

AEDA Insights

Activity Report

Q3 2025 (July - September)

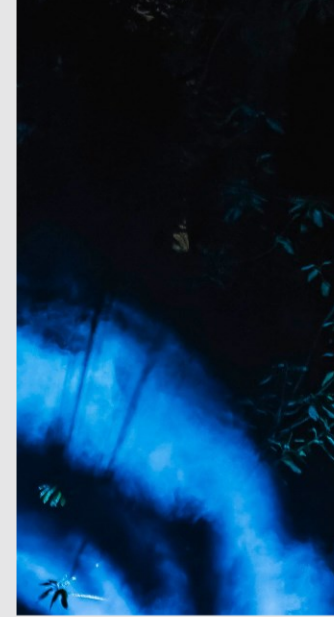


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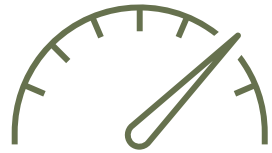
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Activity

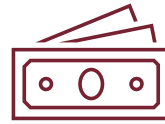
Q3 2025

Summary of Findings



Overall

- Activity levels in the City of Adelaide held steady, supported by winter events and sport.
- July and September were busier than August.
- Visitation and expenditure in real terms softened, whilst mobility metrics increased compared to Q3 2024.



Expenditure

- Nominal expenditure grew modestly, although when adjusted for inflation was stable. Apparel and healthcare outperformed other categories.
- Night-time spending remained stagnant, with less spending occurring in bars and clubs.



Resident Behaviour

- City of Adelaide resident expenditure grew marginally in nominal terms. Resident spending outside the City of Adelaide increased at a higher rate than internal expenditure.
- Resident online expenditure continues to grow.



Foot Traffic

- City wide foot traffic declined, however, visitation trends varied by precincts.
- Visitation increased during Illuminate Adelaide and the British & Irish Lions rugby tour, reflecting the importance of events.




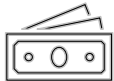


Mobility

- Public transport usage increased for both weekday and weekend trips.
- Parking transactions activity improved on last year.
- E transport usage remained subdued.



Activity Metrics – Q3 2025

(Like-for-like change from Q3 2024)

		Q3 2025	July	August	September
Total visits (All combined sensors)		-12%	-7%	-15%	-13%
Real expenditure (Inflation adjusted to Q3 2024)		-1%	+1%	-4%	+1%
Public transport (All modes validations)		+1%	+3%	0%	+1%
Parking (On + off street validations)		+5%	+6%	+5%	+5%

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

Overall activity supported by events

Activity Score Q3

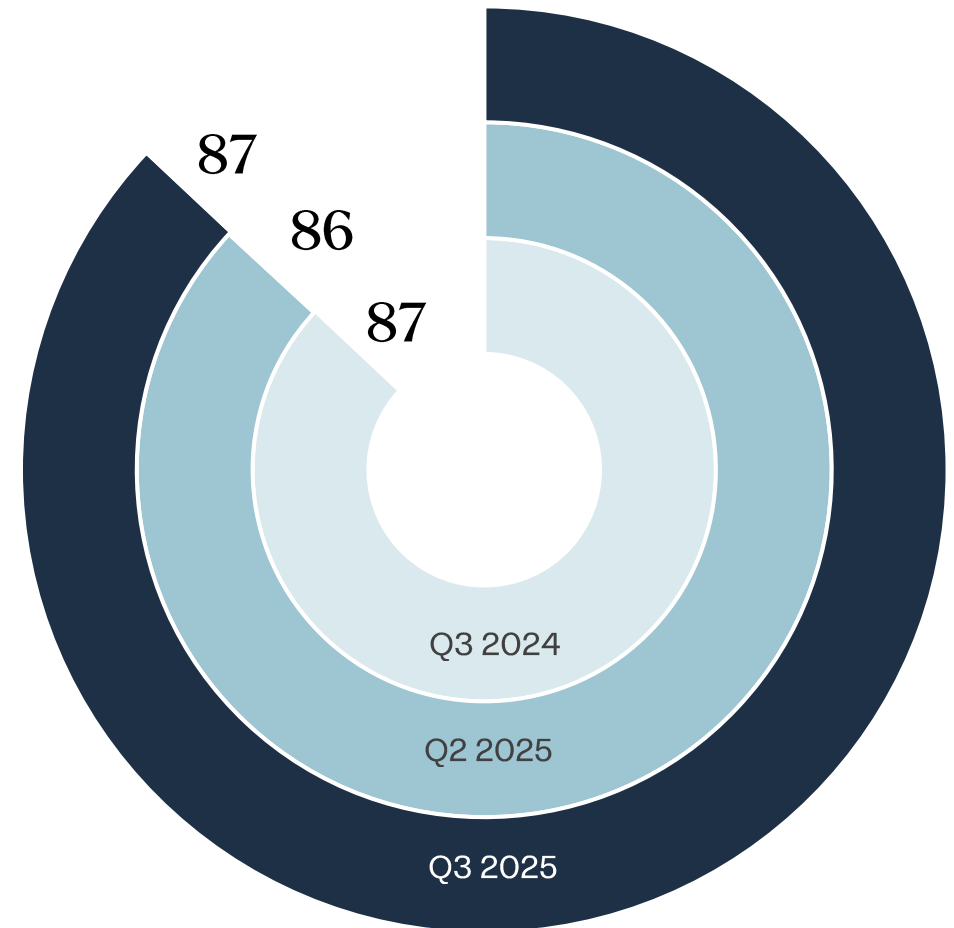
87

0 pts on Q3 2024

+1 pts on Q2 2025

- After statistically modelling key activity indicators, including unique visitors, inflation adjusted expenditure, public transport validations and parking transactions, overall activity levels remained comparable year-on-year and increased marginally by 1 point from the previous quarter (refer to appendix for methodology).
- A strong events calendar, featuring Illuminate Adelaide, SALA, ongoing AFL season (including AFL Finals), Adelaide Guitar Festival, and historically high business event activity, helped maintain elevated activity levels.

