

Presentation at the Educate Plus Vic / Tas Summit by Peter Buckingham – MD of Spectrum Analysis

VIC/TAS Chapter Summit
17 & 18 July 2025, Melbourne



SPECTRUM
A N A L Y S I S

Demographics and Future of Enrolments across Melbourne and Single Sex Schools

- By the end of my talk you will know more about:
 - Big picture for Australia's Population Forecasts.
 - What is the growth of Melbourne going to look like?

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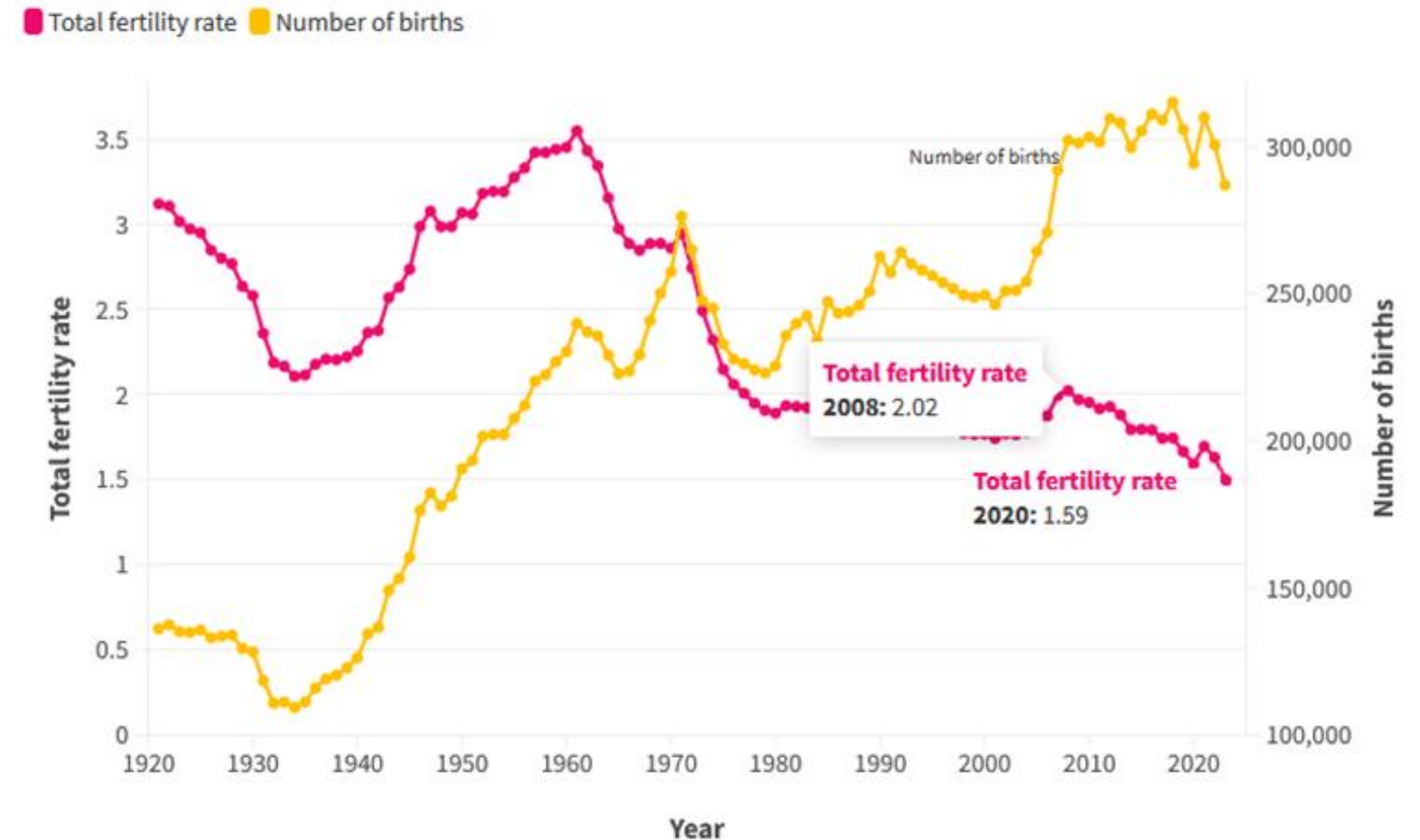
Demographics and Future of Enrolments across Melbourne and Single Sex Schools

- What will affect your Future enrolments?
 - Demographics, Fertility rates and migration
 - Growth or reduction of school age children in broader areas and socio-economics
 - Research undertaken on Trade Areas for schools
 - Changes in people's choices in school types – ACARA data
 - Boys / Girls schools or Co-Ed going forward

Overview of Student Population Growth in Australia

- Australia is now feeling the results of the baby boom initiated by Peter Costello in 2004;
- The Baby boom peaked in 2008 where Total Fertility Rate (TFR) reached 2.02 children per set of parents;
- This means that a 17 year old student now was born in the peak of the baby boom;
- The TFR has dropped ever since, down to 1.5 in 2023. This is the lowest rate ever recorded. The previous lowest rate was 1.59 recorded during the COVID-19 pandemic in 2020;

Number of births and total fertility rate



Victoria



- 2001 – 2007 experienced a consistent increase. This trend also happened across all states and territories. Some states had the increase trend until 2008;
- Total fertility rate 1.89 in 2007 was the highest rate in Victoria since 1979;
- When the Baby boom peaked in 2008 in Australia, Victoria started to see the decline happening.

