



Quarterly Precinct Health Report

Edition 6

July – September 2025



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Municipal Economic Overview



Resident Spend

Source: Council IQ

Total resident spend (within and outside the City of Port Phillip)

Total Spend:
\$1,149.77 million

spent by CoPP residents between
Apr – Jun 2025
Quarterly change: **+\$29.67M / +2.65%**
Year on year: **+\$77.82M / +7.26%**

Highest Spend Categories:
Supermarkets (**\$112.58M**)
Other discretionary retail (**\$103.84M**)
Department stores, clothing and accessories (**\$78.10M**)

Highest Spend Growth
Categories (vs 2024)
Electricity, gas and water (September)
Computer services (August)
Breweries and wineries (July)



Business Spend

Source: Council IQ

Resident and visitor spend within the City of Port Phillip

Total Spend:
\$496.11 million
Quarterly change: **+\$7.06M / +1.44%**
Year on year: **+\$36.66M / +7.98%**

Highest Spend Category:
Supermarkets (**\$102.29M**)
Other discretionary retail (**\$59.04M**)
Groceries and other food retailing (**\$54.35M**)

Highest Spend Growth
Categories (vs 2024)
Takeaway and Fast-food (September)
Breweries and wineries (July and August)



Event Permits

Source: CoPP Events department

Number of permits issued:
58 (previous quarter: 89; Q1 2024/25: 59)

- Category
- Community: 13
 - General: 17
 - Major: 3
 - Market: 6
 - Minor: 7
 - Promotional: 2
 - Street stall: 10

- Ward
- Albert Park: 7
 - Alma: 1
 - Balaclava: 3
 - Elwood: 1
 - Lakeside: 0
 - Montague: 6
 - Port Melbourne: 0
 - South Melbourne: 8
 - St Kilda: 32
 - Multiple: 0

