CITY OF SYDNEY

Visitor Accommodation Monitor

June 2023

Visitor Accommodation Monitor
2022 - 2023

The City of Sydney acknowledges the Gadigal of the Eora Nation as the Traditional Custodians of our local area.

Contents

Contents 2
List of tables 3
List of figures 4

Introduction 6
Background 6
Methodology 7
Stages of the development cycle 7
Expected completion dates 7
Covid-19 impacts 8
Development monitor web map 8
Disclaimer 8
Visitor Accommodation Trends 9
Summary of Development Activity 12
Pipeline at 30 June 2023 13
CBD Villages 14
Southern Villages 19
Western Villages 21
Appendix A 23
Maps of completed visitor accommodation developments from 2018/19 - 2022/23 23
Appendix B 28
Maps of the visitor accommodation development pipeline from 2023/24 -2027/28 28

List of tables

Table 1: Occupancy rate of visitor accommodation stock in Metropolitan Sydney. 9
Table 2: Guest nights (millions) in the local area over the last ten years. 10
Table 3. Total visitor accommodation completions past and future by village 11
Table 4. Net total rooms/units/beds completed in 2022/23 12
Table 5. Accommodation completed in 2022/23 by village group. 12
Table 6. Accommodation in the pipeline by status and type 13
Table 7. CBD Villages - Completions and pipeline developments by financial year. 14
Table 8. CBD Villages - Pipeline developments by status 15
Table 9. Eastern Villages - Completions and pipeline developments by financial year. 17
Table 10. Eastern Villages - Pipeline developments by status 18
Table 11. Southern Villages - Completions and pipeline developments by financial year 19
Table 12. Southern Villages - Pipeline developments by status 20
Table 13. Western Villages - Completions and pipeline developments by financial year. 21
Table 14. Western Villages - Pipeline developments by status 22

List of figures

Figure 1. Map of the City of Sydney local area showing grouping of villages 6

Appendix A: Completed Visitor Developments 2017/18-2021/22 CBD Villages 24

Appendix A: Completed Visitor Developments 2017/18-2021/22 Eastern Villages 25

Appendix A: Completed Visitor Developments 2017/18-2021/22 Southern Villages 26

Appendix A: Completed Visitor Developments 2017/18-2021/22 Western Villages 27

Appendix B: Visitor Development Pipeline 2022/23-2026/27 CBD Villages 29

Appendix B: Visitor Development Pipeline 2022/23-2026/27 Eastern Villages 30

Appendix B: Visitor Development Pipeline 2022/23-2026/27 Southern Villages 31

Appendix B: Visitor Development Pipeline 2022/23-2026/27 Western Villages 32

This page is intentionally left blank

Introduction

Background

The City of Sydney ("the City") recognises the availability of visitor accommodation is important to the success of the local and national economies. Around 7.4 million domestic and international overnight visitors stay in our city annually for a range of purposes including leisure, education or carrying out business . The City of Sydney's Community Strategic Plan sets the framework for the future of the city. There are several targets the City has set to reach the vision of where the community wants the city to be in 2050.

In the City's Community Strategic Plan, Objective 9.4 Creativity and great experiences fuel the vitality of the city states that by 2050:

- The city has become more than a place of work and business, it is the destination for a range of great experiences day and night
- The city is a destination of choice providing experiences across the 24-hour economy, attracting local and global visitors

The Visitor Accommodation Monitor addresses this action by measuring progress and providing a comprehensive overview of pipeline activity as at 30 June year end as well as a snapshot of total visitor accommodation stock by establishment type including hotels, serviced apartments and backpackers in the city and geographic variation by small area. It is noted that this report does not cover AirBnB stock.

There are 10 City of Sydney villages that have been grouped into four distinct areas for the purpose of analysis and discussion in this report:

CBD villages: CBD and Harbour, Chinatown and CBD South

Eastern villages: Macleay Street and Woolloomooloo, Oxford Street, Crown and Baptist Streets

Southern villages: Green Square and CBD South, Redfern Street, King Street

Western villages: Glebe Point Road, Harris Street

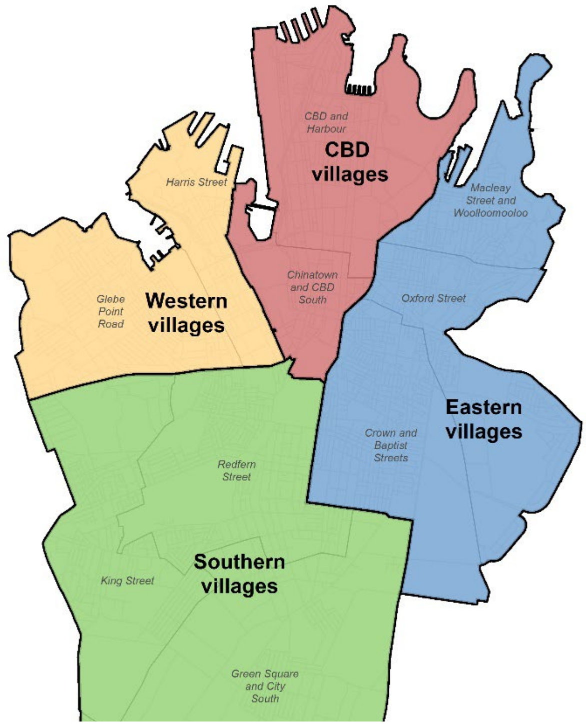


Figure 1. Map of the City of Sydney local area showing grouping of villages

Methodology

Development applications track the amount of construction in the city and the amount of visitor accommodation built.

Stages of the development cycle

Developments are grouped by the following categories:

1. **Lodged** – developments that have been submitted for approval but have not yet been approved by the relevant authority at the report date.
2. **Approved** – developments that have been approved by relevant authorities but have yet to commence at the report date.
3. **Commenced** – developments that are currently under construction but have yet to be completed at the report date.
4. **Completed** – developments that have completed construction within the last 5 years

All developments that contribute to the city's visitor accommodation stock are captured in this report. “Visitor accommodation” includes hotel rooms, serviced apartment rooms and backpacker beds. The classification "hotel rooms" includes rooms in standard hotels, bed and breakfasts, pubs and motels. This report does not cover the amount of AirBnB accommodation in the city. The report includes new visitor accommodation establishments and any additional rooms, conversions, alterations and renovations that impact the stock of visitor accommodation in the City.

Expected completion dates

When a development application is lodged it is assigned an estimated completion date. The expected completion date is reviewed each time the development moves through a stage in the development cycle and is revised when appropriate. The estimated completion date is based on the size and type of development.

Covid-19 impacts

Covid-19 had substantial impacts on accommodation development from 2020 onwards.

Impacts included:

- Covid-19 safety plans required on construction sites
- Worker numbers reduced on construction sites due to density limitations
- Mandatory vaccination of workers from LGAs of concern on construction sites
- Workers having to isolate
- Shortages of building materials due to global supply chain issues
- Labour shortages

The flow-on effects of these impacts delayed the commencement and extended the completion of numerous projects. There was a significant dip in completed development in 2021/22 and 2022/23. Projections are for completion rates to reach pre-Covid-19 levels from 2023/24 onwards. The forecast completions within this report should be used as a guide.