Overseas migration - Australia – calendar year

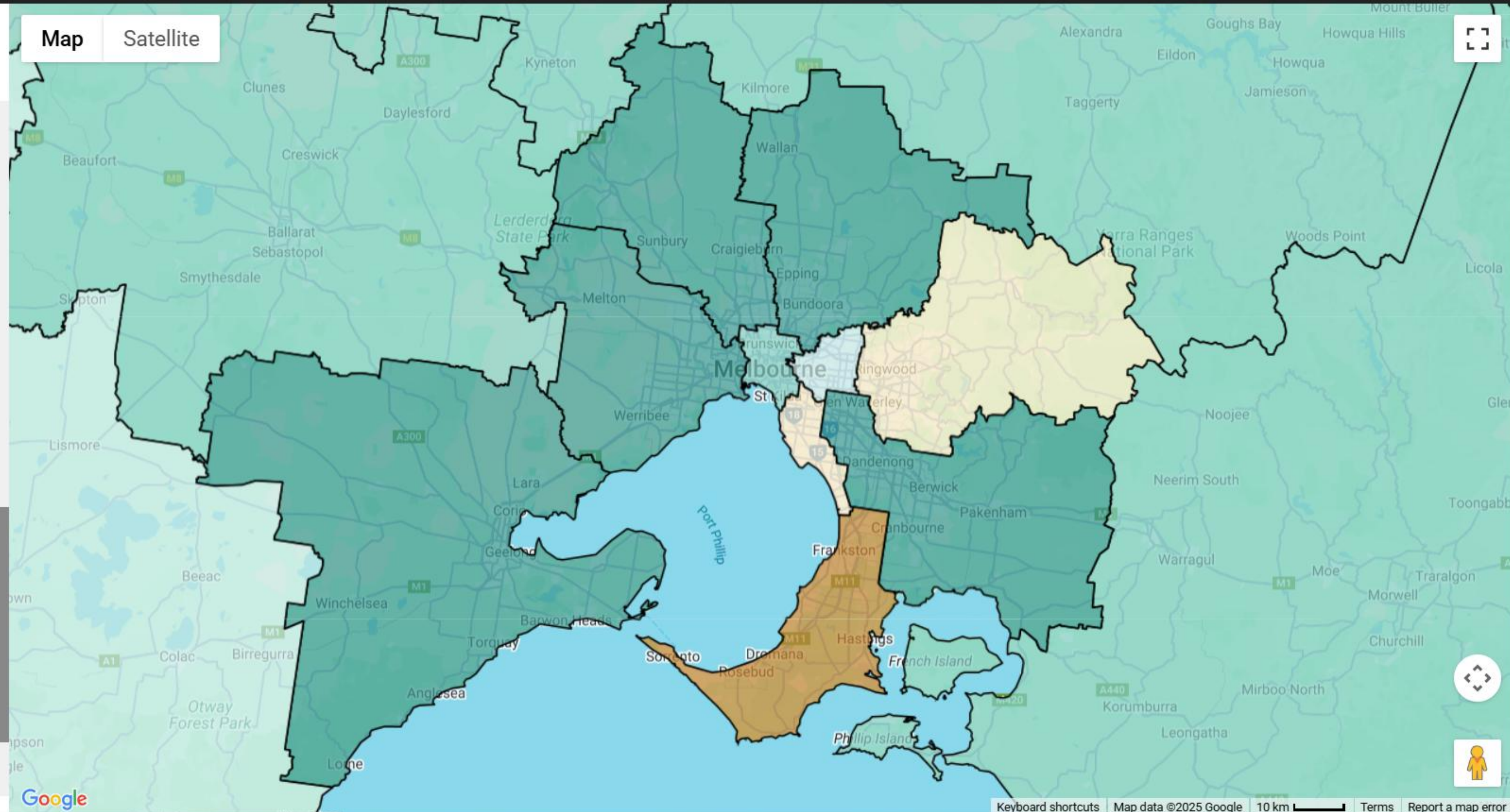
Calendar Year	Migrant arrivals	Migrant departures	Net overseas migration
2014	458,760	276,410	182,350
2015	473,250	286,520	186,730
2016	519,650	275,820	243,830
2017	531,370	289,710	241,660
2018	534,400	282,180	252,220
2019	607,870	360,250	247,620
2020	235,350	240,320	-4,970
2021	216,110	209,240	6,870
2022	653,430	220,280	433,150
2023	740,900	205,910	534,990

Source: Australian Bureau of Statistics, Overseas Migration

Australia's stated position in the 2023 Intergenerational Report is for a long-term net migration of **235,000 persons pa**.

Address Search...

Map Satellite



Projected population increase / decrease by SA4 in Melbourne 2026 - 2032

Sa4 name	Total Population Increase	% Total Population Increase	Population Aged 5-18 Increase/Decrease	% Aged 5-18 Increase/Decrease
Melbourne - Inner (incl CBD)	71,912	10.1%	-27	0.0%
Melbourne - Inner East	22,165	5.5%	-3,460	-5.2%
Melbourne - Inner South	19,705	4.4%	-5,247	-7.0%
Melbourne - North East	69,510	11.5%	5,731	5.4%
Melbourne - North West	46,703	9.9%	3,753	4.2%
Melbourne - Outer East	7,674	1.4%	-5,647	-6.2%
Melbourne - South East	123,042	12.5%	11,595	6.3%
Melbourne - West	169,930	16.9%	24,506	12.5%
Mornington Peninsula	5,237	1.6%	-4,547	-8.8%
Metro	535,878		26,658	

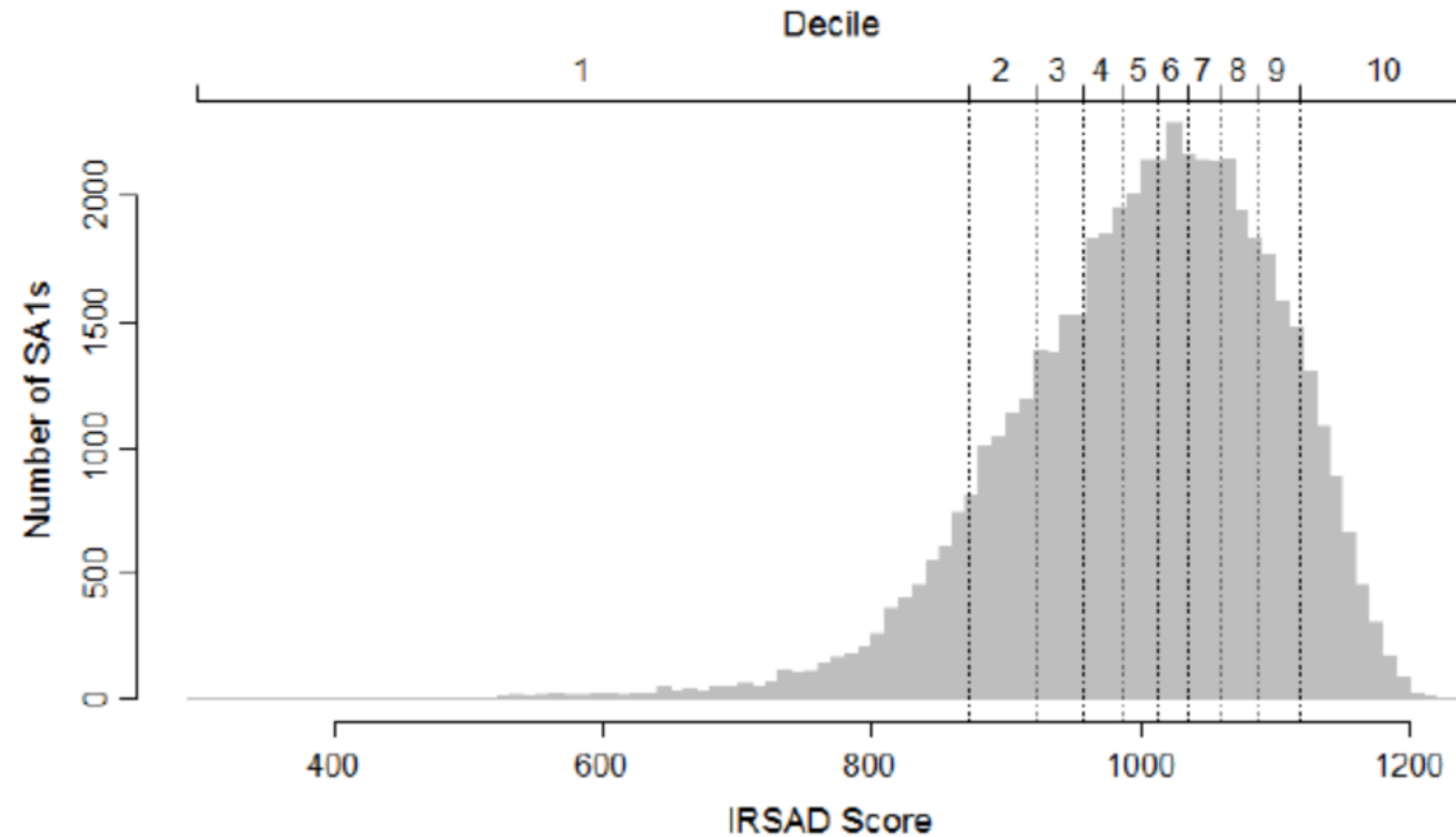
Projected population increase / decrease by SA4 in Regional areas 2026 - 2032

