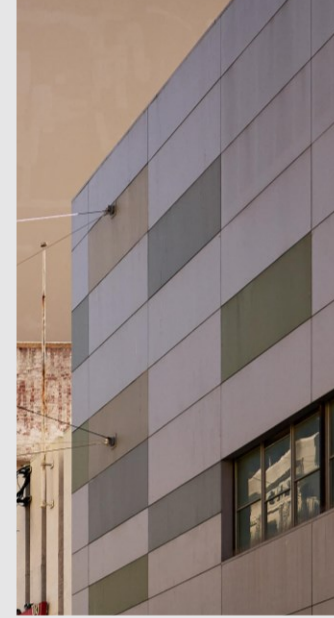
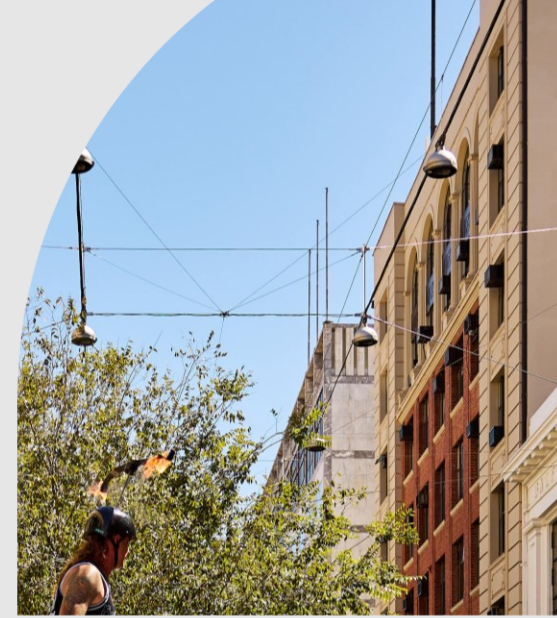


AEDA Insights

Activity Report

Q1 2026 (January - March)



Adelaide
Economic
Development
Agency



CITY OF
ADELAIDE

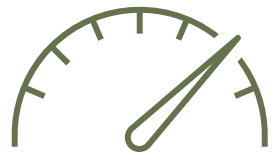
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Activity

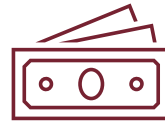
Q1 2026

Summary of Findings



Overall

- Activity levels in the City of Adelaide remained in line with last year, supported by a strong calendar of cultural, sporting and music events.
- Spending grew in real terms year-on-year, with a notable revival in discretionary categories.
- Visitation remained event driven, whilst mobility metrics continued to increase compared to last year.



Expenditure

- Discretionary spending on dining, apparel, and luxury goods reversed its softening trend observed in the previous quarter.
- Night-time spending reversed its declining trend, increasing year-on-year for the first time in several quarters.



Visitor Behaviour

- Visitor spending was concentrated around weekends and evenings relative to pre-COVID levels.
- International spending reached record quarterly levels, peaking during the Adelaide Fringe period.



Foot Traffic

- City wide visitation remained below last year, however destination-driven precincts outperformed commuter corridors.
- Major events such as Adelaide Fringe, WOMAdelaide, and Ed Sheeran's concert underpinned short-term visitation peaks.




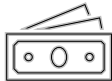
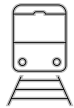

Mobility

- Public transport usage surpassed pre-COVID levels for the first time, increasing on both last year and the previous quarter.
- Parking transactions activity continued to improve on last year, whilst E-transport usage remained subdued.

Activity Metrics – Q1 2026



(Like-for-like change from Q1 2025)

		Q1 2026	January	February	March
Total visits (All combined sensors)		-12%	-13%	-14%	-10%
Total expenditure (Nominal, all categories)		+3%	-1%	+3%	+6%
Public transport (All modes)		+3%	-2%	+5%	+5%
Parking (On + off street validations)		+3%	-1%	+5%	+3%

Like-for-like analysis compares the same days over the period with the same days of the corresponding period last year



Quarterly activity levels – City of Adelaide

Activity levels hold year-on-year

Activity Score Q1

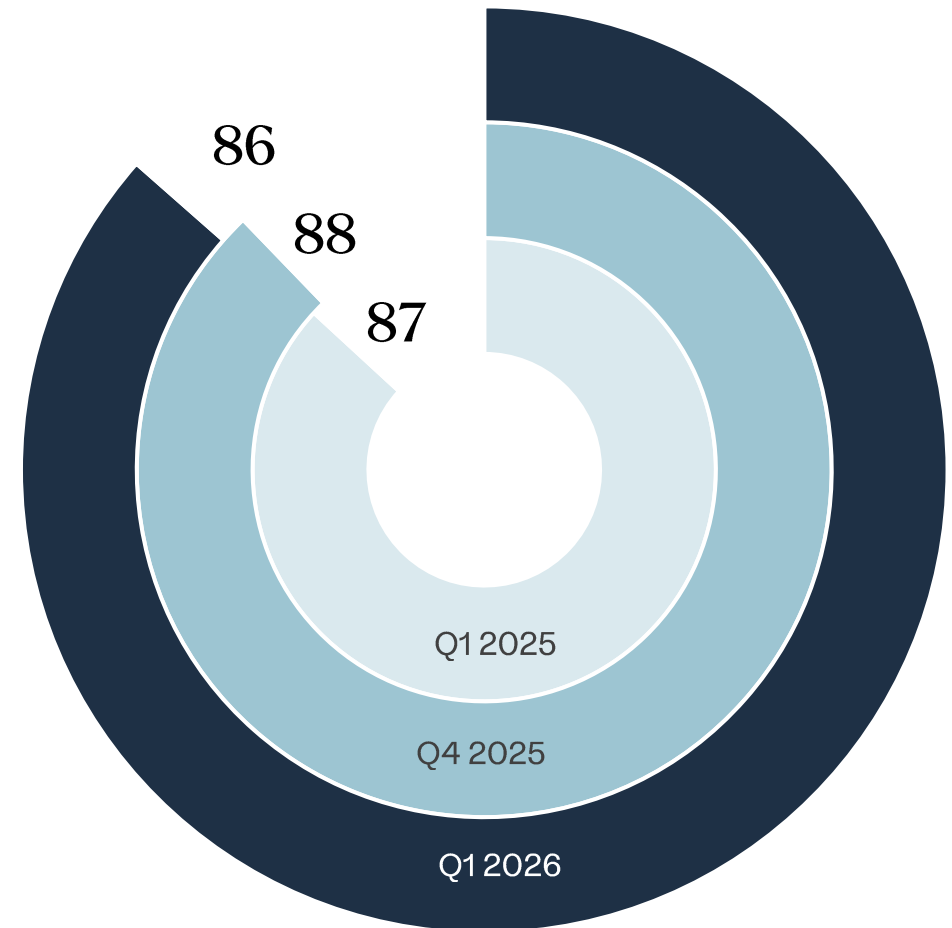
86

-1 pt on Q1 2025

-2 pts on Q4 2025

- After statistically modelling key activity indicators, including unique visitors, inflation adjusted expenditure, public transport validations and parking transactions, overall activity levels marginally decreased on last year and the previous quarter (refer to appendix for methodology).
- Q1 2026 activity was likely supported by a combination of major cultural and sporting events, including the Adelaide International, Tour Down Under, LIV Golf, Adelaide Fringe, WOMADelaide and Ed Sheeran’s Loop Tour. Together, these factors helped sustain activity levels in line with the same period last year.
- The busiest days of the quarter based on the AEDA activity model included Friday 20 March (Adelaide Fringe final weekend, Colors of Asia Festival, AFL Premiership game), 6 March (WOMADelaide opening night along with Adelaide Festival and Adelaide Fringe), and Thursday 5 March (Ed Sheeran’s Loop Tour along with March festivities)

