

# Office Market Outlook – July 2010



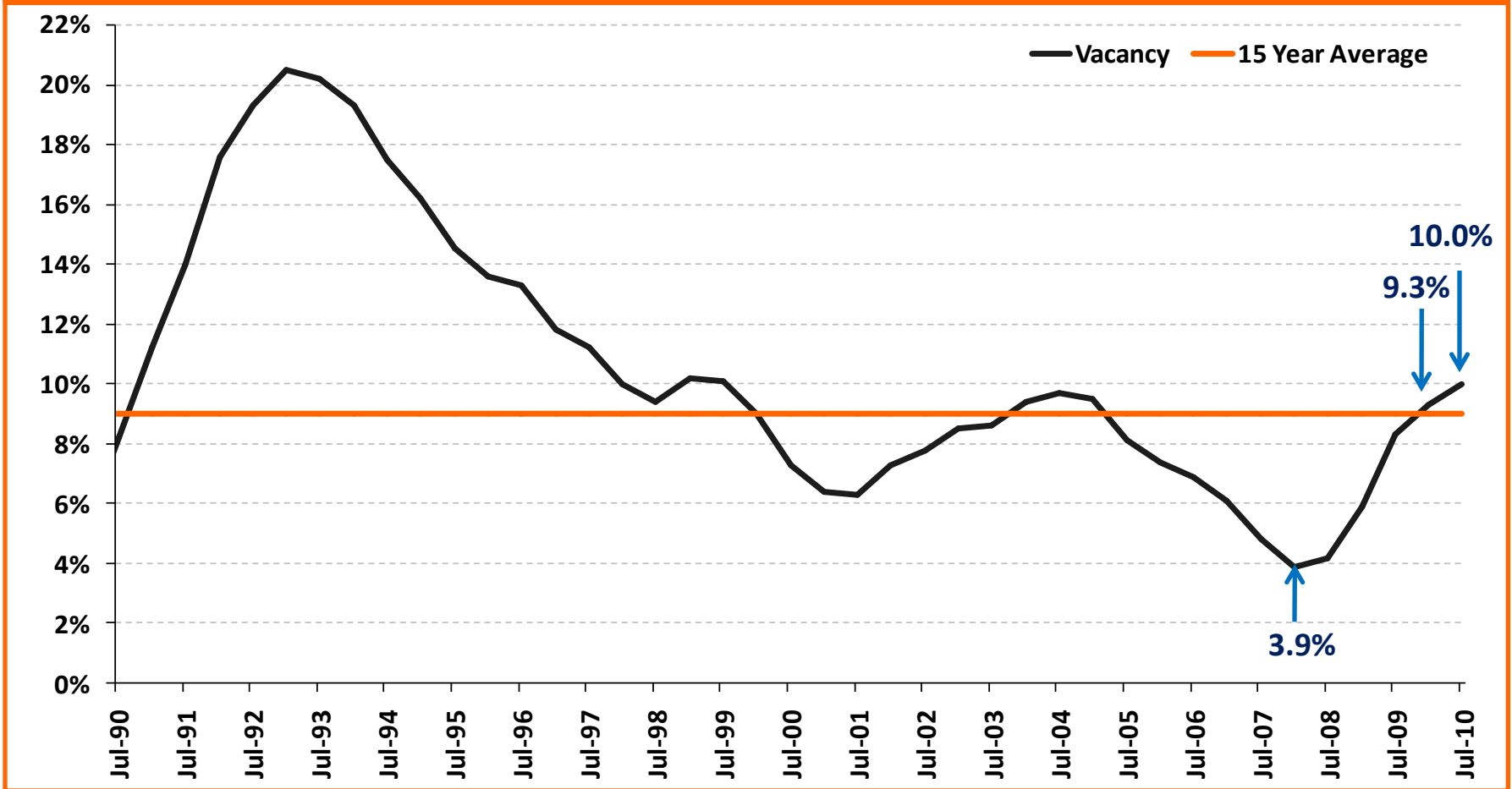
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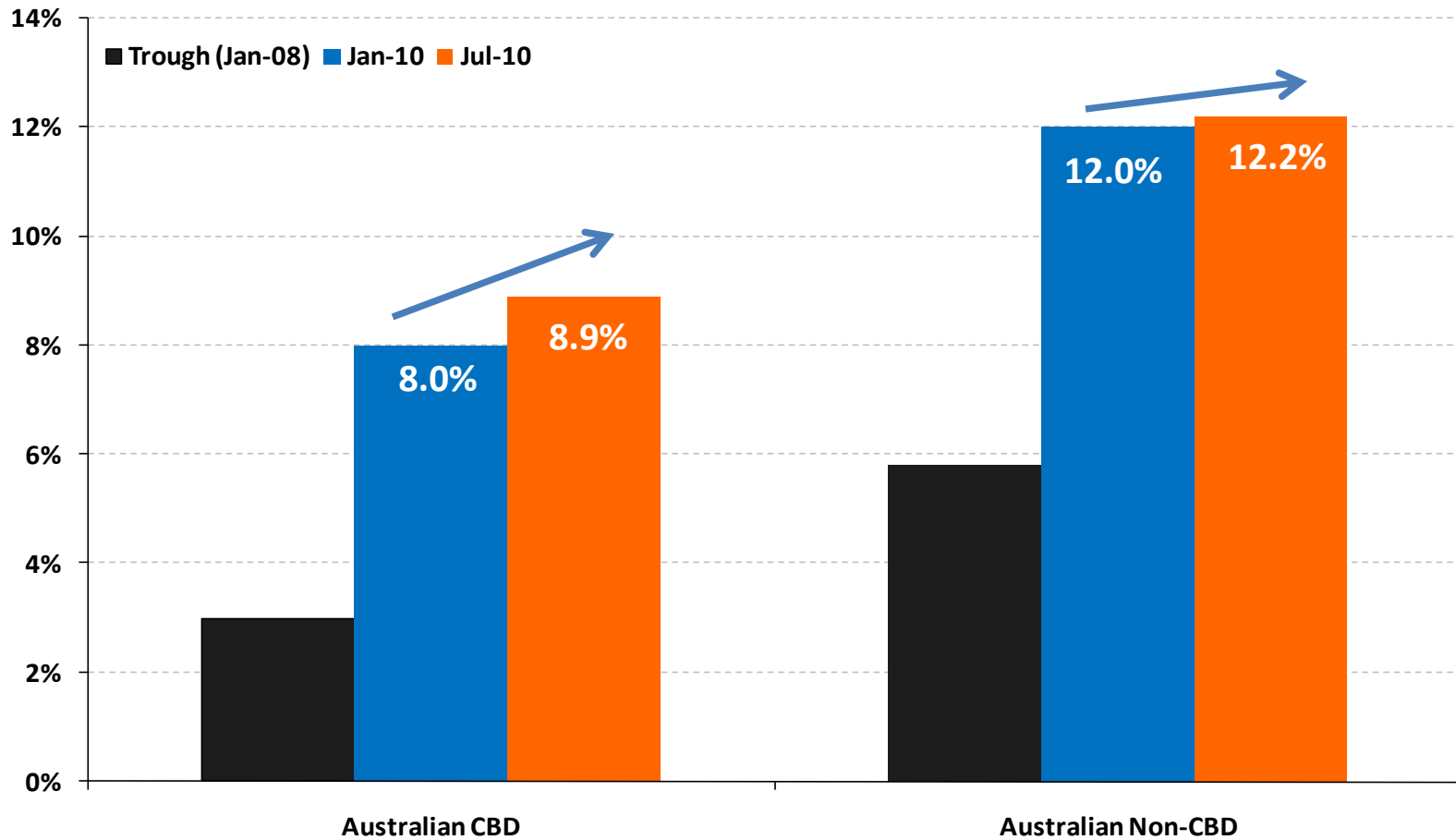
## National Office Vacancy





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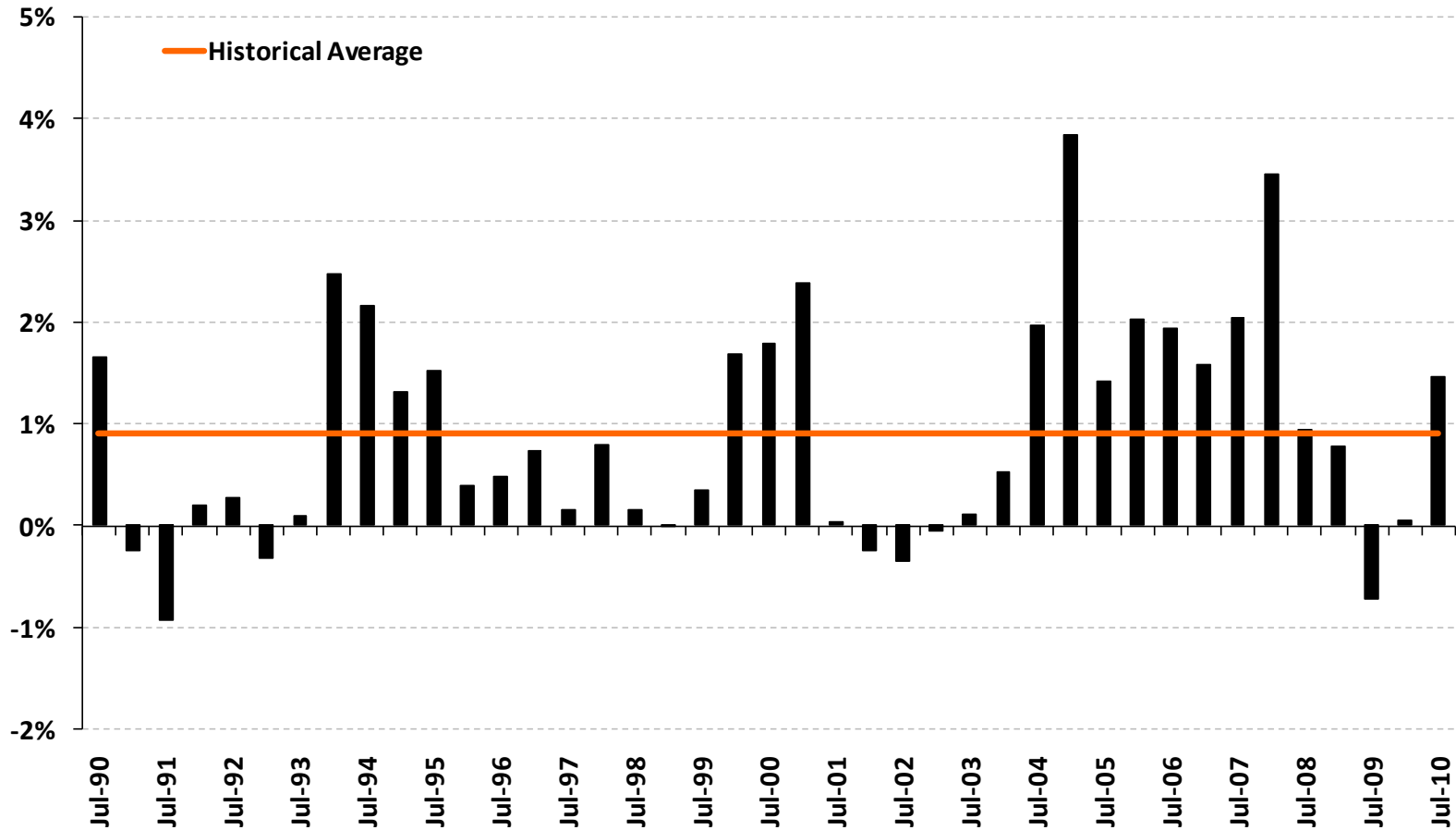
## Australian CBD v Non-CBD Vacancy





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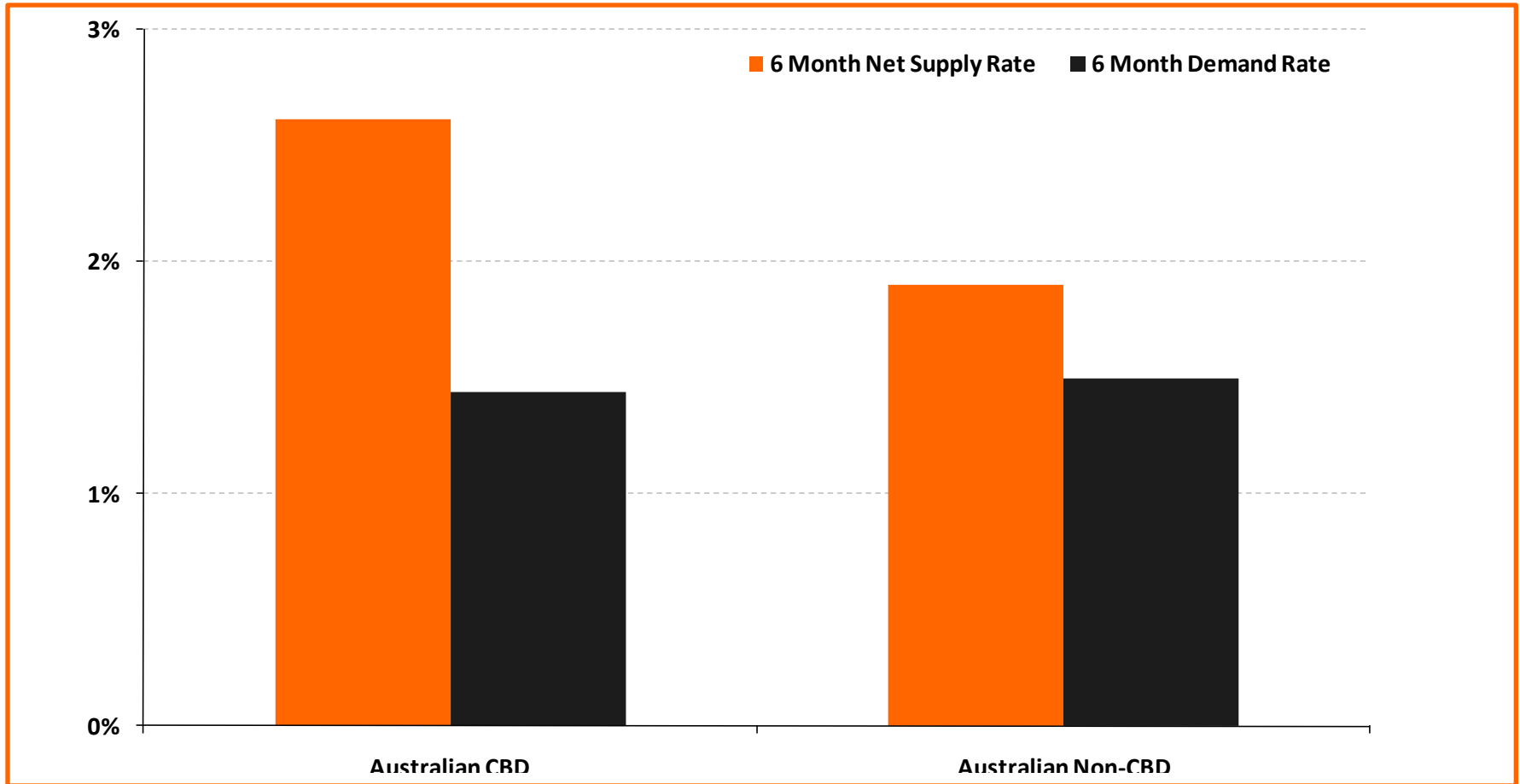
## Australian Office Historical Demand