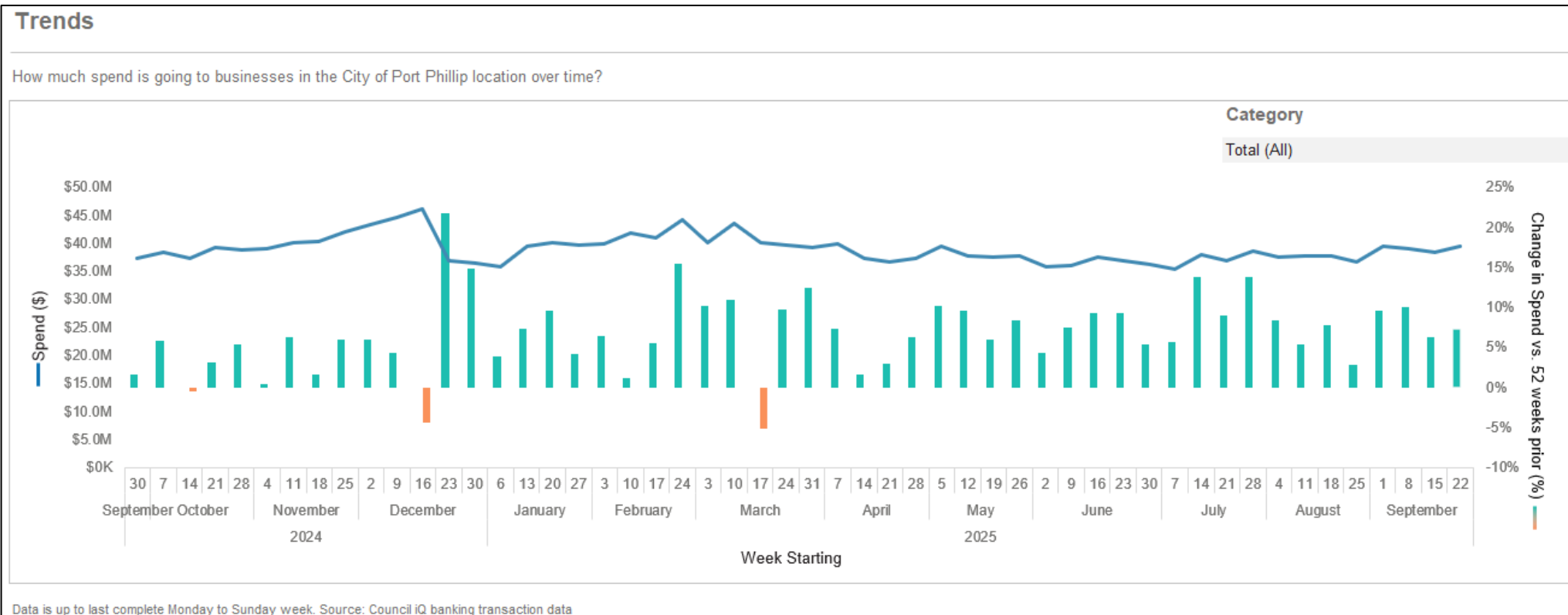
 Customer Requests	 Footpath Trading Permits	 Number of Businesses
Source: OneCouncil (including Snap, Send Solve) Figures in parentheses are previous quarter Number of requests in precincts: 1,294 (previous quarter: 1,198) Highest reported issues: Street & laneway cleaning: 168 (142) Dumped rubbish: 134 (124) Illegally parked vehicle: 77 (61) Highest reported precinct: Fitzroy Street 424 (424)	Source: CoPP City Permits team Figures in parentheses are a comparison to previous quarter Total number of permits: 654 (-12) Outdoor dining: 438 (+3) / 65% (+2%) Number of new approved permits: 26 (-8) Outdoor dining: 19 (-6) / 73% (-1%) Total number of parklets: 46 (+2)	Source: Australian Business Register. ©2024 Compiled and presented in economy.id by .id (informed decisions) The number of GST registered businesses increased by 85 in the March 2025 quarter – 501 new GST registrations and 416 cancellations. For the December 2024 quarter the number of GST registered businesses increased by 18 – 472 new GST registrations and 454 cancellations. Note: Methodological changes to filters of datasets will sometimes occur, resulting in revisions to published business counts.

Commentary

- Visa has released its Australia Night-time Economy Index 2025 which ranks 88 metro, regional and suburban areas on vibrancy, safety, accessibility and policy support. Melbourne-Inner is Australia’s **#1** night-time hotspot, earning the highest Vibe Score (**82.0**), covering key precincts including the CBD’s laneway bars and late-night dining, Brunswick’s multicultural Sydney Road, Fitzroy’s eclectic pubs, Chapel Street’s nightlife strip, and **St Kilda’s live music scene**.
- The night-time economy as a percentage of total day/night spend for Port Phillip in September 2025 was **24.5%**. The highest ranked precinct was Fitzroy Street (**57.3%**), followed by Acland Street (**31.7%**), Clarendon Street (**26%**), Carlisle Street (**22.3%**) and Bay Street (**20.4%**).
- This quarter, Port Phillip hosted several events during the winter season, the largest included Father’s Day Car and Bike Show (St Kilda), Sri Krishna Janmashtami celebration (Albert Park), Connor’s Run (St Kilda) and Cars and Culture (St Kilda). Collectively (excluding Sri Krishna Janmashtami), these events generated an economic impact of **\$3,182,085**.

