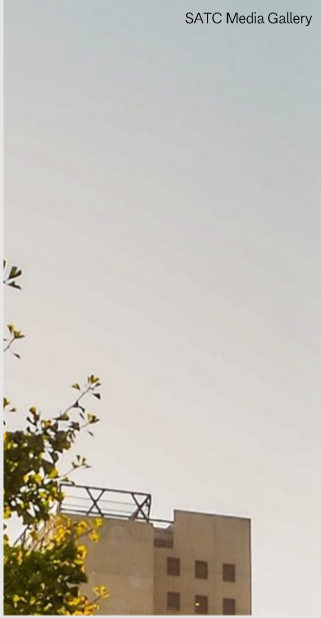
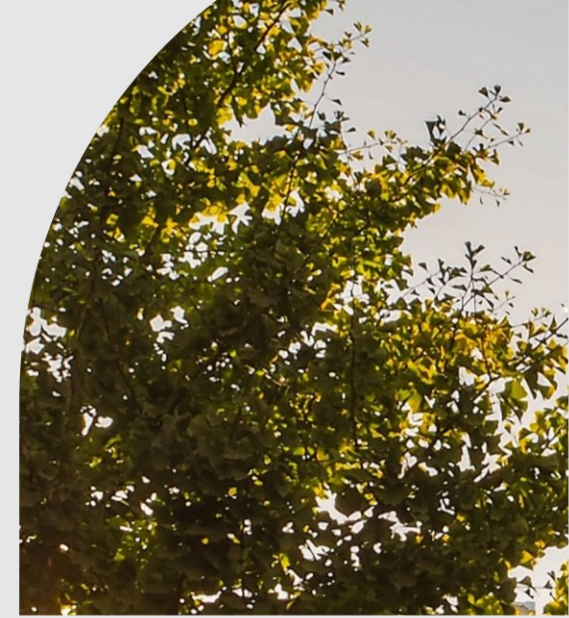
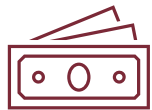


AEDA Insights

Economic Update

*"What's hot and what's not
– how Adelaide stacks up"*





Cost of living &
doing business

Inflation
normalising



Property prices
& interest rates

Wage growth



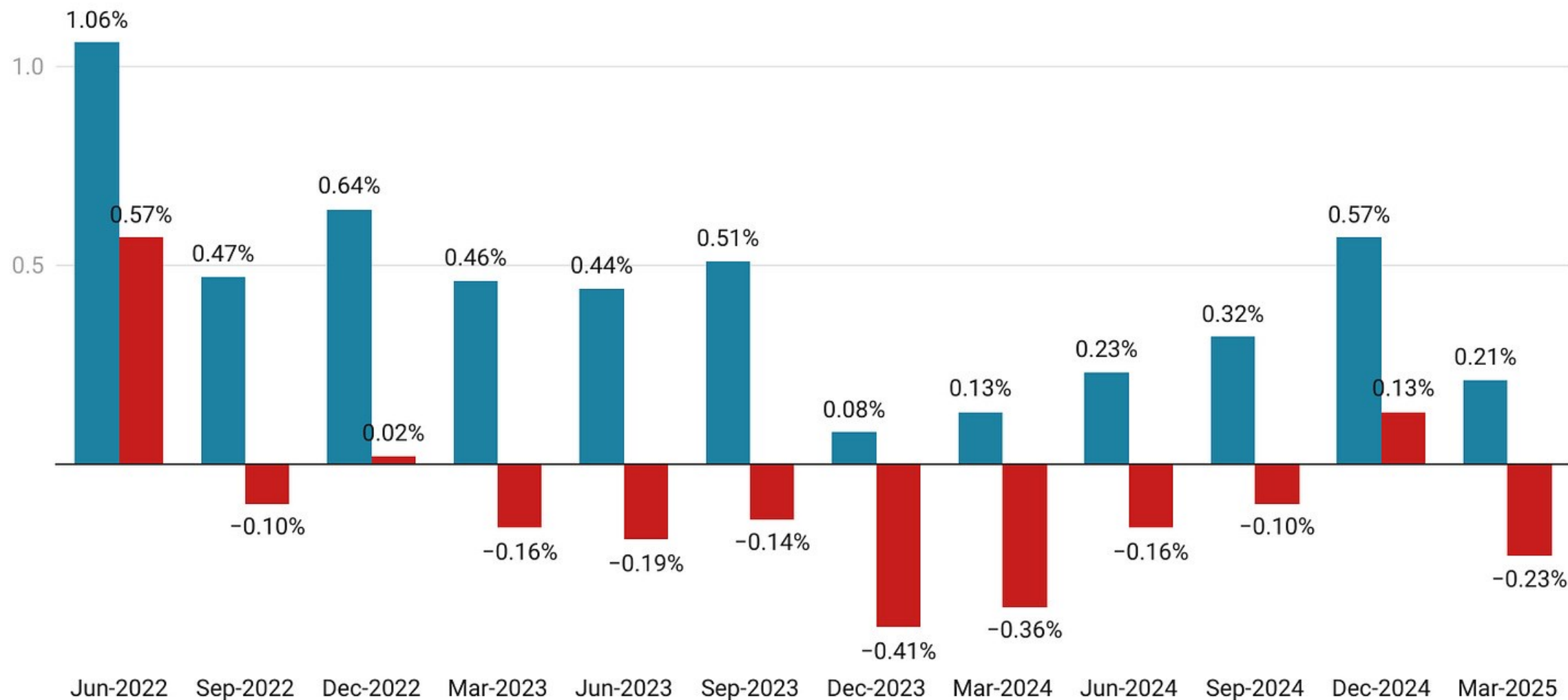
Workforce
availability

Strong
Employment



Australia - Quarterly GDP vs GDP Per Capita Growth

■ GDP ■ GDP Per Capita





ADL

MEL

SYD

PER

BNE



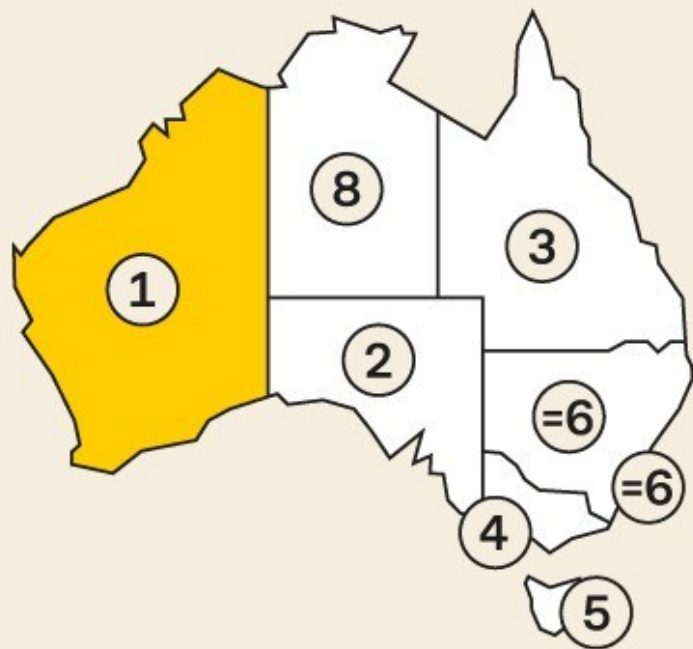


State of the States

July 2025



Commonwealth
Bank



1. WA

Strength

Retail spending.

Weakness

Economic growth.

2. SA

Strength

Construction work.

Weakness

Relative population growth.

3. QLD

Strength

Housing finance.

Weakness

Equipment spending.

4. VIC

Strength

Retail spending.

Weakness

Relative unemployment.

5. TAS

Strength

Relative unemployment.

Weakness

Relative population growth.

=6. ACT

Strength

Economic growth.

Weakness

Dwelling starts.

=6. NSW

Strength

Equipment spending.

Weakness

Housing finance.

8. NT

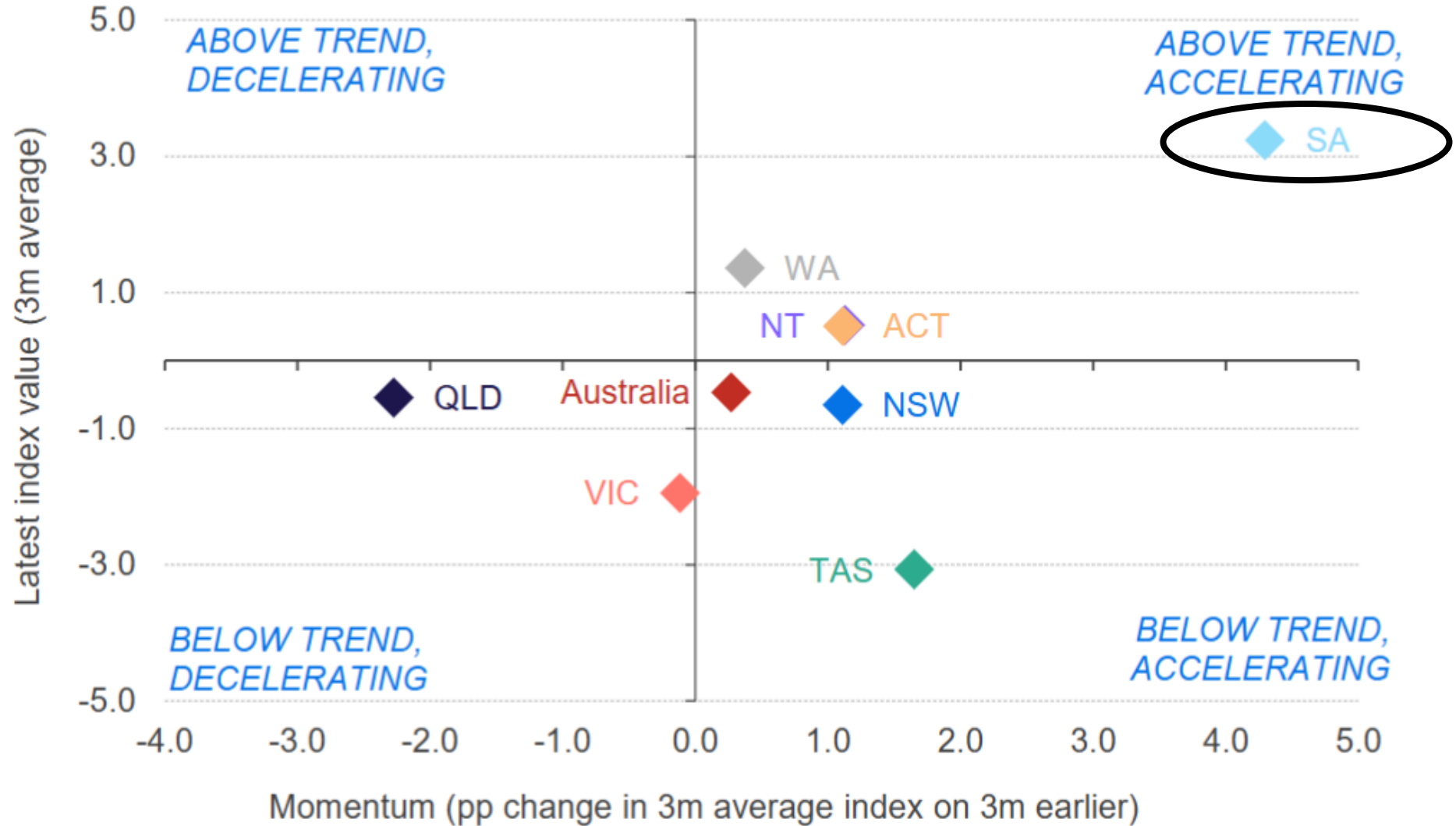
Strength

Relative population growth.

Weakness

Equipment spending.

ANZ Stateometer (Q1 2025)



Note: 'Australia' is the gross state product-weighted combination of the state and territory indices.

Source: ABS, CoreLogic, NAB, SEEK, Westpac-Melbourne Institute, FCAI, ANZ Research



Key Indicators (City of Adelaide)



