



# Quarterly Precinct Health Report

Edition 7

October - December 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:

**\$1,240.54 million**

spent by CoPP residents between Oct – Dec 2025

Quarterly change: **+\$78.71M / +6.77%**

Year on year: **+\$63.38M / +5.38%**

Highest Spend Categories:

Other discretionary retail (**\$132.84M**)

Supermarkets (**\$122.88M**)

Department stores, clothing and accessories (**\$105.32M**)

Highest Spend Growth Categories (vs 2024)

Online entertainment (October and November)

Public services (December)



## Business Spend

Source: Council IQ

Resident and visitor spend within the City of Port Phillip

Total Spend:

**\$571.98 million**

Quarterly change: **+\$73.98M / +14.86%**

Year on year: **+37.45M / +7.01%**

Highest Spend Categories:

Supermarkets (**\$109.14M**)

Other discretionary retail (**\$72.31M**)

Restaurants (**\$64.47M**)

Highest Spend Growth Categories (vs 2024)

Breweries and wineries

(October, November and December)



## Event Permits

Source: CoPP Events department

Number of permits issued:

**144** (previous quarter: 58; Q2 2024/25: 127)

Category

- Community: 28
- General: 45
- Major: 7
- Market: 13
- Minor: 38
- Promotional: 6
- Street stall: 7

Ward

- Albert Park: 18
- Alma: 3
- Balaclava: 10
- Elwood: 12
- Lakeside: 0
- Montague: 13
- Port Melbourne: 12
- South Melbourne: 9
- St Kilda: 65
- Multiple: 2



## Customer Requests



## Footpath Trading Permits



## Number of Businesses

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

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

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

### Number of requests in precincts:

**1,291**

(previous quarter: 1,294)

### Highest reported issues:

Street & laneway cleaning: **129** (168)

Dumped rubbish: **106** (134)

Illegally parked vehicle: **102** (77)

### Highest reported precinct:

Fitzroy Street **442** (424)

### Total number of permits:

**650 (-4)**

Outdoor dining: 435 **(-3)** / 67% **(no change)**

### Number of new approved permits:

**27 (+1)**

Outdoor dining: 17 **(-2)** / 63% **(-10%)**

### Total number of parklets:

**46 (no change)**

The number of GST registered businesses increased by **61** in the June 2025 quarter – **534** new GST registrations and 473 cancellations.

For the March 2025 quarter the number of GST registered businesses increased by **106** – **508** new GST registrations and 402 cancellations.

*Note: Methodological changes to filters of datasets will sometimes occur, resulting in revisions to published business counts.*

