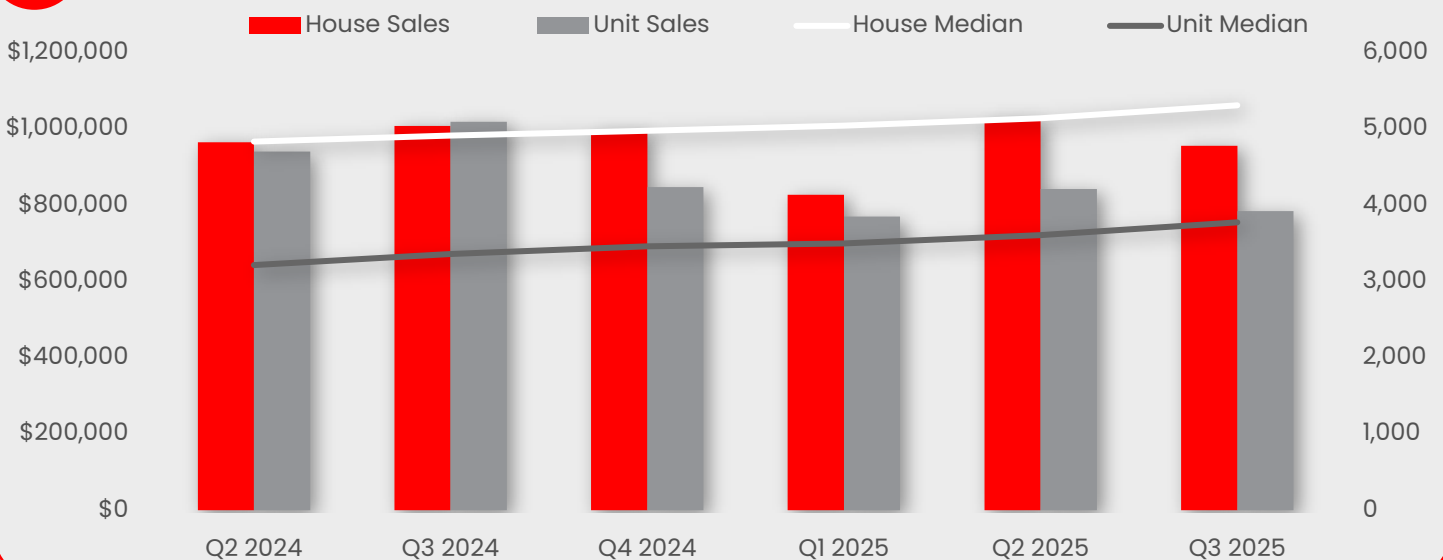


Average vendor discounts remained at a premium in the past 12 months to Q3 2025; however, at a **higher rate of 1.2% for houses and 2.8% for units**. This marks a **peak premium for both property types**. The **Brisbane Metro market** continues to **favour sellers**, with buyers increasingly offering above the first listed prices. Now is an ideal time for owners to sell and maximise their returns.

Most of the homes sold in Brisbane Metro in 2025# were in the **premium price point of \$1,200,000 and above (53.0%) for houses and \$900,000 and above (24.5%) for units**. This is beneficial for homeowners looking to capitalise on their investments. **The most affordable price brackets are still available, with 17.7% of houses sold for less than \$899,999 and 20.9% of units sold for less than \$599,999**, in good news for first home buyers. The Brisbane Metro market does provide opportunities across all price ranges, however, with the more affordable price points shrinking (in %), buyers must act fast.



