



Quarterly Precinct Health Report

Edition 5

April – June 2025



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Contents

| | |
|--|----|
| Municipal Economic Overview..... | 4 |
| Municipal Economic Trends..... | 6 |
| Around the Precincts – Overview..... | 8 |
| Acland Street, St Kilda | 11 |
| Fitzroy Street, St Kilda | 14 |
| Bay Street, Port Melbourne..... | 17 |
| Carlisle Street, Balaclava..... | 20 |
| Clarendon Street, South Melbourne..... | 23 |

Municipal Economic Overview



Resident Spend

Source: Council IQ

What residents are spending on?

Total Spend:
\$1,118.55 million
spent by CoPP residents between
Apr – Jun 2025
Quarterly change: **+22.79M**
Year on year: **+63.99M**

Highest Spend Categories:
Supermarkets **(\$114.43M)**
Other discretionary retail **(\$106.86M)**
Department stores, clothing and accessories **(\$80.75M)**

Highest Spend Growth
Categories (vs 2024)
Online entertainment (Apr)
School education (May)
Childcare services (Jun)



Business Spend

Source: Council IQ

Resident and visitor spend within
the City of Port Phillip

Total Spend:
\$489.19 million
Quarterly change: **-\$28.16M**
Year on year: **+31.85M**

Highest Spend Category:
Supermarkets **(\$103.87M)**
Other discretionary retail **(\$58.88M)**
Groceries and other food retailing **(\$55.09M)**

Highest Spend Growth
Categories (vs 2024)
Breweries and wineries
(Apr/May/Jun)



Event Permits

Source: CoPP Events department




Number of permits issued:
89 (previous quarter: 133)

Category

- Community: 22
- General: 36
- Major: 2
- Market: 6
- Minor: 11
- Promotional: 4
- Street stall: 8

Ward

- Albert Park: 13
- Alma: 3
- Balaclava: 4
- Elwood: 5
- Lakeside: 0
- Montague: 17
- Port Melbourne: 3
- South Melbourne: 16
- St Kilda: 26
- Multiple: 2

|  Customer Requests |  Footpath Trading Permits |  Number of Businesses |
|---|--|--|
| <p>Source: OneCouncil (including Snap, Send Solve) Figures in parentheses are previous quarter</p> <p>Number of requests in precincts:</p> <p>1,198</p> <p>(previous quarter: 1,365)</p> <p>Highest reported issues:</p> <p>Street & laneway cleaning: 142 (109)</p> <p>Dumped rubbish: 124 (132)</p> <p>Illegally parked vehicle: 61 (69)</p> <p>Highest reported precinct:</p> <p>Fitzroy Street 424 (470)</p> | <p>Source: CoPP City Permits team Figures in parentheses are a comparison to previous quarter</p> <p>Total number of permits:</p> <p>666 (-3)</p> <p>Outdoor dining: 435 (+1) / 65% (0%)</p> <p>Number of new approved permits:</p> <p>34 (no change)</p> <p>Outdoor dining: 25 (+2) / 74% (+6%)</p> <p>Total number of parklets:</p> <p>44 (+1)</p> | <p>Source: Australian Business Register. ©2024 Compiled and presented in economy.id by .id (informed decisions)</p> <p>The number of GST registered businesses increased by 2 in the December 2024 quarter – 463 new GST registrations and 461 cancellations.</p> <p>For the September 2024 quarter the number of GST registered businesses increased by 86 – 737 new GST registrations and 651 cancellations.</p> |

Commentary

- The Victorian Tourism Industry Council’s Quarterly Tourism Business Activity and Impact Survey Report June 2025 tells a mixed story for tourism businesses. A decrease in visitors and a softer economy were largely attributed as the reasons for the **38.1%** of respondents who reported weaker business activity. Conversely, **34%** experienced stronger results, with more than half reporting the improvement due to increasing their digital presence.
- Most tourism, hospitality and entertainment businesses in Port Phillip continue to perform well, despite the challenges of rising business and staffing costs. For the quarter to June 2025, the monthly average visitor spend to these businesses was **\$28.79M**, a monthly average increase of **7.3%** compared to 2024. Spend by visitors accounted for an average of **68.6%** of total spend in this category, compared to **31.4%** by Port Phillip residents.
- This quarter, Port Phillip hosted several events during the autumn season, including Citroen Annual Car Show 2025 (St Kilda), Cars and Culture (St Kilda), Circus Rio (Port Melbourne), Dawnbreak Sober Sunrise Silent Disco (Elwood) and The Bloody Long Walk 2025 (St Kilda). Collectively, these events generated an economic impact of **\$326, 998**.

