



Quarterly Precinct Health Report

Edition 4

January – March 2025



portphillip.vic.gov.au





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99a Carlisle Street
St Kilda VIC 3182

Phone: **ASSIST** 03 9209 6777

Email: portphillip.vic.gov.au/contact-us

Website: portphillip.vic.gov.au

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Municipal Economic Overview



Resident Spend

Source: Council IQ

What residents are spending on?

Total Spend:

\$1,100.04 million

spent by CoPP residents between
Jan – Mar 2025

Quarterly change: **-\$58.6M**

Year on year: **+32.08M**

Highest Spend Categories:

Supermarkets (**\$116.71M**)

Other discretionary retail (**\$101.35M**)

Department stores, clothing and accessories
(**\$70.7M**)

Highest Spend Growth
Categories (vs 2024)

Fitness (Jan)

Pet care (Feb/ Mar)



Business Spend

Source: Council IQ

Resident and visitor spend within
the City of Port Phillip

Total Spend:

\$508.95 million

Quarterly change: **-\$10.27M**

Year on year: **+25.94M**

Highest Spend Category:

Supermarkets (**\$105.95M**)

Highest Spend Growth
Categories (vs 2024)

Accommodation (Jan)

Department stores, clothing and
accessories (Feb)

Other discretionary retail (Mar)



Event Permits

Source: CoPP Events department

Number of permits issued:

133

Category

- Community: **30**
- General: **36**
- Major: **12**
- Market: **9**
- Minor: **37**
- Promotional: **3**
- Street stall: **6**

Ward

- Albert Park: **31**
- Alma: **4**
- Balaclava: **4**
- Elwood: **13**
- Lakeside: **0**
- Montague: **8**
- Port Melbourne: **3**
- South Melbourne: **13**
- St Kilda: **57**
- Multiple:



Customer Requests

Source: OneCouncil (including Snap, Send Solve)
Figures in parentheses are previous quarter

Number of requests in precincts:

1,365

(previous quarter: 1,151)

Highest reported issues:

Dumped rubbish: **132** (113)
Street & laneway cleaning: **109** (88)
Graffiti removal: **111** (65)

Highest reported precinct:

Fitzroy Street **470** (360)



Footpath Trading Permits

Source: CoPP City Permits team
Figures in parentheses are a comparison to previous quarter

Total number of permits:

669 (+23)

Outdoor dining: 434 (+17) / 65% (0%)

Number of new approved permits:

34 (-10)

Outdoor dining: 23 (-2) / 68% (+11%)

Total number of parklets:

43 (-1)



Number of Businesses

Source: Australian Business Register. ©2024 Compiled and presented in economy.id by .id (informed decisions)

The number of GST registered businesses increased by **2** in the December 2024 quarter – **463** new GST registrations and 461 cancellations.

For the September 2024 quarter the number of GST registered businesses increased by **86 – 737** new GST registrations and 651 cancellations.

Commentary

- Most hospitality sectors in Port Phillip are continuing to trade well despite a challenging environment and low consumer confidence. For the months January to March 2025, compared to 2024, spend per customer and customer count have increased for restaurants. Spend per customer is down for pubs, taverns and bars, but this is offset by an increase in customers, resulting in an overall increase in spend. Both customer count and spend per customer have decreased for cafes.
- The decline in café spend and number of customers can be attributed to the rise of hybrid work and high living costs. More employees are working at least some of their time from home, have cut back on the takeaway coffee and take their own lunch when they do go to the office. Transactions data from digital payments platform Square shows the number of purchases at food and drink businesses between 7am and 11am on weekdays has dropped to below pre-pandemic levels. It appears that consumers are cutting back on nonessential purchases, but still spending on things that are important to them, like dining with friends and family.

- This quarter, Port Phillip hosted several events during the peak summer season, including St Kilda Blues Fest, Pride March, and other major events. Collectively (excluding St Kilda Festival), these events generated an economic impact of **\$48,814,300**. Compared to the previous summer events season, this represents an increase of **110%**.
- The trimmed mean annual inflation was **2.9%** in the March quarter, down from **3.3%** in the December quarter. This is the lowest annual trimmed mean inflation rate since the December 2021 quarter. (ABS)
- The Victorian unemployment rate was **4.4%** in March, the highest of any state or territory. The national rate was **4.1%**. (ABS, seasonally adjusted)
- Monthly retail turnover saw Victoria record a **0.6%** rise in March 2025, no change for February, and a **0.8%** rise in January. Australian retail turnover rose **0.3%** in March, **0.2%** in February and **0.4%** in January. (ABS, seasonally adjusted)

