

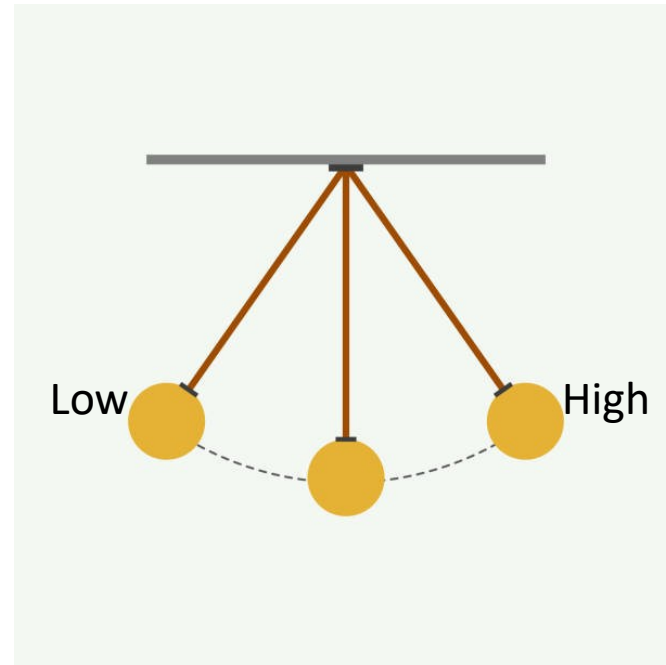
Demographic issues facing schools today

Making data-based decisions for the development of your school



By Peter Buckingham
Co-Founder and Managing Director
Spectrum Analysis Australia

The Pendulum keeps moving - which way will it swing?



My view is we are currently in a phase of **higher** than average enrolments in Independent schools

My view at present it is very much on the high side, and the current climate will be causing a swing back to the middle or even the lower side in terms of total enrolment numbers in independent schools.

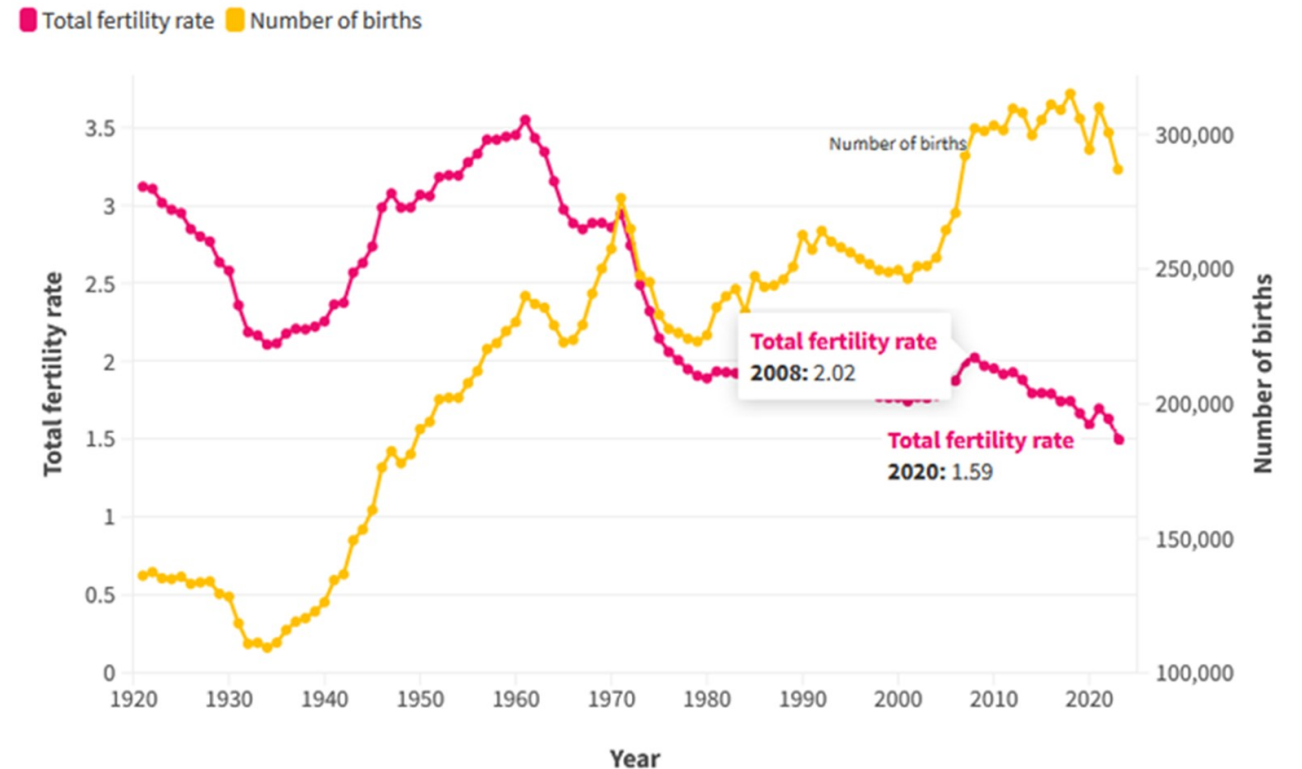
4 major issues affecting the pendulum swing

- Births – numbers of children and which way this is heading over large areas.
- Where they are living and socio economics.
- Appetite of the population to spend on education – affordability?
- Desire for single sex or co-ed schools

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



Overseas migration – past and future

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.**

City by City outlook – future student growth

In all major cities there WILL be areas of growth and areas of reduction.

High Growth is normally the outer areas , lower socio economic and where new housing is being built and migrants and first home buyers are moving into these areas.

Low growth (or negative growth areas) are currently the higher socio economic area across our cities – where most of the large independent schools are located.