Development monitor web map

The Development Monitor web map is an interactive map which has been produced to complement the City Monitor reports. The map provides additional spatial context. It shows the geographic distribution of development in the City of Sydney local area. This map is available on the City of Sydney website via the City of Sydney Data Hub webpage: https://cityofsydney.maps.arcgis.com/apps/instant/interactivelegend/index.html?appid=9956d5c0b31243f1b6eaf24de615fdaa

Disclaimer

While all care is taken to ensure this data is accurate, the Urban Analytics team relies on what has been reported in the Statement of Environmental Effects submitted with a development application. In addition, if the development application is lodged as a concept plan, key details may not be available at the time of lodgement and will be updated when available.

Please direct any questions about this data to the Urban Analytics team research@cityofsydney.nsw.gov.au

Visitor Accommodation Trends

During the 2022/23 financial year, 7.4 million international and domestic overnight visitors stayed in commercial accommodation located in the City of Sydney LGA; collectively, this represented approximately 36.2 million guest nights. This data is sourced from Tourism Research Australia: International Visitor Survey (IVS) and National Visitor Survey (NVS) 2023.

Average annual occupancy rates for central Sydney have increased during the last financial year as the accommodation sector returns to pre-pandemic levels of occupancy.

Table 1: Occupancy rate of visitor accommodation stock in Metropolitan Sydney.

Reporting Period	Occupancy Rate
Jul-Sept 2022	66%
Oct-Dec 2022	75%
Jan-Mar 2023	76%
Apr-Jun 2023	73%

Source: STR via Destination NSW https://www.destinationnsw.com.au/tourism/facts-and-figures/accommodation#accommodation

In the 10-year period to 2022/23, the number of international and domestic overnight visitors staying annually in commercial accommodation is increasing back to pre-pandemic levels. This can be seen below in Table 2 from 34.46 million in 2019/20 to 36.22 million in 2022/23.

The impact of Covid-19 is particularly evident during 2020/21 when international guest nights were down to 70,000 and in 2021/22 when international guest nights reached 1.69 million. International guest nights improved to 19.27 million in 2022/23 with the removal of border restrictions.

Domestic guest nights during Covid-19 in 2020/21 was approximately 8 million and this further increased in 2021/22 to 8.5 million. This rate is comparable to domestic travel in 2013/14 when domestic guest nights were at 6.5 million. Domestic guest nights more than doubled in 2022/23 reaching approximately 17 million.

Table 2: Guest nights (millions) in the local area over the last ten years.

Financial Year	International Guest Nights (millions)	Domestic Guest Nights (millions)	Total Guest Nights (millions)
2013/14	29.85	6.55	36.40
2014/15	30.82	10.18	41.00
2015/16	28.24	8.90	37.14
2016/17	26.39	10.63	37.02
2017/18	26.27	13.54	39.81
2018/19	27.32	16.47	43.79
2019/20	20.14	14.32	34.46
2020/21	0.07	7.99	8.06
2021/22	1.69	8.52	10.21
2022/23	19.27	16.95	36.22

Source: Tourism Research Australia International and National Visitor Surveys (2023)

Table 3. Total visitor accommodation completions past and future by village

Completed visitor accommodation developments by village from 2018/19 - 2022/23 and pipeline developments from 2023/24– 2027/28.

Financial Year	CBD and Harbour	Chinatown and CBD South	Crown and Baptist Streets	Macleay Street and W’ mooloo	Oxford Street	Green Square and City South	King Street	Redfern Street	Harris Street	Glebe Point Road	LGA
18/19	36	11	70	45	-	16	-	297	553	-	1,028
19/20	688	-	8	-	25	144	-	11	62	-	938
20/21	543	-	-	-	-	72	-	-	-	-	615
21/22	230	8	-	-	8	71	-	-	91	-	408
22/23	314	103	38	-	-	-	19	59	-	-	533
23/24	709	2,539	332	245	111	22	-	39	21	86	4,104
24/25	550	2,869	273	80	221	-	-	119	2	-	4,114
25/26	351	1,194	-	49	-	-	-	112	-	-	1,706
26/27	200	554	-	-	-	-	-	76	-	-	830
27/28	-	-	-	-	-	-	-	-	-	-	0
Total	3,621	7,278	721	419	365	325	19	713	729	86	14,276

Table 3 shows the number of completed accommodation stock by village area and the total local area from 2018/19 to 2022/23. It also includes the forecast completions for 2023/24 to 2027/28 based on known development applications and estimated completion dates as of 30 June 2023.

Completion rates for hotel rooms were longer during Covid-19, but not as significantly impacted as other development sectors.

Global impacts of Covid-19 on supply chains have created a shortage of building materials and increased building costs. In addition, ongoing labour shortages may have prolonged completion dates.

High completion rates are projected in the CBD villages of Chinatown and CBD South with over 7,000 units of accommodation stock to be built. Notably CBD and Harbour had the most accommodation rooms completed across all villages in 2022/23.

Summary of Development Activity

Table 4. Net total rooms/units/beds completed in 2022/23

Accommodation Type	Number of Hotel Rooms/ Beds/ Units	Percentage of Total
Hotel Rooms	533	99.3%
Backpacker Beds	0	0.0%
Serviced Apartments	4	0.7%
Total	537	100%

In 2022/23 there were 8 developments completed that had a visitor accommodation component. These developments provided a net total of 537 additional rooms/units. There were no new backpacker beds completed in 2022/23. The majority of new visitor accommodation stock completed in 2022/23 were hotel rooms.

More than 75% of new rooms were in the CBD village as seen below in Table 5.

Table 5. Accommodation completed in 2022/23 by village group.

Village Group	Rooms/Units/Beds Completed 2022/23
CBD villages	417
Eastern villages	38
Southern villages	82
Western villages	0
Total	**537**

Pipeline at 30 June 2023

At 30 June 2023 there were a total of 9,230 hotel rooms, 532 serviced apartment units and 874 backpacker beds in the development pipeline, a total capacity of 10,636.

Table 6. Accommodation in the pipeline by status and type

Status	Hotel Rooms	Serviced Apartment Units	Backpacker Beds	Total
Lodged	1,393	-	91	1,484
Approved	5,389	438	783	6,610
Construction Commenced	2,448	94	-	2,542
Total	**9,230**	**532**	**874**	**10,636**

Hotel developments make up the largest proportion of visitor accommodation stock in all stages of the development pipeline. As of 30 June 2023 hotel rooms contributing to:

- 93.9% of total stock in the Lodged stage, where a DA has been submitted but not yet approved.
- 81.5% of total stock in the Approved stage, where a DA has been approved by Council but construction has not yet commenced.
- 96.3% of total stock in the Construction Commenced stage, where a development is being constructed but has not yet been completed.

CBD Villages

Table 3. Completions and pipeline developments by financial year.

The number of visitor accommodation types completed and in the pipeline by financial year in the CBD and Chinatown villages.

Financial Year	Number of Hotel Rooms	Percentage of Hotel Rooms	Number of Backpacker Beds	Percentage of Backpacker Beds	Number of Serviced Apartments	Percentage of Serviced Apartments	Total number Visitor Accommodation types
18/19	11	11.5%	0	0.0%	85	88.5%	96
19/20	584	84.9%	0	0.0%	104	15.1%	688
20/21	543	100.0%	0	0.0%	0	0.0%	543
21/22	238	100.0%	0	0.0%	0	0.0%	238
22/23	417	100.0%	0	0.0%	0	0.0%	417
23/24	2,814	88.0%	291	9.1%	94	2.9%	3,199
24/25	2,912	85.2%	0	0.0%	507	14.8%	3,419
25/26	1,053	68.2%	492	31.8%	0	0.0%	1,545
26/27	754	100.0%	0	0.0%	0	0.0%	754
27/28	0	0.0%	0	0.0%	0	0.0%	0
Total	**9,329**		**783**		**790**		**10,899**

In 2022/23 there were 417 hotel rooms completed in the CBD villages. These were all private dwellings. There was no addition to serviced apartment units or backpacker beds in this period.