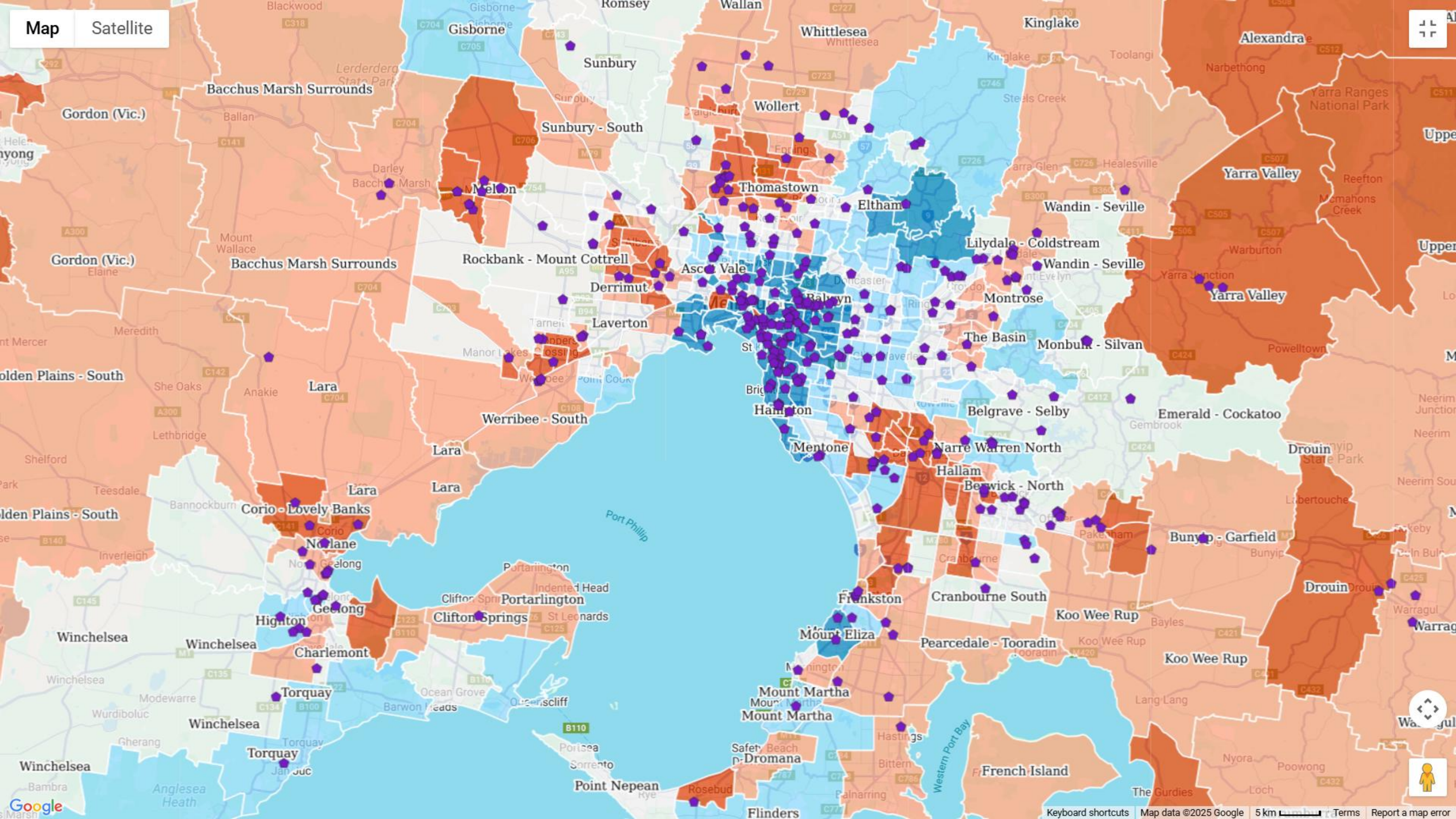
Sa4 name	Total Population Increase	% Total Population Increase	Population Aged 5-18 Increase/Decrease	% Aged 5-18 Increase/Decrease
Ballarat	20,217	10.9%	771	2.6%
Bendigo	19,397	10.9%	1,264	4.4%
Geelong	57,629	15.9%	5,030	8.8%
Hume	17,483	9.0%	715	2.3%
Latrobe - Gippsland	37,249	11.6%	2,940	5.9%
North West	7,516	4.8%	-205	-0.8%
Shepparton	10,917	7.7%	384	1.6%
Warrnambool and South West	5,405	4.2%	-643	-3.2%
Regional	175,813		10,256	