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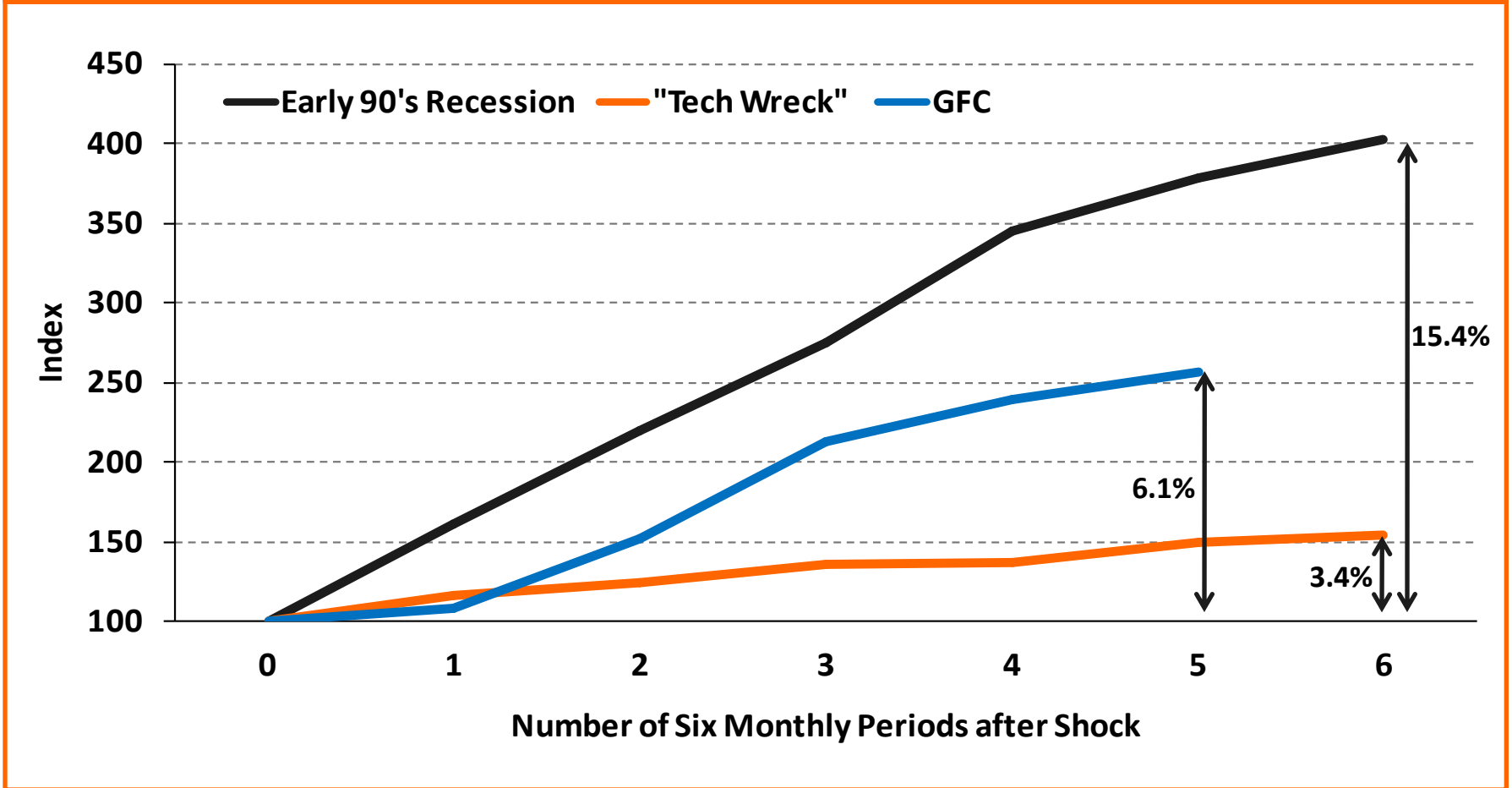
## Australian CBD v Non-CBD – Net Supply v Net Demand





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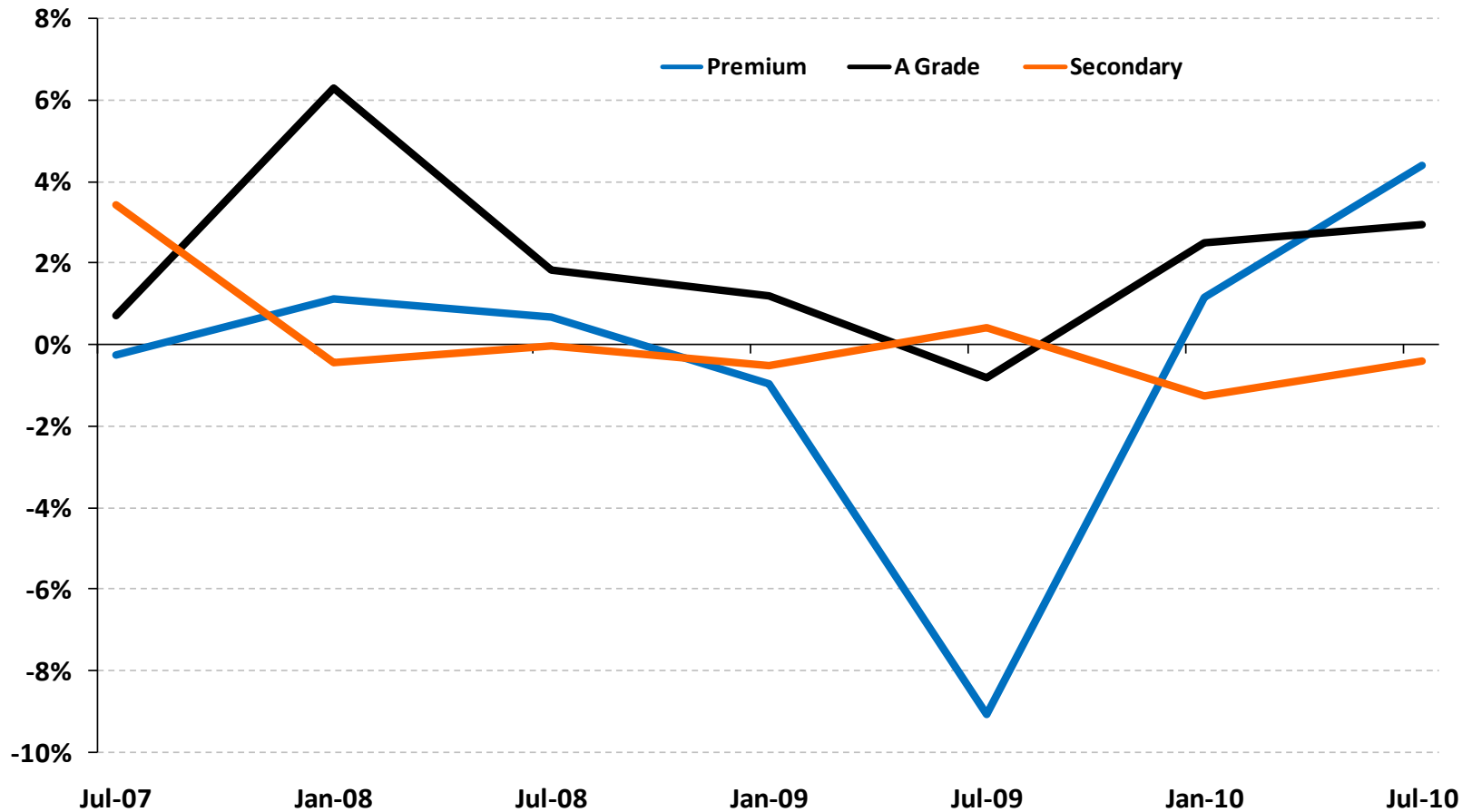
## Market Corrections – Australian Office Vacancy





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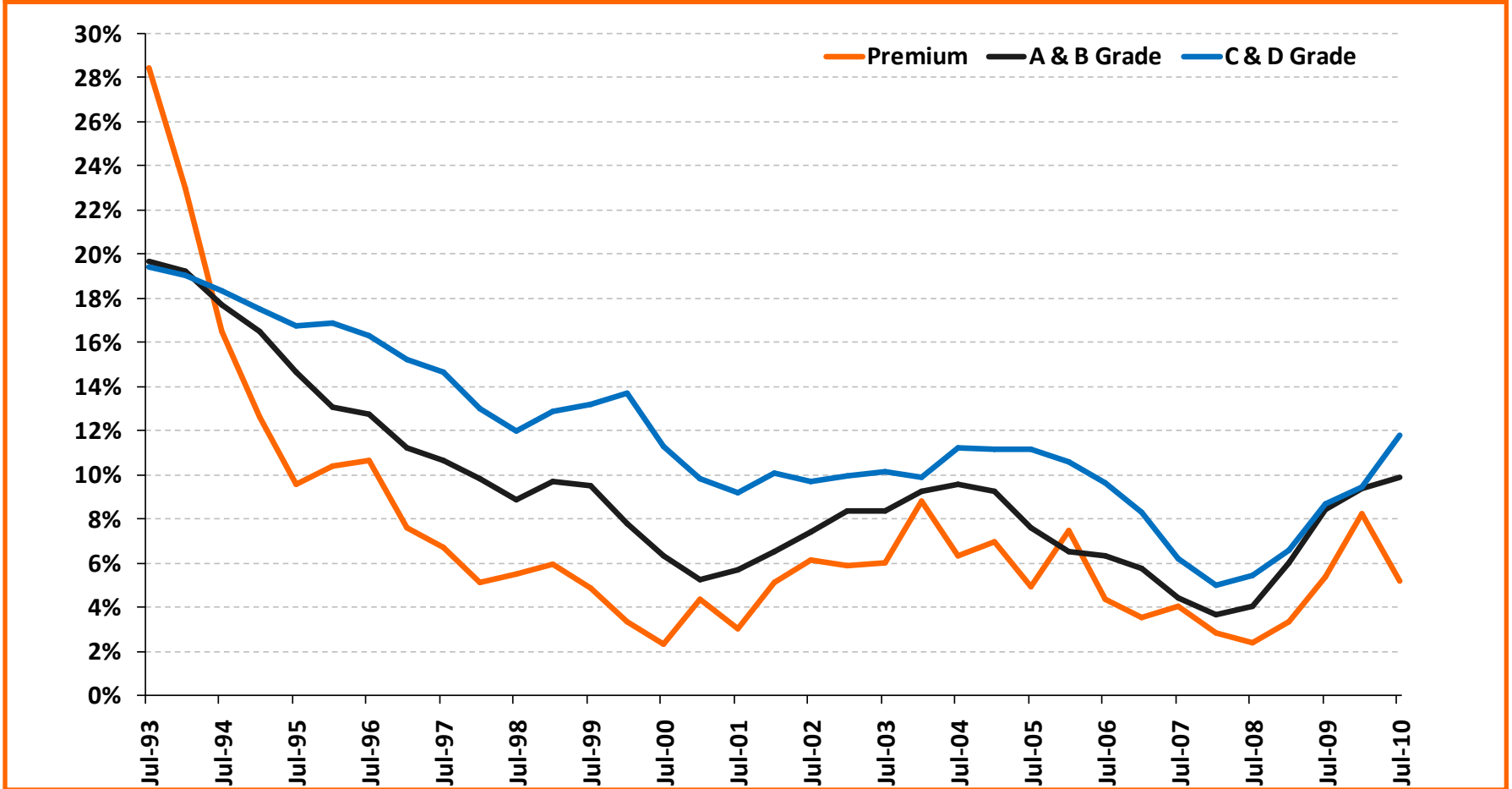
Net Absorption as a percentage of Total Stock (Australian CBD)





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## Historical Vacancy – Australian Office by Grade