## Commentary

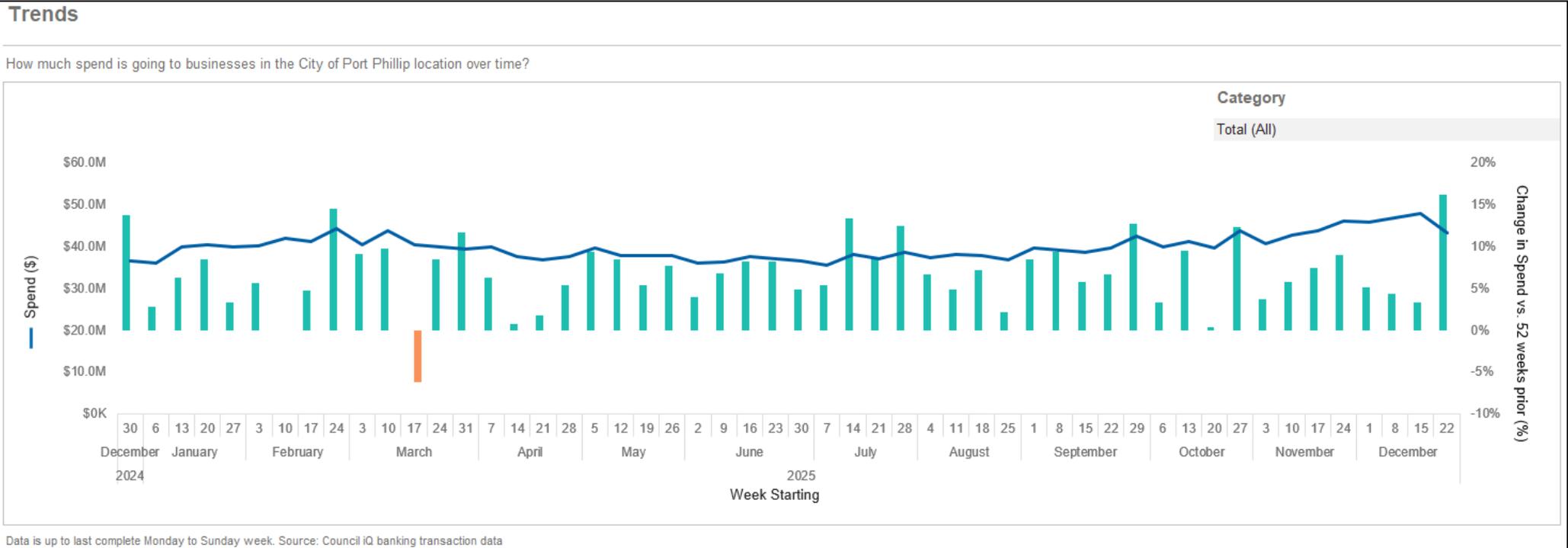
- The previously reported decline in café spend and the number of customers (attributed to the rise of hybrid work and high living costs) continued for the 12 months to December 2025, which saw café expenditure down **7.1%** year on year. This decline slowed in quarter 2, 2025 compared to the same quarter 2024 – December 2025: **-0.2%**, November: **-2.4%**, October: **-2.7%**.
- The night-time economy as a percentage of total day and night spend for Port Phillip in December 2025 was **26.7%** (up from 24.7% in September 2025). The highest ranked precinct in December was Fitzroy Street (**61.4%**), followed by St Kilda Foreshore (**49.4%**), Acland Street (**36.1%**), Clarendon Street (**24.7%**), Glen Eira Road (**23.8%**), Carlisle Street and Ormond Road, (**22.3%**) and Bay Street (**22.1%**).
- The on-road events season kicked off in the second quarter of the year with Melbourne Marathon, Around the Bay, Ironman 70.3, 2XU Triathlon Race 1 and Wellness Run. Melbourne Marathon and Wellness Run both saw a record number of participants and drew large crowds to the municipality. In addition, this quarter saw some small and larger scale cultural events such as Cars & Culture (St Kilda Triangle Car Park), Oktoberfest in the Gardens

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(Catani Gardens, St Kilda), Carols at Gasworks (Gasworks Arts Park, Albert Park) and Melbourne Shakespeare Company Plays in the Park series (St Kilda Botanical Gardens). These events generated an economic impact of **\$7,289,866**.

- The Consumer Price Index rose **3.8%** in the 12 months to December 2025, up from **3.4%** to November. The largest contributor to annual inflation in December was Housing, up **5.5%**. This was followed by Food and non-alcoholic beverages, up **3.4%**, and Recreation and culture, which rose **4.4%**. (ABS, 28 January 2026)
  - The December Victorian unemployment rate of **4.6%** (down from 4.7% in September), was the highest of any state or territory. The national rate was **4.1%**. (ABS, seasonally adjusted)
  - Job vacancies rose in three of the eight states and territories over the quarter to November 2025. Victoria had the biggest increase of **7%**, followed by Western Australia (up 6.5%) and ACT (up 3.7%). Nationally, job vacancies fell **0.2%**. (ABS, seasonally adjusted)
  - Household spending saw Victoria record a **0.1%** decline in September 2025, a **1.3%** rise in October, and a **1%** rise in November. Australian household spending saw rises of **0.4%** in September, **1.4%** in October and **1%** in November. (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 December 2025 versus the past year and Metro VIC for the City of Port Phillip location?