- The Skyline Ferris Wheel was in Catani Gardens from 9 December 2024 until 17 February 2025 and in South Beach Reserve from 21 February to 18 May 2025, a total of **158** operational days. The total number of patrons for 2024/25 was **39,283**, a **15%** increase compared to 2023/24.
- The trimmed mean annual inflation was **2.7%** to the June quarter, down from **2.9%** to the December quarter. This is the lowest annual trimmed mean inflation rate since the December 2021 quarter. (ABS)
- The Victorian unemployment rate was **4.6%** in March, the highest of any state or territory. The national rate was **4.3%**. (ABS, seasonally adjusted)
- Monthly retail turnover saw Victoria record a **1.2%** rise in June 2025, a **0.6%** rise in May, and a **0.3%** decline in April. Australian retail turnover rose **1.2%** in June, **0.5%** in May and no change in April. (ABS, seasonally adjusted)

Municipal Economic Trends



Key categories for Visitors and Residents

What are the key changes to category spend and visits in June 2025 versus the past year and Metro VIC for the City of Port Phillip location?

| Data representing | | | | | | | | | |
|---|----------|-----------------------|-----------|----------|-----------------------|-----------|-----------|-----------------------|-----------|
| Spend | | | | | | | | | |
| Category | Total | | | Visitors | | | Residents | | |
| | Spend | % Change vs last year | | Spend | % Change vs last year | | Spend | % Change vs last year | |
| | | Spend location | Metro VIC | | Spend location | Metro VIC | | Spend location | Metro VIC |
| Total | \$156.6M | ↑ 6.5% | ↑ 2.5% | \$93.0M | ↑ 7.5% | ↑ 2.9% | \$63.6M | ↑ 5.1% | ↑ 2.1% |
| Food Retailing | \$51.4M | ↑ 3.7% | ↑ 3.4% | \$21.2M | ↑ 1.7% | ↑ 6.0% | \$30.2M | ↑ 5.1% | ↑ 2.2% |
| Supermarkets | \$33.9M | ↑ 5.8% | ↑ 4.3% | \$11.8M | ↑ 6.7% | ↑ 7.8% | \$22.1M | ↑ 5.4% | ↑ 2.9% |
| Groceries and Other Food Retailing | \$17.5M | ↓ -0.3% | ↑ 0.9% | \$9.4M | ↓ -3.9% | ↑ 2.5% | \$8.1M | ↑ 4.3% | ↓ -0.2% |
| Tourism and Entertainment | \$39.2M | ↑ 3.2% | ↑ 3.6% | \$26.5M | ↑ 1.8% | ↑ 3.0% | \$12.6M | ↑ 6.2% | ↑ 4.6% |
| Restaurants | \$16.2M | ↑ 12.0% | ↑ 10.2% | \$10.8M | ↑ 8.9% | ↑ 9.3% | \$5.4M | ↑ 18.7% | ↑ 11.8% |
| Pubs, Taverns and Bars | \$10.4M | ↑ 5.4% | ↑ 0.7% | \$7.2M | ↑ 5.4% | ↑ 0.5% | \$3.2M | ↑ 5.4% | ↑ 1.2% |
| Takeaway and Fast Food Outlets | \$5.3M | ↑ 3.6% | ↑ 2.0% | \$3.5M | ↑ 2.8% | ↑ 1.8% | \$1.9M | ↑ 5.2% | ↑ 2.1% |
| Cafes | \$4.9M | ↓ -9.6% | ↓ -2.2% | \$3.1M | ↓ -9.9% | ↓ -2.0% | \$1.9M | ↓ -9.2% | ↓ -2.6% |
| Attractions, Events and Recreation | \$2.2M | ↓ -26.1% | ↓ -3.0% | \$1.9M | ↓ -23.0% | ↓ -4.8% | \$242K | ↓ -44.3% | ↑ 3.4% |
| Breweries and Wineries | \$134K | ↑ 69.8% | ↓ -16.6% | \$109K | ↑ 67.0% | ↓ -18.6% | \$25K | ↑ 83.1% | ↓ -11.2% |
| Discretionary Retail | \$24.7M | ↓ -0.2% | ↑ 2.9% | \$15.4M | ↓ -2.2% | ↑ 2.4% | \$9.3M | ↑ 3.2% | ↑ 3.6% |
| Other Discretionary Retail | \$19.1M | ↑ 0.4% | ↑ 3.3% | \$11.2M | ↓ -1.1% | ↑ 2.4% | \$7.9M | ↑ 2.7% | ↑ 4.3% |
| Department Stores, Clothing & Accessories | \$5.6M | ↓ -2.5% | ↑ 1.8% | \$4.2M | ↓ -5.1% | ↑ 1.4% | \$1.4M | ↑ 5.8% | ↑ 2.5% |
| Private Transport | \$9.0M | ↑ 8.1% | ↓ -3.8% | \$6.1M | ↑ 13.3% | ↓ -3.1% | \$2.8M | ↓ -1.6% | ↓ -4.4% |
| Accommodation - Instore | \$1.5M | ↓ -1.8% | ↓ -1.0% | \$1.1M | ↓ -6.6% | ↓ -1.9% | \$336K | ↑ 18.7% | ↑ 3.7% |
| Accommodation - Online | \$978K | ↓ -26.6% | ↓ -19.6% | \$859K | ↓ -29.4% | ↓ -19.6% | \$119K | ↑ 3.3% | |