Modelled Activity Scores

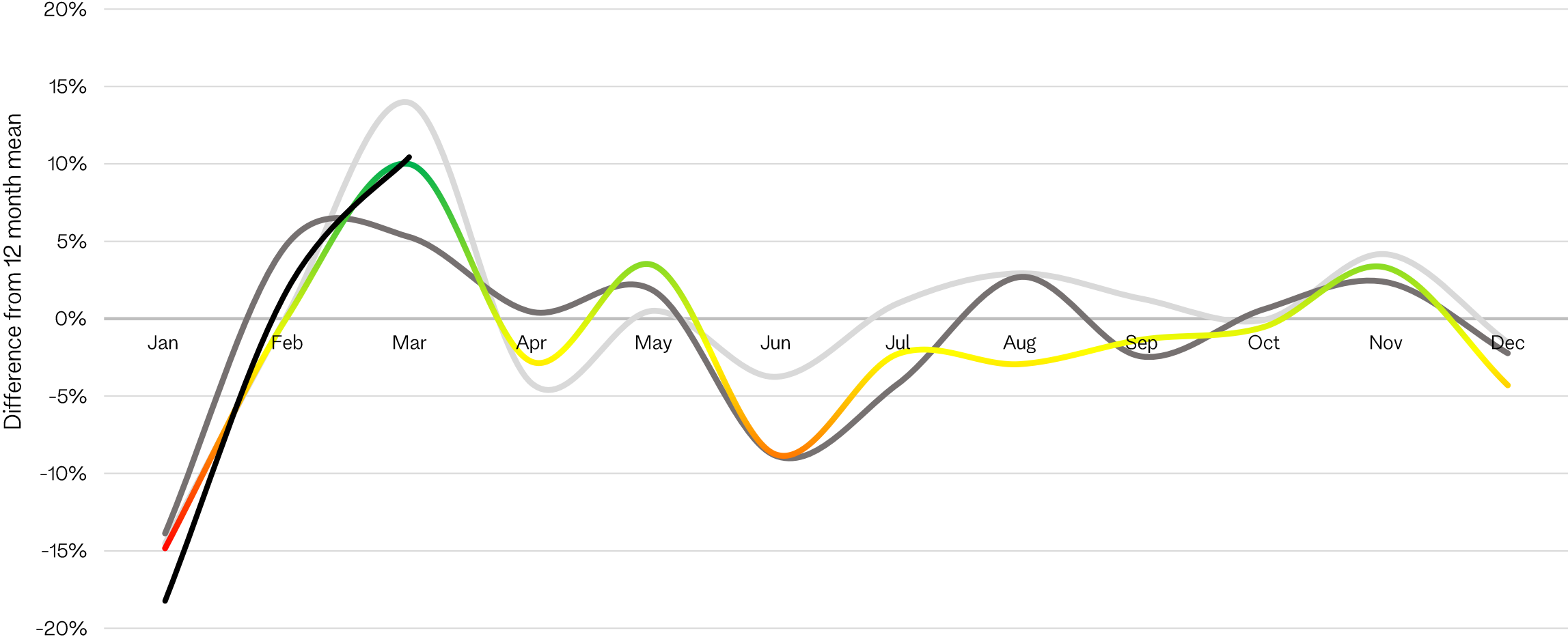


Monthly activity levels – City of Adelaide



Monthly score vs 12 month mean of modelled activity

— 2023 — 2024 — 2025 — 2026

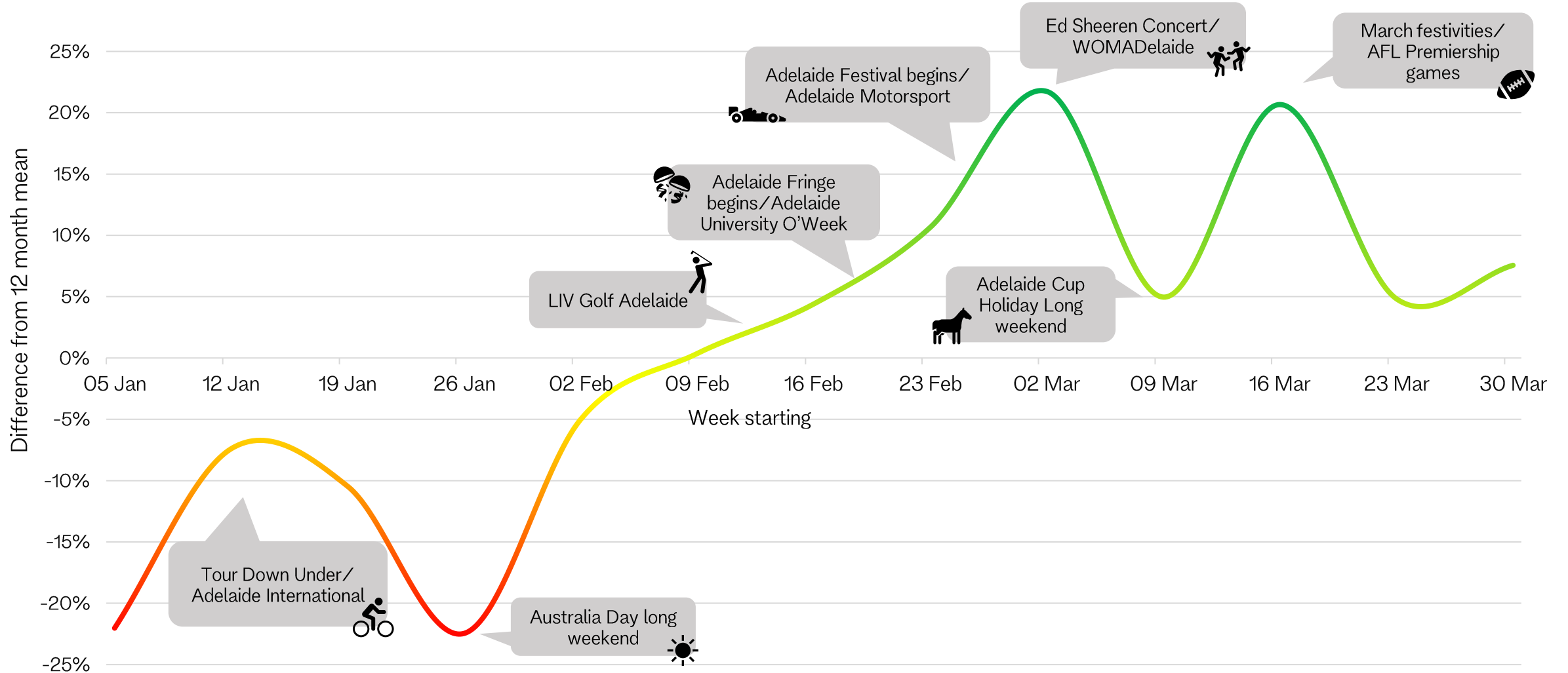


Source: AEDA Modelled Activity

Weekly activity levels – City of Adelaide



Weekly score vs 12 month mean of modelled activity



Expenditure – City of Adelaide

All major spending categories experienced growth

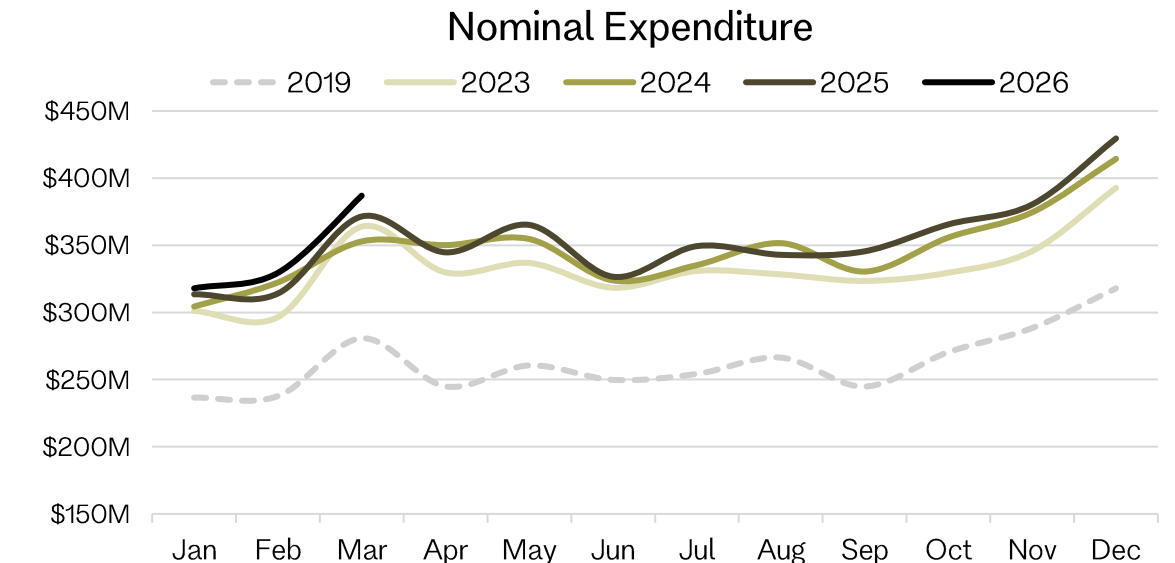
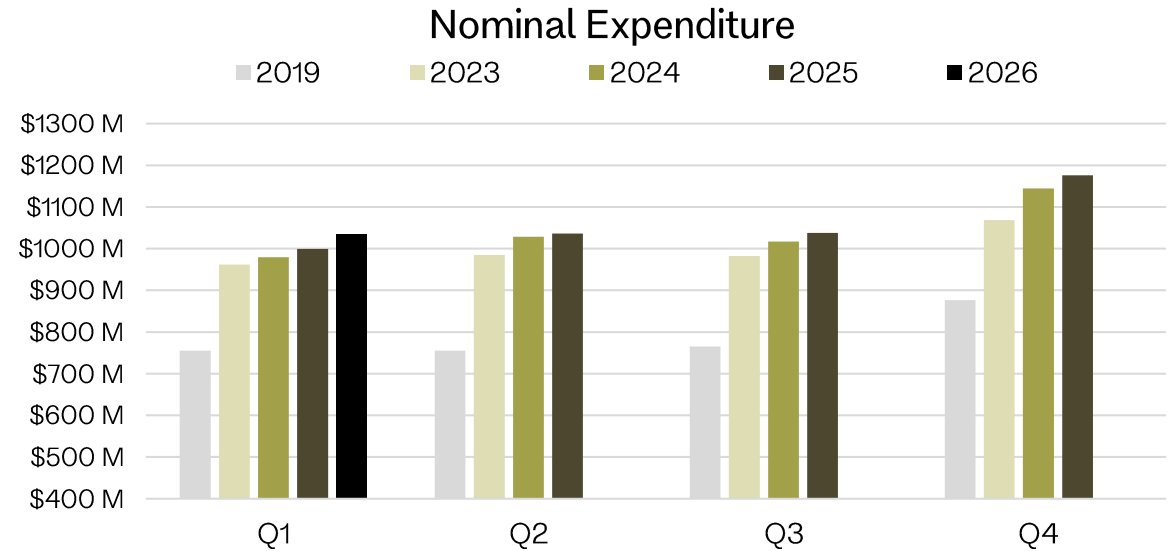
Total Nominal Expenditure Q1

\$1.03B

+4% on Q1 2025
-12% on Q4 2025

- Overall spending during the quarter was stronger compared to previous years and grew in real terms. Spending patterns indicated a revival in discretionary spending, as major categories such as dining and retail recorded year-on-year growth, likely driven by event-heavy calendar during February and March.
- January expenditure remained steady, with consumers continuing to spend in a more selective and deliberate manner post the end-of-December discretionary splurge, likely compounded by workers and students being away at the start of the year.
- Compared to last year, expenditure strengthened during February, supported by major events such as LIV Golf and the opening of Adelaide Fringe, along with the return of workers and students.
- March recorded the highest monthly expenditure during the quarter, reflecting the combined impact of major cultural and sporting events, music concerts and festivals, with real growth in discretionary and retail spending. Dining spending increased by 15% year-on-year, and spending during the Adelaide Fringe saw real growth compared to the event last year, as it was 5% higher in nominal terms.
- Work-hour expenditure continued its upward trajectory, both annually and from the previous quarter, reflecting continued momentum in daytime commercial activity. Resident expenditure both within the city and to external suburbs also increased compared to Q1 2025.





