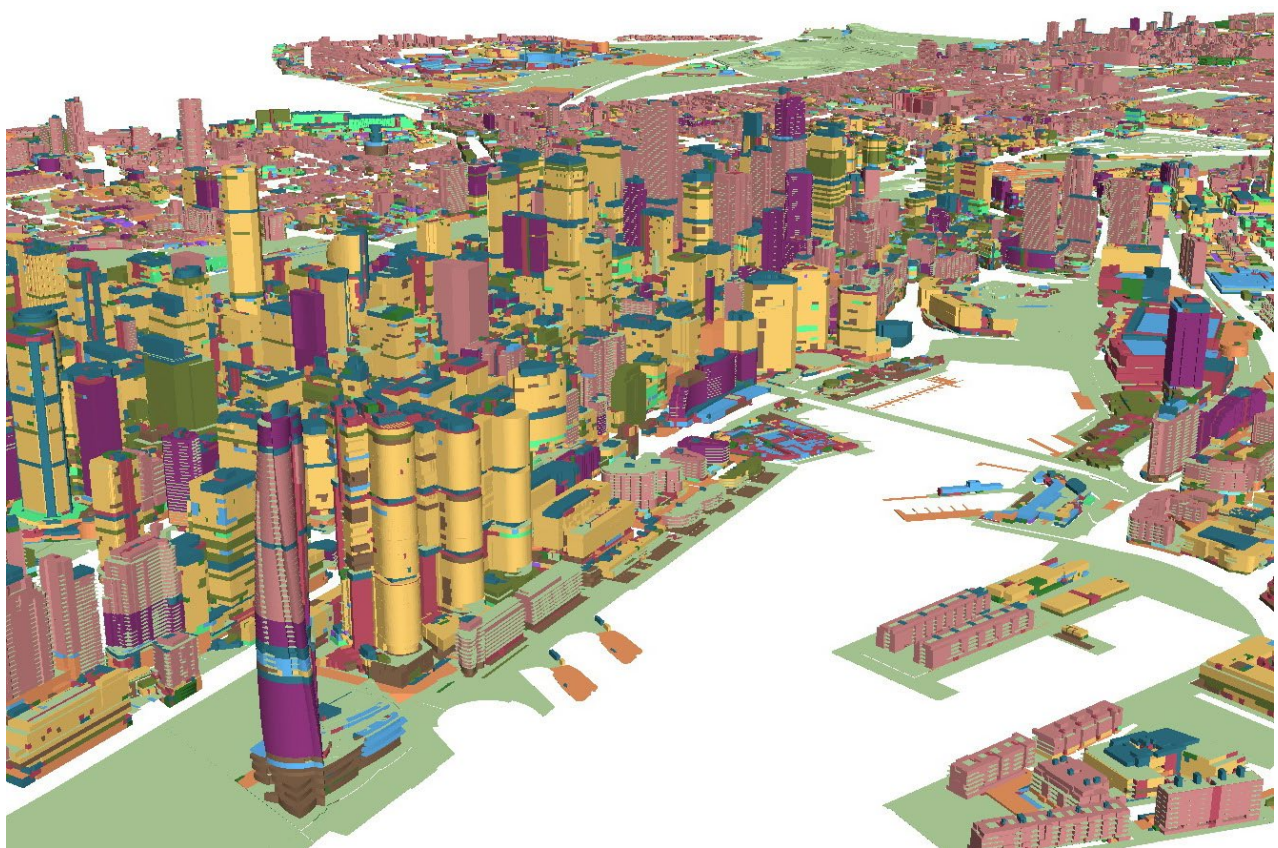


# Floor Space and Employment Survey Summary Report 2022



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# Introduction

## Overview

The City of Sydney undertakes its comprehensive Floor Space and Employment Survey (*FES or Survey*) every five years to coincide with the Australian Bureau of Statistics' Census of Population and Housing. The 2022 FES is the fourth Survey to encompass those areas amalgamated into the City of Sydney from the former South Sydney and Leichhardt Councils in 2004 and allows the City to investigate and report on changes in workforce, businesses, and floor space across Surveys.

The FES collects data on all businesses, floor space uses and employment numbers for every building or property within the City of Sydney local government area. It provides a snapshot of the built form, land uses and economic activity of the City every five years. The field data captured for the current Survey was undertaken between September 2022 and June 2023.

The data collection phase of the FES involves field surveyors visiting every business in the City of Sydney to determine what industry the business is in, how many workers are in each business, and the floor space use of each business through visual inspection and the use of existing floor space. Information for various capacity measures such as quantity of seating, parking, rooms and units are also collected. Residential uses are surveyed from the street and validated using existing floor plans, aerial photography and other sources. The data is entered into a Geographic Information System (GIS) database to allow 2- and 3-dimensional mapping, analysis and reporting.

The data is used by both internal and external stakeholders as a basis for strategic planning, policy formulation, business development, monitoring and benchmarking, and forecasting.

The field data captured for the current Survey was undertaken between September 2022 and June 2023. The 2022 FES data was collected as the economic and spatial effects of the Covid-19 pandemic were winding down and a significant proportion the workforce was starting to return to the city. Many office-based industries had implemented work-from-home (WFH) policies, so the FES collected data on the number of jobs in each business establishment, as well as the number of workers on-site. This report focuses on the number of jobs in each industry sector in the city.

The City of Sydney has been divided into ten village groups; CBD and Harbour; Chinatown and CBD South; Crown and Baptist Streets; Glebe Point Road; Green Square and City South; Harris Street; King Street; Macleay Street and Woolloomooloo; Oxford Street; and Redfern Street (see Figure 1). Each group is unique and dynamic in its own right with its own set of social, economic and environmental characteristics. The ten village groups are designed to recognise the diversity of local needs and values that exist across the City. The figure (right) shows the location of each of the Villages within the City of Sydney boundaries.

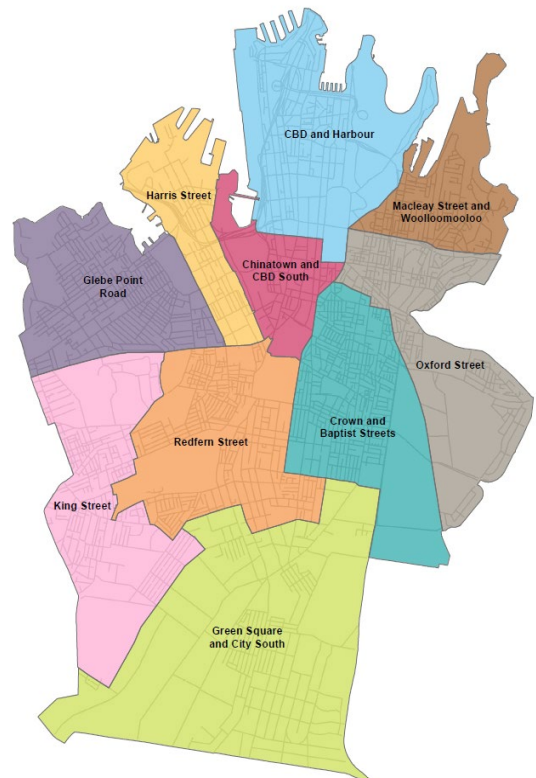


Figure 1. City of Sydney villages



The City of Sydney Local Government Area (LGA) covers an area of 26.15km<sup>2</sup>, and comprises Central Sydney and the suburbs of The Rocks, Millers Point, Barangaroo, Ultimo, Pyrmont, Surry Hills, Woolloomooloo, Kings Cross, Elizabeth Bay, Rushcutters Bay, Darlinghurst, Chippendale, Darlington, Camperdown, Forest Lodge, Glebe, Alexandria, Beaconsfield, Centennial Park, Erskineville, Newtown, Redfern, Rosebery, Waterloo, and Zetland.

The 2022 FES collected data from 25,677 sites in the City, including 21,618 business premises. Business premises are only counted if they use floor space within the city, and they employ workers on site. The Survey excludes construction workers (on-site), home-based businesses, and shelf-companies. The total internal floor space surveyed was 38,185,896m<sup>2</sup>, an increase of 5.7% from the previous Survey. A further 13,496,286m<sup>2</sup> of external area (including vacant land, parks, backyards, courtyards and terraces, etc.) was also collected. Lifts, stairs, escalators, external walls, and voids were collected but are not included in the floor space totals.

Figure 2 below shows the extent of the City of Sydney LGA, looking south-eastwards. There are two predominant business areas in the LGA, the major one being the Central Business District (CBD) where many of the City's high-rise towers are located, and the other in the former industrial and logistics centre around Alexandria, which is slowly transforming to high-tech industrial and commercial uses. More than 80% of the buildings in the City contain residences, with most of these buildings being low-rise terrace housing with predominantly single dwellings.



**Figure 2. City of Sydney looking south-east**

In 2007, the Australian Bureau of Statistics (ABS) Estimated Resident Population (ERP) stated that there were 169,056 residents living in the City of Sydney local area. By 2012, the ERP for the City had risen to 189,543, an increase of 12.3% over five years. In 2017, the ERP was 227,997, a five-year increase of 38,454 (20.3%), and a ten-year increase of 58,941 (34.9%).