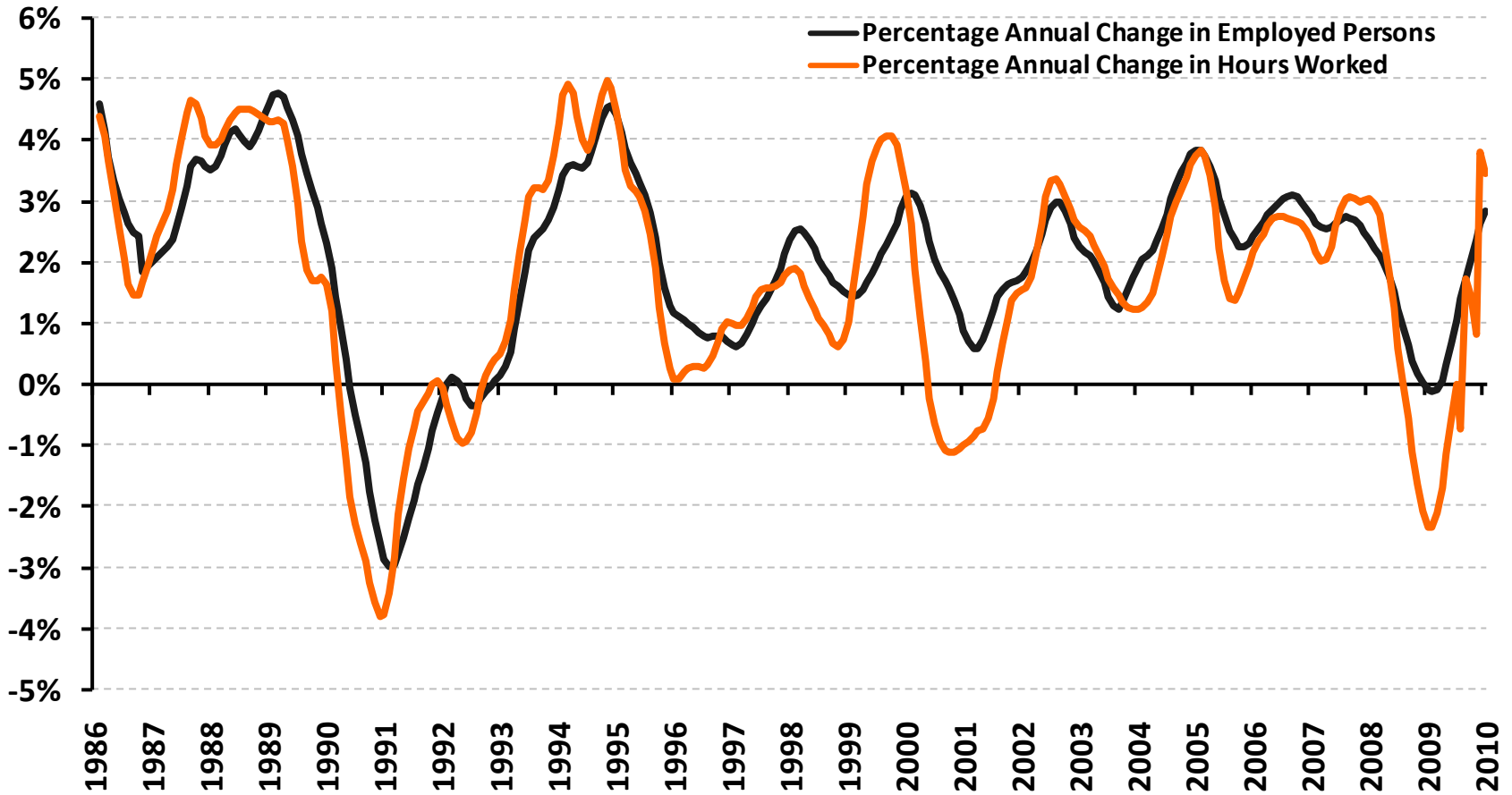






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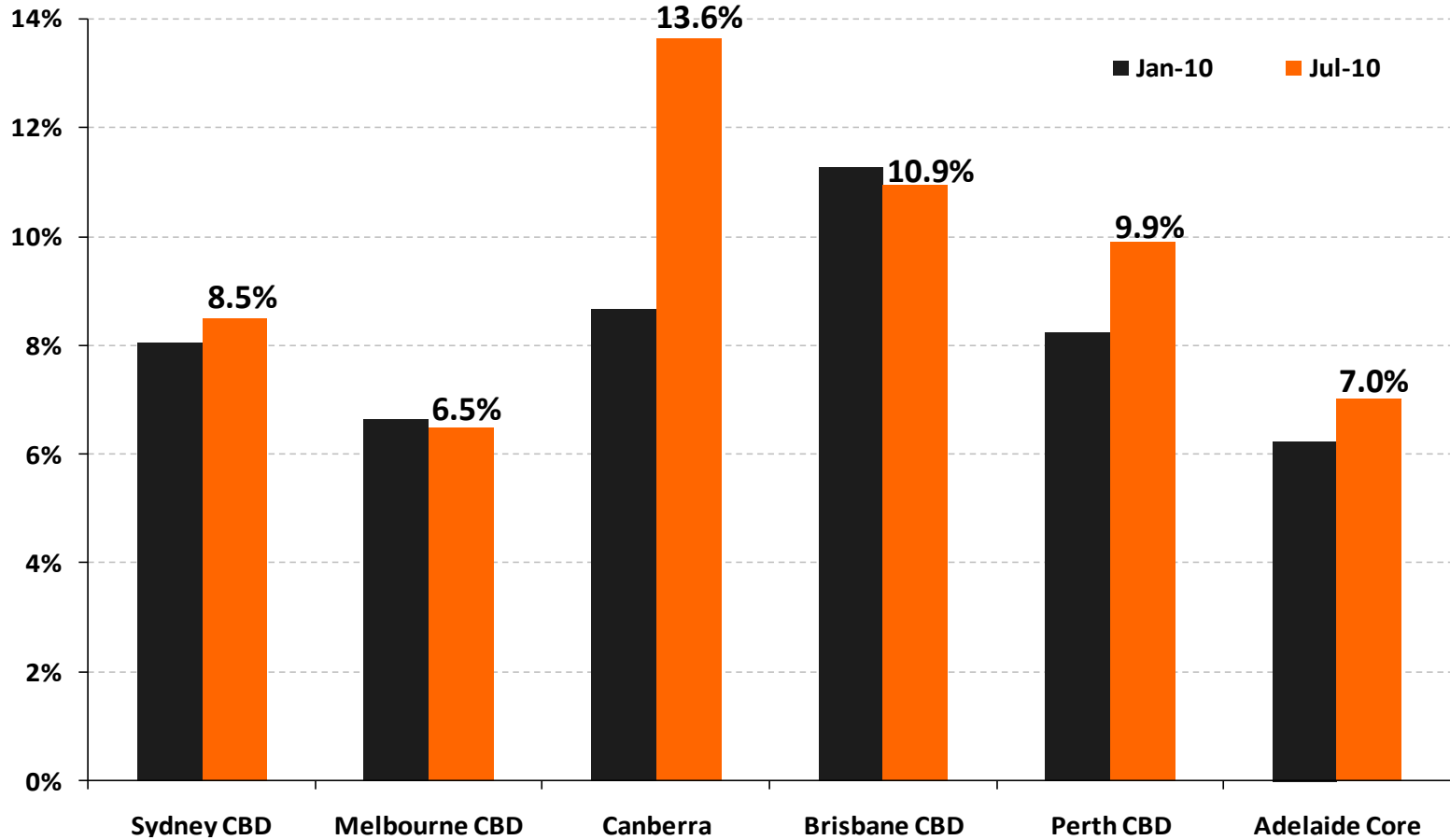
## Tenant Demand Drivers – Employment





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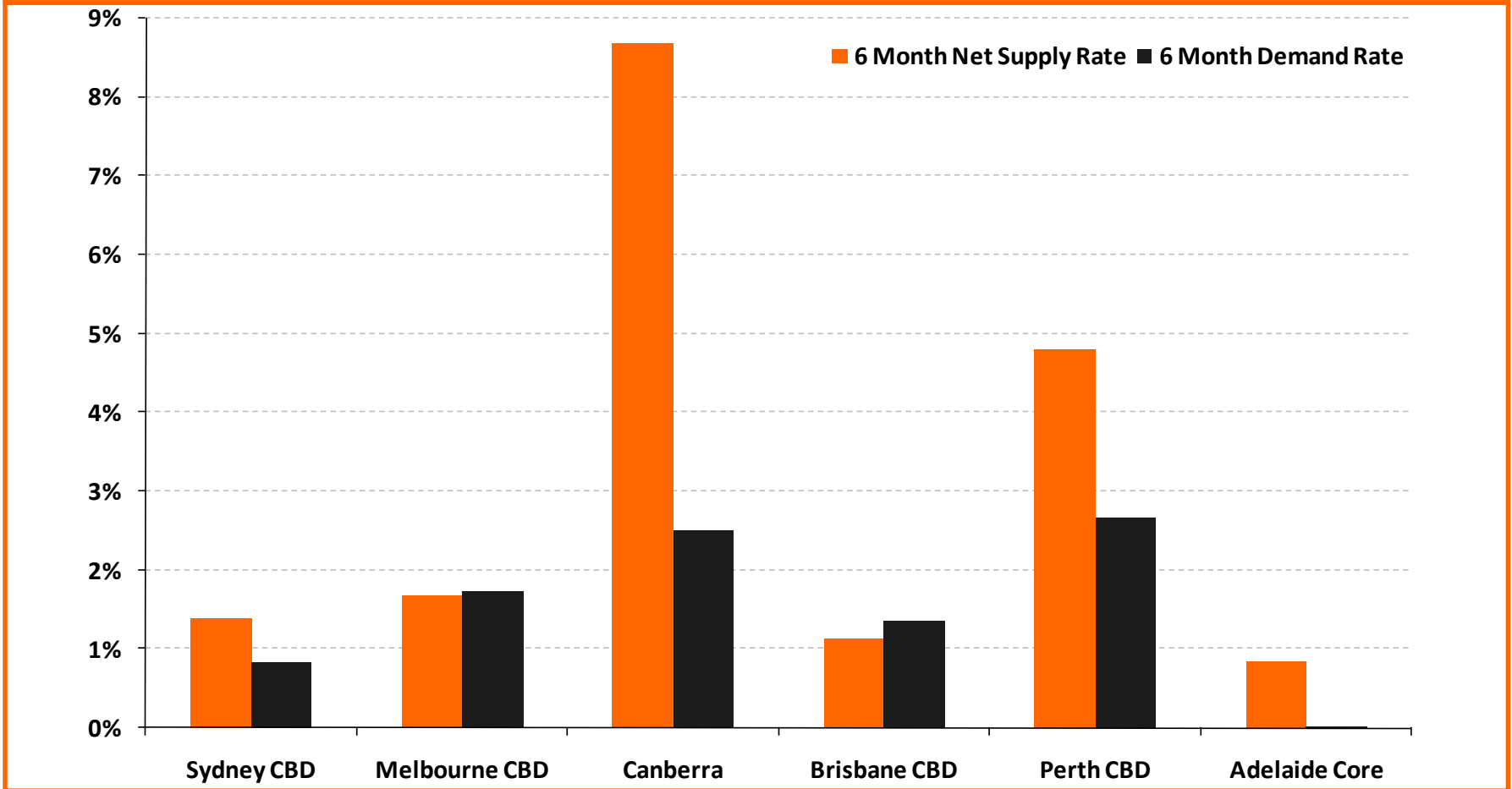
## Capital Cities – Total Vacancy





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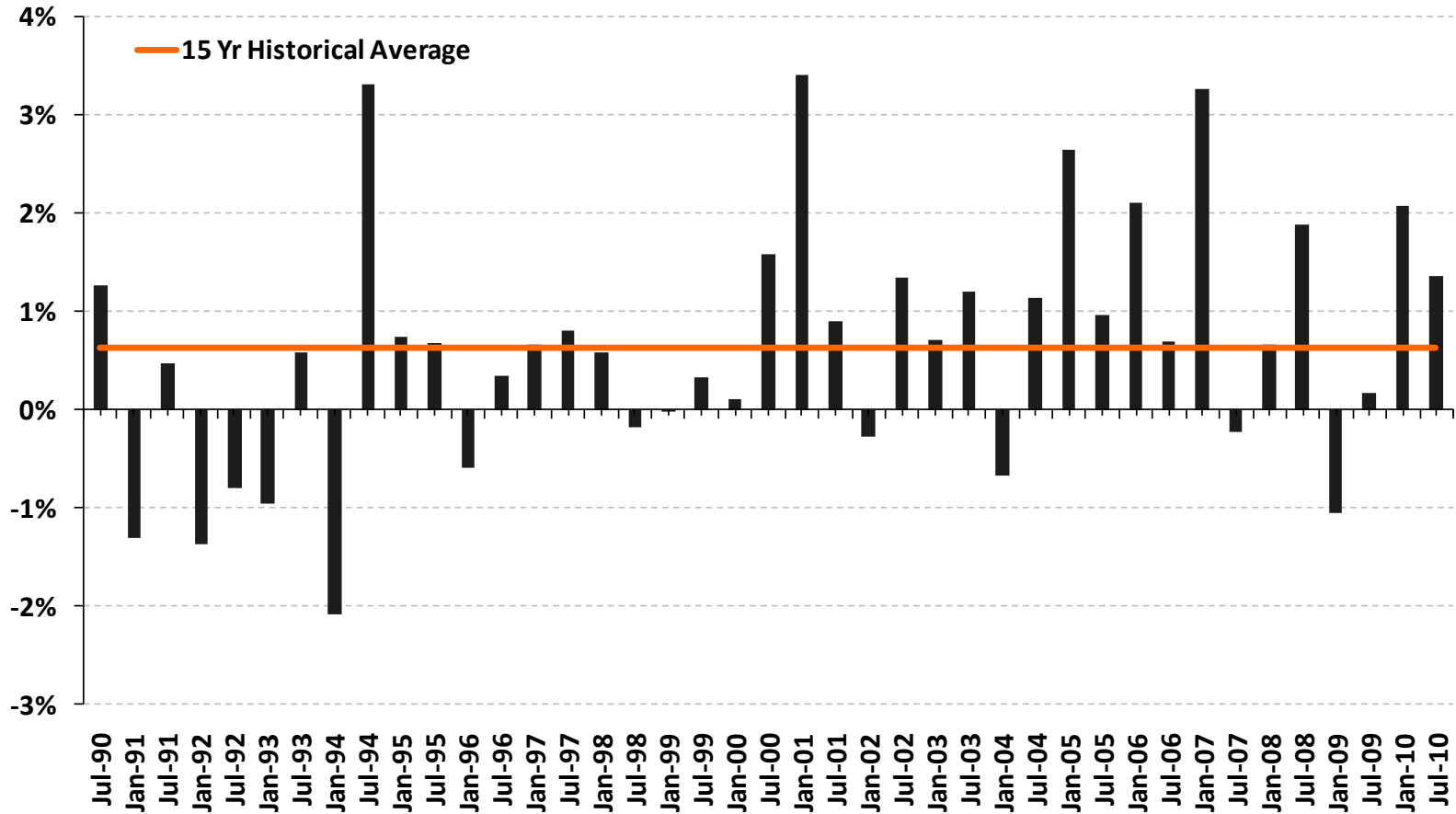
## Australian CBD Markets – 6 month Net Supply v Net Demand





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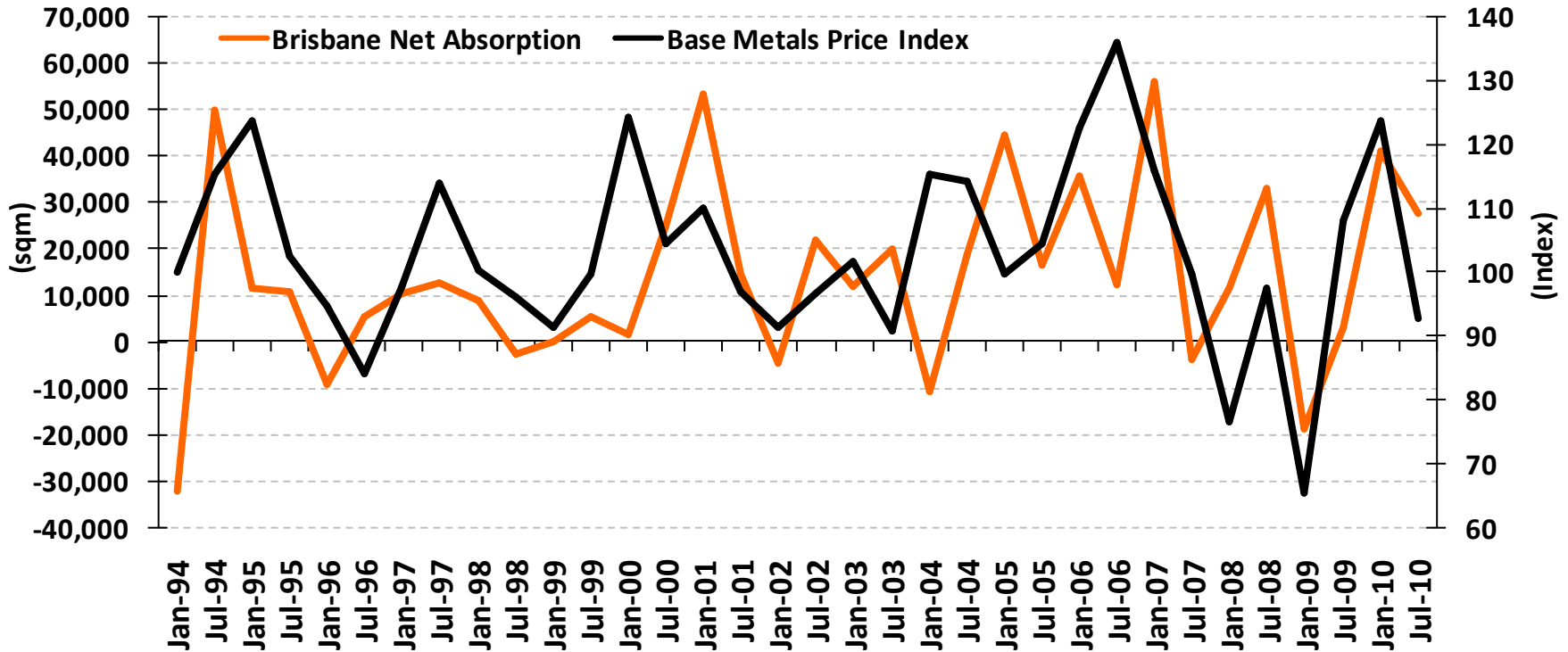
## Brisbane CBD Historical Demand





