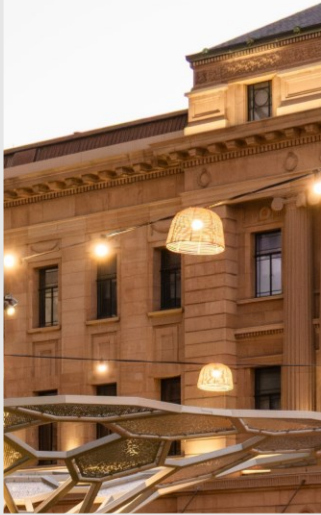


AEDA Insights

Activity Report

Q1 2025 (January - March)







Summary of Findings

- Overall activity levels for the quarter in the City of Adelaide remained steady year-on-year, with only a marginal 1-point decline from the previous quarter. Despite a drop in foot traffic, minor uptakes across expenditure, transport, and parking transactions helped sustain activity levels. Major events had a positive impact during their peak periods, boosting visitation and economic activity, however, the city was quieter outside these event windows.
- Following record-high spending in Q4 2024, Q1 2025 exhibited the usual seasonal moderation but maintained year-on-year stability, suggesting underlying economic resilience in city activity. Citywide momentum was reinforced by a vibrant events calendar, including the Tour Down Under, LIV Golf, the Adelaide Fringe, the Adelaide Festival, and Colours of Asia Festival.
- March emerged as the strongest month, driven by worker and student returns alongside major events. The quarter's busiest day was Friday, 7 March, driven by the overlap of events including WOMADelaide and the second weekend of the Adelaide Fringe, with additional peaks during key festival days.
- Total nominal expenditure grew 2% on Q1 2024, though typical seasonal softening saw a 13% decline from Q4 2024. Visitor-driven activity remained the key contributor to growth, particularly during the festival season. On the contrary, local resident expenditure in the city fell for the fourth consecutive quarter.
- An additional \$13 million was injected into the City of Adelaide during this year's festival season, a 4% increase compared to festival season of 2024. Consumer spending during the LIV Golf weekend reached \$37 million, reflecting the extended economic spillover of major events beyond their host locations and into the City of Adelaide.
- Night-time expenditure (NTE) increased marginally by 1% on Q1 2024. Entertainment led growth with a 92% annual uplift, whilst bars, clubs and dining expenditure experienced marginal declines on Q1 2024. However, the festival season weekends supported weekend NTE activity.
- Foot traffic declined year-on-year, yet the festival season lifted visitation 15% above the 12-month average. Rundle Mall recorded its busiest weekend on record, while the East End saw a 41% increase in weekend footfall compared to 2024, and the West End rose 13%.
- Parking activity rose 4% above the 12-month average, with March performing strongest (+13% year-on-year). Parking during the festival season was 7% higher than in 2024, 18% above the annual average. On-street volumes held steady year-on-year.
- Public transport activity continued its upward trajectory, with weekend validations reaching 118% of 2019 levels. March recorded the highest activity since 2019. Weekend and weekday validations rose 11% and 4% respectively, year-on-year.
- Easing inflation and anticipation of further interest rate cuts have begun to lift consumer confidence well above the benchmark (BankSA State Monitor), moderation is anticipated to alleviate some pressure on household budgets, potentially boosting consumer spending. This, combined with rising real wages and energy relief measures, would likely support discretionary expenditure in the coming quarters.



Key Activity Metrics – Q1 2025

(Like-for-like change from Q1 2024)

		Q1 2025	January	February	March
Total Visits (All combined sensors)		-8%	-8%	-10%	-7%
Expenditure (Nominal)		+2%	-1%	0%	+9%
Public Transport (All modes validations)		+1%	-4%	-5%	+12%
Parking (On + Off Street validations)		+2%	-4%	-2%	+13%

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



Overall Activity Levels – City of Adelaide

Overall activity holds firm year-on-year

Activity Score – Q1 2025

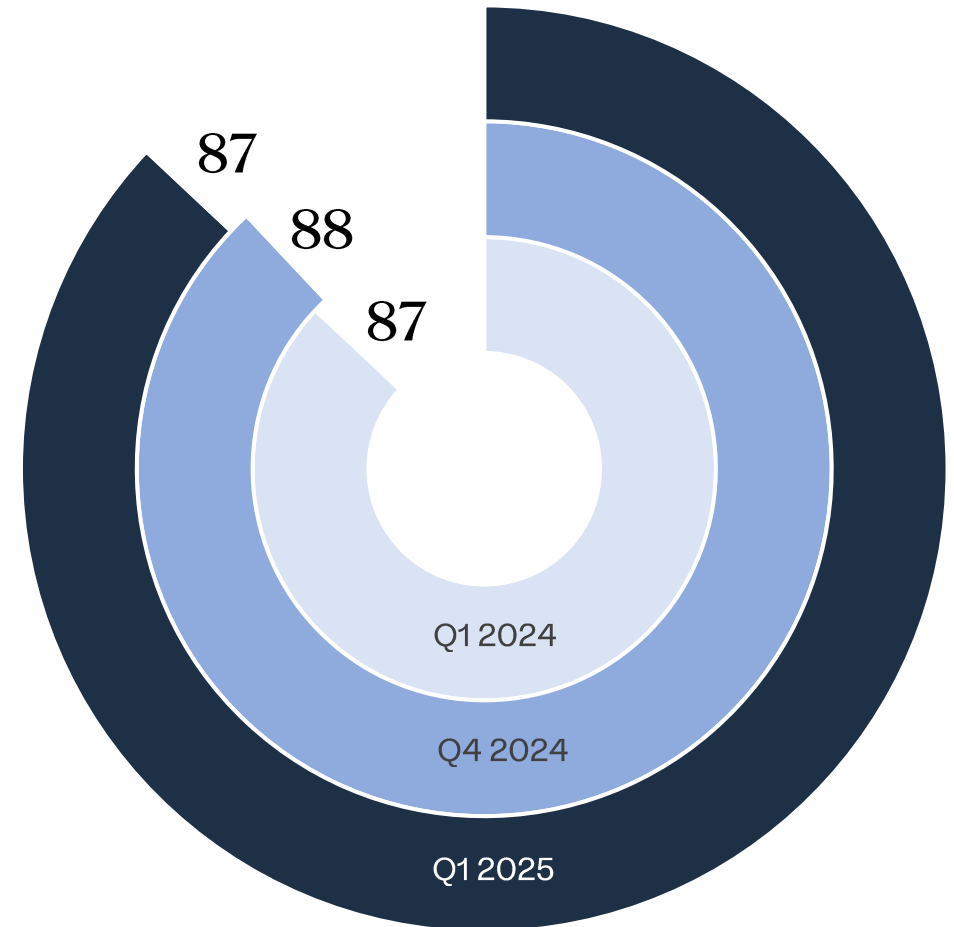
87

0 pts on Q1 2024

-1 pts on Q4 2024

- Combining all indicators statistically, overall activity levels remained comparable year-on-year, and declined marginally by 1 point from the previous quarter (refer to appendix for methodology).
- Major events such as the Tour Down Under , LIV Golf (taking place in February this year), Colours of Asia, and the Adelaide Fringe helped sustain elevated activity throughout the quarter.
- March was the busiest month of the quarter, boosted by event activity and the return of university students. The quarter’s busiest day was Friday, 7 March, driven by the overlap of events including WOMADelaide and second weekend of Adelaide Fringe, followed by Friday March 21. Other peak days included 24 January (Tour Down Under) and 28 February (Fringe opening weekend).