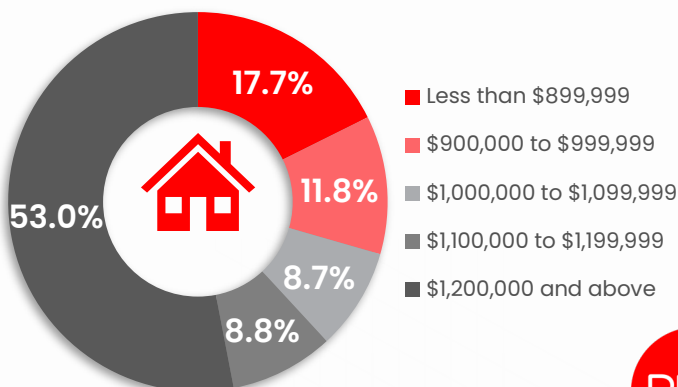
## MARKET PERFORMANCE



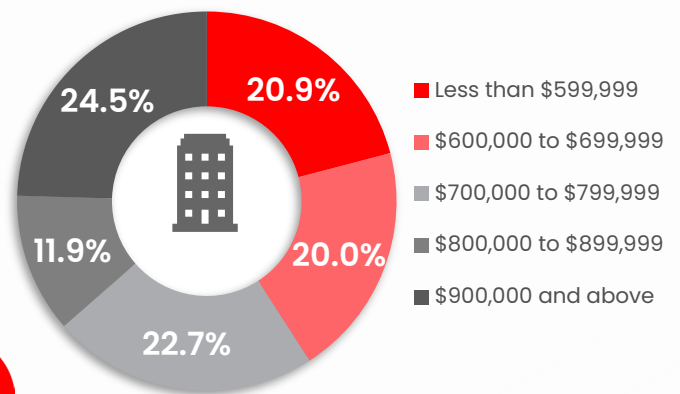
\$

## PRICE BREAKDOWN 2025#

### HOUSES SOLD



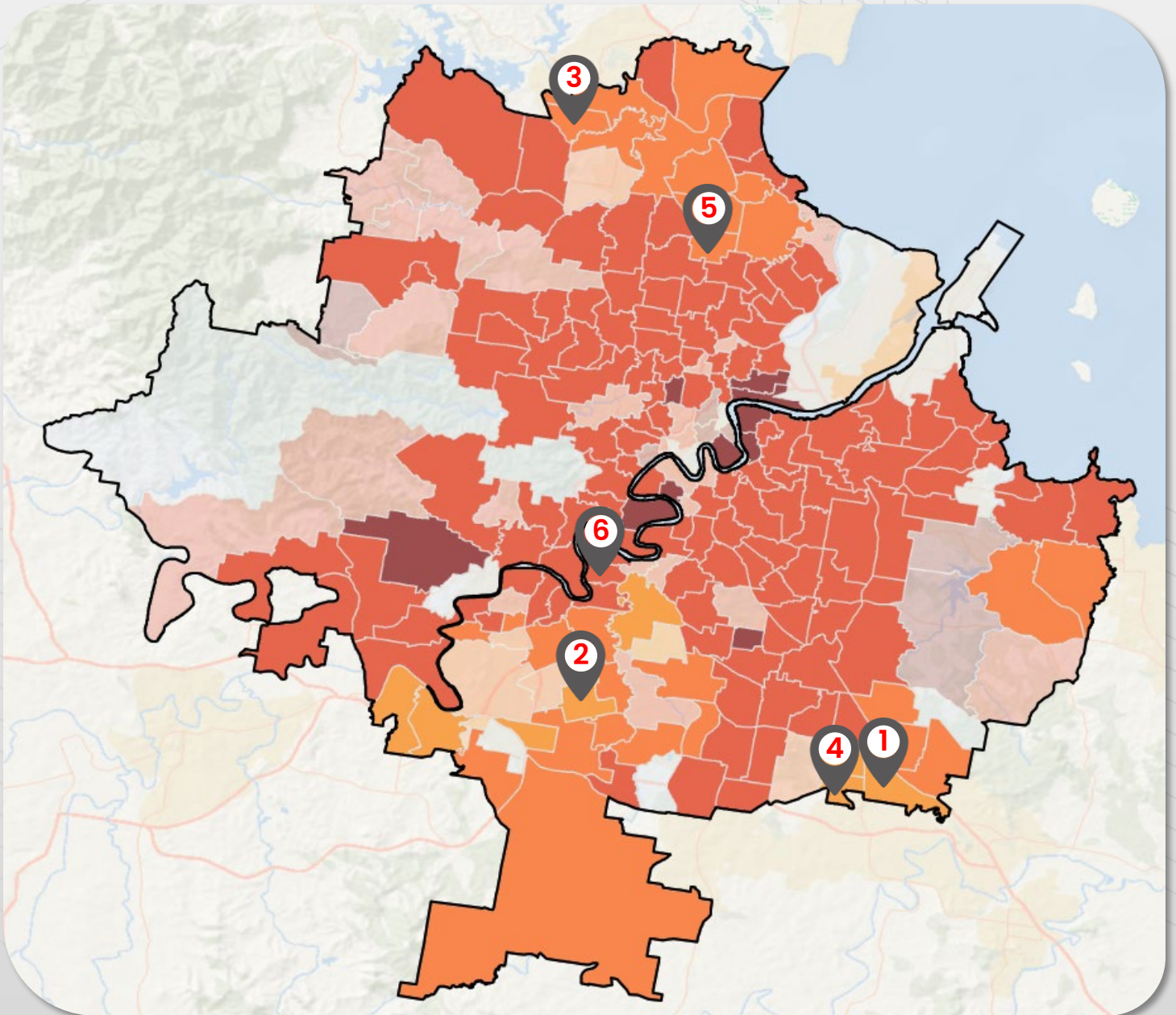
### UNITS SOLD



PRD.