Modelled Activity Scores

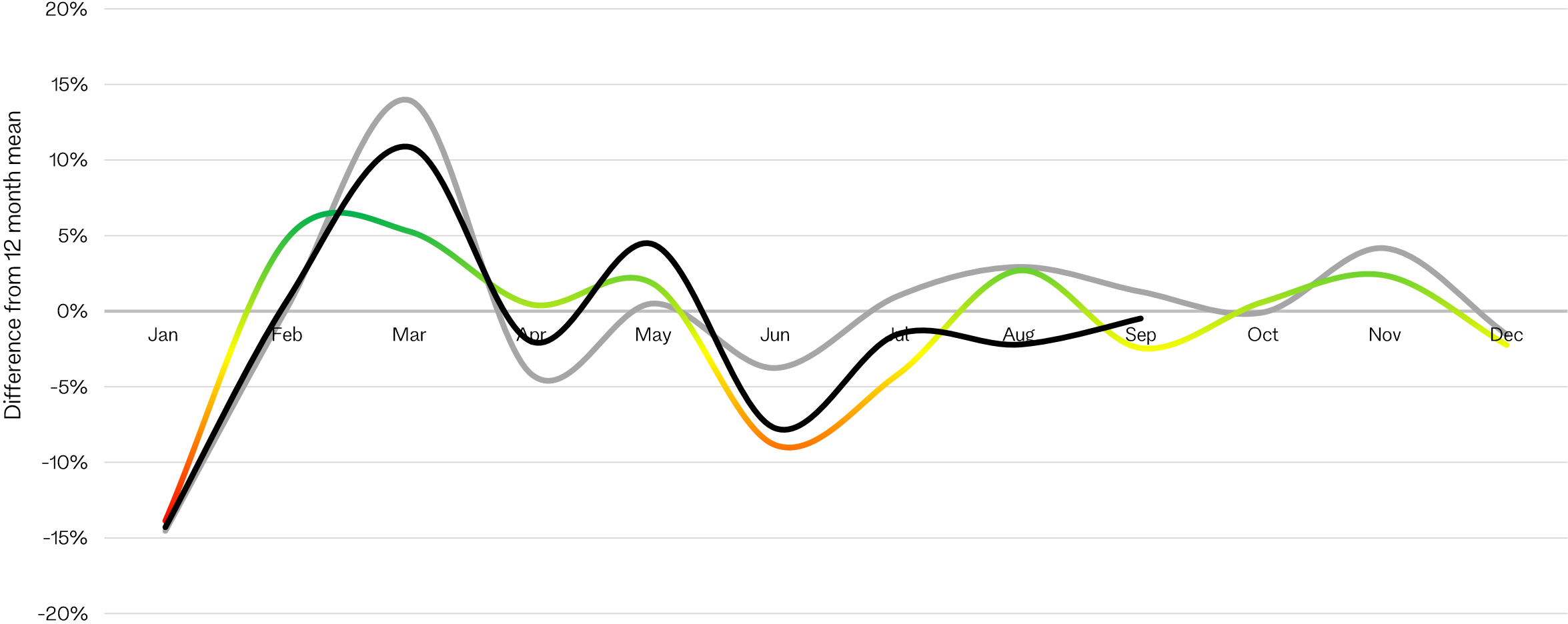


Monthly activity levels – City of Adelaide



Monthly score vs 12 month mean of modelled activity

— 2023 — 2024 — 2025

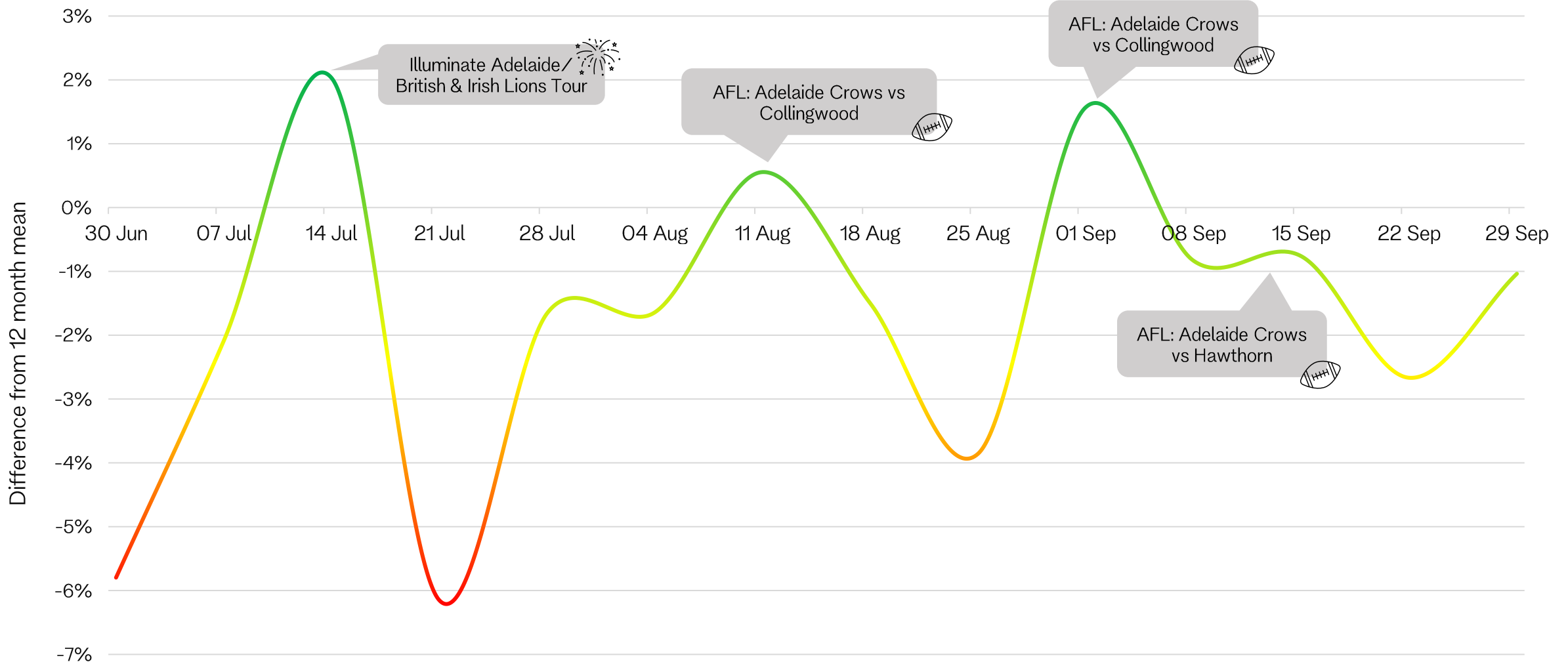


Source: AEDA Modelled Activity

Weekly activity levels – City of Adelaide



Weekly score vs 12 month mean of modelled activity



Expenditure – City of Adelaide

Spending continued momentum from Q2

Total Nominal Expenditure Q3

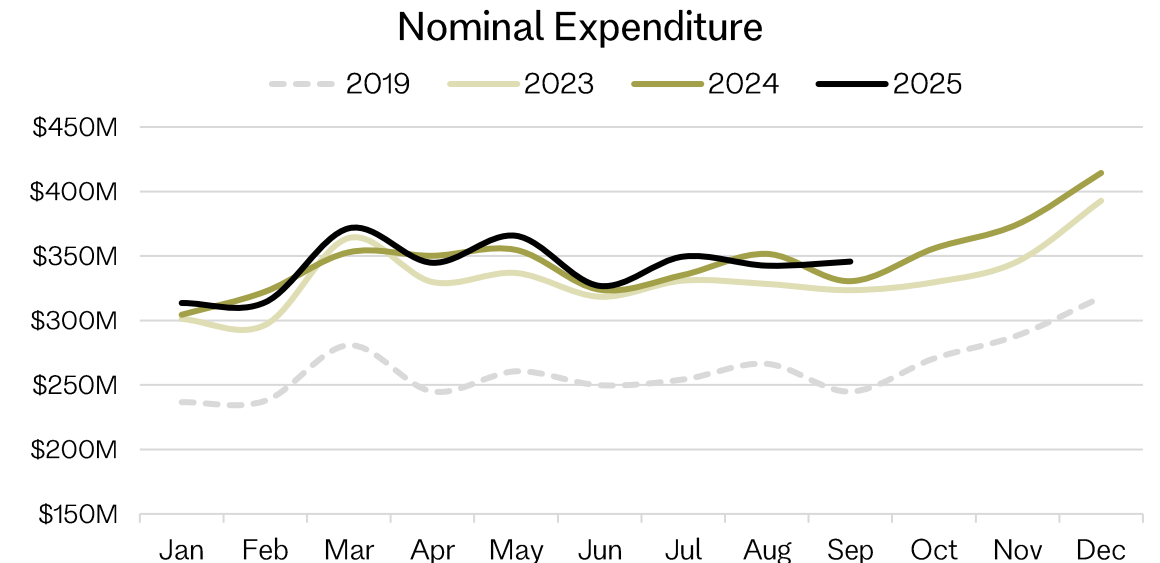
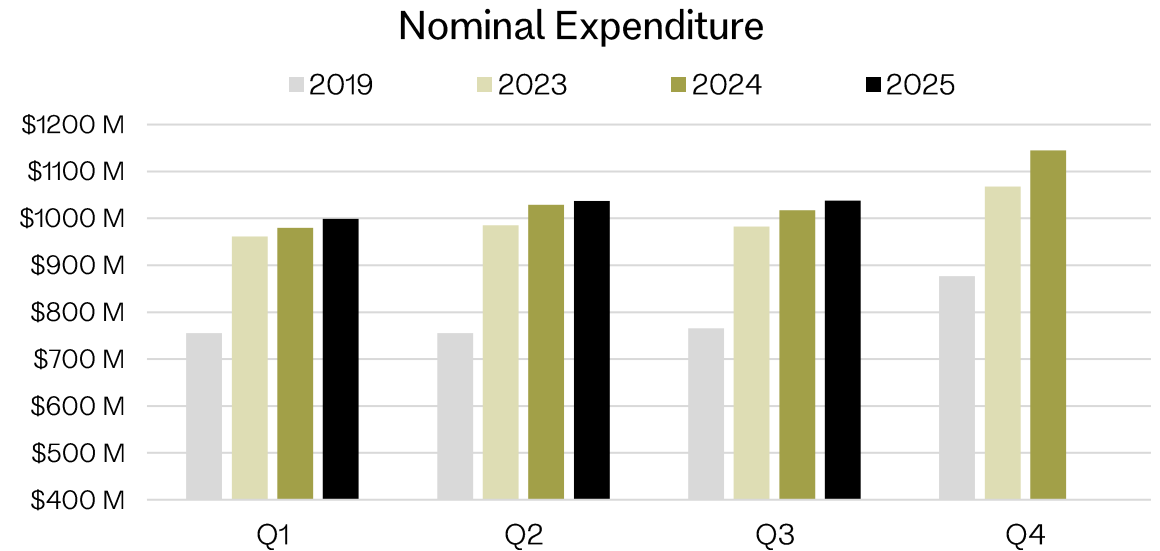
\$1.04B

+2% on Q3 2024

0% on Q2 2025

- Total expenditure across Q3 2025 was modestly higher year-on-year in both nominal and like-for-like, as annual growth in July and September offset a softer August.
- Discretionary spending remained the dominant driver of spending activity (62% of total spend) and recorded year-on-year growth across the quarter, whilst consumer staples and other essential categories were comparatively subdued.
- Growth was led by services and retail subcategories, with strong momentum in apparel and healthcare spending, alongside steady increases in dining, entertainment and specialised food retailing. In contrast, bars and clubs as well as department stores fell.
- Work-hour activity continued its upward trajectory both quarterly and year-on-year, reflecting constant momentum in daytime spending. Resident expenditure within the city and to external suburbs increased over the quarter.

Source: Spendmapp by Geografia





Expenditure in real terms – City of Adelaide

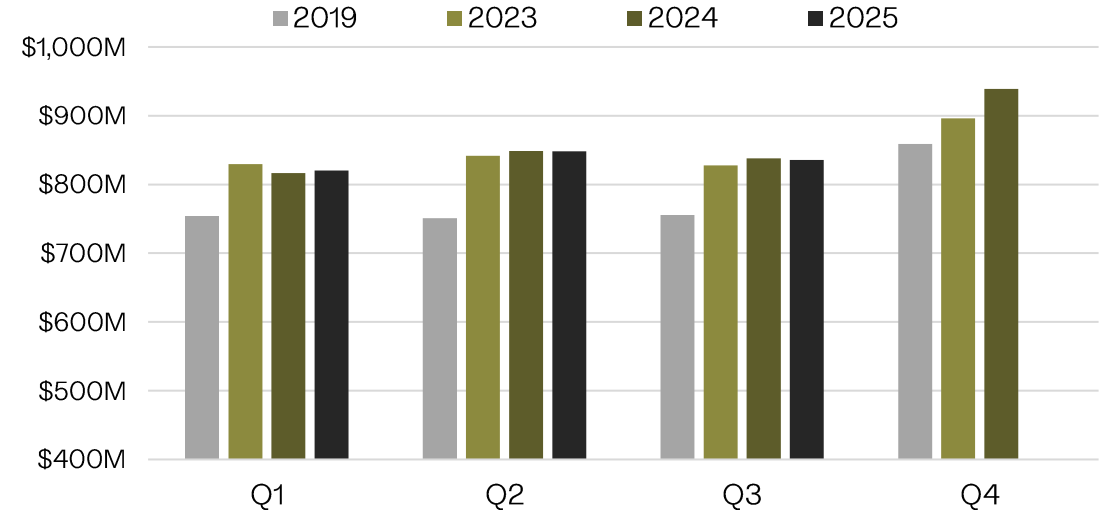
Real expenditure softened

Real Expenditure Q3
(Inflation adjusted to Q3 2024)

