ACARA Data Analysis for Schools

What can be learned from the 2022 ACARA data for schools?

By Peter Buckingham BSc GradDip MktMdl CFE FIMC CMC

The 2022 ACARA data nationally was released earlier this month.
Whilst it does not tell us the 2023 situation, we can see the enrolments data now from 2008 – 2022.

The biggest learnings are
1. Independent Schools are continuing to do well
2. Government Schools are struggling
3. Catholic Schools have slightly improved their market share.

We want to show you the winners (and losers) from the data over the last few years and feel the major period of interest is 2019 (pre-Covid) to 2022 (first full year of the post COVID period).
The National position can be best shown as follows:

AUSTRALIA							
Full Time Equivalent Enrolments							
					2019 - 2022	**2020 - 2022**	**2021 - 2022**
Year	**2019**	**2020**	**2021**	**2022**	**%**	**%**	**%**
Catholic	**716,774**	**727,194**	**737,362**	**745,401**	**3.99%**	**2.50%**	**1.09%**
Combined	104,714	110,878	118,004	124,309	18.71%	12.11%	5.34%
Primary	354,703	354,030	354,086	354,710	0.00%	0.19%	0.18%
Secondary	254,588	259,298	262,238	263,316	3.43%	1.55%	0.41%
Special	2,769	2,989	3,033	3,066	10.74%	2.60%	1.10%
Government	**2,603,138**	**2,641,882**	**2,635,773**	**2,619,520**	**0.63%**	**-0.85%**	**-0.62%**
Combined	192,095	196,101	197,522	200,610	4.43%	2.30%	1.56%
Primary	1,498,154	1,500,105	1,487,390	1,457,899	-2.69%	-2.81%	-1.98%
Secondary	879,857	912,378	917,229	925,952	5.24%	1.49%	0.95%
Special	33,032	33,299	33,632	35,059	6.14%	5.29%	4.24%
Independent	**629,780**	**645,907**	**669,049**	**690,734**	**9.68%**	**6.94%**	**3.24%**
Combined	548,642	562,133	582,840	602,862	9.88%	7.25%	3.44%
Primary	28,465	28,177	29,270	28,458	-0.03%	0.99%	-2.77%
Secondary	41,389	42,365	43,493	44,722	8.05%	5.56%	2.83%
Special	11,283	13,231	13,447	14,693	30.22%	11.05%	9.26%
Grand Total	**3,949,691**	**4,014,983**	**4,042,184**	**4,055,655**	**2.68%**	**1.01%**	**0.33%**

The critical numbers I wish to draw your attention to from 2019 - 2022:
1. Total Full Time Equivalent Enrolments increased by 2.68%
2. Government schools only increased by 0.63%
3. Catholic schools increased by 3.99%
4. Independent schools increased by 9.68%

It appears that many students have moved from Government Schools to Independent Schools.

I liken it to if the share market is up 10%, you really should be measuring your individual situation on whether you have done better or worse than the average (+10%), and assess your own decisions or those of your advisors on that, not just that you have made a "profit".

If you are only up 5%, then you have gone backwards compared to the market, and if you made 15% - you have done very well!

Each school needs to consider this in light of their own circumstances. Many of the "sandstone" schools may have not wanted additional students, already had strong waiting lists, and just took in the additional enrolments that they felt was appropriate.

Other independent schools that were new, or in a high growth area may have used this opportunity to grow rapidly. During the COVID years, the rush to Independent schools was probably due to a perception that they offered better home schooling and this has created big opportunities for rapid growth.

What is the current outlook for Independent schools?

The economic news worldwide is indicating we may be coming into some form of recession, and this includes Australia. It is widely spoken that the interest rates and the "cliff" many people are arriving at as they move from fixed to variable interest rates will start to have a serious effect on people's disposable income.

On top of that, we have just had news of the Victorian budget, and the targeting of large Independent Schools with Payroll Tax, and a general further tightening of the Victorian economy.

The exodus to Independent Schools from the Government Schools is probably over, and we may see some reversal of these effects. It will not be sudden, as people do not like to move their children unless absolutely necessary.

The effects are likely to start in the reduction of future enrolments inquiries, and a possible whittling away of what may have been very strong future enrolment lists.

Our view is to not become complacent as you may currently feel that your future enrolments exceed your targets for numbers, but be aware you need to stay strong, or you could reverse the trend fairly quickly.

The Catholic system has seen a slow reduction over a large number of years. They need to be very aware that many schools are now going past a realistic breakeven point, and are not staying competitive with Government schools, let alone the lower fee Independent Schools.