Spend is based on the aggregated spend within the category within the region. Customer count is the distinct number of customer who have transacted in the category within the region. Missing categories are due to a lack of sample size in the data. Past year spend is based on the same period last year. Source: Council iQ

Around the Precincts – Overview

| Precinct | Business | | | Vacancy Rate | Customer Requests | Footpath Trading Permits |
|----------------------------|--|---|---|-----------------------------|--|--|
| | Source: Council IQ | | | Source: CoPP vacancy audits | Source: OneCouncil | Source: CoPP FTP Data |
| | Total Spend (\$million) | Highest Retail Growth Category* | Top 5 source markets (visitor \$) | % | Number of requests & key categories | Total number of Footpath Trading Permits |
| Acland Street, St Kilda | Total: 54.32 Jun: 17.03 May: 18.59 Apr: 18.71 Previous: 62.82 | Apr & May: Private transport Jun: Groceries & other food retailing | Brighton Caulfield North Prahran-Windsor Elsternwick Caulfield South | 9.6** +3.3# | 165 (-55 [›]) Dumped rubbish Street/laneway cleaning Graffiti removal | 52 no change [›] |
| Fitzroy Street, St Kilda | Total: 18.30 Jun: 5.63 May: 6.18 Apr: 6.48 Previous: 22.66 | Apr & May: Pubs, Taverns & bars Jun: Discretionary retail | Prahran-Windsor Caulfield North South Yarra-North Brighton Southbank-East | 14.7 +8.2 | 424 (-46 [›]) Street/laneway cleaning Dumped rubbish Illegally parked vehicle | 43 -1 |
| Bay Street, Port Melbourne | Total: 58.01 Jun: 19.03 May: 20.11 Apr: 18.86 Previous: 58.39 | Apr: Accommodation May & Jun: Attractions, events & recreation | Docklands Southbank-East Brighton Newport Southbank-West | 7.1 -0.8 | 257 (-25 [›]) Street/laneway cleaning Dumped rubbish Illegally parked vehicle | 70 -5 |

| Precinct | Business | | | Vacancy Rate | Customer Requests | Footpath Trading Permits |
|-----------------------------------|--|---|---|--------------|---|--|
| | Total Spend (\$million) | Highest Retail Growth Category* | Top 5 source markets (visitor \$) | % | Number of requests & key categories | Total number of Footpath Trading Permits |
| Carlisle Street, Balaclava | Total: 40.01 Jun: 12.68 May: 14.37 Apr: 12.96 Previous: 41.50 | Apr, May & Jun: Department stores, clothing & accessories | Caulfield North Prahran-Windsor Caulfield South Elsternwick Brighton | 11.4 -0.3 | 225 (-7) Street/laneway cleaning Dumped rubbish Graffiti removal | 54 -1 |
| Clarendon Street, South Melbourne | Total: 67.53 Jun: 22.94 May: 23.63 Apr: 20.96 Previous: 69.65 | Apr, May & Jun: Department stores, clothing & accessories | Southbank-East Southbank-West Docklands South Yarra-West Melbourne CBD-West | 6.9 -3.1 | 127 (-34) Building & maintenance Dumped rubbish Illegally parked vehicle | 63 no change |