# BRISBANE METRO MEDIAN HOUSE PRICES 2025\* 20KM FROM CBD



## LEGEND

	Data not available
	\$0 - \$500,000
	\$500,000 - \$800,000
	\$800,000 - \$1,000,000
	\$1,000,000 - \$2,000,000
	\$2,000,000+
	20km from CBD
	Translucent colours for <20 sales

## BRISBANE SMART MOVE SUBURBS RENTAL YIELD



	Suburb	House
1	Slacks Creek	2.9%
2	Inala	3.3%
3	Bray Park	3.8%



	Suburb	Unit
4	Logan Central	5.0%
5	Zillmere	4.8%
6	Sherwood	3.3%

\*House median price reflected in the heat-map captures sale transactions from 1<sup>st</sup> January 2025 to 30<sup>th</sup> September 2025.  
Source: APM Pricerfinder, ESRI ArcGIS, SQM Research. © PRD 2025.

# RENTAL GROWTH 2025 €

**House rental yield in Brisbane Metro** was **3.1%** as of September 2025, outperforming Sydney Metro (2.7%) and on par with Melbourne Metro (3.1%). This performance was paired with **a 1.5% increase in median house rental price** in the past 12 months to Q3 2025, **at \$700 per week**, along with **a 43.4% surge in the number of houses rented (to 6,701 rentals)**. A similar trend can be seen in the unit market, which reflects high demand and competitiveness across both property types. This phenomenon **creates a favourable environment for investors to re-enter the market**, especially with a lower entry price than Sydney Metro.

**2-bedroom houses and 2-bedroom units** have provided investors with the **highest annual rental growth of +0.9% and +9.2%, to achieve \$575 and \$650 per week**, respectively. All rental property types have increased in median rental prices.

In September 2025, **Brisbane Metro** recorded **a low vacancy rate of 1.0%**, below Sydney Metro (1.3%) and Melbourne Metro (1.8%). Despite minor fluctuations over the past 6 months, Brisbane Metro's rental market **has remained resilient, consistently recording vacancy rates well below the Real Estate Institute of Australia's healthy benchmark of 3.0%, signalling quicker occupancy of rental properties**. This suggests a conducive and sustainable environment for investors, even if the median house sales price (thus, entry price) has increased in the past 12 months to Q3 2025.



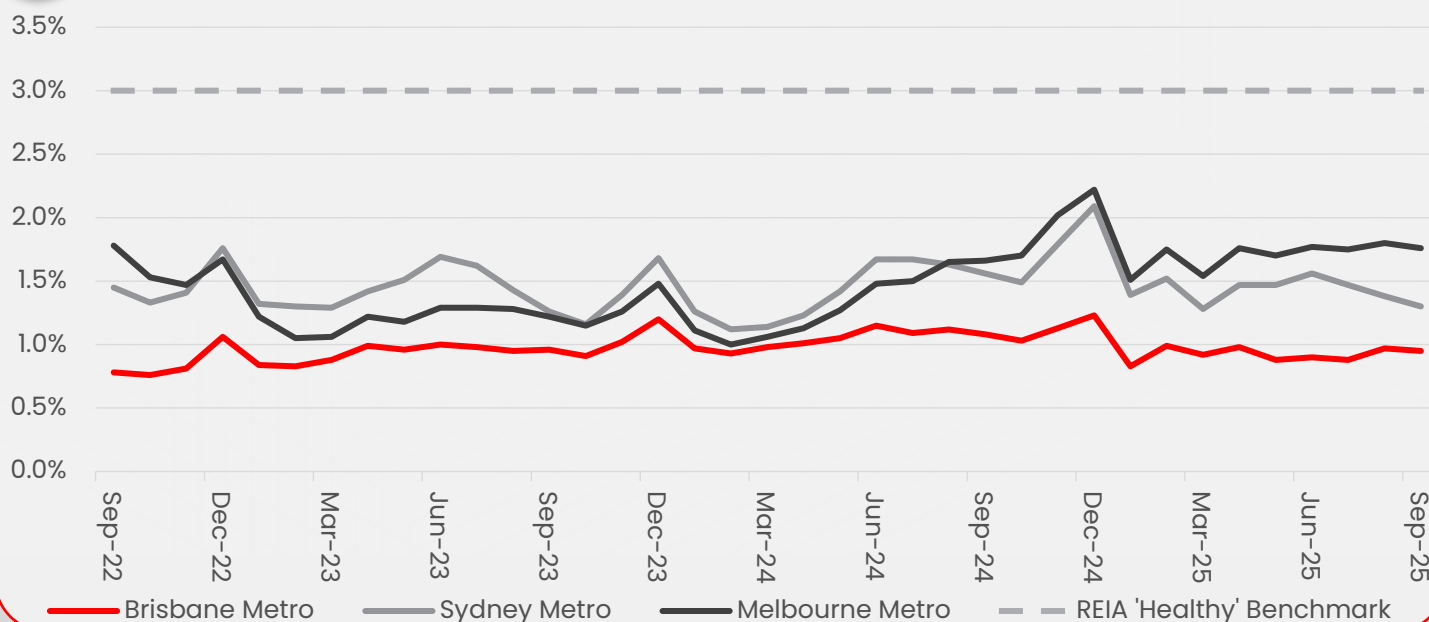
2 BEDROOMS	3 BEDROOMS	4+ BEDROOMS
+0.9%	+0.0%	+1.3%
\$575	\$650	\$760