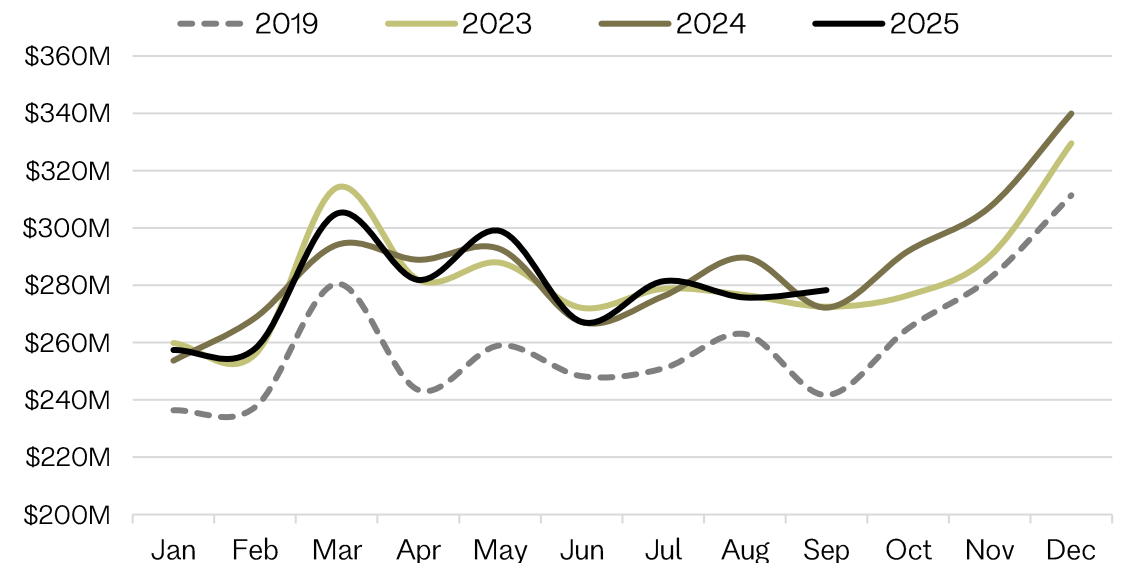
-1% on Q3 2024
-1% on Q2 2025

- After accounting for inflation, expenditure in real terms has remained stable.
- Q3 2025 expenditure was lower than Q3 2024. July and September had real growth, most notably on the weekends, aligning with key events. August was the weakest month for the quarter and September showed improvement on weekdays.
- Most categories declined this quarter in real terms when compared to Q3 2024, except for discretionary and retail spending, which remained unchanged from last year.
- When adjusting night-time categories for inflation, all categories declined compared to Q3 2024, except entertainment (which includes theatres, casinos, arcades, and recreation services).

Real expenditure - Inflation adjusted to 2019







Real expenditure - Inflation adjusted to 2019





Expenditure summary – City of Adelaide (CoA)

(Like-for-like change from Q3 2024)

	Q3 2025	July	August	September
Night-Time (6pm – 6am) 	+1%	+6%	-2%	-1%
Work Hour (8am – 6pm, Mon-Fri) 	+2%	+2%	0%	+6%
CoA Resident (internal inside CoA boundary) 	+2%	-1%	-1%	+7%
CoA Resident (to other suburbs outside CoA) 	+6%	+7%	+7%	+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



Night-time expenditure – City of Adelaide

Night-time spending remained stagnant

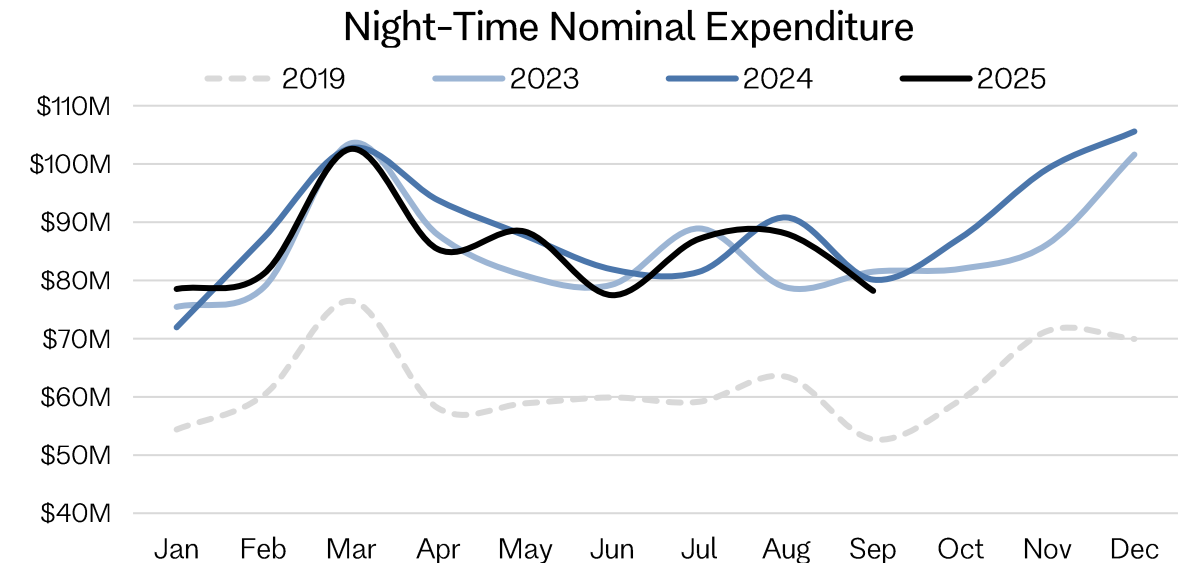
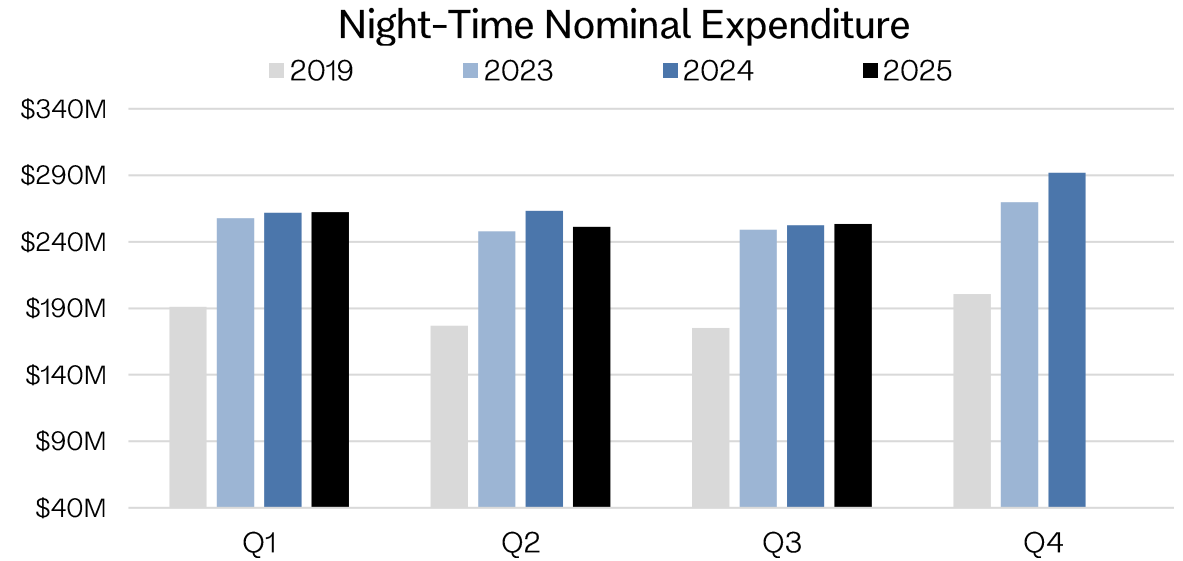
Total Nominal Expenditure Q3

\$253M

0% on Q3 2024

1% on Q2 2025

- Night-time expenditure was flat compared to Q3 2024 and declined slightly in real terms. Night-time spending peaked in July, supported by major events and school holidays.
- Expenditure at bars and clubs recorded the largest decline (-13% year-on-year), whilst other categories held positive, led by entertainment (+50%).
- During the Illuminate Adelaide 2025 period, night-time spending reached \$59 million (+6% vs 2024), including a 7% uplift across weekends compared to the event last year.
- Major sporting events also boosted activity, as the British & Irish Lions tour weekend lifted night-time spend by 8% (\$7.4 million on game night, +38% higher than the average Saturday).
- Night-time spending during the Adelaide Crows vs Collingwood qualifying finals game reached \$4.9 million (+89% higher than the average Thursday).
- Weekday night-time spending (Monday to Thursday) was stable compared to last year. Weekend night-time expenditure increased by 1% on Q3 2024 (contrary to a decline in the previous quarter), with July weekends 8% higher year-on-year.