Source: Spendmapp by Geografia





Expenditure summary – City of Adelaide (CoA)

(Like-for-like change from Q1 2025)

	Q1 2026	January	February	March
Night-Time (6pm – 6am) 	+2%	-4%	+2%	+9%
Work Hour (8am – 6pm, Mon-Fri) 	+4%	+1%	+4%	+6%
CoA Resident (inside CoA boundary) 	+5%	+5%	+6%	+4%
CoA Resident (leakage to other suburbs) 	+7%	+7%	+8%	+6%

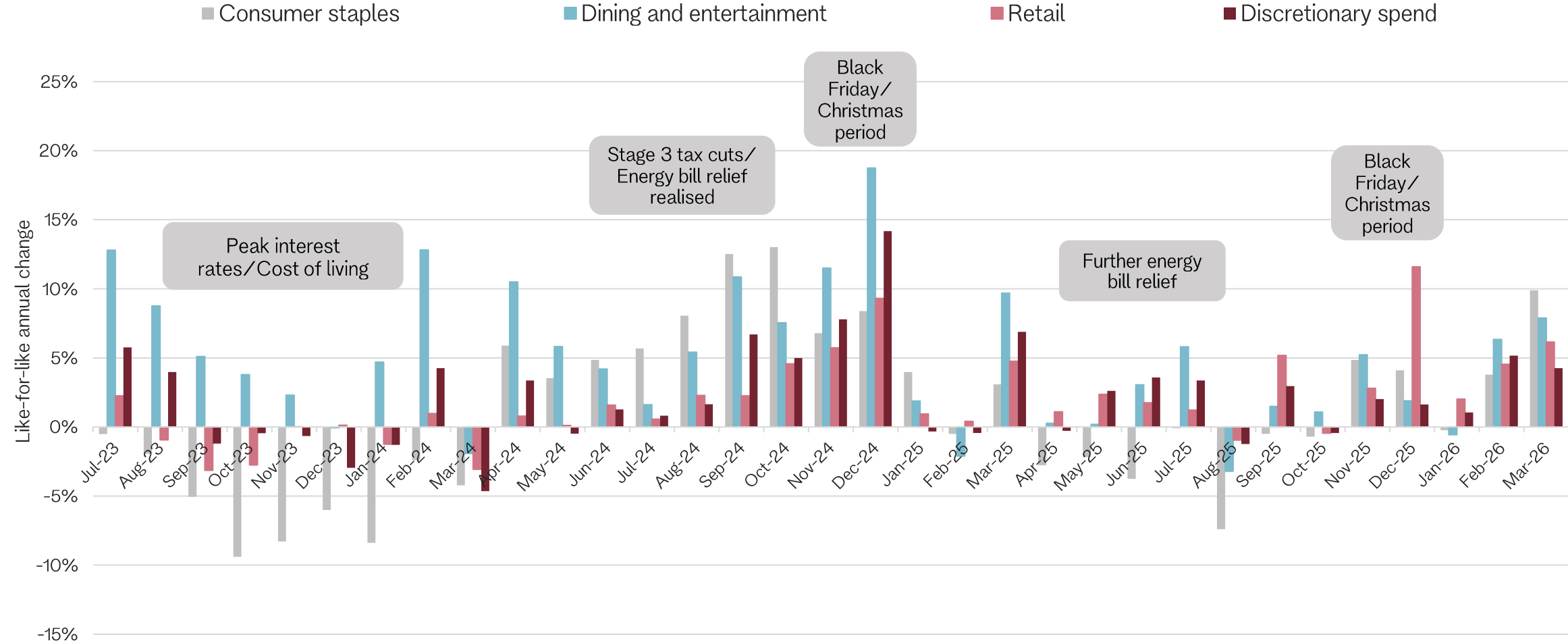
Source: Spendmapp by Geografia, like-for-like analysis compares the same days over the period with the same days of the corresponding period last year

Expenditure by major categories – City of Adelaide

(Like-for-like annual change)



Monthly year-on-year comparison



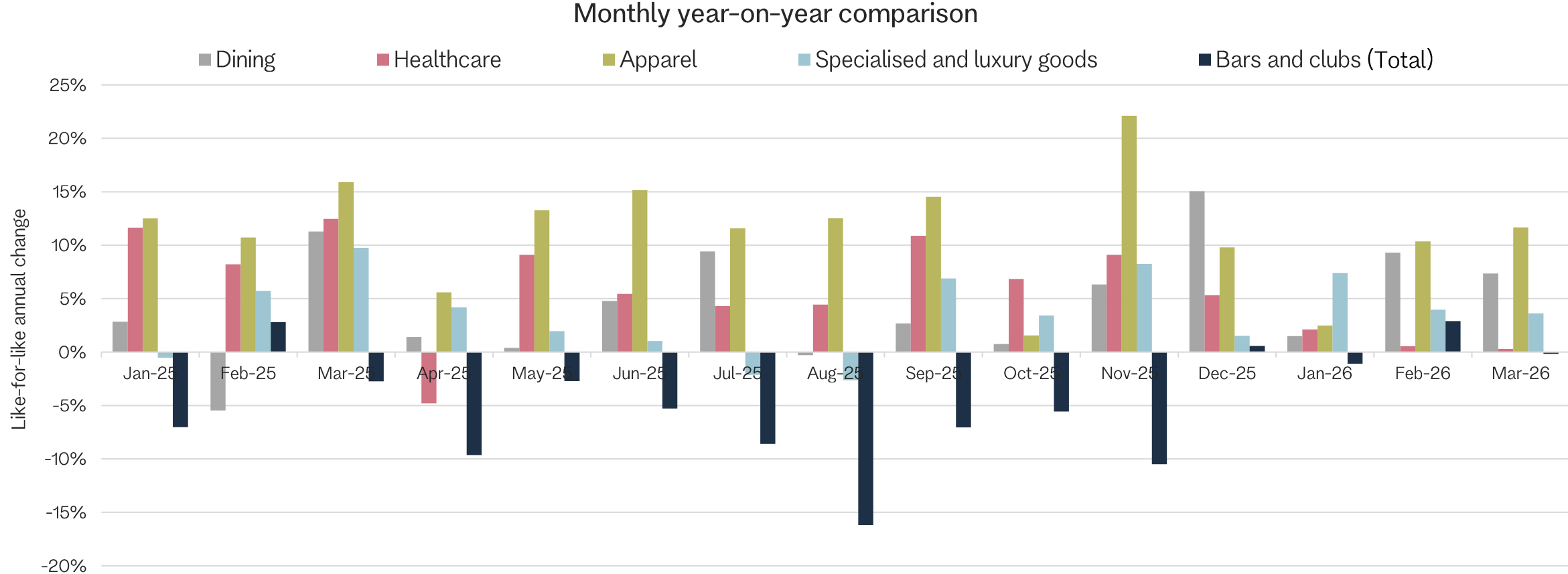
Source: Spendmapp by Geografia, like-for-like analysis compares the same days over the period with the same days of the corresponding period last year



Expenditure by major subcategories – City of Adelaide

(Like-for-like annual change)

Discretionary spending on dining, apparel and luxury goods was the most improved compared to Q1 2025.



Source: Spendmapp by Geografia, like-for-like analysis compares the same days over the period with the same days of the corresponding period last year

Night-time expenditure – City of Adelaide



Night-time spending reversed its decline trend

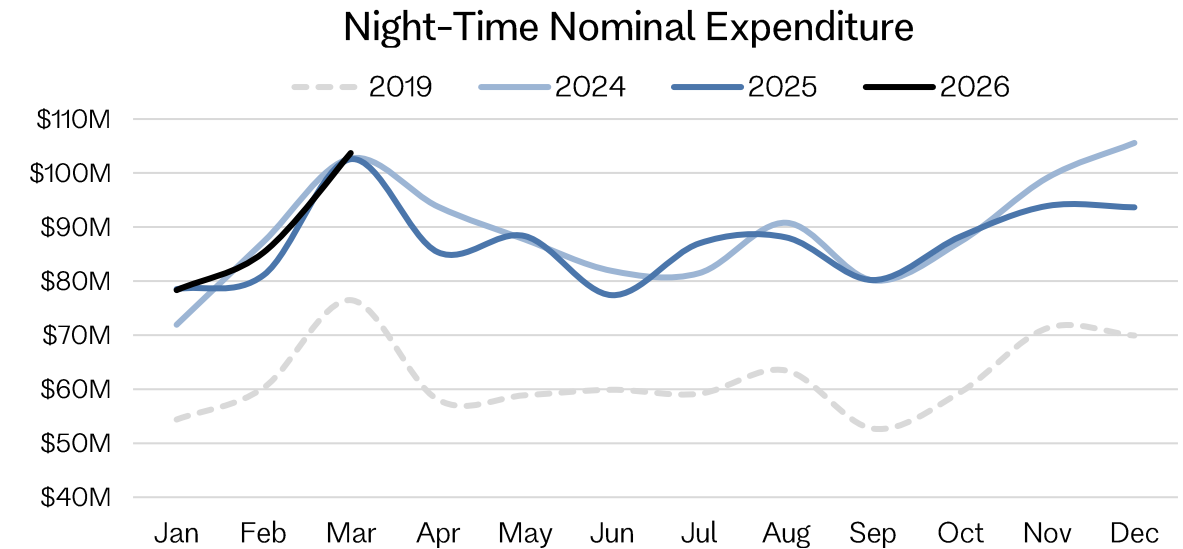
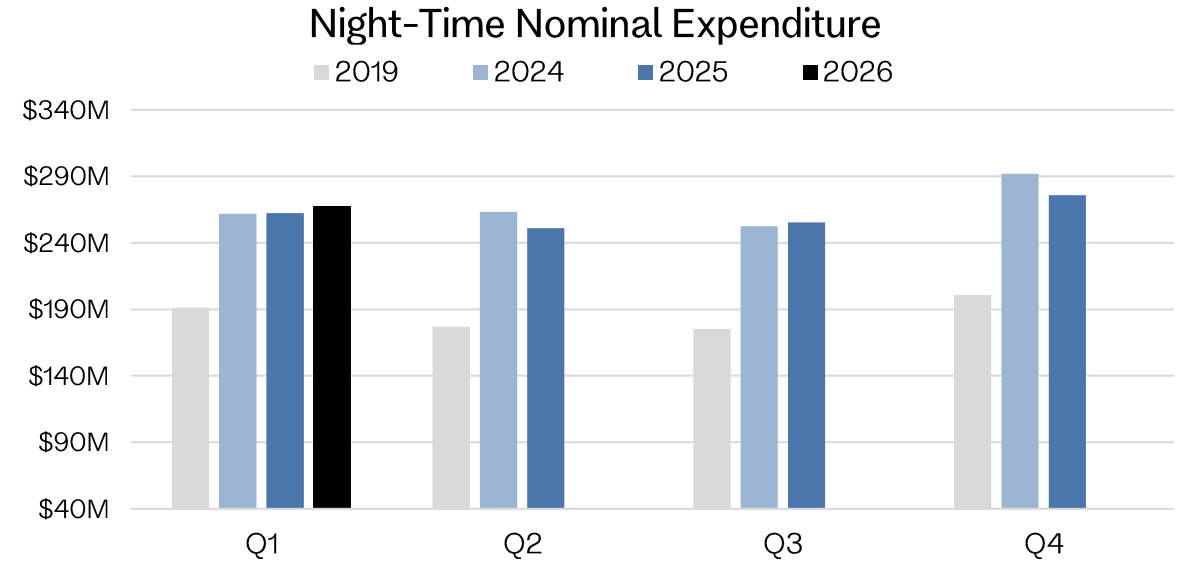
Total Nominal Expenditure Q1

\$267M

2% on Q1 2025
-3% on Q4 2025

- Night-time expenditure reversed its general decline and indicated a meaningful shift after multiple quarters.
- All night-time categories grew during the quarter with the exception of Bars and Clubs, which continued to contract annually. Entertainment spending led the recovery, 12% higher on Q1 2025, whilst dining during night-time hours increased by 6%.
- Ed Sheeran's concert on Thursday 5 March delivered a record high weeknight spend, with \$5.1 million transacted during night-time hours, an uplift of 101% on the year-to-date Thursday average.
- March was the strongest month for night-time expenditure during the quarter, increasing 9% annually. Weekday (Mon-Thu) night-time expenditure was 9% higher compared to last year, and 2% higher during the weekends (Fri-Sun).
- The event heavy calendar during February/March was a significant contributor to the recovery. During the Adelaide Fringe period, \$118 million was spent at night, 6% higher than the same event window last year, with spending during Adelaide Fringe weekends (Fri-Sun) being 3% higher year-on-year.