1 BEDROOM	2 BEDROOMS	3+ BEDROOMS
+8.3%	+9.2%	+6.1%
\$500	\$650	\$700



## RENTAL VACANCY RATES 2025



## RENTAL YIELD 2025§

BRISBANE  
METRO



HOUSES

**3.1%**



UNITS

**4.1%**

MELBOURNE  
METRO



HOUSES

**3.1%**



UNITS

**4.6%**

SYDNEY  
METRO



HOUSES

**2.7%**



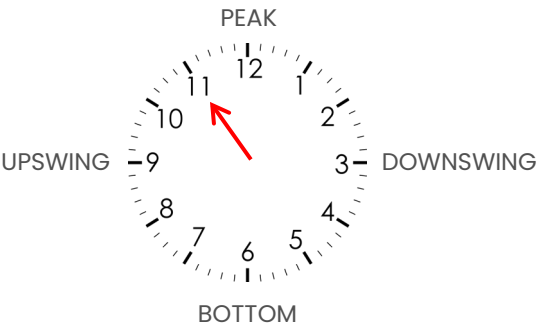
UNITS

**4.3%**

PRD.



# HOUSES PROPERTY CLOCK



## SMART MOVES SUBURBS FOR HOUSES

### Slacks Creek

4127

Located approximately **19.2km** from the Brisbane CBD.

- 2 Bed
- 3 Bed
- 4+ Bed

Median House Price

\$760,000

2 Bed Median Price

-

3 Bed Median Price

\$750,000

4+ Bed Median Price

\$815,000

Annual Median Price Growth	5.0%**
Vacancy Rate (Sep-25)	0.7%
Rental Yield (Sep-25)	2.9%
Key Amenity (5km)	Logan Central Plaza
Total Projects (\$)	\$18.2M^
Residential Ready-to-sell Planned 2025	22 Townhouses 0 Dwellings 0 Units
Unemployment Rate	8.1%

### Inala

4077

Located approximately **14.7km** from the Brisbane CBD.

- 2 Bed
- 3 Bed
- 4+ Bed

Median House Price

\$800,000

2 Bed Median Price

\$800,000

3 Bed Median Price

\$805,000

4+ Bed Median Price

\$875,000

Annual Median Price Growth	14.3%**
Vacancy Rate (Sep-25)	0.4%
Rental Yield (Sep-25)	3.3%
Key Amenity (5km)	Inala Plaza
Total Projects (\$)	\$9.0M^
Residential Ready-to-sell Planned 2025	15 Townhouses 0 Dwellings 0 Units
Unemployment Rate	10.6%

### Bray Park

4500

Located approximately **19.4km** from the Brisbane CBD.