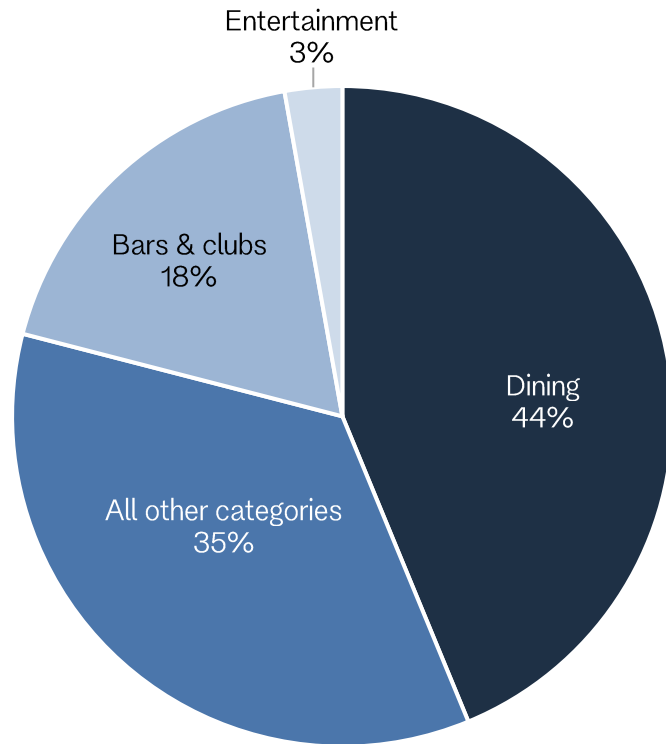




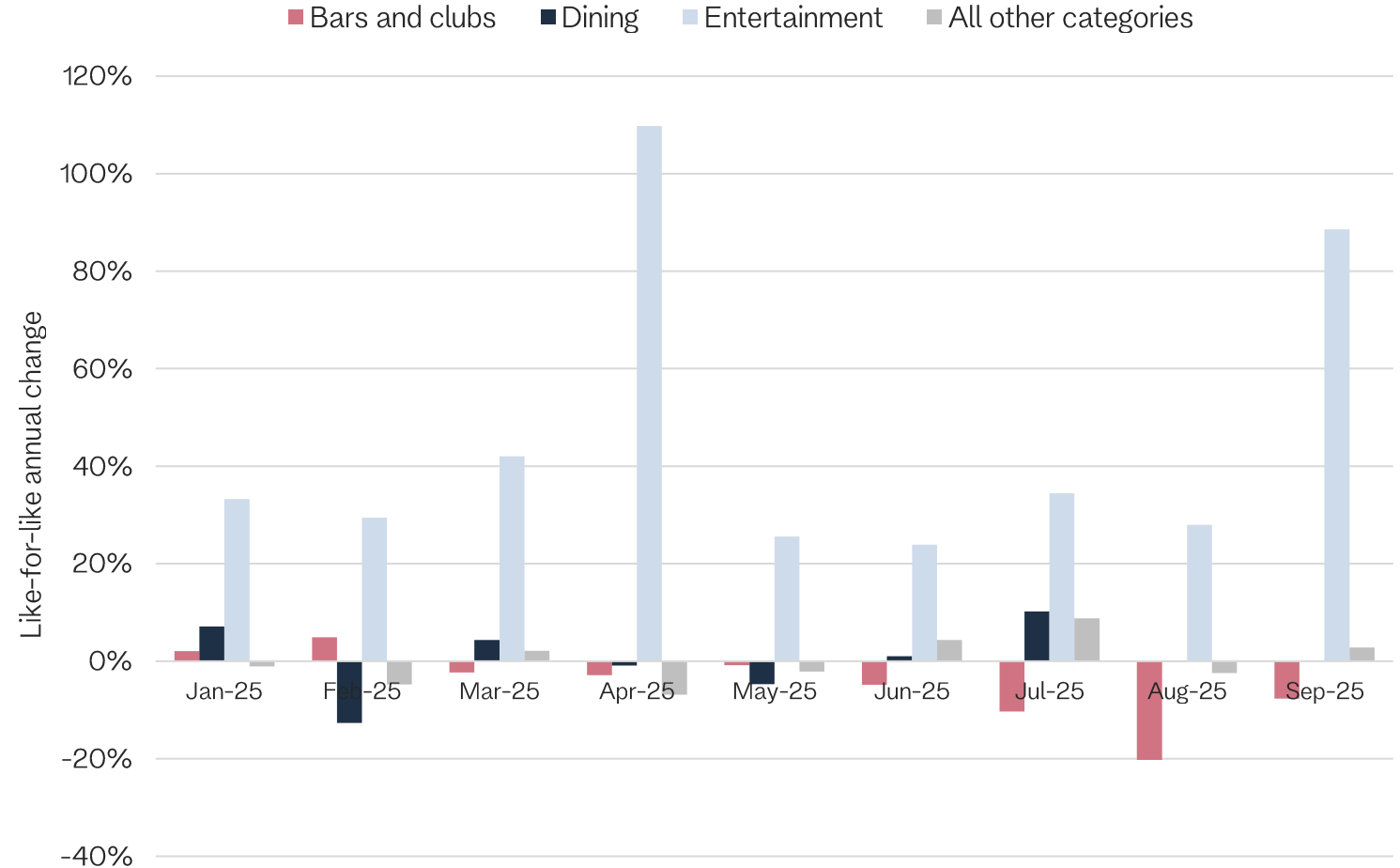
Night-time expenditure – City of Adelaide

(Like-for-like annual change)

Proportion of categories



Monthly year-on-year comparison



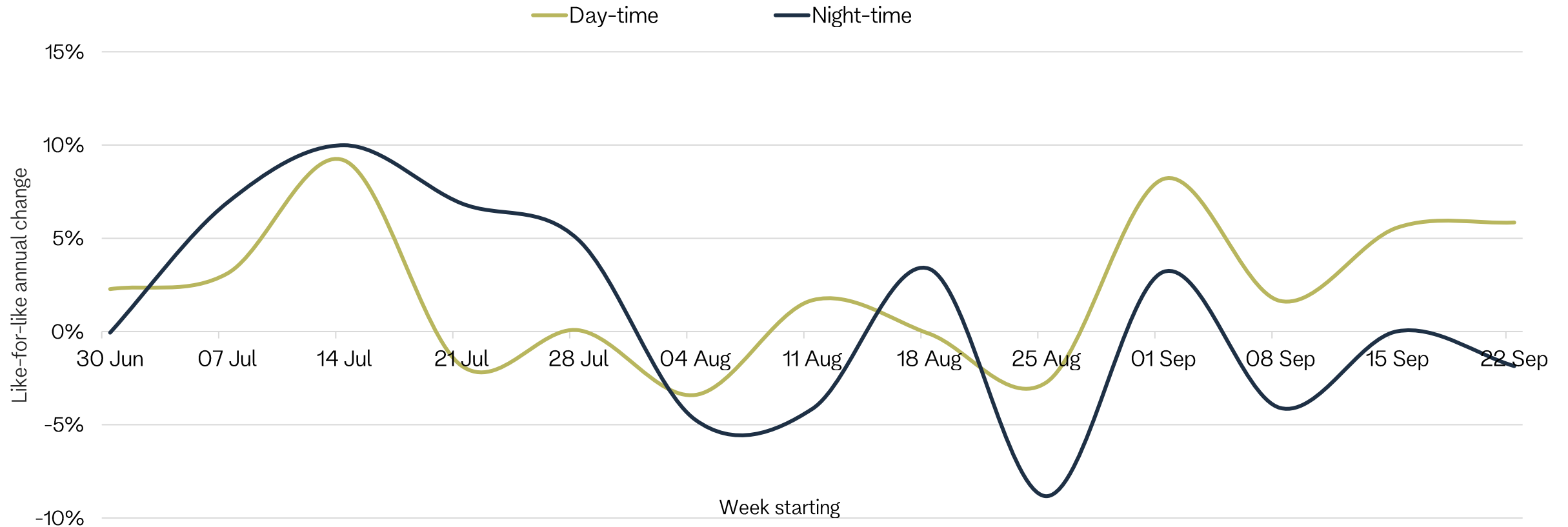
Source: Spendmapp by Geografia, like-for-like analysis compares the same days over the period with the same days of the corresponding period last year



Night-time vs day-time weekly expenditure – City of Adelaide

(Like-for-like annual change)

Night-time spending remained strong during July, then tapered off towards the end of the quarter, whilst day-time expenditure showed a similar pattern to night-time, especially in September.



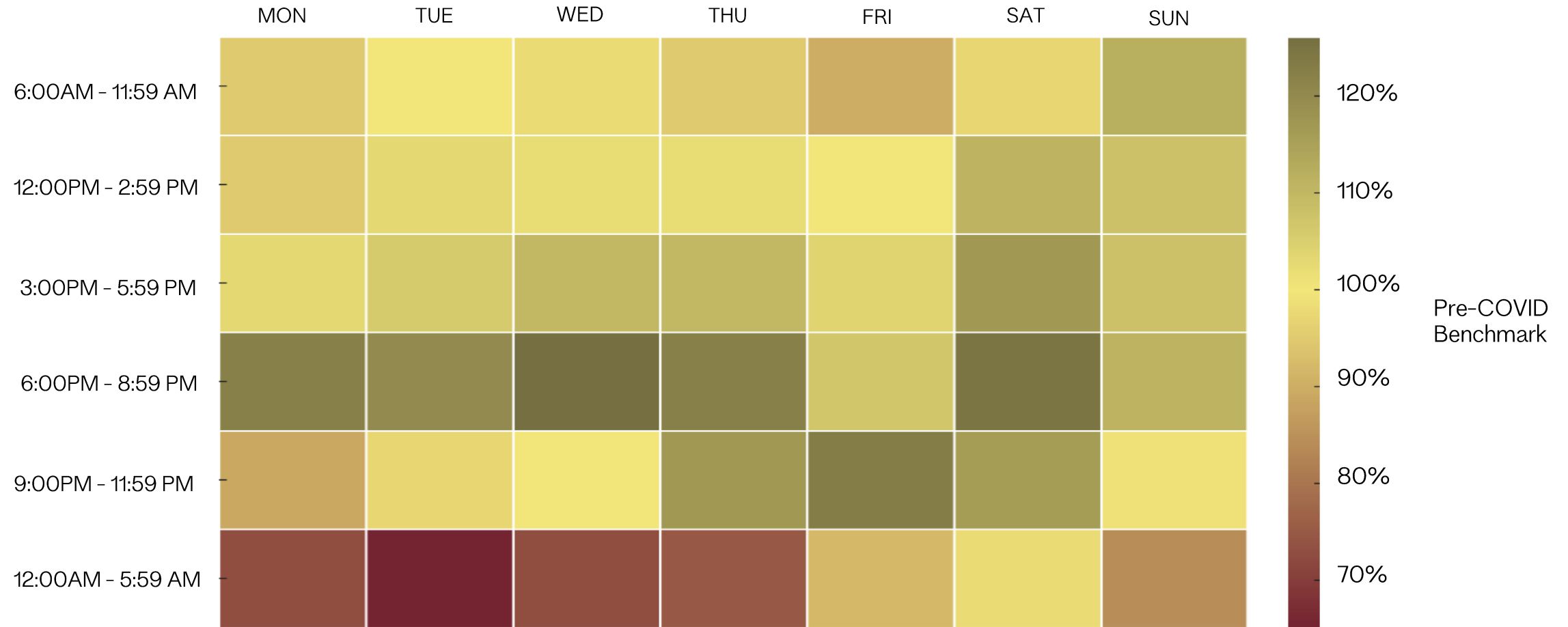
Source: Spendmapp by Geografia, like-for-like analysis compares the same days over the period with the same days of the corresponding period last year



Visitor expenditure by hour – City of Adelaide

(Inflation Adjusted, Benchmarked to 2019 Levels, YTD 2025)

Weekend day-time and midweek evening expenditure activity has performed above pre-COVID levels whilst Friday mornings and overnight/early morning activity has underperformed.