Source: SpineMap by Geografia

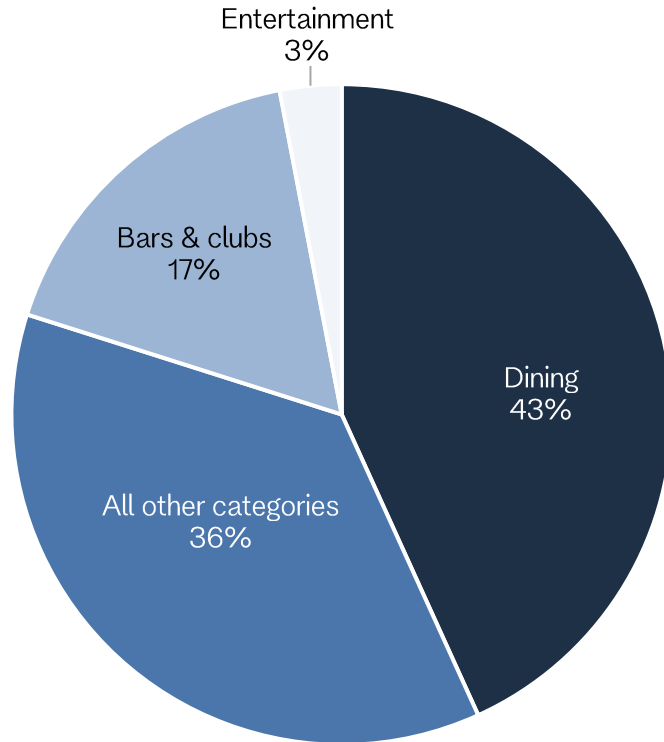




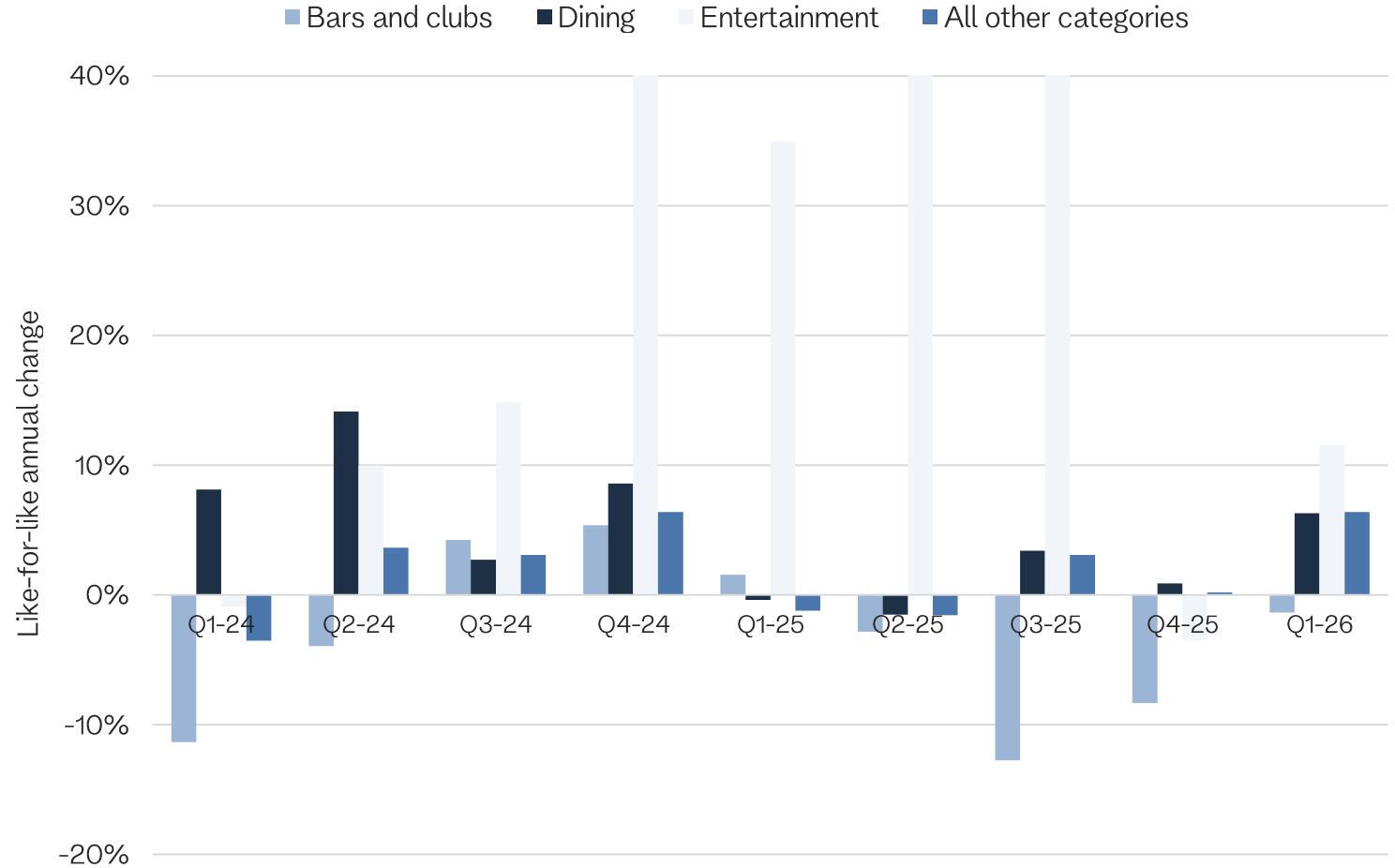
Night-time expenditure – City of Adelaide

(Like-for-like annual change)

Proportion of night-time categories



Quarterly year-on-year comparison



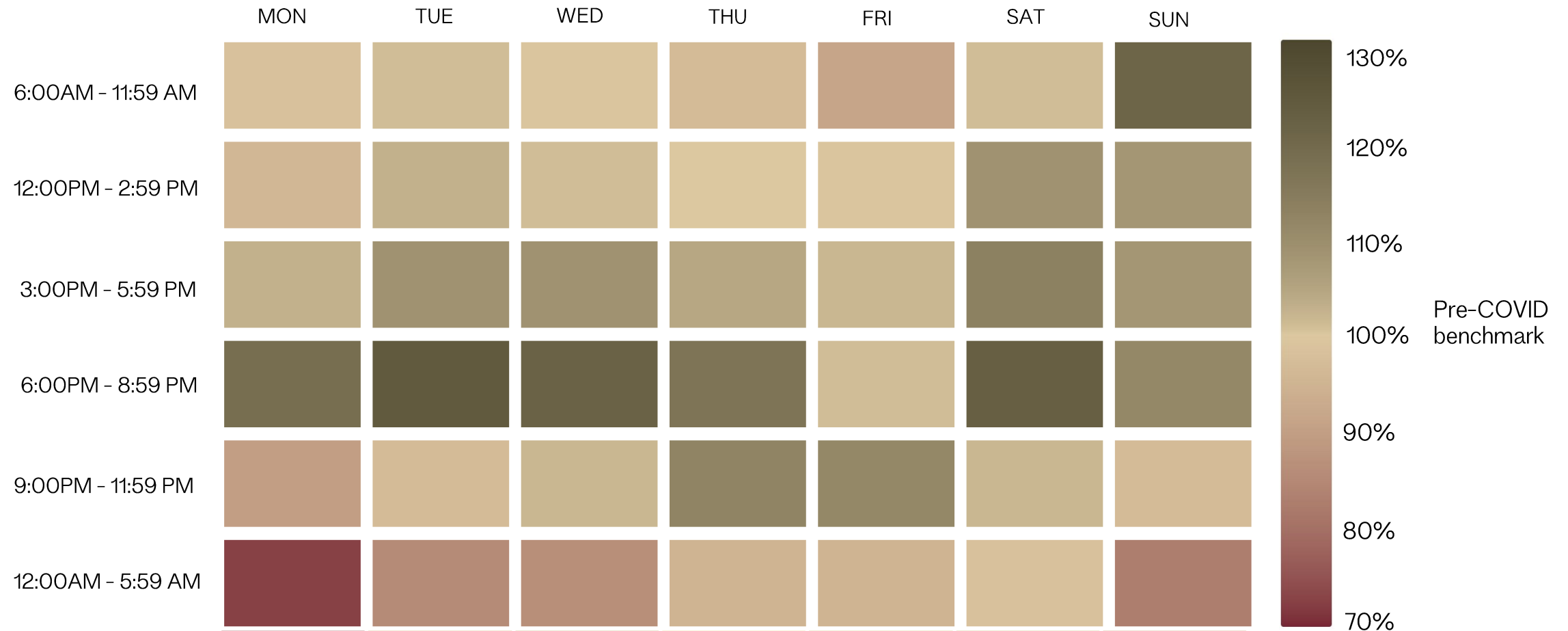
Source: Spendmapp by Geografia, like-for-like analysis compares the same days over the period with the same days of the corresponding period last year