Notes:

*Compared to previous year

** As at June 2025

Increase or decrease compared to December 2024

> Increase or decrease compared to previous quarter



HELLO HARRY

The Burger Joint

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LIVE TOBACCONIST

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HELLO
HARRY

CHEF

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KILLERAT
RANDOM

HAPPY HARRY
\$5 SHAKES
\$6 SCHOONER
\$10 COCKTAILS

HELLO HARRY

The Burger Joint

Acland Street, St Kilda

Acland Street, St Kilda

| Business | | | Vacancy Rate | Customer Requests | Footpath Trading Permits |
|--|---|--|------------------------------------|--|--|
| <i>Source: Council IQ</i> | | <i>Source: Council IQ</i> | <i>Source: CoPP vacancy audits</i> | <i>Source: OneCouncil (including Snap, Send Solve)</i> | <i>Source: CoPP City Permits team</i> |
| Total Spend (\$million) | Highest Retail Growth Category* | Top 5 Source Markets (visitor \$) | % | Number of requests & key categories | Total number of Footpath Trading Permits |
| Total: 54.32 Jun: 17.03 May: 18.59 Apr: 18.71 Previous: 62.82 | Apr & May: Private transport Jun: Groceries & other food retailing | Brighton Caulfield North Prahran-Windsor Elsternwick Caulfield South | 9.6** +3.3# | 165 (-55') Dumped rubbish Street/laneway cleaning Graffiti removal | 52 no change' |

Notes:

*Compared to previous year

** As at June 2025

Increase or decrease compared to December 2024

> Increase or decrease compared to previous quarter

Council permitted events

- Annual Car Show (Citroen Car Club), approximately **500** attendees on the day in O'Donnell Gardens. No food or beverage offering encouraged patrons to use existing traders.
Total attend expenditure impact: **\$42,900**
- Cars and Culture, their first event in St Kilda Triangle Car Park. Approximately **2,000** attendees with minimal food or beverage offering to encourage patrons to use existing traders.
Total attend expenditure impact: **\$171,600**
- The Bloody Long Walk, which finished at South Beach Reserve. Approximately **1,800** attendees, although the afternoon was impacted by protest activity
Total attend expenditure impact: **\$15,440**

2025 quarterly total for the precinct: **\$229,940**

All figures provided are estimates of spend. A formula for the different type of events has been provided by Culture Counts and numbers of attendees are used to calculate an estimate of total expenditure impact.





Fitzroy Street, St Kilda

Fitzroy Street, St Kilda

| Business | | | Vacancy Rate | Customer Requests | Footpath Trading Permits |
|---|---|---|-------------------------------|---|--|
| Source: Council IQ | | Source: Council IQ | Source: CoPP vacancy audits | Source: OneCouncil (including Snap, Send Solve) | Source: CoPP City Permits team |
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Notes:
*Compared to previous year
** As at June 2025
Increase or decrease compared to December 2024
> Increase or decrease compared to previous quarter

Council permitted events

- Fitzroy Street Foodie Fare, monthly market run by the Fitzroy Street Business Association in April, May and June (numbers not provided)
- Around the World in One Day: Long Lunch Edition, restaurant crawl along Fitzroy Street. Delivered by the Fitzroy Street Business Association in May (numbers not provided)





BABA'S DELI



Bay Street, Port Melbourne

Bay Street, Port Melbourne

| Business | | | Vacancy Rate | Customer Requests | Footpath Trading Permits |
|--|---|--|--|--|--|
| <i>Source: Council IQ</i> | | | <i>Source: Council IQ</i> | <i>Source: CoPP vacancy audits</i> | <i>Source: OneCouncil (including Snap, Send Solve)</i> |
| <i>Source: Council IQ</i> | <i>Source: Council IQ</i> | <i>Source: CoPP vacancy audits</i> | <i>Source: OneCouncil (including Snap, Send Solve)</i> | <i>Source: CoPP City Permits team</i> | |
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** As at June 2025