Growth Areas Across Melbourne

Reset Layers

Zoom Out

Legend

Layers

Instructions

2021 (SA4)

■ Highest

■ 2nd Highest

■ Middle

■ 2nd Lowest

■ Lowest

Population growth

■ Highest

■ 2nd Highest

■ Middle

■ 2nd Lowest

■ Lowest

Population growth

■ Highest

■ 2nd Highest

■ Middle

■ 2nd Lowest

■ Lowest

Population growth

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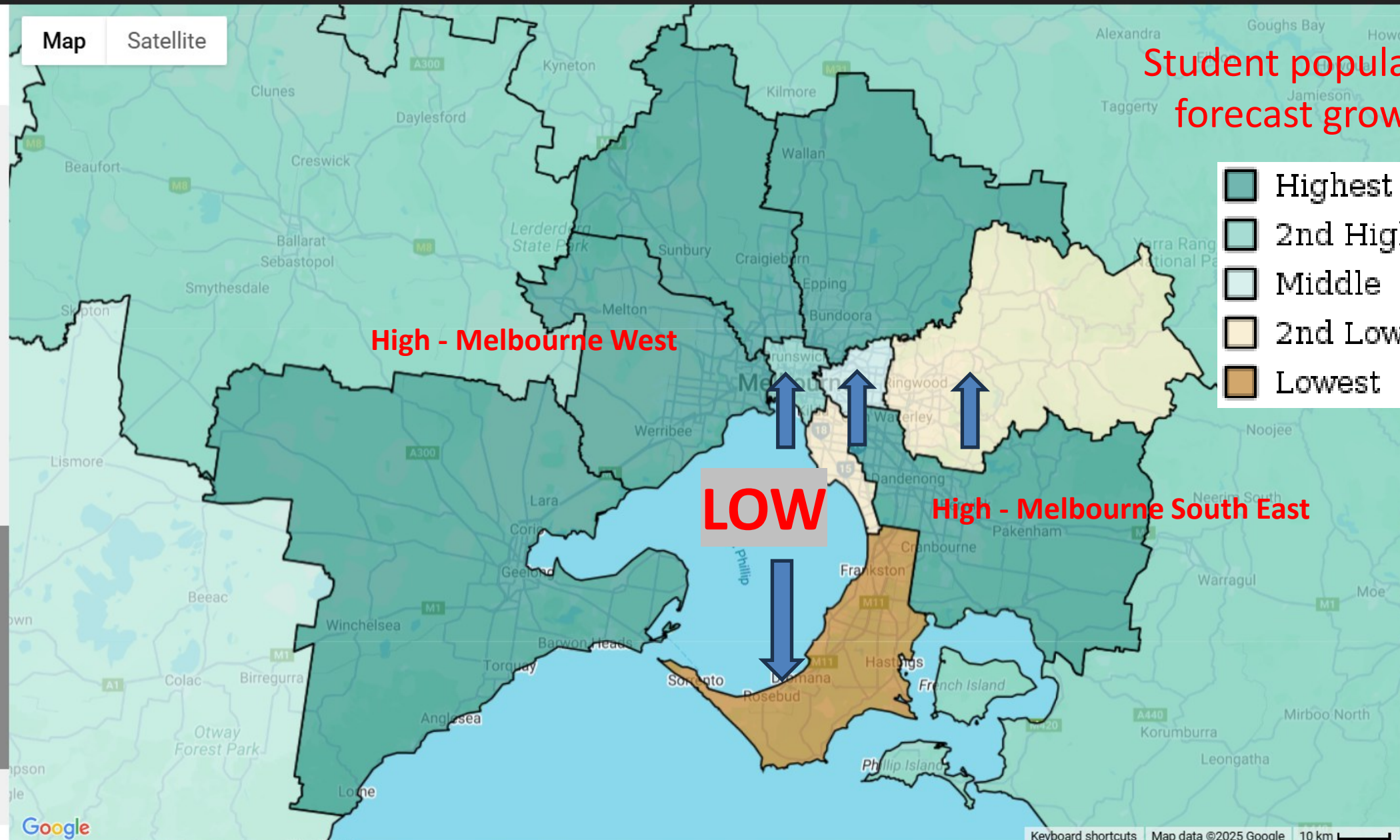
■ Middle

■ 2nd Lowest

■ Lowest

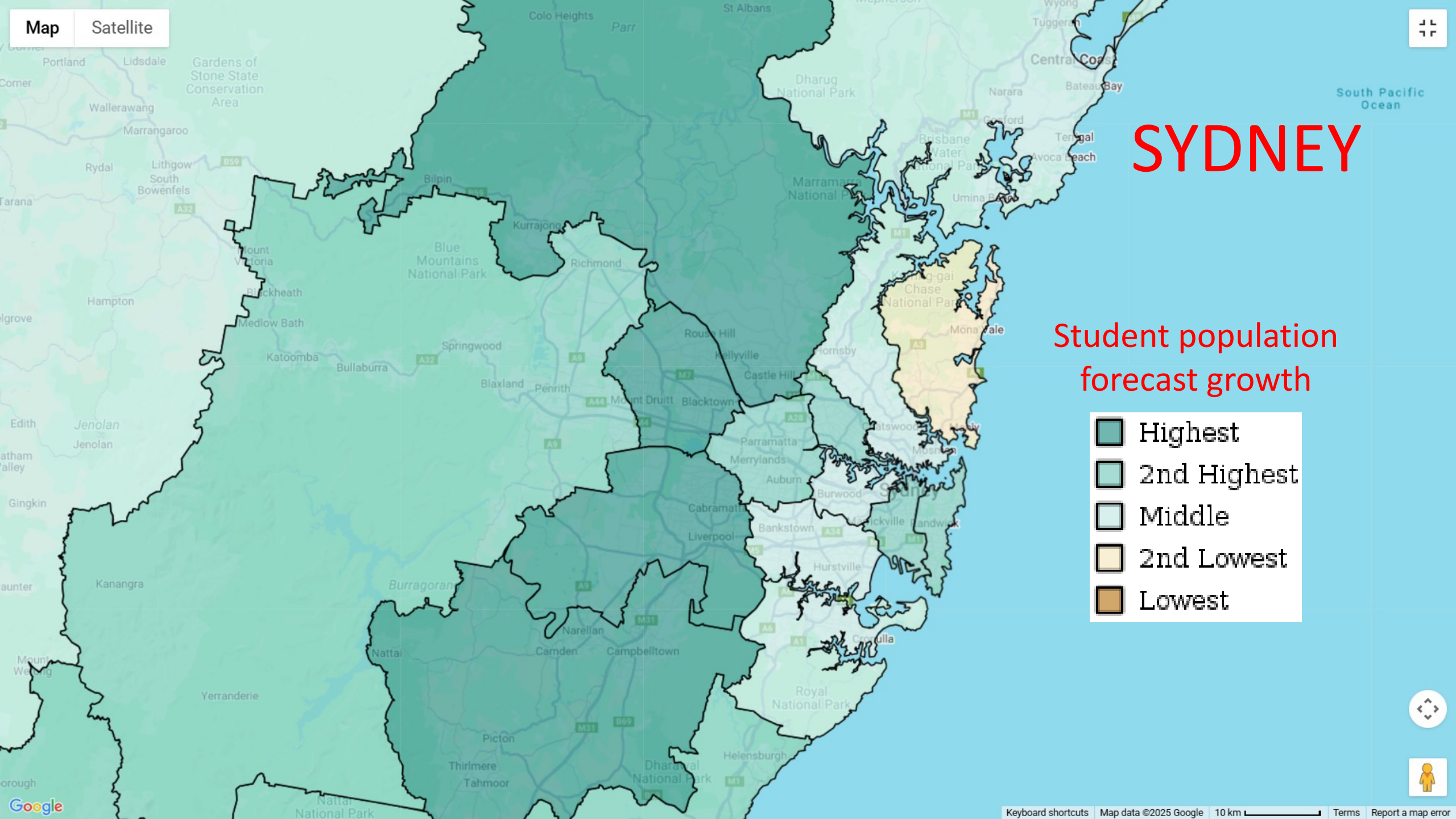
Students to Primary/Secondary School Change