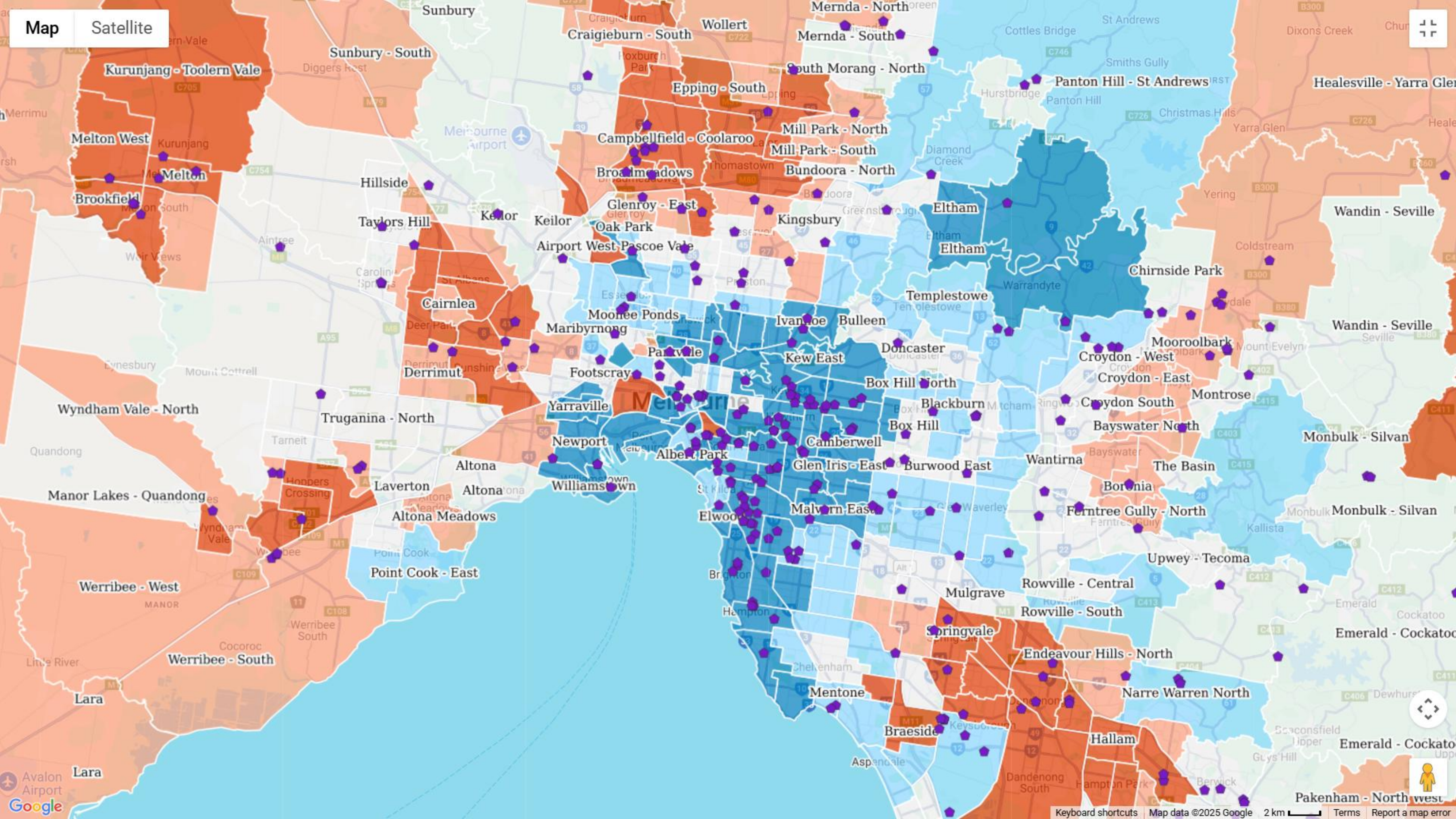
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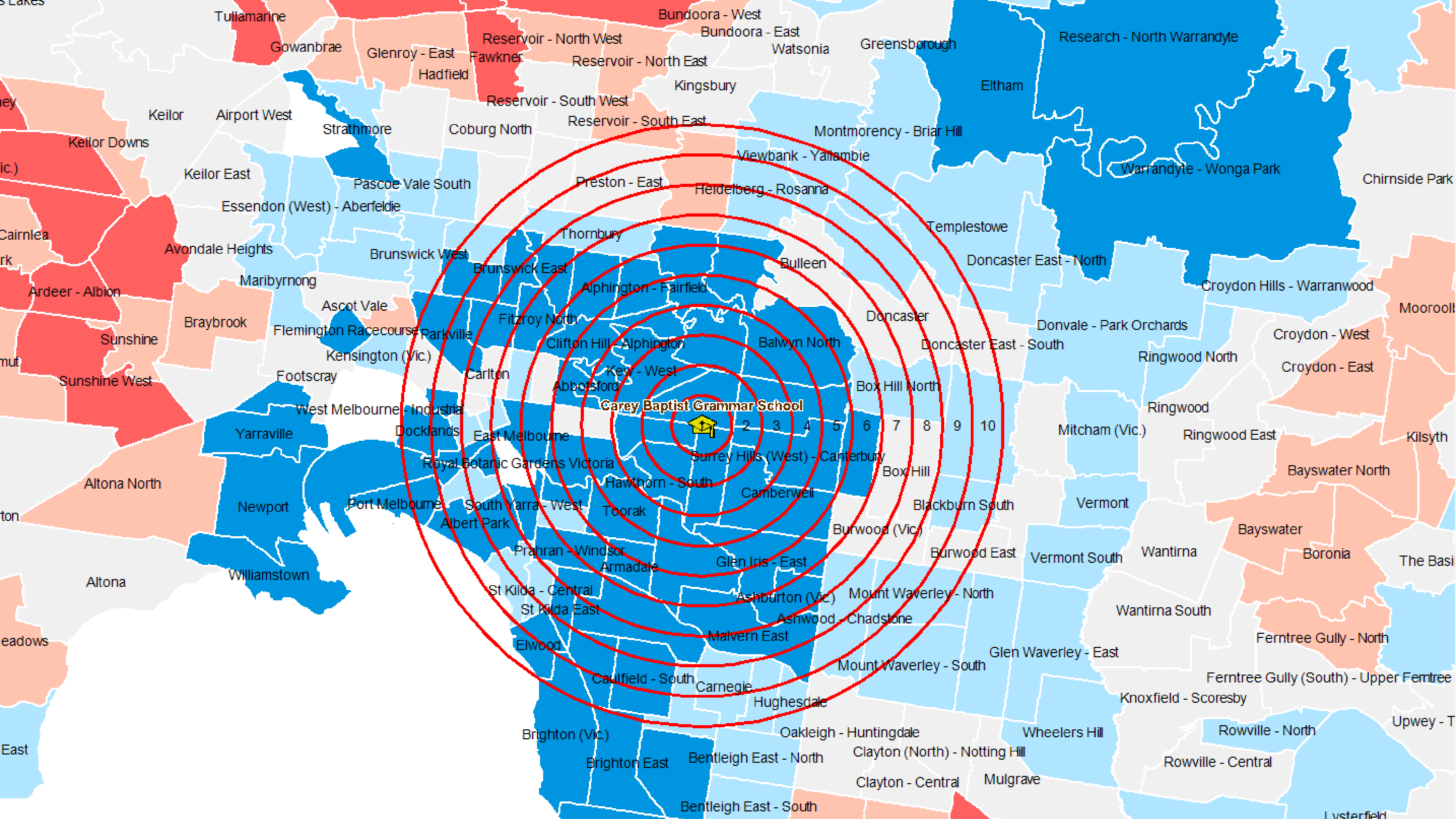
Socio-Economic Index for Areas