Visitor expenditure by hour – City of Adelaide

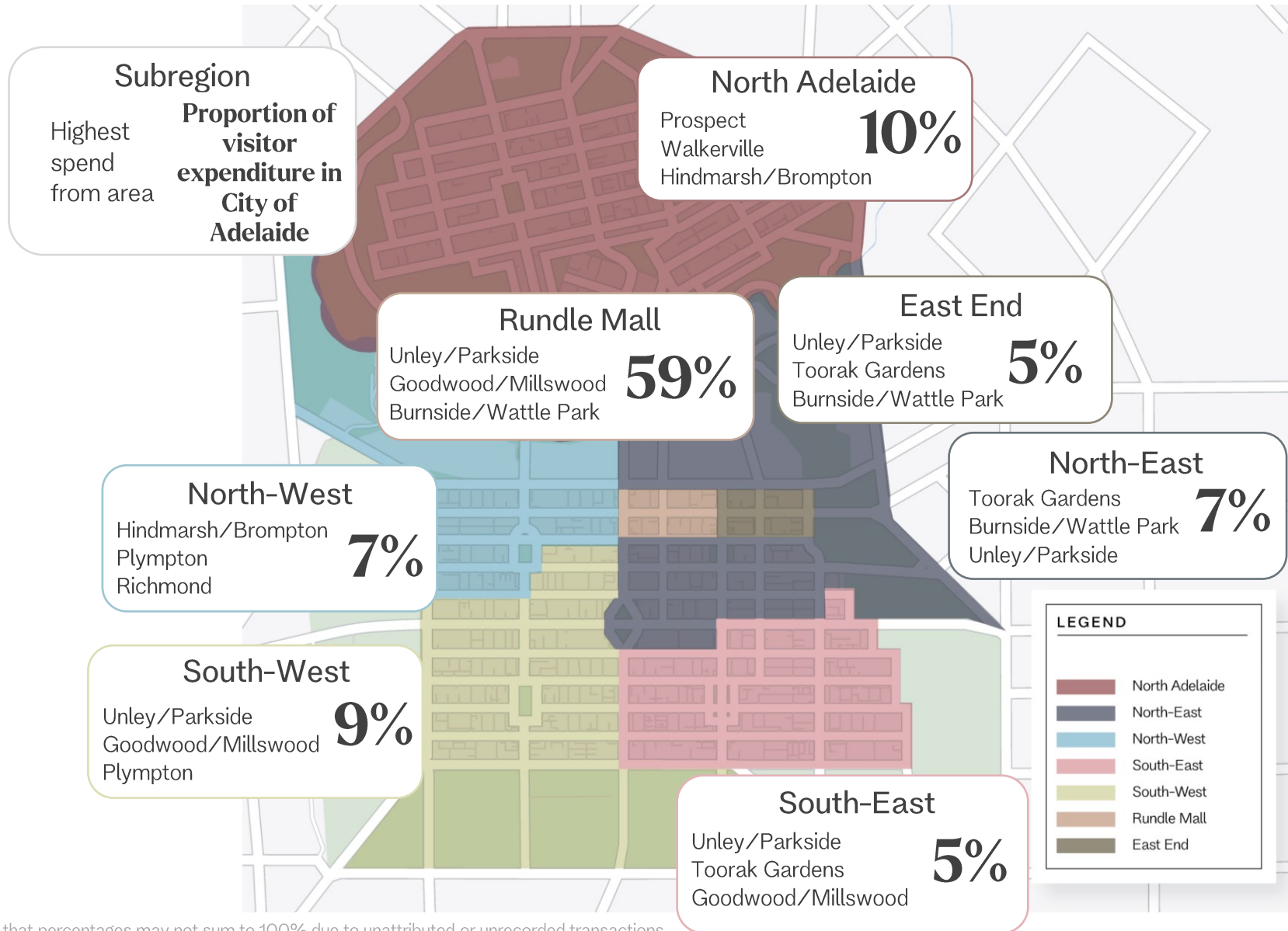
(Inflation Adjusted, Benchmarked to 2019 Levels, 12 Months to March 2026)

Weekends and weekday evening spending has exceeded pre-COVID levels, whilst overnight/early morning activity during weekdays continued to underperformed as seen in previous quarters.



Source: Spendmapp by Geografia

Visitor expenditure by subregion – Q1 2026



Source: Banking data, note that percentages may not sum to 100% due to unattributed or unrecorded transactions.

International expenditure – City of Adelaide



International spending reached record levels

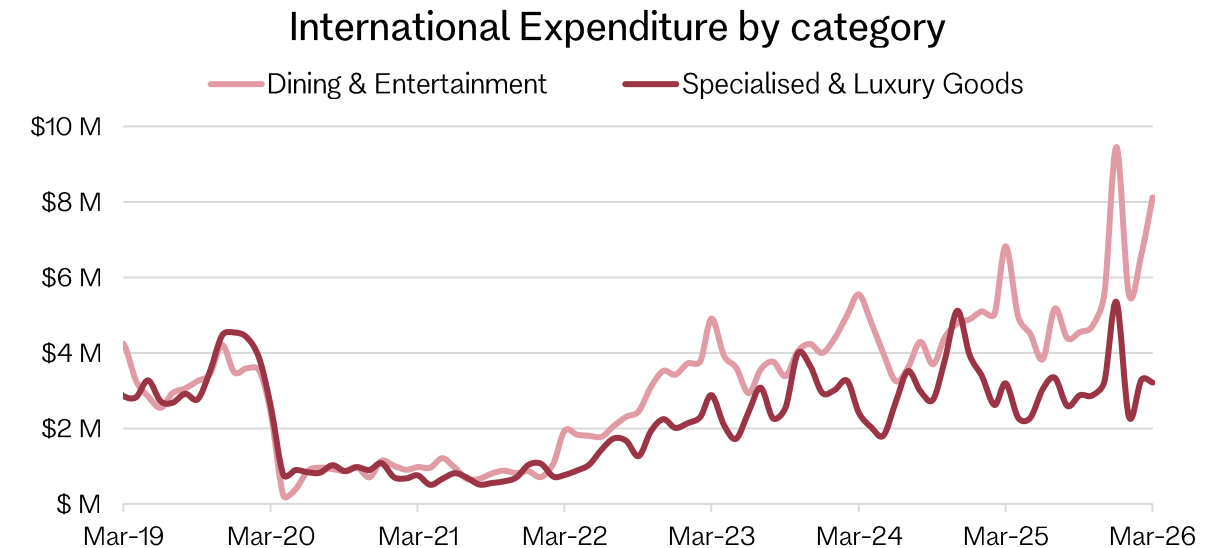
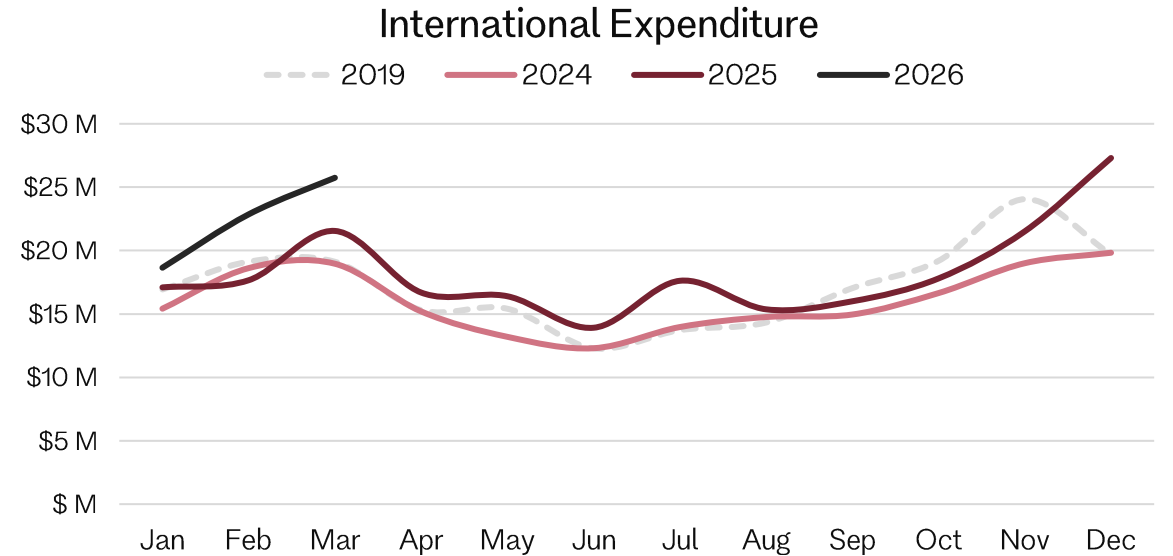
International Expenditure Q1

\$67M

+19% on Q1 2025

+1% on Q4 2025

- International spending accounted for 7% of total expenditure in the City of Adelaide during the quarter, highlighting the increasing contribution from overseas visitors to the city's spending mix.
- Expenditure peaked in March, increasing 19% year-on-year and surpassing pre-COVID levels when adjusted for inflation. This trend was supported by the sustained overseas visitation, likely induced by major events and Adelaide Airport's expanding international airline capacity.
- At a category level, dining and entertainment accounted for 47% of international spending, followed by travel-related services at 26%.
- Dining expenditure from international visitors grew by an additional \$3.3 million compared to Q1 2025, reaching \$20 million during the quarter. Spending on specialised food retailing recorded the highest category increase at 31% annually, aligning with high international visitation during the quarter.