The next set of numbers are the ACARA data (by state and territory) and the particular cautions I like to mention are that some Catholic schools in NSW (mainly) are classed as Independent schools, and many of the Islamic schools are classed as Independent, which can cause strong growth in that sector especially in the new migrant areas.

Individual data by State
New South Wales

NSW	2019	2020	2021	2022	2019-2022	2020-2022	2021-2022
Catholic	**214,324**	**216,876**	**220,553**	**223,543**	**4.30%**	**3.07%**	**1.36%**
Combined	7,934	10,413	12,678	13,514	70.32%	29.78%	6.59%
Primary	119,788	118,618	118,670	119,491	-0.25%	0.74%	0.69%
Secondary	86,473	87,674	89,009	90,330	4.46%	3.03%	1.48%
Special	128	171	195	208	62.50%	21.64%	6.67%
Government	**805,289**	**809,701**	**801,840**	**790,849**	**-1.79%**	**-2.33%**	**-1.37%**
Combined	16,362	16,074	16,179	16,422	0.37%	2.17%	1.50%
Primary	486,284	485,188	478,733	469,716	-3.41%	-3.19%	-1.88%
Secondary	296,906	302,659	301,057	298,682	0.60%	-1.31%	-0.79%
Special	5,737	5,780	5,872	6,029	5.09%	4.31%	2.67%
Independent	**208,618**	**212,718**	**220,405**	**227,226**	**8.92%**	**6.82%**	**3.09%**
Combined	171,960	176,137	185,169	192,241	11.79%	9.14%	3.82%
Primary	8,417	7,912	8,256	7,488	-11.04%	-5.36%	-9.30%
Secondary	22,415	22,483	21,840	22,121	-1.31%	-1.61%	1.29%
Special	5,827	6,187	5,141	5,376	-7.74%	-13.11%	4.58%
Total	**1,228,230**	**1,239,295**	**1,242,798**	**1,241,617**	**1.09%**	**0.19%**	**-0.10%**

NSW has seen a big reduction in Government sector attendance with an actual drop of about 11,000 students just from 2021 to 2022. The Catholic sector has risen strongly, and the Independent sector the most over the three year period.

Victoria

VIC	2019	2020	2021	2022	2019-2022	2020-2022	2021-2022
Catholic	**208,298**	**210,030**	**210,650**	**210,550**	**1.08%**	**0.25%**	**-0.05%**
Combined	12,998	13,228	13,333	13,340	2.63%	0.85%	0.05%
Primary	108,110	107,883	107,046	106,419	-1.56%	-1.36%	-0.59%
Secondary	86,550	88,170	89,504	90,026	4.02%	2.11%	0.58%
Special	640	750	767	766	19.57%	2.13%	-0.16%
Government	**628,789**	**643,081**	**644,230**	**644,598**	**2.51%**	**0.24%**	**0.06%**
Combined	55,550	57,632	59,334	60,450	8.82%	4.89%	1.88%
Primary	351,141	354,240	352,425	350,134	-0.29%	-1.16%	-0.65%
Secondary	206,813	216,233	218,199	218,810	5.80%	1.19%	0.28%
Special	15,285	14,976	14,273	15,204	-0.53%	1.52%	6.53%
Independent	**146,294**	**150,226**	**154,690**	**159,179**	**8.81%**	**5.96%**	**2.90%**
Combined	137,309	140,707	144,917	148,887	8.43%	5.81%	2.74%
Primary	3,888	4,018	4,260	4,274	9.93%	6.37%	0.34%
Secondary	3,310	3,445	3,125	3,125	-5.58%	-9.29%	0.01%
Special	1,787	2,055	2,389	2,893	61.90%	40.73%	21.10%
Total	**983,381**	**1,003,337**	**1,009,570**	**1,014,327**	**3.15%**	**1.10%**	**0.47%**

The Government sector has grown quite well, if still below the average market share. The Catholic sector has suffered badly with a tiny loss between 2021 and 2022. The Independent sector has flown over the 2019 – 2022 period.