- Highest
- 2nd Highest
- Middle
- 2nd Lowest
- Lowest









How far do our students come from?

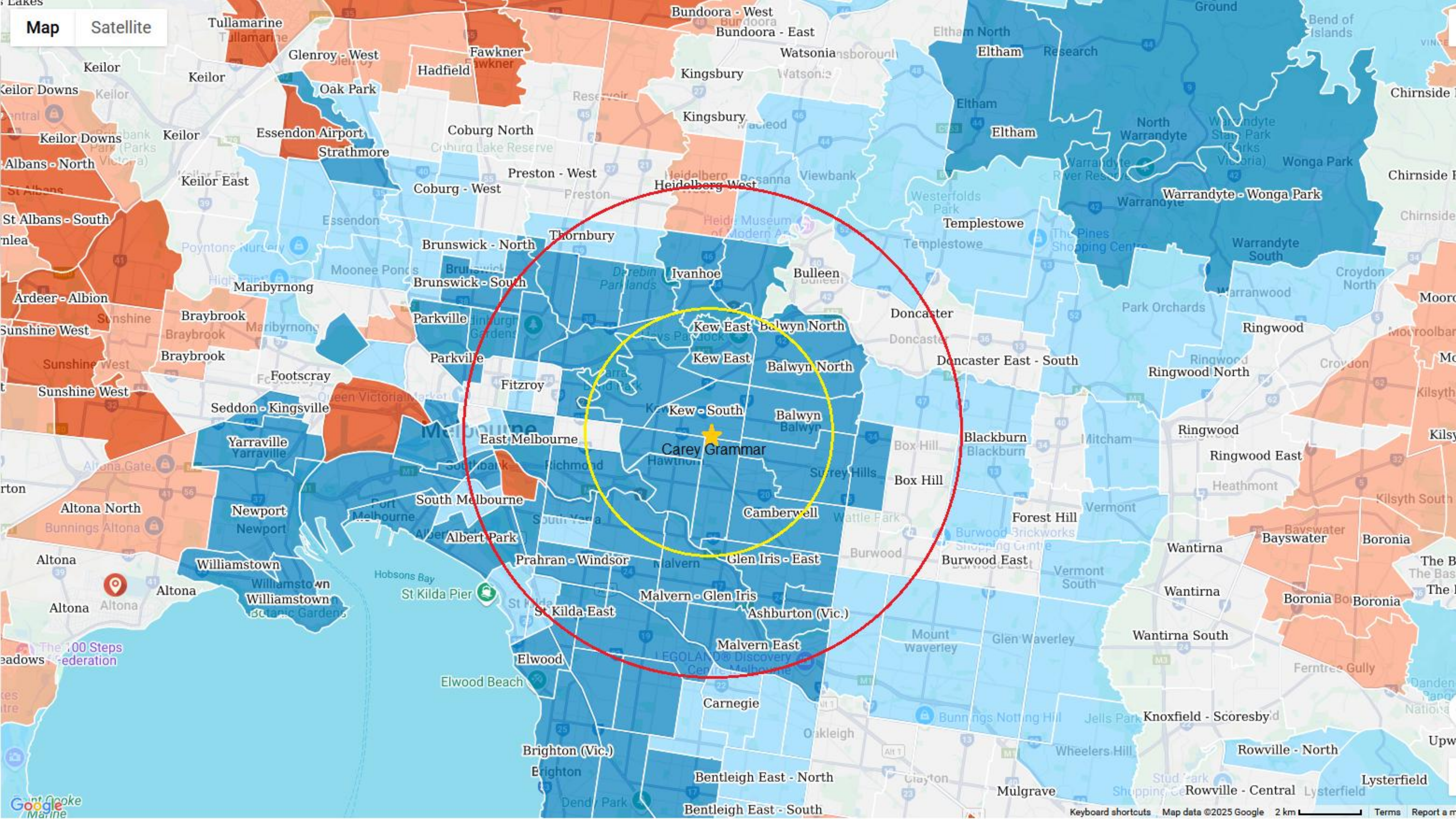
.....Especially in higher socio-economic areas.

Research - Spectrum has undertaken using 16 campuses and over 13,000 students in the **top 20% Socio-Economic areas of Inner Melbourne.**

0	1km	2km	3km	4km	5km	6km	7km	8km	9km	10km	> 10 km
	9.3%	23.8%	37.3%	50.2%	62.5%	71.4%	77.7%	82.0%	85.5%	88.1%	11.9%

Example - Imaginary school of 1,000 students

Distance from school	0 - 1km	1 - 2km	2 - 3km	3 - 4 km	4 - 5km	5 - 6km	6 - 7km	7 - 8km	8 - 9km	9 - 10km	10+ km	Total
Number of students	93	144	135	129	123	90	63	43	35	26	119	1,000
Area of ring	3.14	6.28	9.42	12.57	15.71	18.85	21.99	25.13	28.27	31.42		
Students / sq km	29.7	23.0	14.3	10.3	7.8	4.8	2.9	1.7	1.2	0.8	< .8	



How far do our students come from?

Research - Spectrum has undertaken using 16 campuses and over 13,000 students in Middle and Outer Melbourne suburbs.