■ Highest



Example - Population projections increase / decrease 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	



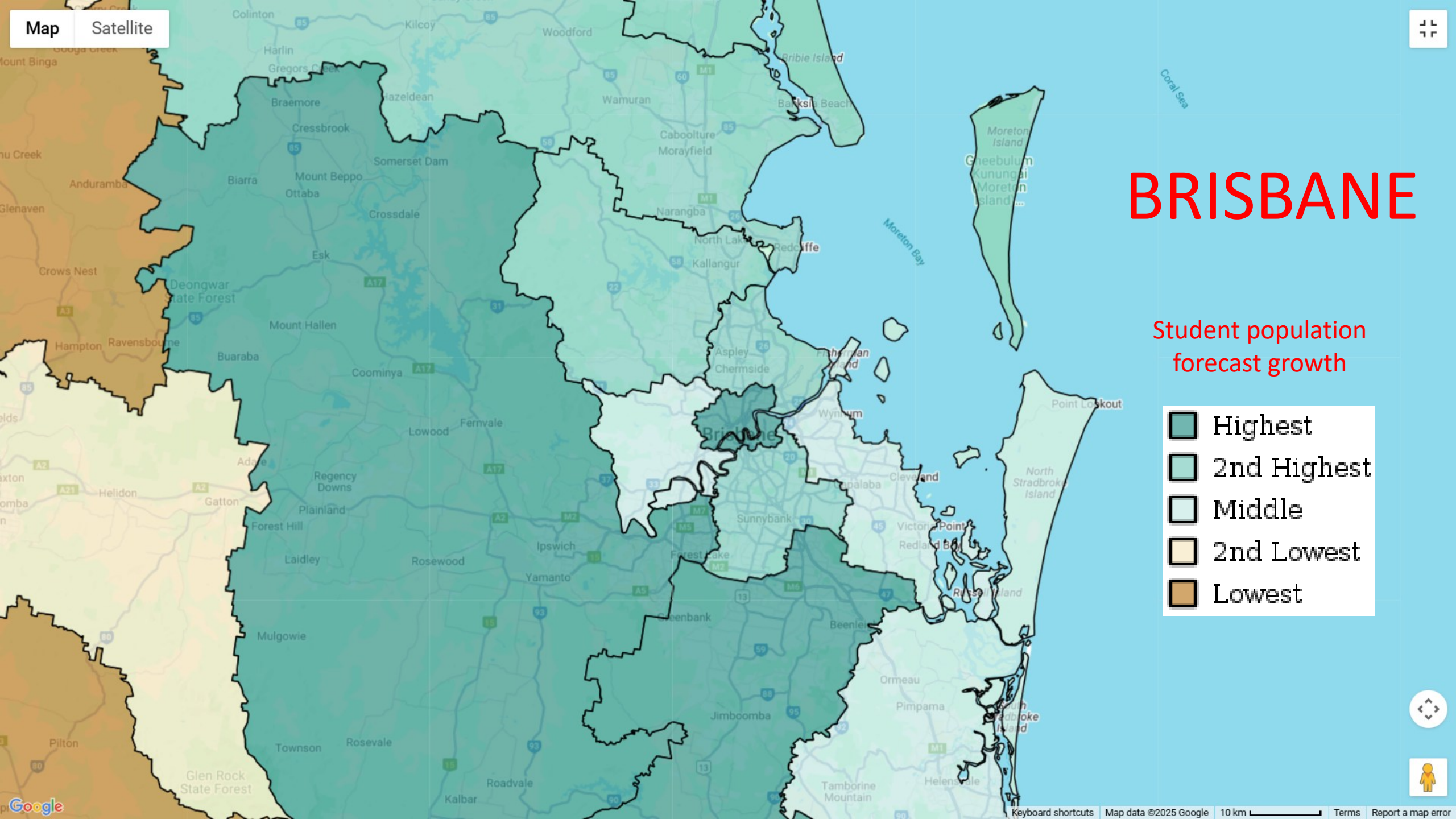
SYDNEY

Student population
forecast growth



Map

Satellite



BRISBANE

Student population
forecast growth

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



Map

Satellite

PERTH

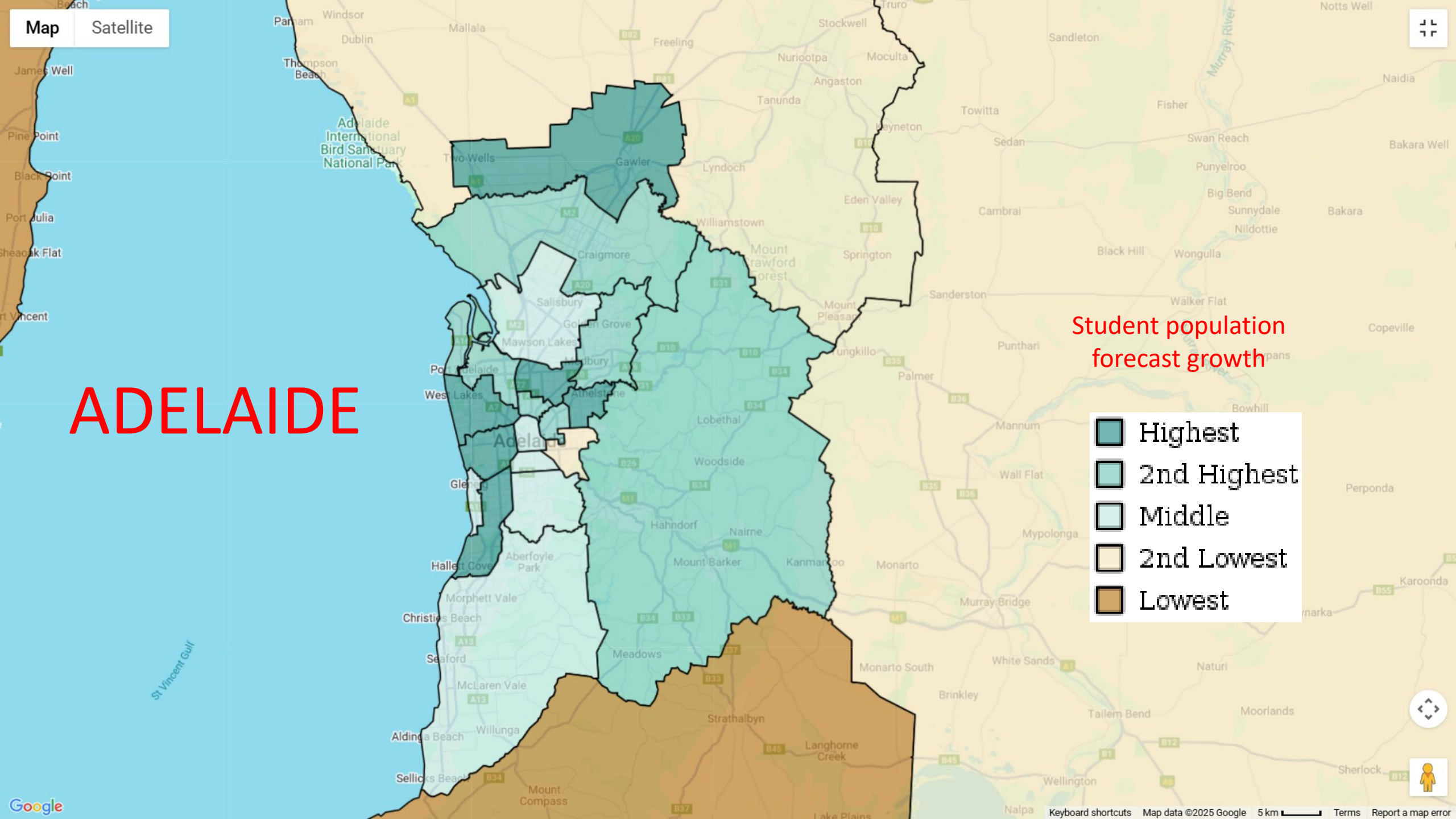
Student population
forecast growth



Map Satellite

ADELAIDE

Student population
forecast growth



Examples of areas – future student growth

In all major cities there WILL be areas of growth and areas of reduction.

Have a look at the examples below and see what they will be Experiencing.

We can show these numbers for anywhere in Australia.