Overall Activity Scores

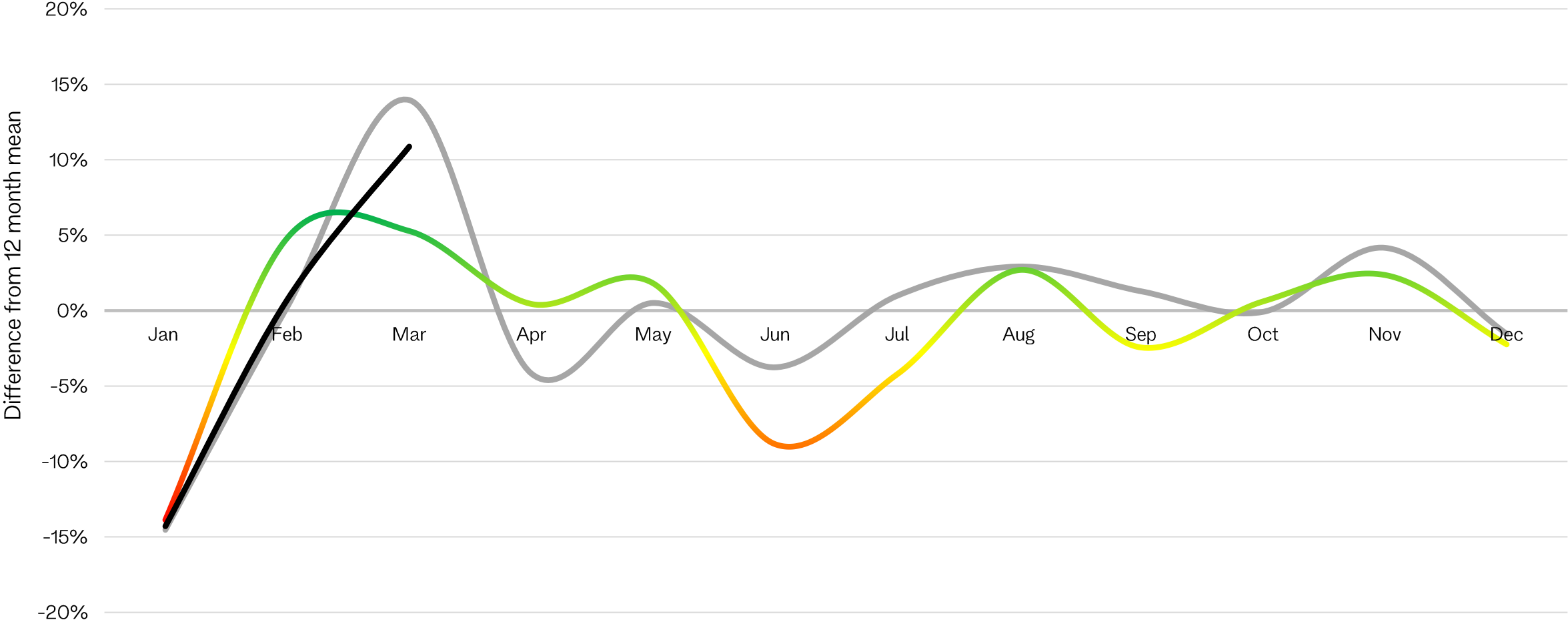


Activity Levels – City of Adelaide



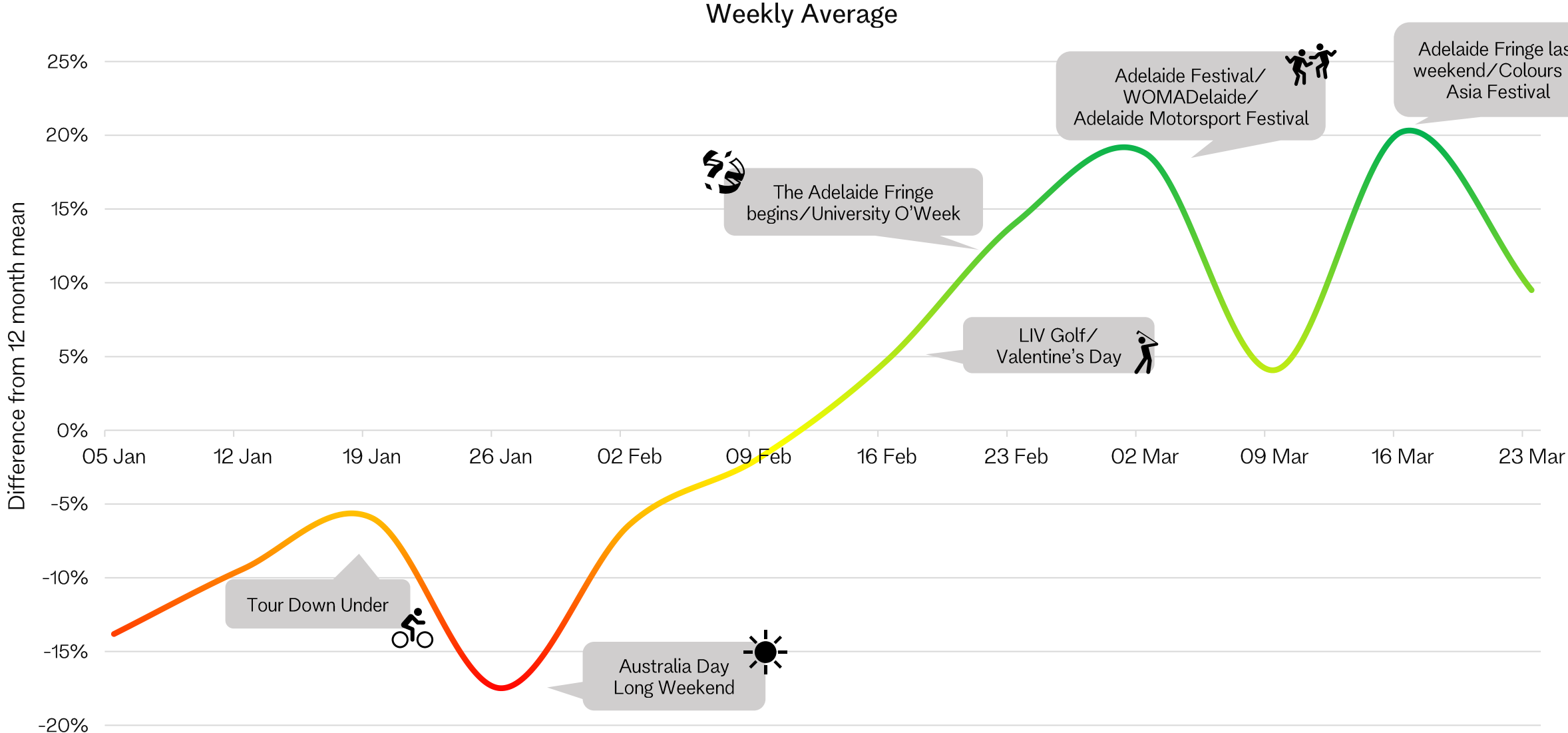
Monthly Year-on-Year Comparison

— 2023 — 2024 — 2025



Source: AEDA Modelled Activity

Activity Levels – City of Adelaide



Source: AEDA Modelled Activity



Expenditure – City of Adelaide

Record March lifts city expenditure

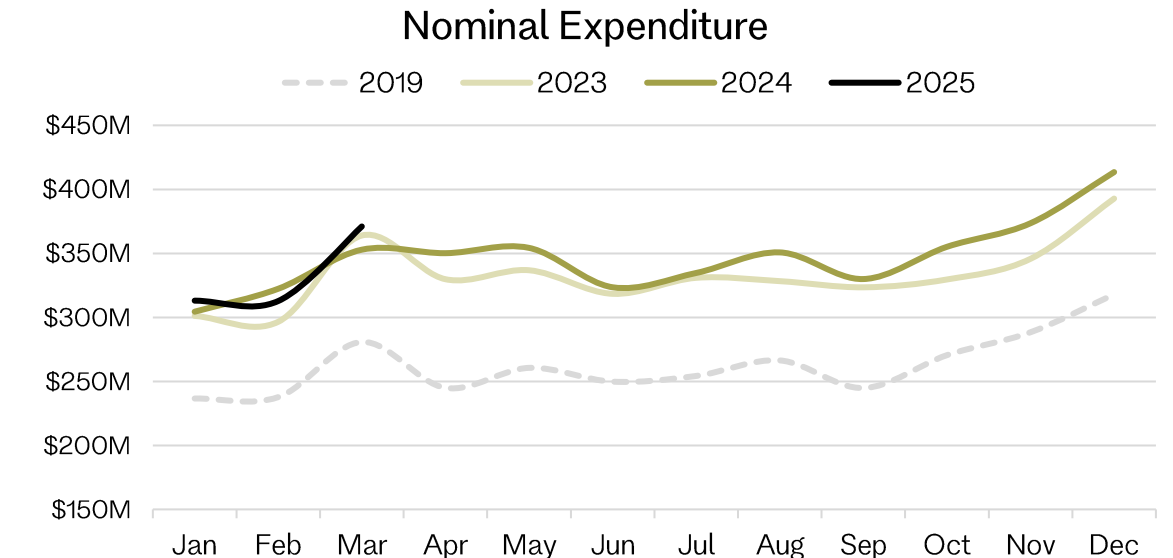
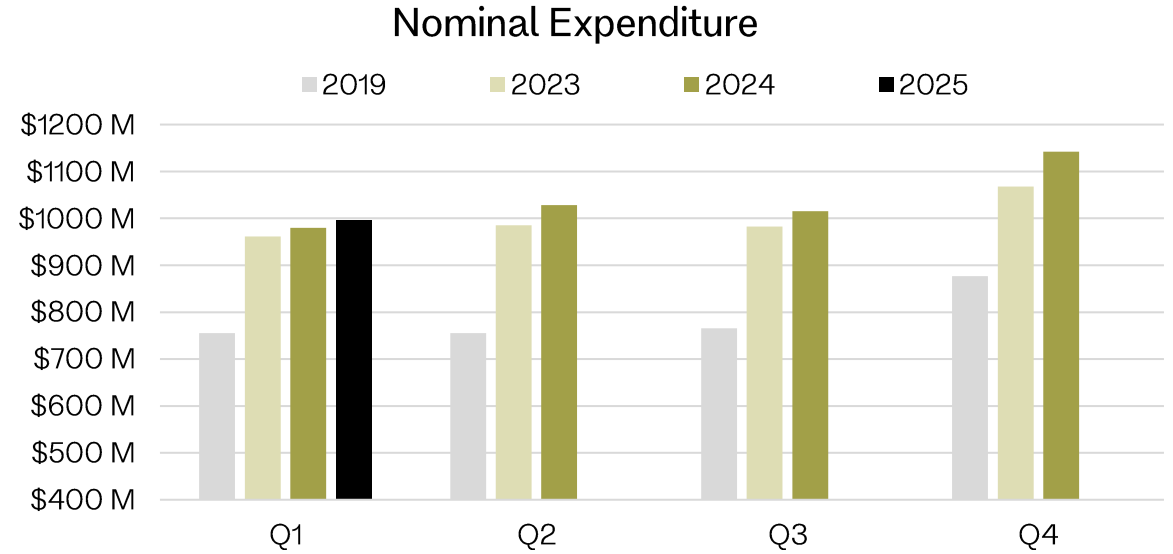
Total Nominal Expenditure Q1

\$997M

+2% on Q1 2024

-13% on Q4 2024





- Total nominal expenditure rose 2% compared to Q1 2024, though it was down 13% compared to the high of Q4 2024, reflecting the typical post-holiday season softening.
- March marked the strongest month in the quarter, with growth across all major categories, reversing two slower months and highlighting renewed momentum in city spending.