Economy

▲ \$25.5b

+0.7%
YoY change



Residents

▲ 29,118

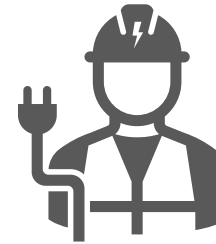
+4.1%
YoY change



Daily city users

▼ 371,000

-5.1%
YoY change



No. of workers

▲ 172,652

+1.8%
YoY change



No. of business

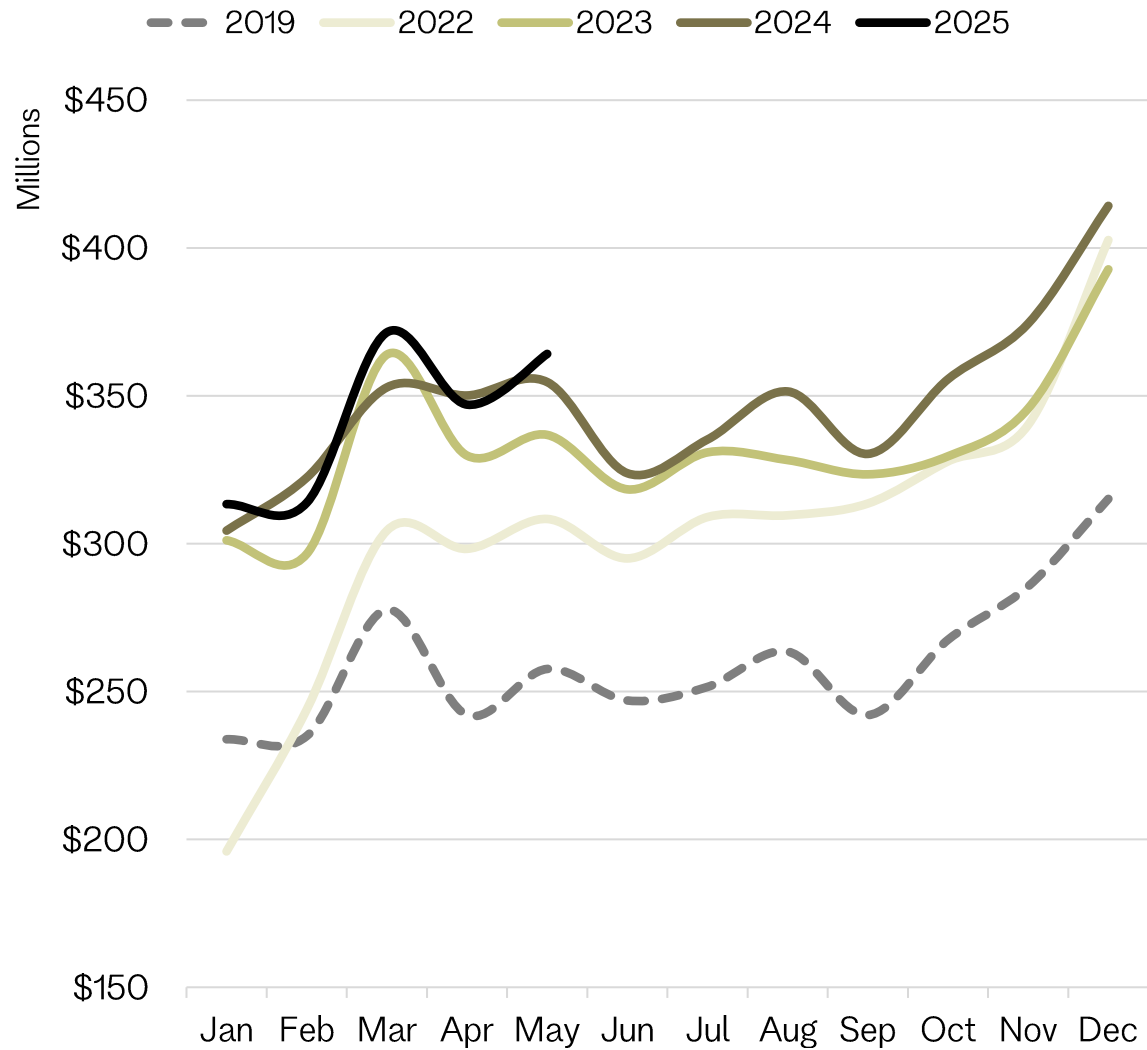
▲ 12,717

+157
YoY change

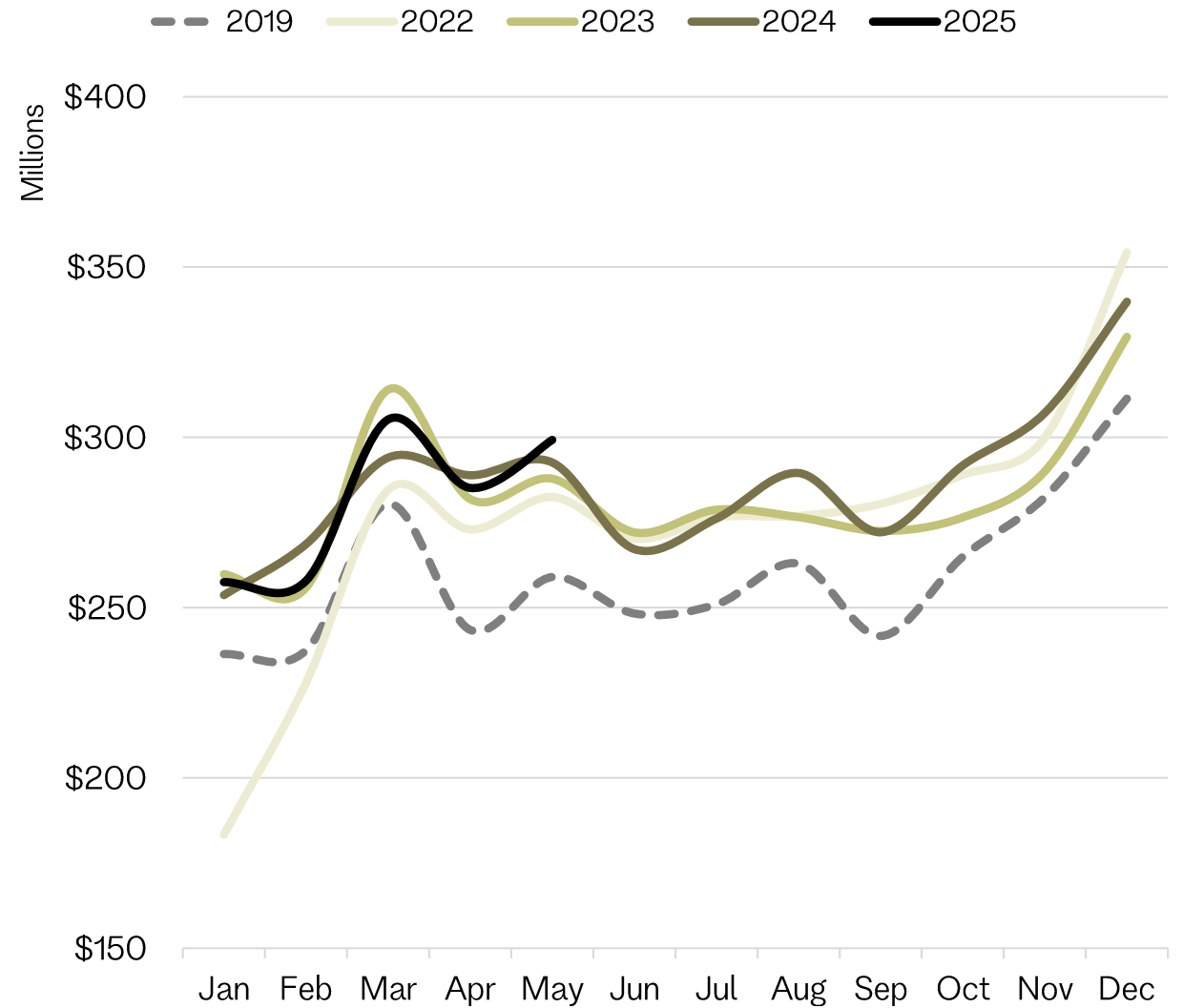
How does Adelaide stack up?

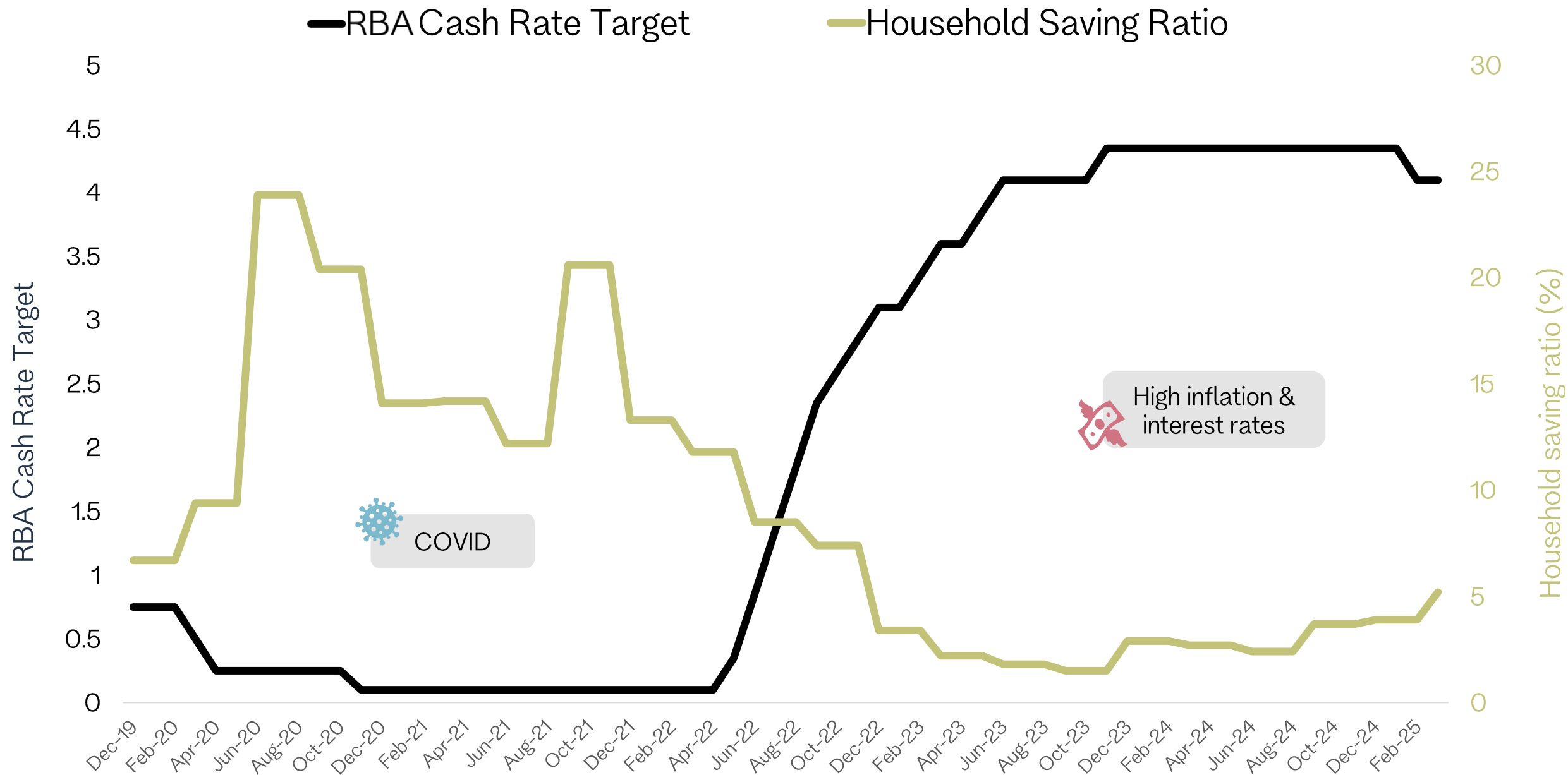
Gross Regional Product (GRP)	GRP YoY change (3-year average)	GRP YoY change (as of June 2024)
City of Perth	6.3%	0.4%
City of Adelaide	5.3%	0.7%
Canberra region	3.9%	1.0%
City of Melbourne	3.8%	1.8%
City of Brisbane	3.3%	1.6%
RDA Northern Territory	2.5%	7.2%
Tasmania region	2.5%	1.0%
City of Sydney	1.6%	1.8%

Nominal Expenditure (City of Adelaide)

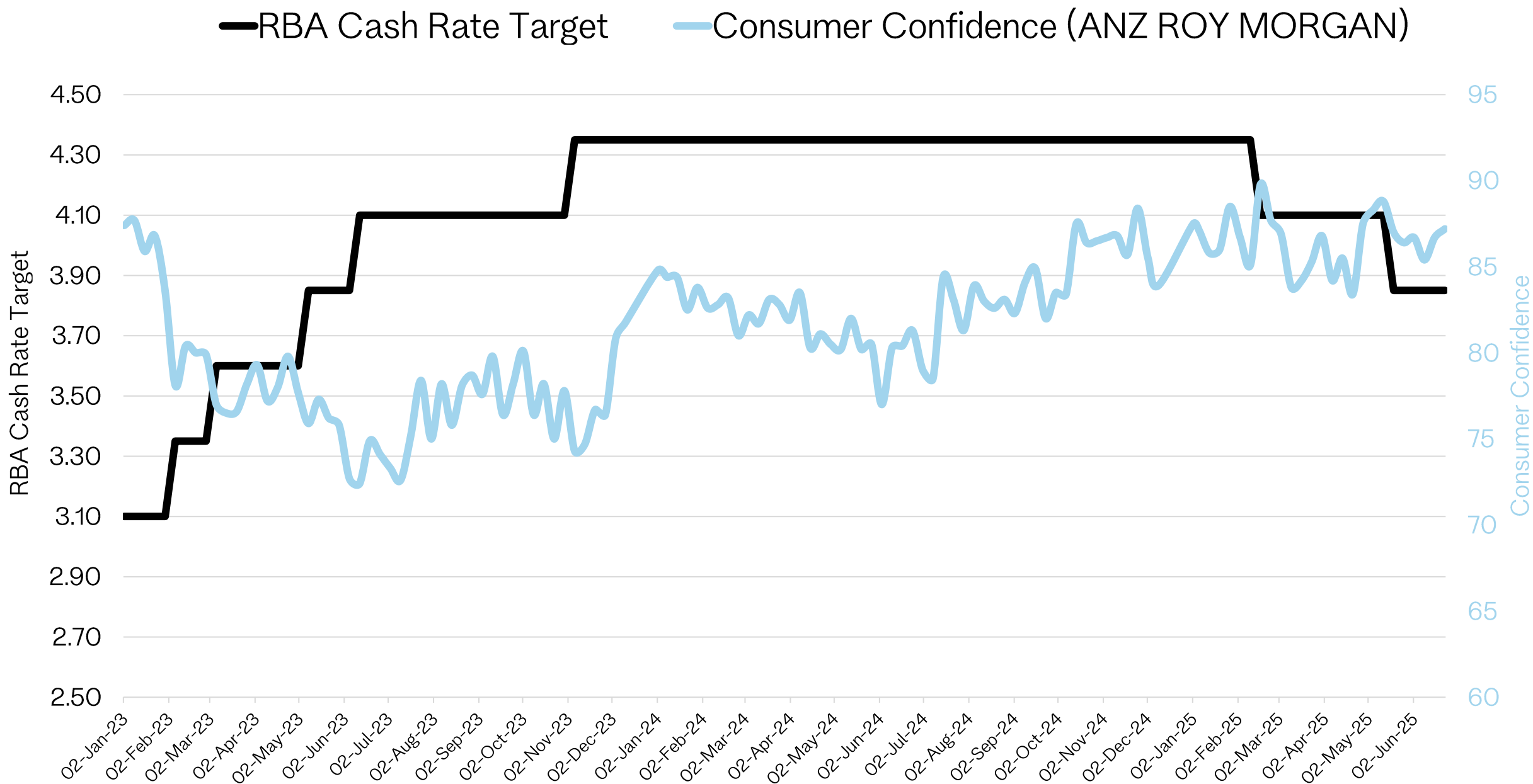


Real Expenditure (City of Adelaide)