Legend

Layers

Instructions

Single symbol

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

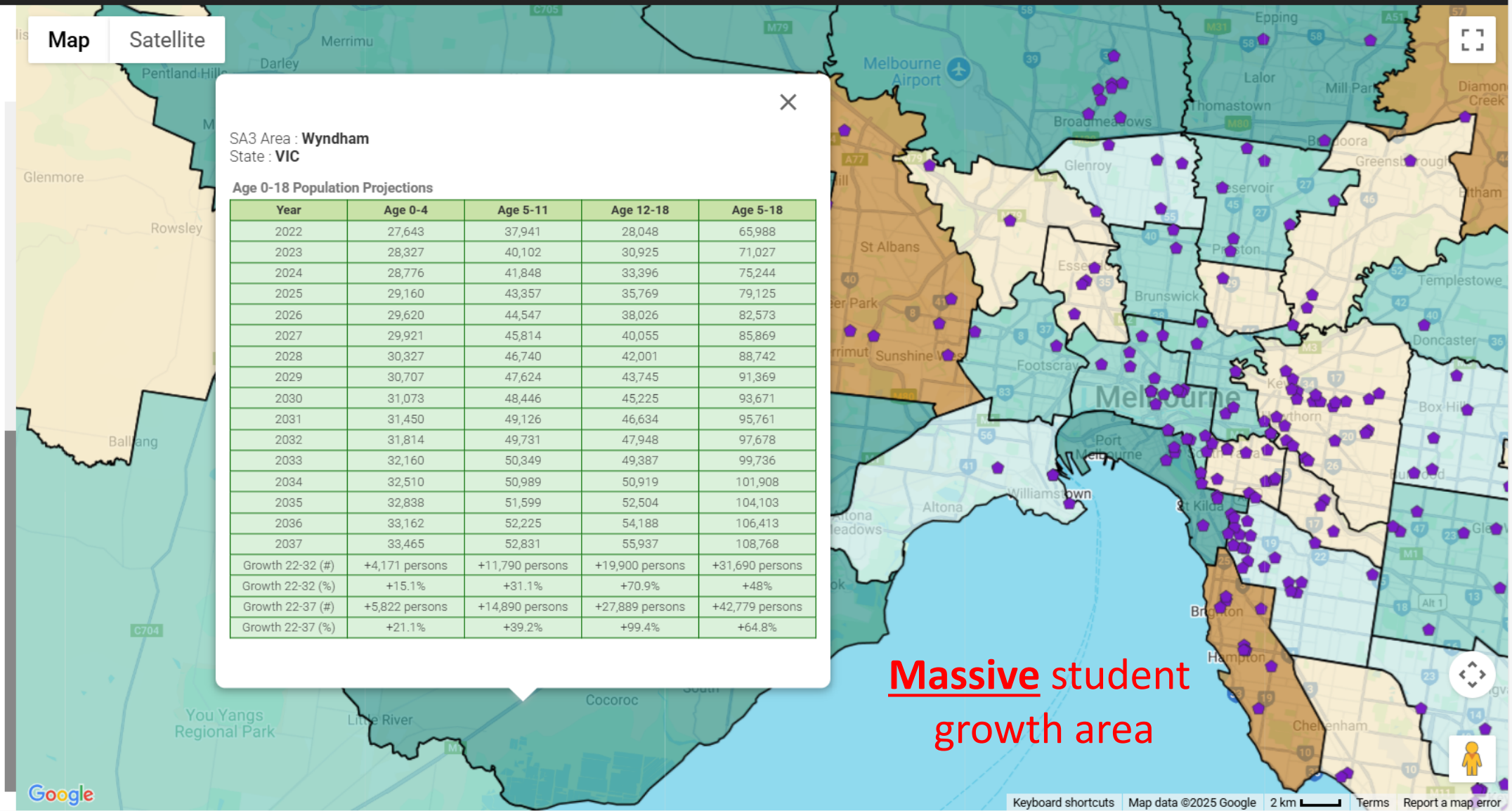
Highest

2nd Highest

Middle

2nd Lowest

Lowest



Legend

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Demographics Data - Census 2021 (SA2)

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Demographics Data - Census 2021 (SA3)