Between 2017 and 2022 there was a net decrease in the ERP driven by the impacts of the Covid-19 pandemic on certain components of the city's resident population. Almost all international students left the city and were not replaced, whilst other cohorts moved to other parts of the country. The ERP in 2022 was 218,275, a five-year decrease of 9,722 (-4.3%), and a ten-year increase of 28,732 (15.2%).

The latest ERP (June 2023) was 231,086.

Total jobs in the City of Sydney increased from 385,421 in 2007, to 435,769 in 2012, to 501,785 in 2017, and to 519,839 in 2022. The proportion of full-time jobs (as a proportion of all jobs) decreased from 85.6% in 2017 to 80.5% in 2022. Nearly 1 in 5 jobs in the city are now part-time or casual.

There was an 8.1% decline in the number of business establishments between 2017 and 2022, a net decrease of 1,893 businesses. Over the same period, the average number of workers per business increased from 21.3 to 24.0. The average floor area per business increased from 709m<sup>2</sup> to 770m<sup>2</sup> per establishment.

The number of internal tenant parking spaces in the City increased by 8,303 (7.6%) overall between 2017 and 2022, whilst external parking decreased by 4,851 spaces (-13.7%).

Between 2017 and 2022 there was a 10.1% increase in the number of hotel rooms (20,372 to 22,435), a 5.7% increase in serviced apartments (5,800 to 6,131), and a 14.4% decrease in the number of backpacker beds (7,719 to 6,639).

The key totals for the 2007 to 2022 Surveys are shown in Table 1 below.

**Table 1. Key totals for City of Sydney local area**

| Category                              | 2007       | 2012       | 2017       | 2022       |
|---------------------------------------|------------|------------|------------|------------|
| General                               |            |            |            |            |
| Buildings surveyed                    | 26,151     | 26,177     | 26,203     | 26,322     |
| Businesses surveyed                   | 19,571     | 21,626     | 23,511     | 21,618     |
| Spaces surveyed                       | 625,846    | 697,248    | 876,294    | 926,198    |
| Floor area                            |            |            |            |            |
| Internal floor area (m <sup>2</sup> ) | 32,628,403 | 33,662,992 | 36,140,723 | 38,185,896 |
| External floor area (m <sup>2</sup> ) | 13,107,808 | 13,289,722 | 13,831,563 | 13,496,286 |
| Total floor area (m <sup>2</sup> )    | 45,736,211 | 46,952,714 | 49,972,286 | 51,682,182 |
| Employment                            |            |            |            |            |
| Full-time employment                  | 328,018    | 363,941    | 429,527    | 418,726    |
| Part-time employment                  | 57,403     | 71,828     | 72,258     | 101,113    |
| Total employment                      | 385,421    | 435,769    | 501,785    | 519,839    |
| % of full-time employment             | 85.1%      | 83.5%      | 85.6%      | 80.5%      |
| Tenant parking                        |            |            |            |            |
| Internal parking spaces               | 85,056     | 93,035     | 108,910    | 117,213    |
| External (on-site) parking spaces     | 36,572     | 36,825     | 35,315     | 30,464     |
| Total parking spaces                  | 121,628    | 129,860    | 144,225    | 147,677    |
| Visitor accommodation                 |            |            |            |            |
| Hotel accommodation (rooms)           | 18,330     | 20,477     | 20,372     | 22,435     |
| Serviced apartments (units)           | 3,814      | 4,473      | 5,800      | 6,131      |
| Backpacker accommodation (beds)       | 3,875      | 6,251      | 7,719      | 6,639      |

Extended data tables can be found at the following location.

<https://www.cityofsydney.nsw.gov.au/research-reports/floor-space-employment-survey-2022>

Spatial data can be found at the following location.

<https://data.cityofsydney.nsw.gov.au/>

# Industry sectors

The FES codes each business establishment based on a modified Australian and New Zealand Standard Industrial Classification (ANZSIC) – 2006. ANZSIC classifies the primary activity of a business into 16 ‘Divisions’ and then into 506 4-digit ‘Industries’. The Survey has further subdivided these into 654 unique business uses. This allows for more detailed analysis of business, employment and floor space uses.

The 654 business uses (industries) have been re-categorised into a ‘City-Based Industry Sector’ Classification which better reflects the mix of uses within the business community of city centres such as the City of Sydney. There are nineteen ‘business’ related industry divisions, and a further five ‘non-business’ related industry divisions within the City-Based Industry Sector Classification. The reclassification allows the analysis of industry groups such as *Creative industries*, *ICT*, and *Tourist, cultural and leisure*.

In terms of business numbers, the predominant industry sectors in the City of Sydney are *Professional and business services*, *Retail and personal services* and *Food and drink*, with 3,565, 3,526 and 3,231 businesses respectively. Between them they cover 47.7% of the businesses in the city.

In terms of jobs, the top three industry sectors are *Finance and financial services*, *Professional and business services* and *ICT*, with 125,002, 94,157 and 38,895 workers respectively, accounting for 49.8% of all employment in the City. The City has a diversified industry mix, with thirteen industry sectors employing more than 10,000 workers and eight sectors employing more than 25,000 workers.

The *Tourist, cultural and leisure* industry sector has the highest amount of floor area in the city, with 3,087,307m<sup>2</sup> (18.5%). The next highest sectors were *Finance and financial services*, and *Professional and business services* with 1,702,204m<sup>2</sup> (10.2%) and 1,640,041m<sup>2</sup> (9.8%) respectively.

The average workspace ratio for the city in 2022 was 32.1m<sup>2</sup> per worker.

Tables 2-5, 6-9, and 10-13 show the counts, proportions, change, and percentage change for business numbers, jobs, and floor area by industry sectors (respectively) for all four Surveys from 2007 to 2022.

Figures 3-5 show the proportions of the top six industry sectors for business count, total jobs, and occupied business floor area for each Survey from 2007 to 2022.

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## Business establishments

Between 2017 and 2022 the number of businesses in the City of Sydney decreased by 8.1%, from 23,511 to 21,618 establishments. This was a net reduction of 1,893 businesses. The number of businesses in 2022 is equivalent to 2012 (21,626 establishments). Just over 9,000 businesses closed or moved between the last two Surveys. There were 7,151 businesses surveyed in 2022 that had opened in the previous five years. A further 14,467 businesses from 2017 survived through Covid-19 and were still operating in the same location in 2022 (61.5% of 2017 establishments).

Tables 2 to 5 (following pages) show the count of businesses, the proportion of businesses, the change in number of businesses, and the proportional change in businesses for all industry sectors from 2007 to 2022 by five-year increments.

Almost all sectors saw a net decrease in business numbers between 2017 and 2022. The largest sectoral decrease in the past five years occurred in the *Professional and business services* sector, with 477 fewer business establishments, followed by *Retail and personal services* with 307 fewer businesses, and with *Food and drink* 220 fewer establishments than in 2022.

Eight of the ten villages had decreases in the number of businesses in their area, with CBD and Harbour and Chinatown and CBD South having the greatest net decreases losing 774 and 535 establishments respectively, whilst Harris Street had the highest percentage decline with -17.4%.

The *Community* industry sector was one of the few sectors to rise in businesses numbers between 2017 and 2022, reflecting the need for continuation of these services (such as emergency services, schools) regardless of the impacts of a pandemic.

The *Government*, *Manufacturing*, and *Transport and logistics* sectors all had three consecutive periods of decline in business establishments between 2007 and 2022.

Figure 3 shows the percentage share of business numbers of the top six city-based industry sectors from 2007 and 2022. *Professional and business services* is the sector with the greatest number of establishments in 2022 with 17% of all businesses.

The *Professional and business services*, *Food and drink*, and *Retail and personal services* sectors retained their positions in the top three for business numbers in each Survey since 2007, albeit changing the order over time. The top six industry sectors were the same in all Surveys. Overall, the top six industry sectors maintained their combined share by at 71% for the past five years.



**Table 2. Count of businesses by city-based industry sector, 2007-2022**

| City-based industry sector         | 2007          | 2012          | 2017          | 2022          |
|------------------------------------|---------------|---------------|---------------|---------------|
| Community                          | 171           | 194           | 200           | 208           |
| Creative industries                | 1,794         | 1,872         | 1,855         | 1,679         |
| Finance and financial services     | 1,678         | 1,681         | 2,139         | 1,977         |
| Food and drink                     | 2,750         | 3,289         | 3,746         | 3,526         |
| Government                         | 354           | 341           | 331           | 288           |
| Health                             | 822           | 1,023         | 1,106         | 1,095         |
| Higher education and research      | 579           | 682           | 862           | 815           |
| ICT                                | 1,024         | 1,018         | 1,047         | 931           |
| Life science (bio-tech)            | 211           | 211           | 241           | 224           |
| Manufacturing                      | 377           | 345           | 260           | 224           |
| Motor vehicle                      | 241           | 251           | 209           | 198           |
| Natural resource-based industries  | 90            | 54            | 49            | 51            |
| Other                              | 15            | 9             | 3             | 0             |
| Professional and business services | 2,832         | 3,583         | 4,042         | 3,565         |
| Property development and operation | 634           | 645           | 966           | 924           |
| Retail and personal services       | 3,109         | 3,399         | 3,538         | 3,231         |
| Social capital                     | 558           | 665           | 645           | 632           |
| Tourist, cultural and leisure      | 1,154         | 1,292         | 1,430         | 1,298         |
| Transport and logistics            | 1,127         | 1,039         | 796           | 700           |
| Utilities                          | 51            | 33            | 46            | 52            |
| <b>Total</b>                       | <b>19,571</b> | <b>21,626</b> | <b>23,511</b> | <b>21,618</b> |