- The trimmed mean annual inflation was **3%** to the September quarter, up from **2.7%** to the June quarter. This is the first time trimmed mean annual inflation has increased since December 2022. (ABS)
- The Victorian unemployment rate was **4.7%** in September, the highest of any state or territory. The national rate was **4.5%**. (ABS, seasonally adjusted)
- Job vacancies rose in five of the eight states and territories over the quarter to August 2025. Victoria had the biggest fall of **-8.8%**. Nationally, job vacancies fell **2.7%**. (ABS, seasonally adjusted)
- Household spending saw Victoria record a **0.5%** rise in July 2025, a **0.3%** rise in August, and a **0.3%** decline in September. Australian household spending rose **0.4%** in July, was flat in August and rose **0.2%** in September. (ABS, current price, seasonally adjusted)

Municipal Economic Trends



Key categories for Visitors and Residents

What are the key changes to category spend and visits in September 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	\$166.2M	↑ 6.9%	↑ 3.9%	\$100.0M	↑ 8.6%	↑ 4.7%	\$66.2M	↑ 4.5%	↑ 3.2%
Food Retailing	\$51.2M	↑ 0.4%	↑ 2.3%	\$21.0M	↓ -1.8%	↑ 4.9%	\$30.2M	↑ 2.0%	↑ 1.1%
Supermarkets	\$33.6M	↑ 2.4%	↑ 1.9%	\$11.9M	↑ 3.3%	↑ 4.9%	\$21.7M	↑ 2.0%	↑ 0.7%
Groceries and Other Food Retailing	\$17.6M	↓ -3.4%	↑ 3.5%	\$9.2M	↓ -7.7%	↑ 4.7%	\$8.4M	↑ 1.9%	↑ 2.6%
Tourism and Entertainment	\$43.8M	↑ 6.2%	↑ 7.1%	\$30.3M	↑ 4.9%	↑ 7.3%	\$13.5M	↑ 9.3%	↑ 6.8%
Restaurants	\$17.8M	↑ 9.6%	↑ 9.0%	\$12.1M	↑ 7.6%	↑ 8.7%	\$5.7M	↑ 13.9%	↑ 9.6%
Pubs, Taverns and Bars	\$11.0M	↓ -0.8%	↑ 2.6%	\$7.6M	↓ -2.9%	↑ 2.2%	\$3.4M	↑ 4.5%	↑ 3.2%
Takeaway and Fast Food Outlets	\$6.4M	↑ 21.7%	↑ 9.7%	\$4.2M	↑ 20.1%	↑ 10.6%	\$2.1M	↑ 25.0%	↑ 8.6%
Cafes	\$5.1M	↓ -5.4%	↓ -1.1%	\$3.1M	↓ -6.1%	↑ 0.4%	\$2.0M	↓ -4.2%	↓ -3.2%
Attractions, Events and Recreation	\$3.4M	↑ 7.5%	↑ 12.0%	\$3.1M	↑ 9.8%	↑ 12.2%	\$329K	↓ -10.1%	↑ 11.5%
Breweries and Wineries	\$126K	↑ 19.1%	↓ -23.3%	\$100K	↑ 13.1%	↓ -30.1%	\$26K	↑ 49.3%	↓ -3.7%
Discretionary Retail	\$25.2M	↑ 2.2%	↑ 4.8%	\$15.9M	↑ 1.2%	↑ 4.4%	\$9.3M	↑ 3.9%	↑ 5.4%
Other Discretionary Retail	\$20.1M	↑ 5.3%	↑ 5.6%	\$12.0M	↑ 5.9%	↑ 5.5%	\$8.2M	↑ 4.4%	↑ 5.8%
Department Stores, Clothing & Accessories	\$5.1M	↓ -8.5%	↑ 3.8%	\$3.9M	↓ -10.9%	↑ 3.3%	\$1.2M	↑ 0.8%	↑ 5.0%
Private Transport	\$8.7M	↑ 7.0%	↓ -0.7%	\$5.8M	↑ 9.0%	↓ -1.4%	\$2.9M	↑ 3.1%	→ 0.0%
Accommodation - Instore	\$1.7M	↓ -2.0%	↑ 3.4%	\$1.4M	↓ -2.4%	↑ 2.0%	\$343K	↓ -0.6%	↑ 11.3%
Accommodation - Online	\$1.4M	↓ -4.6%	↓ -12.5%	\$1.1M	↓ -12.0%	↓ -12.5%	\$202K	↑ 81.0%	