Queensland

QLD	2019	2020	2021	2022	2019-2022	2020-2022	2021-2022
Catholic	**148,899**	**153,514**	**155,828**	**157,688**	**5.90%**	**2.72%**	**1.19%**
Combined	38,524	40,456	42,553	44,399	15.25%	9.75%	4.34%
Primary	65,411	65,753	66,318	66,131	1.10%	0.58%	-0.28%
Secondary	43,652	46,029	45,641	45,845	5.02%	-0.40%	0.45%
Special	1,312	1,276	1,316	1,313	0.08%	2.92%	-0.18%
Government	**561,366**	**574,600**	**576,134**	**572,111**	**1.91%**	**-0.43%**	**-0.70%**
Combined	55,875	57,755	58,044	57,695	3.26%	-0.10%	-0.60%
Primary	313,718	312,929	310,406	305,387	-2.66%	-2.41%	-1.62%
Secondary	186,644	198,544	201,679	202,814	8.66%	2.15%	0.56%
Special	5,130	5,373	6,004	6,215	21.17%	15.69%	3.52%
Independent	**124,225**	**130,316**	**136,180**	**141,466**	**13.88%**	**8.56%**	**3.88%**
Combined	112,663	117,094	121,653	125,895	11.74%	7.52%	3.49%
Primary	3,976	4,160	4,365	4,427	11.35%	6.42%	1.43%
Secondary	6,128	6,589	6,877	7,459	21.72%	13.20%	8.46%
Special	1,458	2,473	3,286	3,685	152.81%	49.03%	12.17%
Total	**834,490**	**858,431**	**868,142**	**871,266**	**4.41%**	**1.50%**	**0.36%**

Strong growth across all school sectors of 4.41% over the 2019 – 2022 period, partly due to internal migration within Australia. The Independent sector grew the strongest and the Catholic sector improved its market share.

Western Australia

WA	2019	2020	2021	2022	2019-2022	2020-2022	2021-2022
Catholic	**66,309**	**66,470**	**67,630**	**68,994**	**4.05%**	**3.80%**	**2.02%**
Combined	16,118	16,479	17,233	19,550	21.29%	18.64%	13.45%
Primary	28,995	28,832	29,164	29,213	0.75%	1.32%	0.17%
Secondary	20,832	20,806	20,890	19,904	-4.45%	-4.34%	-4.72%
Special	363	354	343	327	-9.94%	-7.66%	-4.58%
Government	**299,162**	**304,514**	**306,961**	**306,995**	**2.62%**	**0.81%**	**0.01%**
Combined	16,596	16,411	16,212	16,228	-2.21%	-1.11%	0.10%
Primary	177,828	179,108	180,244	180,145	1.30%	0.58%	-0.06%
Secondary	100,143	104,187	105,450	105,452	5.30%	1.21%	0.00%
Special	4,596	4,808	5,055	5,171	12.50%	7.54%	2.28%
Independent	**71,619**	**72,785**	**75,702**	**78,080**	**9.02%**	**7.28%**	**3.14%**
Combined	62,822	63,612	65,885	68,163	8.50%	7.15%	3.46%
Primary	3,703	3,723	3,777	3,680	-0.62%	-1.14%	-2.56%
Secondary	3,180	3,270	3,789	3,962	24.60%	21.16%	4.57%
Special	1,914	2,180	2,251	2,275	18.83%	4.36%	1.05%
Total	**437,090**	**443,769**	**450,293**	**454,069**	**3.88%**	**2.32%**	**0.84%**

Strong growth across all education sectors of 3.88% over the 2019 – 2022 period. The Independent sector grew the most with 9.02%, whilst the Catholic sector picked up market share and the Government sector did not keep up with overall growth.

South Australia

SA	2019	2020	2021	2022	2019-2022	2020-2022	2021-2022
Catholic	**45,141**	**46,077**	**47,929**	**49,621**	**9.92%**	**7.69%**	**3.53%**
Combined	22,122	23,228	25,055	26,348	19.10%	13.43%	5.16%
Primary	16,835	17,364	17,131	17,684	5.05%	1.84%	3.23%
Secondary	5,940	5,210	5,511	5,360	-9.77%	2.86%	-2.75%
Special	244	275	233	229	-6.06%	-16.49%	-1.38%
Government	**176,330**	**176,154**	**173,474**	**171,987**	**-2.46%**	**-2.37%**	**-0.86%**
Combined	25,640	25,808	25,554	27,859	8.65%	7.95%	9.02%
Primary	100,732	99,965	97,495	85,270	-15.35%	-14.70%	-12.54%
Secondary	48,792	49,180	49,216	57,674	18.20%	17.27%	17.19%
Special	1,165	1,201	1,210	1,185	1.66%	-1.39%	-2.07%
Independent	**49,360**	**50,077**	**51,581**	**53,380**	**8.14%**	**6.59%**	**3.49%**
Combined	38,259	38,840	38,886	40,613	6.15%	4.57%	4.44%
Primary	6,984	6,885	7,117	7,020	0.52%	1.97%	-1.37%
Secondary	3,892	4,109	5,305	5,406	38.90%	31.56%	1.91%
Special	225	244	273	340	51.29%	39.51%	24.69%
Total	**270,831**	**272,308**	**272,984**	**274,987**	**1.53%**	**0.98%**	**0.73%**

South Australia had low growth over the three year period, and the Government sector was hit the hardest with a drop of 2.46%. The Catholic sector flourished and exceeded the increase recorded in the Independent sector.