- 2 Bed
- 3 Bed
- 4+ Bed

Median House Price

\$850,000

2 Bed Median Price

\$715,000

3 Bed Median Price

\$835,000

4+ Bed Median Price

\$890,000

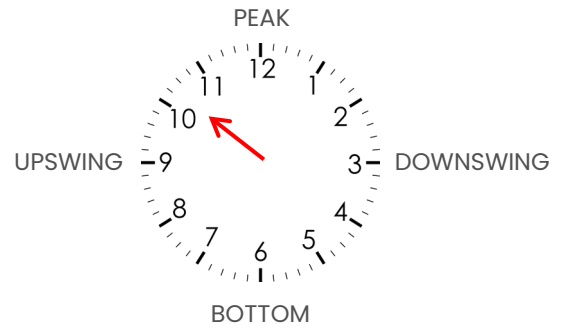
Annual Median Price Growth	9.0%**
Vacancy Rate (Sep-25)	0.3%
Rental Yield (Sep-25)	3.8%
Key Amenity (5km)	Kensington Village
Total Projects (\$)	\$9.9M^
Residential Ready-to-sell Planned 2025	25 Townhouses 0 Dwellings 0 Units
Unemployment Rate	8.8%

^Quoted estimated values of projects are based on reported land/construction values as stated by the relevant data authority and do not signify their commercial/resale value.  
\*\*Median price growth quoted captures sale transactions between Q3 2024 – Q3 2025, or 01/07/2024-30/09/2024 vs 01/07/2025-30/09/2025.  
Source: APM Pricfinder, SQM Research, Cordell Connect, Department of Small Jobs and Business, Google Maps. © PRD 2025.





## UNITS PROPERTY CLOCK

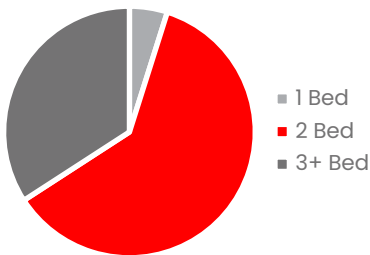


## SMART MOVES SUBURBS FOR UNITS



### Logan Central 4114

Located approximately **19.9km**  
from the Brisbane CBD.



Median Unit Price	<b>\$425,000</b>
1 Bed Median Price	<b>\$365,000</b>
2 Bed Median Price	<b>\$425,000</b>
3+ Bed Median Price	<b>\$405,000</b>

Annual Median Price Growth	21.4%**
----------------------------	---------

Vacancy Rate (Sep-25)	0.5%
-----------------------	------

Rental Yield (Sep-25)	5.0%
-----------------------	------

Key Amenities (5km)	Logan Central Plaza
---------------------	---------------------

Total Projects (\$)	\$11.6M <sup>^</sup>
---------------------	----------------------

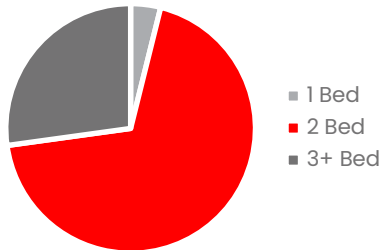
Residential Ready-to-sell Planned 2025	0 Townhouses 0 Dwellings 21 Units
--	---

Unemployment Rate	17.7%
-------------------	-------



### Zillmere 4034

Located approximately **12.2km**  
from the Brisbane CBD.



Median Unit Price	<b>\$640,000</b>
1 Bed Median Price	<b>\$425,000</b>
2 Bed Median Price	<b>\$625,000</b>
3+ Bed Median Price	<b>\$736,250</b>

Annual Median Price Growth	14.2%**
----------------------------	---------

Vacancy Rate (Sep-25)	0.9%
-----------------------	------

Rental Yield (Sep-25)	4.8%
-----------------------	------

Key Amenity (5km)	Taigum Square
-------------------	---------------

Total Projects (\$)	\$17.2M <sup>^</sup>
---------------------	----------------------

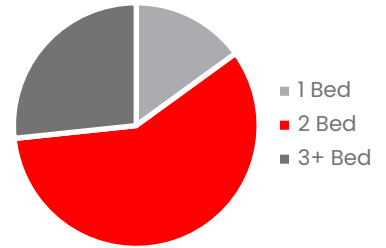
Residential Ready-to-sell Planned 2025	0 Townhouses 0 Dwellings 10 Units
--	---

Unemployment Rate	7.8%
-------------------	------



### Sherwood 4075

Located approximately **8.2km**  
from the Brisbane CBD.