There were two major developments with over 100 rooms/units completed in 2022/23:

- Capella Sydney, 23-39 Bridge Street, Sydney (192 hotel rooms)
- Porter House Hotel, 116 Bathurst Street, Sydney (122 hotel rooms)

It should also be noted that the Ibis Budget Hotel at 412 Pitt Street, Haymarket was completed in 2022/23 with 95 hotel rooms. As seen in Table 7, hotel rooms are the main type of visitor accommodation being completed in the CBD Villages and this is forecast to continue in coming years with 7,533 hotel rooms projected over coming 5 years. There was a loss of 49 serviced apartments in 2022/23.

Table 4. Pipeline developments by status

Number of visitor accommodation types in the 2022/23 financial year by development status.

Development Status	Hotel Rooms	Backpacker Beds	Serviced Apartments	Total
Lodged	1,181	0	0	**1,181**
Approved	4,330	783	507	**5,620**
Construction Commenced	2,022	0	94	**2,116**

At 30 June 2023 in the CBD Villages there were:

- 1,181 visitor accommodation rooms / units / beds **lodged but not yet approved**;
- 5,620 visitor accommodation rooms / units / beds **approved but yet to commence construction**; and
- 2,116 visitor accommodation rooms / units / beds **under construction**.

In terms of activity that occurred during the 2022/23 period in the CBD Villages:

- 1,181 hotel rooms were lodged. Of these, the following are major developments with more than 100 hotel rooms:
    - 525-529 George Street, Sydney (292 hotel rooms)
    - 355 Sussex Street, Sydney (279 hotel rooms)
    - 2 Lee Street, Haymarket (250 hotel rooms)
    - 35-75 Harrington Street, The Rocks (200 hotel rooms)
    - 323-339 Castlereagh Street, Haymarket (144 hotel rooms)

- 5,620 visitor accommodation rooms / units / beds were approved. This consists of 4,330 hotel rooms, 783 backpacker beds and 507 serviced apartments. Of these, the following are major developments with more than 100 visitor accommodation rooms / units / beds.
    - 372-382 Pitt Street, Sydney (304 hotel rooms)
    - 499-501 Kent Street, Sydney (220 hotel rooms)
    - 401 Pitt Street, Sydney (173 hotel rooms)
    - 338-348 Pitt Street, Sydney (158 hotel rooms)
    - 388-390 Sussex Street, Sydney (146 hotel rooms)
    - 311-315 Sussex Street, Sydney (106 hotel rooms)
    - 8-10 Lee Street, Haymarket (492 backpacker beds)

- 2,116 visitor accommodation rooms / units / beds began construction. Of these, the following were major developments with more than 100 hotel rooms:
  - 31-33 Wheat Road, Sydney (450 hotel rooms)
  - 136 Hay Street, Haymarket (318 hotel rooms)
  - 55-59 Wentworth Avenue, Sydney (254 hotel rooms)
  - 13 Parker Street, Haymarket (172 hotel rooms)

Eastern Villages

Table 5. Completions and pipeline developments by financial year.

The number of visitor accommodation types completed and in the pipeline by financial year in the Eastern villages.

Financial Year	Number of Hotel Rooms	Percentage of Hotel Rooms	Number of Backpacker Beds	Percentage of Backpacker Beds	Number of Serviced Apartments	Percentage of Serviced Apartments	Total number Visitor Accommodation types
18/19	70	60.9%	0	0.0%	45	39.1%	115
19/20	33	100.0%	0	0.0%	0	0.0%	33
20/21	0	0.0%	0	0.0%	0	0.0%	0
21/22	8	100.0%	0	0.0%	0	0.0%	8
22/23	38	100.0%	0	0.0%	0	0.0%	38
23/24	597	86.8%	91	13.2%	0	0.0%	688
24/25	574	100.0%	0	0.0%	0	0.0%	574
25/26	49	100.0%	0	0.0%	0	0.0%	49
26/27	0	0.0%	0	0.0%	0	0.0%	0
27/28	0	0.0%	0	0.0%	0	0.0%	0
Total	**1,369**		**91**		**45**		**1,505**

In 2022/23 a total of 38 hotel rooms were completed in the eastern villages. Over the past five years, 194 hotel rooms and serviced apartments have been completed. This will increase from 2023/24 onwards with 1,220 hotel rooms and 91 backpacker beds in the pipeline to be built.

Table 6. Pipeline developments by status

Number of visitor accommodation types in the 2022/23 financial year by development status.

Development Status	Hotel Rooms	Backpacker Beds	Serviced Apartments	Total
Lodged	100	91	0	**191**
Approved	733	0	0	**733**
Construction Commenced	387	0	0	**387**

At 30 June 2023 in the Eastern Villages there were:

- 191 hotel rooms and backpacker beds **lodged but not yet approved**;
- 733 hotel rooms **approved but yet to commence construction**; and
- 387 hotel rooms **under construction**.

In terms of activity that occurred during the 2022/23 period in the Eastern Villages:

- 191 rooms / units / beds lodged were lodged. There was no major development lodged with more than 100 dwellings.
- 213 hotel rooms were approved. There was one major accommodation development with more than 100 hotel rooms.
    - 70-72 Commonwealth St, Surry Hills (121 hotel rooms)
- 387 hotel rooms were under construction. Of these, there were two major developments with more than 100 dwellings:
    - 2-38 Baptist St, Redfern (102 hotel rooms)
    - 1-11 Oxford St, Paddington (101 hotel rooms)

Southern Villages

Table 7. Completions and pipeline developments by financial year

The number of visitor accommodation types completed and in the pipeline by financial year in the Southern villages.

Financial Year	Number of Hotel Rooms	Percentage of Hotel Rooms	Number of Backpacker Beds	Percentage of Backpacker Beds	Number of Serviced Apartments	Percentage of Serviced Apartments	Total number Visitor Accommodation types
18/19	313	100.0%	0	0.0%	0	0.0%	313
19/20	144	92.9%	0	0.0%	11	7.1%	155
20/21	0	0.0%	0	0.0%	72	100.0%	72
21/22	0	0.0%	0	0.0%	71	100.0%	71
22/23	78	95.1%	0	0.0%	4	4.9%	82
23/24	61	100.0%	0	0.0%	0	0.0%	61
24/25	119	57.2%	0	0.0%	89	42.8%	208
25/26	112	100.0%	0	0.0%	0	0.0%	112
26/27	76	100.0%	0	0.0%	0	0.0%	76
27/28	0	0.0%	0	0.0%	0	0.0%	0
Total	**903**		**0**		**247**		**1,150**

In 2022/23 there was a total of 82 visitor accommodation stock units completed in the southern villages, including 78 hotel rooms and 4 serviced apartments. There was no major development with over 100 units completed. It should be noted that there was a loss of 158 serviced apartments in the southern villages in 2022/23.

Over the past five years there has been significant visitor accommodation growth in the southern villages with 535 hotel rooms added in this area. It is projected that there will be an increase in the number of hotel rooms over the next five years with 368 hotel rooms.

Table 8. Pipeline developments by status

Number of visitor accommodation types in the 2022/23 financial year by development status.