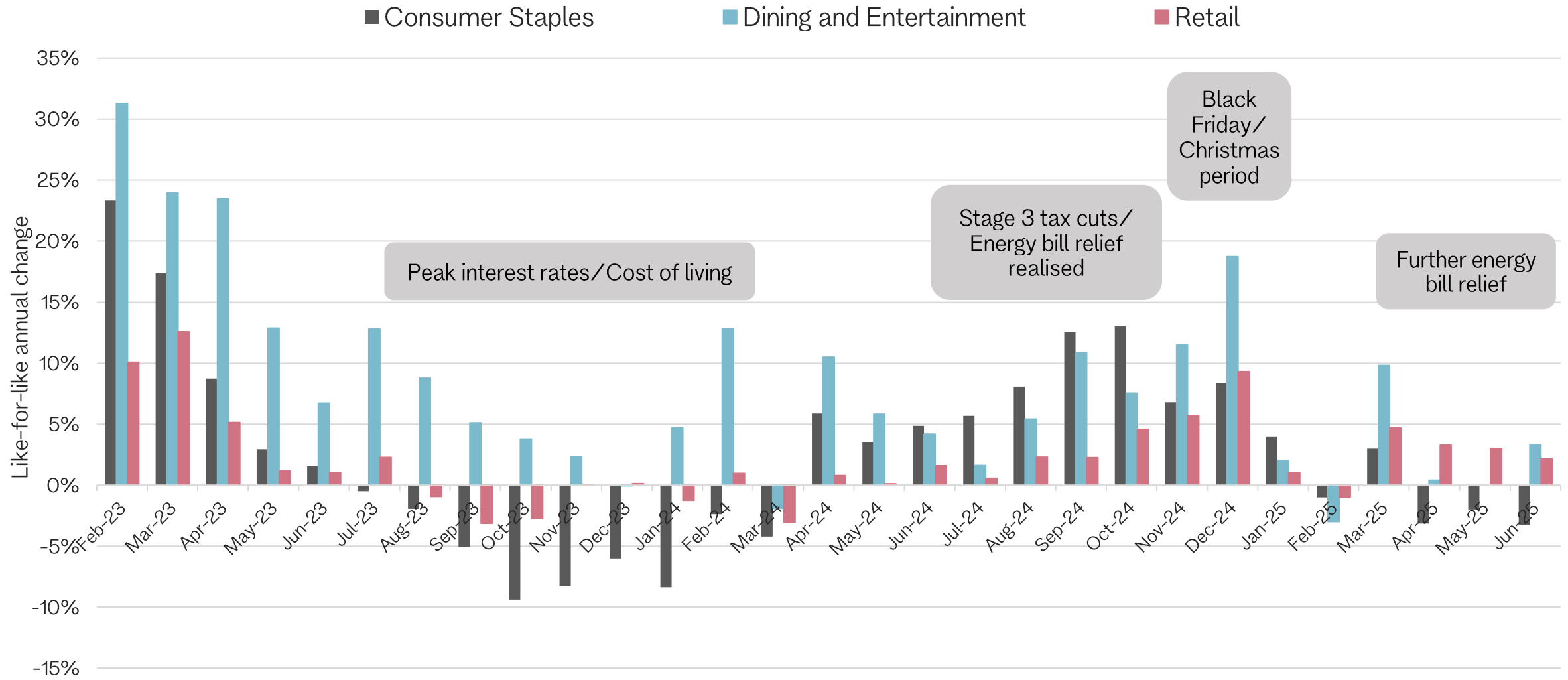


Source: RBA - Cash Rate Target | ABS - Australian National Accounts



Expenditure by categories

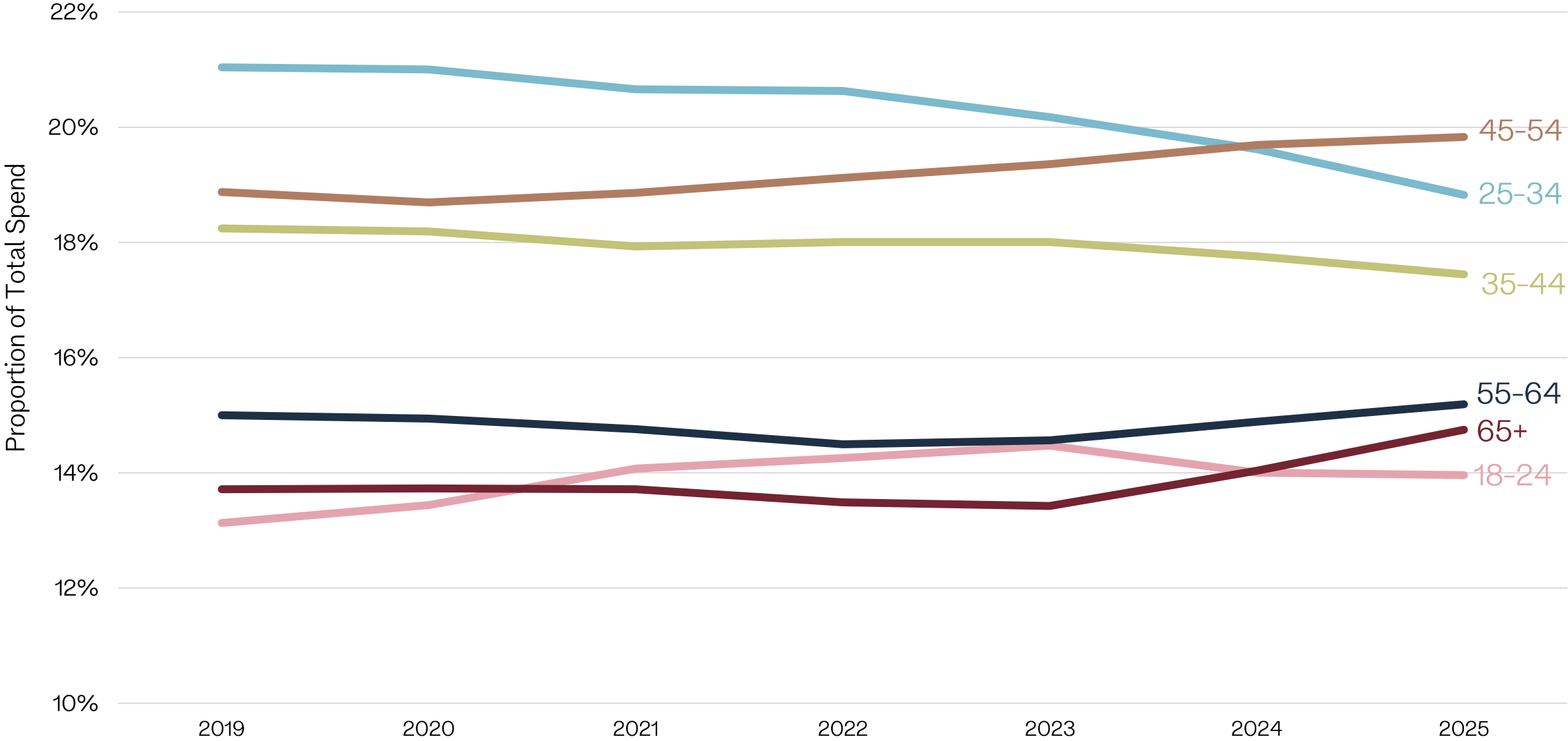
(City of Adelaide, like-for-like annual monthly change)





Proportion of Expenditure by Age Group

(City of Adelaide LGA area)

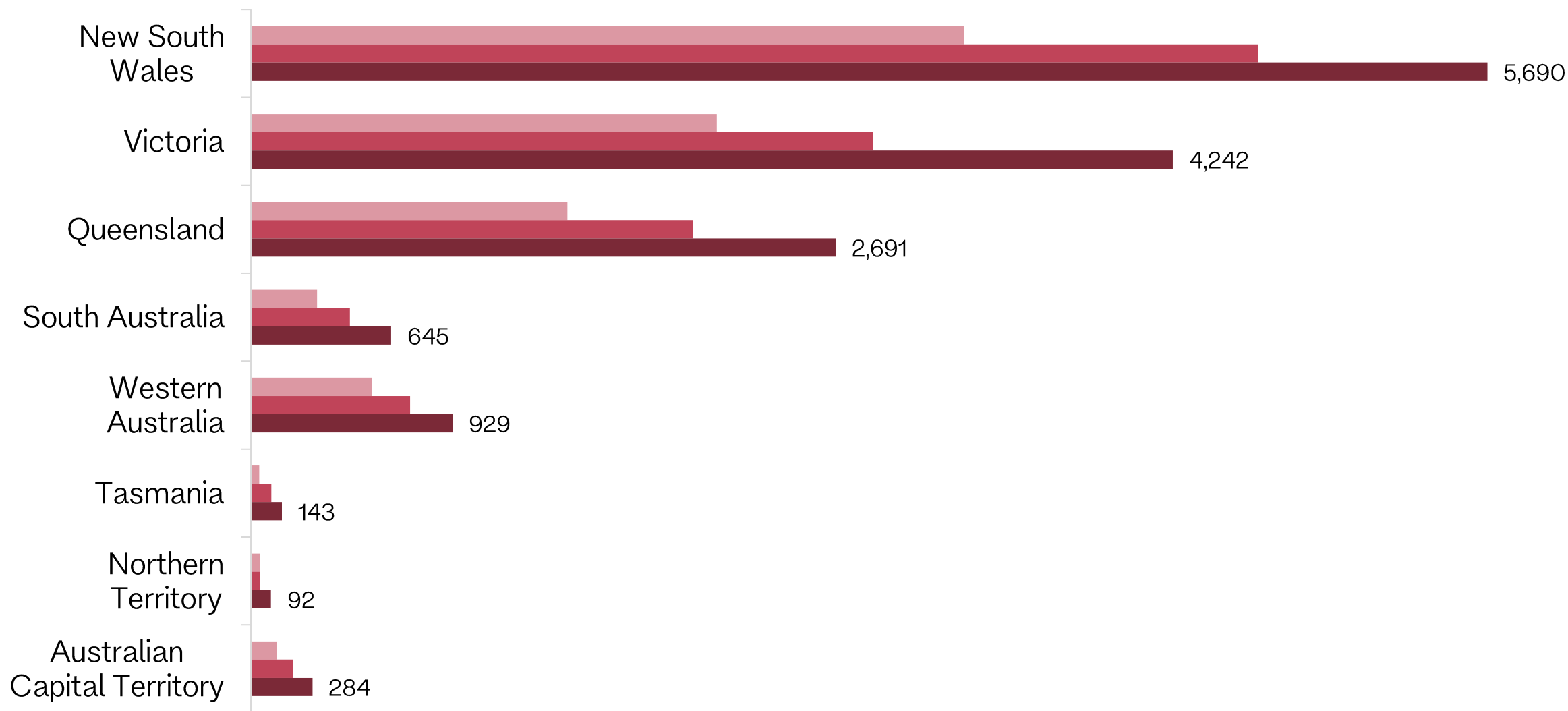




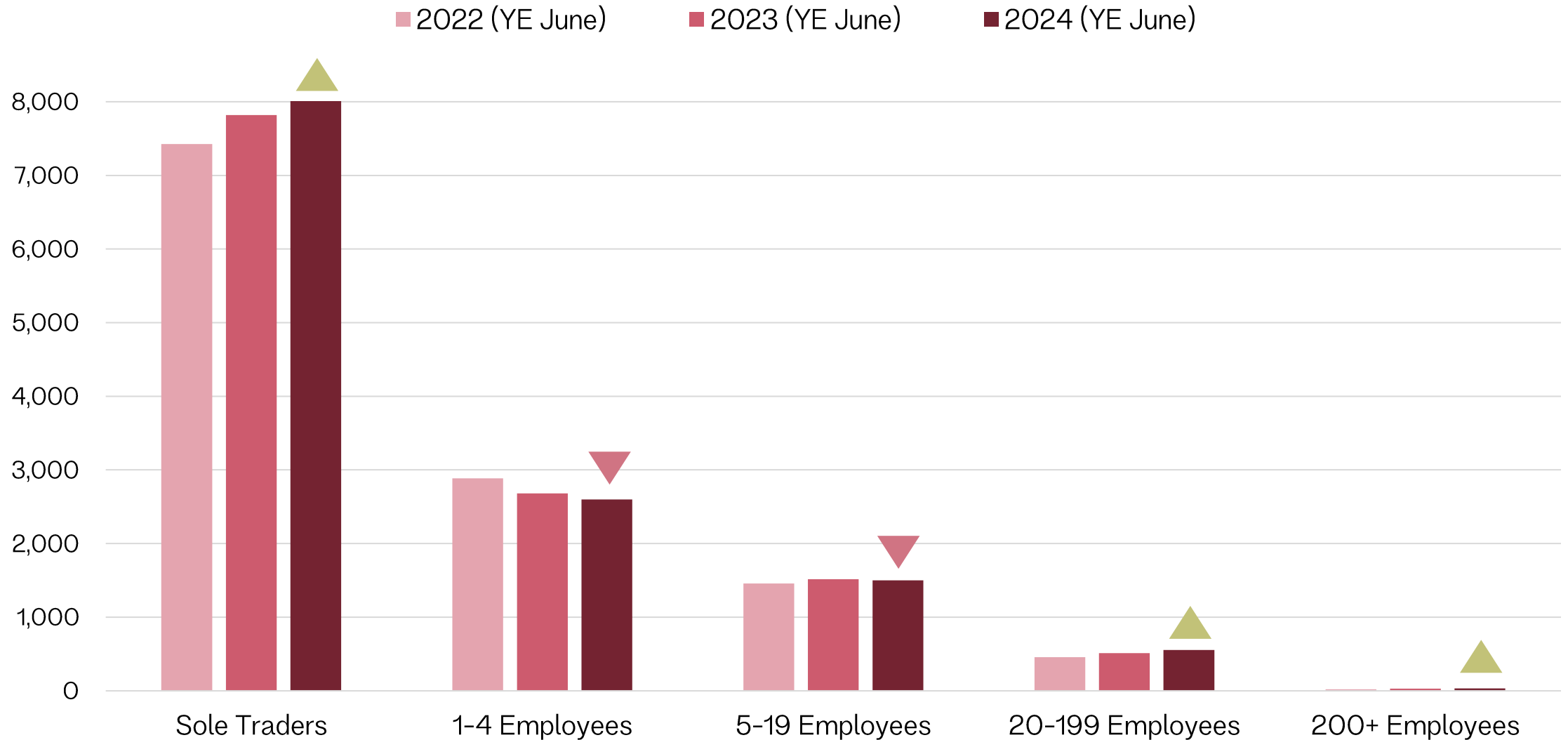
First-Time Business External Administration by State