Category	Data representing Spend								
	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	
<b>Total</b>	<b>\$202.0M</b>	↑ 5.8%	↑ 2.5%	<b>\$123.3M</b>	↑ 7.5%	↑ 3.5%	<b>\$78.7M</b>	↑ 3.4%	↑ 1.5%
<b>Food Retailing</b>	<b>\$62.2M</b>	→ 0.0%	↑ 1.4%	<b>\$26.0M</b>	↓ -2.1%	↑ 3.2%	<b>\$36.2M</b>	↑ 1.6%	↑ 0.5%
Supermarkets	\$37.1M	↑ 0.5%	↑ 1.2%	\$12.9M	↑ 0.1%	↑ 3.5%	\$24.2M	↑ 0.7%	↑ 0.2%
Groceries and Other Food Retailing	\$25.1M	↓ -0.7%	↑ 1.9%	\$13.1M	↓ -4.1%	↑ 2.8%	\$12.0M	↑ 3.3%	↑ 1.2%
<b>Tourism and Entertainment</b>	<b>\$54.8M</b>	↑ 5.1%	↑ 6.2%	<b>\$39.2M</b>	↑ 5.5%	↑ 6.9%	<b>\$15.5M</b>	↑ 4.2%	↑ 5.0%
Restaurants	\$23.3M	↑ 5.3%	↑ 7.7%	\$16.3M	↑ 5.0%	↑ 7.7%	\$7.0M	↑ 5.8%	↑ 7.7%
Pubs, Taverns and Bars	\$14.0M	↓ -3.0%	↑ 5.0%	\$10.2M	↓ -2.4%	↑ 6.3%	\$3.8M	↓ -4.8%	↑ 2.4%
Takeaway and Fast Food Outlets	\$7.2M	↑ 12.5%	↑ 6.2%	\$5.0M	↑ 10.9%	↑ 7.1%	\$2.3M	↑ 16.0%	↑ 5.1%
Cafes	\$5.5M	↓ -0.2%	↑ 1.0%	\$3.5M	↑ 0.3%	↑ 2.9%	\$2.1M	↓ -1.0%	↓ -2.0%
Attractions, Events and Recreation	\$4.6M	↑ 31.8%	↑ 10.5%	\$4.2M	↑ 30.4%	↑ 10.7%	\$360K	↑ 50.4%	↑ 9.5%
Breweries and Wineries	\$143K	↑ 40.8%	↓ -18.8%	\$115K	↑ 27.5%	↓ -24.0%	\$28K	↑ 148.9%	↓ -4.3%
<b>Discretionary Retail</b>	<b>\$33.9M</b>	↑ 4.4%	↑ 1.2%	<b>\$21.4M</b>	↑ 5.6%	↑ 1.6%	<b>\$12.5M</b>	↑ 2.3%	↑ 0.7%
Other Discretionary Retail	\$26.4M	↑ 4.3%	↑ 1.7%	\$16.0M	↑ 5.0%	↑ 1.9%	\$10.4M	↑ 3.3%	↑ 1.5%
Department Stores, Clothing & Accessories	\$7.5M	↑ 4.6%	↑ 0.9%	\$5.4M	↑ 7.6%	↑ 1.6%	\$2.1M	↓ -2.5%	↓ -0.3%
<b>Private Transport</b>	<b>\$9.6M</b>	↑ 7.9%	→ 0.0%	<b>\$6.4M</b>	↑ 9.3%	↓ -1.2%	<b>\$3.2M</b>	↑ 5.4%	↑ 1.1%
<b>Accommodation - Online</b>	<b>\$2.0M</b>	↑ 15.2%	↓ -1.6%	<b>\$1.9M</b>	↑ 16.5%	↓ -1.6%	<b>\$129K</b>	↓ -0.9%	
<b>Accommodation - Instore</b>	<b>\$1.9M</b>	↓ -9.0%	↑ 2.2%	<b>\$1.6M</b>	↓ -6.1%	↑ 0.6%	<b>\$363K</b>	↓ -19.6%	↑ 11.7%