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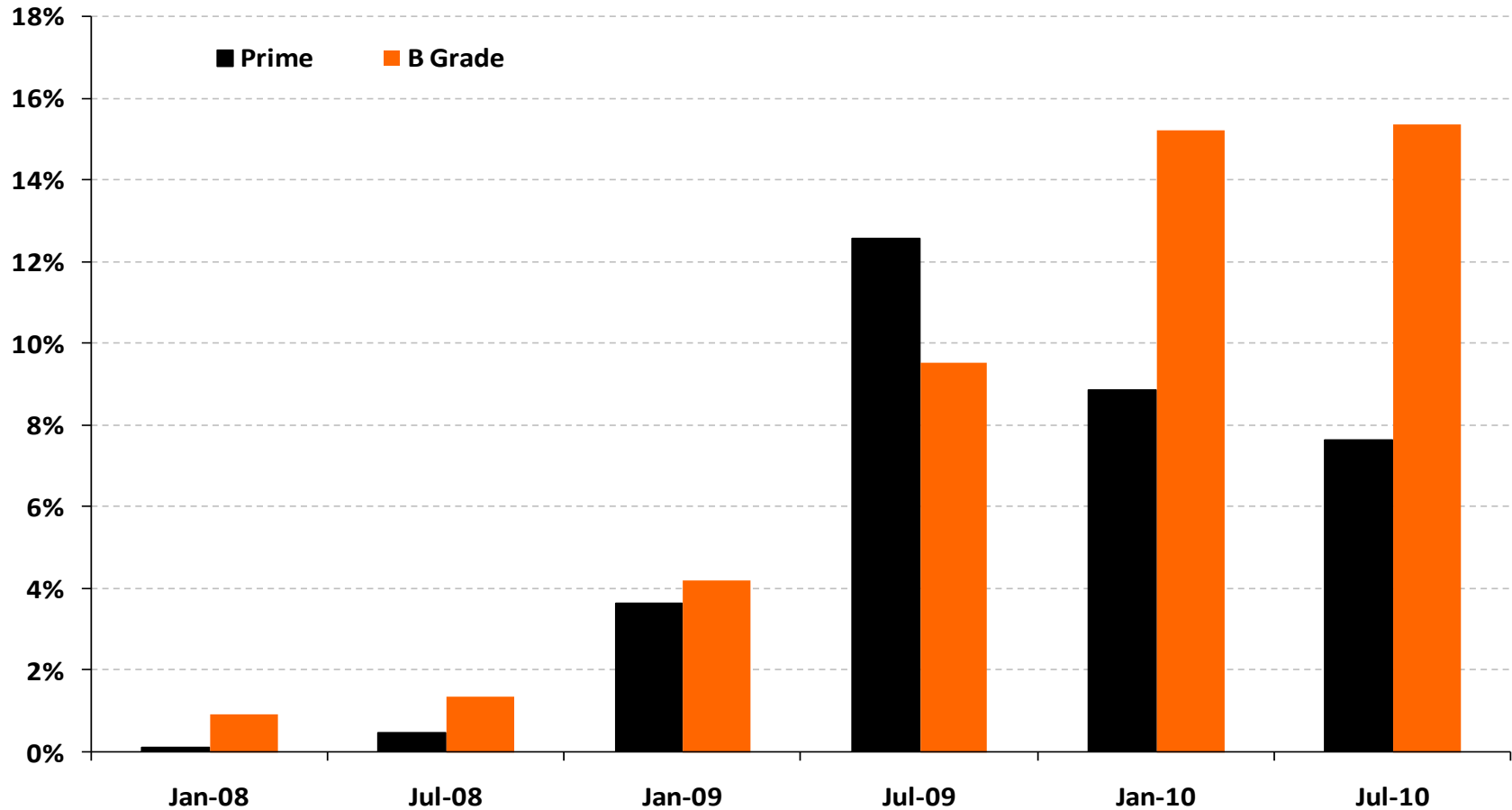
Brisbane CBD Net Absorption v Base Metals Price Index – Correlation = 0.41





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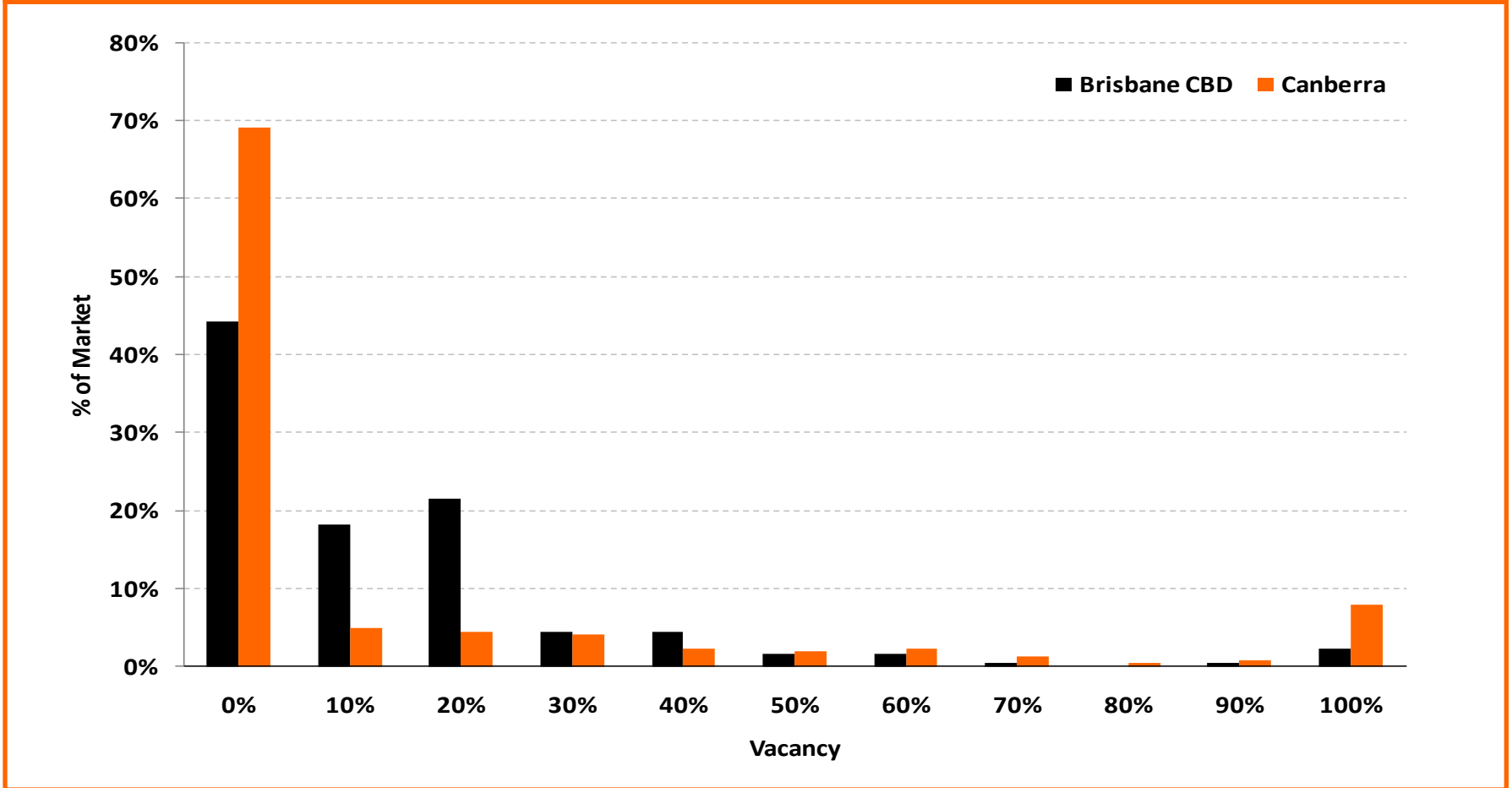
## Brisbane CBD Vacancy by Grade





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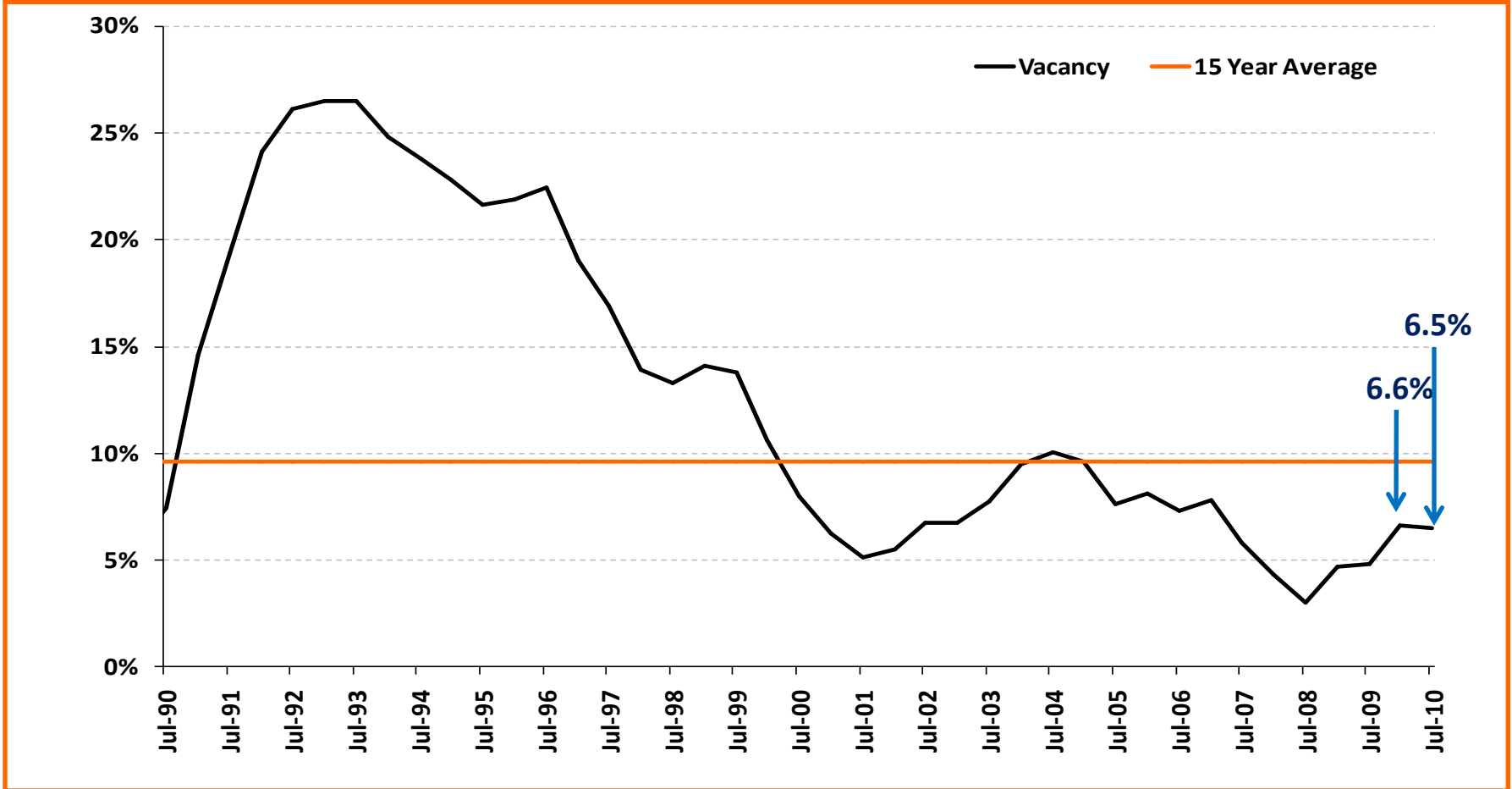
## Prevalence and Severity – Brisbane CBD v Canberra





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## Melbourne CBD Historical Vacancy