(Principal place of business)

30 Jun 2023 30 Jun 2024 30 Jun 2025

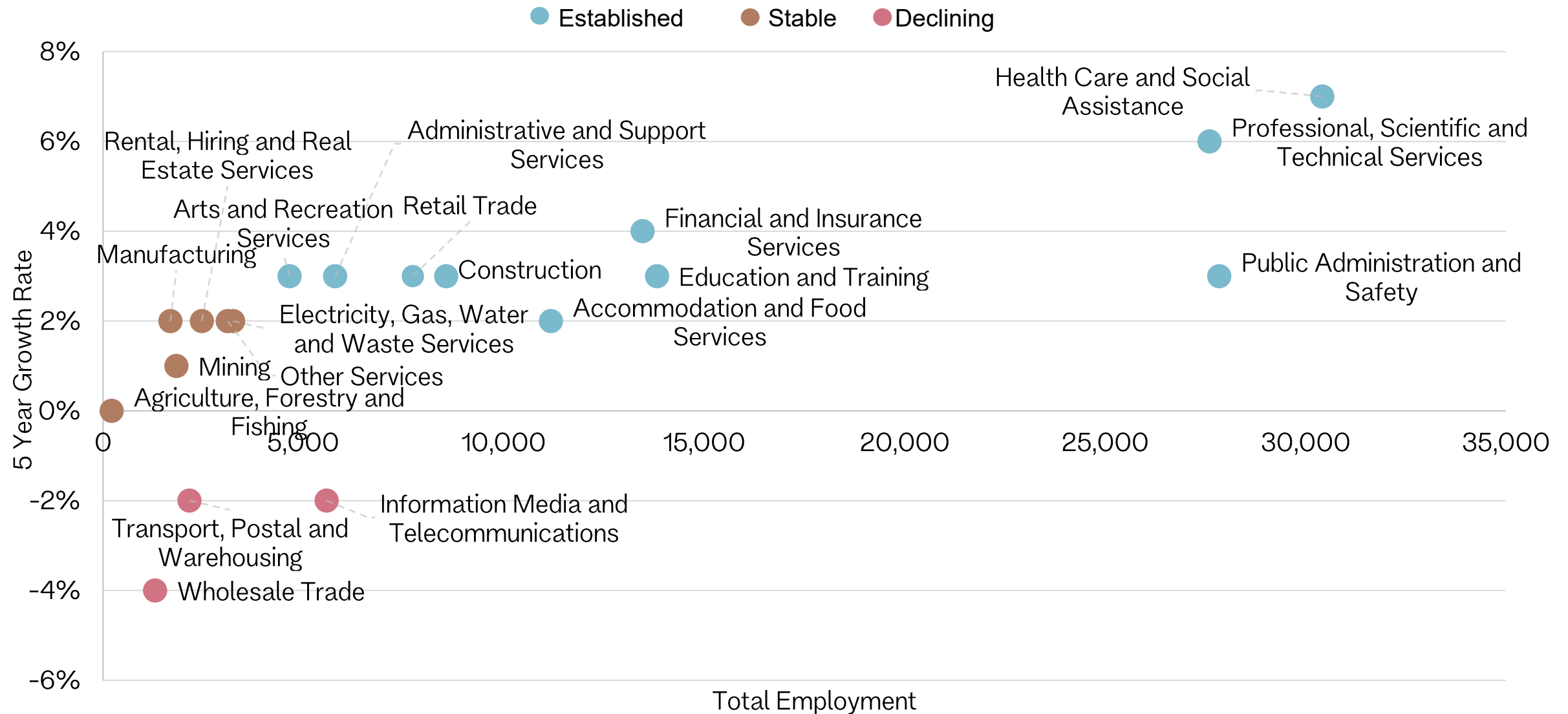


Businesses by size (City of Adelaide)



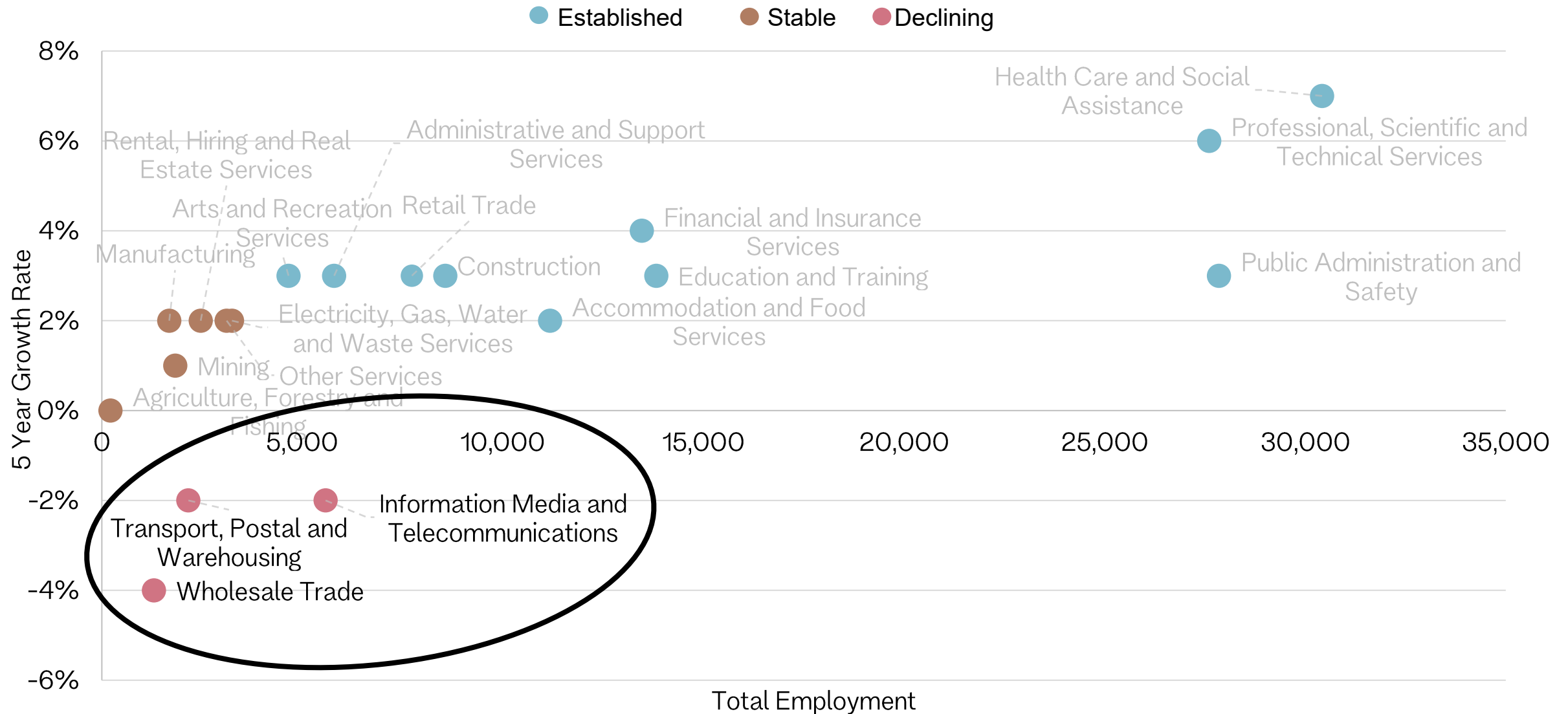
Highest Growing Industries by Employment

(City of Adelaide LGA area as of 2023/24 FY)



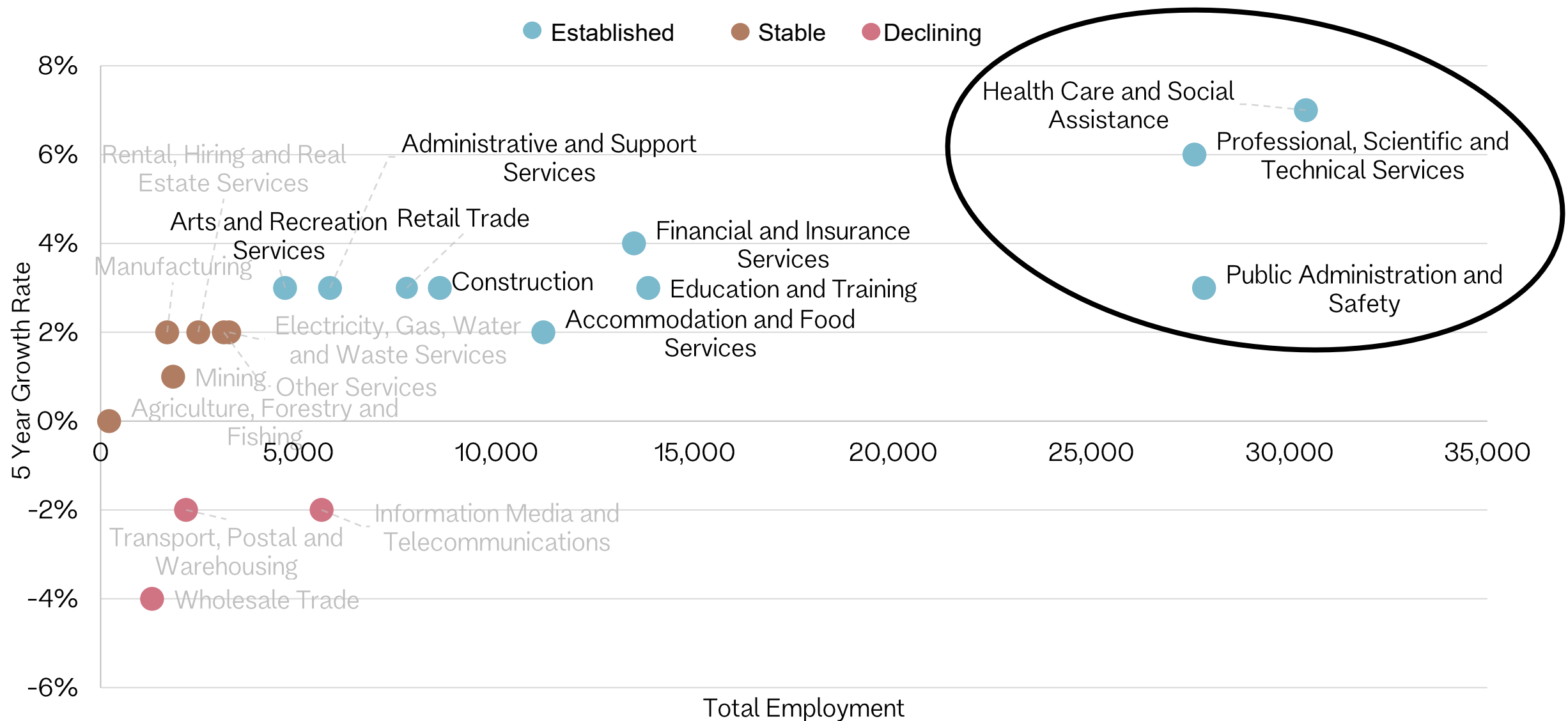
Highest Growing Industries by Employment

(City of Adelaide LGA area as of 2023/24 FY)



Highest Growing Industries by Employment

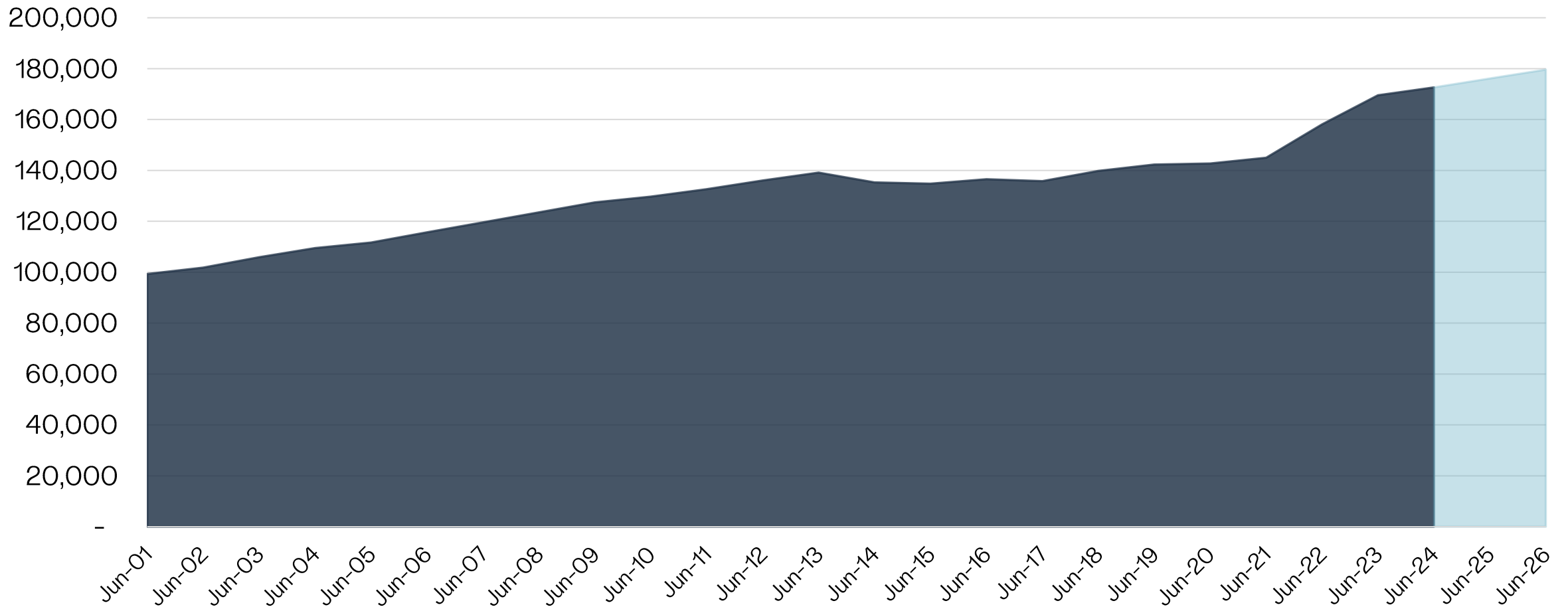
(City of Adelaide LGA area as of 2023/24 FY)