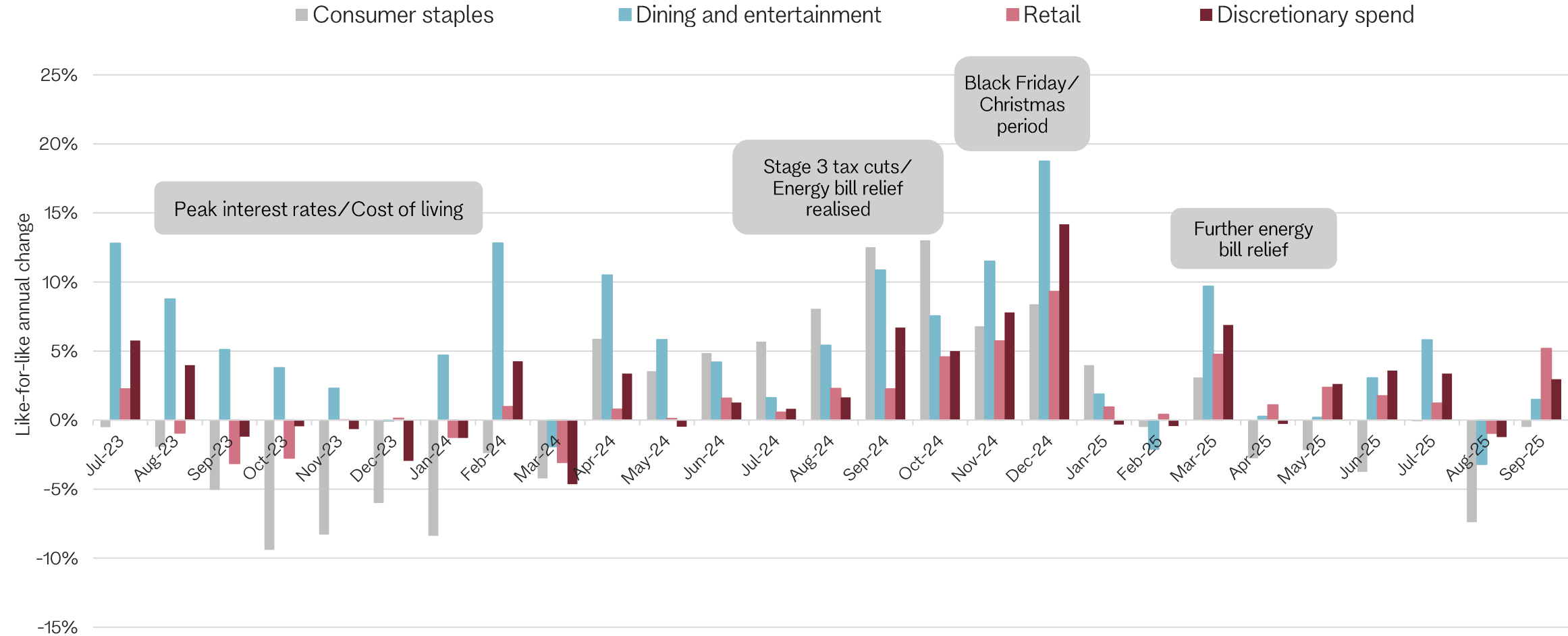
Source: Spendmapp by Geografia



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

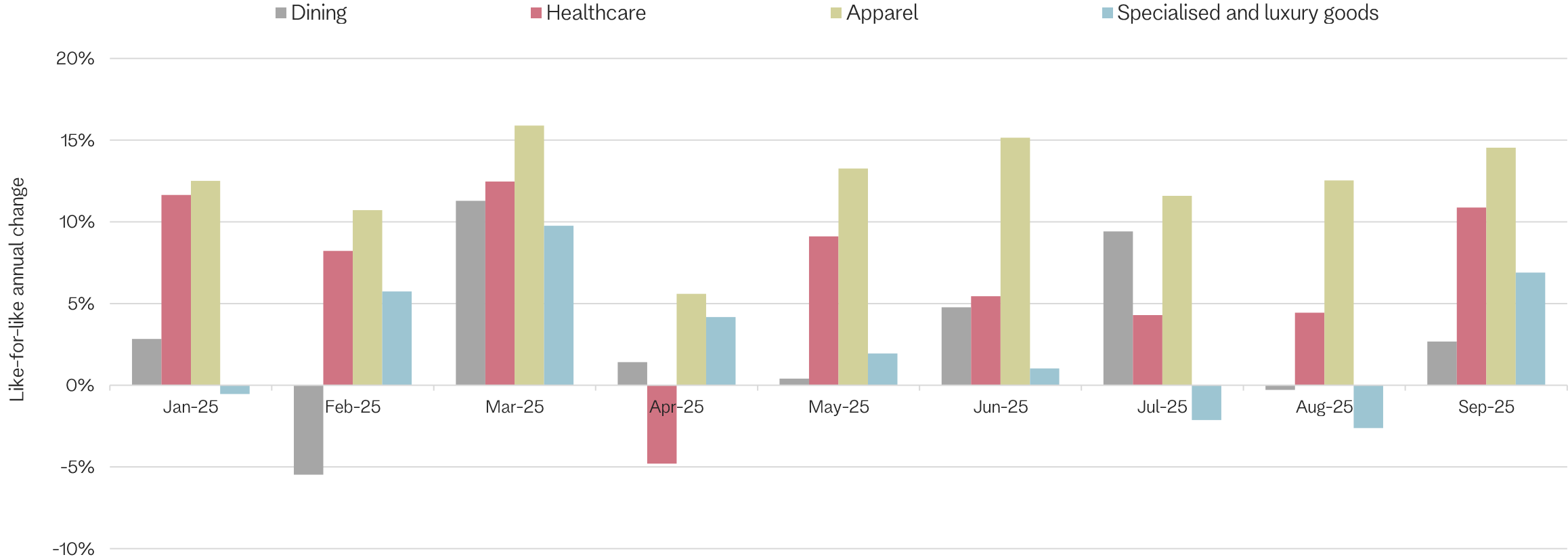


Expenditure by major subcategories – City of Adelaide

(Like-for-like annual change)

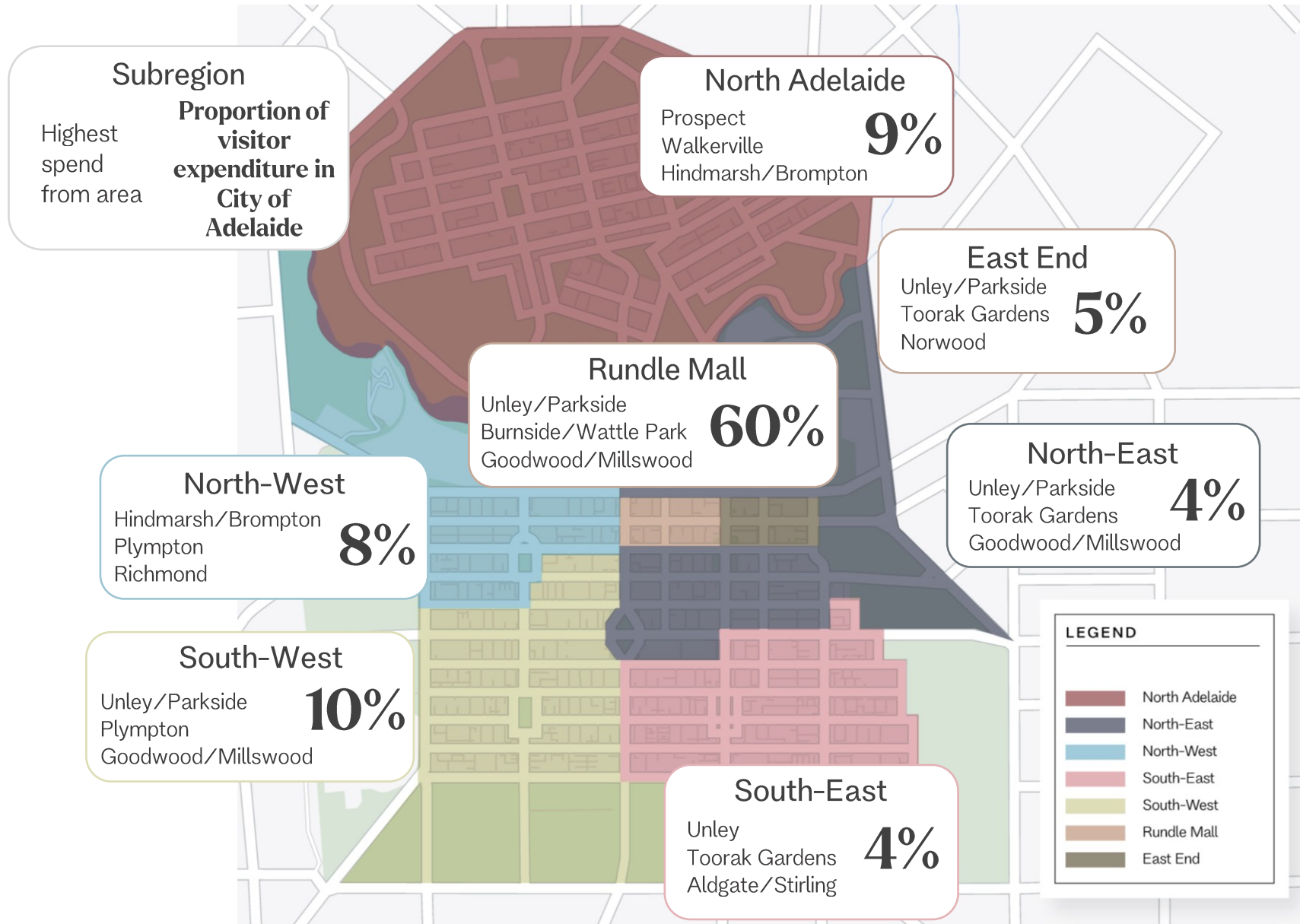
Apparel and healthcare have led expenditure growth throughout 2025 whilst dining and luxury goods have fluctuated.