Municipal Economic Trends



Key categories for Visitors and Residents

What are the key changes to category spend and visits in March 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	\$183.3M	↑ 6.4%	↑ 1.5%	\$113.7M	↑ 9.4%	↑ 2.0%	\$69.6M	↑ 1.9%	↑ 1.0%
Food Retailing	\$56.8M	↑ 0.7%	↑ 0.6%	\$23.7M	↓ -0.8%	↑ 1.7%	\$33.1M	↑ 1.8%	→ 0.0%
Supermarkets	\$37.5M	↑ 4.0%	↑ 1.8%	\$13.1M	↑ 3.2%	↑ 3.8%	\$24.4M	↑ 4.5%	↑ 1.0%
Groceries and Other Food Retailing	\$19.3M	↓ -5.2%	↓ -2.7%	\$10.6M	↓ -5.4%	↓ -2.1%	\$8.6M	↓ -5.0%	↓ -3.1%
Tourism and Entertainment	\$49.3M	↓ -0.6%	↑ 3.6%	\$35.2M	↓ -1.4%	↑ 3.3%	\$14.0M	↑ 1.7%	↑ 4.1%
Restaurants	\$20.7M	↑ 8.6%	↑ 9.1%	\$14.3M	↑ 6.3%	↑ 8.8%	\$6.4M	↑ 14.2%	↑ 9.6%
Pubs, Taverns and Bars	\$11.9M	↑ 1.0%	↑ 1.6%	\$8.6M	↑ 2.3%	↑ 1.7%	\$3.4M	↓ -2.1%	↑ 1.3%
Takeaway and Fast Food Outlets	\$7.2M	↓ -1.8%	↑ 2.1%	\$5.1M	↓ -4.0%	↑ 2.3%	\$2.1M	↑ 3.9%	↑ 1.8%
Cafes	\$5.3M	↓ -10.5%	↓ -1.9%	\$3.4M	↓ -7.6%	↓ -2.4%	\$1.8M	↓ -15.5%	↓ -1.1%
Discretionary Retail	\$28.1M	↑ 8.3%	↑ 2.0%	\$18.4M	↑ 11.1%	↑ 1.9%	\$9.7M	↑ 3.4%	↑ 2.2%
Other Discretionary Retail	\$22.7M	↑ 10.4%	↑ 2.3%	\$14.3M	↑ 14.8%	↑ 1.6%	\$8.4M	↑ 3.7%	↑ 3.0%
Department Stores, Clothing & Accessories	\$5.3M	↑ 0.1%	↑ 1.4%	\$4.0M	↓ -0.4%	↑ 1.8%	\$1.3M	↑ 1.6%	↑ 0.6%
Private Transport	\$12.5M	↑ 8.0%	↓ -5.4%	\$9.2M	↑ 12.9%	↓ -5.9%	\$3.3M	↓ -3.4%	↓ -5.0%
Accommodation - Online	\$2.3M	↓ -11.1%	↓ -13.3%	\$2.1M	↓ -14.9%	↓ -13.3%	\$230K	↑ 46.4%	
Accommodation - Instore	\$1.9M	↓ -0.3%	↓ -10.1%	\$1.5M	↓ -0.6%	↓ -11.6%	\$335K	↑ 1.2%	↓ -0.6%

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
<i>Source: Council IQ</i>		<i>Source: CoPP vacancy audits</i>		<i>Source: OneCouncil</i>	<i>Source: CoPP FTP Data</i>	
	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: 64.88 Mar: 22.36 Feb: 20.80 Jan: 21.72 Previous: 66.43	Jan, Feb & Mar: Private Transport	Prahran-Windsor Caulfield North Brighton Elsternwick Caulfield South	6.3** -4.1#	220 (+32>) Graffiti removal Dumped rubbish Street/laneway cleaning	52 +4>
Fitzroy Street, St Kilda	Total: 19.41 Mar: 6.90 Feb: 6.37 Jan: 6.15 Previous: 18.30	Jan & Mar: Discretionary Retail Feb: Pubs, Taverns & Bars	Prahran-Windsor South Yarra – North Brighton Caulfield North Southbank-East	6.5 -5.5	470 (+110>) Dumped rubbish Street/laneway cleaning Graffiti removal	44 +2
Bay Street, Port Melbourne	Total: 56.64 Mar: 20.02 Feb: 17.66 Jan: 18.96 Previous: 60.21	Jan & Mar: Pubs, Taverns & Bars Feb: Attractions, Events & Recreation	Docklands Southbank-East Brighton Newport Southbank-West	7.9 -2	282 (+38>) Dumped rubbish Missed bins Planning permit non-compliance	75 +1