Total workers

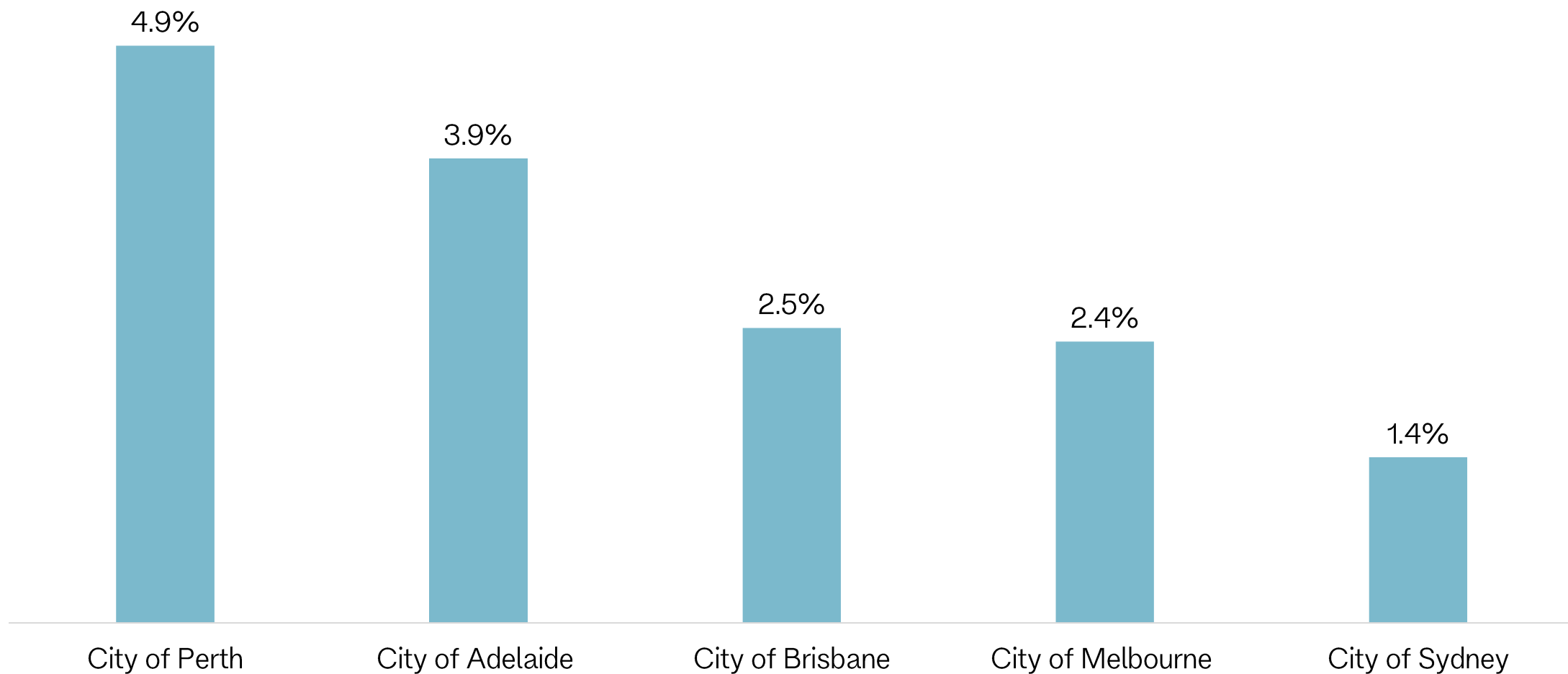
(City of Adelaide)

Local Jobs Forecast (Local Jobs)



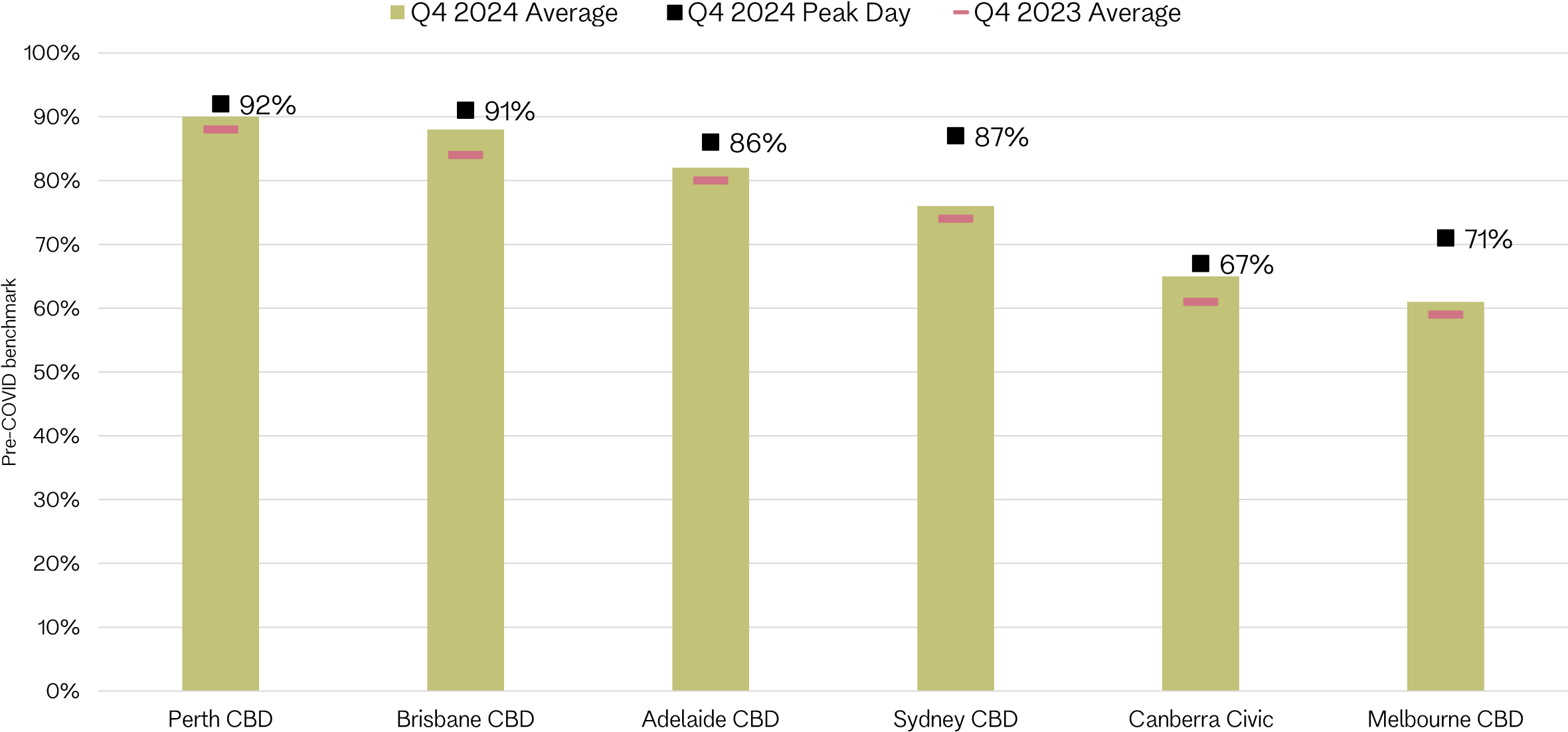
Job Growth by Capital City

(5 Year - Compound Average Growth Rate)





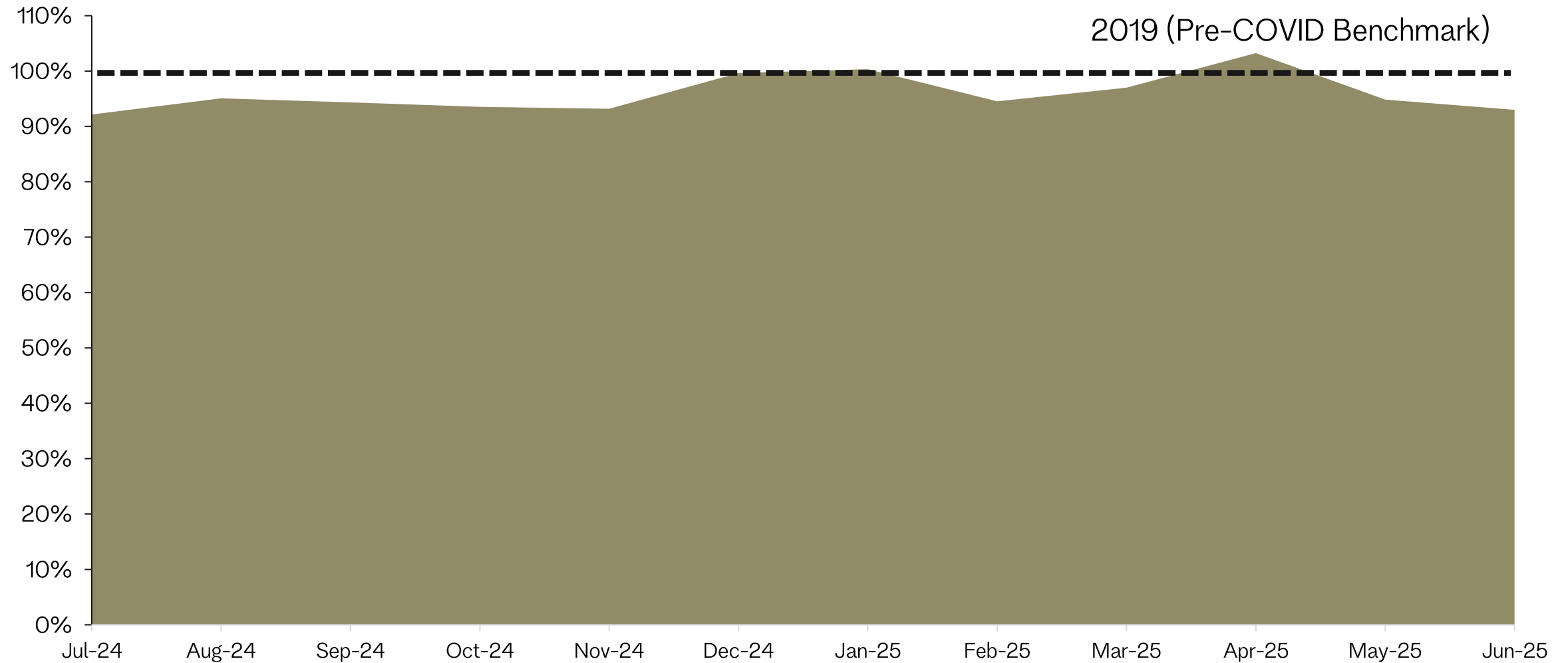
Office Attendance by CBD Market





Monthly Activity Levels Benchmarked to 2019

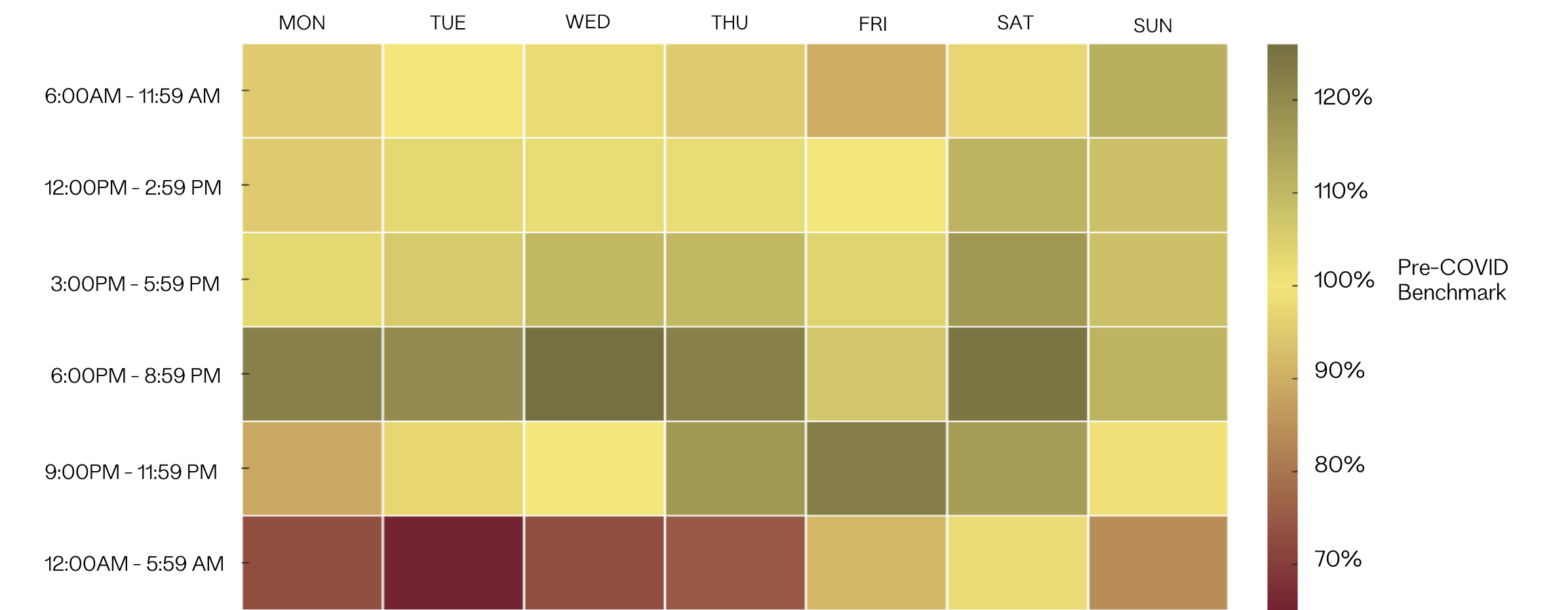
(City of Adelaide)