- An additional \$13 million was spent in the City of Adelaide during this year's festival season, marking a 4% year-on-year increase compared to same period in 2024. Consumer spending during the LIV Golf weekend totalled \$37 million, reflecting the spillover of major events.
- Work hour activity increased compared to Q1 2024, likely an indication of more students and workers in the city, whilst resident spend continues to decline year-on-year.



Expenditure – City of Adelaide



(Like-for-like change from Q1 2024)

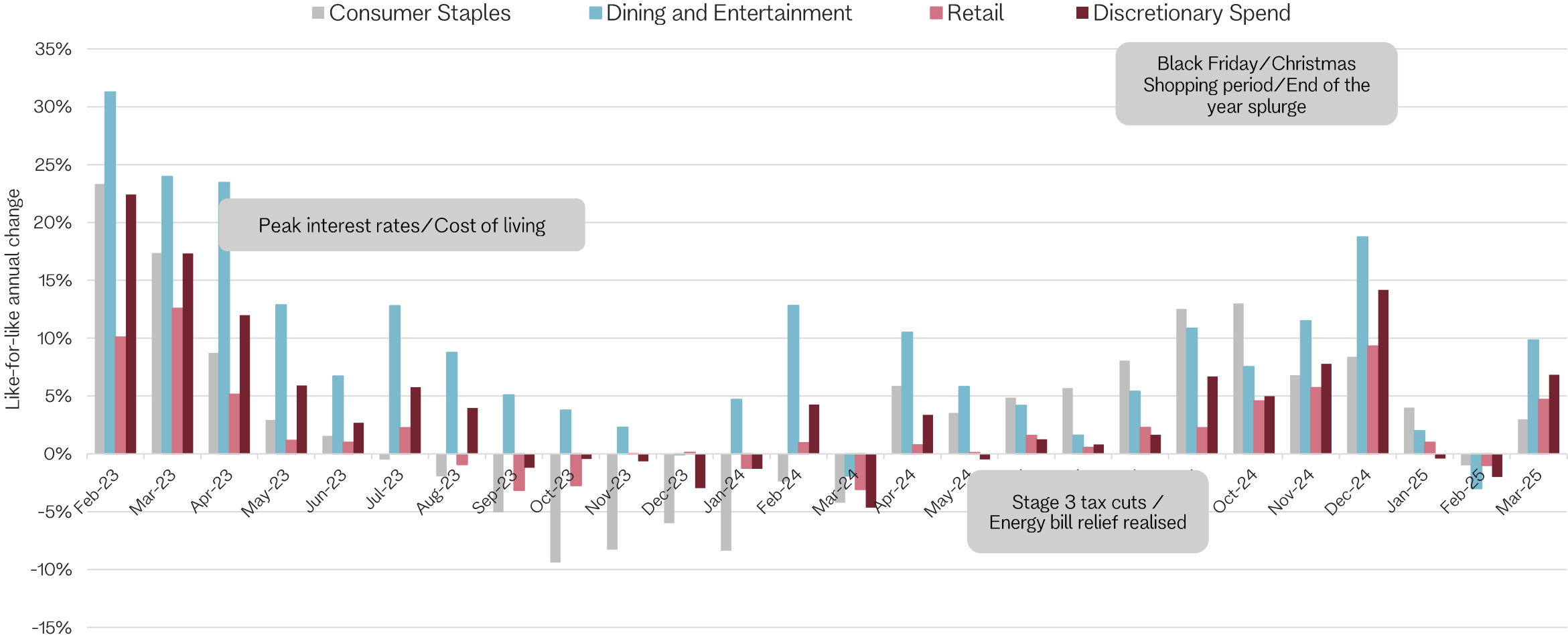
	Q1 2025	January	February	March
Night-Time (6pm – 6am) 	+1%	+3%	-7%	+6%
Work Hour (8am – 6pm, Mon-Fri) 	+2%	-3%	+2%	+6%
Resident (internal inside CoA boundary) 	-2%	-7%	-2%	+2%
Resident (to other suburbs outside CoA) 	0%	+7%	-6%	-2%

