

Burleigh Heads Market Update

1st Half 2026



OVERVIEW

In Q4 2025, Burleigh Heads* had a median house price of \$1,790,000 and a median unit price of \$1,200,000. This represents annual (Q4 2024 - Q4 2025) price growth of 13.8% for houses and 17.1% for units. Comparing Q4 2024 and Q4 2025, total sales decreased by -15.3% (to 177 sales in Q4 2025) for houses and by -9.8% (to 296 sales in Q4 2025) for units. This highlights a clear undersupply for both property types, which along with lower interest rates have stimulated price growth. Units saw higher price growth than houses, due to its more affordable price and less house stock available. As a result, many house buyers have turned to units.

CHANGE FROM LAST YEAR HALF YEAR



HOUSE SALES	↓	↓
HOUSE MEDIAN PRICE	↑	↑
HOUSE RENTAL PRICE	↑	↓



UNIT SALES	↓	↓
UNIT MEDIAN PRICE	↑	↑
UNIT RENTAL PRICE	↑	↑



MARKET CONDITIONS

MEDIAN PRICE
Q4 2025

\$1.8M

SALES

\$1.2M

AVERAGE DAYS
ON MARKET Q4 2025

42
HOUSE

52
UNIT

MEDIAN PRICE
Q4 2025

\$1,185

RENTALS

\$850

AVERAGE DAYS
ON MARKET Q4 2025

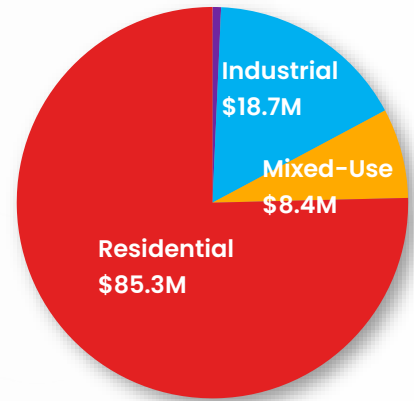
20
HOUSE

19
UNIT



FUTURE DEVELOPMENTS

Burleigh Heads[£] will see approximately **\$113.2M of new projects commencing construction in 2026.**



A main industrial project planned in 2026 is Pacific Highway Warehouse Units & Self Storage Units, which will construct 9 conventional warehouse units (2404.8sq m combined GFA) & 12 self storage units (1802.8sq m combined GFA) over 3 building pods.

Key residential projects include:

- 1929 Gold Coast Highway Apartments (56 Apartments)
- 166 The Esplanade (28 Units)
- 17 Tallebudgera Creek Road Townhouses (9 Townhouses)
- 15 George Street (5 Villas)

Although there are many residential and mixed-use projects planned for 2026; it will deliver units/apartments. Further, compared to Q4 2025 sales (177 houses and 296 units) this is not enough. Without any new houses in the pipeline the undersupply remains. New development also takes time to build. Thus, in the short-term higher property prices are very likely.

123 Units/
Apartments

21
Townhouses



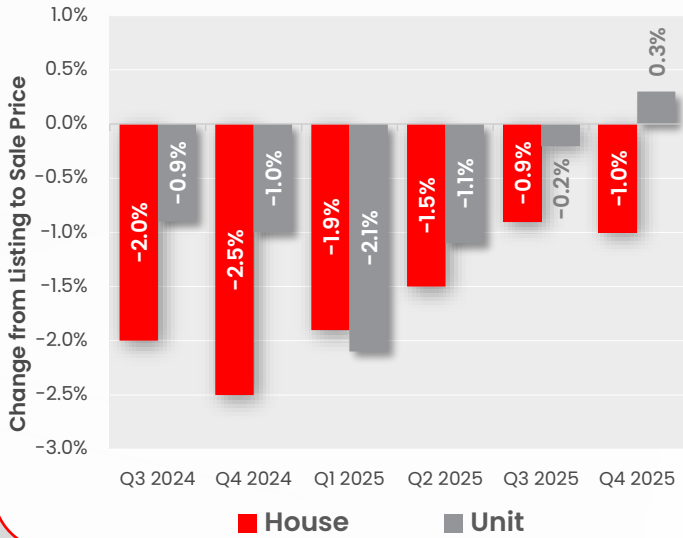
AVERAGE VENDOR DISCOUNT*

Average vendor discount reflects the average percentage difference between the first list price and final sold price. A lower percentage difference (closer to 0.0%) suggests that buyers are willing to purchase close to the first asking price of a property.