Visitor Expenditure by Hour – City of Adelaide

(Inflation Adjusted, Benchmarked to 2019 Levels, FY 24/25)

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





GENT ARCADE

ADELAIDE CENTRAL PLAZA

DAVID

FEELING LONELY?
It's time to visit
Cine Central

SOLID GOLD
DIAMONDS

AR

ADELAIDE CENTRAL PLAZA

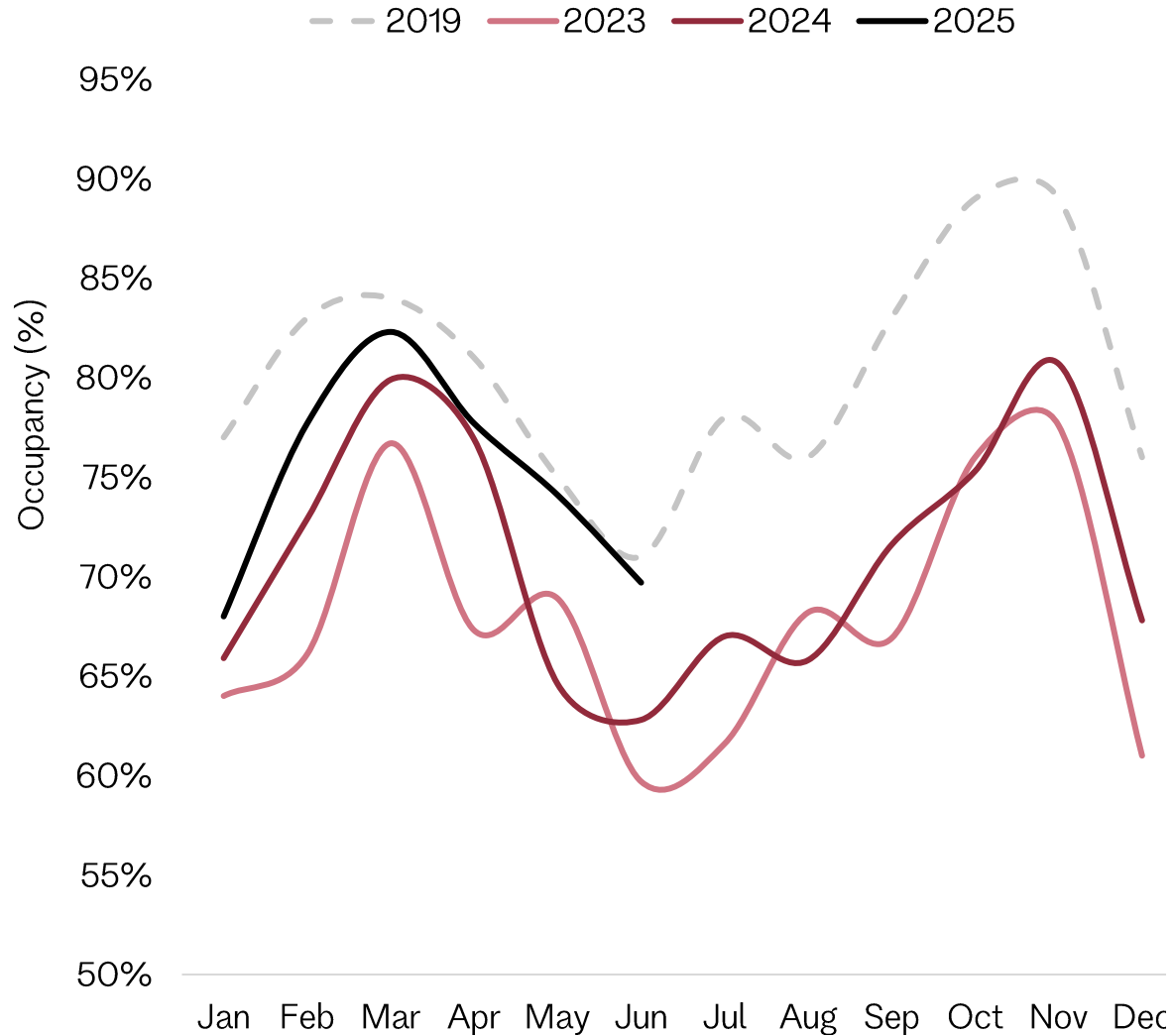
PANDORA

VERONIKA MAINE

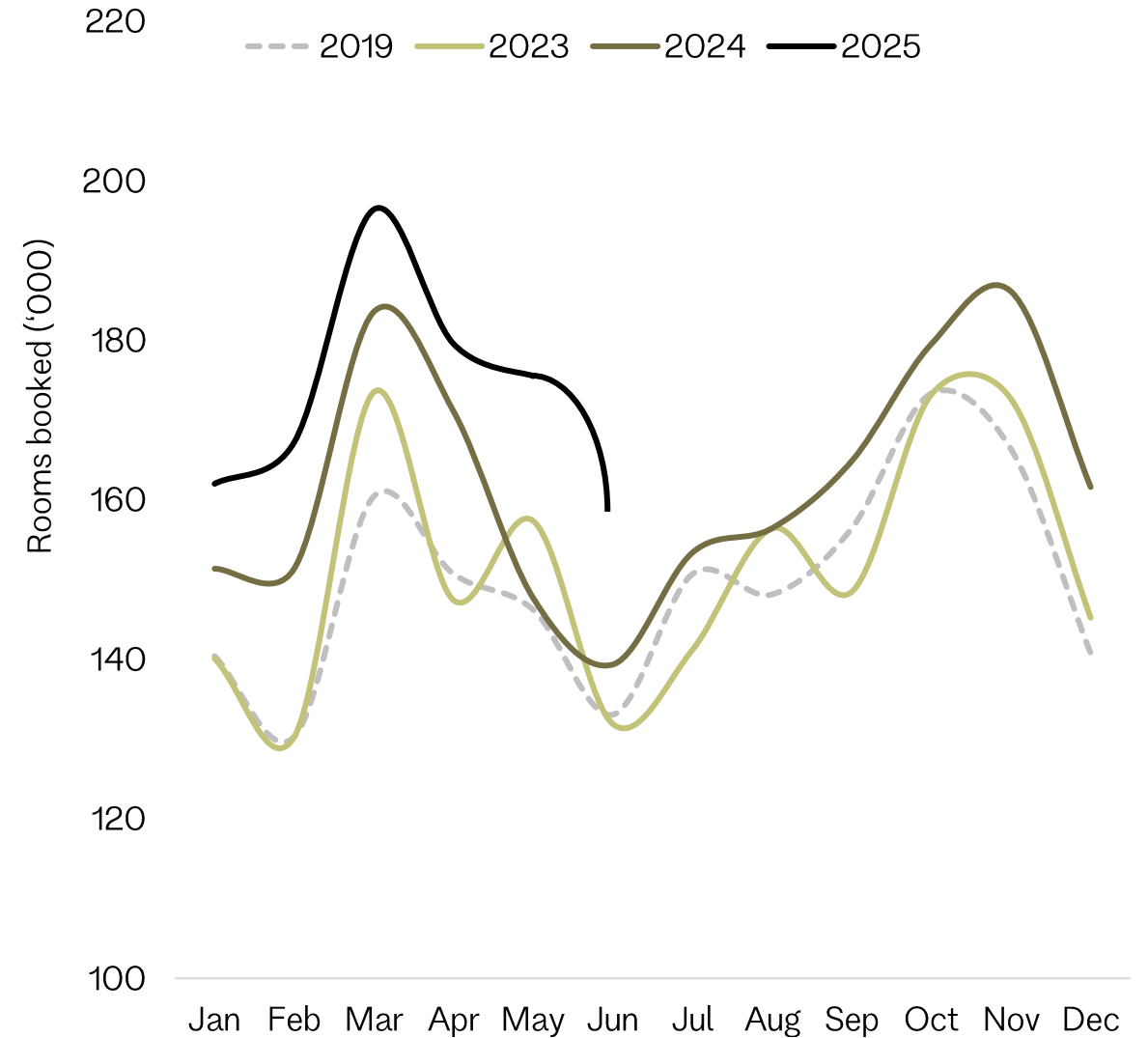
CUE

Levi's

Hotel Occupancy (City of Adelaide)

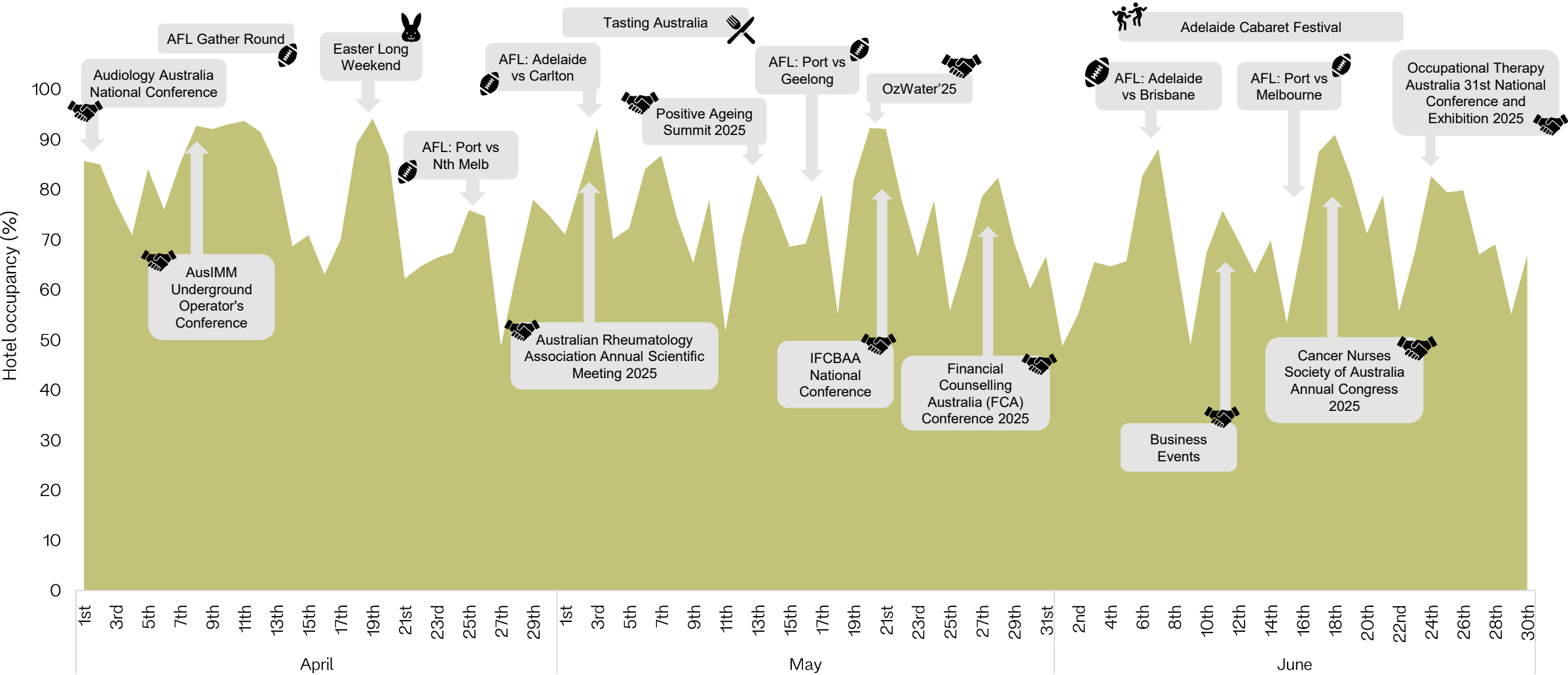


Hotel Rooms Booked (City of Adelaide)