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 banking transaction data

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: 53.58 Sep: 17.82 Aug: 18.29 Jul: 17.48 Previous: 54.65	Jul & Aug: Accommodation Sep: Supermarkets	Prahran-Windsor Caulfield North Brighton Elsternwick Caulfield South	9.6** +3.3[#]	218 (+53[›]) Dumped rubbish Graffiti removal Street/laneway cleaning	53 +1[›]
Fitzroy Street, St Kilda	Total: 18.39 Sep: 6.19 Aug: 6.16 Jul: 6.05 Previous: 18.41	Jul & Aug: Accommodation Sep: Pubs, taverns & bars	Prahran-Windsor South Yarra-North Caulfield North Brighton Southbank-East	14.7 +8.2	424 (no change[›]) Street/laneway cleaning Dumped rubbish Graffiti removal	44 +1
Bay Street, Port Melbourne	Total: 56.68 Sep: 18.58 Aug: 19.20 Jul: 18.90 Previous: 58.80	Jul: Takeaway & fast-food Aug: Attractions, events & recreation Sep: Accommodation	Docklands Southbank-East Brighton Newport Southbank-West	7.1 -0.8	265 (+8[›]) Street/laneway cleaning Dumped rubbish Illegally parked vehicle	68 -2

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	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: 41.10 Sep: 14.91 Aug: 13.50 Jul: 12.69 Previous: 40.19	Jul & Aug: Department stores, clothing & accessories Sep: Attractions, events & recreation	Caulfield North Prahran-Windsor Caulfield South Elsternwick Brighton	11.4 -0.3	222 (-3) Street/laneway cleaning Dumped rubbish Illegally parked vehicle	55 +1
Clarendon Street, South Melbourne	Total: 71.13 Sep: 23.08 Aug: 24.64 Jul: 23.42 Previous: 66.50	Jul, Aug & Sep: Department stores, clothing & accessories	Southbank-East Southbank-West Docklands South Yarra-West Melbourne CBD-West	6.9 -3.1	165 (+38) Street/laneway cleaning 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

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

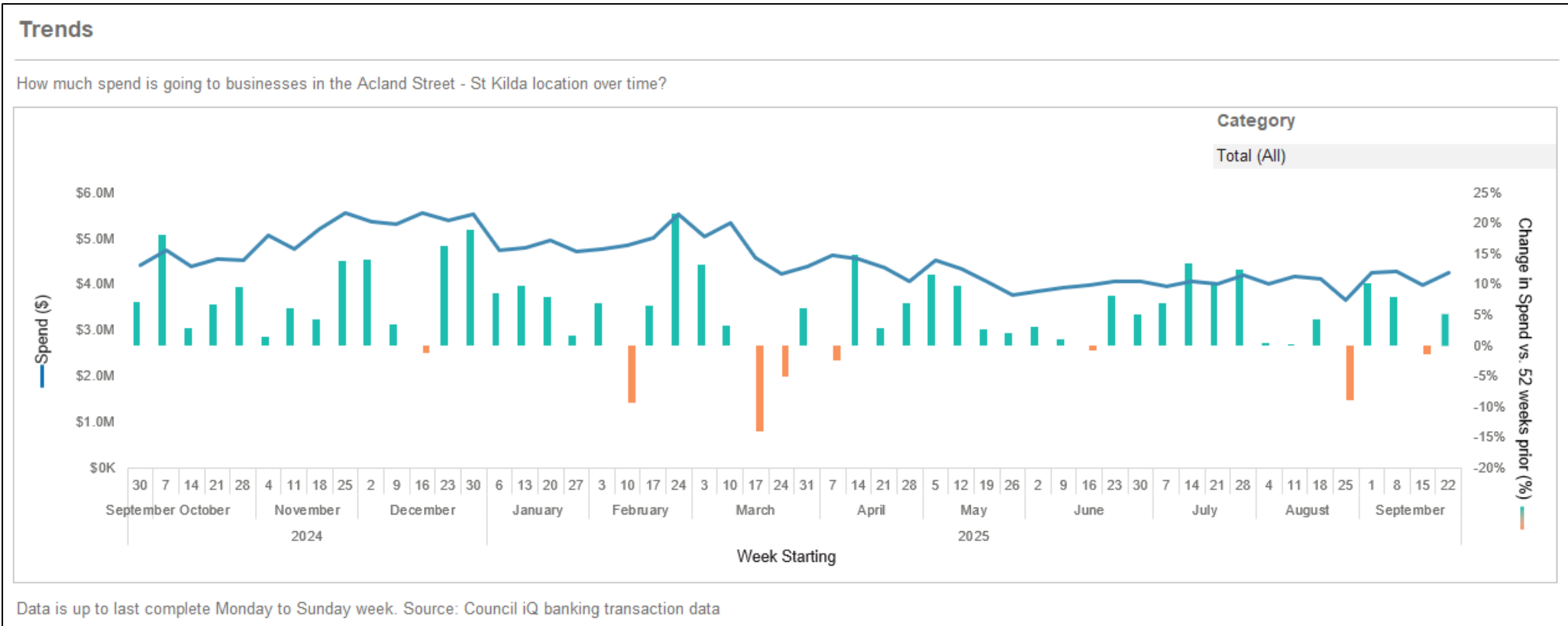
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Council permitted events