Increase or decrease compared to December 2024

> Increase or decrease compared to previous quarter

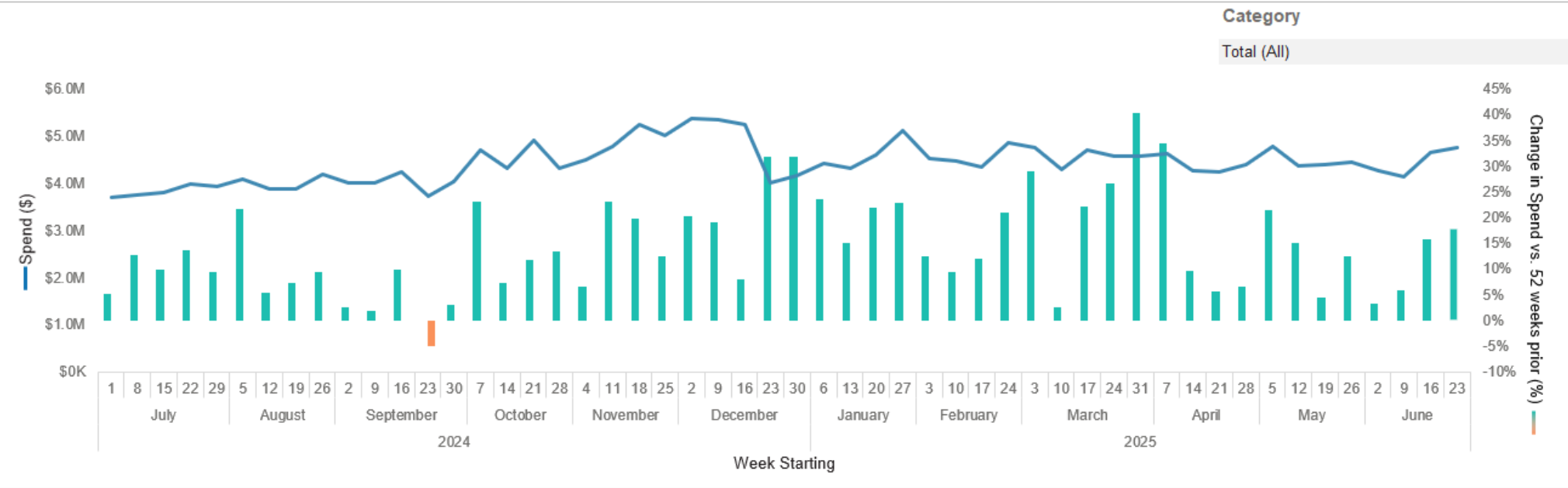
Council permitted events

- No event permits were issued for Bay Street, Port Melbourne
- Permitted events in proximity to Bay Street:
 - Port Melbourne Anzac Day Commemoration Service, Beach Street, approximately **3,000** attendees
 - Circus Rio, JL Murphy Reserve, approximately **450** attendees in June, total attend expenditure impact: **\$38,610**

All figures provided are estimates of spend. A formula for the different type of events has been provided by Culture Counts and numbers of attendees are used to calculate an estimate of total expenditure impact.

Trends

How much spend is going to businesses in the Bay Street - Port Melbourne location over time?