Single symbol

Students to Primary/Secondary School Change

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2nd Lowest

Lowest

Australian Catholic Diocese

Single symbol

Population growth

Highest

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Lowest

Population growth

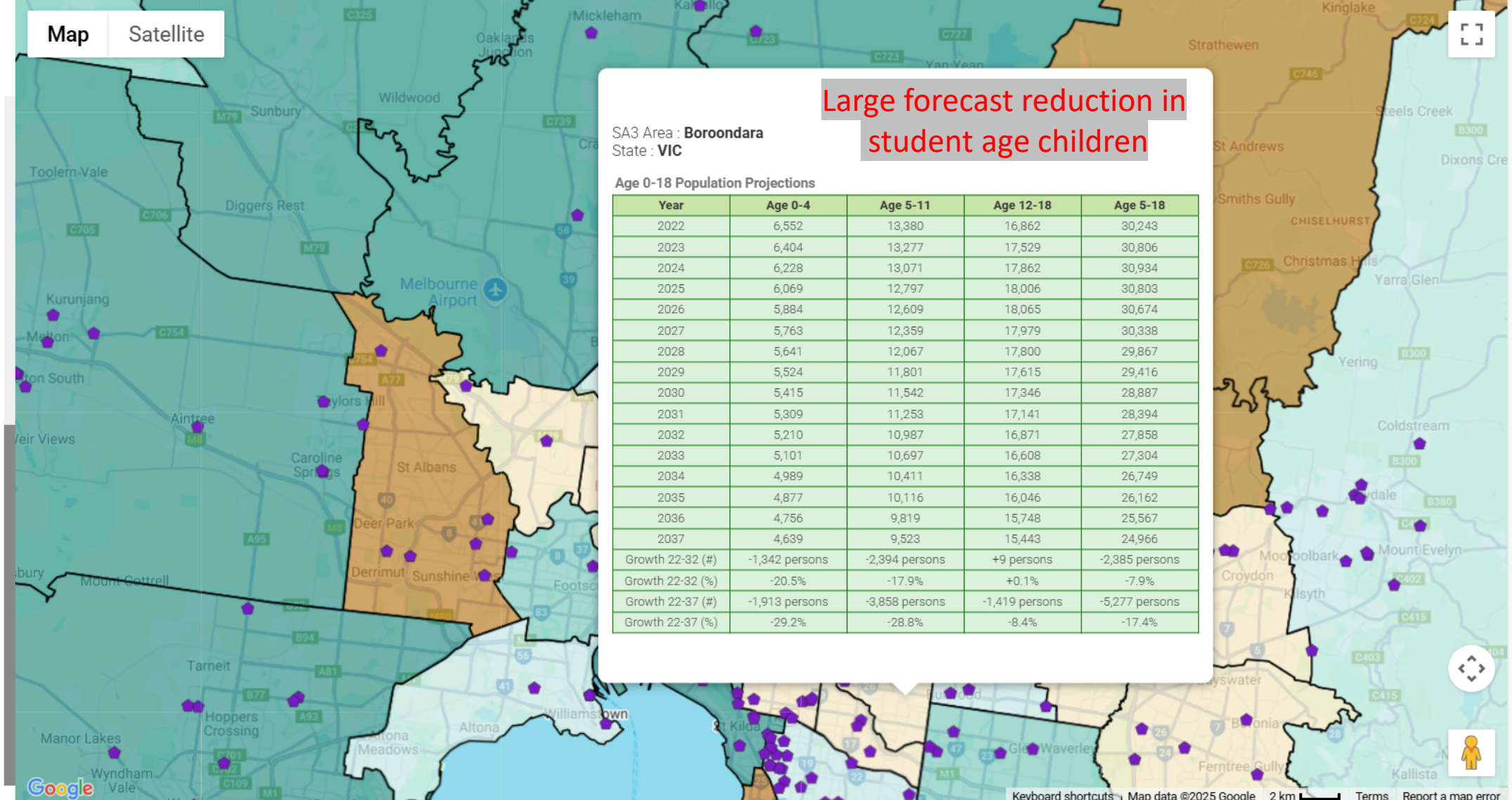
Highest

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Middle

2nd Lowest

Lowest



Massive student growth area

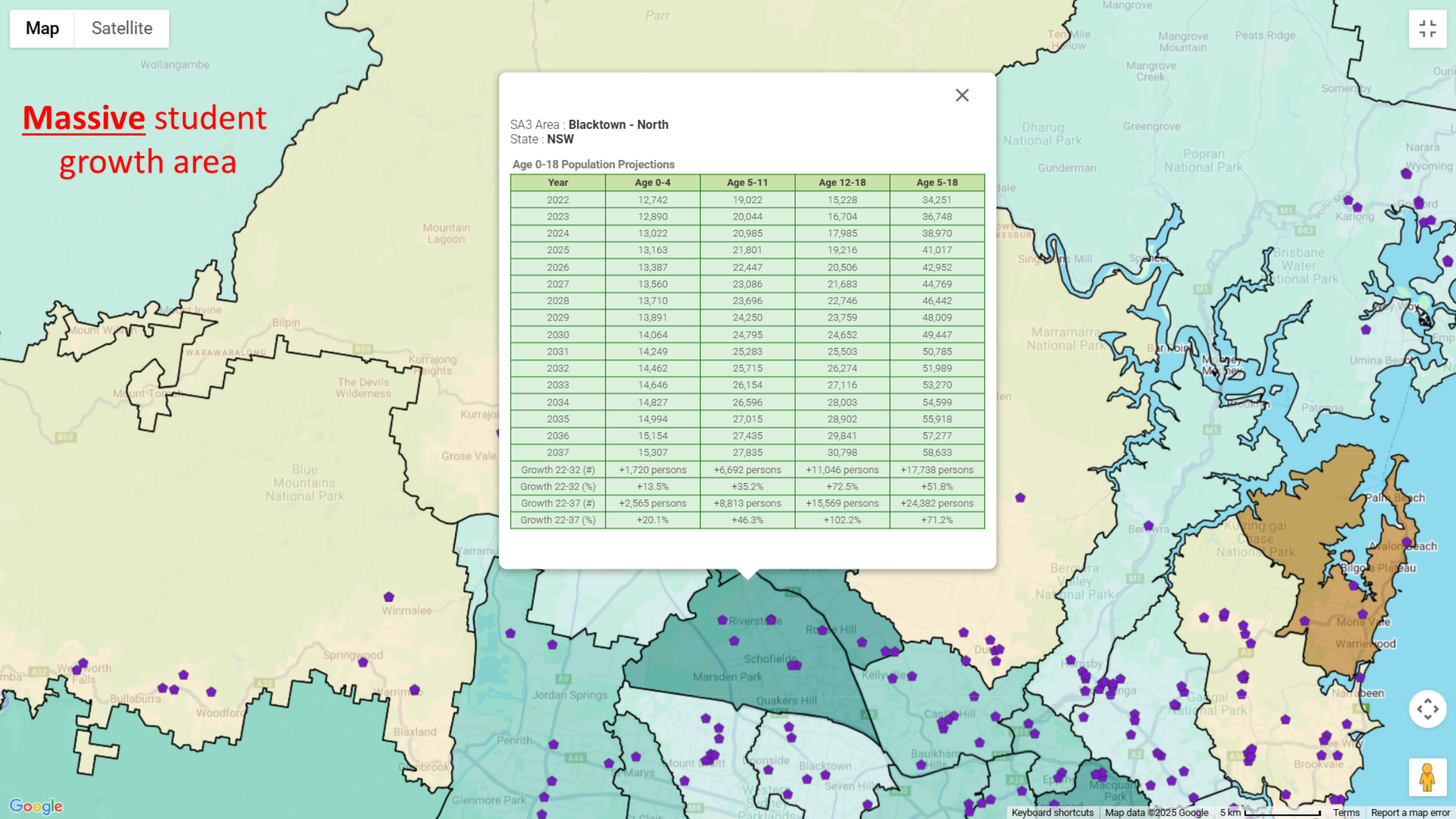
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SA3 Area : Blacktown - North

State : NSW

Age 0-18 Population Projections

Year	Age 0-4	Age 5-11	Age 12-18	Age 5-18
2022	12,742	19,022	15,228	34,251
2023	12,890	20,044	16,704	36,748
2024	13,022	20,985	17,985	38,970
2025	13,163	21,801	19,216	41,017
2026	13,387	22,447	20,506	42,952
2027	13,560	23,086	21,683	44,769
2028	13,710	23,696	22,746	46,442
2029	13,891	24,250	23,759	48,009
2030	14,064	24,795	24,652	49,447
2031	14,249	25,283	25,503	50,785
2032	14,462	25,715	26,274	51,989
2033	14,646	26,154	27,116	53,270
2034	14,827	26,596	28,003	54,599
2035	14,994	27,015	28,902	55,918
2036	15,154	27,435	29,841	57,277
2037	15,307	27,835	30,798	58,633
Growth 22-32 (#)	+1,720 persons	+6,692 persons	+11,046 persons	+17,738 persons
Growth 22-32 (%)	+13.5%	+35.2%	+72.5%	+51.8%
Growth 22-37 (#)	+2,565 persons	+8,813 persons	+15,569 persons	+24,382 persons
Growth 22-37 (%)	+20.1%	+46.3%	+102.2%	+71.2%