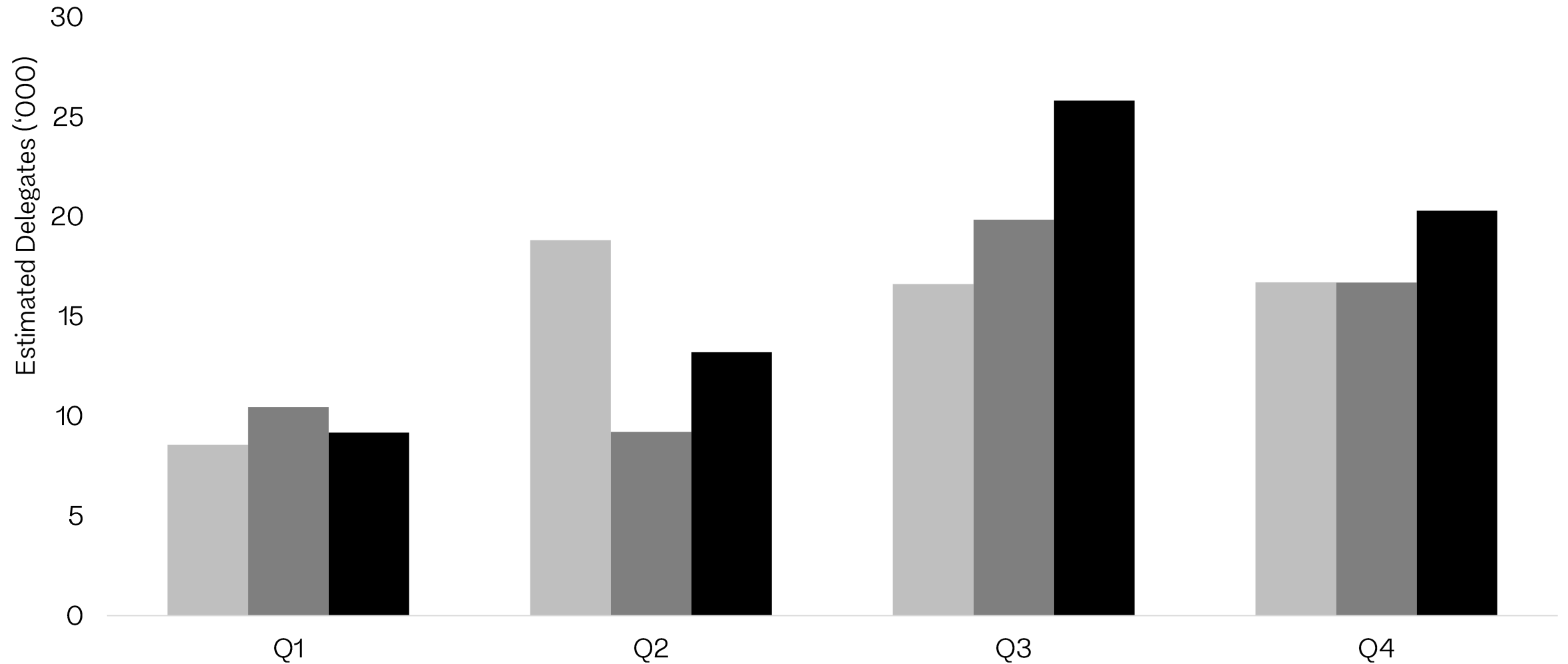
Hotel Accommodation (City of Adelaide)

Occupancy – Q2 2025



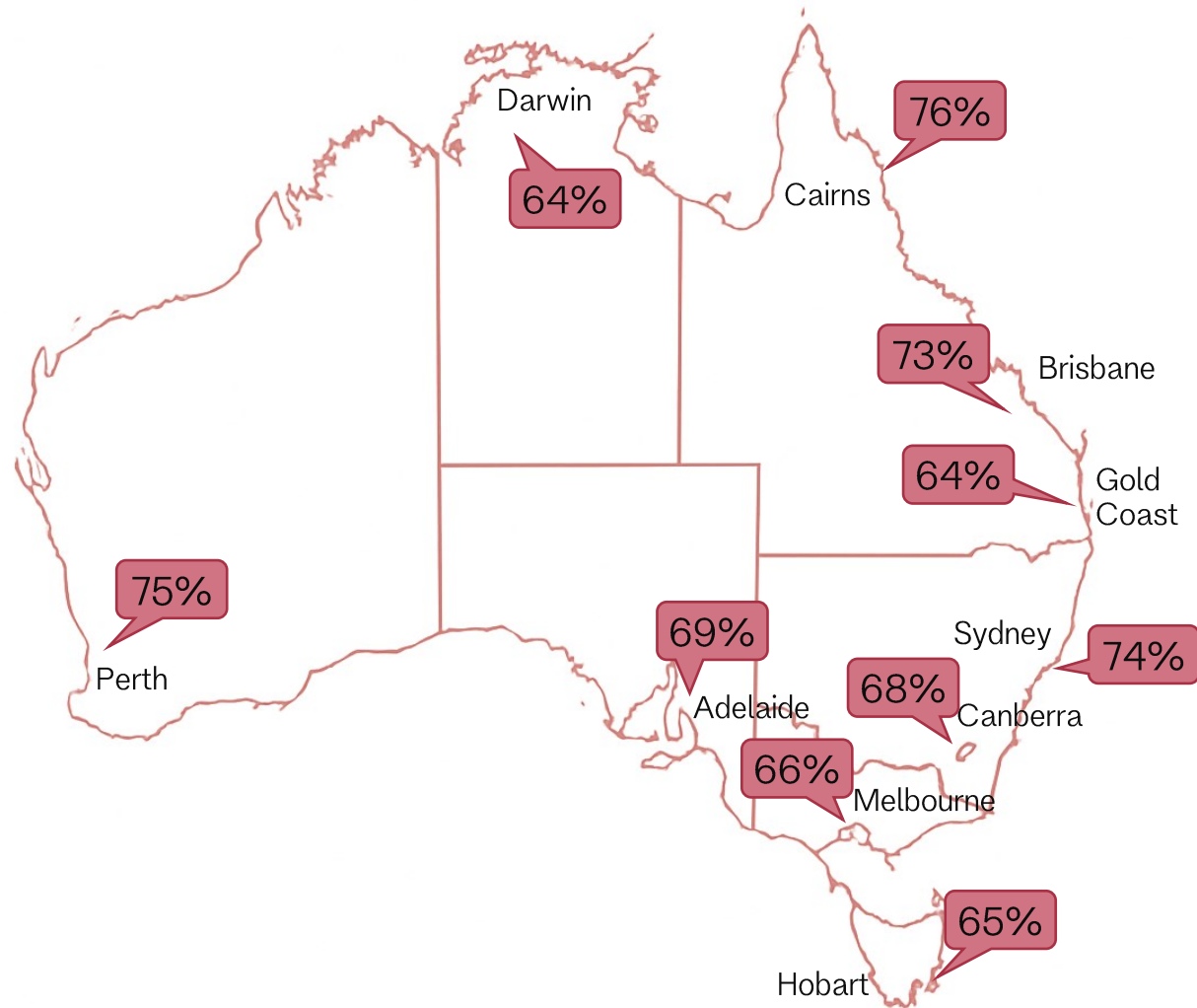
Business Event (Estimated Delegates)

■ 2023 ■ 2024 ■ 2025



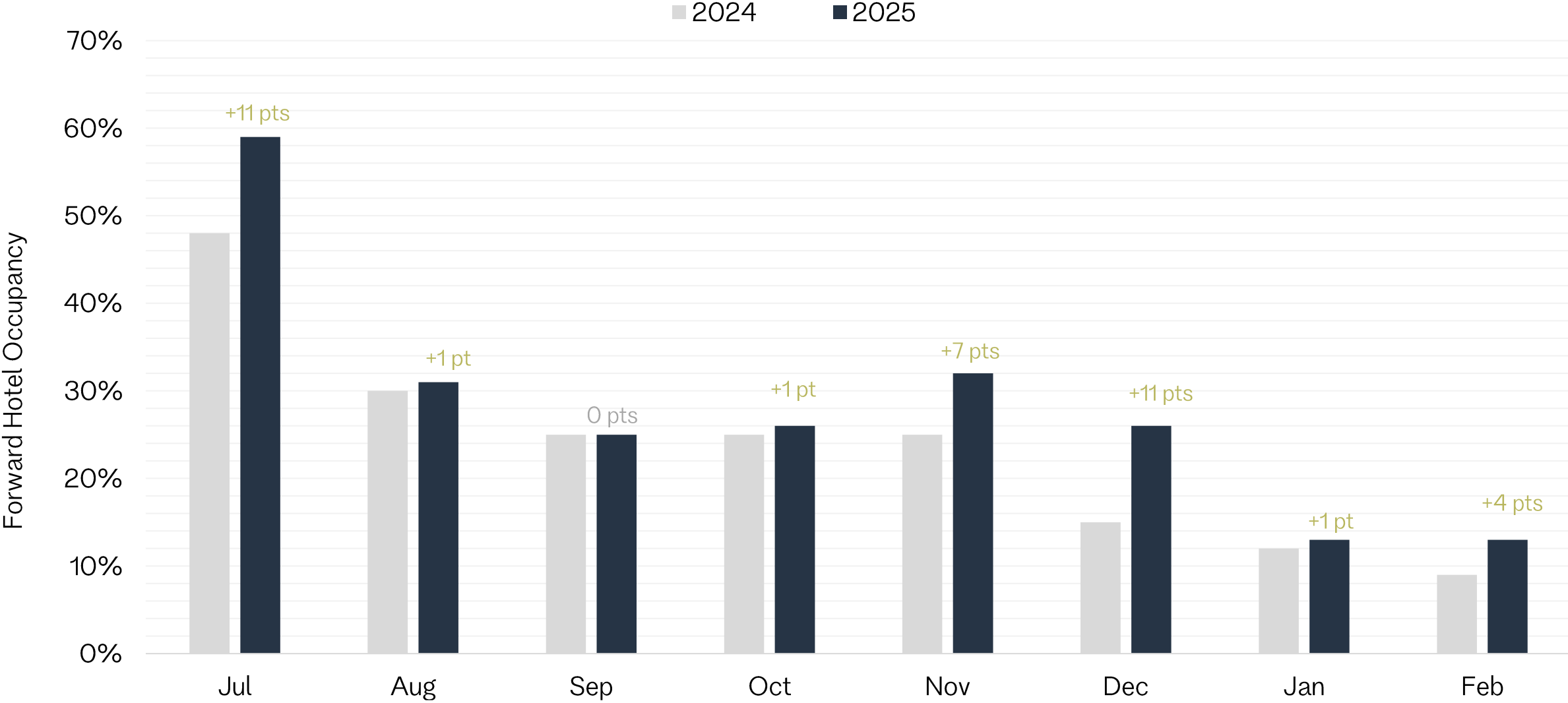
Hotel Accommodation – National Occupancy

Great capital city area – Q2 2025



Forward Hotel Occupancy

(City of Adelaide)



Source: STR (as of 7 July 2025)