Data is up to last complete Monday to Sunday week. Source Council IQ



Carlisle Street, Balaclava

Carlisle Street, Balaclava

| Business | | | Vacancy Rate | Customer Requests | Footpath Trading Permits |
|---|--|--|--------------------|--|---|
| Source: Council IQ | | | Source: Council iQ | Source: CoPP vacancy audits | Source: OneCouncil (including Snap, Send Solve) |
| Total Spend (\$million) | Highest Growth Category* | Top 5 source markets (visitor \$) | % | Number of requests & key categories | Total number of Footpath Trading Permits |
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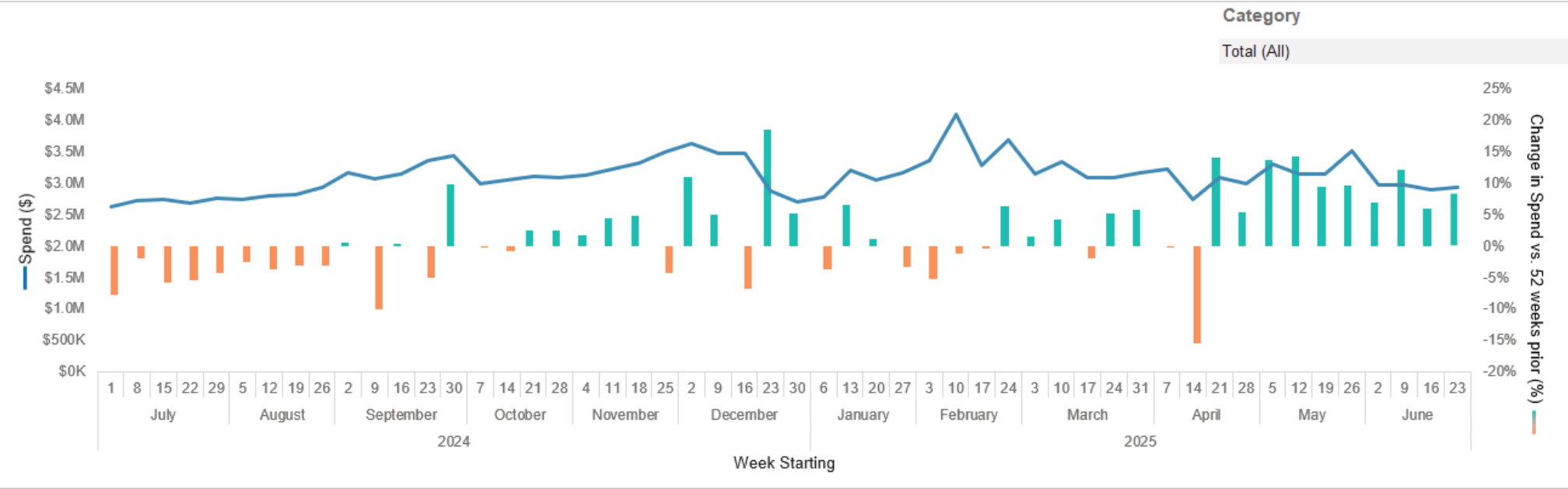
Notes:
*Compared to previous year
** As at June 2025
Increase or decrease compared to December 2024
> Increase or decrease compared to previous quarter

Council permitted events

- En Masse, a projection installation, featuring Rawcus Ensemble, on the exterior of the St Kilda Library (numbers not provided)

Trends

How much spend is going to businesses in the Carlisle Street - Balaclava location over time?



Data is up to last complete Monday to Sunday week. Source Council iQ



Clarendon Street, South Melbourne

Clarendon Street, South Melbourne

| Business | | | Vacancy Rate | Customer Requests | Footpath Trading Permits |
|--|---|---|------------------------------|--|---|
| Source: Council IQ | | | Source: Council IQ | Source: CoPP vacancy audits | Source: OneCouncil (including Snap, Send Solve) |
| Source: CoPP City Permits team | | | | | |
| Total Spend (\$million) | Highest Growth Category* | Top 5 source markets (visitor \$) | % | Number of requests & key categories | Total number of Footpath Trading Permits |
| Total: 67.53 Jun: 22.94 May: 23.63 Apr: 20.96 Previous: 69.65 | Apr, May & Jun: Department stores, clothing & accessories | Southbank-East Southbank-West Docklands South Yarra-West Melbourne CBD-West | 6.9** -3.1# | 127 (-34>) Building & maintenance Dumped rubbish Illegally parked vehicle | 63 no change> |

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** As at June 2025
Increase or decrease compared to December 2024
> Increase or decrease compared to previous quarter

Council permitted events

- Permits were issued for several small events in and around the South Melbourne Market area, such as the Vinnies CEO Sleepout (numbers not provided)

Trends

How much spend is going to businesses in the Clarendon Street - South Melbourne location over time?



Data is up to last complete Monday to Sunday week. Source Council iQ