**Table 3. Proportion of businesses by city-based industry sector, 2007-2022**

| City-based industry sector         | 2007%         | 2012%         | 2017%         | 2022%         |
|------------------------------------|---------------|---------------|---------------|---------------|
| Community                          | 0.9%          | 0.9%          | 0.9%          | 1.0%          |
| Creative industries                | 9.2%          | 8.7%          | 7.9%          | 7.8%          |
| Finance and financial services     | 8.6%          | 7.8%          | 9.1%          | 9.1%          |
| Food and drink                     | 14.1%         | 15.2%         | 15.9%         | 16.3%         |
| Government                         | 1.8%          | 1.6%          | 1.4%          | 1.3%          |
| Health                             | 4.2%          | 4.7%          | 4.7%          | 5.1%          |
| Higher education and research      | 3.0%          | 3.2%          | 3.7%          | 3.8%          |
| ICT                                | 5.2%          | 4.7%          | 4.5%          | 4.3%          |
| Life science (bio-tech)            | 1.1%          | 1.0%          | 1.0%          | 1.0%          |
| Manufacturing                      | 1.9%          | 1.6%          | 1.1%          | 1.0%          |
| Motor vehicle                      | 1.2%          | 1.2%          | 0.9%          | 0.9%          |
| Natural resource-based industries  | 0.5%          | 0.2%          | 0.2%          | 0.2%          |
| Other                              | 0.1%          | 0.0%          | 0.0%          | 0.0%          |
| Professional and business services | 14.5%         | 16.6%         | 17.2%         | 16.5%         |
| Property development and operation | 3.2%          | 3.0%          | 4.1%          | 4.3%          |
| Retail and personal services       | 15.9%         | 15.7%         | 15.0%         | 14.9%         |
| Social capital                     | 2.9%          | 3.1%          | 2.7%          | 2.9%          |
| Tourist, cultural and leisure      | 5.9%          | 6.0%          | 6.1%          | 6.0%          |
| Transport and logistics            | 5.8%          | 4.8%          | 3.4%          | 3.2%          |
| Utilities                          | 0.3%          | 0.2%          | 0.2%          | 0.2%          |
| <b>Total</b>                       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> |

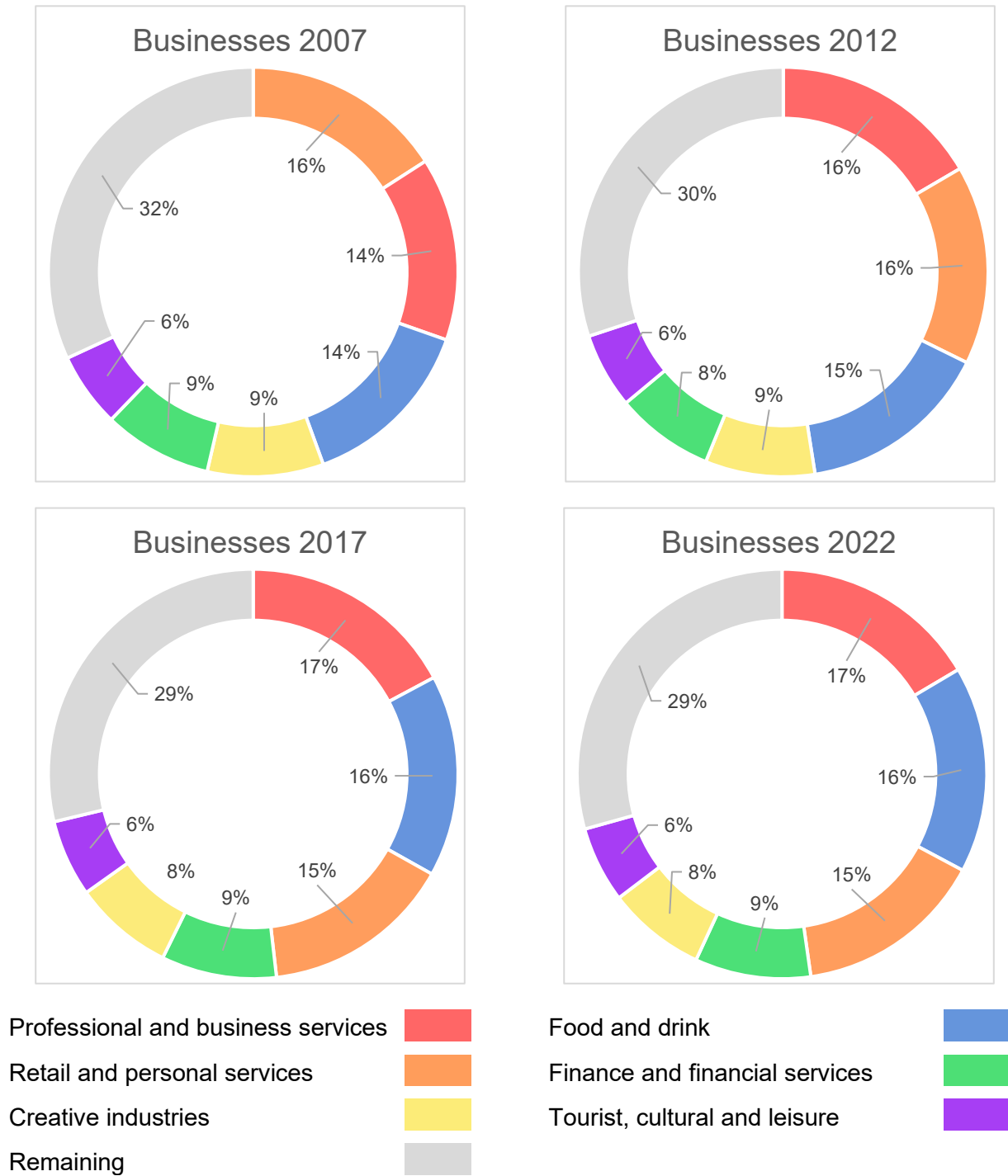
**Table 4. Change in count of businesses by city-based industry sector, by five-year periods, 2007-2022**

| City-based industry sector         | 2007-12      | 2012-17      | 2017-22       |
|------------------------------------|--------------|--------------|---------------|
| Community                          | 23           | 6            | 8             |
| Creative industries                | 78           | -17          | -176          |
| Finance and financial services     | 3            | 458          | -162          |
| Food and drink                     | 539          | 457          | -220          |
| Government                         | -13          | -10          | -43           |
| Health                             | 201          | 83           | -11           |
| Higher education and research      | 103          | 180          | -47           |
| ICT                                | -6           | 29           | -116          |
| Life science (bio-tech)            | 0            | 30           | -17           |
| Manufacturing                      | -32          | -85          | -36           |
| Motor vehicle                      | 10           | -42          | -11           |
| Natural resource-based industries  | -36          | -5           | 2             |
| Other                              | -6           | -6           | -3            |
| Professional and business services | 751          | 459          | -477          |
| Property development and operation | 11           | 321          | -42           |
| Retail and personal services       | 290          | 139          | -307          |
| Social capital                     | 107          | -20          | -13           |
| Tourist, cultural and leisure      | 138          | 138          | -132          |
| Transport and logistics            | -88          | -243         | -96           |
| Utilities                          | -18          | 13           | 6             |
| <b>Total</b>                       | <b>2,055</b> | <b>1,885</b> | <b>-1,893</b> |

**Table 5. Proportional change in count of businesses by city-based industry sector, by five-year periods, 2007-2022**

| City-based industry sector         | %Δ 2007-12   | %Δ 2012-17  | %Δ 2017-22   |
|------------------------------------|--------------|-------------|--------------|
| Community                          | 13.5%        | 3.1%        | 4.0%         |
| Creative industries                | 4.3%         | -0.9%       | -9.5%        |
| Finance and financial services     | 0.2%         | 27.2%       | -7.6%        |
| Food and drink                     | 19.6%        | 13.9%       | -5.9%        |
| Government                         | -3.7%        | -2.9%       | -13.0%       |
| Health                             | 24.5%        | 8.1%        | -1.0%        |
| Higher education and research      | 17.8%        | 26.4%       | -5.5%        |
| ICT                                | -0.6%        | 2.8%        | -11.1%       |
| Life science (bio-tech)            | 0.0%         | 14.2%       | -7.1%        |
| Manufacturing                      | -8.5%        | -24.6%      | -13.8%       |
| Motor vehicle                      | 4.1%         | -16.7%      | -5.3%        |
| Natural resource-based industries  | -40.0%       | -9.3%       | 4.1%         |
| Other                              | -40.0%       | -66.7%      | -100.0%      |
| Professional and business services | 26.5%        | 12.8%       | -11.8%       |
| Property development and operation | 1.7%         | 49.8%       | -4.3%        |
| Retail and personal services       | 9.3%         | 4.1%        | -8.7%        |
| Social capital                     | 19.2%        | -3.0%       | -2.0%        |
| Tourist, cultural and leisure      | 12.0%        | 10.7%       | -9.2%        |
| Transport and logistics            | -7.8%        | -23.4%      | -12.1%       |
| Utilities                          | -35.3%       | 39.4%       | 13.0%        |
| <b>Total</b>                       | <b>10.5%</b> | <b>8.7%</b> | <b>-8.1%</b> |

Figure 3. Proportion of businesses by top six industry sectors, 2007-2022





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## Jobs and employment

The City of Sydney contains the main concentration of employment within Metropolitan Sydney, with approximately 22% of all employment located in the LGA. Most transport networks run through the city, making for easy access to jobs for a large proportion of Sydney residents. The city has a diverse range of employment opportunities, and a wide variety of retail and entertainment activities to entice workers to stay and spend in the city, further supporting additional economic activity.