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 subregion – Q3 2025



Source: Banking data



Resident expenditure leakage – Q3 2025



To Greater Adelaide

\$45M

+6% on Q3 2024

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



Online platforms

\$40M

+3% on Q3 2024

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



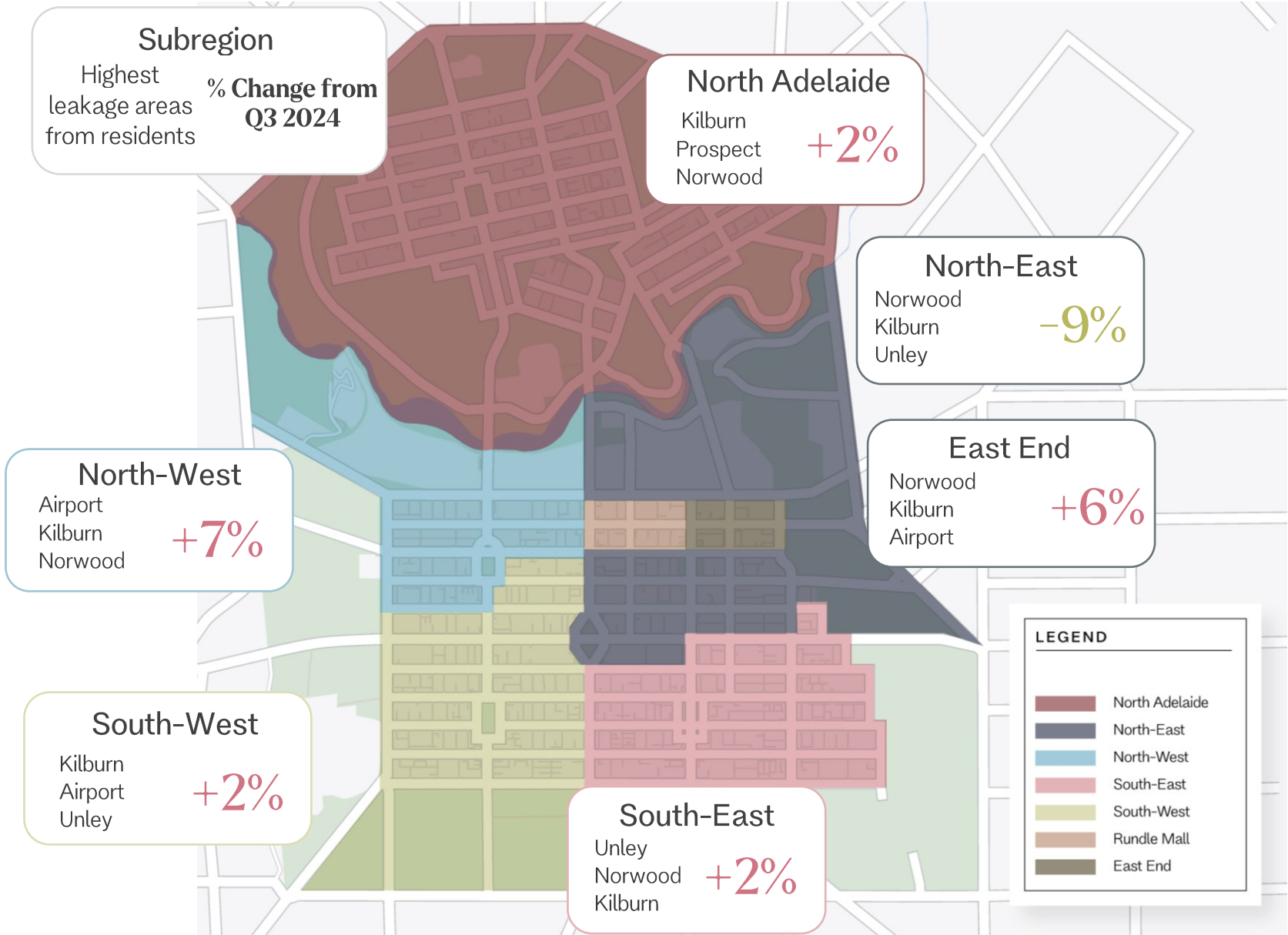
Other States

\$8M

-3% on Q3 2024

44% of resident expenditure to other states went to NSW

Resident external expenditure by subregion – Q3 2025



Source: Banking data



Foot traffic – City of Adelaide

Visitation remained subdued

Total Visitation Q3

30.3M

-12% on Q3 2024

-4% on Q2 2025

Unique visitors Q3

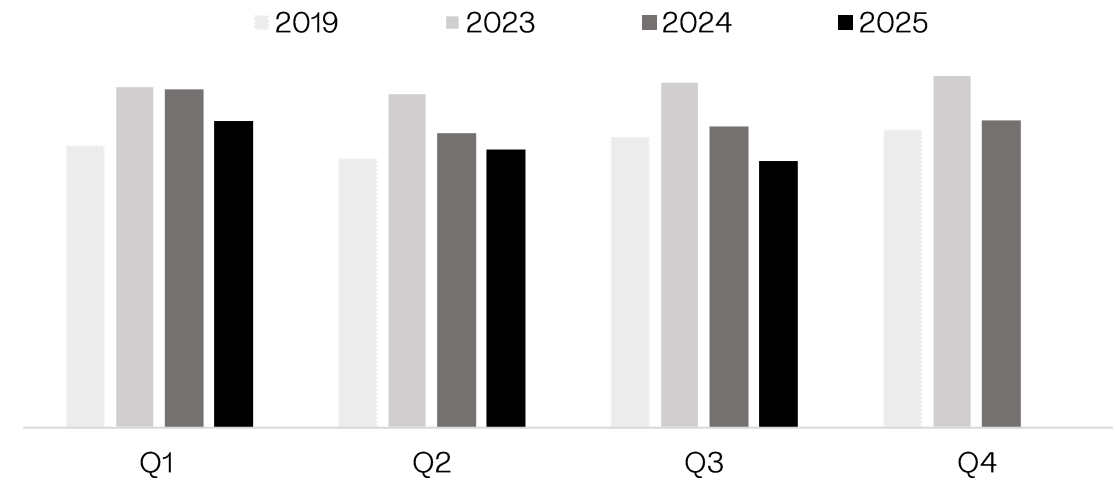
29.1M

-9% on Q3 2024

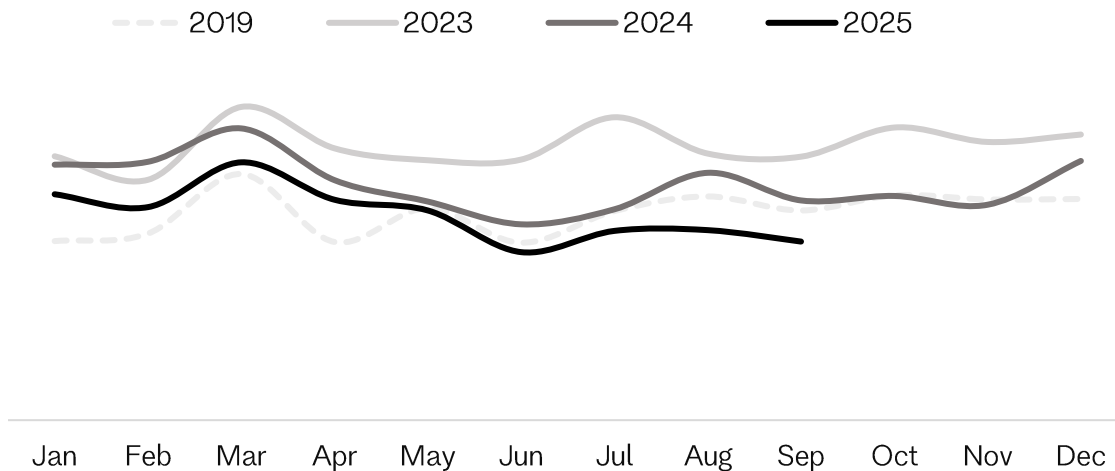
-7% on Q2 2025

- Citywide foot traffic continued to trend below 2024 levels, however, major events such as Illuminate Adelaide 2025 provided a notable uplift, with visitation during the event period 6% higher than last year.
- Event-driven activity remained a key driver of visitation, with night-time foot traffic during Illuminate Adelaide weekends lifting the East End visitation 16% above last year’s event period.
- The British and Irish Lions match also delivered a significant boost, with citywide visitation 24% higher than the same Saturday in the last year, highlighting the strong impact of major sporting events.
- Precinct-level performance was mixed. Hutt Street (+4%), Rundle Mall (+1%), and Hindley Street (+5%) all recorded higher activity compared to Q3 2024. Notably, the Hindley Precinct achieved a 21% annual increase in August 2025, likely supported by multiple music events.