Tasmania

TAS	2019	2020	2021	2022	2019-2022	2020-2022	2021-2022
Catholic	**14,922**	**15,045**	**15,254**	**15,406**	**3.25%**	**2.40%**	**1.00%**
Combined	5,319	5,437	5,547	5,588	5.06%	2.78%	0.74%
Primary	5,411	5,356	5,381	5,396	-0.27%	0.75%	0.28%
Secondary	4,192	4,157	4,210	4,299	2.53%	3.41%	2.09%
Special	0	96	116	124	0.00%	29.17%	6.90%
Government	**58,041**	**57,892**	**56,975**	**57,355**	**-1.18%**	**-0.93%**	**0.67%**
Combined	6,180	6,216	6,220	6,165	-0.25%	-0.83%	-0.88%
Primary	32,666	32,173	31,322	30,673	-6.10%	-4.66%	-2.07%
Secondary	18,907	19,204	19,134	20,208	6.88%	5.23%	5.62%
Special	288	300	299	309	7.54%	3.17%	3.37%
Independent	**9,695**	**10,001**	**10,388**	**10,705**	**10.41%**	**7.03%**	**3.05%**
Combined	8,919	9,080	9,407	9,600	7.63%	5.72%	2.05%
Primary	716	817	804	860	20.11%	5.24%	6.97%
Secondary	27	67	138	203	651.85%	202.99%	47.42%
Special	33	37	39	42	26.51%	14.13%	6.60%
Total	**82,658**	**82,939**	**82,617**	**83,466**	**0.98%**	**0.64%**	**1.03%**

The State's growth was low over the period and the Government sector fell in market share. The main winner was again the Independent sector with a 10.41% increase.

Australian Capital Territory

ACT	2019	2020	2021	2022	2019-2022	2020-2022	2021-2022
Catholic	**14,036**	**14,395**	**14,675**	**14,810**	**5.52%**	**2.88%**	**0.92%**
Primary	8,638	8,749	8,841	8,811	2.00%	0.71%	-0.33%
Secondary	5,397	5,646	5,834	5,999	11.14%	6.24%	2.82%
Government	**44,208**	**45,545**	**46,091**	**46,208**	**4.52%**	**1.46%**	**0.25%**
Combined	8,853	8,907	8,941	8,794	-0.66%	-1.27%	-1.64%
Primary	21,628	22,505	22,828	22,912	5.94%	1.80%	0.37%
Secondary	13,393	13,792	13,965	14,143	5.60%	2.54%	1.27%
Special	335	340	357	360	7.35%	5.83%	0.64%
Independent	**14,105**	**14,179**	**14,487**	**14,836**	**5.18%**	**4.63%**	**2.41%**
Combined	12,379	12,371	12,599	12,885	4.09%	4.16%	2.27%
Primary	303	368	392	425	40.26%	15.49%	8.42%
Secondary	1,383	1,385	1,427	1,444	4.41%	4.24%	1.22%
Special	40	55	69	82	104.75%	48.91%	18.70%
Total	**72,349**	**74,119**	**75,253**	**75,854**	**4.84%**	**2.34%**	**0.80%**

There was strong growth of 4.84 % over the three year period. Maybe due to strong Government spending, the Government sector basically kept up with the overall ACT increase (4.52%), and Catholic and Independent sector only grew by 5% each.

Northern Territory

NT	2019	2020	2021	2022	2019-2022	2020-2022	2021-2022
Catholic	**4,846**	**4,786**	**4,844**	**4,787**	**-1.21%**	**0.02%**	**-1.16%**
Combined	1,699	1,638	1,604	1,570	-7.59%	-4.16%	-2.14%
Primary	1,515	1,475	1,536	1,564	3.26%	6.08%	1.85%
Secondary	1,551	1,606	1,639	1,554	0.21%	-3.25%	-5.19%
Special	81	67	64	99	22.22%	47.32%	54.69%
Government	**29,953**	**30,396**	**30,068**	**29,417**	**-1.79%**	**-3.22%**	**-2.17%**
Combined	7,039	7,299	7,039	6,997	-0.60%	-4.14%	-0.59%
Primary	14,158	13,997	13,938	13,664	-3.49%	-2.38%	-1.97%
Secondary	8,260	8,578	8,530	8,169	-1.10%	-4.77%	-4.22%
Special	496	521	562	587	18.19%	12.57%	4.38%
Independent	**5,864**	**5,603**	**5,616**	**5,864**	**-0.01%**	**4.64%**	**4.41%**
Combined	4,331	4,292	4,324	4,579	5.72%	6.68%	5.89%
Primary	478	295	299	283	-40.79%	-4.07%	-5.35%
Secondary	1,055	1,016	993	1,002	-5.06%	-1.42%	0.87%
Total	**40,663**	**40,786**	**40,528**	**40,068**	**-1.46%**	**-1.76%**	**-1.14%**

Total number of school students decreased by 1.46%, and all sectors of education dropped small amounts, with the Independent sector staying identical to their 2019 numbers whilst the Catholic and Government sectors dropped away slightly.