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: 40.22 Mar: 13.72 Feb: 13.9 Jan: 12.59 Previous: 40.89	Jan: Pubs, Taverns & Bars Feb: Attractions, Events & Recreation Mar: Private Transport	Caulfield North Prahran-Windsor Caulfield South Elsternwick Brighton	11.7 +0.7	232 (+33) Street/laneway cleaning Dumped rubbish Graffiti removal	55 +2
Clarendon Street, South Melbourne	Total: 66.91 Mar: 22.23 Feb: 22.04 Jan: 22.64 Previous: 60.0	Jan & Feb: Pubs, Taverns & Bars Mar: Supermarkets	Southbank-East Southbank-West Docklands South Yarra-West Melbourne CBD-West	10 -3.8	161 (+1) Building & maintenance Illegally parked vehicle Street/parking signs	63 +2

Notes:

*Compared to previous year

** As at December 2024

Increase or decrease compared to June 2024

> Increase or decrease compared to previous quarter



HELLO HARRY

The Burger Joint

buddha culture

LIVE TOBACCONIST

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HELLO HARRY

CHEF

METHOD .50M

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: Council IQ</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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Notes:

*Compared to previous year

** As at December 2024

Increase or decrease compared to June 2024

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Council permitted events

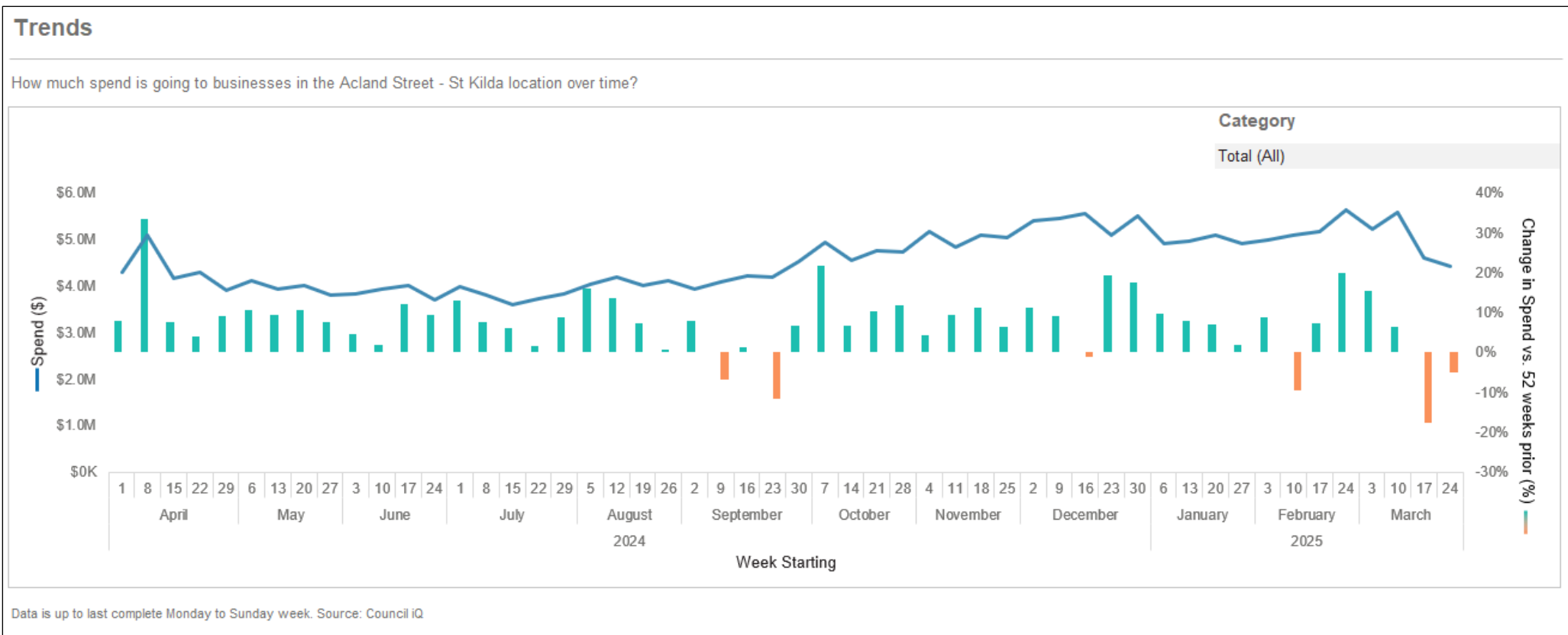
- St Kilda Festival, approximately **350,000** attendees over the weekend in Acland Street and Fitzroy Street
Total attend expenditure impact still being analysed
- 8 nights of Palace Foreshore, live music programmed with approximately **35,000** attendees across the shows
Total attend expenditure impact: **\$11,621,400**
- St Kilda Blues Fest, **45,000** over the weekend, live music programming in Fitzroy Street and Acland Street
Total attend expenditure impact: **\$14,941,800**
- Sunset Cinema in the St Kilda Botanical Gardens, approximately **7500** attendees over the month
Total attend expenditure impact: **\$1,024,950**
- Big Sculpture Trail (numbers not provided)