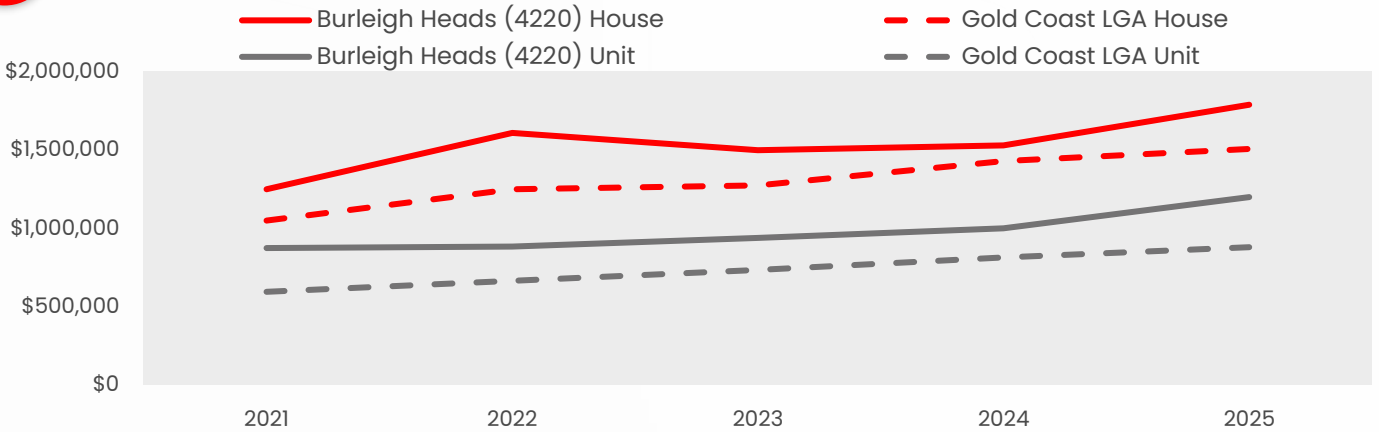
Average vendor discounts between Q4 2024 and Q4 2025 have tightened to -1.0% for houses, while it swung to a premium of 0.3% for units. The Burleigh Heads* house market still benefit buyers, with owners accepting a slight discount to the first list price. That said, with a tighter discount it is shifting towards a seller's market. without any new houses planned in 2026, buyers need to act fast.

The suburb of Burleigh Heads has outperformed the wider Gold Coast Local Government Area (LGA) in house and unit median prices for the past 5 years. This continued to be the case in 2025, for both property types. The suburb of Burleigh Heads remain a premium suburb, especially with a faster price growth rate compared to Gold Coast LGA.

Most the homes sold in Burleigh Heads* across 2025 were in the most affordable price brackets below \$1,649,999 for houses (47.4%) and below \$1,049,999 for units (45.7%). This benefits buyers. The premium price point is strong, with 31.5% of houses sold above \$1,950,000. This is good news for owners. Interestingly only 5.9% of units were sold in the premium price point of above \$1,350,000. Thus, buyers must act fast, before the price trend shifts up even higher.



MARKET COMPARISON

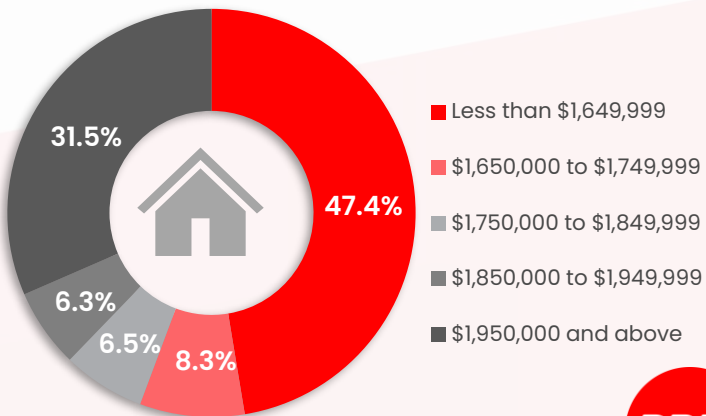


The market comparison graph provides a comparative trend for median price of houses and units over the past 5 years. The main LGA chosen was based on their proximity to the main suburb analysed, which is Burleigh Heads.