Expenditure – City of Adelaide

(Like-for-like annual change)



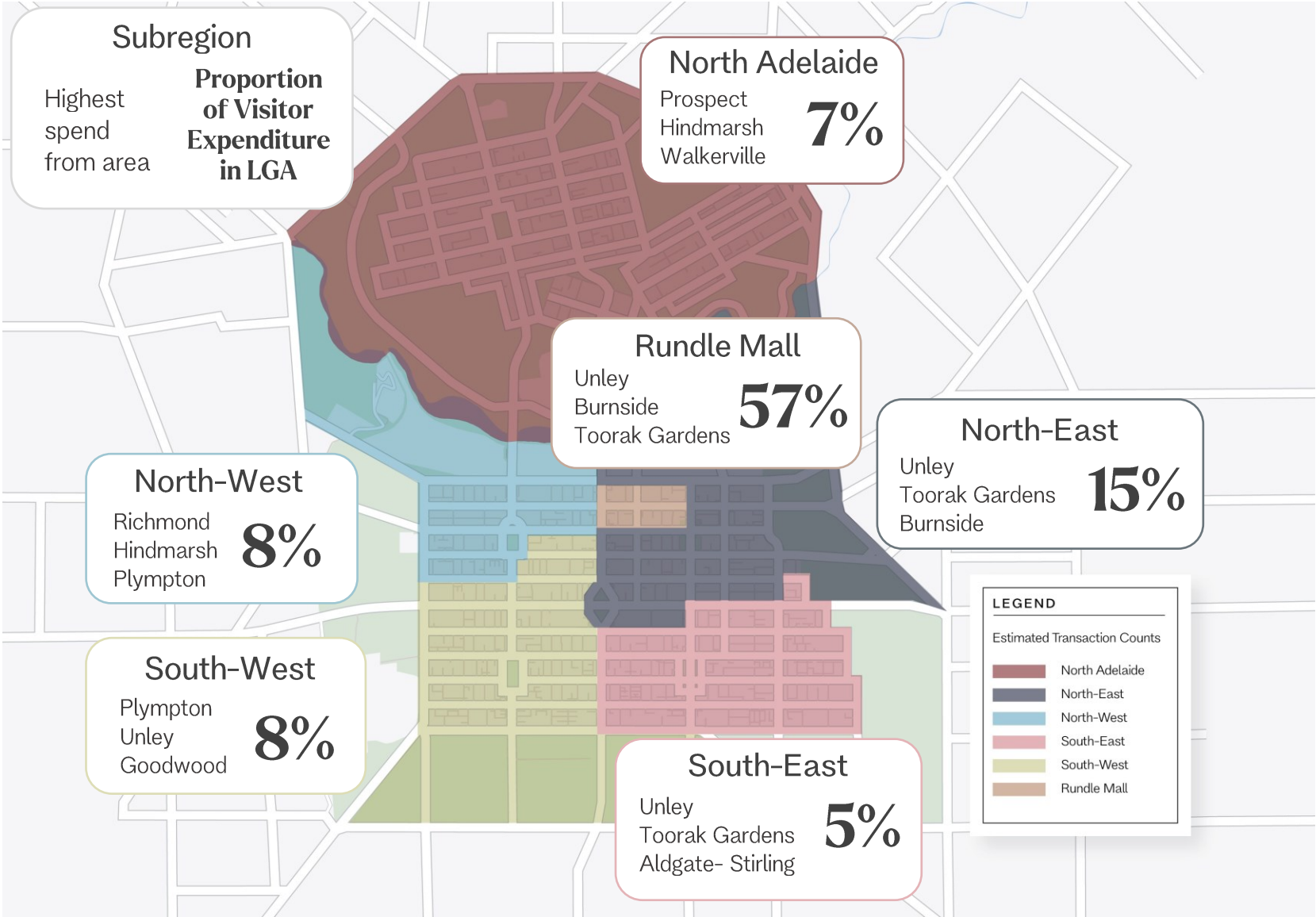
Monthly Year-on-Year Comparison



Source: Spendmapp by Geografia

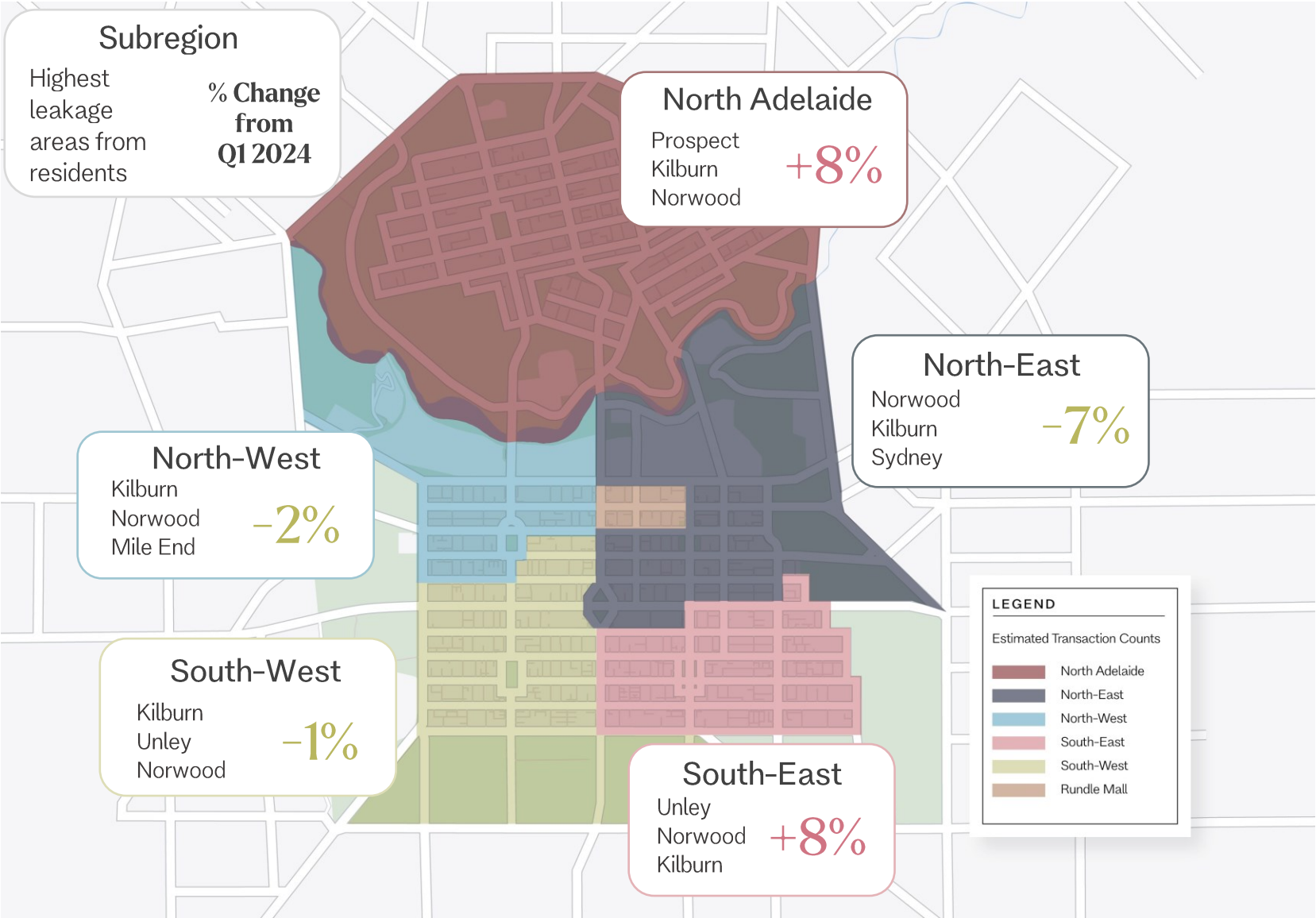
Like-for-like analysis compares the same days over the period with the same days of the corresponding period last year