- Latin Festival **14,000** people in attendance
Total attend expenditure impact: **\$1,913,240**
- Summer Jam **6,000** people in attendance
Total attend expenditure impact: **\$467,580**

2025 total for the precinct (excluding St Kilda Festival): **\$29,968,970**

2024 total for the precinct (excluding St Kilda Festival): **\$5,496,230**

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
<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: 19.41 Mar: 6.90 Feb: 6.37 Jan: 6.15 Previous: 18.30	Jan & Mar: Discretionary Retail Feb: Pubs, Taverns & Bars	Prahran–Windsor South Yarra–North Brighton Caulfield North Southbank–East	6.5** -5.5#	470 (+110>) Dumped rubbish Street/laneway cleaning Graffiti removal	44 +2>

Notes:

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** As at December 2024

Increase or decrease compared to June 2024

> Increase or decrease compared to previous quarter

Council permitted events

- St Kilda Festival, approximately **350,000** attendees over the weekend in Fitzroy Street and Acland Street
Total attend expenditure impact still being analysed
- Pride March, approximately **28,000** in attendance including marches and spectators
Total attend expenditure impact: **\$2,402,400**
- Beerfest, **4994** attendees
Total attend expenditure impact: **\$682,480**
- St Kilda Blues Fest: **45,000** over the weekend, live music programming in Fitzroy Street and Acland Street
Total attend expenditure impact: **\$14,941,800**

- Trial of Last Laps Live with Grand Prix, programming of live music in venues
- 2XU Triathlon series race 3 and 5 (5,000 people)
Total attend expenditure impact: **\$389,650**
- Big Sculpture Trail (numbers not provided)

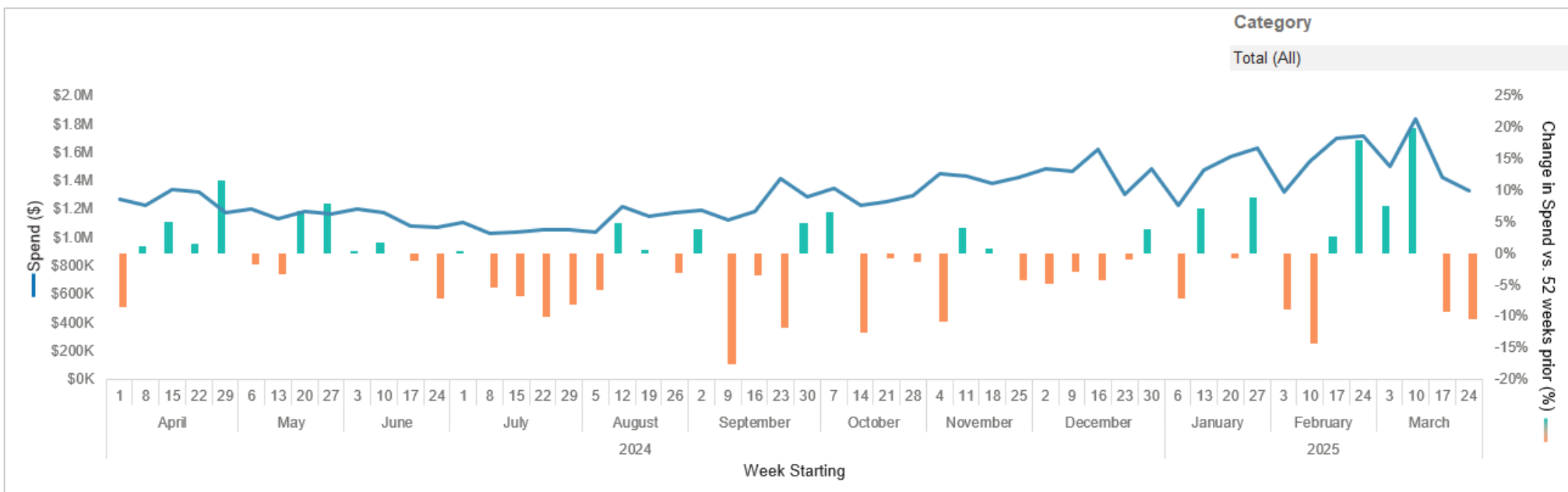
2025 total for the precinct (excluding St Kilda Festival): **\$18,416,330**