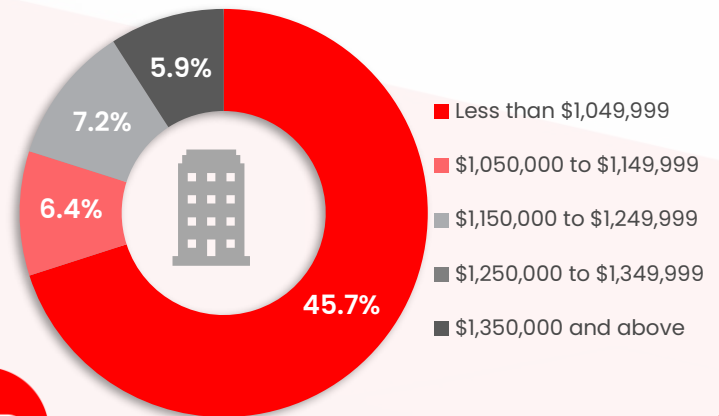


PRICE BREAKDOWN 2025

HOUSES SOLD



UNITS SOLD





RENTAL GROWTH 2025€


House rental yield in Burleigh Heads[‡] was 3.0% as of December 2025, below Gold Coast Main (3.5%) but higher than Brisbane Metro (2.9%). This is paired with a 3.0% growth in the median house rental price in the past 12 months to Q4 2025, to \$1,185 per week; and a -9.5% decrease in the number of houses rented (to 95 houses in Q4 2025). This indicates an undersupplied and competitive house rental market in Burleigh Heads[‡], which is beneficial to investors.

3-bedroom houses have provided investors with +14.6% rental growth annually, achieving a median rent of \$1,100 per week.

Burleigh Heads[‡] recorded a vacancy rate of 1.9% in December 2025, higher than the Gold Coast Main average of 1.3% and Brisbane Metro's 1.2%. Vacancy rates have increased in the past 12 months, due to investors re-entering the market. However, a 1.9% vacancy rate is still below the Real Estate Institute of Australia's healthy benchmark of 3.0%, indicating quicker occupancy of rental homes in Burleigh Heads[‡]. This creates a conducive and sustainable environment for investors, even if property prices (thus entry prices) have increased in the past 12 months.