Development Status	Hotel Rooms	Backpacker Beds	Serviced Apartments	Total
Lodged	112	0	0	**112**
Approved	217	0	0	**217**
Construction Commenced	39	0	0	**39**

At 30 June 2023 in the Southern Villages there were:

- 112 hotel rooms **lodged but not yet approved**;
- 217 hotel rooms **approved but yet to commence construction**; and
- 39 hotel rooms **under construction**.

In terms of activity that occurred during the 2022/23 period in the Southern Villages:

- 100 hotel rooms were lodged. There are no major developments with more than 100 visitor accommodation stock.
- 217 hotel rooms were approved. Of these, there is one major development with more than 100 hotel rooms:
    - 55-59 Regent Street, Chippendale (119 hotel rooms)
- 39 hotel rooms began construction. There are no major developments with more than 100 visitor accommodation stock.

Western Villages

Table 9. Completions and pipeline developments by financial year.

The number of visitor accommodation types completed and in the pipeline by financial year in the Western villages.

Financial Year	Number of Hotel Rooms	Percentage of Hotel Rooms	Number of Backpacker Beds	Percentage of Backpacker Beds	Number of Serviced Apartments	Percentage of Serviced Apartments	Total number Visitor Accommodation types
18/19	0	0.0%	0	0.0%	0	0.0%	0
19/20	62	100.0%	0	0.0%	0	0.0%	62
20/21	0	0.0%	0	0.0%	0	0.0%	0
21/22	91	100.0%	0	0.0%	0	0.0%	91
22/23	0	0.0%	0	0.0%	0	0.0%	0
23/24	107	100.0%	0	0.0%	0	0.0%	107
24/25	2	100.0%	0	0.0%	0	0.0%	2
25/26	0	0.0%	0	0.0%	0	0.0%	0
26/27	0	0.0%	0	0.0%	0	0.0%	0
27/28	0	0.0%	0	0.0%	0	0.0%	0
Total	**262**		**0**		**0**		**262**

In 2022/23 there were 0 hotel rooms/backpacker beds or serviced apartments completed in the western villages. It is projected that 109 hotel rooms will be constructed within the next five years.

Table 10. Pipeline developments by status

Number of visitor accommodation types in the 2022/23 financial year by development status.

Development Status	Hotel Rooms	Backpacker Beds	Serviced Apartments	Total
Lodged	0	0	0	**0**
Approved	109	0	0	**109**
Construction Commenced	0	0	0	**0**

At 30 June 2023 in the Western Villages there were:

- 0 hotel rooms / units / beds **lodged but not yet approved**,
- 109 hotel rooms were **approved but yet to commence construction**,
- 0 hotel rooms / units / beds **under construction**,

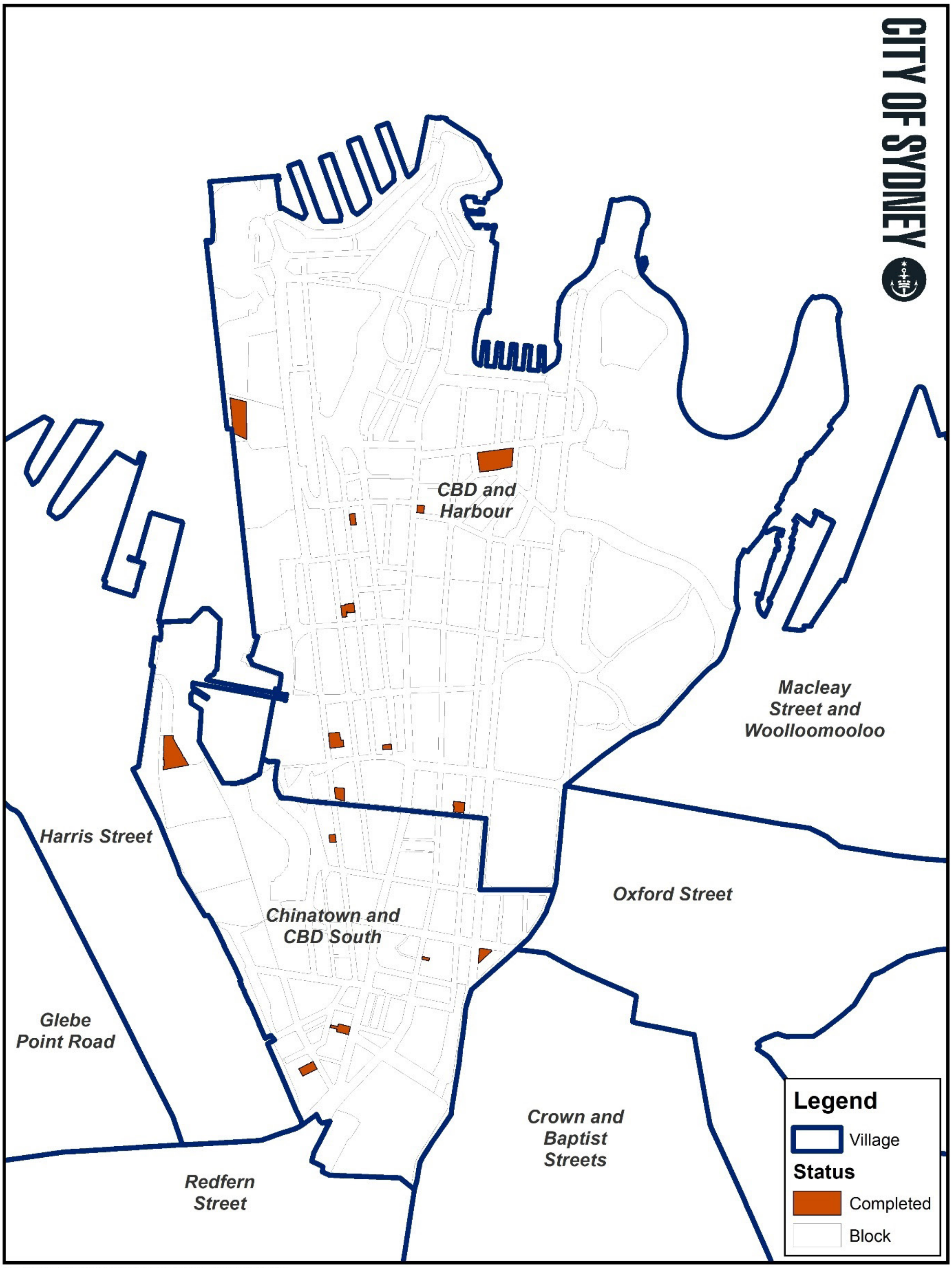
In terms of activity that occurred during the 2022/23 period in the Western Villages:

- 0 hotel rooms / backpacker beds / serviced apartments were lodged. There was one major development with more than 100 rooms.
- 109 hotel rooms were approved. There was no major development with more than 100 rooms.
- 0 hotel rooms / backpacker beds / serviced apartments began construction. There were no major developments with more than 100 rooms that commenced construction.

Appendix A

Maps of completed visitor accommodation developments from 2018/19 - 2022/23

The following series of maps shows the completed visitor accommodation developments by village from 2018/19 to 2022/23 (five-years). From the figures it is evident that major completed developments occurred in the CBD mostly driven by a large number of hotel rooms and serviced apartments.