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
	<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	<b>Total: 67.90</b> Dec: 24.81 Nov: 22.71 Oct: 20.39 Previous: 54.46	<b>Oct:</b> Attractions, events & recreation <b>Nov:</b> Accommodation <b>Dec:</b> Restaurants	Prahran-Windsor Caulfield North Brighton Elsternwick Caulfield South	6.7** -3.9#	<b>278 (+60')</b> Graffiti removal Street/laneway cleaning Dumped rubbish	52 -1'
Fitzroy Street, St Kilda	<b>Total: 22.70</b> Dec: 8.10 Nov: 7.68 Oct: 6.92 Previous: 18.51	<b>Oct, Nov &amp; Dec:</b> Cafes	Prahran-Windsor South Yarra-North Caulfield North Brighton Southbank-East	10.1** +0.9#	<b>442 (+18')</b> Street/laneway cleaning Illegally parked vehicle Dumped rubbish	44 no change
Bay Street, Port Melbourne	<b>Total: 62.97</b> Dec: 21.64 Nov: 20.53 Oct: 20.80 Previous: 56.28	<b>Oct &amp; Nov:</b> Accommodation <b>Dec:</b> Attractions, events & recreation	Docklands Southbank-East Brighton Southbank-West Newport	8.6** +3#	<b>239 (-26')</b> Illegally parked vehicle Dumped rubbish Street/laneway cleaning	68 no change

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	<b>Total: 43.73</b> Dec: 14.92 Nov: 14.57 Oct: 14.24 Previous: 41.29	<b>Oct &amp; Nov:</b> Attractions, events & recreation <b>Dec:</b> Department stores, clothing & accessories	Caulfield North Prahran-Windsor Caulfield South Elsternwick Brighton	8.2** -1.9#	197 (-25') Street/laneWAY cleaning Dumped rubbish Graffiti removal	56 +1'
Clarendon Street, South Melbourne	<b>Total: 75.63</b> Dec: 25.85 Nov: 25.86 Oct: 23.92 Previous: 70.44	<b>Oct:</b> Pubs, taverns & bars <b>Nov &amp; Dec:</b> Department stores, clothing & accessories	Southbank-East Southbank-West Docklands South Yarra-West Prahran-Windsor	7.4** +0.5#	135 (-30') Dumped rubbish Excessive noise Street litter bins	65 +2'

**Notes:**

\*Compared to previous year

\*\* As at late December 2025/early January 2026

# Increase or decrease compared to August 2025

> Increase or decrease compared to previous quarter

# HELLO HARRY

*The Burger Joint*

buddha culture

TOBACCONIST



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



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
<b>Total: 67.90</b> Dec: 24.81 Nov: 22.71 Oct: 20.39 Previous: 54.46	<b>Oct:</b> Attractions, events & recreation <b>Nov:</b> Accommodation <b>Dec:</b> Restaurants	Prahran-Windsor Caulfield North Brighton Elsternwick Caulfield South	6.7** -3.9#	278 (+60) Graffiti removal Street/laneway cleaning Dumped rubbish	52 -1 <sup>&gt;</sup>

**Notes:**

\*Compared to previous year

\*\* As at late December 2025/early January 2026

# Increase or decrease compared to August 2025

> Increase or decrease compared to previous quarter

## Council permitted events

- Cars and Culture held their third event in St Kilda Triangle Car Park. Approximately **3,000** attendees with minimal food or beverage offering to encourage patrons to use existing traders.  
Total attend expenditure impact: **\$257,400**
- The Acland Street Village Business Association activated Halloween and Christmas events including Creepy Kooky Collectibles Market, Acland Christmas activations and a Christmas tree. They also held a successful new music event, Blessington Street Festa, to celebrate all new traders there. (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.

Trends

How much spend is going to businesses in the Acland Street - St Kilda location over time?



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



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: 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
<b>Total: 22.70</b> Dec: <b>8.10</b> Nov: <b>7.68</b> Oct: <b>6.92</b> Previous: <b>18.51</b>	<b>Oct, Nov &amp; Dec:</b> Cafes	Prahran–Windsor South Yarra–North Caulfield North Brighton Southbank–East	<b>10.1**</b> <b>+0.9#</b>	<b>442 (+18')</b> Street/laneway cleaning Illegally parked vehicle Dumped rubbish	<b>44</b> <b>no change'</b>