Visitor Expenditure by Sub Region – Q1 2025



Source: Banking data

Resident External Expenditure by Sub Region – Q1 2025



Source: Banking data



Night-Time Expenditure – City of Adelaide

Entertainment spending drives night-time economy

Total Nominal Expenditure Q1

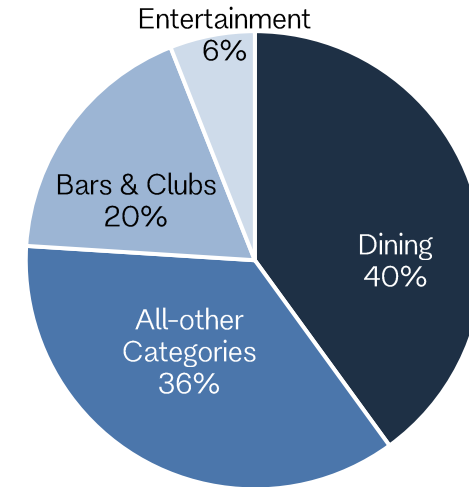
\$261M

+1% on Q1 2024

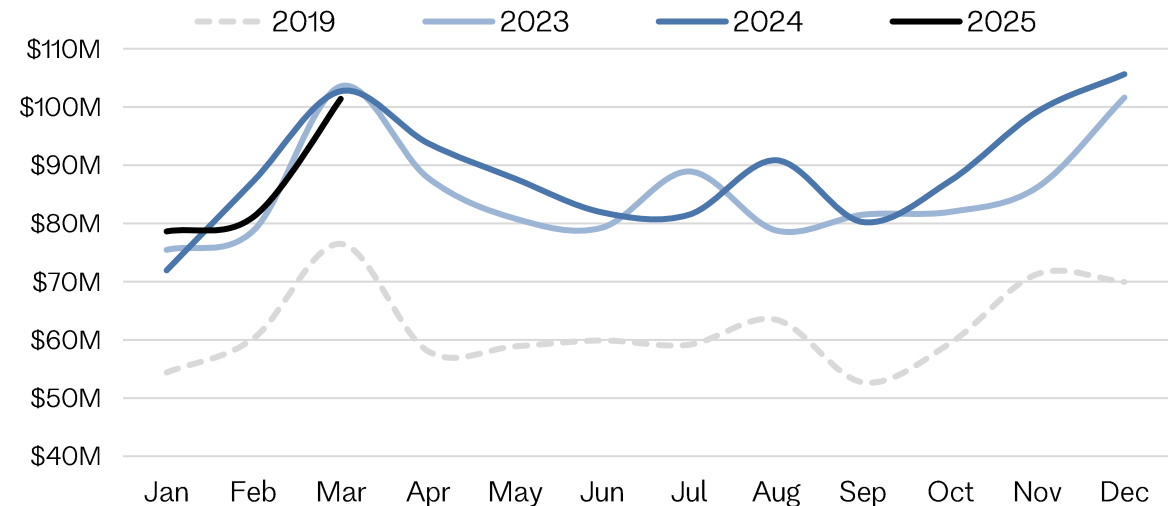
-11% on Q4 2024

- Total nominal NTE rose 1% on Q1 2024 but remained 11% below the peak levels recorded in Q4 2024, reflecting typical seasonal trends.
- March was the strongest month whilst February was the weakest month of the quarter, with year-on-year declines across all night-time categories, even on a like-for-like basis.
- Entertainment was the fastest-growing category, with average spending increasing 92% year-on-year. This includes a broad mix of activities such as live music, cinemas, sports clubs, arcades, and casinos.
- Entertainment increased its share of overall night-time expenditure whilst bars and clubs expenditure saw a slight decline in the share. Dining maintained a consistent share.
- During the festival season, overall night-time spend declined by 1%, likely due to visitors shifting their spend to venues such as Gluttony and the Garden, which may not be captured in sample of spending data.

Proportion of Categories



Night-Time Nominal Expenditure



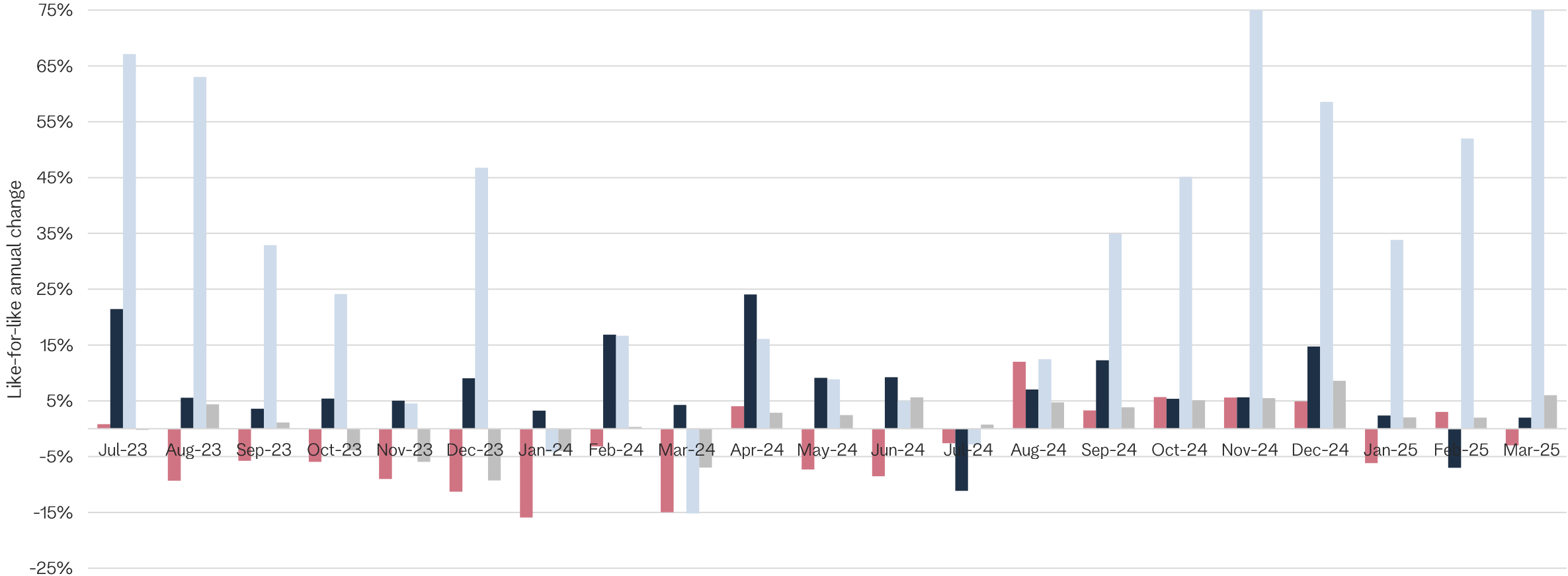
Night-Time Expenditure – City of Adelaide

(Like-for-like annual change)