Between 2017 and 2022, the workforce of the City grew by 3.6%, rising from 501,786 to 519,839. These additional 18,053 jobs comprised a net loss of 10,801 full-time jobs, and a net gain of 28,855 part-time jobs. Over the coming years, significant development of new commercial space in and around the City will provide enough space for further jobs growth.

Tables 6 to 9 (following pages) show the total jobs, the proportion of jobs, the change in total jobs, and the proportional change in jobs for all industry sectors from 2007 to 2022 by five-year increments.

More than 42% of the workers in the City are employed in just two industry sectors: *Finance and financial services* (24.0%) and *Professional and business services* (18.1%). The former grew by 9,309 jobs between 2017 and 2022, whilst the latter declined by 5,247 jobs over the same period. Prior to the Covid pandemic, *Professional and business services* was on track to becoming the largest employment sector in the city.

Thirteen of the nineteen business sectors experienced employment growth despite almost across the board declines in business establishment numbers. The *Government* (-4,953 jobs) and *Transport and logistics* (-3,681 jobs) were other sectors with significant jobs decreases between 2017 and 2022. The job losses for the former were concentrated in Chinatown and CBD and Oxford Street villages, with major NSW Government departments relocating to Parramatta.

The spatial distribution of change in jobs numbers between 2017 and 2022 was very uneven. Chinatown and CBD South (-6,498 jobs) and King Street (-1,687 jobs) has significant losses. Redfern Street grew by 7,243 jobs (11.0%) which included 8,035 jobs in *Finance and financial services* alone. *Creative industries* lost jobs in five village area but gained jobs in the other five for a net loss of 647 jobs. The *ICT* sector gained 5,759 jobs in CBD and harbour and lost 1,858 in Chinatown and CBD South.

Thirteen of the nineteen business sectors in the City employ more than 10,000 workers. In eleven of these sectors, the highest proportions of jobs are in the CBD and Harbour. Of the other two sectors, Harris Street has the highest proportion of *Higher education and research* jobs, whilst Green Square and City South Village has the highest proportion of *Transport and logistics* jobs.

In 2022, businesses in the City of Sydney employed 24.0 workers on average across all sectors, increasing from 21.3 in 2017. The *Retail and personal services* (7.7) and *Food and drink* (9.2) sectors both average less than 10 workers per business. Both sectors have increased the average number of workers per establishment since 2017.

Figure 3 shows the percentage share of total jobs for the top six city-based industry sectors from 2007 and 2022. *Professional and business services* is the sector with the greatest number of establishments in 2022 with 17% of all businesses.

The top two industry sectors by share (*Finance and financial services* and *Professional and business services*) have a combined percentage of jobs of 42.3%. Of the remaining four sectors in the top six by employment, *Creative industries* has fallen from third place in 2007 (8.4%) and 2012 (8.1%), to fifth place in 2017 (6.6%), and to sixth place in 2022 (6.2%). *ICT* has retained third place, increasing its share to 7.5%; *Tourist, Culture and Leisure* has risen to fourth place, increasing share to 6.4%. The combined percentage of the industries outside of the top six rose 0.2%.

## Table 6. Total jobs by city-based industry sector, 2007-2022

| City-based industry sector         | 2007           | 2012           | 2017           | 2022           |
|------------------------------------|----------------|----------------|----------------|----------------|
| Community                          | 5,518          | 5,764          | 5,686          | 6,997          |
| Creative industries                | 32,448         | 35,017         | 33,027         | 32,380         |
| Finance and financial services     | 90,964         | 99,688         | 115,693        | 125,002        |
| Food and drink                     | 21,220         | 27,958         | 26,586         | 32,396         |
| Government                         | 31,463         | 25,875         | 34,125         | 29,172         |
| Health                             | 10,613         | 15,046         | 15,754         | 17,360         |
| Higher education and research      | 20,014         | 24,538         | 28,692         | 27,825         |
| ICT                                | 25,857         | 26,962         | 34,157         | 38,895         |
| Life science (bio-tech)            | 2,513          | 2,031          | 2,777          | 3,091          |
| Manufacturing                      | 6,151          | 5,332          | 3,439          | 3,093          |
| Motor vehicle                      | 2,318          | 2,740          | 2,204          | 2,371          |
| Natural resource-based industries  | 1,173          | 852            | 982            | 843            |
| Non-private households             | 311            | 286            | 340            | 377            |
| Other                              | 523            | 1,207          | 609            | 912            |
| Private households                 | 145            | 193            | 137            | 191            |
| Professional and business services | 55,214         | 78,122         | 99,404         | 94,157         |
| Property development and operation | 9,483          | 9,298          | 20,703         | 20,704         |
| Retail and personal services       | 18,977         | 21,368         | 20,702         | 24,859         |
| Social capital                     | 6,980          | 8,163          | 10,011         | 10,888         |
| Tourist, cultural and leisure      | 22,466         | 26,278         | 28,373         | 33,415         |
| Transport and logistics            | 17,413         | 16,731         | 13,789         | 10,108         |
| Utilities                          | 3,657          | 2,320          | 4,596          | 4,803          |
| <b>Total</b>                       | <b>385,421</b> | <b>435,769</b> | <b>501,786</b> | <b>519,839</b> |

**Table 7. Proportion of total jobs by city-based industry sector, 2007-2022**

| City-based industry sector         | 2007%         | 2012%         | 2017%         | 2022%         |
|------------------------------------|---------------|---------------|---------------|---------------|
| Community                          | 1.4%          | 1.3%          | 1.1%          | 1.3%          |
| Creative industries                | 8.4%          | 8.0%          | 6.6%          | 6.2%          |
| Finance and financial services     | 23.6%         | 22.9%         | 23.1%         | 24.0%         |
| Food and drink                     | 5.5%          | 6.4%          | 5.3%          | 6.2%          |
| Government                         | 8.2%          | 5.9%          | 6.8%          | 5.6%          |
| Health                             | 2.8%          | 3.5%          | 3.1%          | 3.3%          |
| Higher education and research      | 5.2%          | 5.6%          | 5.7%          | 5.4%          |
| ICT                                | 6.7%          | 6.2%          | 6.8%          | 7.5%          |
| Life science (bio-tech)            | 0.7%          | 0.5%          | 0.6%          | 0.6%          |
| Manufacturing                      | 1.6%          | 1.2%          | 0.7%          | 0.6%          |
| Motor vehicle                      | 0.6%          | 0.6%          | 0.4%          | 0.5%          |
| Natural resource-based industries  | 0.3%          | 0.2%          | 0.2%          | 0.2%          |
| Non-private households             | 0.1%          | 0.1%          | 0.1%          | 0.1%          |
| Other                              | 0.1%          | 0.3%          | 0.1%          | 0.2%          |
| Private households                 | 0.0%          | 0.0%          | 0.0%          | 0.0%          |
| Professional and business services | 14.3%         | 17.9%         | 19.8%         | 18.1%         |
| Property development and operation | 2.5%          | 2.1%          | 4.1%          | 4.0%          |
| Retail and personal services       | 4.9%          | 4.9%          | 4.1%          | 4.8%          |
| Social capital                     | 1.8%          | 1.9%          | 2.0%          | 2.1%          |
| Tourist, cultural and leisure      | 5.8%          | 6.0%          | 5.7%          | 6.4%          |
| Transport and logistics            | 4.5%          | 3.8%          | 2.7%          | 1.9%          |
| Utilities                          | 0.9%          | 0.5%          | 0.9%          | 0.9%          |
| <b>Total</b>                       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> |