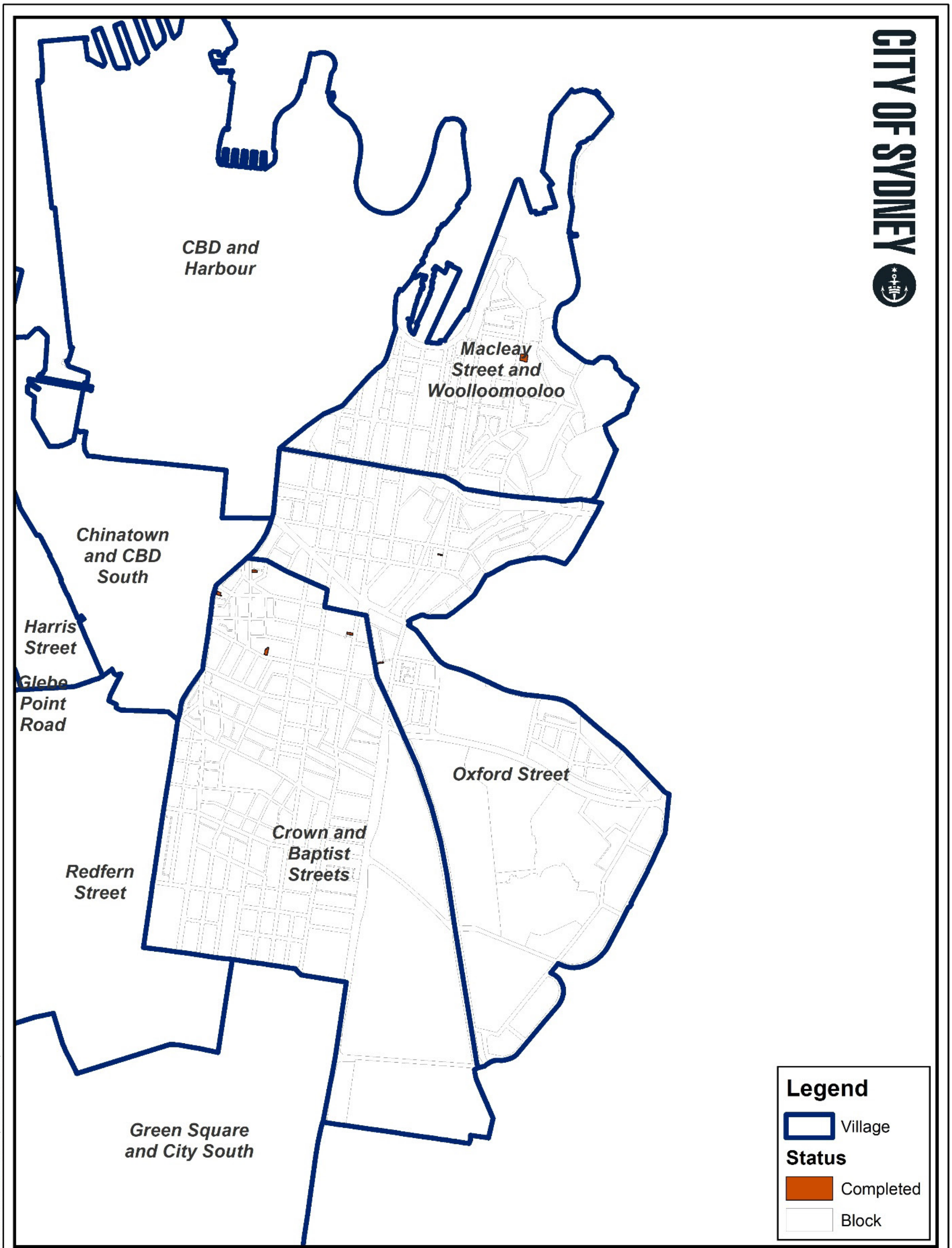
Completed Visitor Developments 2018/19-2022/23

CBD Villages

0 250 500 Metres

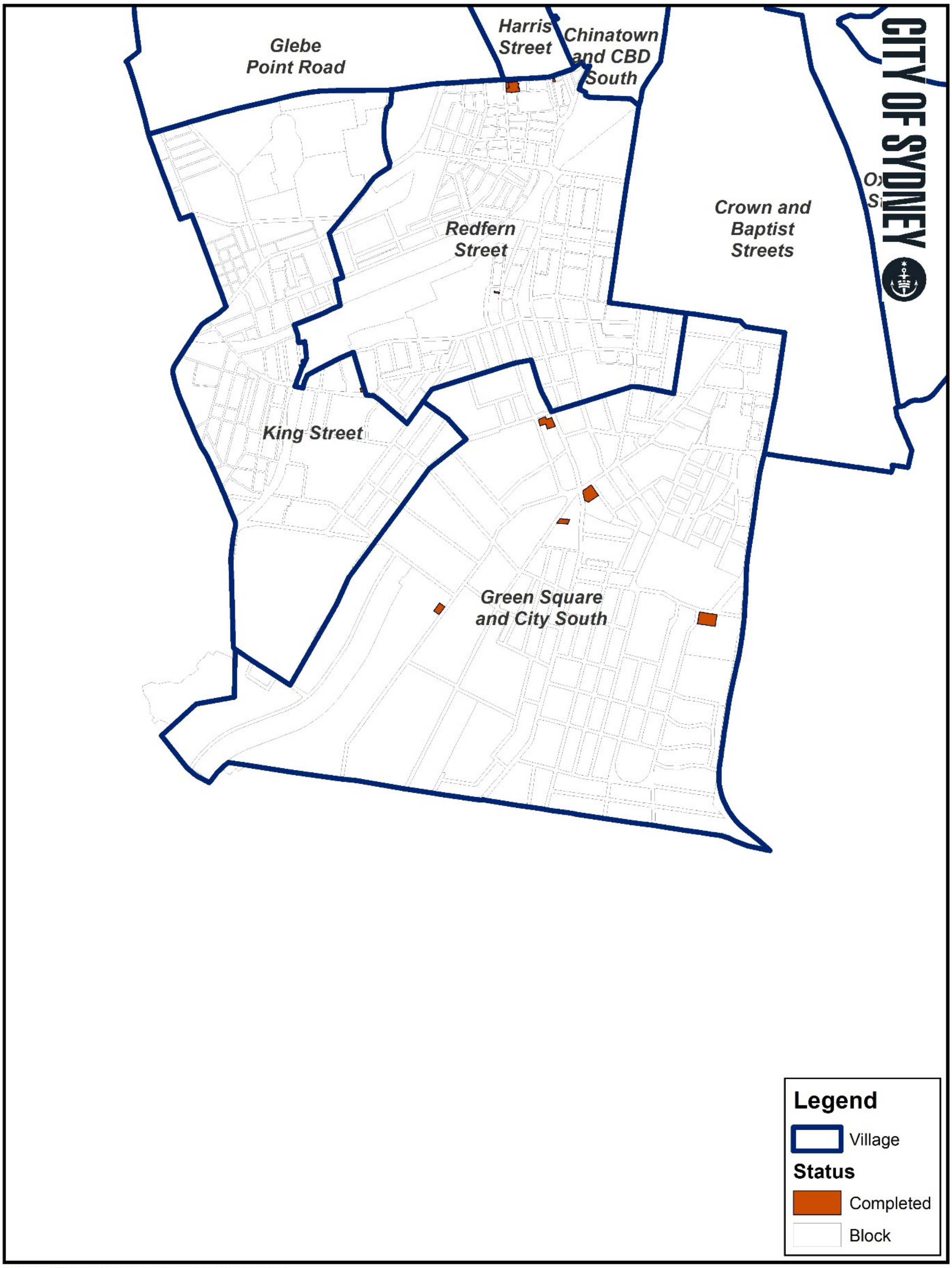
Prepared By: MLamont
Printing Date: 27/03/2024
File: Completed Visitor Developments 2023.mxd
Page Size:A4