**Notes:**

\*Compared to previous year

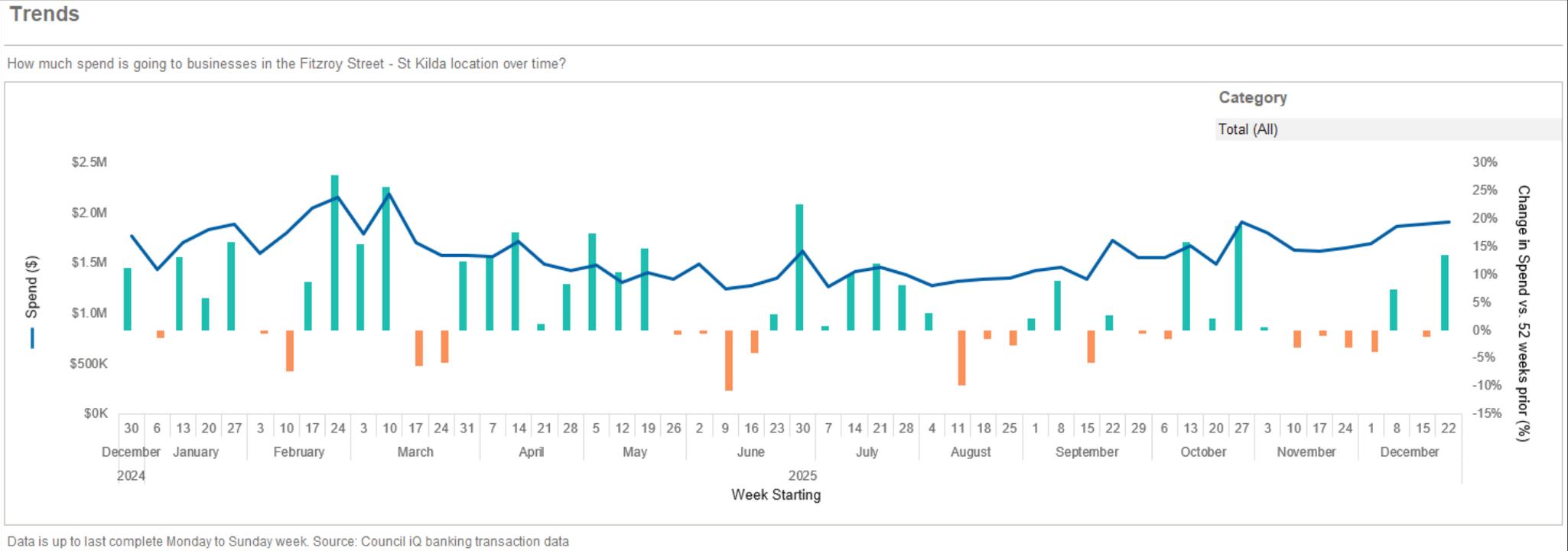
\*\* As at late December 2025/early January 2026

# Increase or decrease compared to August 2025

> Increase or decrease compared to previous quarter

## Council permitted events

- Melbourne Marathon (12 October) and Wellness Run (30 November) brought participants and spectators to the Fitzroy Street area. Wellness Run had a new route for the half marathon starting in Albert Park and continuing down Fitzroy Street. This meant that post event, participants returned along Fitzroy Street to where they were parked around Albert Park Lake. (numbers not provided)
- 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)
- Nightmare on Fitzroy (Halloween), delivered by the Fitzroy Street Business Association on Friday 31 October. (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: CoPP City Permits team</i>
Total Spend (\$million)	Highest Growth Category*	Top 5 source markets (visitor \$)	%	Number of requests & key categories	Total number of Footpath Trading Permits
<b>Total: 62.97</b> Dec: 21.64 Nov: 20.53 Oct: 20.80 Previous: 56.28	<b>Oct &amp; Nov:</b> Accommodation <b>Dec:</b> Attractions, events & recreation	Docklands Southbank-East Brighton Southbank-West Newport	8.6** +3#	239 (-26') Illegally parked vehicle Dumped rubbish Street/laneway cleaning	68 no change'