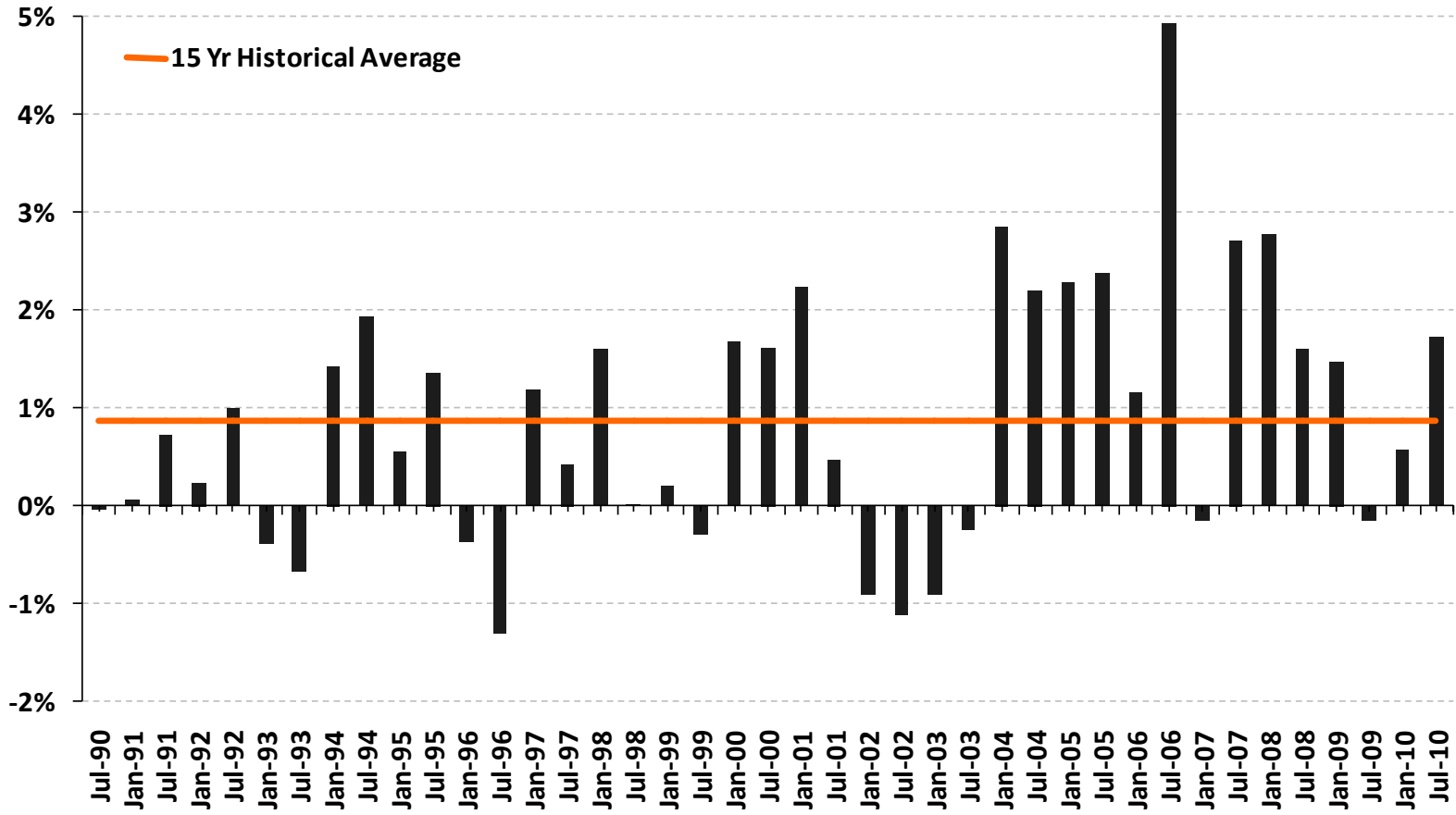






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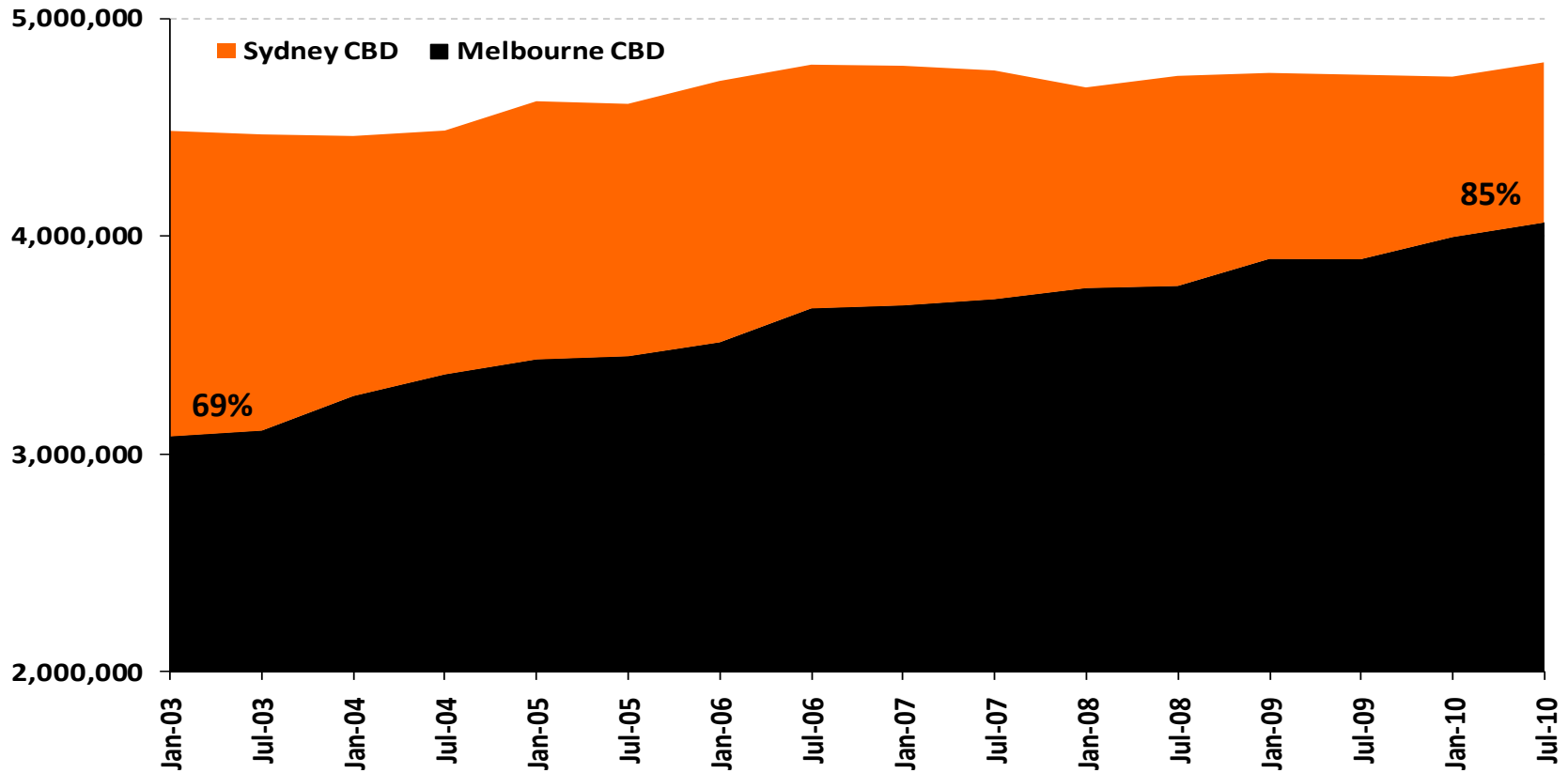
## Melbourne CBD Historical Demand





# Office Market Report – July 2010

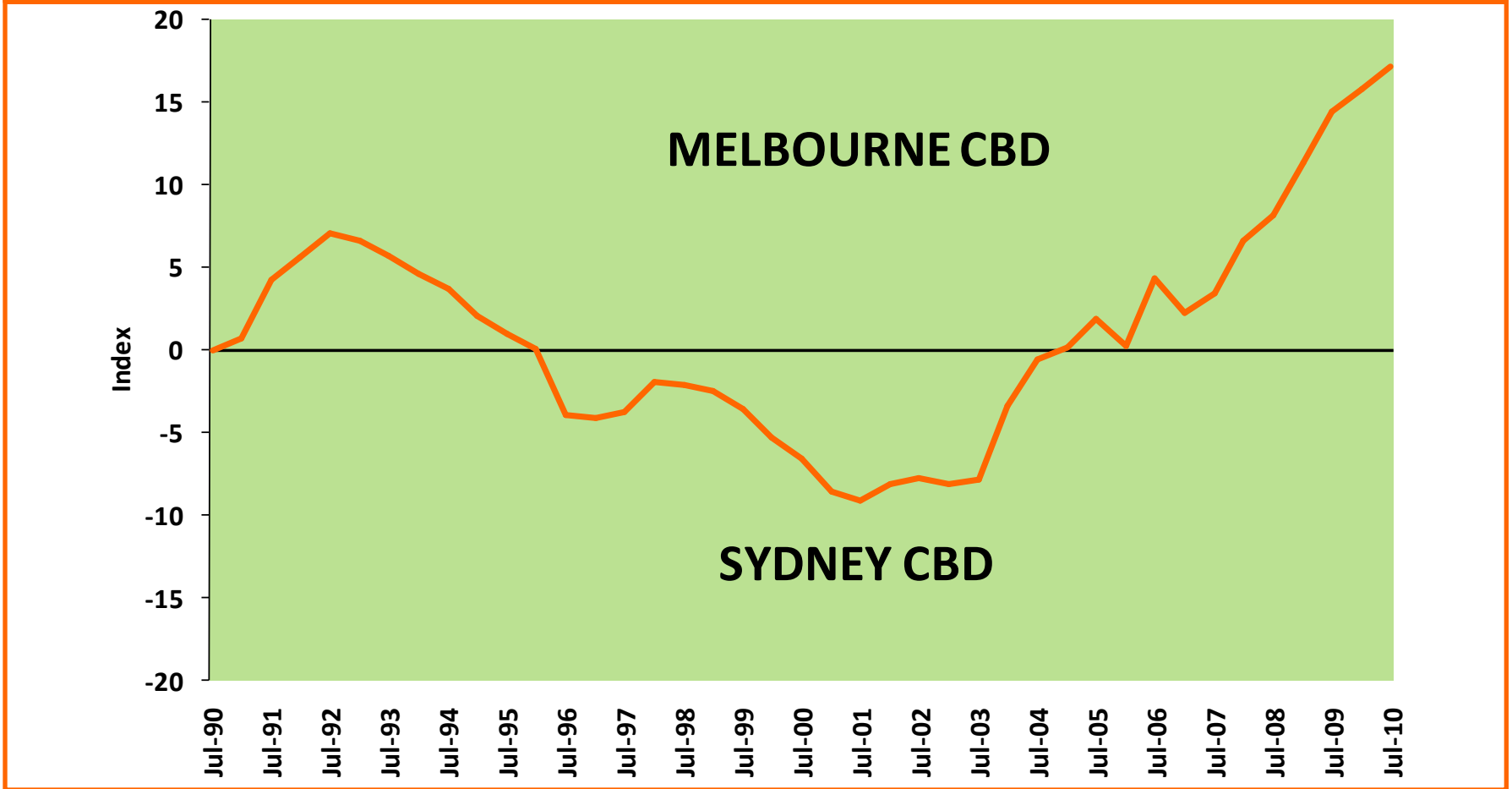
## Melbourne CBD v Sydney CBD Stock





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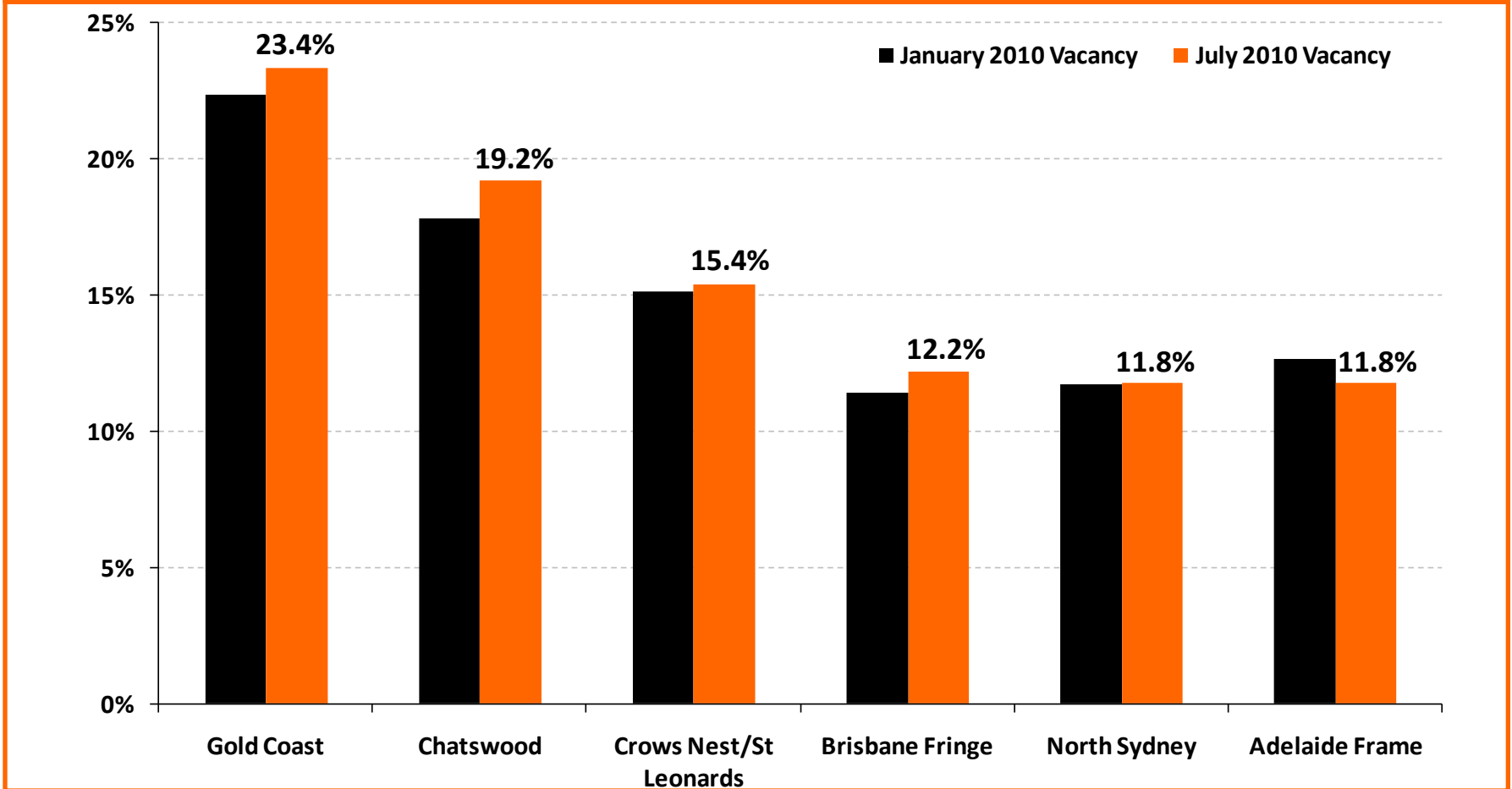
Tenant Possession – Sydney CBD v Melbourne CBD 1999-2010