Foot Traffic - Visits



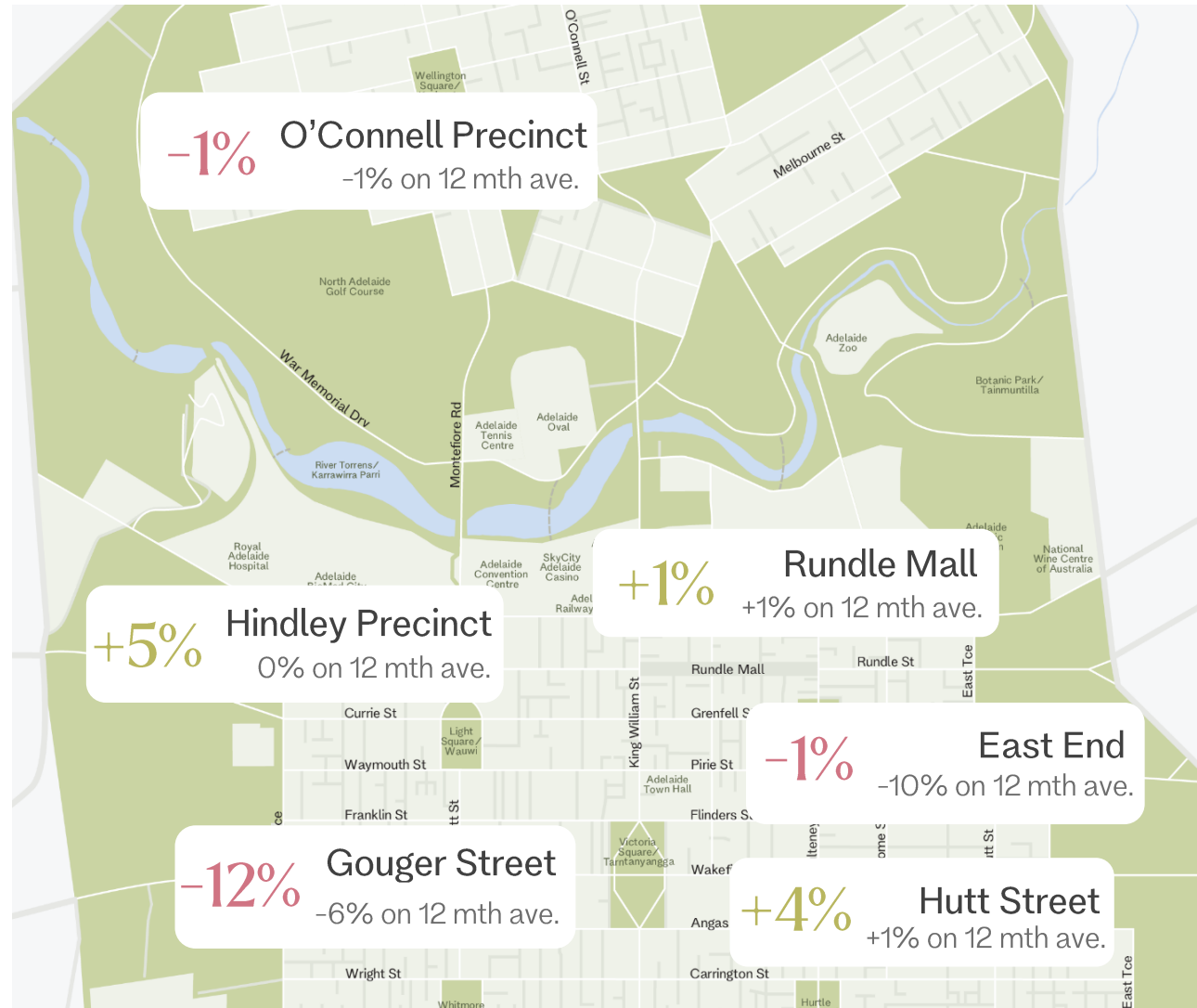
Foot Traffic - Visits





Total visits by precinct – Q3 2025

(Like-for-like change from Q3 2024)



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 improved on last year

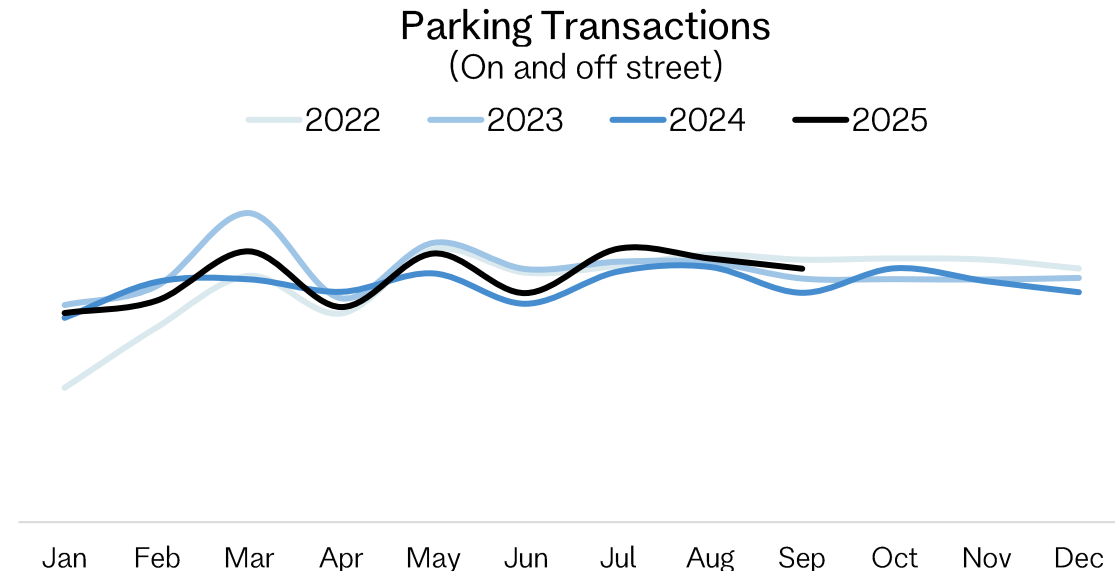
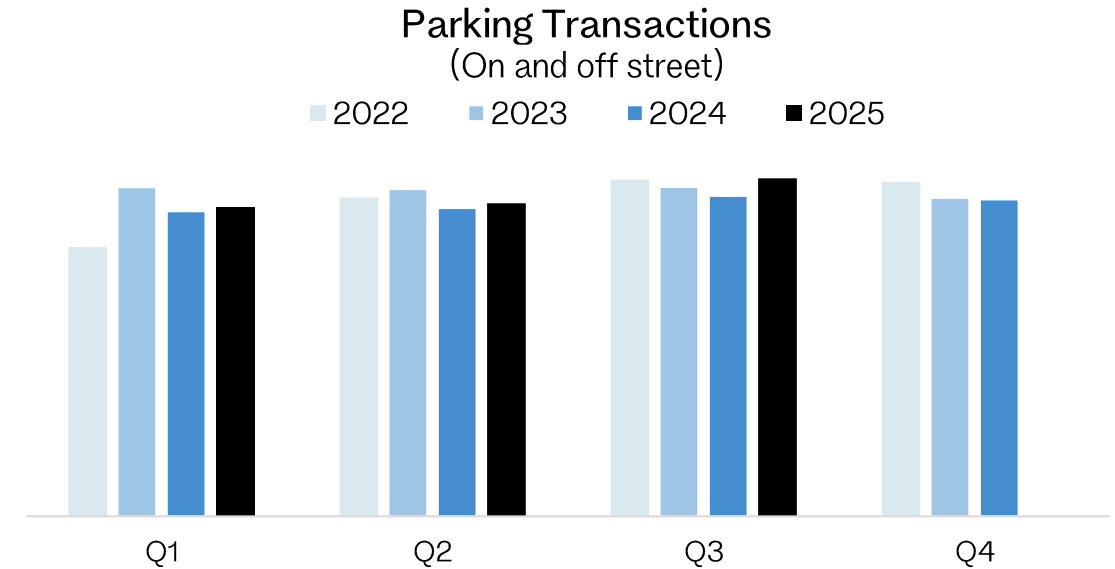
Parking transactions Q3

1.18M

+6% on Q3 2024

+8% on Q2 2025

- Overall parking (on and off street) parking transactions surpassed the highs of 2022. Q3 2025 was 6% higher than Q3 2024, recording the third consecutive quarter of year-on-year growth.
- Both weekend and weekday parking grew during the quarter, weekends increased 6% year-on-year, whilst weekday transaction activity (Monday to Thursday) increased by 5%.
- September recorded the strongest parking transaction activity, 8% higher year-on-year, likely driven by events and sporting matches.