- Father’s Day Car and Bike Show, approximately **30,000** attendees across the day which had poor weather. For the first time the event was activated the evening prior, with a classic car display and live music in local venues. Businesses reported being busy, with warm weather aiding increased trade. Total attend expenditure impact: **\$2,574,000**
- Cars and Culture, their second event in St Kilda Triangle Car Park. Approximately **3,000** attendees with minimal food or beverage offering to encourage patrons to use existing traders. It was a pleasant sunny day, with local businesses and the St Kilda Esplanade Market reporting increased trade from the event. Total attend expenditure impact: **\$257,400**
- The Acland Street Village Business Association held their second annual Acland’s Pet Fest in O’Donnell Gardens. (numbers not provided)

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

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> Increase or decrease compared to previous quarter

Council permitted events

- Connor’s Run, approximately 4,500 participants, departing from Catani Gardens, heading north along the Bay Trail. The economic impact was likely across the wider municipality rather than specific to the Fitzroy Street precinct.
Total attend expenditure impact: \$350,685
- The Fitzroy Street Business Association continues to run its monthly (Sunday) Foodie Fare market along Fitzroy Street. The market has a consistent group of stallholders and engages with new businesses on Fitzroy Street to encourage participation.
(numbers not provided)
- Around the World in One Night, restaurant crawl along Fitzroy Street. Delivered by the Fitzroy Street Business Association on Wednesday 17 September.
(numbers not provided)

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.