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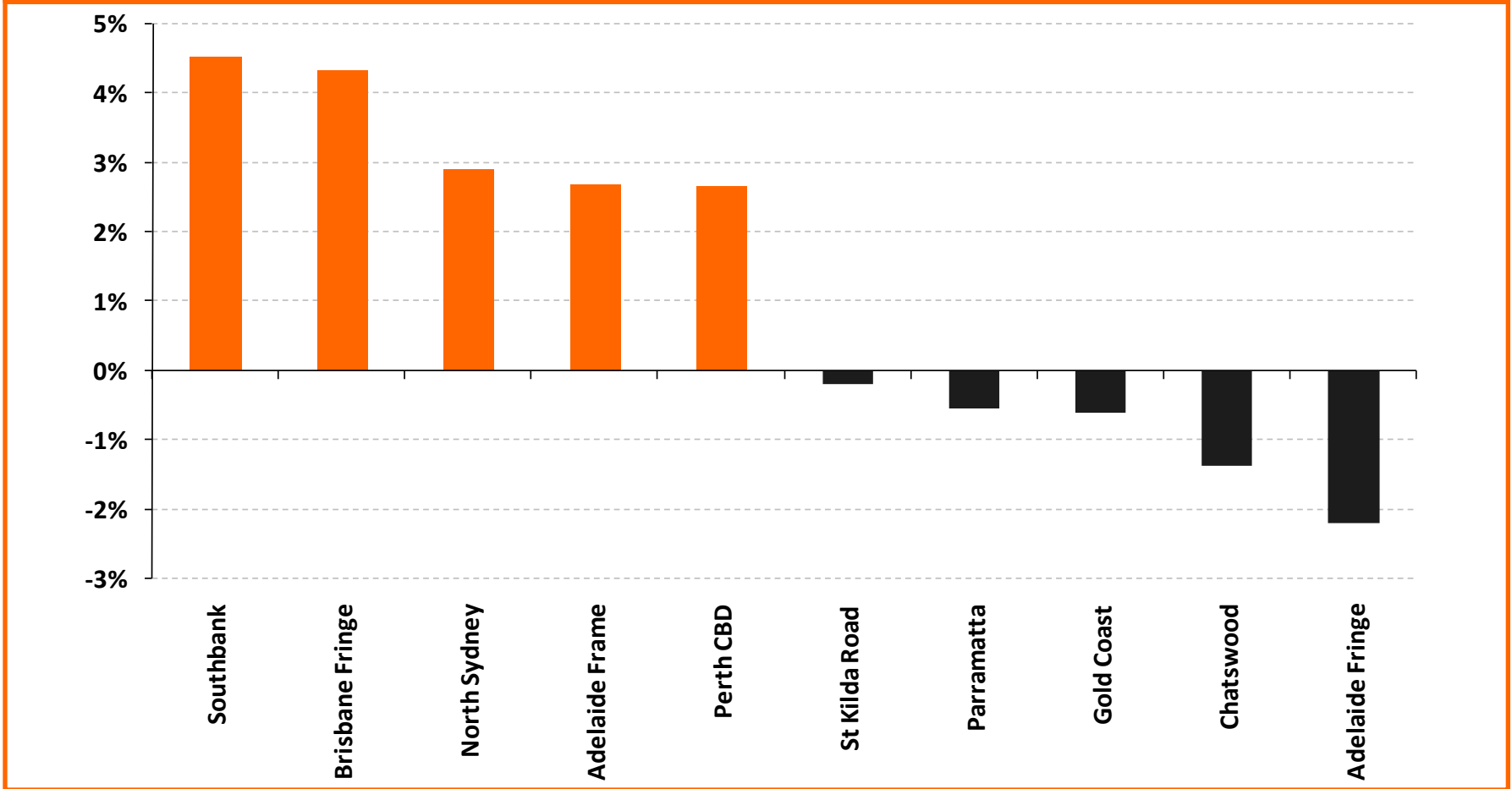
## Non- CBD Highest Vacancy Rates





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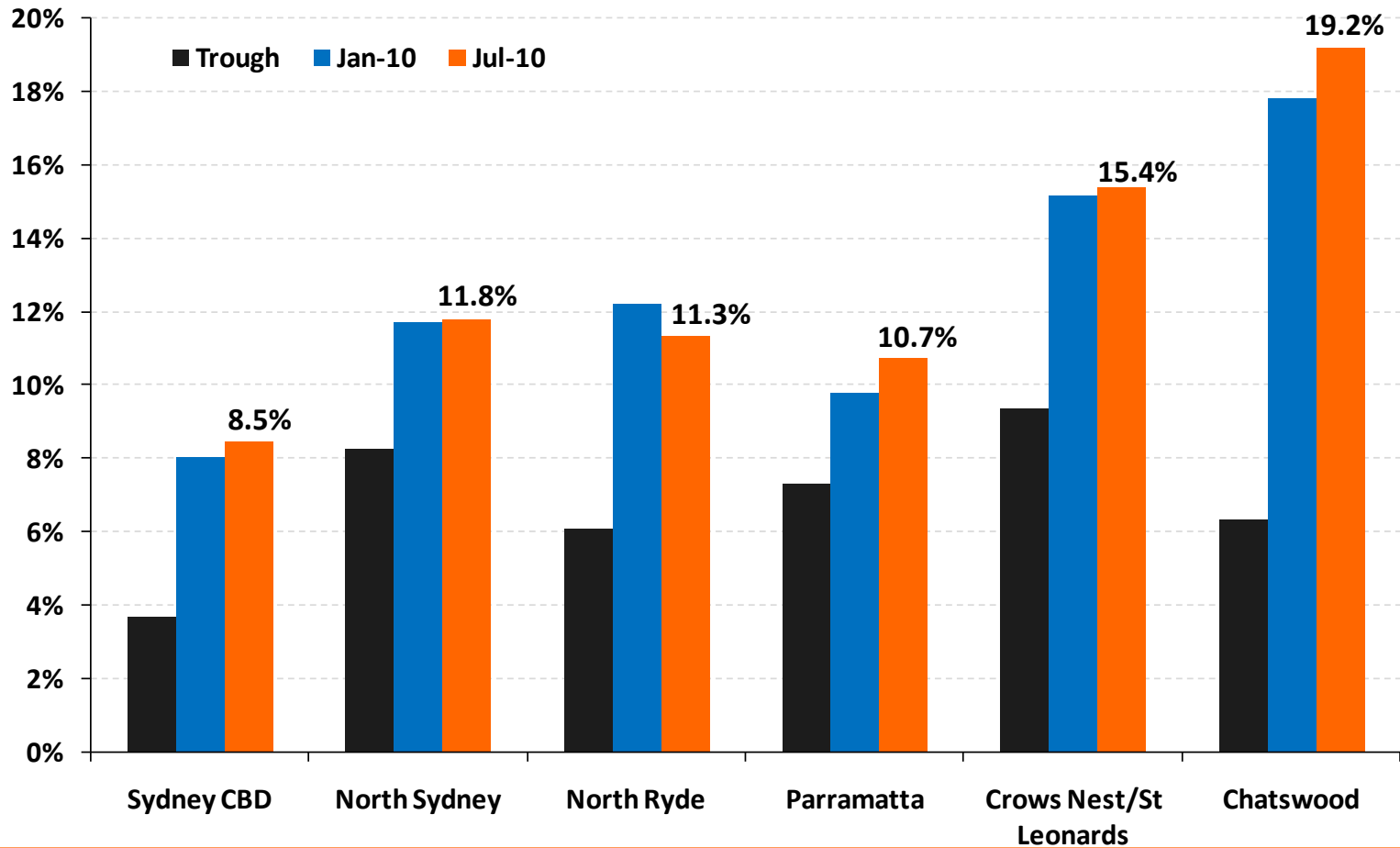
## Best and Worst Demand





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## NSW Market Vacancy





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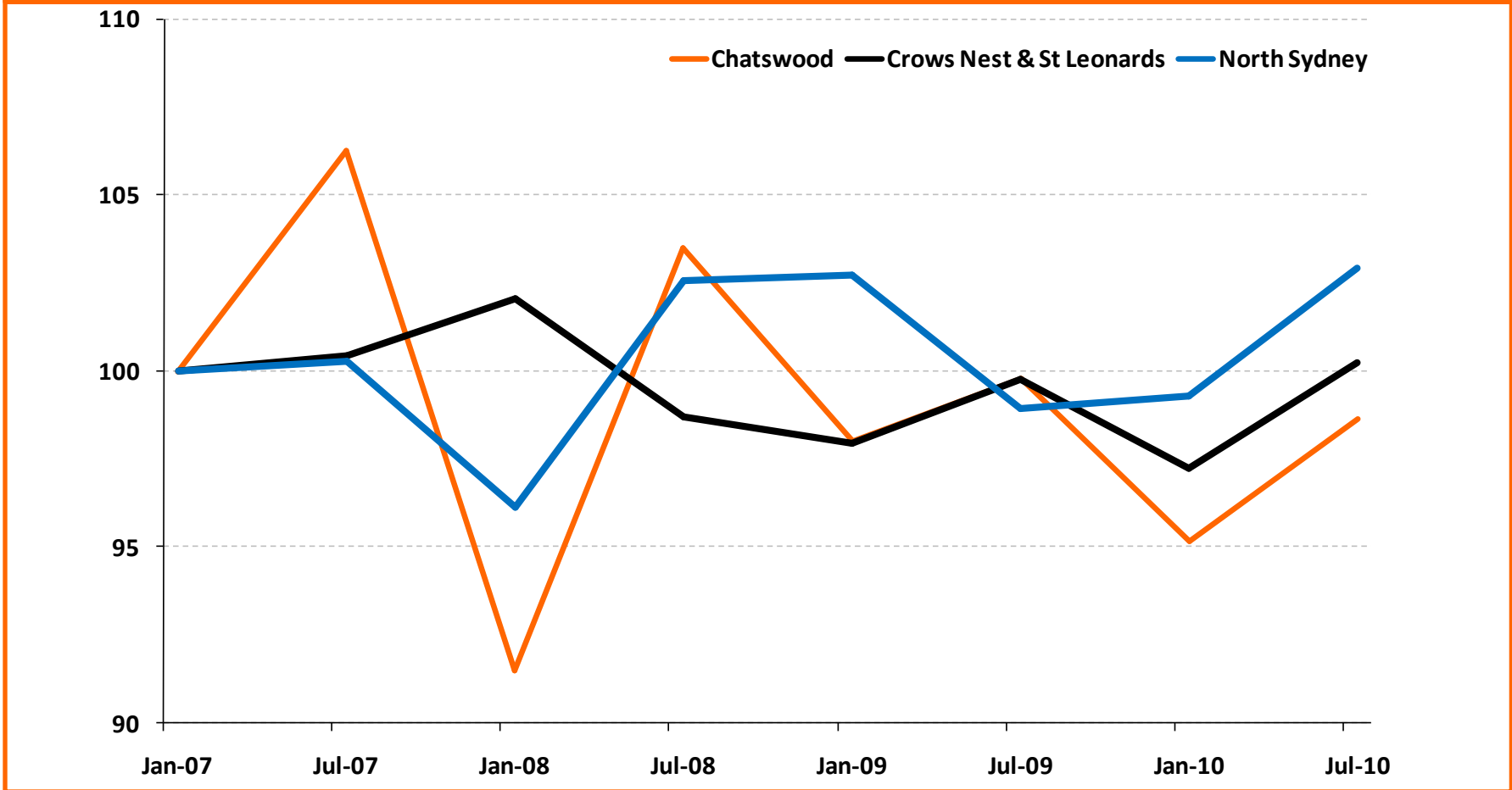
## NSW Market Net Supply v Demand