**Table 8. Change in total jobs by city-based industry sector, by five-year periods, 2007-2022**

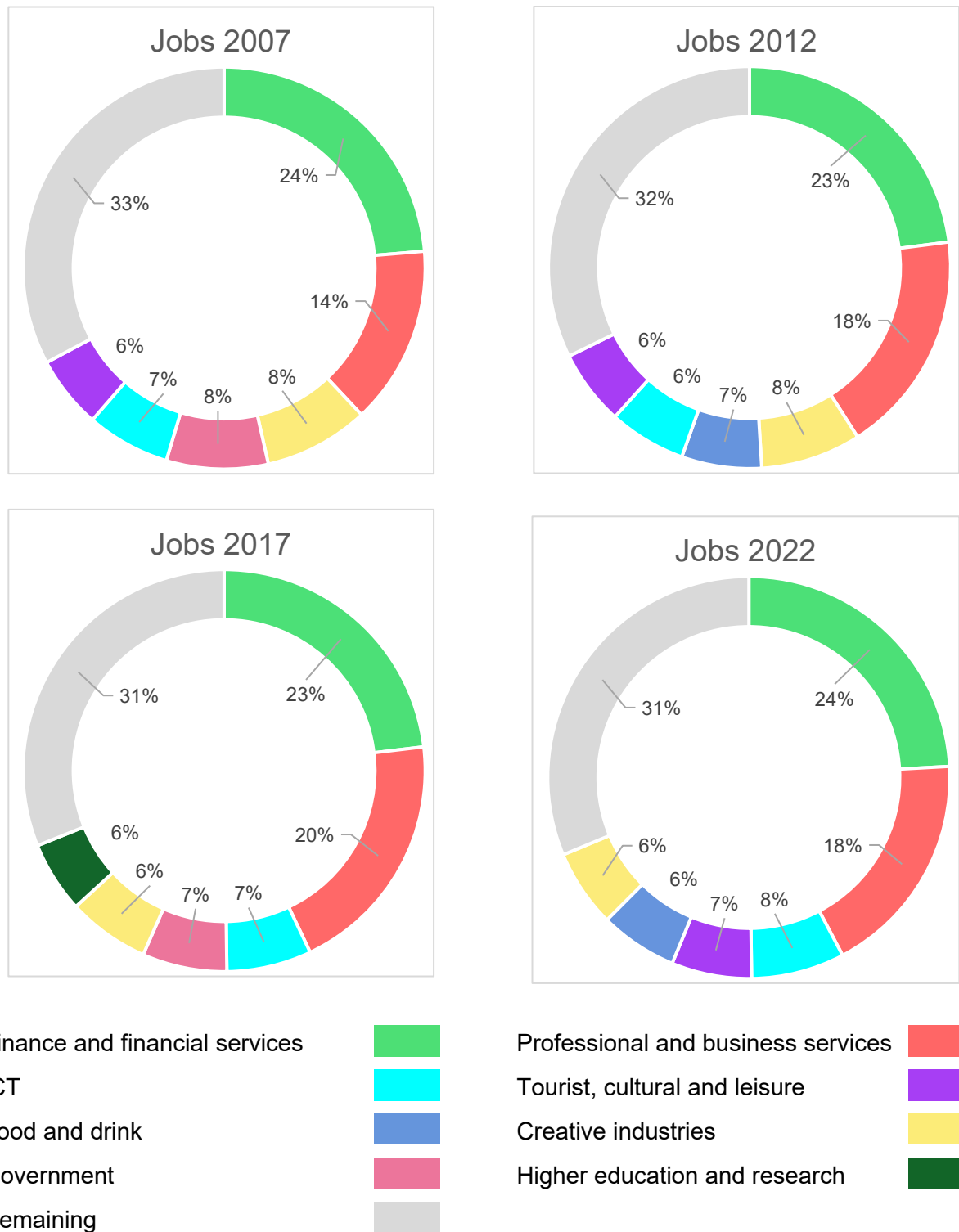
| City-based industry sector         | 2007-12       | 2012-17       | 2017-22       |
|------------------------------------|---------------|---------------|---------------|
| Community                          | 246           | -78           | 1,311         |
| Creative industries                | 2,569         | -1,990        | -647          |
| Finance and financial services     | 8,724         | 16,005        | 9,309         |
| Food and drink                     | 6,738         | -1,372        | 5,810         |
| Government                         | -5,588        | 8,250         | -4,953        |
| Health                             | 4,433         | 708           | 1,606         |
| Higher education and research      | 4,524         | 4,154         | -867          |
| ICT                                | 1,105         | 7,195         | 4,738         |
| Life science (bio-tech)            | -482          | 746           | 314           |
| Manufacturing                      | -819          | -1,893        | -346          |
| Motor vehicle                      | 422           | -536          | 167           |
| Natural resource-based industries  | -321          | 130           | -139          |
| Non-private households             | -25           | 54            | 37            |
| Other                              | 684           | -598          | 303           |
| Private households                 | 48            | -56           | 54            |
| Professional and business services | 22,908        | 21,282        | -5,247        |
| Property development and operation | -185          | 11,405        | 1             |
| Retail and personal services       | 2,391         | -666          | 4,157         |
| Social capital                     | 1,183         | 1,848         | 877           |
| Tourist, cultural and leisure      | 3,812         | 2,095         | 5,042         |
| Transport and logistics            | -682          | -2,942        | -3681         |
| Utilities                          | -1337         | 2,276         | 207           |
| <b>Total</b>                       | <b>50,348</b> | <b>66,017</b> | <b>18,053</b> |

**Table 9. Proportional change in total jobs by city-based industry sector, by five-year periods, 2007-2022**

| City-based industry sector         | %Δ 2007-12   | %Δ 2012-17   | %Δ 2017-22  |
|------------------------------------|--------------|--------------|-------------|
| Community                          | 4.5%         | -1.4%        | 23.1%       |
| Creative industries                | 7.9%         | -5.7%        | -2.0%       |
| Finance and financial services     | 9.6%         | 16.1%        | 8.0%        |
| Food and drink                     | 31.8%        | -4.9%        | 21.9%       |
| Government                         | -17.8%       | 31.9%        | -14.5%      |
| Health                             | 41.8%        | 4.7%         | 10.2%       |
| Higher education and research      | 22.6%        | 16.9%        | -3.0%       |
| ICT                                | 4.3%         | 26.7%        | 13.9%       |
| Life science (bio-tech)            | -19.2%       | 36.7%        | 11.3%       |
| Manufacturing                      | -13.3%       | -35.5%       | -10.1%      |
| Motor vehicle                      | 18.2%        | -19.6%       | 7.6%        |
| Natural resource-based industries  | -27.4%       | 15.3%        | -14.2%      |
| Non-private households             | -8.0%        | 18.9%        | 10.9%       |
| Other                              | 130.8%       | -49.5%       | 49.8%       |
| Private households                 | 33.1%        | -29.0%       | 39.4%       |
| Professional and business services | 41.5%        | 27.2%        | -5.3%       |
| Property development and operation | -2.0%        | 122.7%       | 0.0%        |
| Retail and personal services       | 12.6%        | -3.1%        | 20.1%       |
| Social capital                     | 16.9%        | 22.6%        | 8.8%        |
| Tourist, cultural and leisure      | 17.0%        | 8.0%         | 17.8%       |
| Transport and logistics            | -3.9%        | -17.6%       | -26.7%      |
| Utilities                          | -36.6%       | 98.1%        | 4.5%        |
| <b>Total</b>                       | <b>13.1%</b> | <b>15.1%</b> | <b>3.6%</b> |



Figure 4. Proportion of total jobs by top six industry sectors, 2007-2022



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## Internal floor area

The 2022 Survey measured nearly 38.2 million square metres of internal floor space in the City of Sydney local area. Additionally, data was collected on 13.5 million square metres of external space, including parks, car parks, terraces and balconies. The measurements for the floor space uses were collected by creating spatial entities for each non-contiguous space, and attributing relevant attribute data such as employment numbers, capacity and vacancy to each. Every individual space is held in a Geographic Information System (GIS) database and is related to the business that uses it. The GIS calculates the areas automatically and allows 2-D and 3-D presentation and analysis of the data.

Tables 10 to 13 (following pages) show the total internal floor area, the proportion of internal floor area, the change in total internal floor area, and the proportional change in internal floor area for all industry sectors from 2007 to 2022 by five-year increments.

Occupied businesses decreased by 3,500m<sup>2</sup> (-0.02%) between 2017 and 2022 (compared to business count decline of 8.1% and employment growth of 3.6%). Total internal floor area (including residential, vacant and other spaces) rose by 5.7% overall. In terms of occupied business floor area, the *Tourist, cultural and leisure* sector occupies the largest amount of floor space in the city, with 3,087,307m<sup>2</sup> (18.5%). This is more than 1.3 million square metres more than the industry sector with next largest floor space area.

The *Tourist, cultural and leisure* sector had the highest increase in floor area used, with an additional 175,797m<sup>2</sup> (an increase of 6.0%), whilst the *Professional and business services*, *Government* and *Creative industries* sectors had the greatest declines in floor area, with losses of 91,596m<sup>2</sup> (-5.3%), 64,998 (-6.5%), and 63,992m<sup>2</sup> (-5.3%) respectively.

Total business floor area increased by 572,394m<sup>2</sup> between 2017 and 2022. This included a slight decrease in occupied business floor area (mentioned above) and an increase of 575,833m<sup>2</sup> of vacant business floor area. This was a 49.4% increase in vacant space since 2017 and is the biggest indicator of the impacts of Covid-19 on the city's economy. The vacancy rate in the local area went from 6.5% in 2017 up to 9.5% in 2022. Vacant business floor area in Chinatown and CBD South increased by 168.7%, whilst Glebe Point Road increased by 133.6%.

As of 2022, there was nearly 14 million square metres of floor area in the *Private households* sector, an increase of 1.24 million m<sup>2</sup> between the last two Surveys. The increase in floor space for *Private households* was greater than the combined increase for all other sectors.

Figure 4 shows the percentage share of total internal floor area for the top six city-based industry sectors from 2007 and 2022. The *Tourist, culture and leisure* sector's percentage share increased by 1.0% over the last five years and maintained the largest share of occupied business floor area. and *Finance and financial services* (10.2%) and *Higher education and research* (8.5%) both increased their percentage share, whilst *Professional and business services* (9.8%) and *Transport and logistics* (9.0%) both decreased their share. *Creative industries* decreased its proportional share Survey on Survey falling from fourth to sixth largest sector over fifteen years (8.4% in 2007 to 6.9% in 2022).