Median Unit Price	<b>\$680,000</b>
1 Bed Median Price	<b>\$582,000</b>
2 Bed Median Price	<b>\$678,500</b>
3+ Bed Median Price	<b>\$877,500</b>

Annual Median Price Growth	7.9%**
----------------------------	--------

Vacancy Rate (Sep-25)	1.0%
-----------------------	------

Rental Yield (Sep-25)	3.3%
-----------------------	------

Key Amenity (5km)	Sherwood Central
-------------------	------------------

Total Projects (\$)	\$15.0M <sup>^</sup>
---------------------	----------------------

Residential Ready-to-sell Planned 2025	32 Townhouses 0 Dwellings 0 Units
--	---

Unemployment Rate	3.4%
-------------------	------

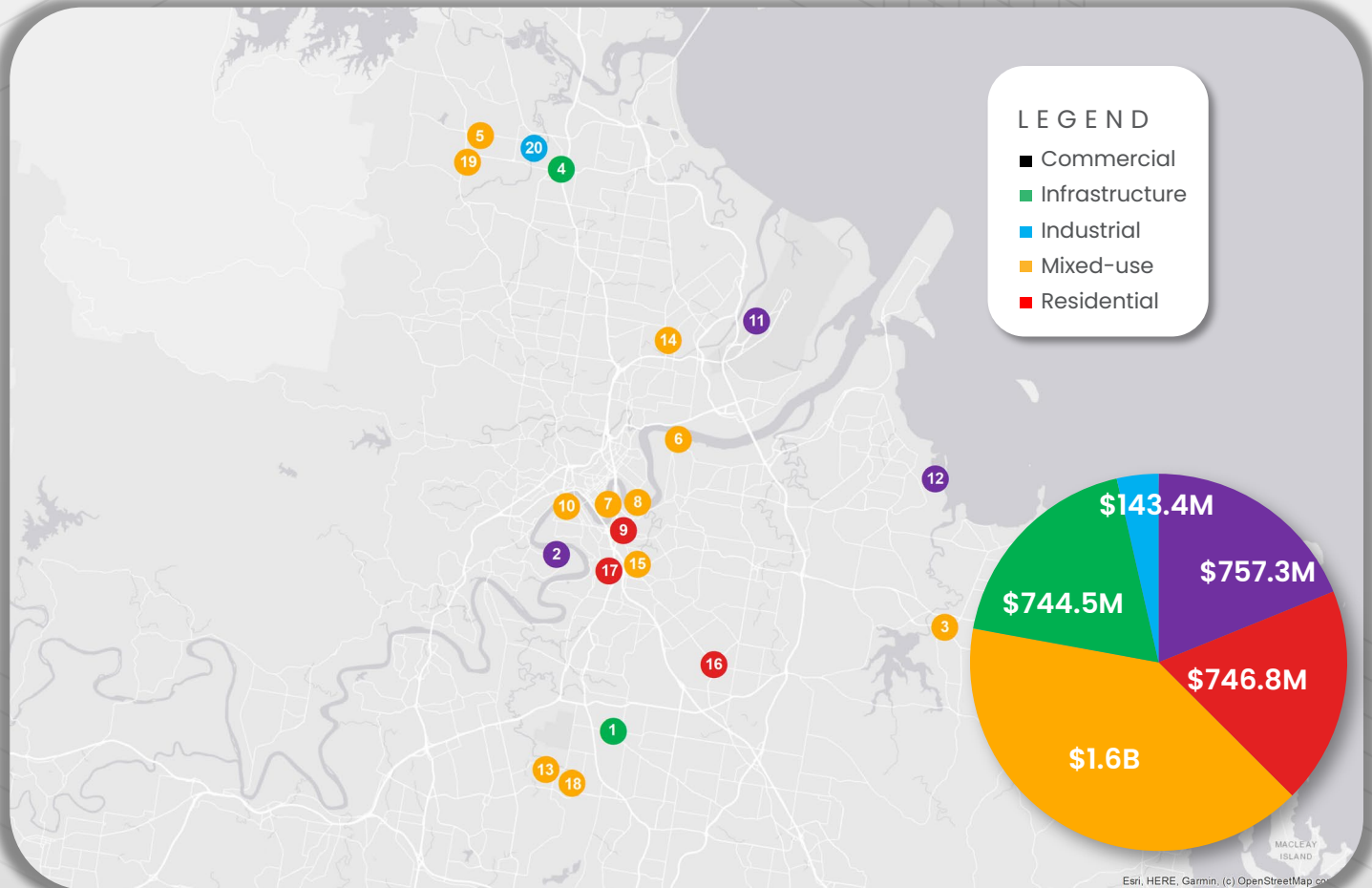
<sup>^</sup>Quoted estimated values of projects are based on reported land/construction values as stated by the relevant data authority and do not signify their commercial/resale value.