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## North Shore Demand

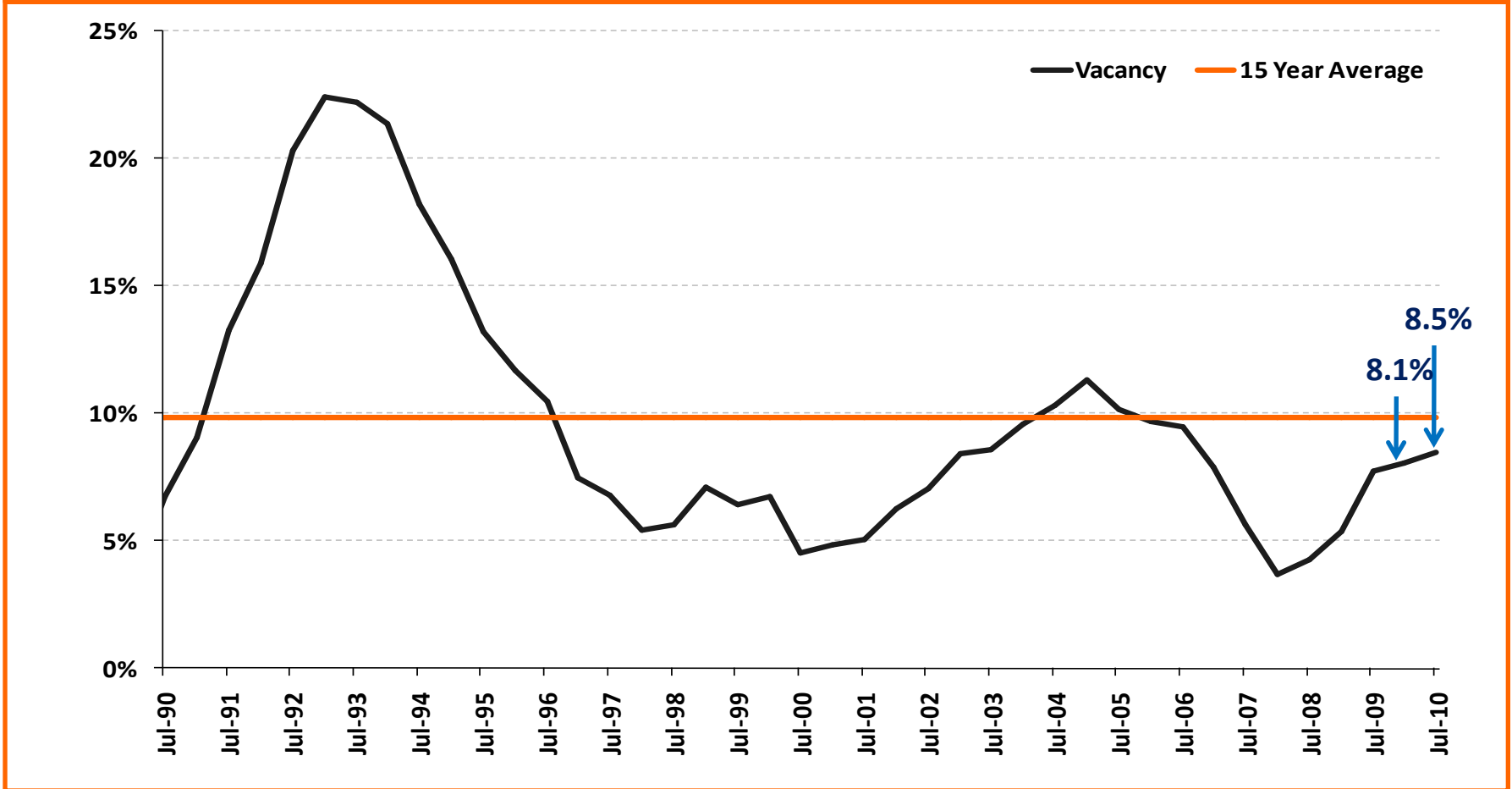






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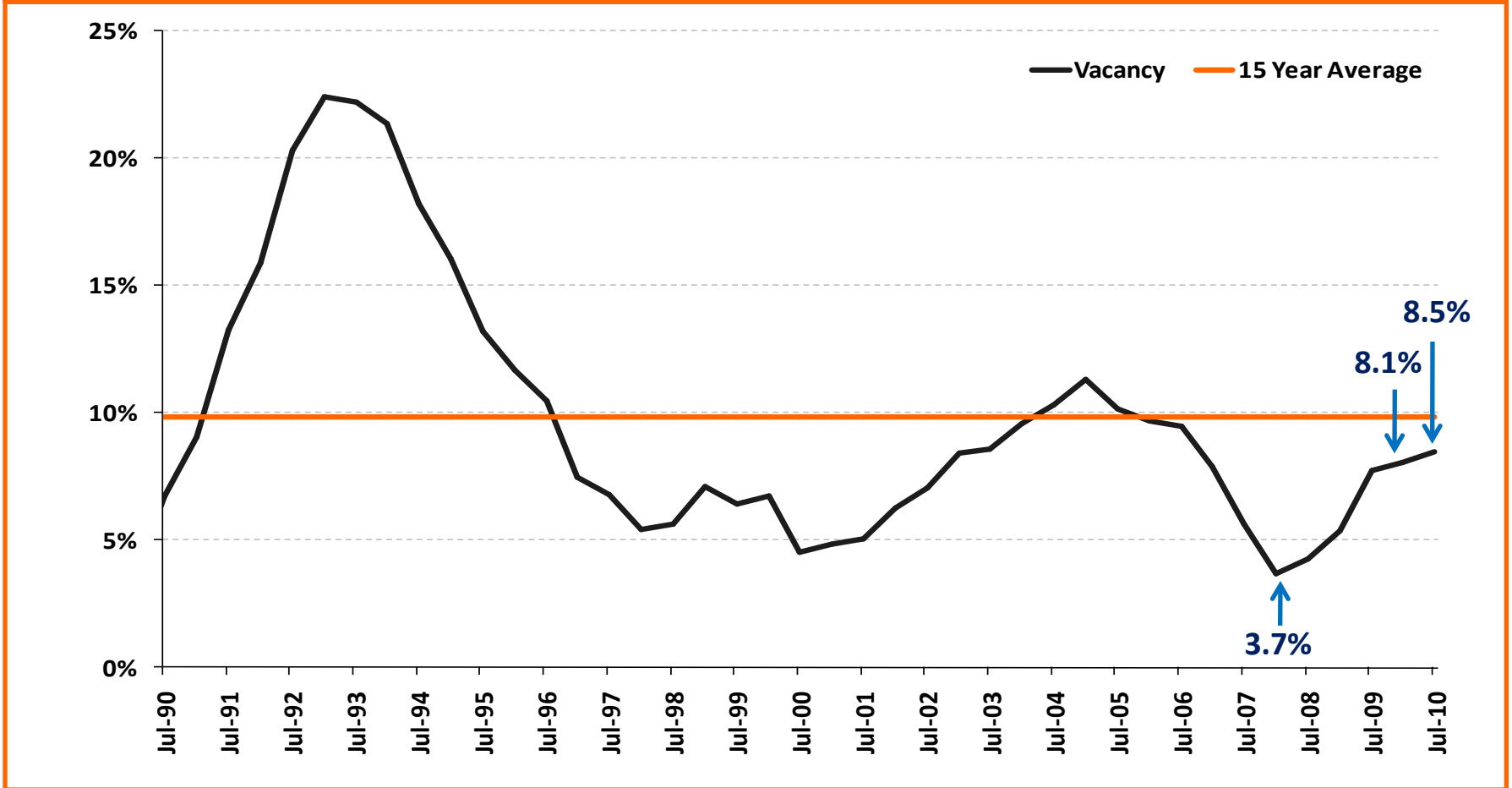
## Sydney CBD Historical Vacancy





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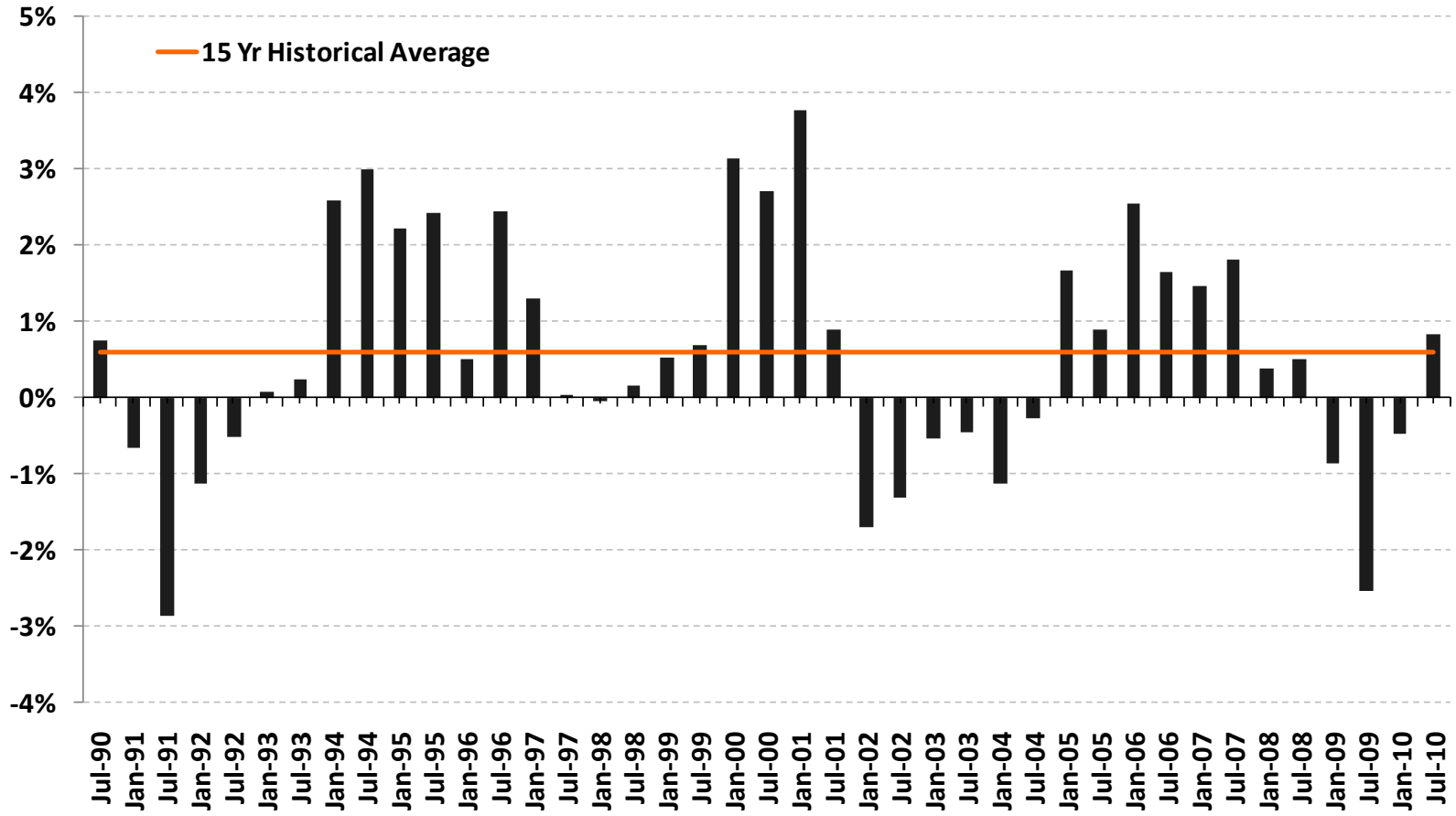
## Sydney CBD Historical Vacancy





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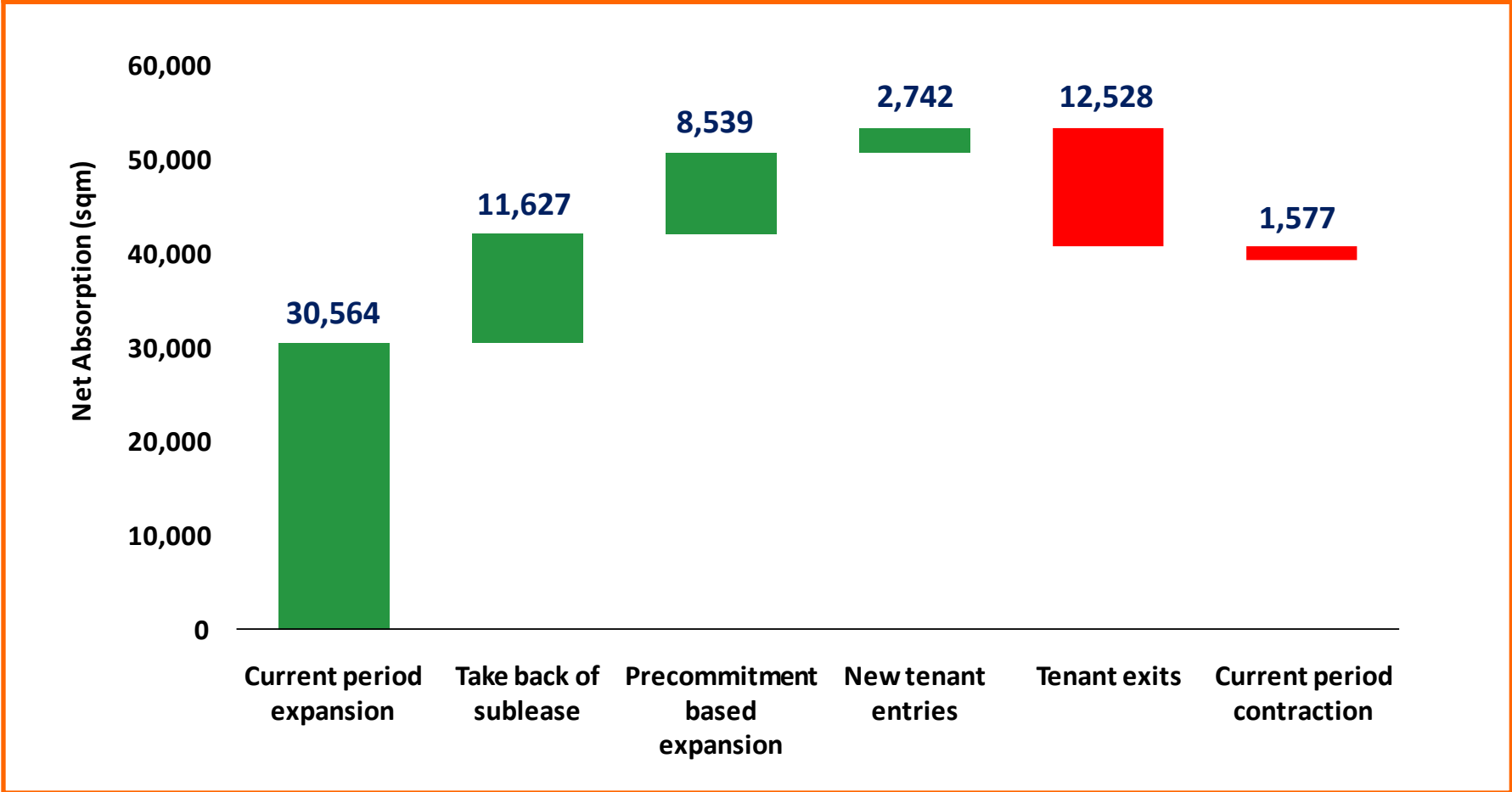
## Sydney CBD Historical Demand





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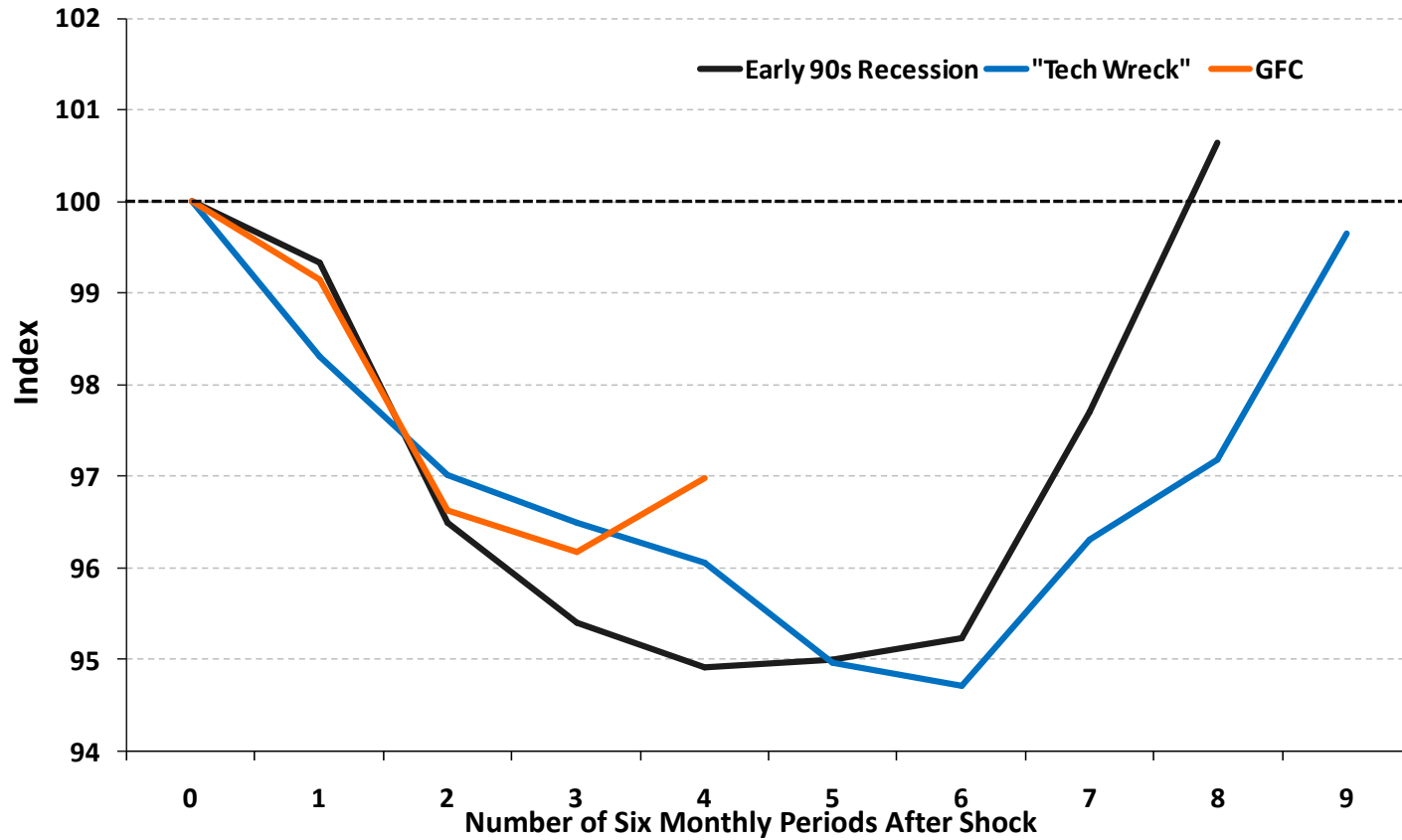
## Sydney Net Absorption Attribution