0	1km	2km	3km	4km	5km	6km	7km	8km	9km	10km	> 10 km
	7.7%	16.5%	27.6%	37.8%	47.3%	53.3%	58.9%	64.9%	71.3%	76.4%	23.6%

Example - Imaginary school of 1,000 students

Distance from school	0 - 1km	1 - 2km	2 - 3km	3 - 4 km	4 - 5km	5 - 6km	6 - 7km	7 - 8km	8 - 9km	9 - 10km	10+ km	Total
Number of students	77	88	111	102	96	60	55	61	64	51	236	1,000
Area of ring	3.14	6.28	9.42	12.57	15.71	18.85	21.99	25.13	28.27	31.42		
Students / sq km	24.4	14.1	11.8	8.1	6.1	3.2	2.5	2.4	2.3	1.6	< 1.6	

Legend

Instructions

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Demographics Data - Census 2021 (SA2)

Single symbol

Demographics Data - Census 2021 (SA3)

Single symbol

Students to Primary/Secondary School Change

Highest

2nd Highest

Middle

2nd Lowest

Lowest

Australian Catholic Diocese

Single symbol

Population growth

Highest

2nd Highest

Middle

2nd Lowest

Lowest

Population growth

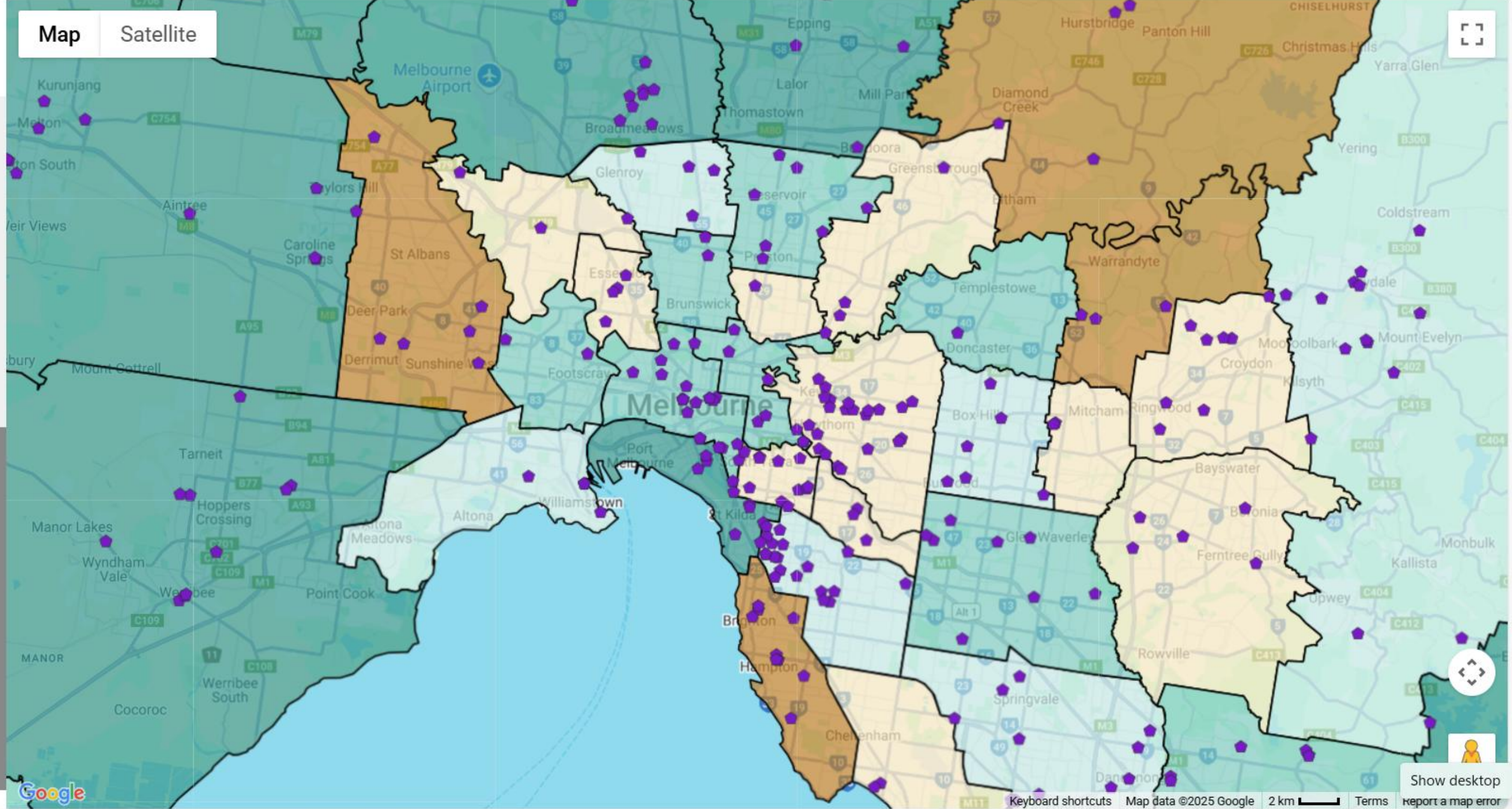
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Layers