The average business is approximately 770m<sup>2</sup> in size (for all space uses) across all sectors. This ranges from an average low space use of 189m<sup>2</sup> per establishment for *Food and drink*, up to an average of 3,989m<sup>2</sup> of floor space use per establishment for the *Utilities* sector. The average floor area per business has increased by 61 square metres per establishment since 2017.

**Table 10 Total internal floor area by city-based industry sector, 2007-2022**

| City-based industry sector           | 2007              | 2012              | 2017              | 2022              |
|--------------------------------------|-------------------|-------------------|-------------------|-------------------|
| Community                            | 364,790           | 381,954           | 406,505           | 479,030           |
| Creative industries                  | 1,289,090         | 1,321,879         | 1,212,900         | 1,148,908         |
| Finance and financial services       | 1,635,739         | 1,722,377         | 1,687,947         | 1,702,204         |
| Food and drink                       | 545,742           | 622,901           | 699,870           | 667,774           |
| Government                           | 960,885           | 910,273           | 993,535           | 928,537           |
| Health                               | 528,911           | 582,816           | 658,894           | 665,340           |
| Higher education and research        | 1,024,223         | 1,162,774         | 1,374,245         | 1,422,853         |
| ICT                                  | 803,436           | 736,904           | 809,011           | 865,730           |
| Life science (bio-tech)              | 84,163            | 72,312            | 76,494            | 70,799            |
| Manufacturing                        | 515,619           | 327,829           | 185,614           | 159,211           |
| Motor vehicle                        | 244,818           | 278,446           | 258,434           | 291,166           |
| Natural resource-based industries    | 30,964            | 20,035            | 16,434            | 14,048            |
| Professional and business services   | 1,273,817         | 1,636,907         | 1,731,637         | 1,640,041         |
| Property development and operation   | 260,088           | 269,889           | 415,885           | 388,900           |
| Retail and personal services         | 839,239           | 945,253           | 1,012,799         | 955,931           |
| Social capital                       | 381,767           | 421,093           | 444,265           | 455,165           |
| Tourist, cultural and leisure        | 2,471,649         | 2,566,812         | 2,911,511         | 3,087,307         |
| Transport and logistics              | 1,957,005         | 1,814,748         | 1,555,554         | 1,502,228         |
| Utilities                            | 190,402           | 139,100           | 204,494           | 207,414           |
| <b>Occupied business floor area</b>  | <b>15,402,348</b> | <b>15,934,303</b> | <b>16,656,026</b> | <b>16,652,587</b> |
| Vacant business floor area           | 1,813,020         | 1,627,400         | 1,165,825         | 1,741,657         |
| Occupied business floor space        | 15,402,348        | 15,934,303        | 16,656,026        | 16,652,587        |
| <b>Total business floor area</b>     | <b>17,215,368</b> | <b>17,561,703</b> | <b>17,821,850</b> | <b>18,394,244</b> |
| Private households                   | 10,443,285        | 10,993,826        | 12,726,014        | 13,963,662        |
| Non-private households               | 183,657           | 242,064           | 439,029           | 473,078           |
| Other                                | 4,101,369         | 4,479,326         | 4,693,824         | 4,878,354         |
| Redevelopment                        | 684,724           | 386,786           | 460,006           | 463,510           |
| <b>Total non-business floor area</b> | <b>15,413,036</b> | <b>16,102,002</b> | <b>18,318,873</b> | <b>19,778,605</b> |
| <b>Total business floor area</b>     | <b>17,215,368</b> | <b>17,561,703</b> | <b>17,821,850</b> | <b>18,394,244</b> |
| <b>Total internal floor area</b>     | <b>32,628,404</b> | <b>33,663,705</b> | <b>36,140,723</b> | <b>38,172,848</b> |

**Table 11. Proportion of internal floor area by city-based industry sector, 2007-2022**

| City-based industry sector           | 2007          | 2012          | 2017          | 2022          |
|--------------------------------------|---------------|---------------|---------------|---------------|
| Community                            | 2.4%          | 2.4%          | 2.4%          | 2.9%          |
| Creative industries                  | 8.4%          | 8.3%          | 7.3%          | 6.9%          |
| Finance and financial services       | 10.6%         | 10.8%         | 10.1%         | 10.2%         |
| Food and drink                       | 3.5%          | 3.9%          | 4.2%          | 4.0%          |
| Government                           | 6.2%          | 5.7%          | 6.0%          | 5.6%          |
| Health                               | 3.4%          | 3.7%          | 4.0%          | 4.0%          |
| Higher education and research        | 6.6%          | 7.3%          | 8.3%          | 8.5%          |
| ICT                                  | 5.2%          | 4.6%          | 4.9%          | 5.2%          |
| Life science (bio-tech)              | 0.5%          | 0.5%          | 0.5%          | 0.4%          |
| Manufacturing                        | 3.3%          | 2.1%          | 1.1%          | 1.0%          |
| Motor vehicle                        | 1.6%          | 1.7%          | 1.6%          | 1.7%          |
| Natural resource-based industries    | 0.2%          | 0.1%          | 0.1%          | 0.1%          |
| Professional and business services   | 8.3%          | 10.3%         | 10.4%         | 9.8%          |
| Property development and operation   | 1.7%          | 1.7%          | 2.5%          | 2.3%          |
| Retail and personal services         | 5.4%          | 5.9%          | 6.1%          | 5.7%          |
| Social capital                       | 2.5%          | 2.6%          | 2.7%          | 2.7%          |
| Tourist, cultural and leisure        | 16.0%         | 16.1%         | 17.5%         | 18.5%         |
| Transport and logistics              | 12.7%         | 11.4%         | 9.3%          | 9.0%          |
| Utilities                            | 1.2%          | 0.9%          | 1.2%          | 1.2%          |
| <b>Occupied business floor area</b>  | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> |
| Vacant business floor area           | 10.5%         | 9.3%          | 6.5%          | 9.5%          |
| Occupied business floor space        | 89.5%         | 90.7%         | 93.5%         | 90.5%         |
| <b>Total business floor area</b>     | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> |
| Private households                   | 32.0%         | 32.7%         | 35.2%         | 36.6%         |
| Non-private households               | 0.6%          | 0.7%          | 1.2%          | 1.2%          |
| Other                                | 12.6%         | 13.3%         | 13.0%         | 12.8%         |
| Redevelopment                        | 2.1%          | 1.1%          | 1.3%          | 1.2%          |
| <b>Total non-business floor area</b> | <b>47.2%</b>  | <b>47.8%</b>  | <b>50.7%</b>  | <b>51.8%</b>  |
| <b>Total business floor area</b>     | <b>52.8%</b>  | <b>52.2%</b>  | <b>49.3%</b>  | <b>48.2%</b>  |
| <b>Total internal floor area</b>     | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> |