U:\RESPLAN\Monitoring\Monitors\04 - Visitor\2022 - 23\Completed Visitor Developments 2023.mxd



Completed Visitor Developments 2018/19-2022/23

Eastern Villages



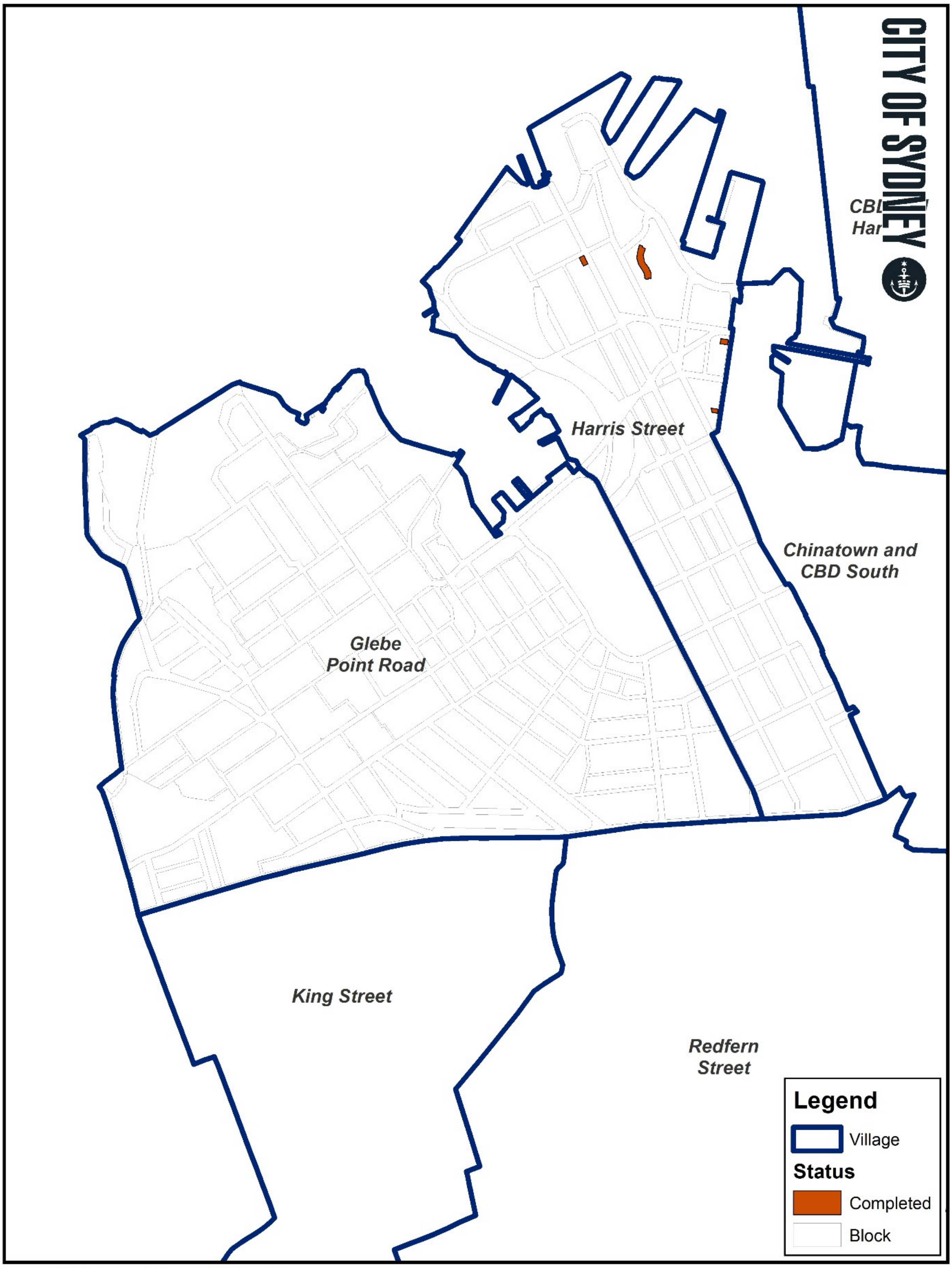
Completed Visitor Developments 2018/19-2022/23

Southern Villages

0 250 500 1,000 Metres

Prepared By: MLamont
Printing Date: 27/03/2024
File: Completed Visitor Developments 2023.mxd
Page Size:A4

U:\RESPLAN\Monitoring\Monitors\04 - Visitor\2022 - 23\Completed Visitor Developments 2023.mxd



Completed Visitor Developments 2018/19-2022/23

Western Villages

0 250 500 Metres

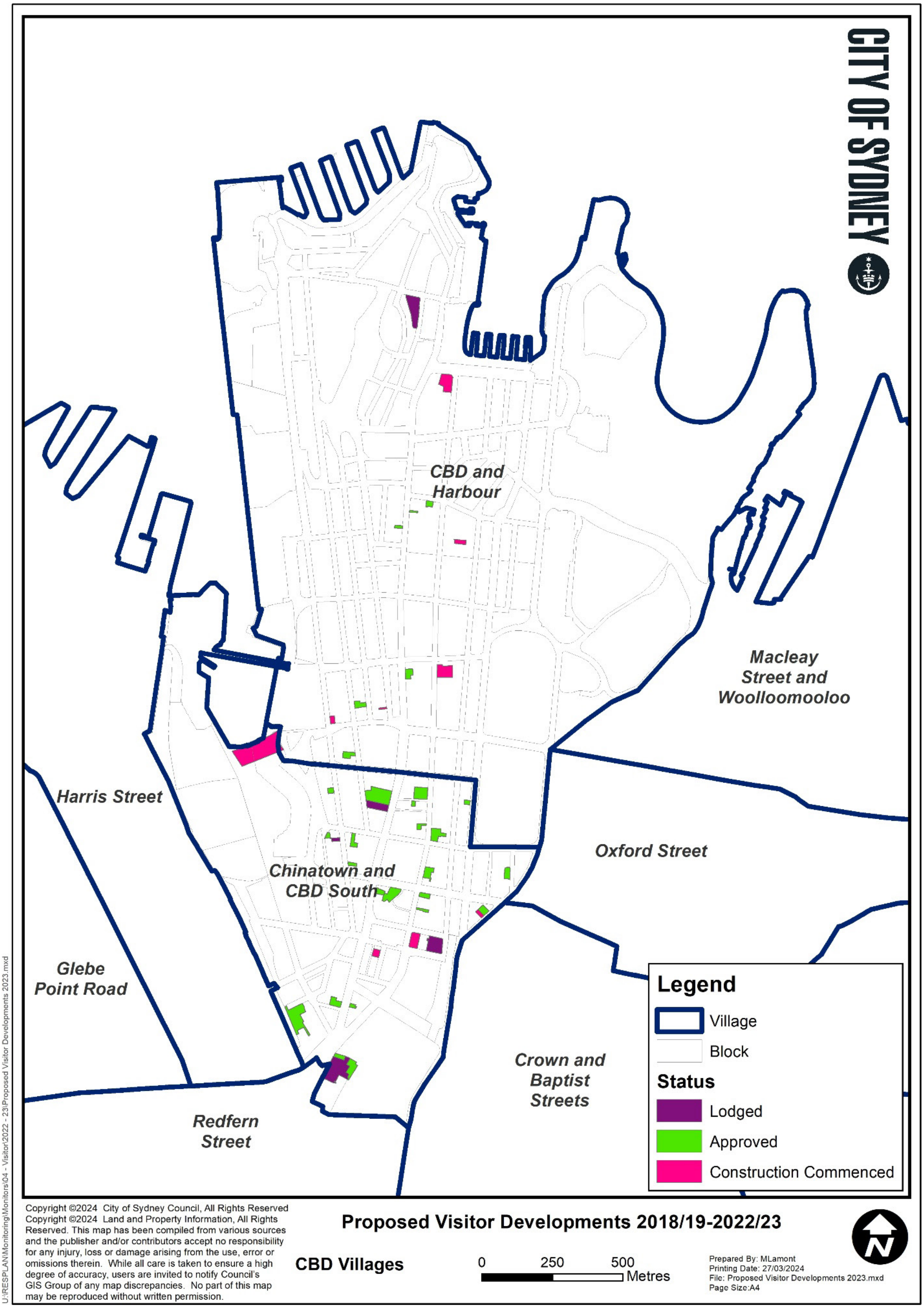
Prepared By: MLamont
Printing Date: 27/03/2024
File: Completed Visitor Developments 2023.mxd
Page Size:A4