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Bay Street, Port Melbourne

Bay Street, Port Melbourne

Business			Vacancy Rate	Customer Requests	Footpath Trading Permits
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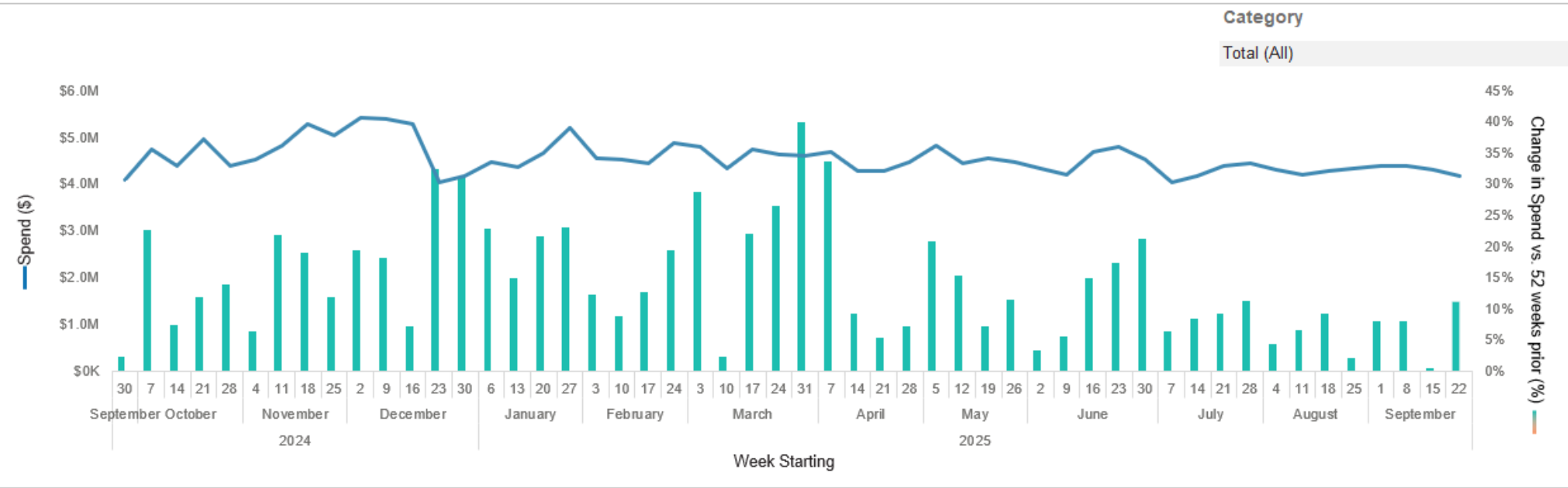
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** As at June 2025
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Council permitted events

- Permitted events were minor in scale, such as street stall activities.
(numbers not provided)

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 banking transaction data



MISS
MR. MAT
CAFE

MISS
MR. MAT
CAFE

MISS
MR. MAT
CAFE

Leonard St.

Carlisle Street, Balaclava

live
Love
LOCAL

Carlisle Street, Balaclava

Business			Vacancy Rate	Customer Requests	Footpath Trading Permits
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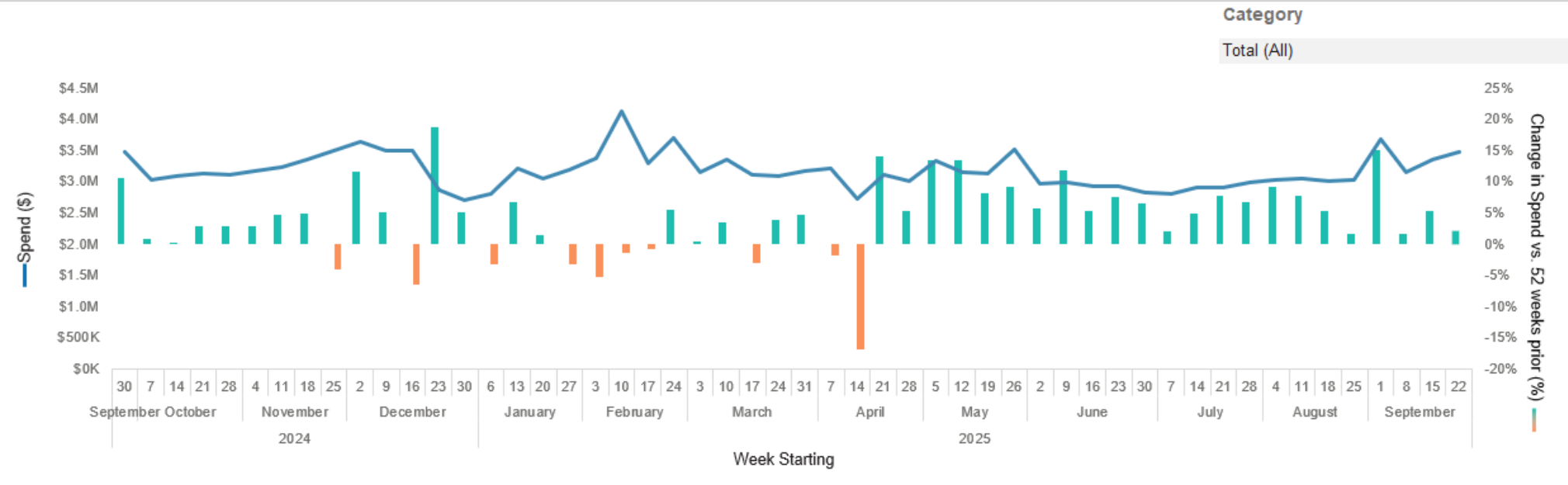
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Council permitted events