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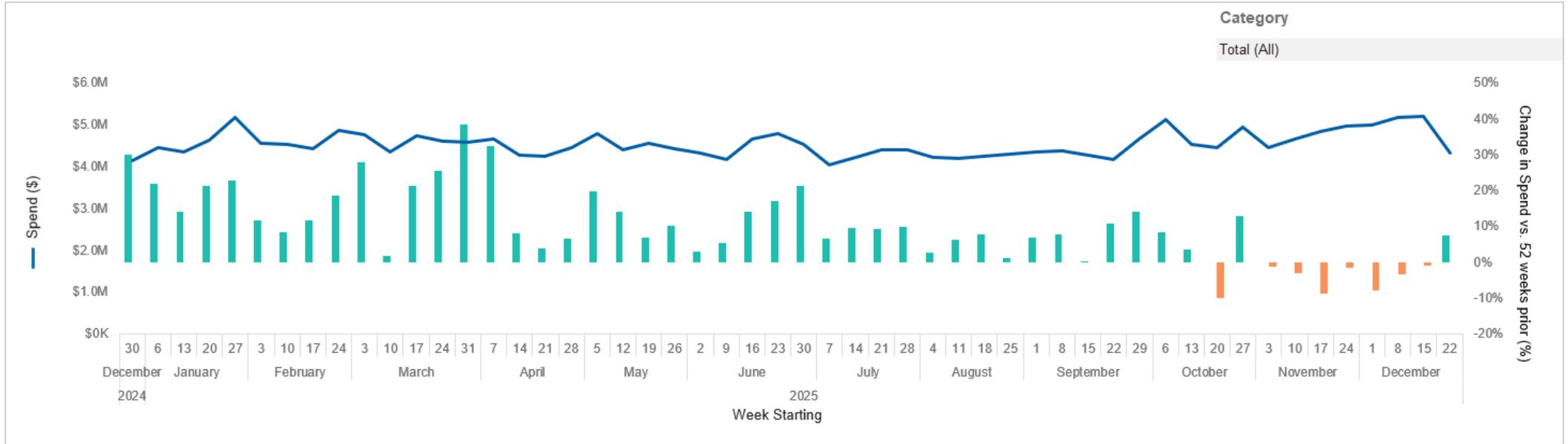
> Increase or decrease compared to previous quarter

## Council permitted events

- Permitted events included HOWL-o-Ween (25 October) and Christmas Adventure Day (13 December), both delivered by the Port Melbourne Business Association. These events were lower in impact compared to previous years with no road closures. (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

Leonard St.

zap 24 Hour Workout day and night zapfitness.com.au

live Love LOCAL

Carlisle Street, Balaclava

## Carlisle Street, Balaclava

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>
<b>Total Spend (\$million)</b>	<b>Highest Growth Category*</b>	<b>Top 5 source markets (visitor \$)</b>	<b>%</b>	<b>Number of requests &amp; key categories</b>
<b>Total: 43.73</b> Dec: <b>14.92</b> Nov: <b>14.57</b> Oct: <b>14.24</b> Previous: <b>41.29</b>	<b>Oct &amp; Nov:</b> Attractions, events & recreation <b>Dec:</b> Department stores, clothing & accessories	Caulfield North Prahran-Windsor Caulfield South Elsternwick Brighton	<b>8.2**</b> <b>-1.9#</b>	<b>197 (-25&gt;)</b> Street/laneway cleaning Dumped rubbish Graffiti removal
				<b>56</b> <b>+1&gt;</b>

**Notes:**

\*Compared to previous year

\*\* As at late December 2025/early January 2026

# Increase or decrease compared to August 2025

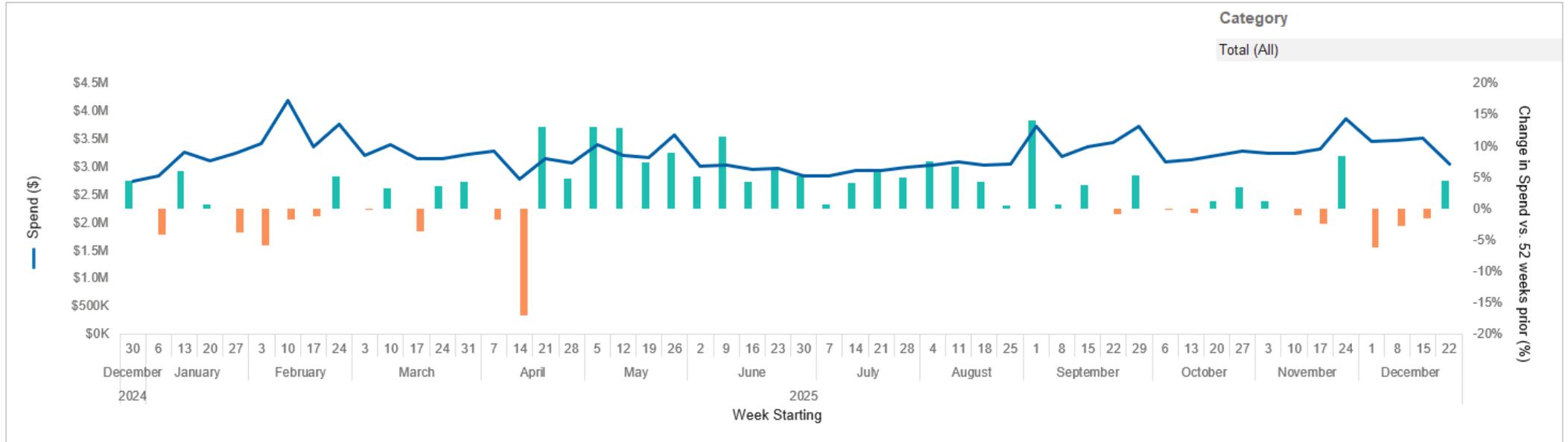
> Increase or decrease compared to previous quarter