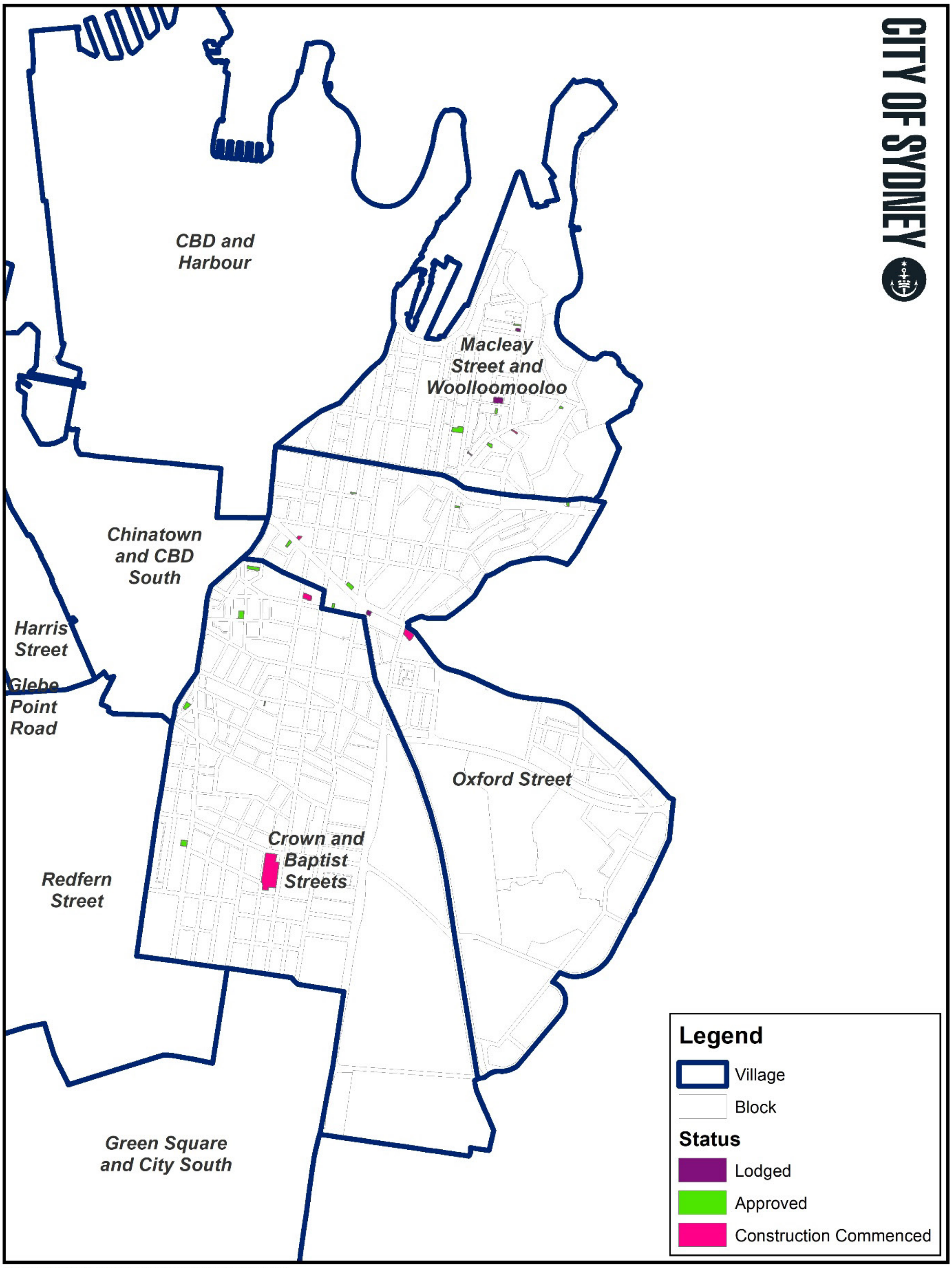
U:\RESPLAN\Monitoring\Monitors\04 - Visitor\2022 - 23\Completed Visitor Developments 2023.mxd

Appendix B

Maps of the visitor accommodation development pipeline from 2023/24 -2027/28

The following series of maps show the accommodation development pipeline by village for the next 5 years. The villages have been divided into employment zones which display the total number of pipeline developments within that area. From the figures it is evident that large accommodation developments are happening in the CBD mostly driven by large hotels under construction.


CITY OF SYDNEY
CBD and Harbour
Macleay Street and Woolloomooloo
Harris Street
Oxford Street
Chinatown and CBD South
Glebe Point Road
Crown and Baptist Streets
Redfern Street
Legend
Village
Block
Status
Lodged
Approved
Construction Commenced
Proposed Visitor Developments 2018/19-2022/23
CBD Villages
0
250
500
Metres
Prepared By: MLamont
Printing Date: 27/03/2024
File: Proposed Visitor Developments 2023.mxd
Page Size:A4
U:\RESPLAN\Monitoring\Monitors\04 - Visitor\2022 - 23\Proposed Visitor Developments 2023.mxd