T A T T O O

DAY ONE
T A T T O O

For Sale

property @comcast.net 027074

For Sale

Sold

175 Highland Avenue
Northampton, MA 01060

- 3 car garage
- hardwood floors
- finished basement

For Sale by Owner
Showing by Appointment Only
March 2021 at 4pm

Jodi Hanley
0426 907 520

Roger Kline
0423 303 373

JLL

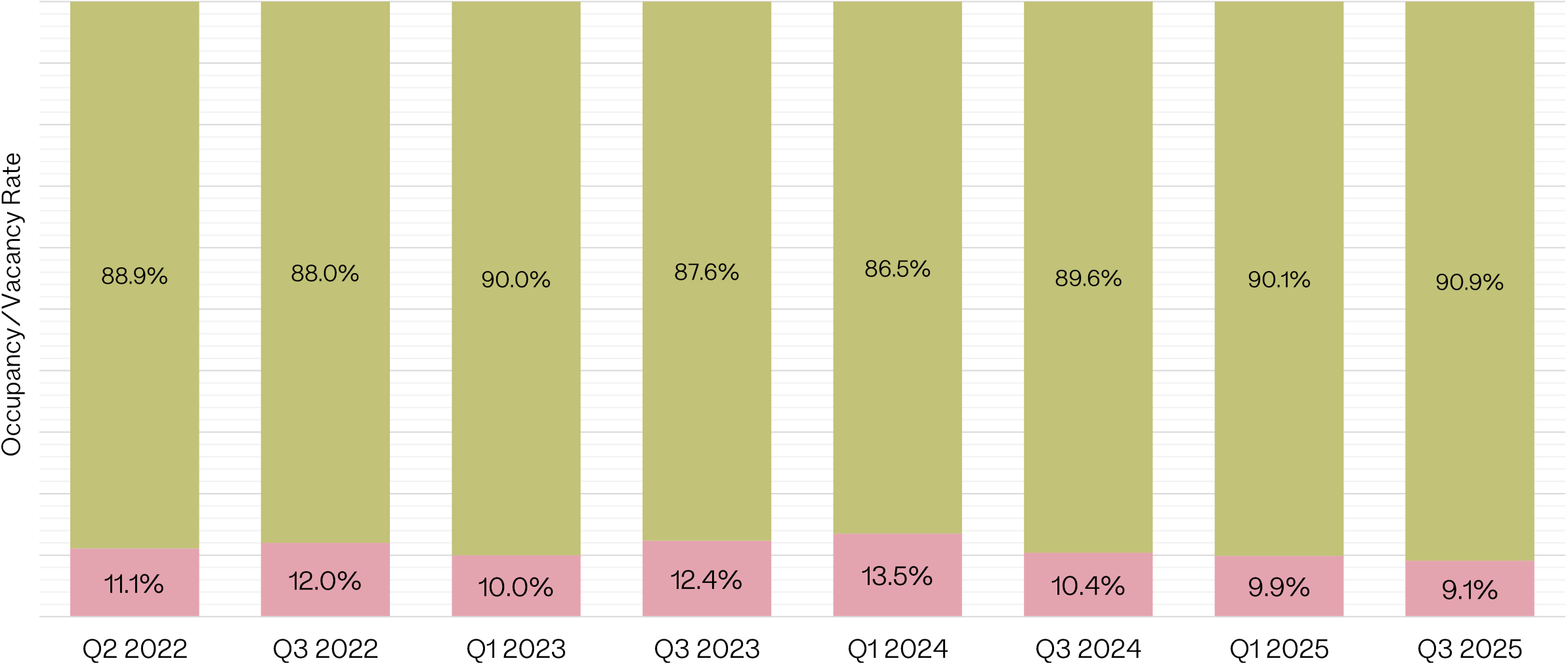
Prezzo

AT ALL
TIMES

Main Street Tenancy Levels

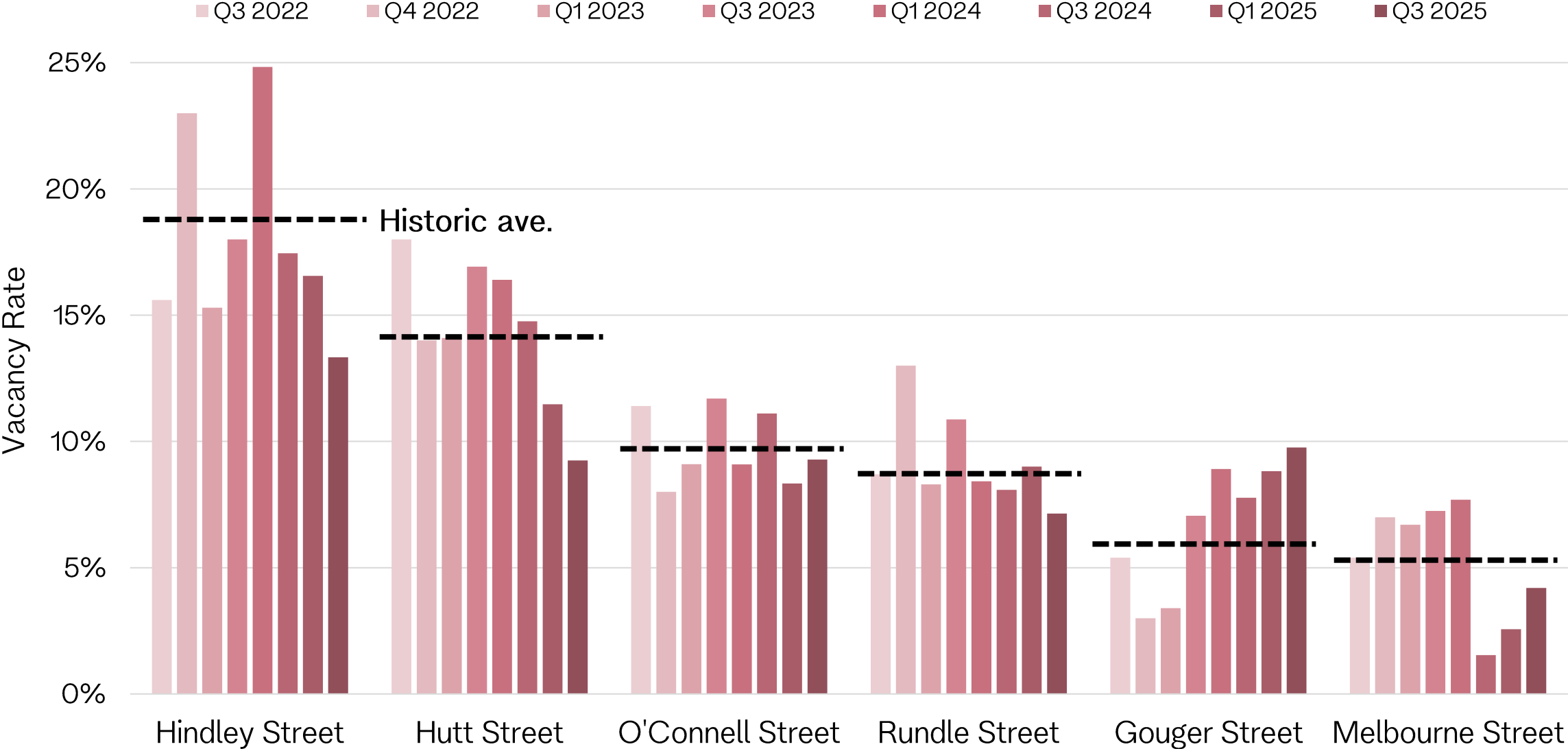
(Historic comparison)

Vacant Occupied



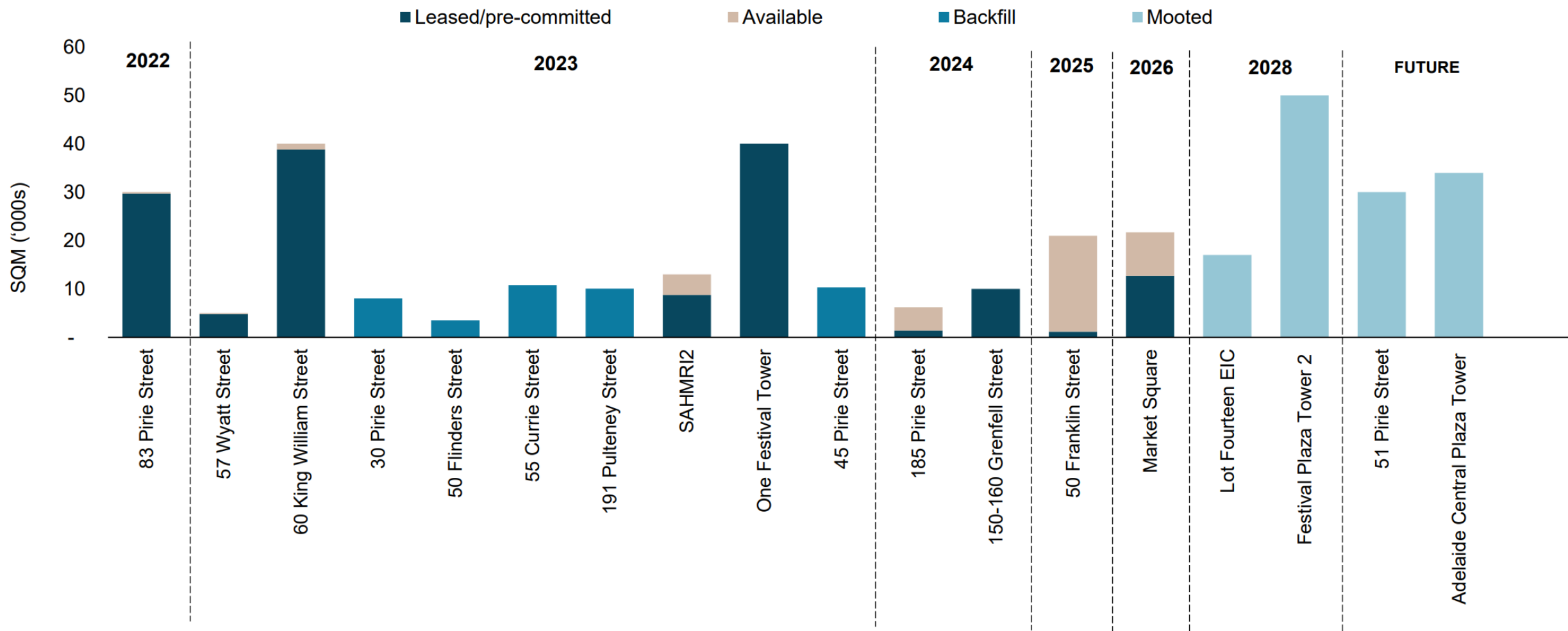
Main Street Vacancy

(Historic comparison)



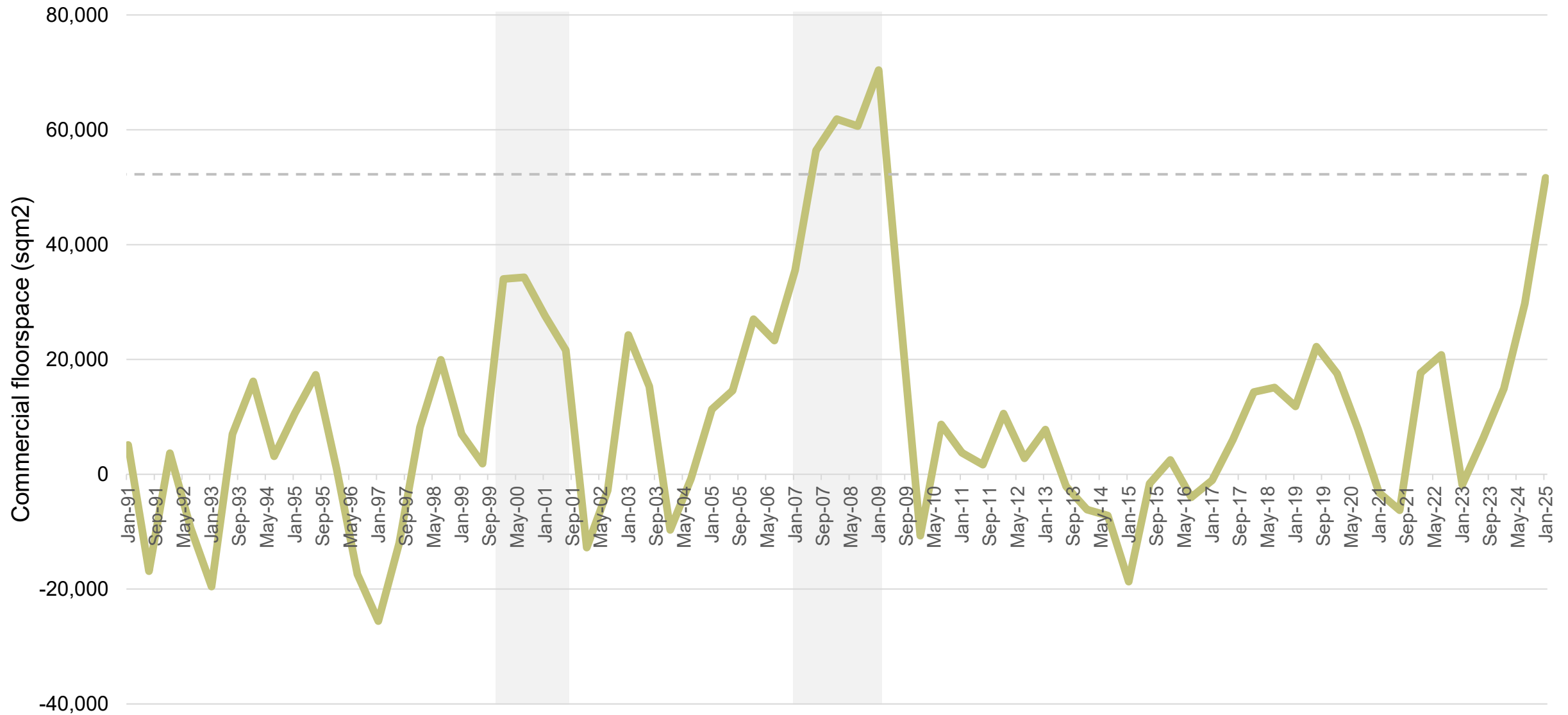
Adelaide Office CBD supply pipeline

(By lease/pre-commitment status)



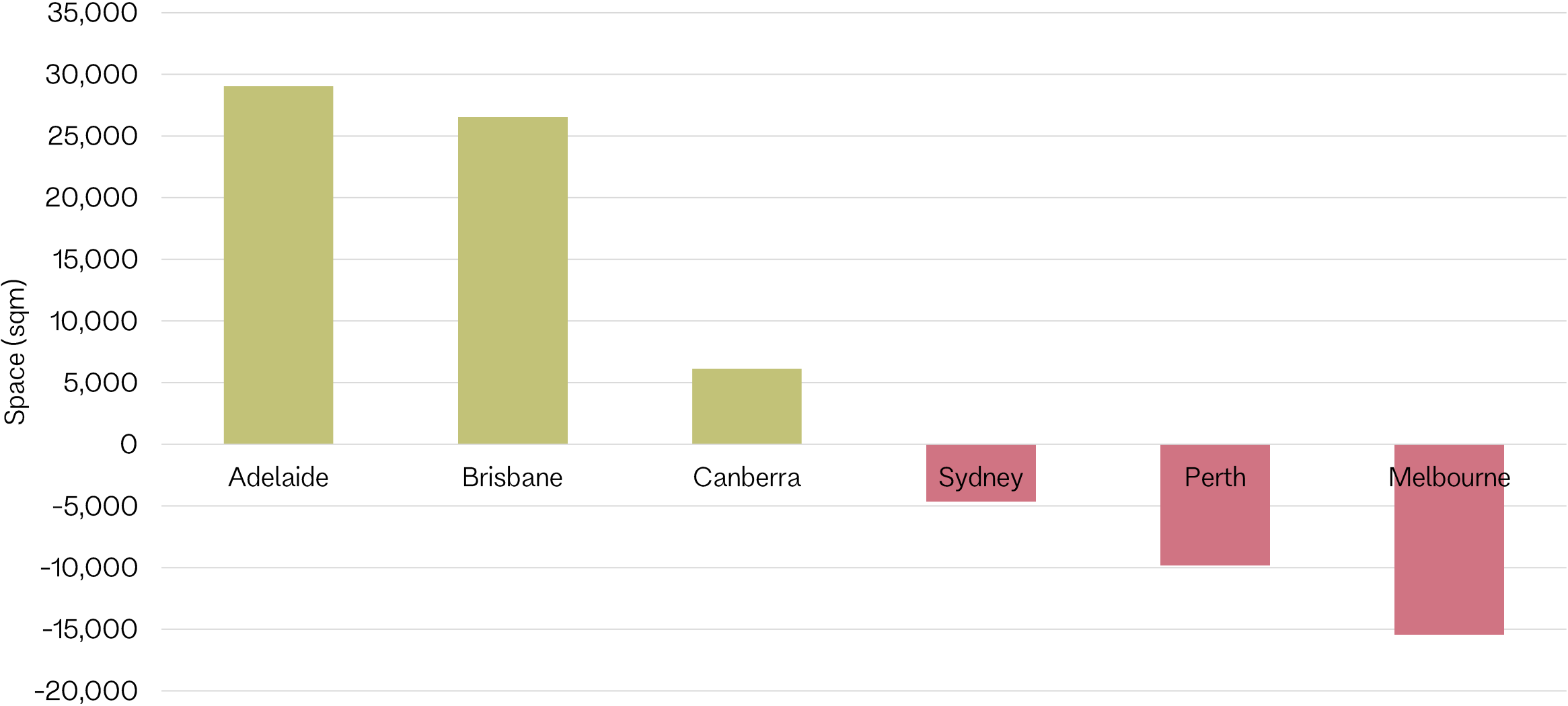
Audited Net Absorption

Adelaide CBD (12 months prior to...)



Audited Net Absorption by Capital City

(6 months to July 2024)



Source: Property Council of Australia

Adelaide is
going places.



Number of workers
and businesses

Visitor economy

Event attendance

Property demand

Daily visitors/
Flexible working

Consumer
expenditure

Economic growth



Access
Data & Insights



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