Resident expenditure leakage – Q1 2026



To Greater Adelaide
\$50M

+6% on Q1 2025

39% of all spend went to supermarkets, groceries and other food retailing outside the City of Adelaide



Online platforms
\$38M

+7% on Q1 2025

41% spent on online retail (apparel + other discretionary retail)

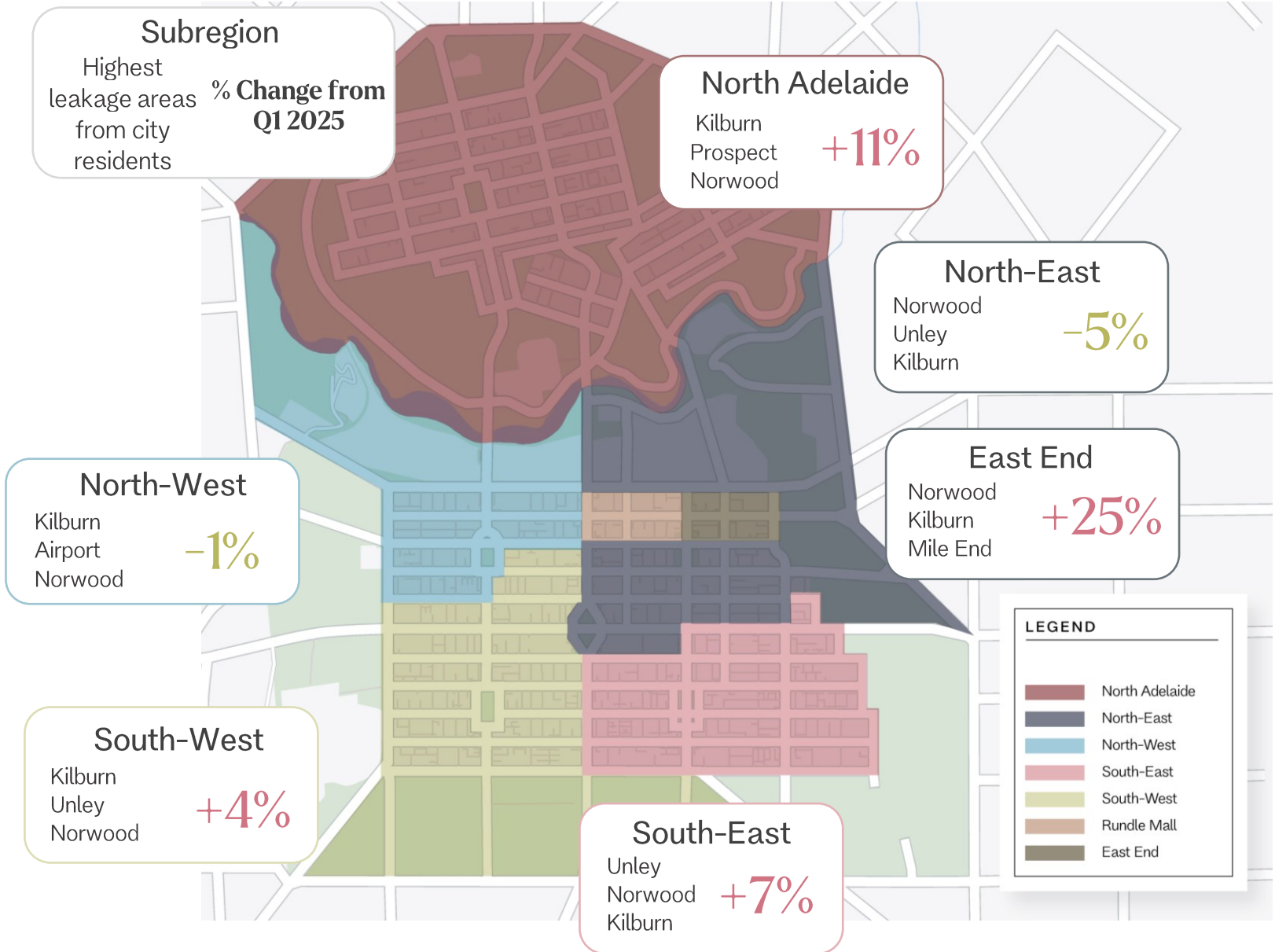


Other States
\$19M

+2% on Q1 2025

41% of resident expenditure to other states went to NSW

Resident external expenditure by subregion – Q1 2026



Source: Banking data



Foot traffic – City of Adelaide

Visitation remained event driven

Total Visitation Q1

30.6M

-12% on Q1 2025

-1% on Q4 2025

Unique visitors Q1

29.3M

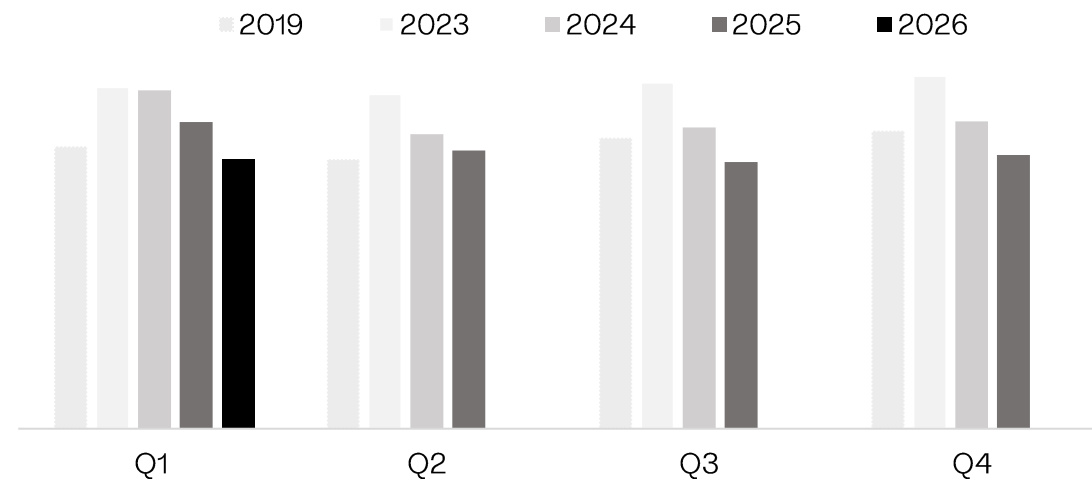
-11% on Q1 2025

-2% on Q4 2025

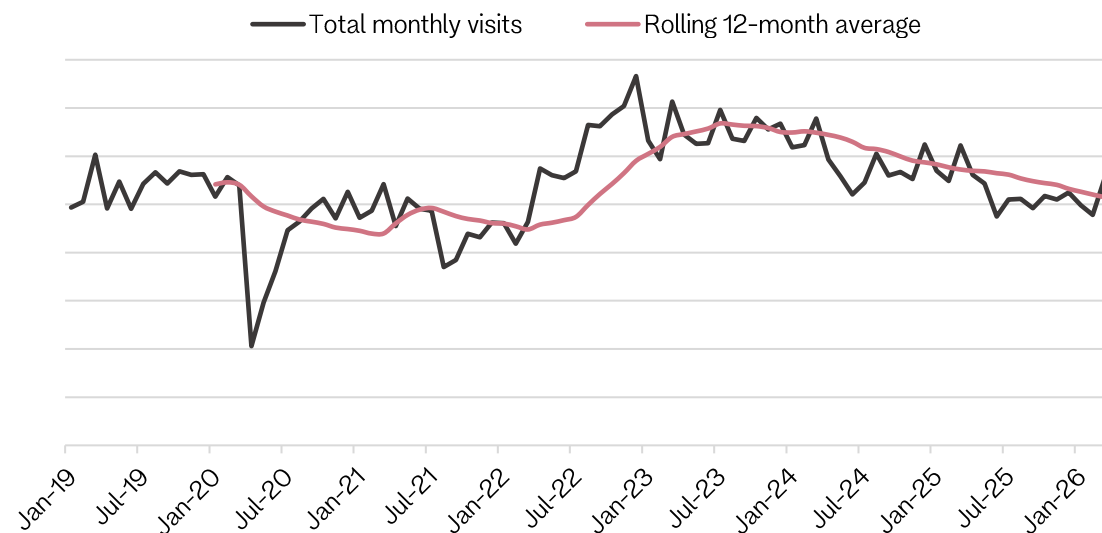
- Visitation patterns 12-months to March 2026 suggest a possible structural shift in visitation behaviour, with overall activity normalising from a post-pandemic peak in mid-2023.
- City-wide declines are primarily concentrated in commuter corridors, in contrast to destination-driven precincts, which are holding or growing year-on-year, a consistent trend with the ongoing adoption of flexible and hybrid working arrangements. Areas such as East End, Hutt Street, Rundle Mall, O’Connell Street recorded higher activity compared with Q1 2025, whilst more worker-dependent precincts experienced relatively weaker performance.
- City-wide visitation peaked during week starting 16 March, likely driven by overlap of March festivities and AFL premiership games, with weekly visitation 31% higher compared to year-to-date average. East End recorded 1.6 million visits during the Adelaide Fringe, increasing by 10% when compared to the event last year.
- All precincts experienced higher visitation during the Adelaide Fringe weekends (Fri-Sun) with O’Connell precinct recording the strongest uplift at 15%, followed by East End precinct at 7% higher compared to the same period last year.