\*\*Median price growth quoted captures sale transactions between Q3 2024 – Q3 2025, or 01/07/2024–30/09/2024 vs 01/07/2025–30/09/2025.

Source: APM Pricerfinder, SQM Research, Cordell Connect, Department of Small Jobs and Business, Google Maps. © PRD 2025.



# PROJECT DEVELOPMENT MAP 2025\*



Location	Project <sup>£</sup>	Type	Estimated Value <sup>µ</sup>	Suburb
1	Boundary Road (Coopers Plains) Rail Level Crossing (State Government)	Infrastructure	\$399,000,000	Coopers Plains
2	University Of Queensland Student Accommodation	Commercial	\$285,000,000	St Lucia
3	Capalaba Town Centre Revitalisation Project (Various Tenants)	Mixed-Use	\$250,000,000	Capalaba
4	Bruce Highway Linkfield Road Overpass (State Government)	Infrastructure	\$175,000,000	Carseldine
5	Data Centre Campus Brendale (Various Tenants)	Mixed-Use	\$107,000,000	Brendale
6	Bulimba Barracks Redevelopment (Residential - 855 Homes + Commercial)	Mixed-Use	\$90,000,000	Bulimba
7	26 Cairns Street Mixed Use Development (Residential - 232 Apartments + Commercial)	Mixed-Use	\$90,000,000	Kangaroo Point
8	The Bedford Mixed Use Development (Residential - 128 Apartments + Commercial)	Mixed-Use	\$80,000,000	Kangaroo Point
9	77-85 Linton & Vulture Streets Units (126 Units)	Residential	\$80,000,000	Kangaroo Point
10	15-19 Brereton Street Mixed Use Development (Residential - 324 Apartments + Commercial)	Mixed-Use	\$80,000,000	South Brisbane
11	Queensland Regional Aeromedical Base	Commercial	\$72,000,000	Brisbane Airport
12	The Village Retirement Village Manly Stages 1-4	Commercial	\$60,000,000	Lota
13	182-202 Bowhill Road Warehouses (Industrial + Commercial - Office)	Mixed-Use	\$60,000,000	Willawong
14	Danby Lane Nundah Mixed Use Development (Residential - 84 Apartments + Commercial)	Mixed-Use	\$57,000,000	Nundah
15	14 & 20 Stoneham & Montague Streets & Old Cleveland Road Mixed Use (Residential - 82 Apartments + Commercial)	Mixed-Use	\$55,000,000	Greenslopes
16	Salina Towers Apartments Mount Gravatt East (70 Apartments)	Residential	\$50,000,000	Mount Gravatt East
17	30-36 Wolseley & Carl Streets Apartments Stage 2 (126 Apartments)	Residential	\$50,000,000	Woolloongabba
18	182-202 Bowhill Road Warehouses (Industrial + Commercial - Office)	Mixed-Use	\$50,000,000	Willawong
19	Brendale Retail Centre (Various Tenants)	Mixed-Use	\$40,000,000	Brendale
20	31 Johnstone Road Warehouses	Industrial	\$40,000,000	Brendale

Project development map showcases a sample of upcoming projects only, due to accuracy of addresses provided by the data provider for geocoding purposes. £ Top Projects are based on suburbs located within a 20km radial distance of the Brisbane CBD. µ Estimated value is the value of construction costs provided by relevant data authority it does not reflect the project's sale/commercial value. Source: Cordell Connect database, ESRI ArcGIS. © PRD 2025.

# BRISBANE METRO TOP SMART MOVE SUBURBS 2025

To widen the opportunities for prospective buyers, the below tables provide further alternatives to the top ten suburbs (note: the table below presents seven more suburbs, adding to the 3 houses and 3 unit suburbs explored in the previous sections of the report). **The same methodology was applied to select the suburbs below.** These suburbs were not chosen as key suburbs due to not being able to fulfill one or more of the criteria set **but provide an alternative to Brisbane Metro median house/unit prices.**