## Council permitted events

- The Carlisle Street Traders Association delivered a Health & Wellness promotion of local businesses, with musicians performing outside designated businesses on 4 October. (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
<i>Source: Council IQ</i>		<i>Source: Council IQ</i>		<i>Source: CoPP vacancy audits</i>	<i>Source: OneCouncil (including Snap, Send Solve)</i>
Total Spend (\$million)	Highest Growth Category*	Top 5 source markets (visitor \$)	%	Number of requests & key categories	Total number of Footpath Trading Permits
<b>Total: 75.63</b> Dec: 25.85 Nov: 25.86 Oct: 23.92 Previous: 70.44	Oct: Pubs, taverns & bars Nov & Dec: Department stores, clothing & accessories	Southbank-East Southbank-West Docklands South Yarra-West Prahran-Windsor	7.4** +0.5#	135 (-30>) Dumped rubbish Excessive noise Street litter bins	65 +2>

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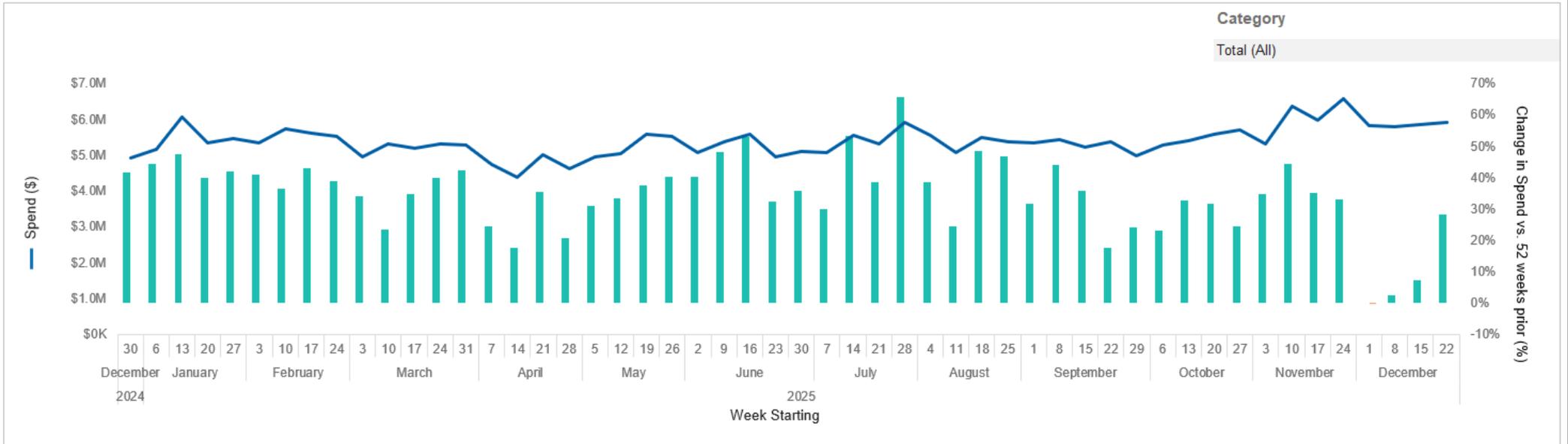
> Increase or decrease compared to previous quarter

## 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