Map

Satellite

SA3 Area : **Pittwater**
State : **NSW**

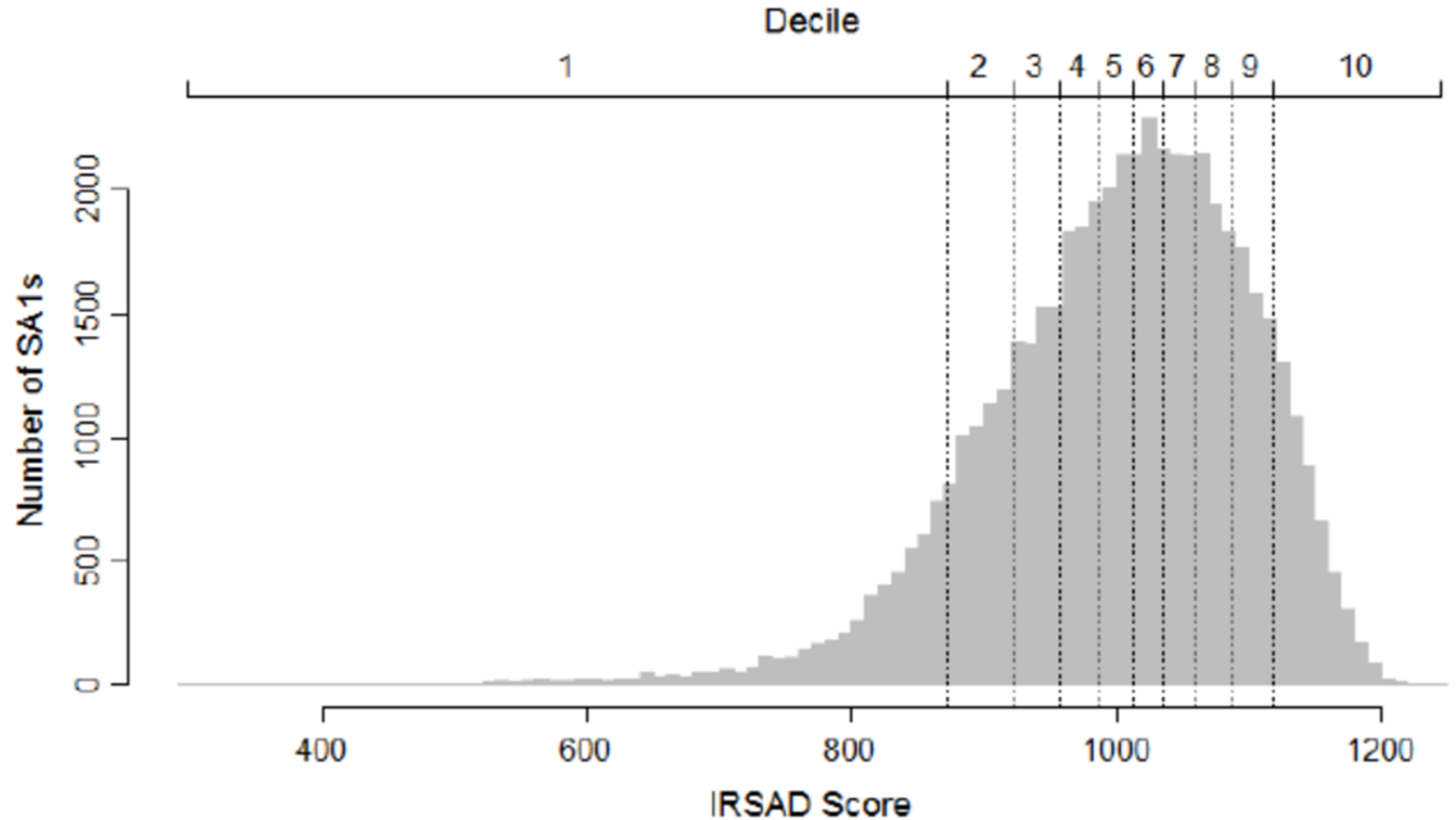
Age 0-18 Population Projections

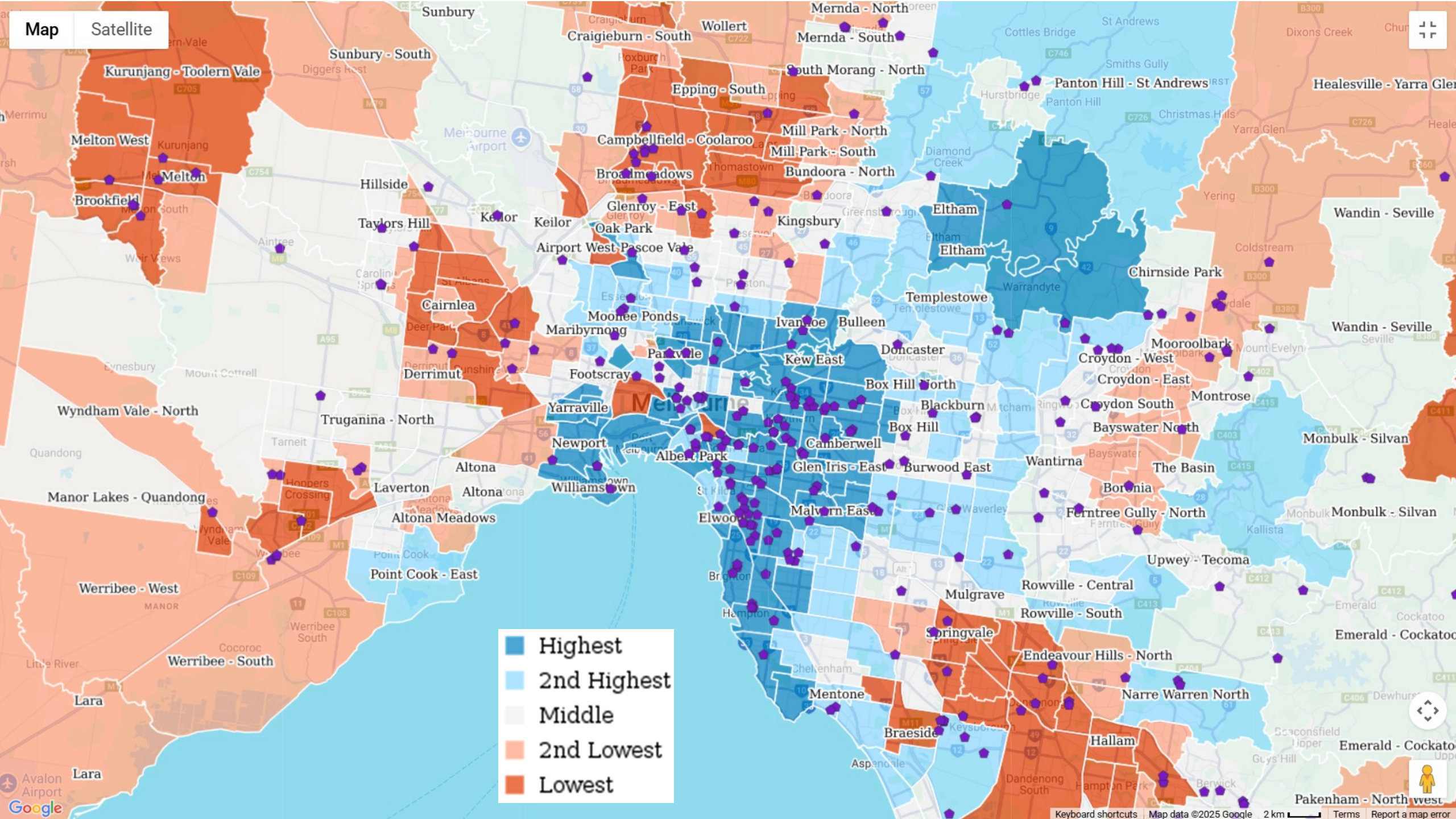
Year	Age 0-4	Age 5-11	Age 12-18	Age 5-18
2022	3,036	5,634	6,189	11,823
2023	2,999	5,515	6,383	11,899
2024	2,929	5,415	6,427	11,841
2025	2,862	5,297	6,457	11,754
2026	2,758	5,227	6,452	11,679
2027	2,642	5,130	6,417	11,547
2028	2,547	5,050	6,330	11,380
2029	2,461	4,955	6,262	11,217
2030	2,383	4,864	6,140	11,004
2031	2,320	4,750	6,051	10,801
2032	2,267	4,610	5,961	10,571
2033	2,206	4,481	5,863	10,344
2034	2,146	4,348	5,760	10,108
2035	2,084	4,219	5,652	9,871
2036	2,022	4,089	5,540	9,630
2037	1,959	3,957	5,425	9,382
Growth 22-32 (#)	-769 persons	-1,024 persons	-229 persons	-1,253 persons
Growth 22-32 (%)	-25.3%	-18.2%	-3.7%	-10.6%
Growth 22-37 (#)	-1,077 persons	-1,677 persons	-764 persons	-2,441 persons
Growth 22-37 (%)	-35.5%	-29.8%	-12.3%	-20.6%