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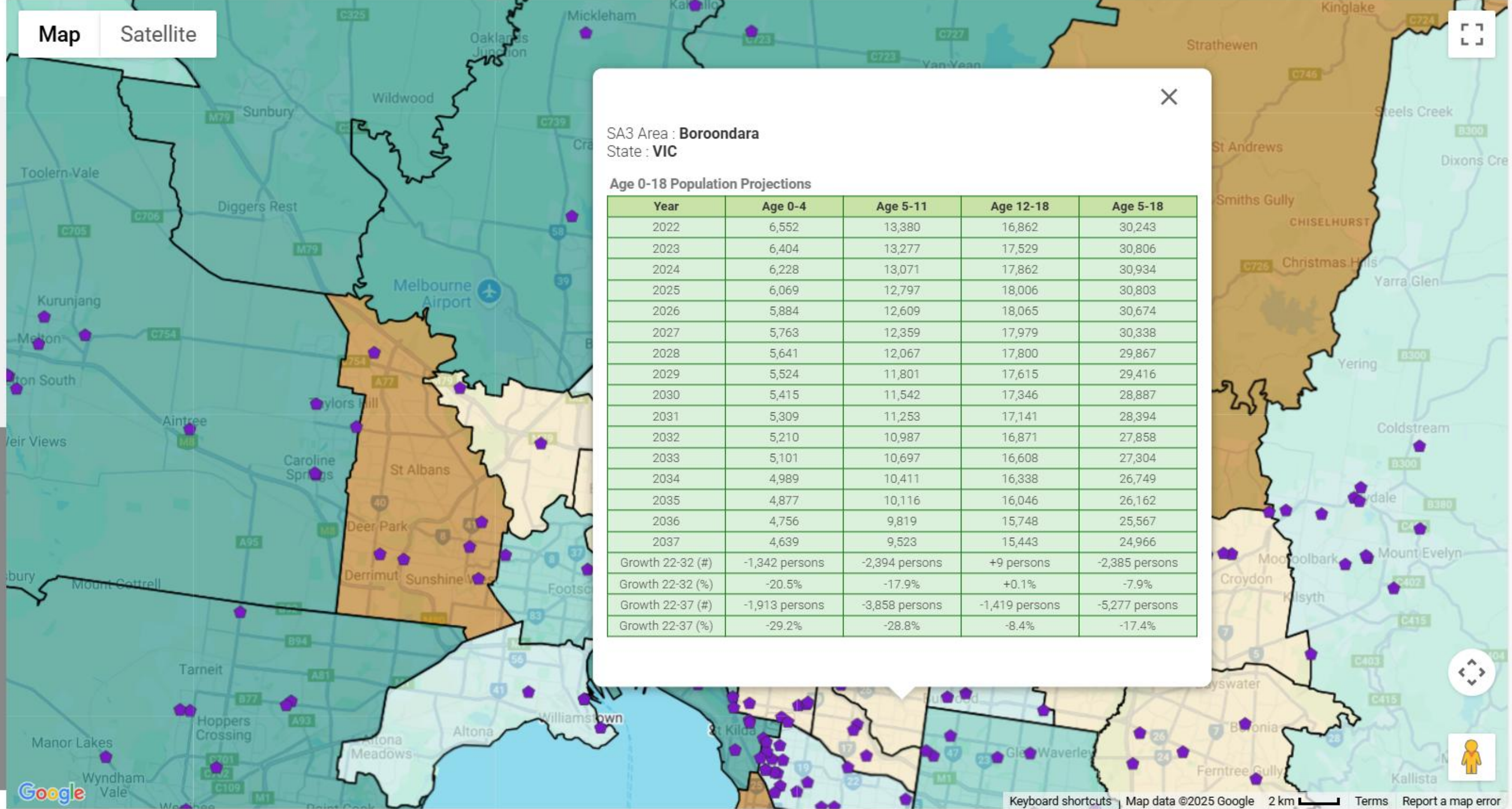
Highest

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Middle

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Lowest



Log out

Satellite

Lowest

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Demographics Data - Census 2021 (SA3)

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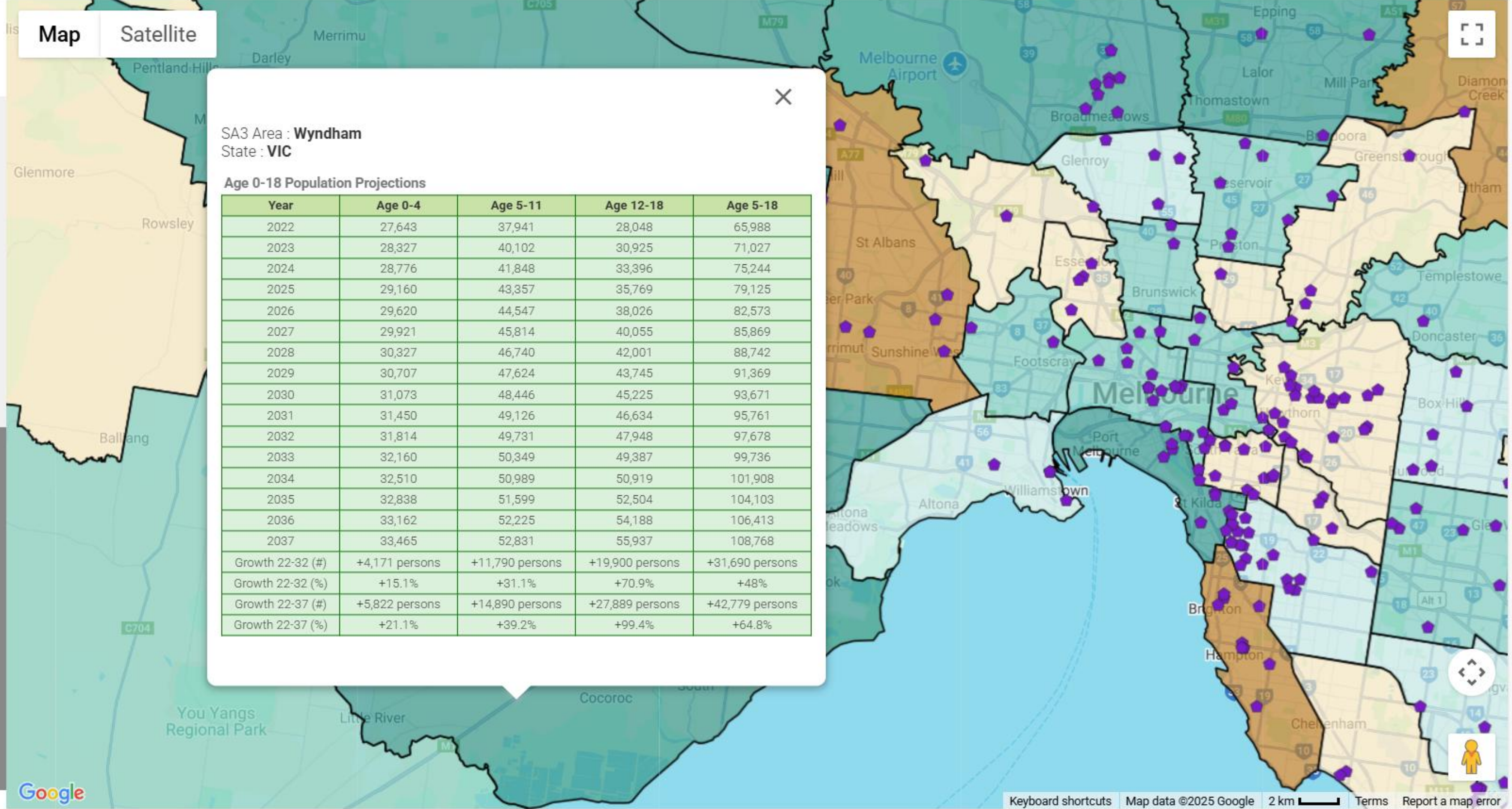
Highest

2nd Highest

Middle

2nd Lowest

Lowest



ACARA data

	2008	2008	2013	2013	2020	2020	2024	2024	2008-2024 Increase
Catholic	644,035	18.9%	695,711	19.1%	727,666	18.1%	768,352	18.5%	19.3%
Government	2,252,349	65.9%	2,375,811	65.3%	2,643,597	65.8%	2,632,284	63.5%	16.9%
Independent	519,578	15.2%	569,171	15.6%	647,214	16.1%	744,961	18.0%	43.4%
Grand Total	3,415,961	100.0%	3,640,692	100.0%	4,018,477	100.0%	4,145,597	100.0%	21.4%