Source: Kepler Analytics

Foot Traffic - Visits



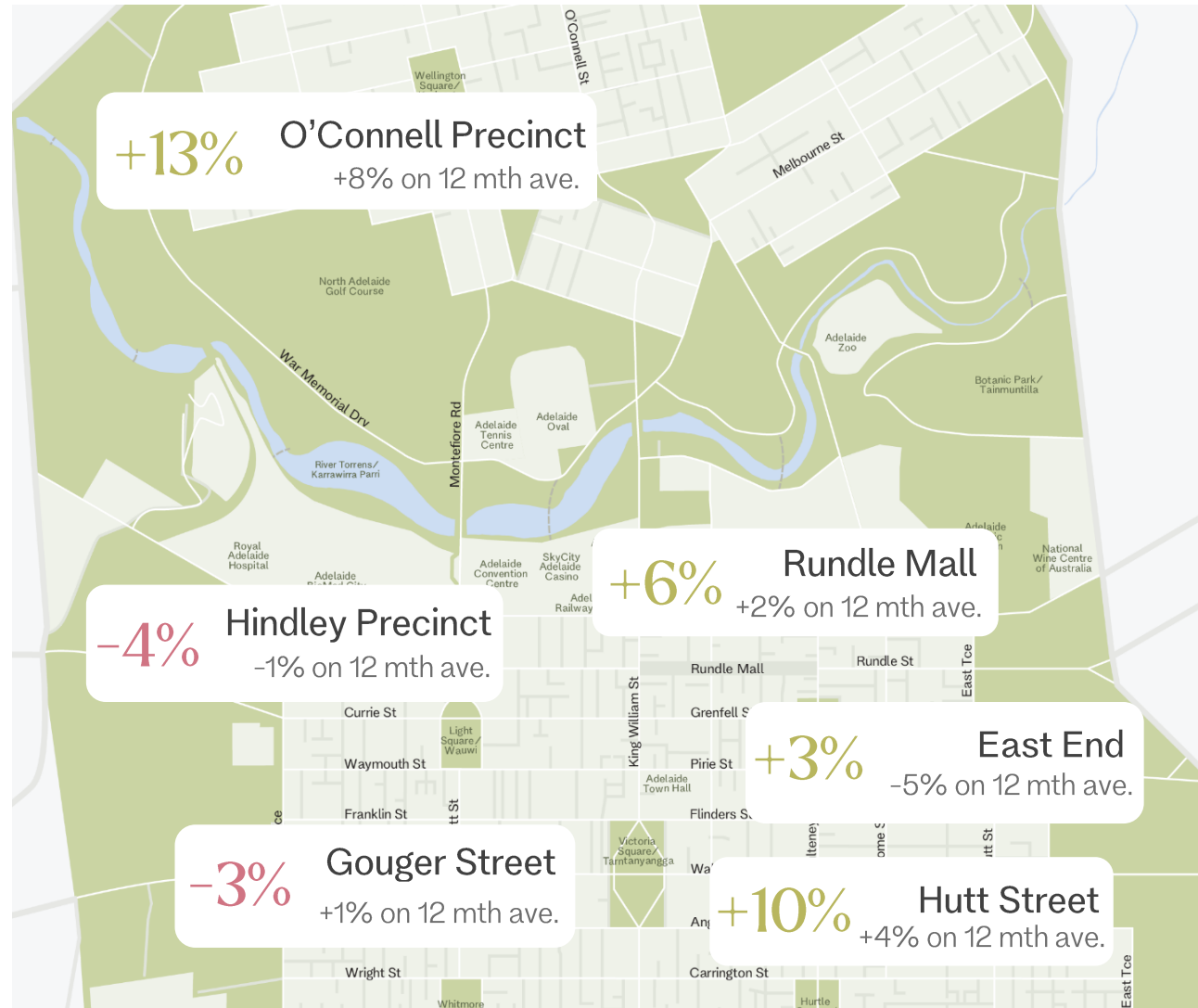
Foot traffic – Historic trends





Total visits by precinct – Q1 2026

(Like-for-like change from Q1 2025)



Source: Kepler Analytics, like-for-like analysis compares the same days over the period with the same days of the corresponding period last year



Parking transactions – City of Adelaide

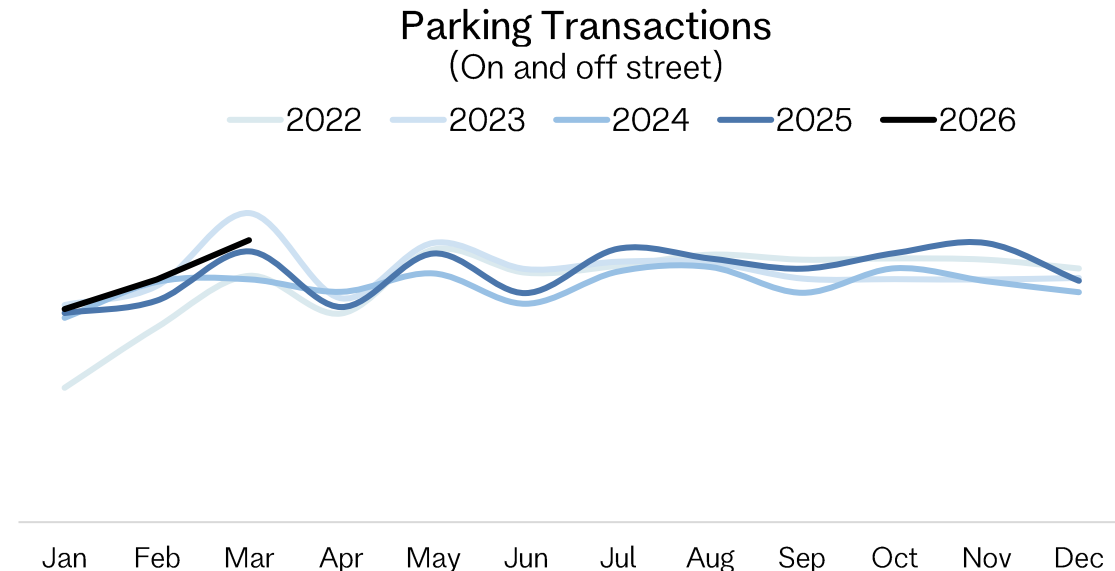
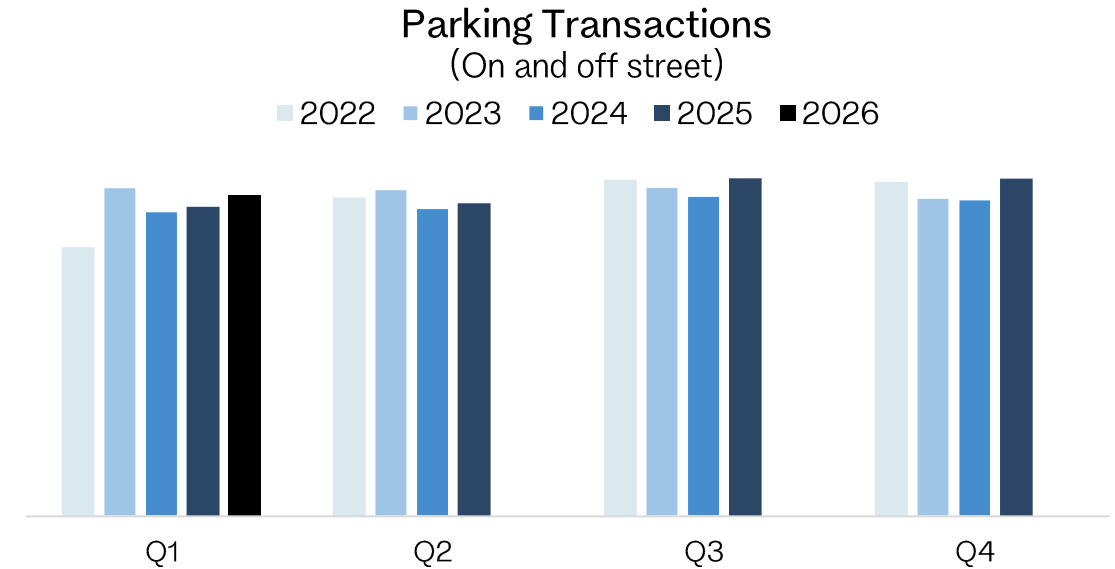
Parking transactions continued to improve

Parking transactions Q1

1.13M

+3% on Q1 2025
-5% on Q4 2025

- Overall parking (on and off street) transactions in Q1 2026 continued to surpass 2025 levels, recording the fifth consecutive quarter of year-on-year growth.
- Transaction activity peaked in March, 3% higher annually when compared like-for-like, supported by march festivities and major events. Parking during the Adelaide Fringe period was 5% higher compared to the event last year.
- Both weekend and weekday parking grew during the quarter, weekday (Monday to Thursday) transaction activity improved marginally by 1% year-on-year, whilst weekends (Friday to Sunday) increased by 6%.





Public transport transactions – City of Adelaide

Public transport reached record levels

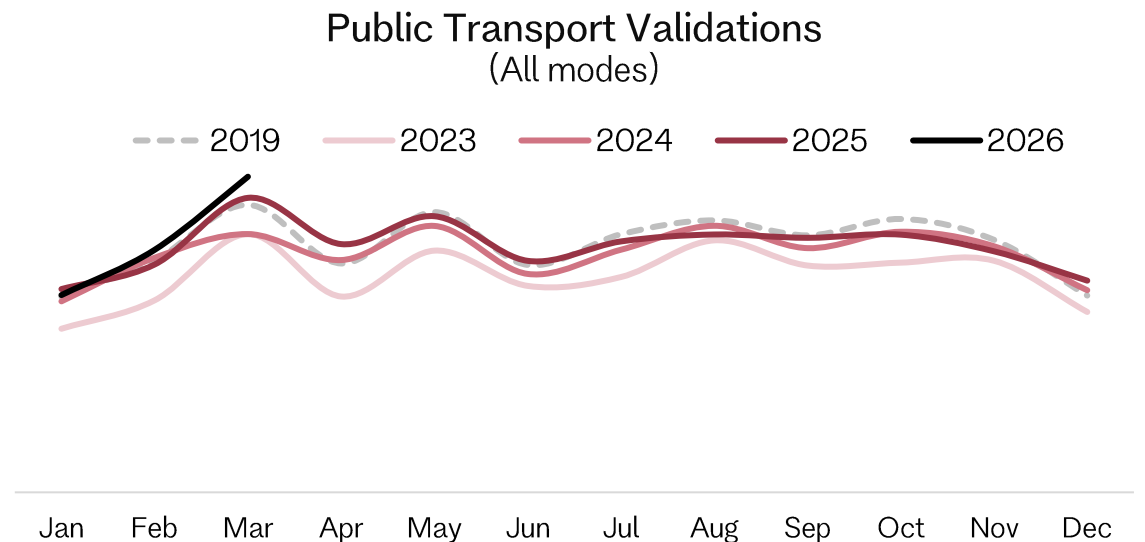
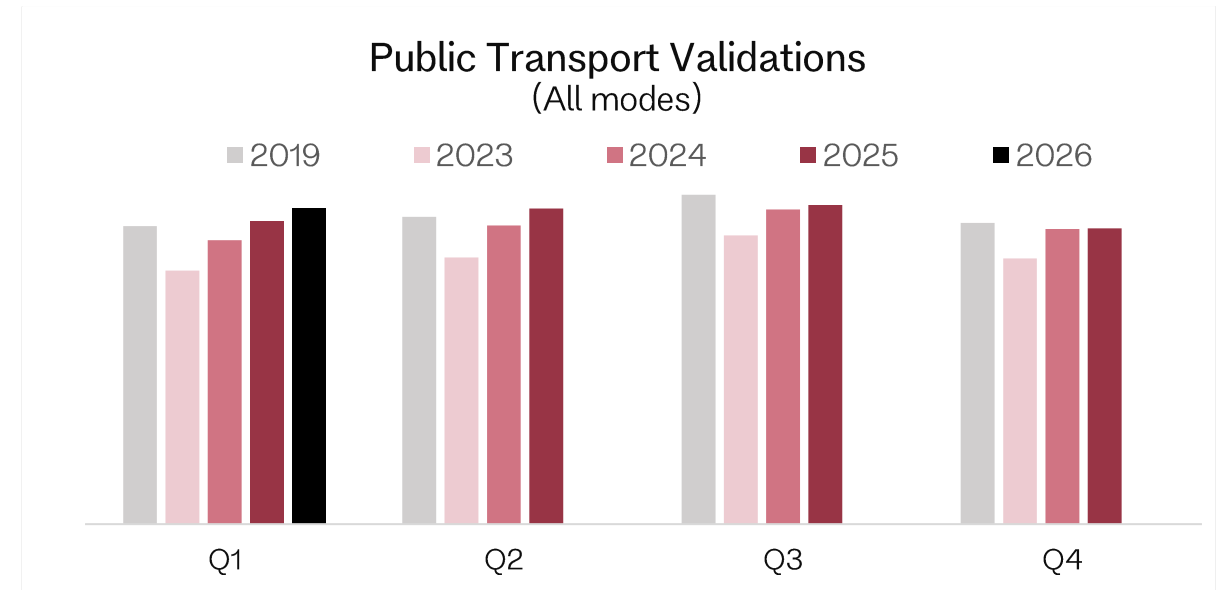
Public Transport Validations Q1