## HOUSES

Suburbs	Median House Price 2025	1yr Price Growth	10yrs Price Growth	House Sales 2025	1yr Sales Growth	Price % to Metro	House Rental Yield	Vacancy Rates	Total \$\$ 2025 Project*	Total Stand-alone New Stock	Total New Land Lots
<b>Acacia Ridge</b>	\$847,000	9.6%	132.4%	75	-44.9%	-20.3%	3.9%	1.4%	\$31.3M	4	-
<b>Griffin</b>	\$880,000	7.3%	101.6%	123	-48.8%	-17.1%	3.9%	0.7%	\$27.9M	-	45
<b>Greenbank</b>	\$900,000	4.7%	69.8%	251	-14.9%	-15.3%	4.2%	1.4%	\$3.0M	7	-
<b>Zillmere</b>	\$925,000	8.8%	107.9%	106	-6.2%	-12.9%	3.5%	0.9%	\$17.2M	10	-
<b>Pallara</b>	\$958,500	1.4%	-35.2%	98	-31.0%	-9.8%	3.9%	1.4%	\$5.4M	-	117
<b>Taigum</b>	\$960,000	3.2%	97.2%	37	-46.4%	-9.6%	3.2%	0.4%	\$34.4M	50	63
<b>Capalaba</b>	\$968,200	10.8%	117.5%	151	-39.6%	-8.8%	3.0%	0.4%	\$279.6M	8	-

## UNITS

Suburbs	Median Unit Price 2025	1yr Price Growth	10yrs Price Growth	Unit Sales 2025	1yr Sales Growth	Price % to Metro	Unit Rental Yield	Vacancy Rates	Total \$\$ 2025 Project*	Total Stand-alone New Stock	Total New Land Lots
<b>Slacks Creek</b>	\$521,444	14.6%	134.6%	48	-48.4%	-30.9%	4.6%	0.7%	\$18.2M	22	-
<b>Taigum</b>	\$675,000	8.9%	95.1%	84	-30.6%	-10.6%	4.7%	0.4%	\$34.4M	50	63
<b>Chermside</b>	\$686,500	9.8%	49.9%	252	-33.5%	-9.1%	4.7%	0.5%	\$52.2M	68	-
<b>Nundah</b>	\$700,000	15.4%	59.1%	278	-44.6%	-7.3%	5.0%	0.7%	\$58.8M	84	-
<b>Upper Mount Gravatt</b>	\$712,500	14.9%	55.6%	108	-37.6%	-5.6%	5.0%	1.0%	\$21.8M	58	-
<b>Coopers Plains</b>	\$722,500	4.7%	80.6%	40	2.6%	-4.3%	3.0%	2.2%	\$422.1M	57	-
<b>Woolloongabba</b>	\$726,000	11.7%	37.1%	147	-44.9%	-3.9%	4.9%	1.0%	\$68.8M	126	-

\*Disclaimer: Estimated value is the value of construction costs as per provided by the relevant data authority, it does not reflect the project's sale/commercial value. It is current as of September 2025.

Source: APM Pricefinder, SQM Research, Cordell Database, Australian Bureau of Statistics, Australian Government Department of Jobs and Small Business. © PRD 2025.



# ABOUT PRD'S RESEARCH DIVISION

PRD's property research division provides reliable and unbiased data, insights and consultancy to clients in both metropolitan and regional locations across Australia.

Our extensive research capabilities and specialised approach ensure our clients can make the most informed and financially sound decisions about residential and commercial properties.

## KNOWLEDGE

Access to accurate and objective research is the foundation of all good property decisions. PRD shares on-the-ground experience and decades of knowledge to deliver innovative and effective solutions to our clients.

We take a holistic approach and focus on understanding new issues impacting the property industry, such as the environment and sustainability, the economy, demographic and psychographic shifts, and commercial and residential design, and forecast future implications around such issues based on historical data and facts.

## PEOPLE

Our in-house research team is skilled in deriving macro and micro quantitative information from multiple credible sources, so we can ensure we provide strategic advice and financially sound direction regarding property and market performance.

## RESEARCH SERVICES

Our research services span over every suburb, local government area, and state within Australia. We have the ability and systems to monitor market movements, demographic changes and property trends. We use our knowledge of market sizes, price structure and buyer profiles to identify opportunities for clients and provide market knowledge that is unbiased, thorough and reliable.

### Our services include:

- Advisory & consultancy
- Market analysis including profiling & trends
- Primary qualitative & quantitative research
- Demographic & target market analysis
- Geographic information mapping
- Project analysis including product & pricing recommendations
- Rental & investment return analysis

# PRD.

## GET IN TOUCH

**PRD Research Division**



+61 7 3229 3344



[research@prd.com.au](mailto:research@prd.com.au)



PRD.  REAL ESTATE