Monthly Year-on-Year Comparison

■ Bars and Clubs ■ Dining ■ Entertainment ■ All other categories



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



Foot Traffic – City of Adelaide

Visitation boosted by festival and events

Total Visitation Q1

34.8M

-8% on Q1 2024
0% on Q4 2024

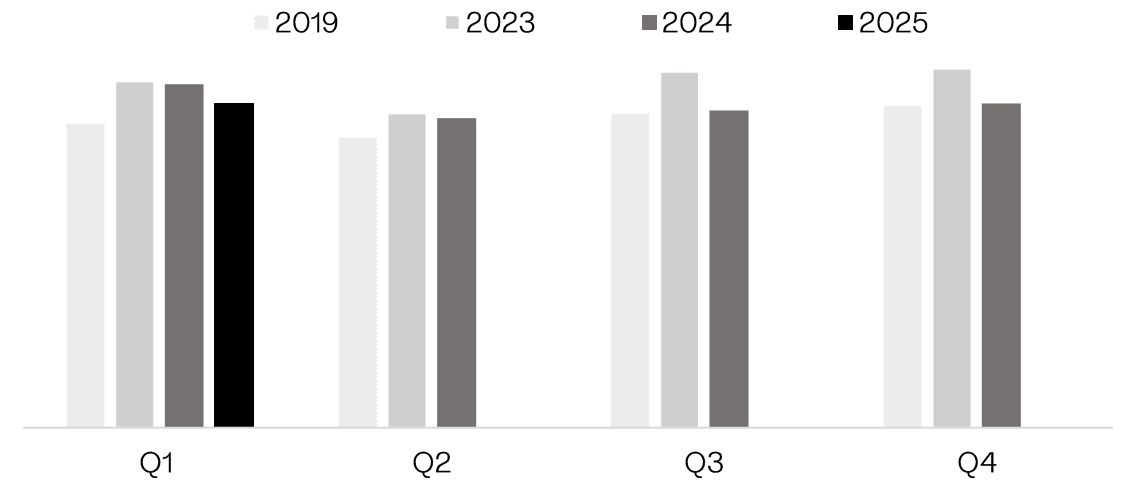
Unique visitors Q1

32.7M

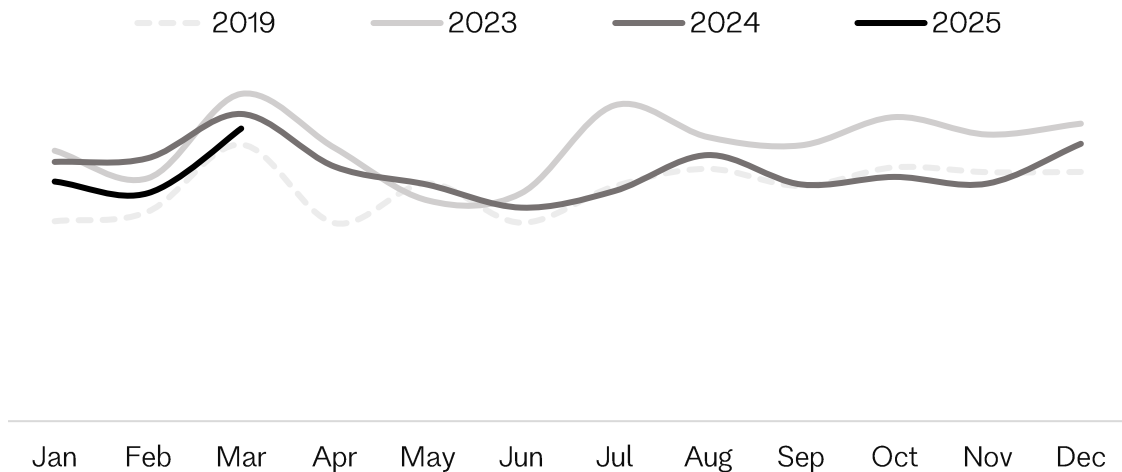
-5% on Q1 2024
0% on Q4 2024

- Citywide foot traffic fell year-on-year, despite a seasonal lift during the festival season. Across the festival season, foot traffic rose 15% above the 12-month average.
- Rundle Mall recorded its busiest weekend on record during the Colours of Asia festival, drawing over 680,000 visitors, a 47% increase on the 12-month weekend average.
- The East End precinct welcomed 556,000 more visitors during this year's festival season compared to same period in 2024. Weekend foot traffic rose 41% on last year and 72% above the precinct's 12-month average.
- The West End also saw growth, with visitation during the festival season 13% higher compared to 2024.

Foot Traffic - Visits



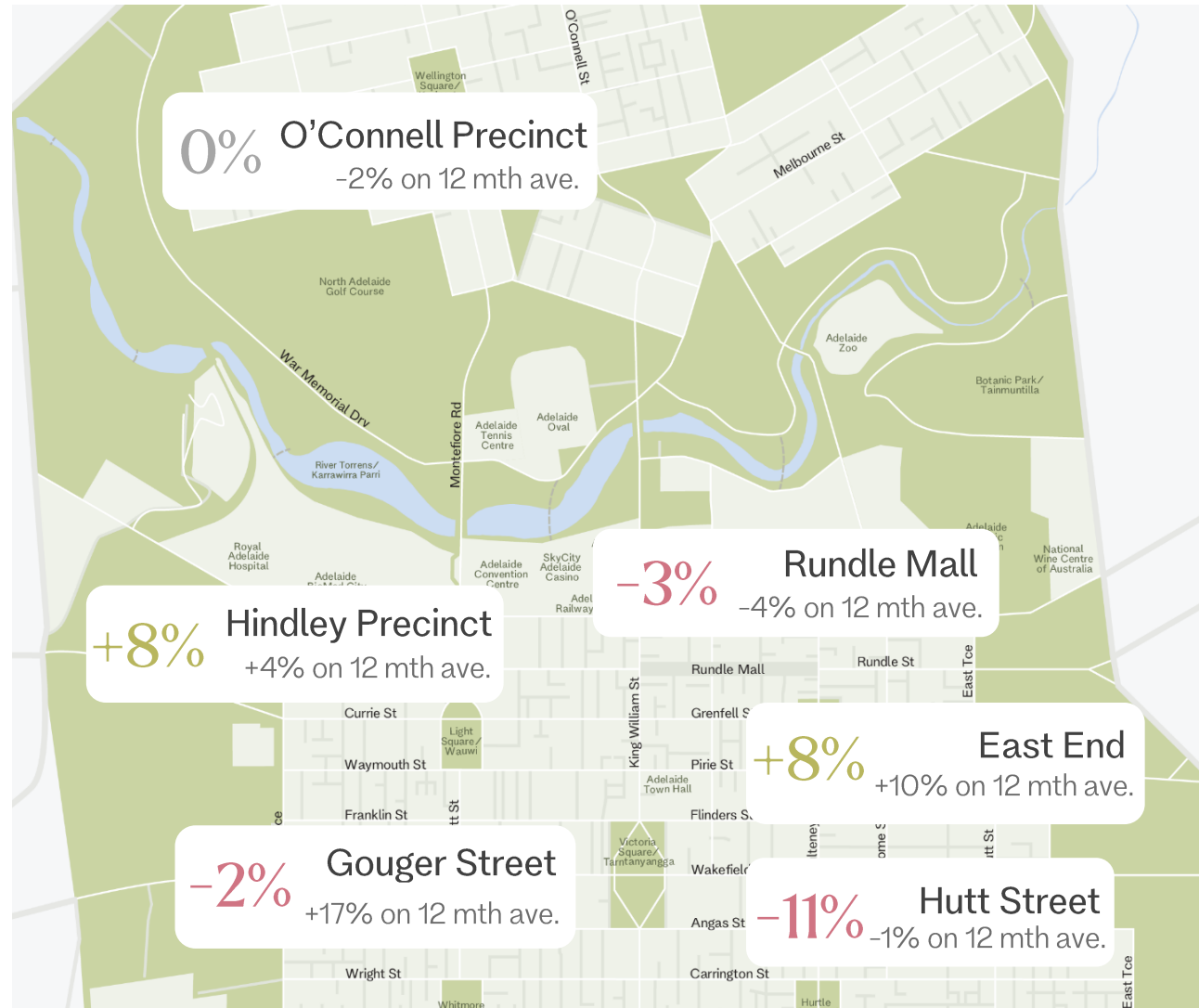
Foot Traffic - Visits





Total Visits by Precinct – Q1 2025

(Like-for-like change from Q1 2024)