ACARA data

	2008	2013	2020	2024	2008-2024
Catholic	18.9%	19.1%	18.1%	18.5%	19.3%
Government	65.9%	65.3%	65.8%	63.5%	16.9%
Independent	15.2%	15.6%	16.1%	18.0%	43.4%
Grand Total	100.0%	100.0%	100.0%	100.0%	21.4%

Victoria's growth

	Full Time Equivalent Enrolments								
VIC	2020	2021	2022	2023	2024	2020-2024	2021-2024	2022-2024	2023-2024
Catholic	210,581	210,650	210,550	212,493	215,492	2.33%	2.30%	2.35%	1.41%
Combined	13,228	13,333	13,340	13,456	13,629	3.04%	2.22%	2.17%	1.29%
Primary	107,932	107,046	106,419	106,971	107,779	-0.14%	0.68%	1.28%	0.75%
Secondary	88,672	89,481	89,998	91,081	92,639	4.47%	3.53%	2.93%	1.71%
Special	750	790	794	984	1,444	92.61%	82.81%	81.93%	46.69%
Government	643,115	644,238	644,598	655,653	662,242	2.97%	2.79%	2.74%	1.00%
Combined	58,000	59,687	60,815	62,224	61,752	6.47%	3.46%	1.54%	-0.76%
Primary	354,142	352,301	349,993	355,153	357,158	0.85%	1.38%	2.05%	0.56%
Secondary	215,996	217,978	218,586	222,606	227,050	5.12%	4.16%	3.87%	2.00%
Special	14,976	14,273	15,204	15,670	16,282	8.72%	14.08%	7.09%	3.91%
Independent	151,255	154,690	159,179	166,047	172,896	14.31%	11.77%	8.62%	4.12%
Combined	141,165	144,917	148,887	155,337	161,049	14.09%	11.13%	8.17%	3.68%
Primary	4,018	4,260	4,274	3,898	4,149	3.26%	-2.60%	-2.93%	6.44%
Secondary	4,016	3,125	3,125	3,352	3,569	-11.14%	14.21%	14.20%	6.47%
Special	2,055	2,389	2,893	3,460	4,130	100.92%	72.89%	42.77%	19.36%
Grand Total	1,004,951	1,009,578	1,014,327	1,034,193	1,050,629	4.55%	4.07%	3.58%	1.59%

Acara data 2024 (released March 2025)

Can this continue?

How times have changed - Girl's school issue

Back in the last century, (when I was at school) there were 20 APS and AGS schools, all exclusively boys’ schools.

- 12 of these schools have now become Co-Ed
- Carey, Penleigh & Essendon, Wesley, Caulfield, Ivanhoe, Yarra Valley, The Geelong College, Geelong Grammar, Assumption, Haileybury, Mentone & Peninsula.
- 8 are still Boys schools – Camberwell, Scotch, Melbourne Grammar (small number of girls), St Kevins, Brighton, Trinity, Marcellin & Xavier.

Year	Boys Schools	Co - Ed schools		
1970	20		0	
2024	8		12	
	Boys	Girls	Boys	Total
2008	10,363	9,175	14,352	23,527
2024	11,099	13,448	15,559	29,007
	7.10%	46.6%	8.4%	23.29%
		Note - 1 school now has 4 Melbourne campuses and 4 schools have 2 campuses		

How times have changed - Girl's school issue



Creating the
future together

Calendar Year	2010
School Sector	Independent

Count of Total Enrolments			
State / Terr	Boys	Girls	Co-Ed
ACT	17.6%	5.9%	76.5%
NSW	9.0%	8.2%	82.9%
NT	0.0%	0.0%	100.0%
QLD	5.6%	6.2%	88.2%
SA	3.1%	9.3%	87.6%
TAS	3.1%	6.3%	90.6%
VIC	4.7%	8.0%	87.3%
WA	3.6%	5.7%	90.7%
Grand Total	6.1%	7.3%	86.6%

Calendar Year	2020
School Sector	Independent

Count of Total Enrolments			
State / Terr	Boys	Girls	Co-Ed
ACT	10.5%	5.3%	84.2%
NSW	6.0%	7.5%	86.5%
NT	0.0%	0.0%	100.0%
QLD	4.5%	4.5%	91.0%
SA	1.9%	3.8%	94.3%
TAS	2.9%	5.7%	91.4%
VIC	3.7%	8.2%	88.1%
WA	2.6%	5.2%	92.2%
Grand Total	4.4%	6.2%	89.4%

Calendar Year	2024
School Sector	Independent

Count of Total Enrolments			
State / Terr	Boys	Girls	Co-Ed
ACT	11.1%	5.6%	83.3%
NSW	6.1%	7.2%	86.7%
NT	0.0%	0.0%	100.0%
QLD	3.8%	4.7%	91.5%
SA	1.9%	4.7%	93.5%
TAS	2.9%	5.9%	91.2%
VIC	3.9%	7.8%	88.3%
WA	1.9%	5.7%	92.4%
Grand Total	4.2%	6.2%	89.6%

Girl's school issue



- All 12 Co-Ed Schools now have between 40% and 49% girls
- The only school I know that went from Girls to Co-Ed is Kilvington
 - Their numbers have increased from 418 in 2008 to 742 in 2020 and 759 in 2024. They now have 52% boys and 48% girls.

Comparative parcel of Girls schools (ACARA data)

- Camberwell Girls, Fintona, PLC, Strathcona, Ruyton, Genazzano, MLC, Loreto Mandeville Hall, Lauriston, Korowa, Mentone Girls, Ivanhoe Girls. Siena, St Catherines. Melbourne Girls

Year	Students	% Changes
2008	13,156	
2020	14,133	
2024	14,113	
2008 - 2020		7.4%
2008 - 2024		7.3%
2020 - 2024		-0.1%

- Demographics are changing across Australia
- Whilst I have addressed Melbourne (Metro) and Regional (incl Geelong) here, we have data for ALL areas Australia wide & Tasmania.
- I believe we have gone through a VERY good time / set of circumstances for Independent schools in the last 5 years, but can that continue?
- Use data to make better business decisions.

Presenter Details



- Demographic Analysis and mapping for schools
- Peter Buckingham
- Managing Director
- peterb@spectrumanalysis.com.au
- 0411 604921
- www.spectrumanalysis.com.au





Thank You!