Individual Schools

The ACARA numbers also give us the ability to look at every individual school in Australia (9,000+).

We have added the data for all of the schools into the Spectrum Analysis Australia Online Mapping Systems.

Here is a sample of data to demonstrate to you what can be shown in our GeoMapping Plus system.

An Independent school in Sydney:

• School Name: XXX
• Website: XXX
• Campus Type: School Single Entity
• School Sector: Independent
• School Type: Combined
• Full Time Equivalent Teaching Staff: 149.3
• Full Time Equivalent Non-Teaching Staff: 82.9
• Total Enrolments: 1573
• Girls Enrolments: 1573
• Boys Enrolments: 0
• Student/Teaching Staff Ratio: 10.5 students per FTE teaching staff

Enrolments			
Year	**Enrolments**	**Change vs prev. year**	**Change vs 2008**
2022 Enrolments	1,573	9.16%	120.31%
2021 Enrolments	1,441	6.5%	101.82%
2020 Enrolments	1,353	6.03%	89.5%
2019 Enrolments	1,276	8.14%	78.71%
2018 Enrolments	1,180	10.18%	65.27%
2017 Enrolments	1,071	5.83%	50%
2016 Enrolments	1,012	9.64%	41.74%
2015 Enrolments	923	5.85%	29.27%
2014 Enrolments	872	8.32%	22.13%
2013 Enrolments	805	7.91%	12.75%
2012 Enrolments	746	-0.27%	4.48%
2011 Enrolments	748	0.54%	4.76%
2010 Enrolments	744	-2.11%	4.2%
2009 Enrolments	760	6.44%	6.44%
2008 Enrolments	714	Not Available	0%

Average Fee	
$ per Student	$22,614

(Source: ACARA data released March 2023)

A small Catholic Primary School in Melbourne:

- School Name: XXX
- Website: XXX
- Campus Type: School Single Entity
- School Sector: Catholic
- School Type: Primary
- Full Time Equivalent Teaching Staff: 17.3
- Full Time Equivalent Non-Teaching Staff: 9.4
- Total Enrolments: 241
- Girls Enrolments: 117
- Boys Enrolments: 124
- Student/Teaching Staff Ratio: 13.9 students per FTE teaching staff

Enrolments			
Year	**Enrolments**	**Change vs prev. year**	**Change vs 2008**
2022 Enrolments	241	-4.74%	-28.7%
2021 Enrolments	253	-5.24%	-25.15%
2020 Enrolments	267	-7.61%	-21.01%
2019 Enrolments	289	2.48%	-14.5%
2018 Enrolments	282	-3.42%	-16.57%
2017 Enrolments	292	-3.95%	-13.61%
2016 Enrolments	304	-0.98%	-10.06%
2015 Enrolments	307	-11.53%	-9.17%
2014 Enrolments	347	-4.67%	2.66%
2013 Enrolments	364	-0.27%	7.69%
2012 Enrolments	365	-2.14%	7.99%
2011 Enrolments	373	3.04%	10.36%
2010 Enrolments	362	-0.55%	7.1%
2009 Enrolments	364	7.69%	7.69%
2008 Enrolments	338	Not Available	0%

Average Fee	
$ per Student	$2,721

(Source: ACARA data released March 2023)

Summary

The ACARA numbers give us a very good look at how schools are tracking by State and Territory, down to individual schools.

If you would like some further assistance, please contact us directly.

[Peter Buckingham BSc GradDip MktMdl CFE FIMC CMC]

Co-Founder and Managing Director

Spectrum Analysis Australia

Suite 6, 407 Canterbury Road, Surrey Hills, Melbourne, Victoria, Australia 3127

+61 3 9830 0077 or +61 411 604 921

peterb@spectrumanalysis.com.au

https://spectrumanalysis.com.au

https://www.linkedin.com/in/peterbuckingham1

Offering Demographics and Mapping for Schools as well as data resources and mapping tools for admissions and enrolments analysis.