Parking Transactions – City of Adelaide

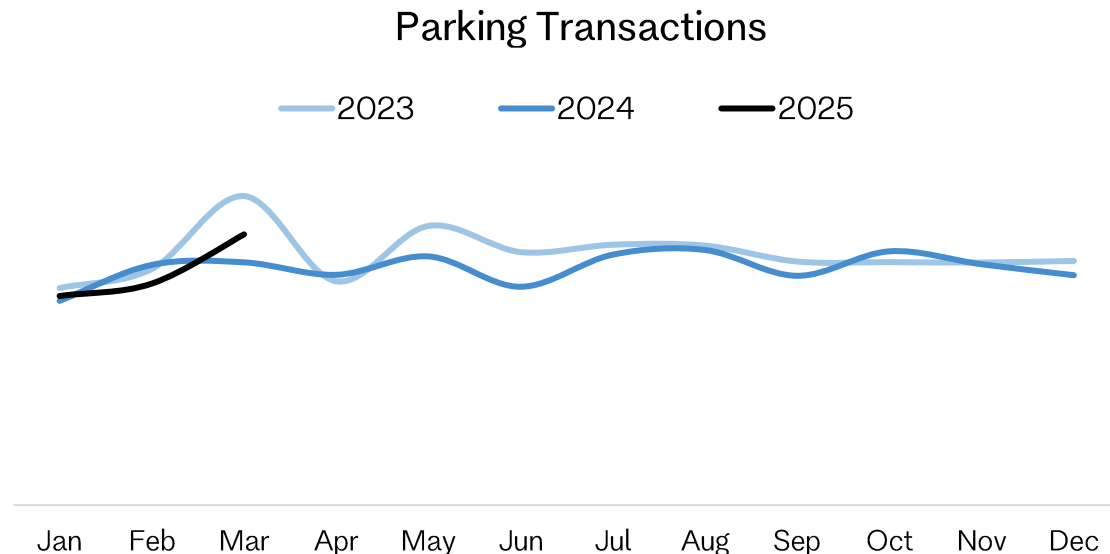
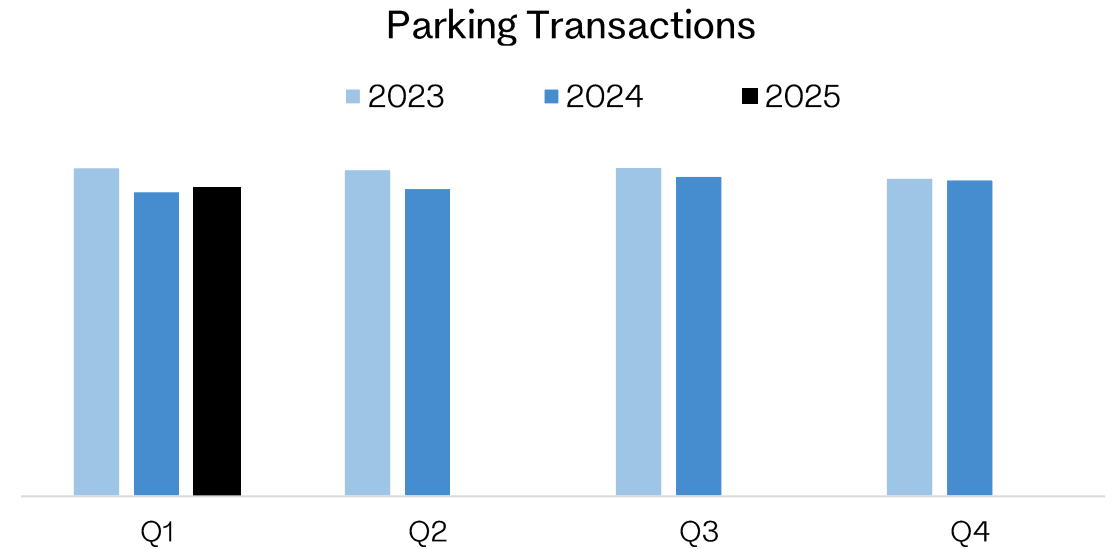
Adelaide Fringe fuels parking activity

Parking Transactions Q1

1.08M

0 pts on Q1 2024
-1 pts on Q4 2024

- Overall parking activity rose 4% above the 12-month average, with off-street transactions 2% higher and on-street volumes steady compared to Q1 2024.
- March was the strongest month, with parking transactions 13% higher annually (like-for-like), however, quarterly parking activity remains 6% below 2023 levels.
- During the festival season, parking transactions rose 7% year-on-year and were 18% above the 12-month average.





Public Transport Transactions – City of Adelaide

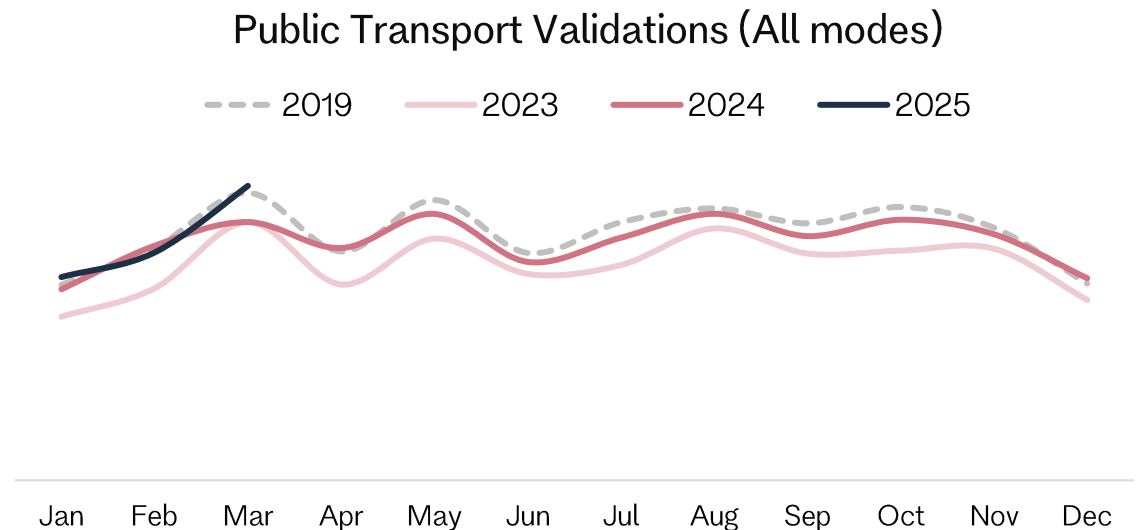
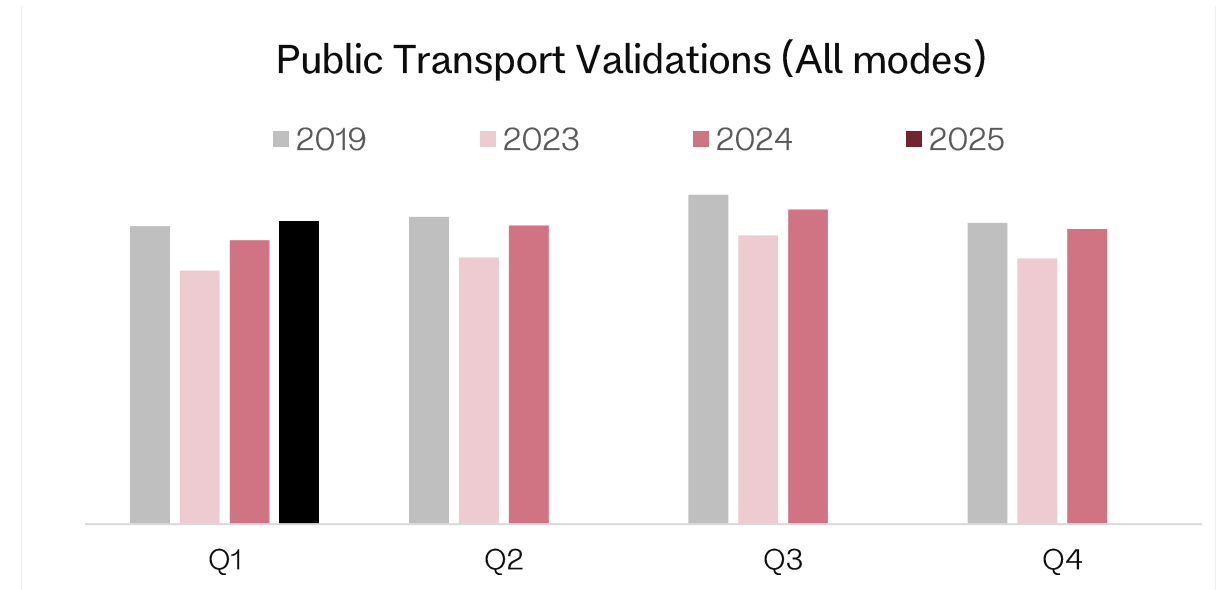
Weekend validations surge past 2019 levels