Public transport transactions – City of Adelaide

Public transport plateaued during the quarter

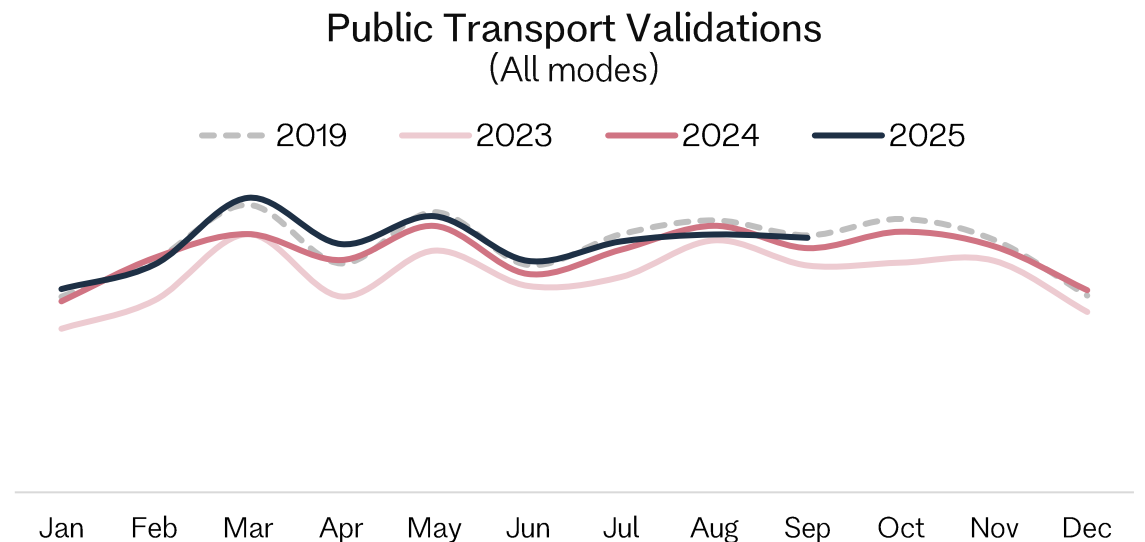
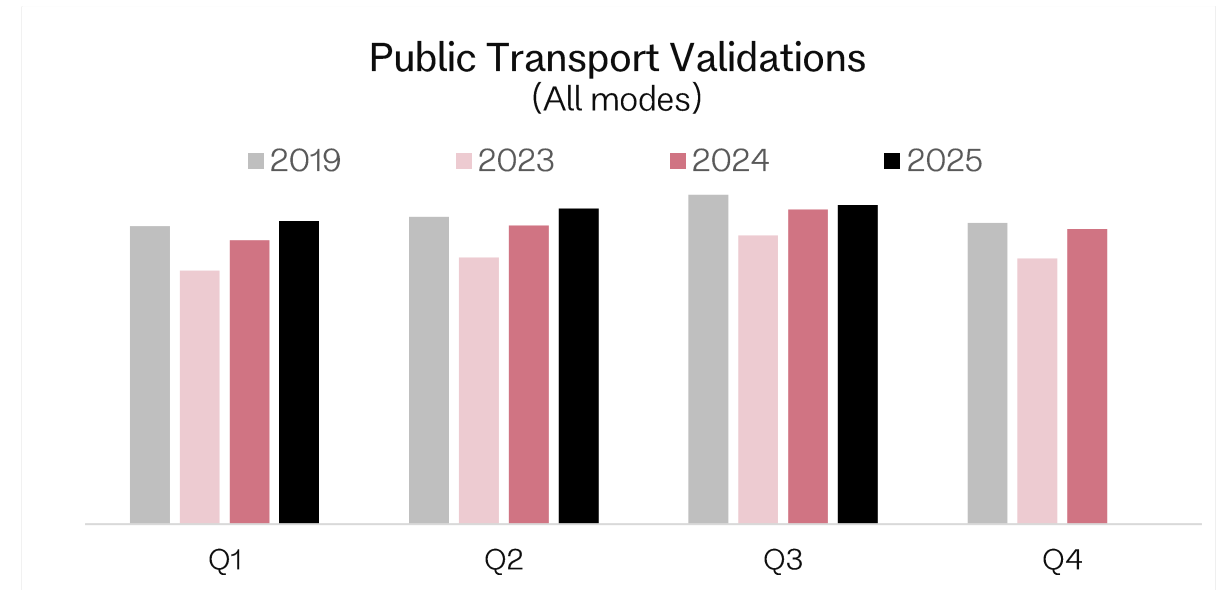
Public Transport Validations Q3

4.09M

+1% on Q3 2024

+1% on Q2 2025

- Public transport ticket validations are a combination of Adelaide Railway Station entries, as well as bus and tram tap-ons in the City of Adelaide.
- Public transport usage tapered off after growing during the past two quarters, with Q3 2025 validations sitting at 97% of 2019 levels.
- Ticket validations were 7% above the 12-month average, driven by a 5% rise in weekday usage and a 6% increase in weekend validations compared to Q3 2024.
- Strong weekend results and rising weekday usage reflected an ongoing recovery and increasing dependence on public transport for both work and leisure trips.



E-Transport trips – City of Adelaide

E-Transport usage continues to decline

E-Transport trip starts Q3

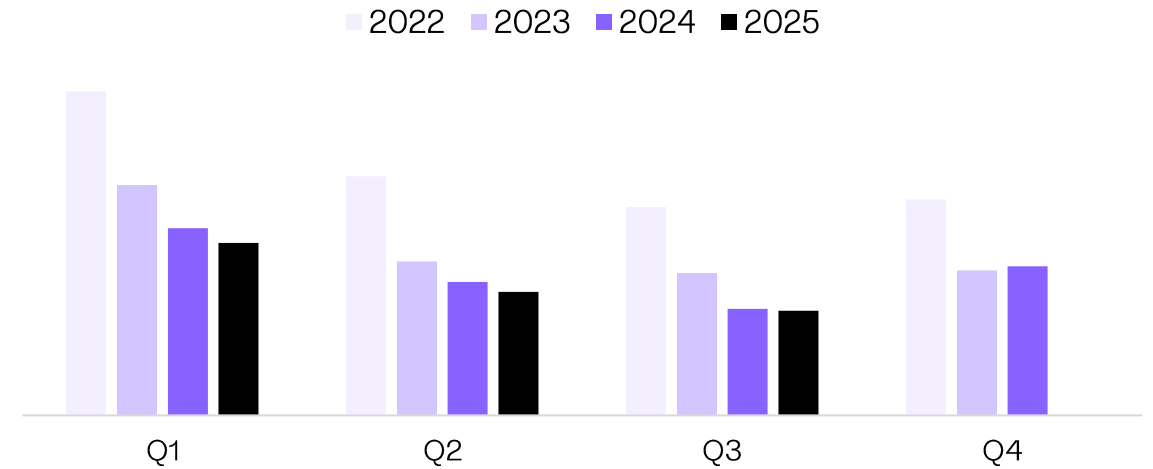
117k

-2% on Q3 2024
-15% on Q2 2025

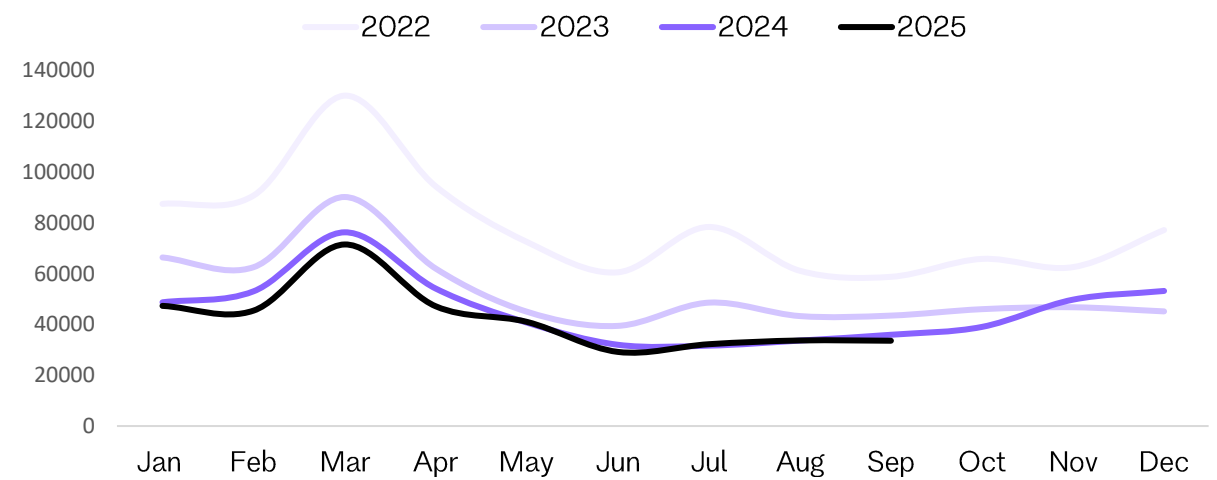
- E-scooter usage continued its broader subdued trend, with overall usage declining on the previous quarter and declining moderately on the same quarter last year.
- Both weekday and weekend usage declined on the same period last year and the 12-month average usage.



E-Transport Trips



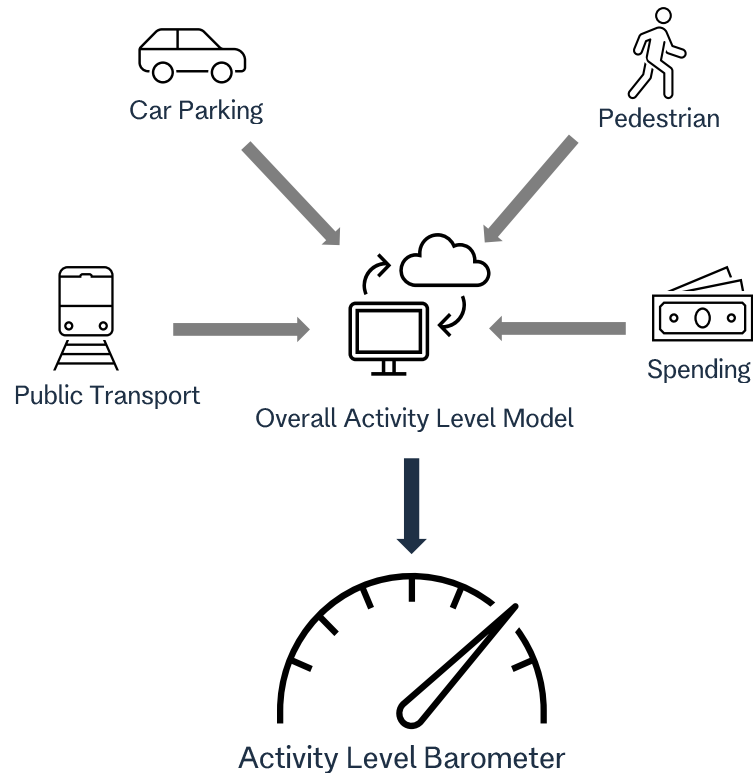
E-Transport Trips





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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