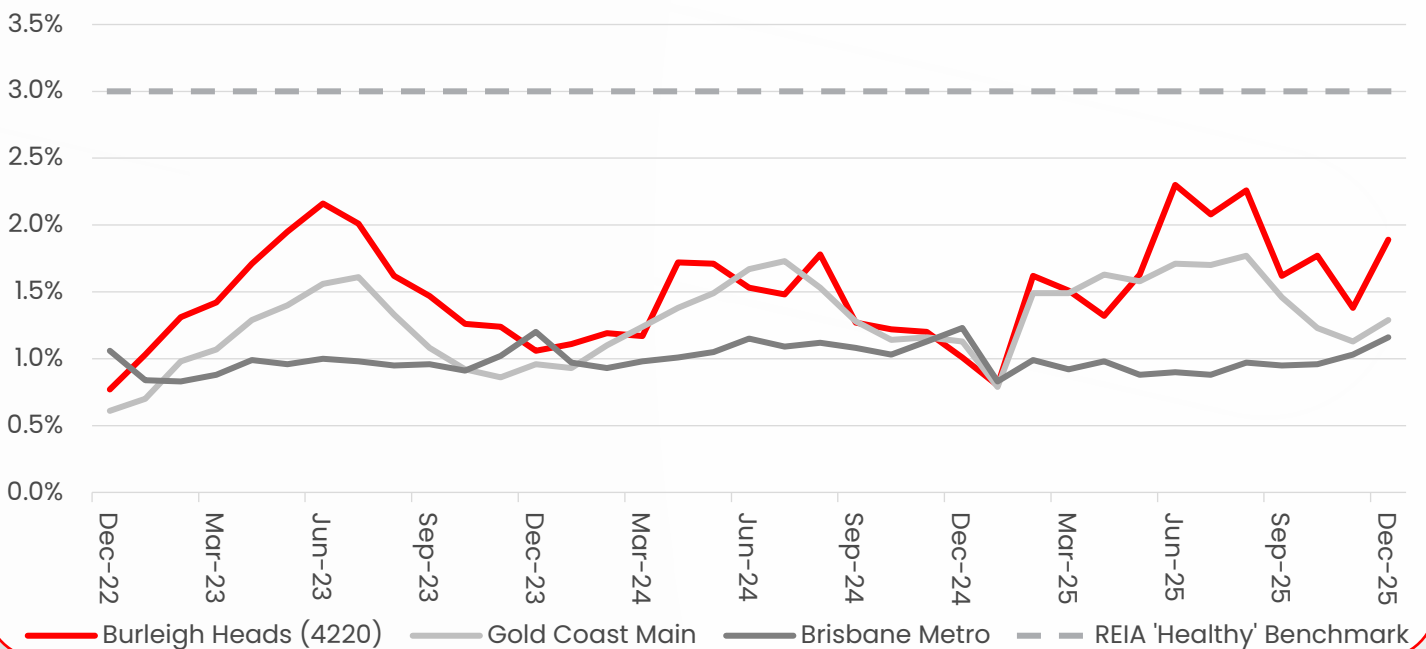
 2 BEDROOMS
+13.3%

 3 BEDROOMS
+14.6%

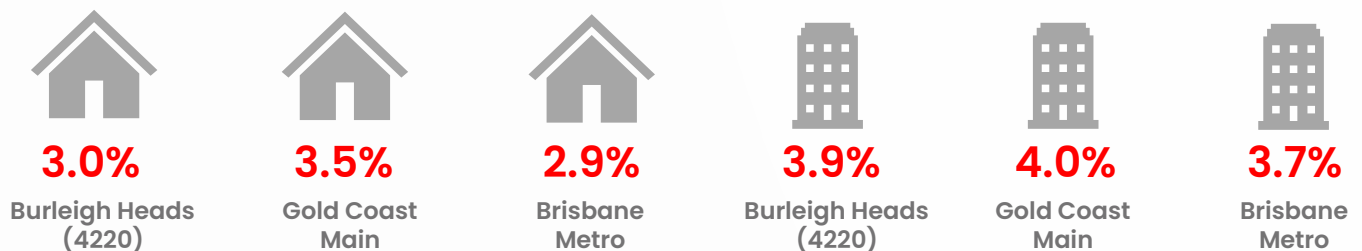
 4 BEDROOMS
+9.0%



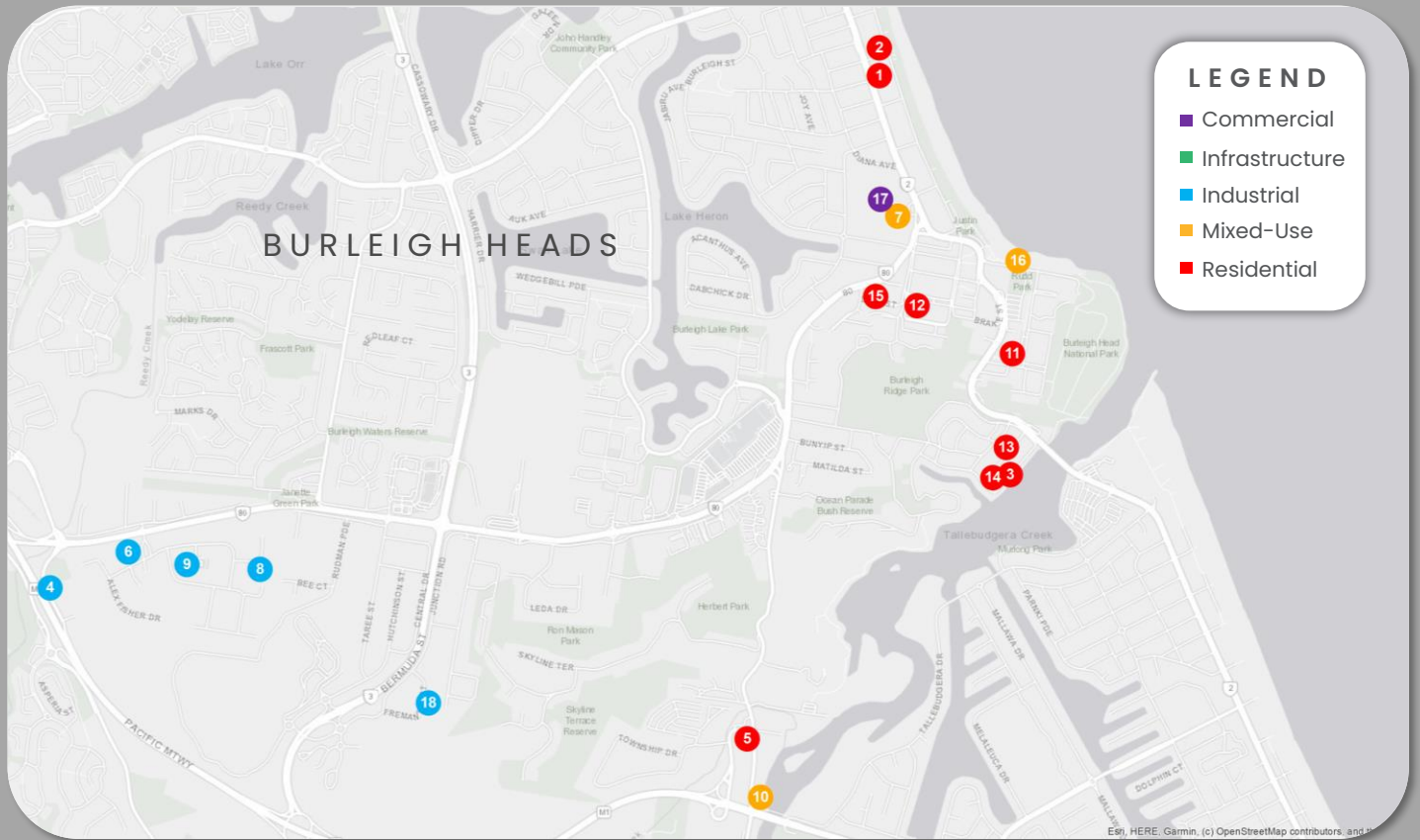
RENTAL VACANCY RATES 2025



RENTAL YIELD 2025§



PROJECT DEVELOPMENT MAP 2026 ^A



#	Project [£]	Type	Estimated Value ^µ	Commence Date ^ψ
1	1929 Gold Coast Highway Apartments (56 Apartments)	Residential	\$50,000,000	1/05/2026
2	166 The Esplanade Units (28 Units)	Residential	\$15,000,000	15/07/2026
3	25-27 Awoonga Avenue Units (8 Units)	Residential	\$7,000,000	15/09/2026
4	Pacific Highway Warehouse Units & Self Storage Units	Industrial	\$6,500,000	26/11/2026
5	17 Tallebudgera Creek Road Townhouses (9 Townhouses)	Residential	\$6,000,000	3/06/2026
6	6 Ern Harley Drive Warehouse Units	Industrial	\$6,000,000	4/06/2026
7	1 & 2 West Street Mixed Use Development (Various Tenants)	Mixed-Use	\$5,000,000	14/12/2026
8	13 Calabro Way Self Storage Units & Warehouse Units	Industrial	\$3,000,000	21/08/2026
9	Loxon Storage Burleigh Heads Self Storage Facility Extension	Industrial	\$2,500,000	29/07/2026
10	36 Tallebudgera Creek Road Mixed Use Development (Various Tenants)	Mixed-Use	\$2,400,000	24/07/2026
11	15 George Street East Villas (5 Villas)	Residential	\$2,000,000	27/10/2026
12	46 Ewart Street Villas (4 Villas)	Residential	\$1,500,000	10/04/2026
13	9 Bullimah Avenue Units (4 Villas)	Residential	\$1,500,000	1/12/2026
14	30 Bullimah Avenue Apartments (4 Apartments)	Residential	\$1,200,000	30/06/2026
15	17 East Street Units (3 Units)	Residential	\$1,100,000	29/05/2026
16	Burleigh Heads Beach Pavilion Mixed Used Development (Various Tenants)	Mixed-Use	\$1,000,000	29/07/2026
17	Burleigh Heads State School Demolition Works	Commercial	\$800,000	16/02/2026