Public Transport Validations Q1

3.89M

+6% on Q1 2024
+2% on Q4 2024

- Public transport ticket validations are a combination of Adelaide Railway Station entries and bus tap-ons in the City of Adelaide.
- Weekend transport usage reached 118% of 2019 levels in 2024, this trend continued into Q1 2025, with weekend usage surpassing also surpassing pre-COVID levels (120% of 2019 levels).
- March saw record public transport activity in the city, with validations reaching 102% of March 2019 levels.
- Weekend validations were 11% higher compared to the same weekends last year, while weekday validations increased 4% above the 12-month average.





E scooter Trips– City of Adelaide

Weekend spikes amid annual decline

E scooter trip starts Q1

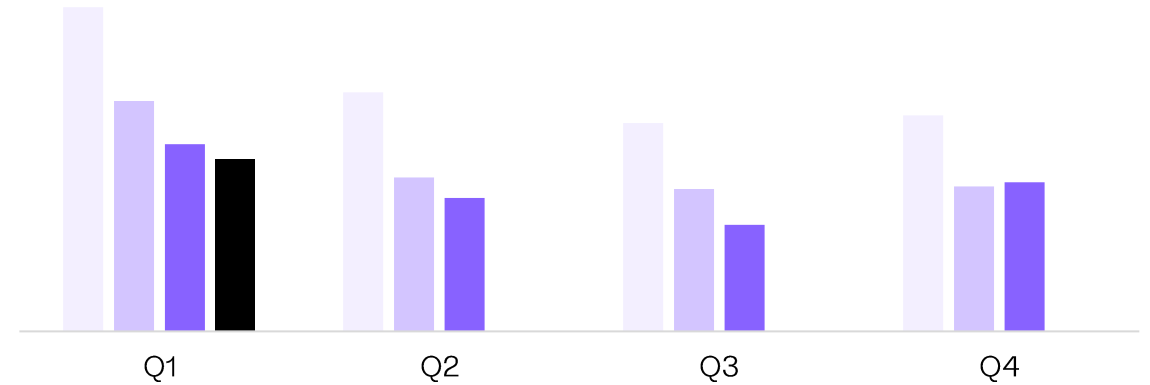
164k

-7% on Q1 2024
+16% on Q4 2024

- E-scooter usage rose 16% from Q4 2024, driven by strong weekend demand, although usage remained 7% below Q1 2024 levels.
- Weekend usage (Friday–Sunday) spiked 30% above the 12-month average, highlighting event-driven activity during the quarter.
- Despite quarterly growth, the broader trend remains subdued, with overall usage continuing a year-on-year decline.

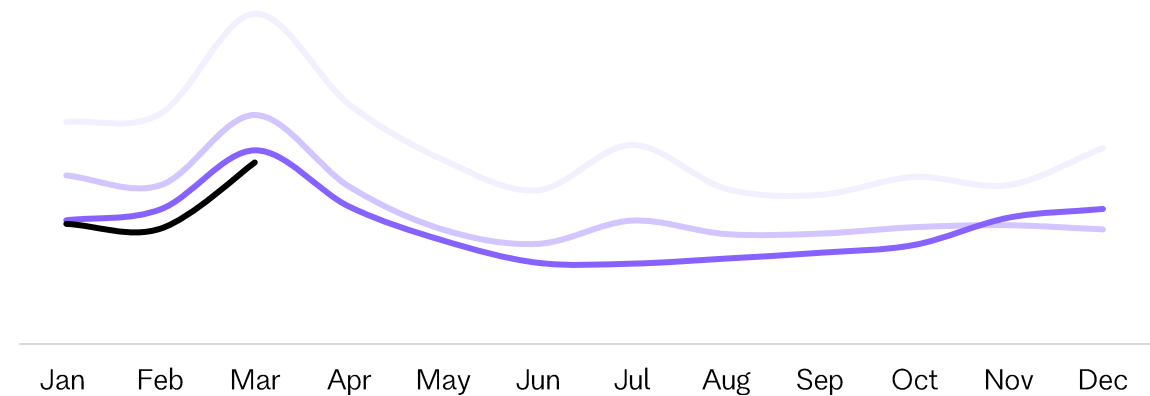
E-Transport Trips

2022 2023 2024 2025



E-Transport Trips

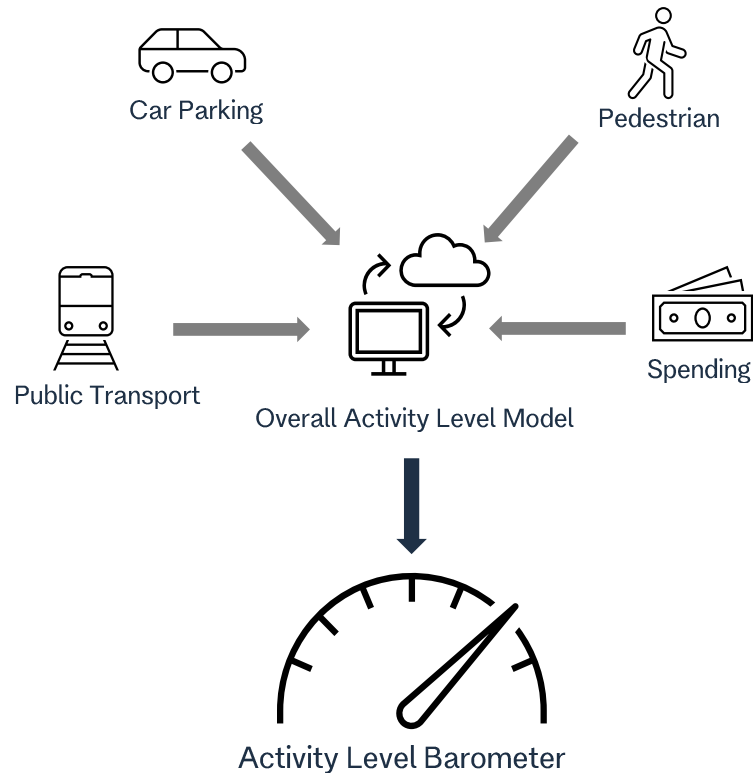
2022 2023 2024 2025





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.

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.

Acknowledgement of Country

The City of Adelaide acknowledges that we are located on the traditional Country of the Kaurna people of the Adelaide Plains and pays respect to Elders past, present and emerging.

We recognise and respect their cultural heritage, beliefs and relationship with the land. We also extend that respect to visitors of other Aboriginal Language Groups and other First Nations.

Thank you



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