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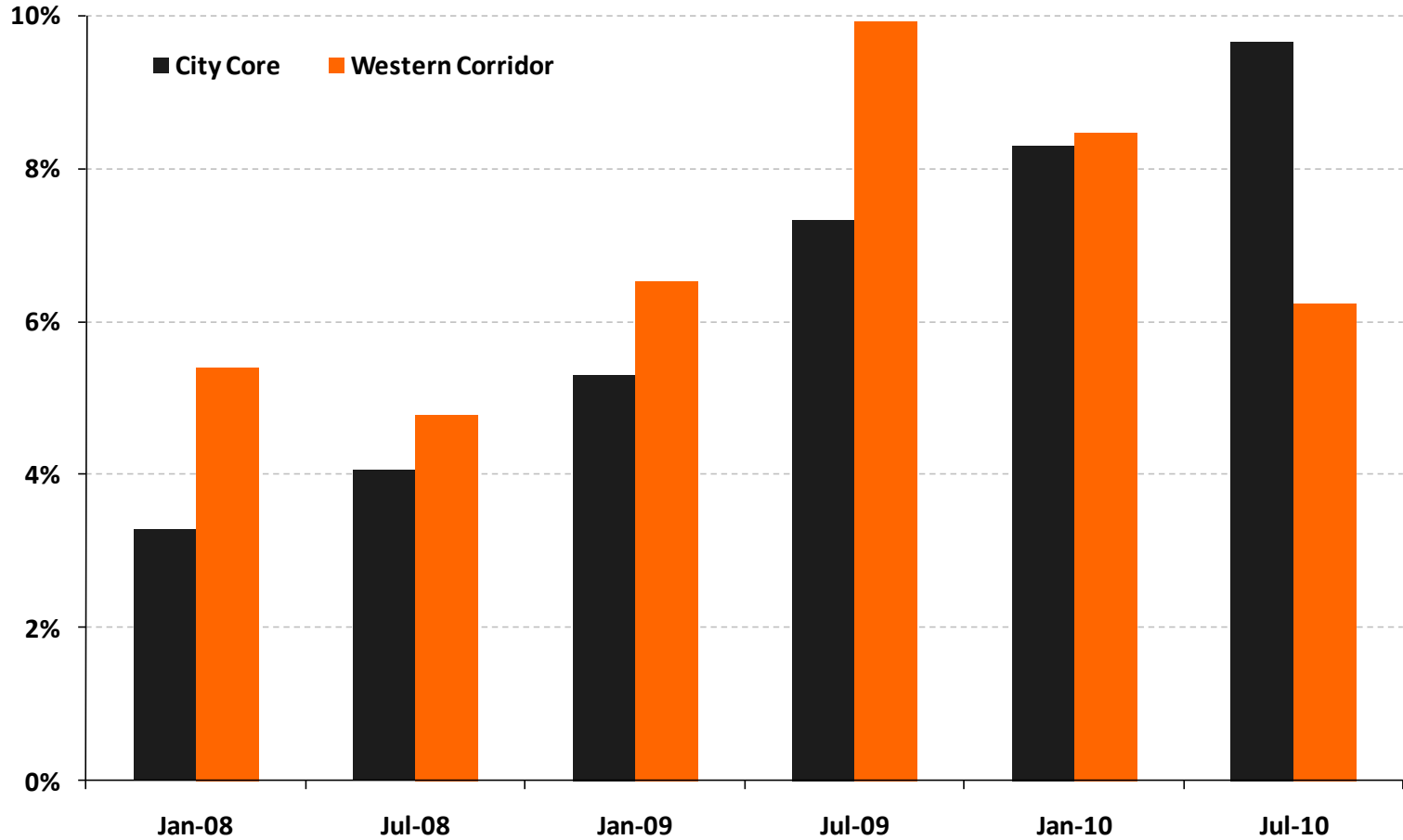
## Market Corrections – Sydney CBD Net Absorption





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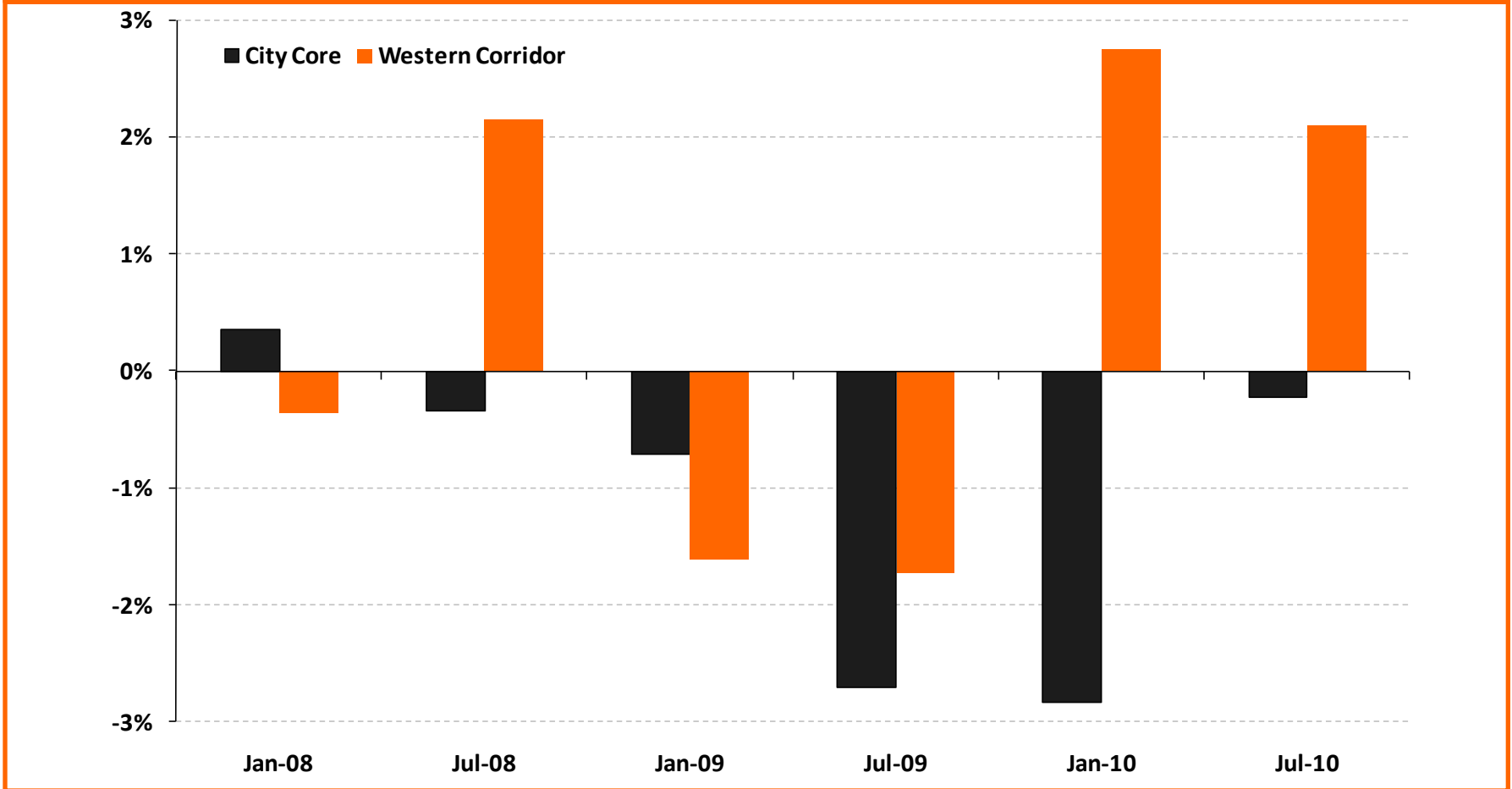
## Sydney CBD Vacancy by Sub-locale





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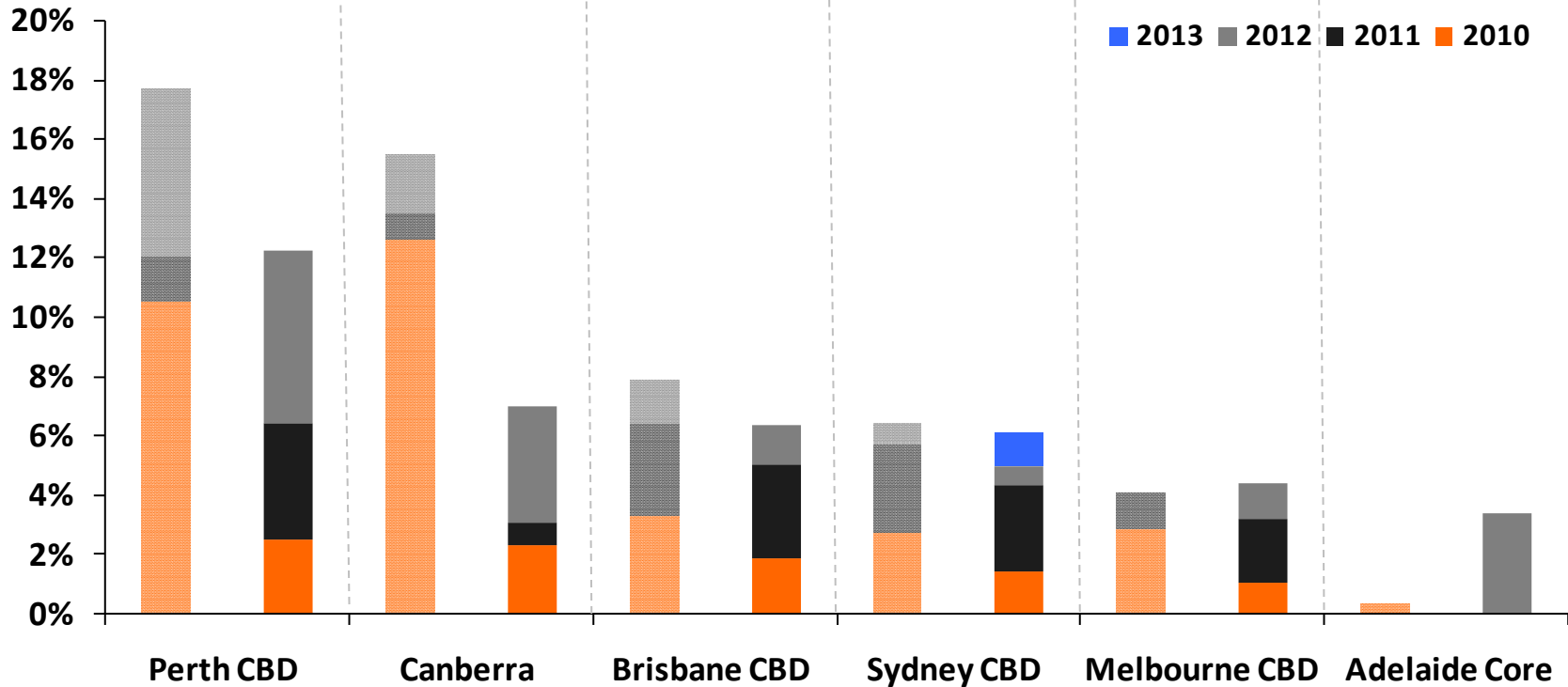
## Sydney CBD Net Absorption by Sub-locale





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## Future Supply of CBD Markets

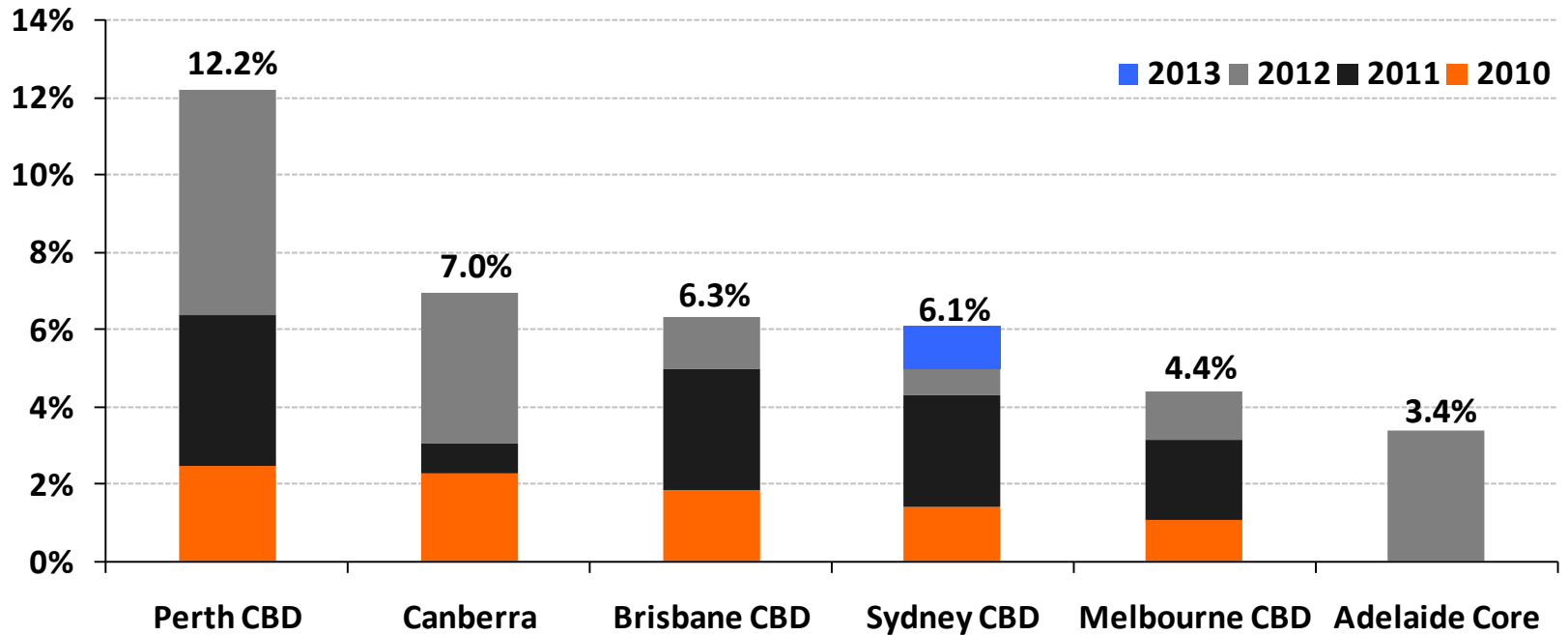






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## CBD Future Supply Forecast



Supply m <sup>2</sup>	175,054	152,630	129,603	292,563	177,977	34,000
Pre-Commitment	70%	44%	37%	54%	64%	88%



## Further Information

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