2024 total for the precinct (excluding St Kilda Festival): **\$17,576,000**

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 Fitzroy Street - St Kilda location over time?



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



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Bay Street, Port Melbourne

Bay Street, Port 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: 56.64 Mar: 20.02 Feb: 17.66 Jan: 18.96 Previous: 60.21	Jan & Mar: Pubs, Taverns & Bars Feb: Attractions, Events & Recreation	Docklands Southbank-East Brighton Newport Southbank-West	7.9** -2#	282 (+38') Dumped rubbish Missed bins Planning permit non-compliance	75 +1'

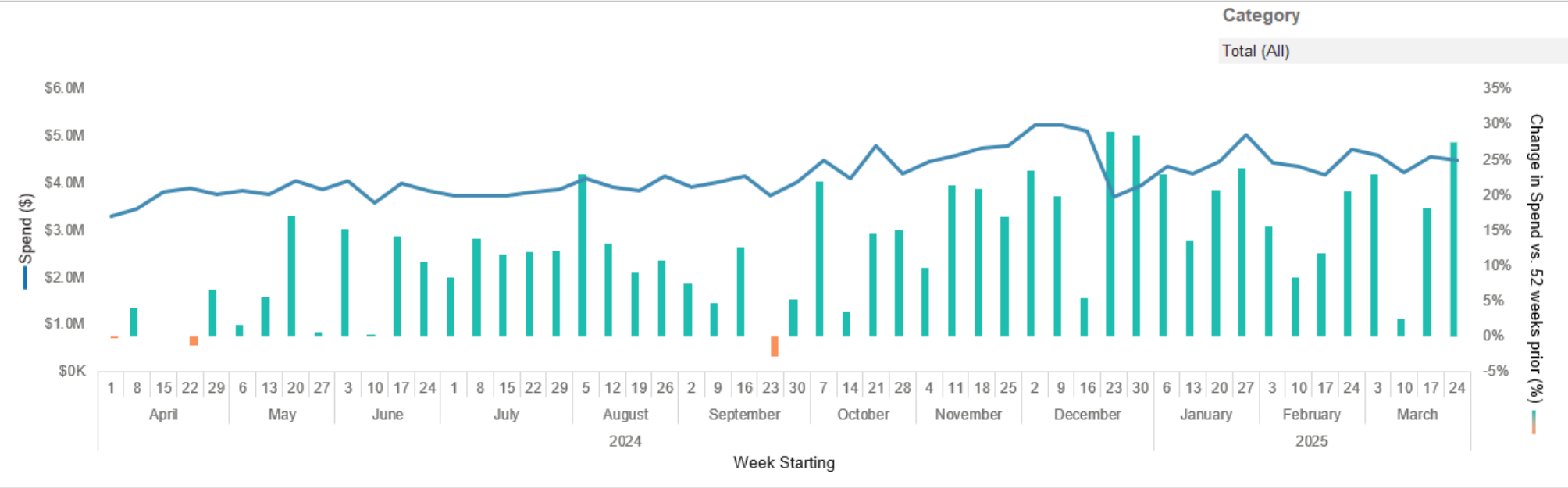
Notes:
*Compared to previous year
** As at December 2024
Increase or decrease compared to June 2024
> Increase or decrease compared to previous quarter