18	MRT Burleigh Heads Warehouse Extension	Industrial	\$650,000	2/10/2026

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- Geographic information mapping
- Project analysis including product and pricing recommendations
- Rental and investment return analysis

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REFERENCES

* Burleigh Heads sales market data and key indicators encapsulates aggregate property market conditions within the postcodes of 4220 and 4221.

** Estimated values are based on construction value provided by the relevant data authority and does not reflect commercial and/or re-sale value.

2025 encapsulates sales transactions for the full year 2025 (01/01/2025 – 31/12/2025).

€ Annual rental growth is a comparison between Q4 2024 (01/10/2024 – 31/12/2024) and Q4 2025 (01/10/2025 – 31/12/2025) house median rent figures.

¥ Burleigh Heads rental market data encapsulates aggregate property conditions within the postcode of 4220.

§ Rental yields shown are as reported as of December 2025.

▲ Project development map showcases a sample of upcoming projects only, due to accuracy of addresses provided by the data provider for geocoding purposes.

£ Projects refers to the top developments within the suburb of Burleigh Heads.

μ Estimated value is the value of construction costs provided by relevant data authority, it does not reflect the project's sale/commercial value.

ψ Commencement date quoted for each project is an approximate only, as provided by the relevant data authority, PRD does not hold any liability to the exact date.

Source: APM Pricerfinder, Cordell Connect database, SQM Research, Esri ArcGIS.

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