Large forecast reduction
student age children

Explanation - SEIFA - Socio-Economic Index for Areas

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





ACARA data - Australia by the numbers

	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 – market share and % changes over time

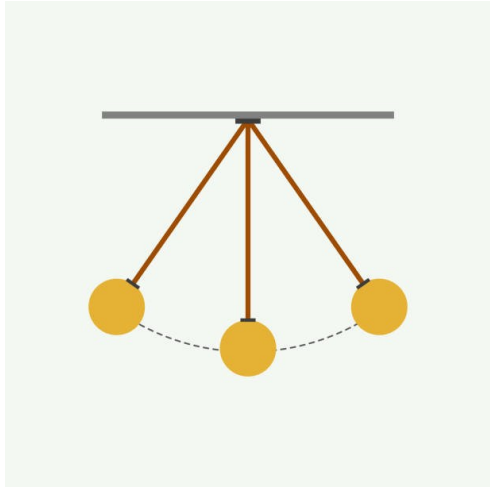
	2008	2013	2020	2024	2008-2024
Catholic	18.9%	19.1%	18.1%	18.5%	19.3%
Government	65.9%	65.3%	65.8%	63.5%	16.9%
Independent	15.2%	15.6%	16.1%	18.0%	43.4%
Grand Total	100.0%	100.0%	100.0%	100.0%	21.4%

ACARA data – huge increase in Independent growth

	AUSTRALIA								
	Full Time Equivalent Enrolments								
	2020	2021	2022	2023	2024	2020-2024	2021-2024	2022-2024	2023-2024
Catholic	727,666	736,785	744,061	755,373	768,352	5.59%	4.28%	3.26%	1.72%
Combined	110,878	117,674	123,947	130,875	139,354	25.68%	18.42%	12.43%	6.48%
Primary	354,970	354,818	354,710	356,362	359,949	1.40%	1.45%	1.48%	1.01%
Secondary	258,830	261,159	262,129	264,530	264,846	2.32%	1.41%	1.04%	0.12%
Special	2,989	3,133	3,275	3,606	4,202	40.59%	34.12%	28.28%	16.53%
Government	2,643,597	2,637,137	2,619,520	2,627,224	2,632,284	-0.43%	-0.18%	0.49%	0.19%
Combined	196,476	197,882	200,975	201,675	200,818	2.21%	1.48%	-0.08%	-0.43%
Primary	1,500,380	1,487,327	1,457,758	1,457,005	1,452,635	-3.18%	-2.33%	-0.35%	-0.30%
Secondary	913,442	918,295	925,728	932,326	941,153	3.03%	2.49%	1.67%	0.95%
Special	33,299	33,632	35,059	36,218	37,678	13.15%	12.03%	7.47%	4.03%
Independent	647,214	669,203	690,734	716,848	744,961	15.10%	11.32%	7.85%	3.92%
Combined	562,620	582,872	602,862	624,584	648,002	15.18%	11.17%	7.49%	3.75%
Primary	28,182	29,270	28,458	29,035	29,739	5.52%	1.60%	4.50%	2.42%
Secondary	42,816	43,591	44,722	46,451	47,937	11.96%	9.97%	7.19%	3.20%
Special	13,595	13,471	14,693	16,778	19,284	41.85%	43.15%	31.25%	14.94%
Grand Total	4,018,477	4,043,125	4,054,315	4,099,444	4,145,597	3.16%	2.53%	2.25%	1.13%

Which way is the Pendulum moving?

My View



- In high socio-economic areas with low fertility rate and unaffordable for migrants and young people, the student number will decrease
- Many schools will need to reach further out for students to maintain status quo.
- In scenario planning, be prepared for decreasing student numbers at many Independent and Catholic Secondary schools.

Looking into the Future

- Interesting to see if the Independent schools will keep growing?
- Many are indicating they are "FULL".
- Does it suit the Government to let Non-Government schools take over more of the load? Already announced "Better and Fairer Schools Agreement (2025 – 2034)".
- Politically – does it suit Labor State Governments to apply payroll taxes? Think Vote loss with parents.
- If the economy is declining, will this cause a move back to lower fees (Government schools)?

Examples

Information we can use to make the right
business decisions.

Publicly available data to help us.

- Socio Economic Index for Areas (SEIFA)
- ABS Census 2021
- ABS Census data related to type of school attended
- ABS Population Projections 2022 – 2032 by sex and age and extrapolated to 2037.
- MySchools + ACARA data + ACECQA data (ELC's)

Your Information

- 2021 & 2024 Students (and 2016 if available)
 - ID number, address, feeder school, class year, use school buses?
- Future Enrolments
 - Name or ID number, address, feeder school (if known), year of admission and class year
- Alumni
 - we normally suggest latest available
- Bus Lines and Student Users

Peter Buckingham



**Peter Buckingham BSc, GradDip (Mkt Mdl),
CMC, CFE, FFCA, MEdPlus, WFA, ACAVic**

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

<https://spectrumanalysis.com.au/about-us/team/peter-buckingham>

peterb@spectrumanalysis.com.au

[+61 411 604 921](tel:+61411604921)

Co-Founder and Managing Director of Spectrum Analysis Australia Pty Ltd, a boutique provider of quantitative geodemographic modelling, facts, data and analysis services based in Surrey Hills, Melbourne, Victoria Australia.

Bachelor of Science

Graduate Diploma in Market Modelling

Certified Management Consultant

Certified Franchise Executive

Fellow, Franchise Council of Australia

Member, Educate Plus

Australian Affiliate, World Franchise Associates

Member, Australian Childcare Alliance (Victoria)