4.05M

+3% on Q1 2025

+6% on Q4 2025

- Public transport validations include Adelaide Railway Station entries and bus & tram tap-ons across the City of Adelaide.
- Public transport usage reached record levels during the quarter, higher than the same period last year and surpassing pre-COVID usage by 6%.
- Validations followed their typical seasonal patterns, starting the year 17% below the rolling 12-month weekly average as workers and students were away, before rebuilding through February and peaking in March at 28% above the 12-month average.
- Ticket validations were 5% higher during the Adelaide Fringe period.
- Weekday and weekend trends aligned, with weekday (Mon-Thu) validations increasing by 3% compared with Q1 2025, whilst weekend (Fri-Sun) usage increased 4% over the same period.



E-Transport trips – City of Adelaide

E-Transport usage continued to decline

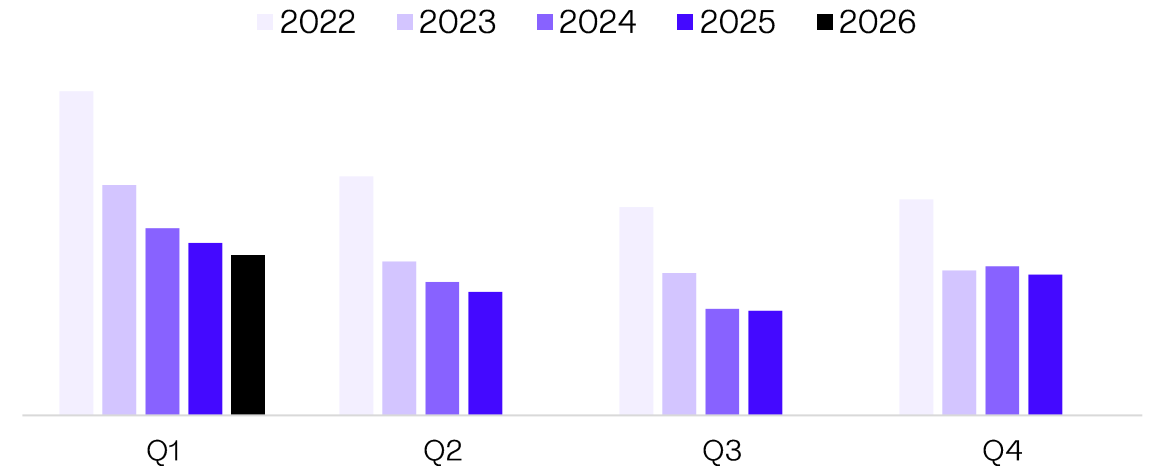
E-Transport trip starts Q1

152k

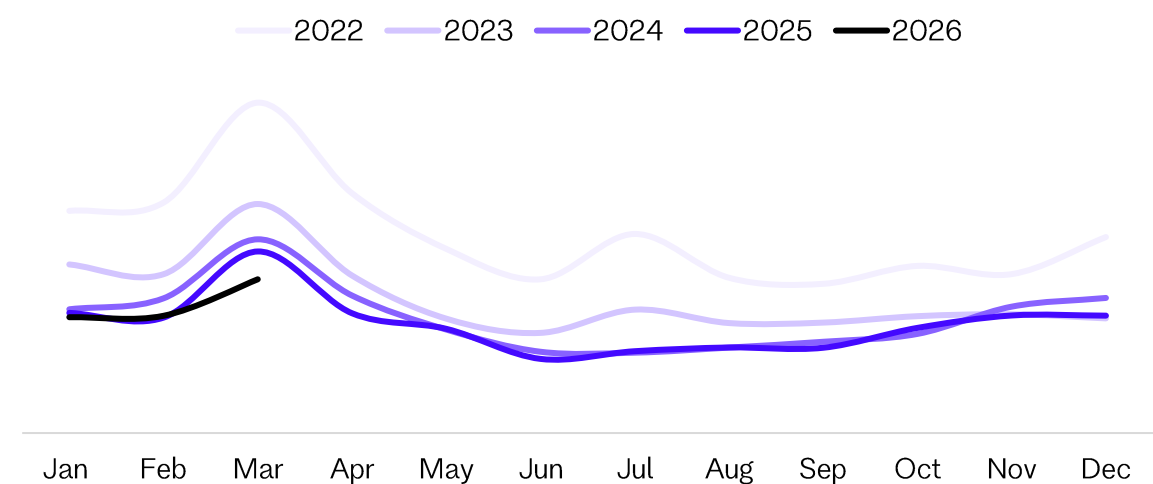
-5% on Q1 2025
+14% on Q4 2025

- E-transport usage remains subdued, declining compared to Q1 2025, although up slightly from the previous quarter.
- January was the only month to record marginal annual growth at 1%. March recorded highest usage, although trip starts were still 15% lower than last year on a like-for-like basis.
- The busiest week occurred in the first week of March, aligning with the convergence of Adelaide Fringe, WOMADelaide and Ed Sheeran's concert, reinforcing that while baseline usage continues to decline, major events can still generate meaningful short-term spikes in usage.

E-Transport Trips



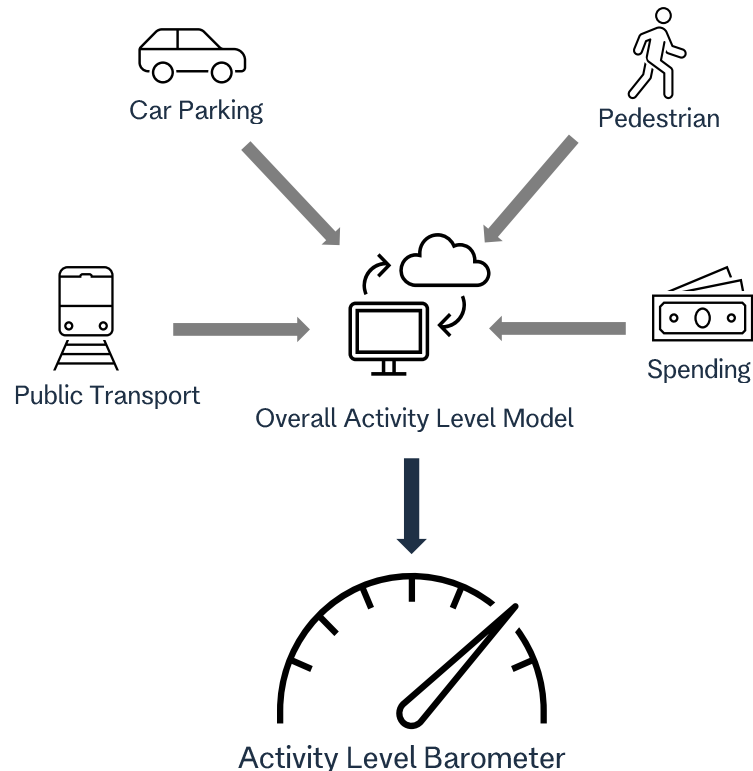
E-Transport Trips





Appendix – AEDA Activity Model

- The Activity Model combines the activity metrics (refer figure below) using a statistical model to create an overall score and visualisation for activity levels within the City of Adelaide LGA area.
- As every individual interacts with the city in their own unique way, the Activity Model accounts for all users and encompasses this using a weighting system and a unique methodology.



- The model follows a clear five-step process. It begins by bringing together all datasets by date, followed by exploratory analysis to clean the data and resolve any inconsistencies. To ensure fair comparison across variables with different units or scales, the data is then normalised and scaled.
- Weights for each variable are determined using Principal Component Analysis (PCA), which highlights the most influential inputs in the dataset. These weights are applied to the scaled variables to calculate a daily activity score, standardised on a 100-point scale.
- Monthly and quarterly averages are then computed, indexed against the highest-performing month to create a consistent benchmark. To ensure meaningful comparisons and minimise seasonal bias, the model uses data from January to December 2023 for its baseline.

Limitations

- Number of off-street parking transactions do not signify the number of occupancies. The parking data used in the model provides information on the number of parking transactions made but it does not necessarily indicate the number of vehicles parked the city as free parking occurs. This means that the data may not accurately reflect the total estimate of parking.

Need More Data?

If you have a specific data or research request, please scan the QR Code and complete the form at the bottom of the AEDA Data & Insights web page:



aedasa.com.au



Disclaimers

All effort is made for representations to be true and accurate at the time of dispatch, although historical figures may change, and information contained in this document should be treated sensitively and not used wholly for investment decisions.

Spendmapp aggregates data from EFTPOS transactions then extrapolates this to provide an accurate picture of expenditure activity for the region. There is a complex process of ensuring outlier transactions do not skew the data and to also maintain the privacy of merchants and cardholders by masking data at low level merchant and transaction volumes. Note that both dollar values and the number of transactions are transformed to account for non-card transactions, although online spending is not weighted for cash transactions. To calculate the real growth rates, CPI statistics were sourced from the [ABS website](#).

Foot-traffic counts are measured through various tools that do not explain complete city visitation. The pedestrian figures represents a sample of people and should be viewed as a best estimate and used from trend analysis. Figures may change over time as sensors go offline and the technology recalibrates historic data.

Public transport ticket validations are a combination of Adelaide Railway Station entries, bus and tram tap-ons in the City of Adelaide, provided by the Department of Infrastructure and Transport.

Parking is an aggregate of both on-and-off street parking, provided by the City of Adelaide.

E-scooter data is an aggregate of Beam and Neuron, provided by Ride Report.

Results from AEDA Activity Model/Forecasting Model are provisional and are potentially subject to change as additional data becomes available. This helps in managing the dynamicity of the data by providing the timeframe to which the results correspond.



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