**Table 12. Change in internal floor area by city-based industry sector, by five-year periods, 2007-2022**

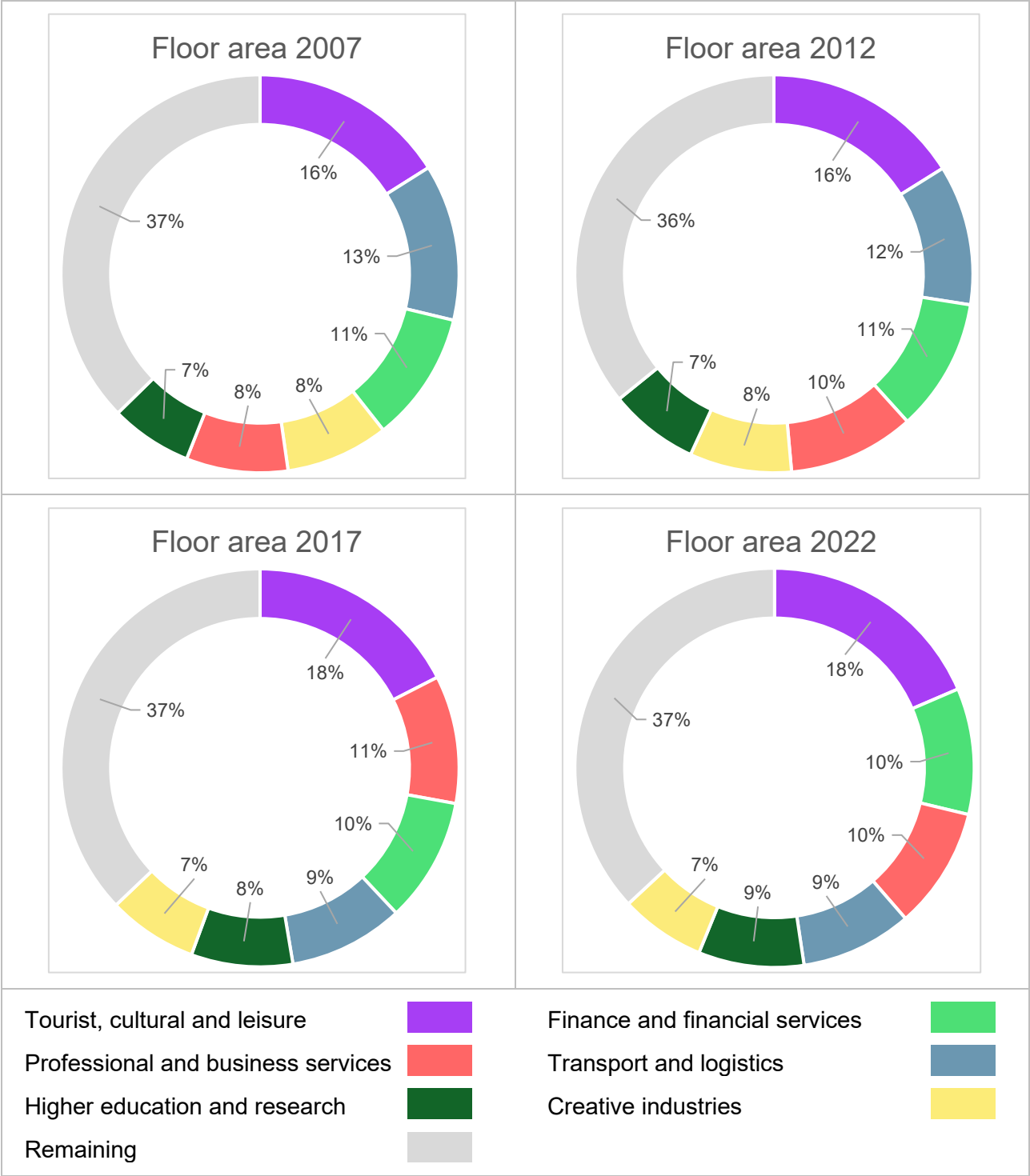
| City-based industry sector           | 2007-12          | 2012-17          | 2017-22          |
|--------------------------------------|------------------|------------------|------------------|
| Community                            | 17,164           | 24,550           | 72,525           |
| Creative industries                  | 32,789           | -108,979         | -63,992          |
| Finance and financial services       | 86,638           | -34,430          | 14,257           |
| Food and drink                       | 77,159           | 76,969           | -32,096          |
| Government                           | -50,612          | 83,261           | -64,998          |
| Health                               | 53,905           | 76,078           | 6,446            |
| Higher education and research        | 138,551          | 211,471          | 48,608           |
| ICT                                  | -66,532          | 72,107           | 56,720           |
| Life science (bio-tech)              | -11,851          | 4,182            | -5,695           |
| Manufacturing                        | -187,791         | -142,215         | -26,403          |
| Motor vehicle                        | 33,629           | -20,013          | 32,732           |
| Natural resource-based industries    | -10,928          | -3,602           | -2,386           |
| Professional and business services   | 363,089          | 94,730           | -91,596          |
| Property development and operation   | 9,801            | 145,996          | -26,985          |
| Retail and personal services         | 106,014          | 67,545           | -56,867          |
| Social capital                       | 39,327           | 23,172           | 10,900           |
| Tourist, cultural and leisure        | 95,163           | 344,699          | 175,797          |
| Transport and logistics              | -142,257         | -259,194         | -53,326          |
| Utilities                            | -51,302          | 65,394           | 2,919            |
| <b>Occupied business floor area</b>  | <b>531,955</b>   | <b>721,722</b>   | <b>-3,439</b>    |
| Vacant business floor area           | -185,619         | -461,576         | 575,833          |
| Occupied business floor space        | 531,955          | 721,722          | -3,439           |
| <b>Total business floor area</b>     | <b>346,336</b>   | <b>260,147</b>   | <b>572,394</b>   |
| Private households                   | 550,540          | 1,732,188        | 1,237,648        |
| Non-private households               | 58,407           | 196,965          | 34,049           |
| Other                                | 377,957          | 214,498          | 184,530          |
| Redevelopment                        | -297,938         | 73,220           | 3,504            |
| <b>Total non-business floor area</b> | <b>688,966</b>   | <b>2,216,871</b> | <b>1,459,732</b> |
| <b>Total business floor area</b>     | <b>346,336</b>   | <b>260,147</b>   | <b>572,394</b>   |
| <b>Total internal floor area</b>     | <b>1,035,302</b> | <b>2,477,018</b> | <b>2,032,126</b> |



**Table 13. Proportional change in internal floor area by city-based industry sector, by five-year periods, 2007-2022**

| City-based industry sector           | %Δ 2007-12  | %Δ 2012-17   | %Δ 2017-22  |
|--------------------------------------|-------------|--------------|-------------|
| Community                            | 4.7%        | 6.4%         | 17.8%       |
| Creative industries                  | 2.5%        | -8.2%        | -5.3%       |
| Finance and financial services       | 5.3%        | -2.0%        | 0.8%        |
| Food and drink                       | 14.1%       | 12.4%        | -4.6%       |
| Government                           | -5.3%       | 9.1%         | -6.5%       |
| Health                               | 10.2%       | 13.1%        | 1.0%        |
| Higher education and research        | 13.5%       | 18.2%        | 3.5%        |
| ICT                                  | -8.3%       | 9.8%         | 7.0%        |
| Life science (bio-tech)              | -14.1%      | 5.8%         | -7.4%       |
| Manufacturing                        | -36.4%      | -43.4%       | -14.2%      |
| Motor vehicle                        | 13.7%       | -7.2%        | 12.7%       |
| Natural resource-based industries    | -35.3%      | -18.0%       | -14.5%      |
| Professional and business services   | 28.5%       | 5.8%         | -5.3%       |
| Property development and operation   | 3.8%        | 54.1%        | -6.5%       |
| Retail and personal services         | 12.6%       | 7.1%         | -5.6%       |
| Social capital                       | 10.3%       | 5.5%         | 2.5%        |
| Tourist, cultural and leisure        | 3.9%        | 13.4%        | 6.0%        |
| Transport and logistics              | -7.3%       | -14.3%       | -3.4%       |
| Utilities                            | -26.9%      | 47.0%        | 1.4%        |
| <b>Occupied business floor area</b>  | <b>3.5%</b> | <b>4.5%</b>  | <b>0.0%</b> |
| Vacant business floor area           | -10.2%      | -28.4%       | 49.4%       |
| Occupied business floor space        | 3.5%        | 4.5%         | 0.0%        |
| <b>Total business floor area</b>     | <b>2.0%</b> | <b>1.5%</b>  | <b>3.2%</b> |
| Private households                   | 5.3%        | 15.8%        | 9.7%        |
| Non-private households               | 31.8%       | 81.4%        | 7.8%        |
| Other                                | 9.2%        | 4.8%         | 3.9%        |
| Redevelopment                        | -43.5%      | 18.9%        | 0.8%        |
| <b>Total non-business floor area</b> | <b>4.5%</b> | <b>13.8%</b> | <b>8.0%</b> |
| <b>Total business floor area</b>     | <b>2.0%</b> | <b>1.5%</b>  | <b>3.2%</b> |
| <b>Total internal floor area</b>     | <b>3.2%</b> | <b>7.4%</b>  | <b>5.6%</b> |

Figure 5. Proportion of occupied business floor area by top six industry sectors, 2007-2022



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## Workspace ratios

Workspace ratios are an indication of the average number of square metres within which employees work for a particular industry sector. The ratio is determined by dividing the internal floor area (in square metres) of a categorised industry grouping by the total number of employees recorded for that grouping. Ratios can be determined using the Industry Divisions, Space Use Divisions, Office space uses and Occupied Office space uses, where the floor area is divided by total employees. The ratios for each category can be used for projecting the anticipated population of new developments, and to determine how space uses are managed over time.

Table 14 shows the industry-wide workspace ratios for all sectors in the city from 2007 to 2022. Where the workspace ratio for a later Survey is less than the previous one there has been an intensification of employment to space use for that industry sector. Thirteen of the nineteen industry sectors experienced more intensive utilisation of floor space per worker over the past five years, despite the impacts for Covid-19.

Overall, the average workspace ratio for the City fell from 33.3 in 2017 to 32.1 in 2022. The overall decrease occurred due to the growth in employment (3.6%) outstripping the growth in occupied business floor space (-0.02%). The largest workspace ratio decrease occurred in the *Retail and personal services* industry sector, with a fall of 10.5m<sup>2</sup> per worker, driven by jobs increase of 20.1% and occupied floor area decrease of -5.6%.

The *Finance and financial services* sector has the lowest workspace ratio for the City at 13.6m<sup>2</sup> per worker. *Professional and business services* sector has a relatively low workspace ratio of 17.4. The industries with the lower workspace ratios tend to have higher concentrations of office spaces, such as open plan offices where many people work in the same area.

Those industries with higher workspace ratios tend to have very large areas with little or no employment, such as showrooms (*Retail and personal services* or *Motor vehicle*) or public spaces (*Community* or *Tourist, culture and leisure*). The CBD and Harbour Village has the lowest average workspace ratio across all industry sectors at 21.8, whilst Green Square and City South has the highest average workspace ratio at 79.9.