- The Carlilse Street Traders Association delivered a Health & Wellness promotion of local businesses, with musicians performing outside designated businesses on three separate days.
(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 banking transaction data



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: 71.13 Sep: 23.08 Aug: 24.64 Jul: 23.42 Previous: 66.50	Jul, Aug & Sep: Department stores, clothing & accessories	Southbank-East Southbank-West Docklands South Yarra-West Melbourne CBD-West	6.9** -3.1#	165 (+38') Street/laneway cleaning Dumped rubbish Illegally parked vehicle	63 no change'

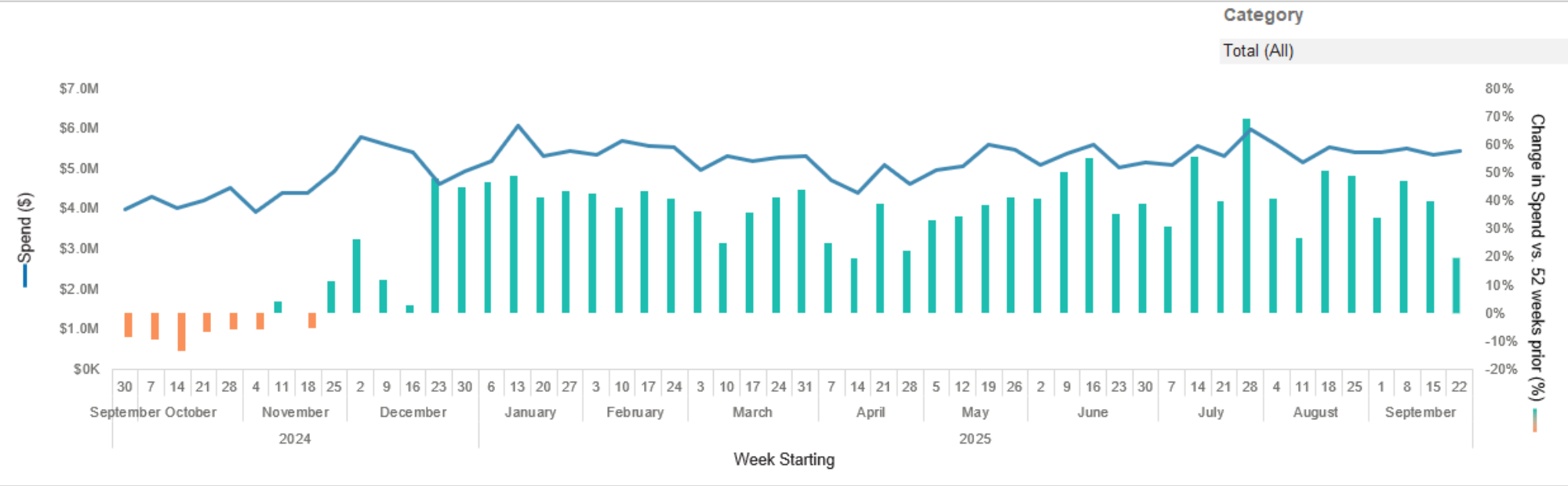
Notes:
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Increase or decrease compared to December 2024
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Council permitted events

- Permitted events were minor in scale, such as street stall activities.
(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 banking transaction data