Council permitted events

- No event permits were issued for Bay Street, Port Melbourne

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)
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: 40.22 Mar: 13.72 Feb: 13.9 Jan: 12.59 Previous: 40.89	Jan: Pubs, Taverns & Bars Feb: Attractions, Events & Recreation Mar: Private Transport	Caulfield North Prahran-Windsor Caulfield South Elsternwick Brighton	11.7** +0.7#	232 (+33') Street/laneway cleaning Dumped rubbish Graffiti removal	55 +2'

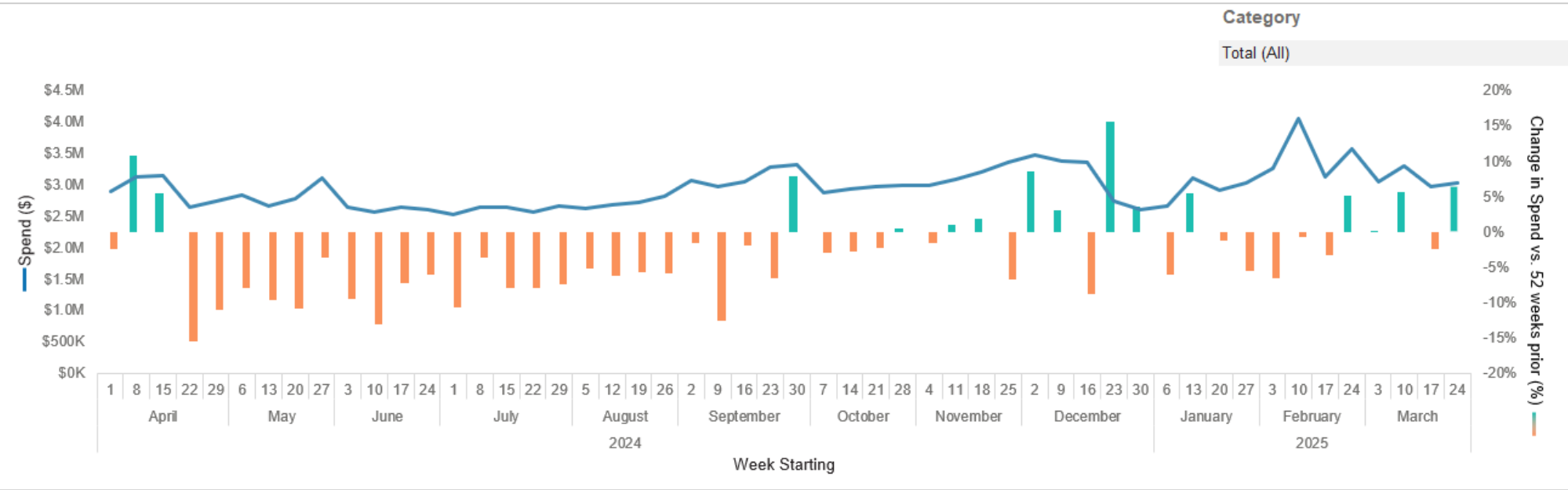
Notes:
*Compared to previous year
** As at December 2024
Increase or decrease compared to June 2024
> Increase or decrease compared to previous quarter

Council permitted events

- Australia Day Long Weekend Street Music (numbers not provided)
- Carnivale on Carlisle (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 3 source markets (visitor \$)	%	Number of requests & key categories	Total number of Footpath Trading Permits
Total: 66.91 Mar: 22.23 Feb: 22.04 Jan: 22.64 Previous: 60.0	Jan & Feb: Pubs, Taverns & Bars Mar: Supermarkets	Southbank-East Southbank-West Docklands South Yarra-West Melbourne CBD-West	10** -3.8#	161 (+1>) Building & maintenance Illegally parked vehicle Street/parking signs	63 +2

Notes:
*Compared to previous year
** As at December 2024
Increase or decrease compared to June 2024
> Increase or decrease compared to previous quarter

Council permitted events

- Porsche and Coffee event in South Melbourne, **5000** people in attendance
Total attend expenditure impact: **\$429,000**
- South Melbourne Market Mussel and Jazz Festival
- Emerald Hill Library Open Day
- Trial of Last Laps Live with Grand Prix, programming of live music in venues (numbers not provided)

2025 total for the precinct: **\$429,000**
2024 total for the precinct: **\$128,700**

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.