**Table 14. Average workspace ratios by city-based industry sector, 2007-2022**

| City-based industry sector         | 2007        | 2012        | 2017        | 2022        |
|------------------------------------|-------------|-------------|-------------|-------------|
| Community                          | 66.1        | 66.3        | 71.5        | 68.5        |
| Creative industries                | 39.7        | 37.7        | 36.7        | 35.5        |
| Finance and financial services     | 18.0        | 17.3        | 14.6        | 13.6        |
| Food and drink                     | 25.7        | 22.3        | 26.3        | 20.6        |
| Government                         | 30.5        | 35.2        | 29.1        | 31.8        |
| Health                             | 49.8        | 38.7        | 41.8        | 38.3        |
| Higher education and research      | 51.2        | 47.4        | 47.9        | 51.1        |
| ICT                                | 31.1        | 27.3        | 23.7        | 22.3        |
| Life science (bio-tech)            | 33.5        | 35.6        | 27.5        | 22.9        |
| Manufacturing                      | 83.8        | 61.5        | 54.0        | 51.5        |
| Motor vehicle                      | 105.6       | 101.6       | 117.3       | 122.8       |
| Natural resource-based industries  | 26.4        | 23.5        | 16.7        | 16.7        |
| Professional and business services | 23.1        | 21.0        | 17.4        | 17.4        |
| Property development and operation | 27.4        | 29.0        | 20.1        | 18.8        |
| Retail and personal services       | 44.2        | 44.2        | 48.9        | 38.5        |
| Social capital                     | 54.7        | 51.6        | 44.4        | 41.8        |
| Tourist, cultural and leisure      | 110.0       | 97.7        | 102.6       | 92.4        |
| Transport and logistics            | 112.4       | 108.5       | 112.8       | 148.6       |
| Utilities                          | 52.1        | 60.0        | 44.5        | 43.2        |
| <b>Total</b>                       | <b>40.1</b> | <b>36.7</b> | <b>33.3</b> | <b>32.1</b> |

# Space and capacity

## Space use

The City of Sydney Floor Space and Employment Survey collects data in three levels, from individual 'Space Units' (space uses), which belong to 'Establishments', which are in 'Buildings'. The FES data classifies all floor area within the LGA according to the way in which the space is used, such as office, residential, shop, industrial, food/eating, transport, parking or storage uses. Each space use is assigned a code, which is categorised according to fourteen different space use divisions. Space Use codes are also used to record employment, seating capacities, dwelling and room numbers and parking spaces. These space uses can then be related to the industry use of each establishment, and the location of each building.

Table 15 indicates the internal floor area by Space Use Division within the City of Sydney from 2007 to 2022. The City has a diverse mix of floor space uses, dominated by *Residential* and *Office* space use types. Between them, they account for almost half of the floor space in the City, with 30.4% and 19.9% respectively. Nearly a quarter of the remaining floor space is used for *Parking* (14.3%) or *Common* (circulation) *Area* within buildings (7.8%).

**Table 15. Internal area by space use division, 2007-2022**

| Category              | 2007      | 2012      | 2017       | 2022       |
|-----------------------|-----------|-----------|------------|------------|
| Office                | 6,603,813 | 6,915,781 | 7,546,557  | 7,611,629  |
| Shop/Showroom         | 922,703   | 976,483   | 998,979    | 1,017,595  |
| Residential           | 9,004,218 | 9,448,146 | 10,691,568 | 11,619,622 |
| Storage               | 1,919,929 | 1,916,392 | 1,853,153  | 1,805,755  |
| Industrial            | 1,155,965 | 735,764   | 543,058    | 515,419    |
| Visitor Accommodation | 1,135,568 | 1,179,677 | 1,340,777  | 1,436,555  |
| Entertainment/Leisure | 776,837   | 864,998   | 935,536    | 986,201    |
| Restaurant/Eating     | 624,672   | 716,303   | 901,735    | 936,660    |
| Community             | 606,025   | 607,301   | 740,683    | 771,845    |
| Utilities             | 1,523,060 | 1,580,129 | 1,783,077  | 1,869,473  |
| Parking               | 4,263,872 | 4,625,521 | 5,116,580  | 5,468,770  |
| Transport             | 269,445   | 275,094   | 279,108    | 283,002    |
| Common Area           | 2,604,554 | 2,912,606 | 2,638,038  | 2,996,158  |
| Other Infrastructure  | 1,217,743 | 909,509   | 771,873    | 856,000    |

In eight of the ten Villages, *Residential* floor space is the dominant space use type, with two Villages (Glebe Point Road and Macleay Street and Woolloomooloo) having more than half of all internal floor space as residential living space. The predominant space use type in the CBD and Harbour and Chinatown and CBD South Villages is *Office*, with 40.9% and 19.5% respectively.

Table 16 shows counted employment by selected Space Use Divisions for the City of Sydney from 2007 to 2022. Those Space Uses with minor, or no employment have been aggregated into the *Other* category. Employment numbers in the Space Use Divisions relate to maximum workers in the office and does not include the remaining workers who were working from home. Total jobs include workers counted in the office and those working from home.

**Table 16. Counted workers by selected space use divisions, 2007-2022**

| Category              | 2007    | 2012    | 2017    | 2022    |
|-----------------------|---------|---------|---------|---------|
| Office                | 318,909 | 351,076 | 425,520 | 395,918 |
| Shop/Showroom         | 20,244  | 23,396  | 18,682  | 24,022  |
| Industrial            | 8,488   | 9,083   | 5,733   | 6,094   |
| Entertainment/Leisure | 4,510   | 6,565   | 7,085   | 9,541   |
| Restaurant/Eating     | 22,313  | 28,910  | 29,054  | 35,220  |
| Community             | 3,813   | 6,392   | 8,738   | 9,619   |
| Other                 | 6,500   | 9,118   | 6,161   | 8,088   |

The majority (81.0%) of workers in the city are located on *Office* space. In 2022 395,918 workers were counted in *Office* space, 29,602 less than five years previously. The main reason for this result is the number of office workers who were working from home at the time of the Survey. The *Restaurant/Eating* Space Use Division holds the second highest number of workers with 35,220, or 5.8% of the counted workers, whilst 24,022 workers (5.3%) were counted in *Shop/Showroom* space. Combined, these three space uses account for 93.9% of the total counted workers for the city.

Table 17 shows the workspace ratios for the six main employment generating Space Use Divisions. The *Office* Space Use Division has the lowest workspace ratio (19.2). This result has increased since the last Survey after consecutive declines owing to the number of employees working from home leading to a less intensive utilisation of office space. The *Restaurant/Eating* and *Shop/Showroom* divisions had the next lowest workspace ratios (26.6 and 42.4 respectively). Both these divisions had an intensification of use. As part of the service economy, the option for working from home was much less viable. The other Space Use Divisions have much lower total employment numbers and are less intensive in their use of floor area for employment, generally using space for ancillary business purposes.

**Table 17. Workspace ratios by selected space use divisions, 2007-2022**

| Category              | 2007  | 2012  | 2017  | 2022  |
|-----------------------|-------|-------|-------|-------|
| Office                | 20.7  | 19.7  | 17.7  | 19.2  |
| Shop/Showroom         | 45.6  | 41.7  | 53.5  | 42.4  |
| Industrial            | 136.2 | 81.0  | 94.7  | 84.6  |
| Entertainment/Leisure | 172.2 | 131.8 | 132.0 | 103.4 |
| Restaurant/Eating     | 28.0  | 24.8  | 31.0  | 26.6  |
| Community             | 158.9 | 95.0  | 84.8  | 80.2  |

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## Capacity

The FES collects several capacity measures that are related to different types of space uses. The capacities are recorded for each individual space record. Capacities include the number of residential dwellings (reported in the City's Housing Audit), visitor accommodation (noted in the key totals section), and in Table 16 below the capacity of *Cafés* and *Restaurants* seating across the city.

Between 2007 and 2017 the quantity of indoor and outdoor seating in cafes and restaurants was rising steadily. Covid-19 had a significant impact on the *Food and drink* sector, which many businesses having to close as patrons were kept away. Between 2017 and 2022 the number of cafés fell by 8.3% (87 fewer) whilst the number of restaurants increased by 3.9% (48 more).

There were 1,049 cafés counted in 2017. By the 2022 Survey 411 of those had closed with 324 new café establishments opening. There were 1,217 restaurants counted in 2017. By the 2022 Survey 455 of those had closed with 503 new restaurants opening.

Since 2017 there has been a 6.8% increase in the number of indoor restaurant seats and a 3.4% increase in outdoor seating. The number of restaurant establishments rose from 1,217 to 1,265. Over the same period there was a 15.1% decrease in indoor café seating and a 9.8% decrease in outdoor café seating. The number of café establishments fell from 1,049 to 962. The average number of seats per establishment has decreased for *Cafés* in the City but increased for *Restaurants*. Table 18 shows the indoor and outdoor seating capacity for cafés and restaurants from 2007 to 2022.

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**Table 18. Seating capacity for cafés and restaurants, 2007-2022**

| Category                    | 2007   | 2012   | 2017   | 2022   |
|-----------------------------|--------|--------|--------|--------|
| Capacity measures           |        |        |        |        |
| Café seating - indoor       | 20,016 | 24,627 | 29,684 | 25,209 |
| Café seating - outdoor      | 7,104  | 8,384  | 9,658  | 8,714  |
| Café seating - total        | 27,120 | 33,011 | 39,342 | 33,923 |
| Restaurant seating - indoor | 48,778 | 64,139 | 72,611 | 77,562 |
| Restaurant seating- outdoor | 6,992  | 9,461  | 11,217 | 11,599 |
| Restaurant seating- total   | 55,770 | 73,600 | 83,828 | 89,161 |