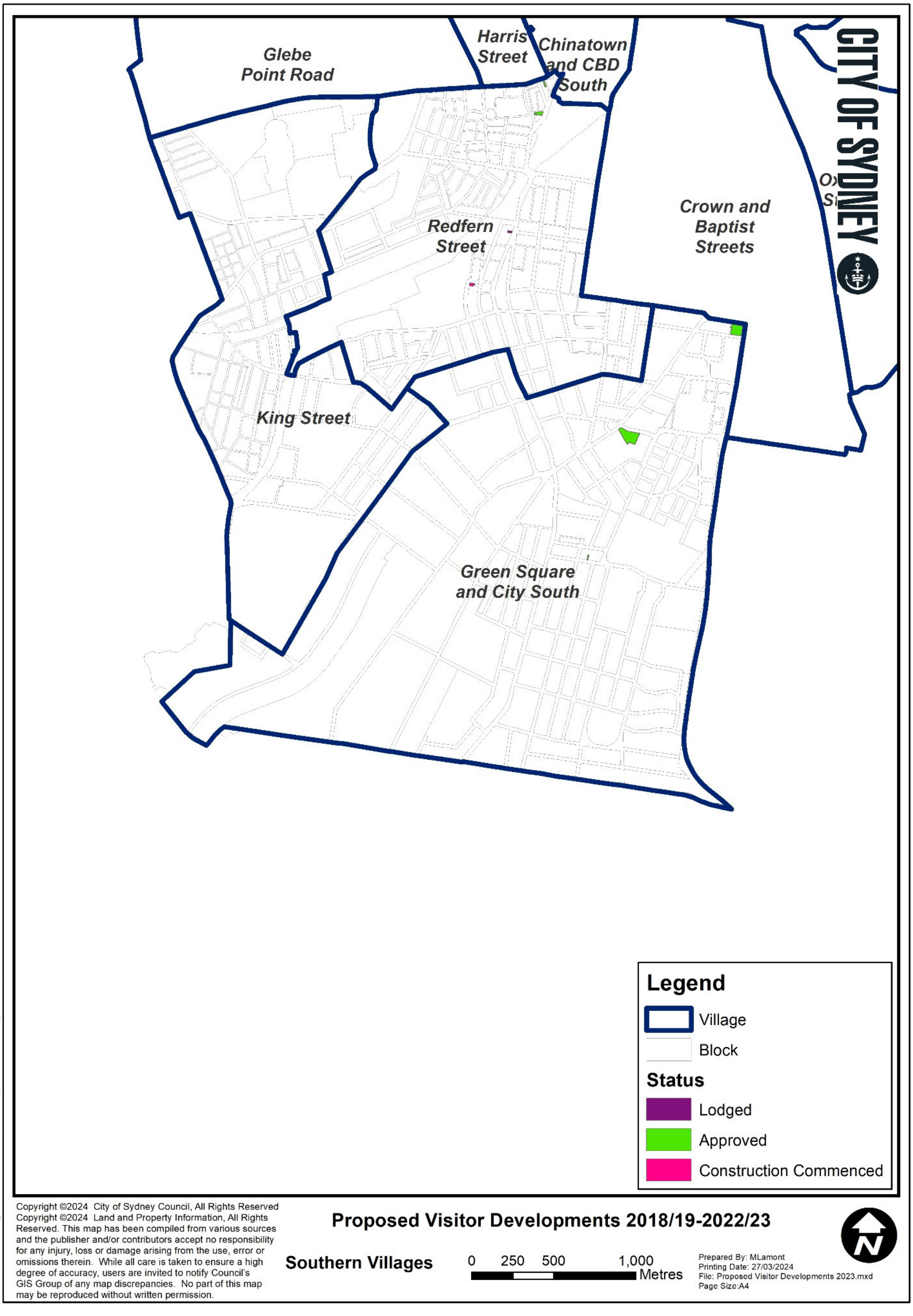


Proposed Visitor Developments 2018/19-2022/23

Eastern Villages

Prepared By: MLamont
Printing Date: 27/03/2024
File: Proposed Visitor Developments 2023.mxd
Page Size:A4

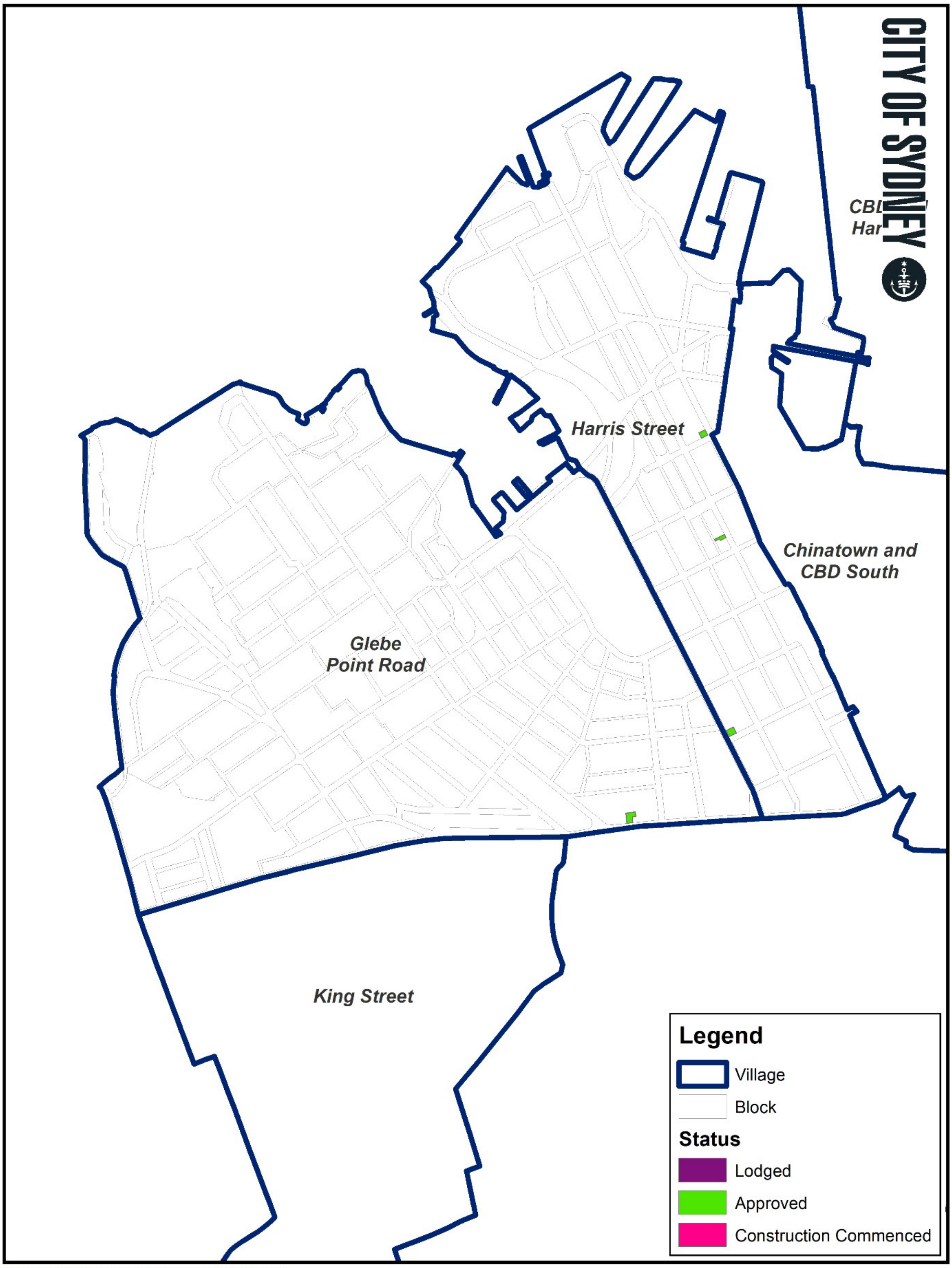
U:\RESPLAN\Monitoring\Monitors\04 - Visitor\2022 - 23\Proposed Visitor Developments 2023.mxd



Proposed Visitor Developments 2018/19-2022/23

Southern Villages

U:\RESPLAN\Monitoring\Monitors\04 - Visitor\2022 - 23\Proposed Visitor Developments 2023.mxd



Proposed Visitor Developments 2018/19-2022/23

Western Villages

0 250 500 Metres

Prepared By: MLamont
Printing Date: 27/03/2024
File: Proposed Visitor Developments 2023.mxd
Page Size:A4

U:\RESPLAN\Monitoring\Monitors\04 - Visitor\2022 - 23\Proposed Visitor Developments 2023.mxd

Enquiries regarding this document should be made to:

Steven Hillier, Manager Urban Analytics

e. research@cityofsydney.nsw.gov.au

p. 02 9265 9333

Town Hall House – 456 Kent Street or GPO Box 1591, Sydney NSW 2000

Council document reference: