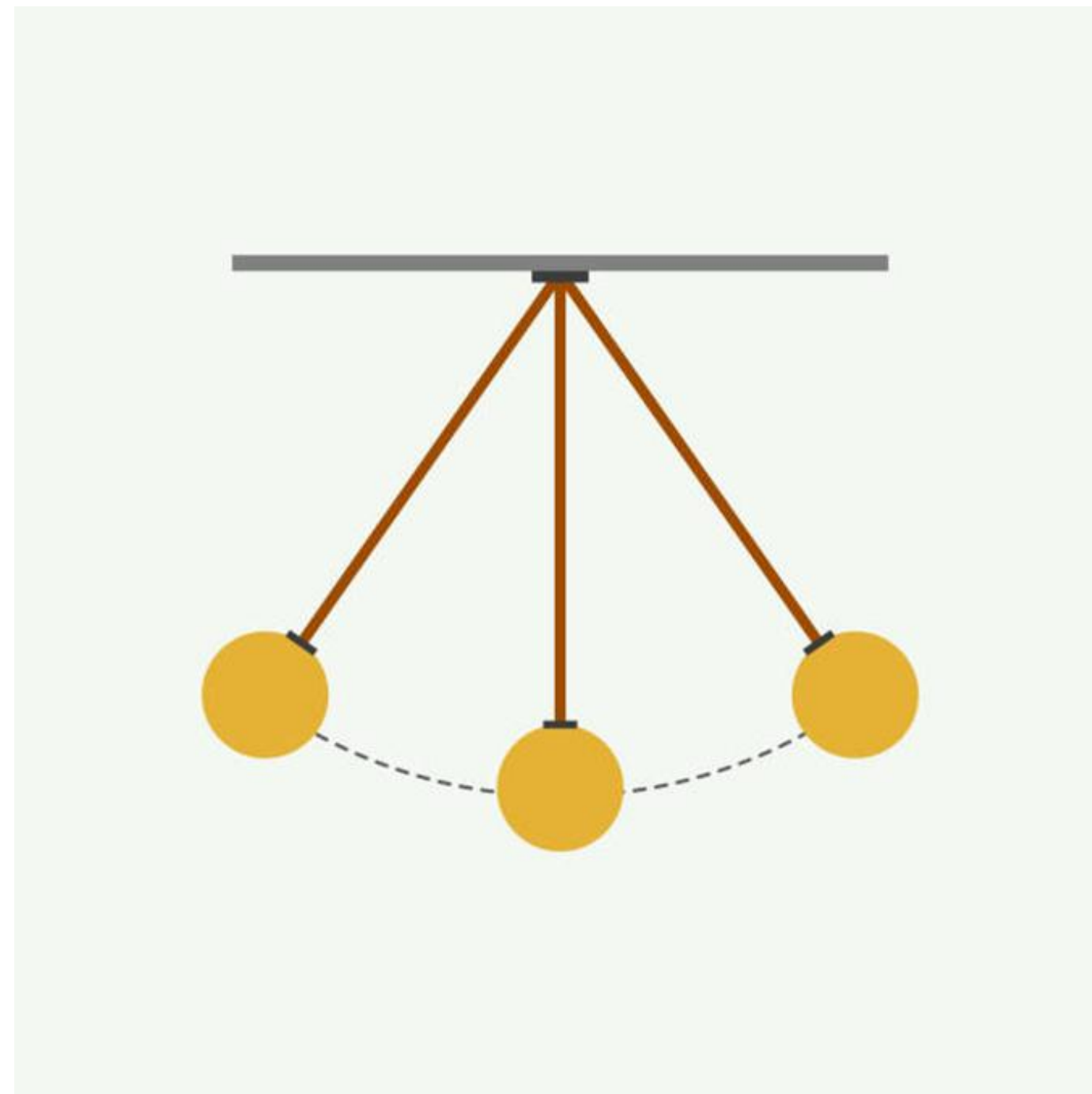


Presentation at the Educate Plus NSW / ACT Summit by Peter Buckingham – MD of Spectrum Analysis

NSW/ACT Chapter Summit
23 & 24 October 2025, Sydney

The Pendulum keeps moving



Demographic shifts across Sydney (and what they mean for schools and families)

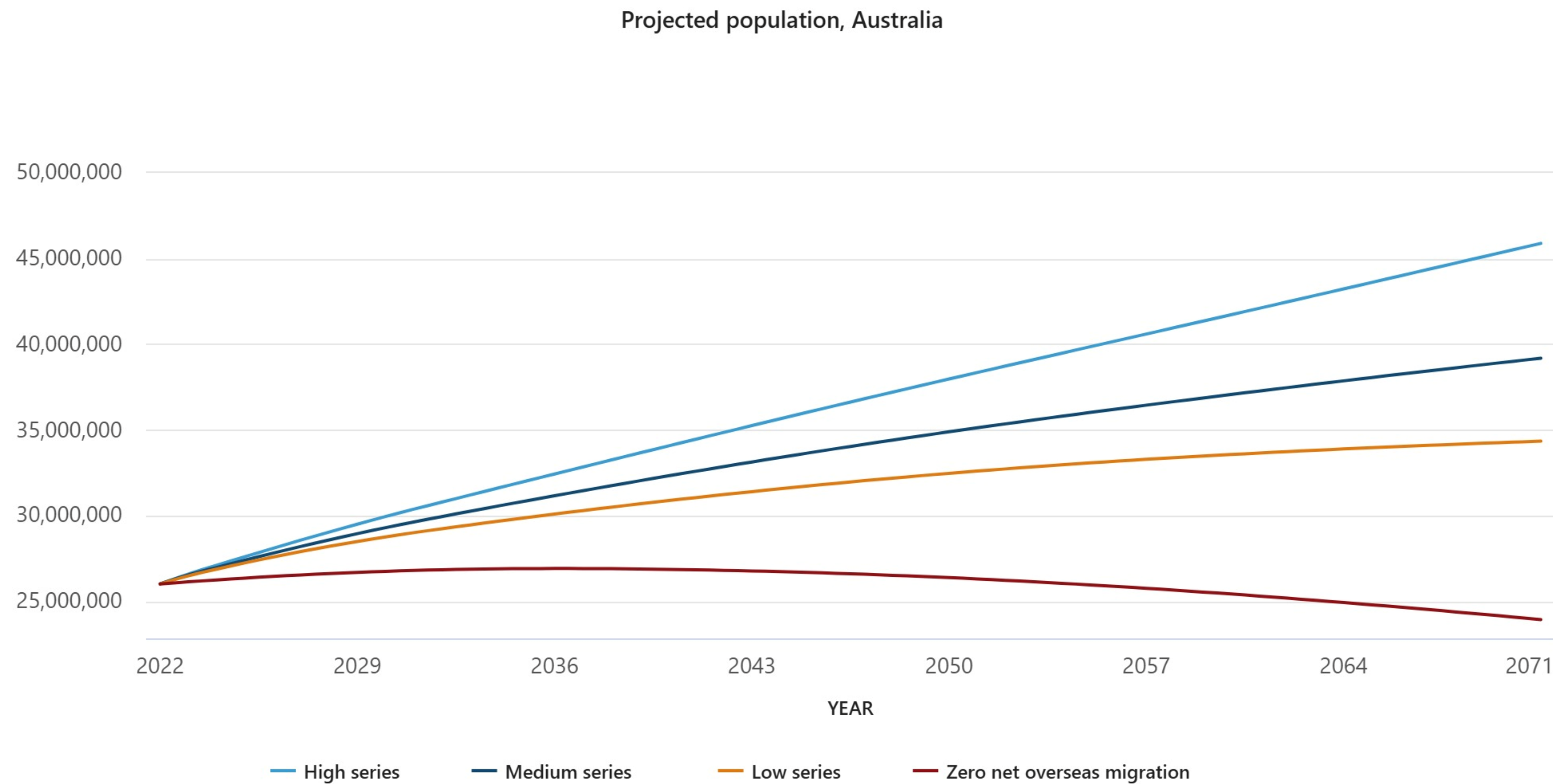
- **By the end of my talk you will know more about:**
 - Big picture for Australia's Population Forecasts.
 - What is the growth of Sydney and surrounding areas going to look like?

&

Demographic shifts across Sydney (and what they mean for schools and families)

- **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

Demographic shifts across Australia



Source: Australian Bureau of Statistics, Population Projections, Australia 2022 (base) - 2071

Demographic shifts across Australia

Quotes from the ABS website

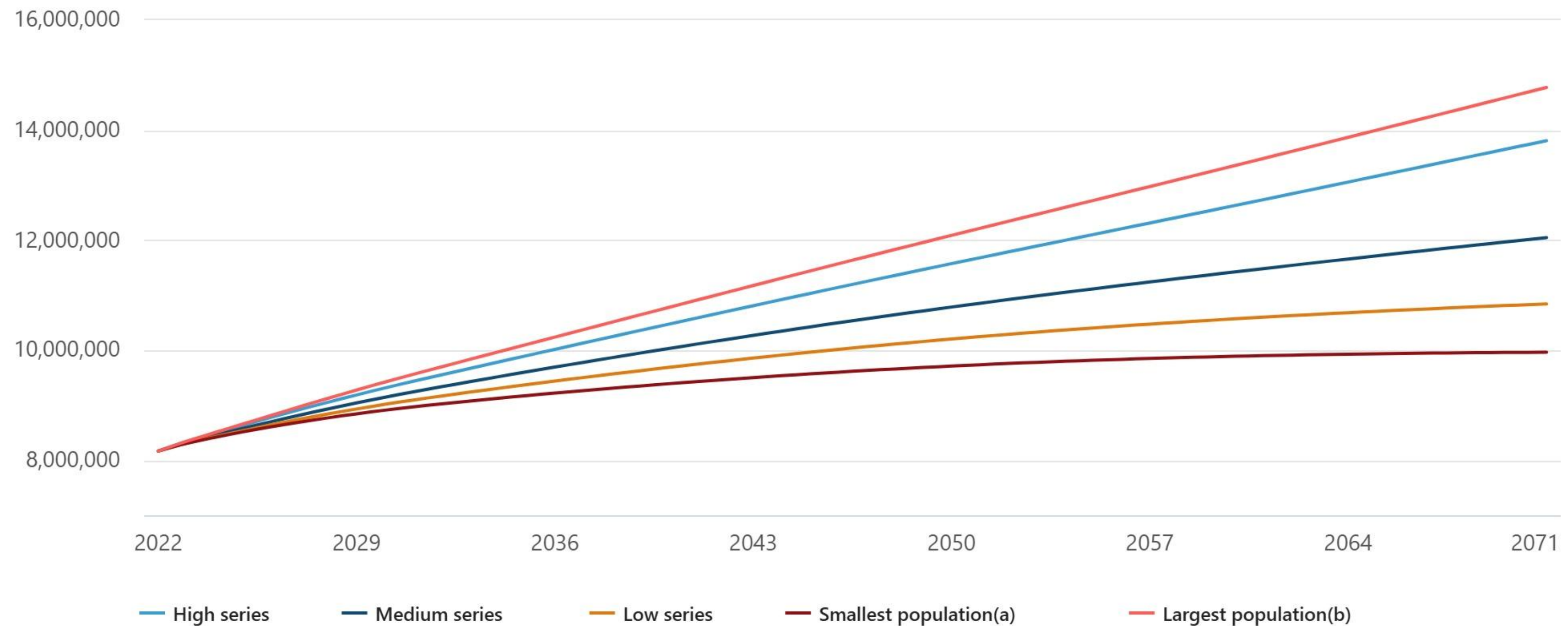
Australia's population in 2022 (26 million) is projected to reach between 34.3 and 45.9 million people by 2071.

The current ten year average annual growth rate (1.4%) is projected to decline to between 0.2% and 0.9%.

The median age (38.5 years) is projected to increase to between 43.8 and 47.6 years.

Demographic shifts across NSW

Projected population, New South Wales



a. Results from low assumptions for fertility, mortality and overseas migration, with small interstate migration flows.
b. Results from high assumptions for fertility, mortality and overseas migration, with large interstate migration flows.

Source: Australian Bureau of Statistics, Population Projections, Australia 2022 (base) - 2071

Demographic shifts across NSW

Quotes from the ABS website

Sydney is projected to remain constant or increase from 65% of the state's population in 2022 to 66% in 2032.

New South Wales' population of 8.2 million is projected to:

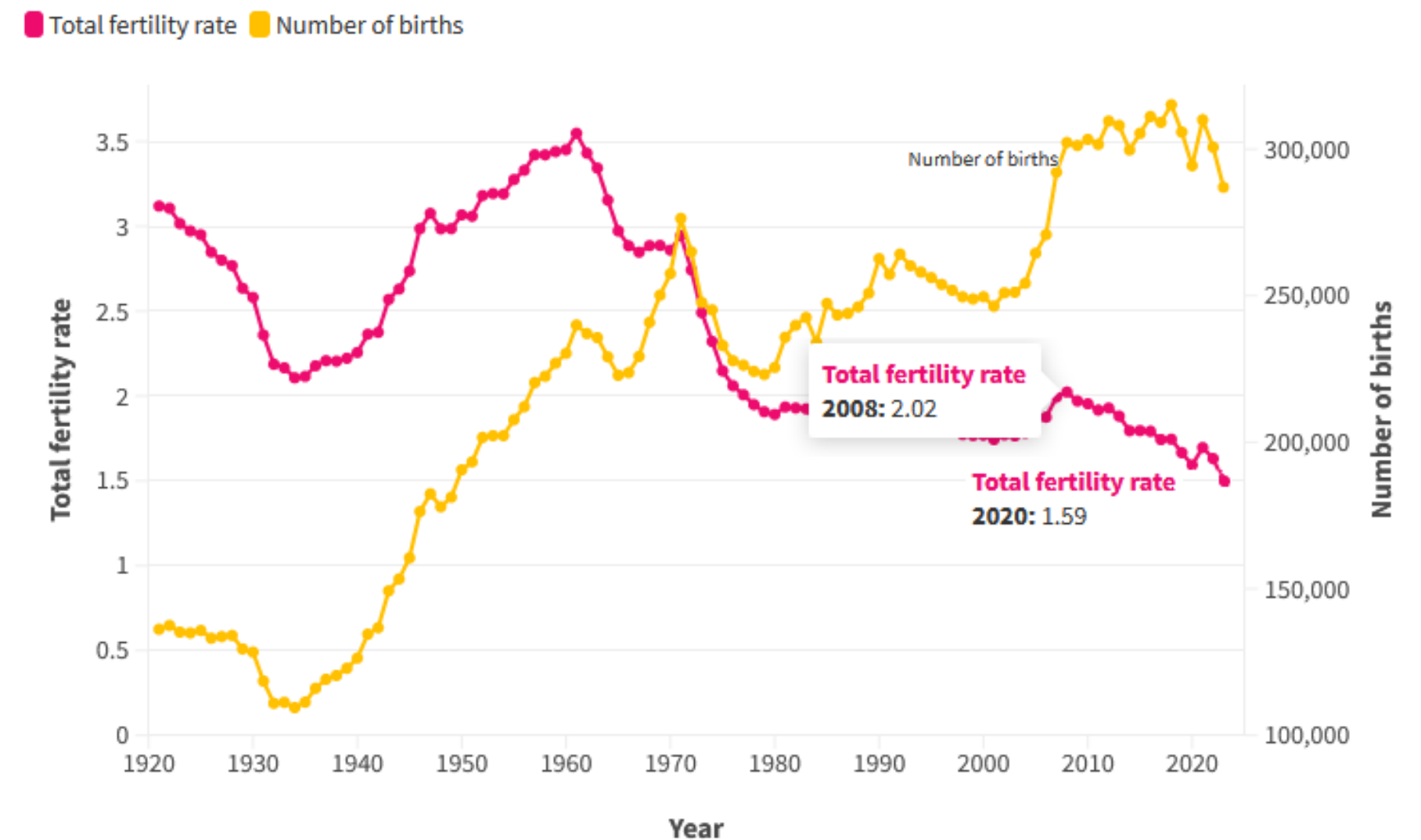
Grow by between 0.4% and 1.2% per year, slightly higher than the average annual growth rate projected for Australia.

Reach between 9.2 million and 9.6 million by 2032, and between 10.8 million and 13.8 million by 2071.

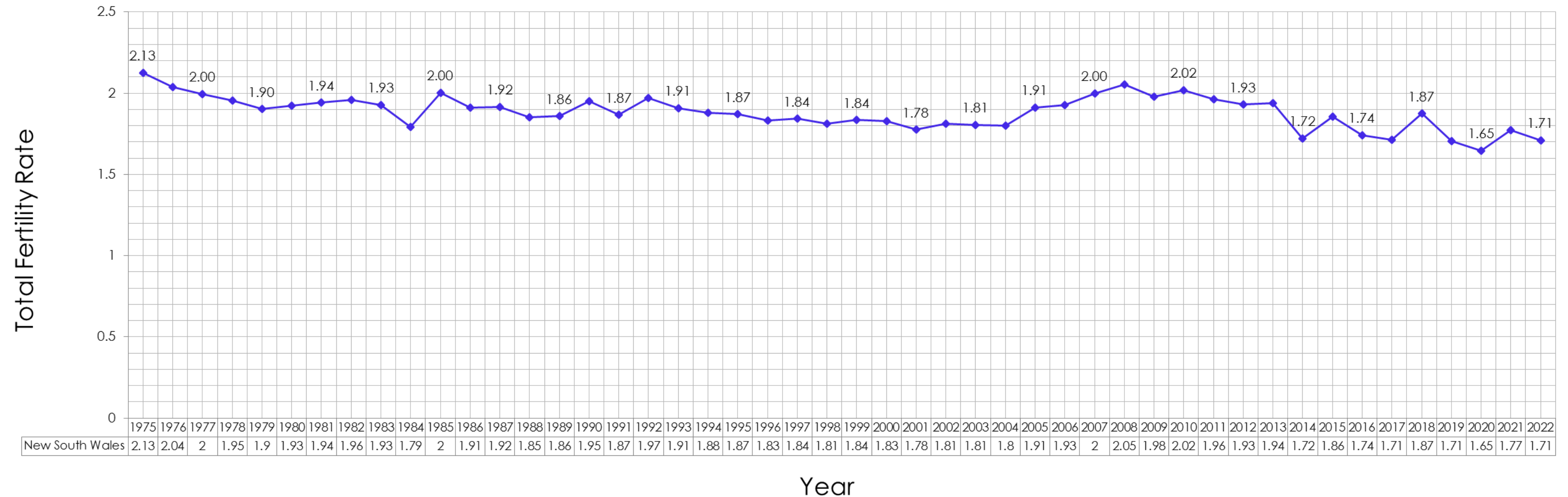
Overview of Student Population Growth in Australia

- 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



New South Wales



- 2001 – 2008 experienced a consistent increase. This trend also happened across the majority of states and territories and national average;
- While the majority of other states and territories experienced a consistent decrease after 2008 peak, New South Wales experienced a fluctuation instead;
- Total fertility rate 2.05 in 2008 was the highest rate in New South Wales since 1976 (there was a higher peak of 2.13 in 1975).

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.**

Overview of Statistical Areas

How are they counted across Australia?

Statistical Areas - Australia wide

SA1's – 61,845

SA2's – 2,473

SA3's – 359

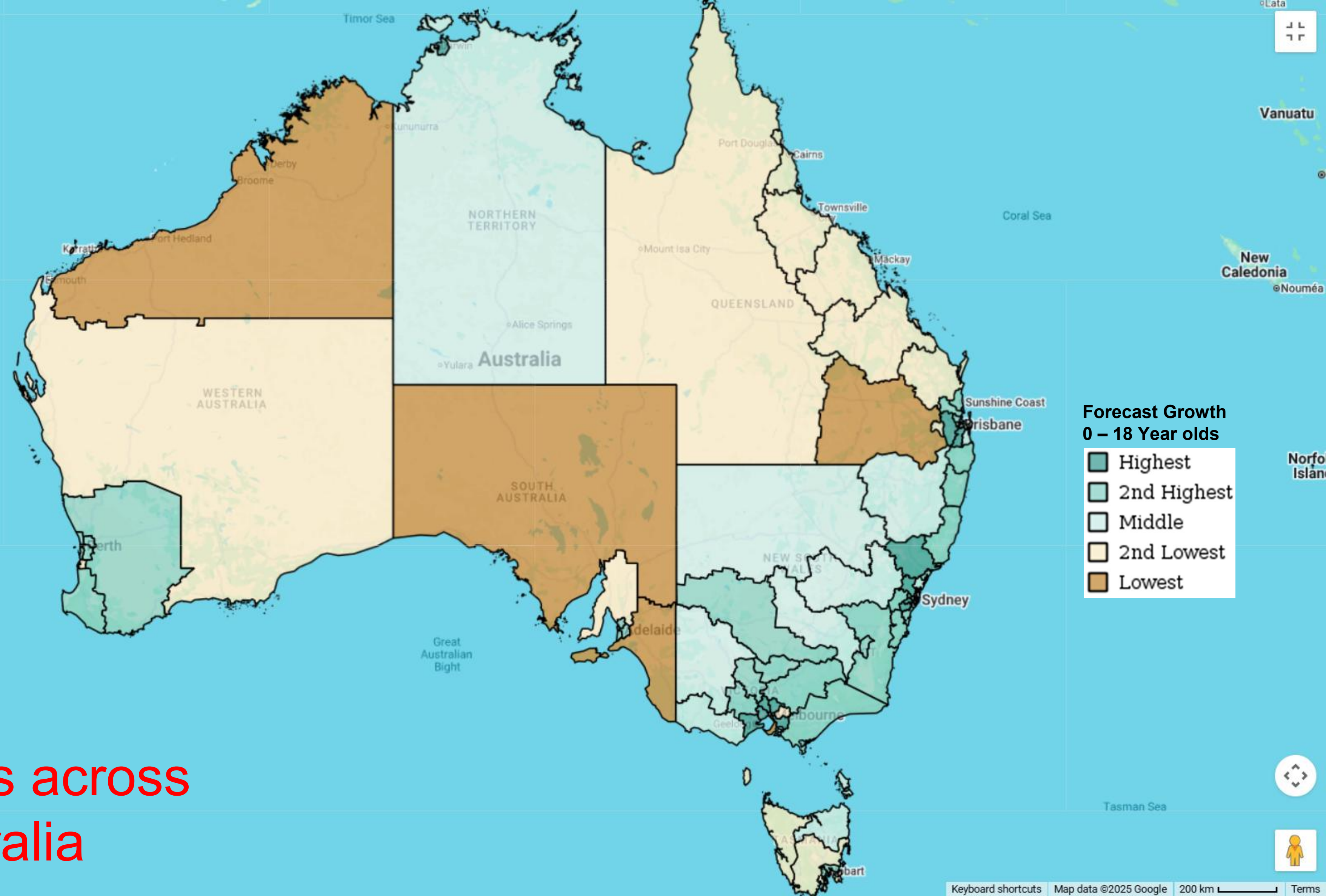
SA4's – 107

Suburbs - 15,760

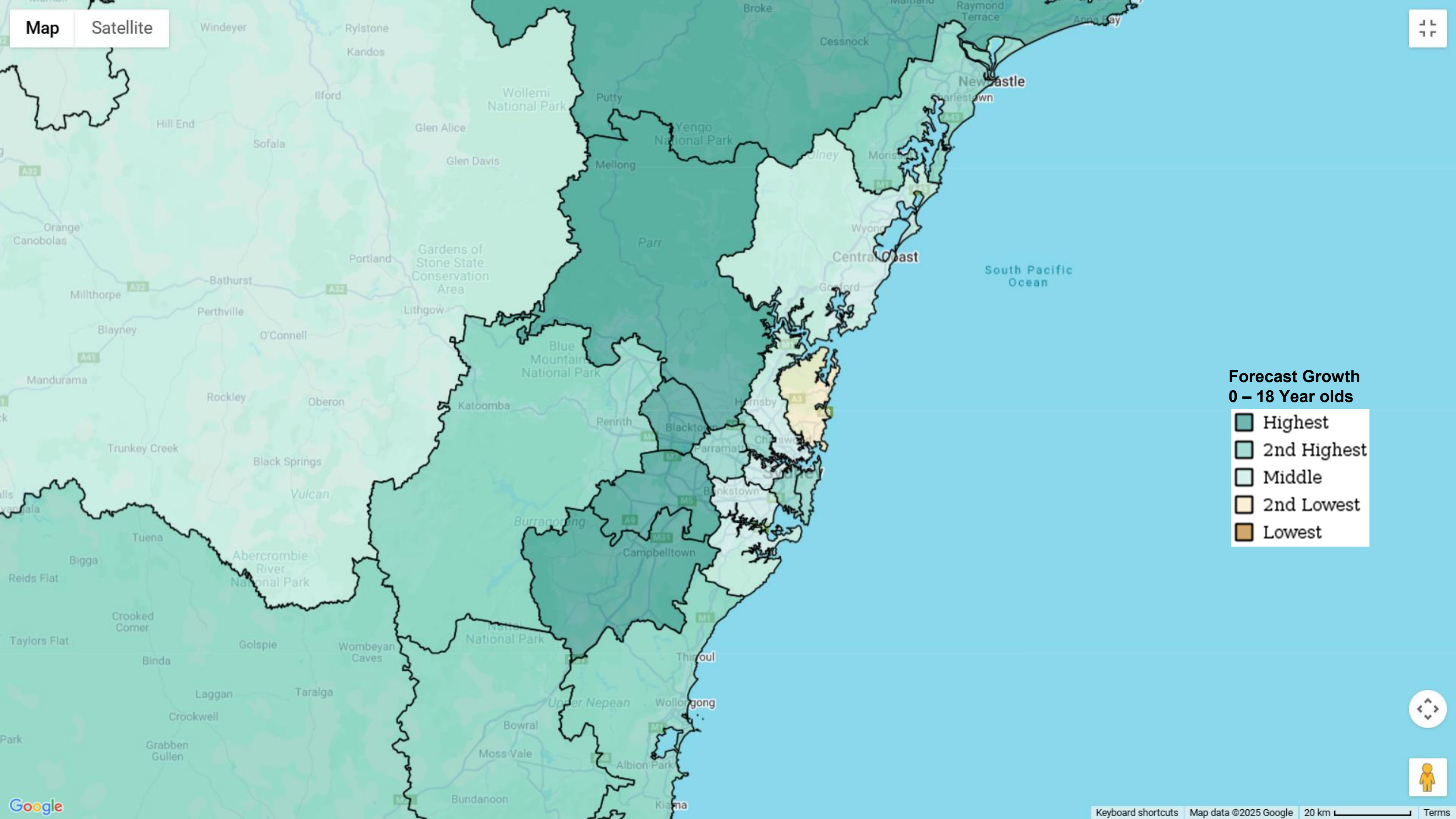
Postcodes - 3,137

States and Territories – 6 + 2

Map Satellite



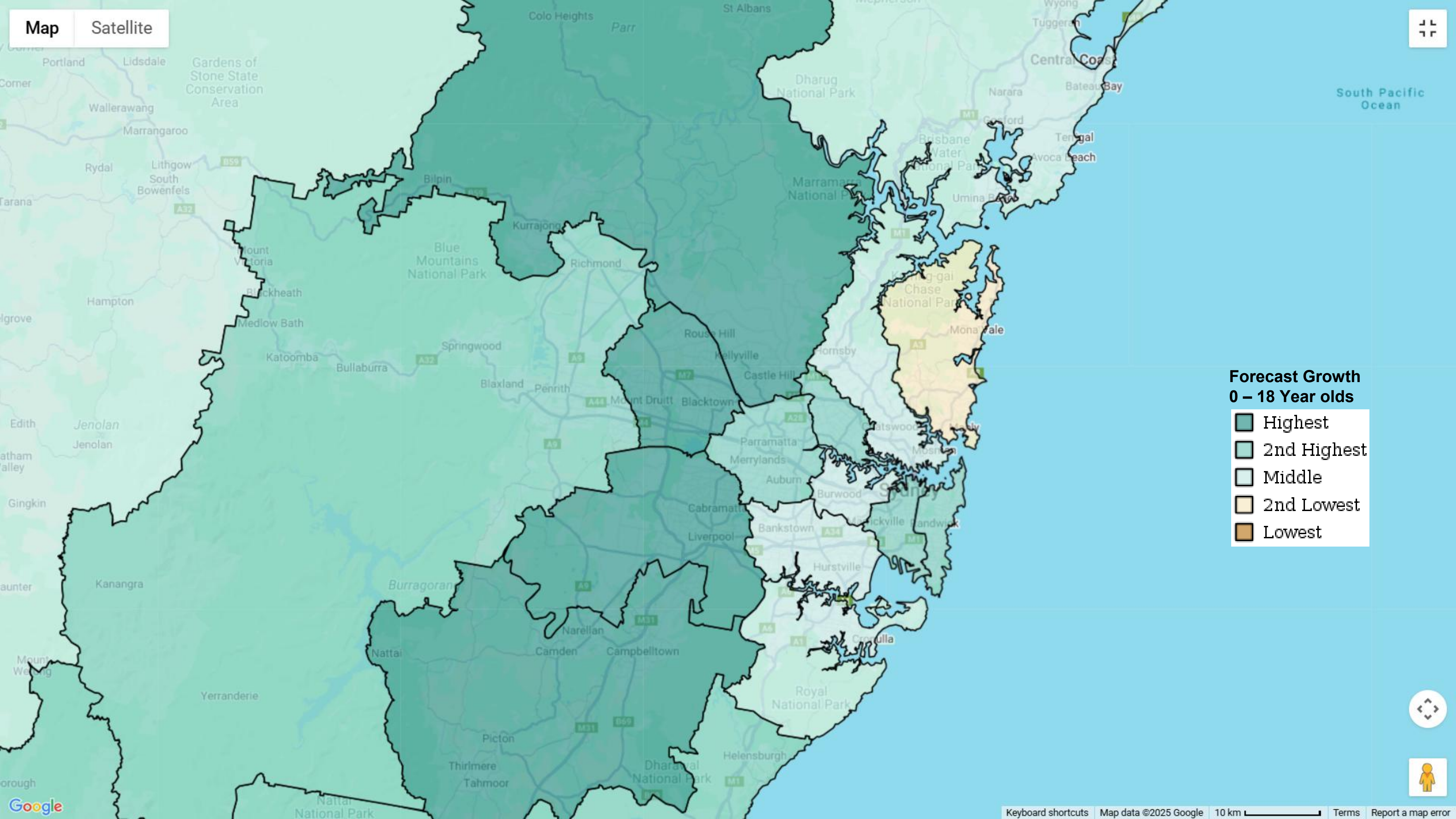
SA4's across
Australia



Forecast Growth
0 – 18 Year olds

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

Map Satellite



**Forecast Growth
0 – 18 Year olds**

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



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

SA4 Name	Total Population Increase	% Total Population Increase	Population Aged 5-18 Increase / Decrease	Population Aged 5-18 Increase / Decrease
Sydney - City and Inner South	30,560	8.2%	1,347	4.3%
Sydney - Baulkham Hills and Hawkesbury	47,878	15.7%	7,331	11.3%
Sydney - Blacktown	51,979	11.5%	7,905	8.3%
Sydney - Eastern Suburbs	10,133	3.7%	-182	-0.5%
Sydney - Inner South West	28,220	4.4%	-1,242	-1.2%
Sydney - Inner West	17,271	5.3%	-540	-1.2%
Sydney - North Sydney and Hornsby	16,160	3.6%	-3,456	-4.4%
Sydney - Northern Beaches	3,182	1.2%	-3,409	-7.0%
Sydney - Outer South West	34,415	10.4%	4,328	6.4%
Sydney - Outer West and Blue Mountains	14,850	4.2%	-102	-0.2%
Sydney - Parramatta	44,706	8.3%	3,046	3.4%
Sydney - Ryde	21,014	9.3%	1,013	2.8%
Sydney - South West	70,685	13.2%	9,863	9.2%
Sydney - Sutherland	8,882	3.7%	-563	-1.3%
Central Coast	13,185	3.6%	-1,255	-2.1%
Metro	413,120	7.3%	24,085	2.5%

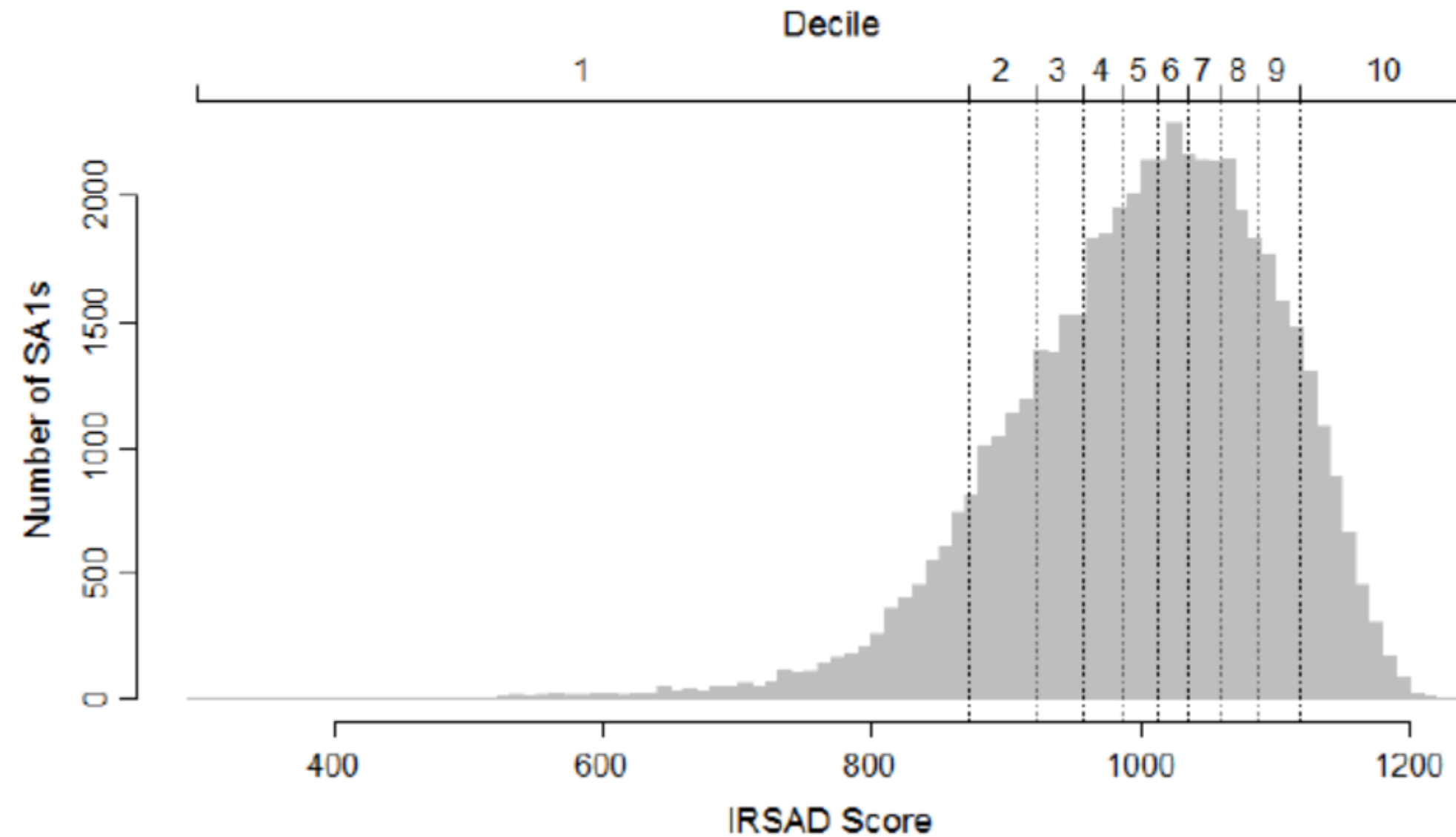
Projected population increase / decrease by SA4 in Regional areas 2026 - 2032

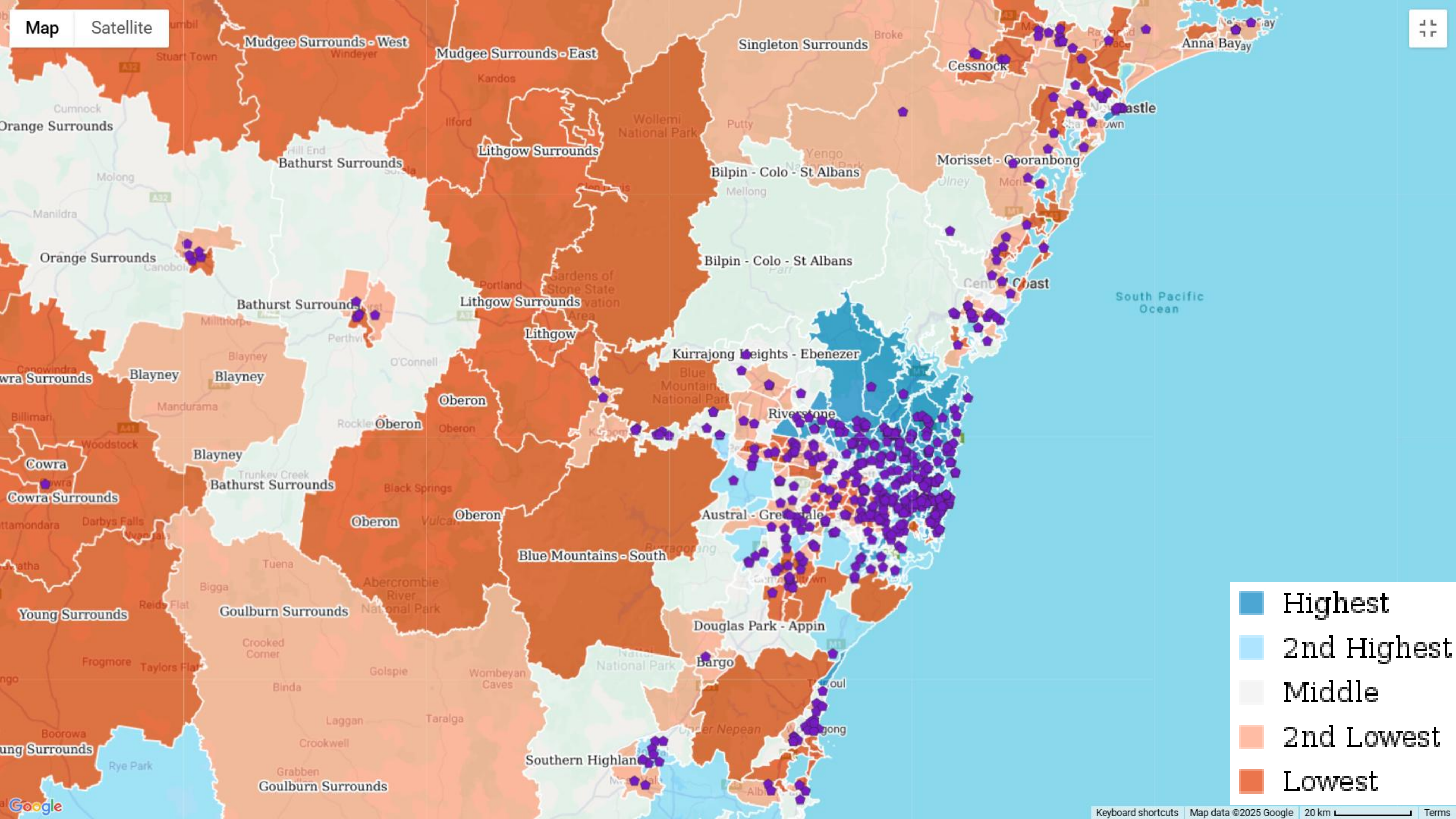
SA4 Name	Total Population Increase	% Total Population Increase	Population Aged 5-18 Increase / Decrease	Population Aged 5-18 Increase / Decrease
Capital Region	19,956	7.8%	1,571	3.8%
Central West	10,470	4.7%	-643	-1.6%
Coffs Harbour - Grafton	9,541	6.2%	574	2.2%
Far West and Orana	3,085	2.6%	-279	-1.3%
Hunter Valley exc Newcastle	40,264	12.2%	3,017	5.3%
Illawarra	25,162	7.4%	-60	-0.1%
Mid North Coast	19,812	8.0%	1,318	3.5%
Murray	9,892	7.5%	446	2.1%
New England and North West	6,606	3.4%	-646	-1.9%
Newcastle and Lake Macquarie	39,354	9.3%	1,727	2.6%
Richmond - Tweed	15,776	5.8%	690	1.6%
Riverina	7,104	4.2%	-636	-2.1%
Southern Highlands and Shoalhaven	13,924	8.0%	1,202	4.5%
<u>Regional</u>	<u>220,946</u>	<u>7.3%</u>	<u>8,281</u>	<u>1.7%</u>

SEIFA

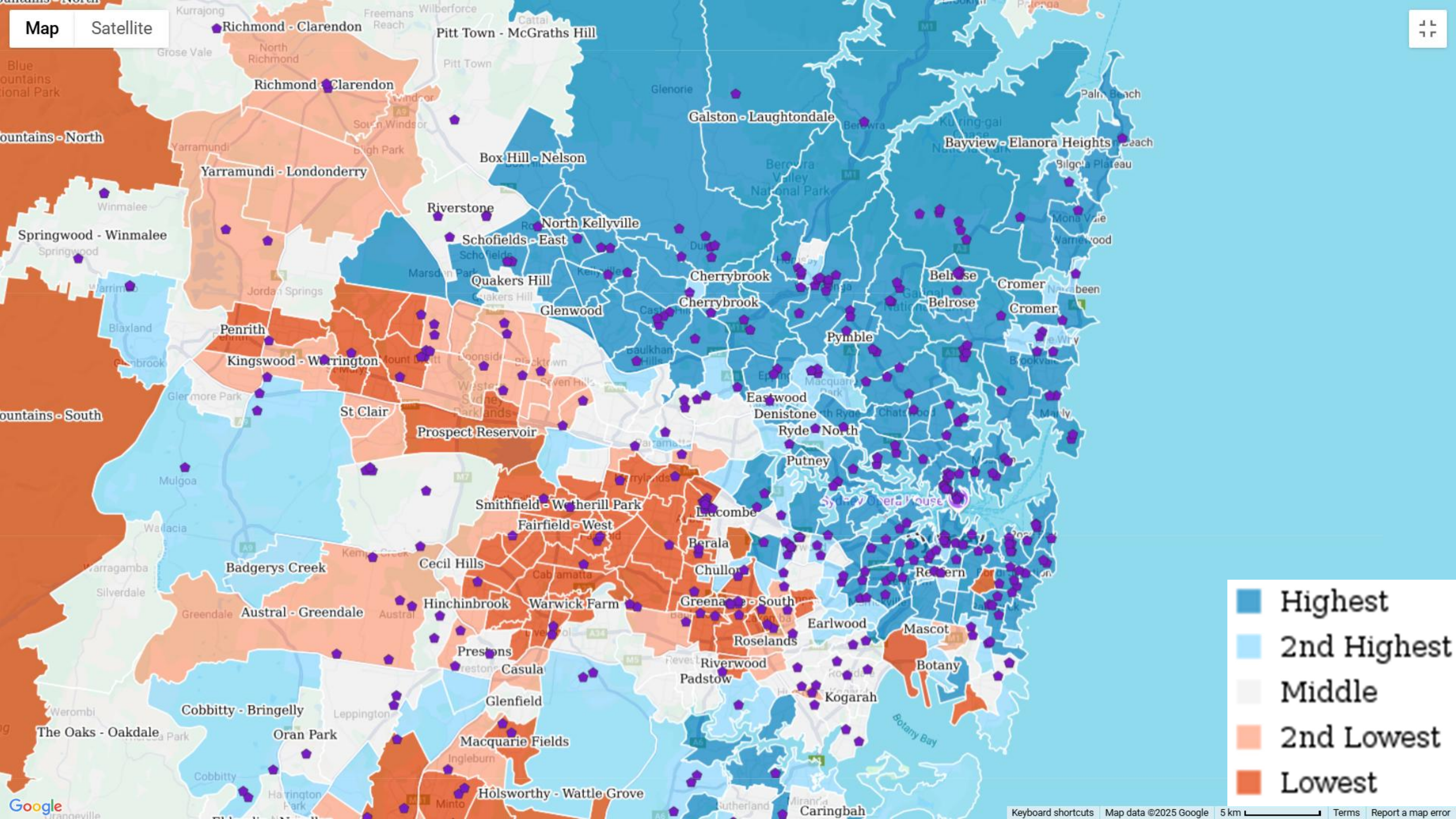
Socio-Economic Index for Areas

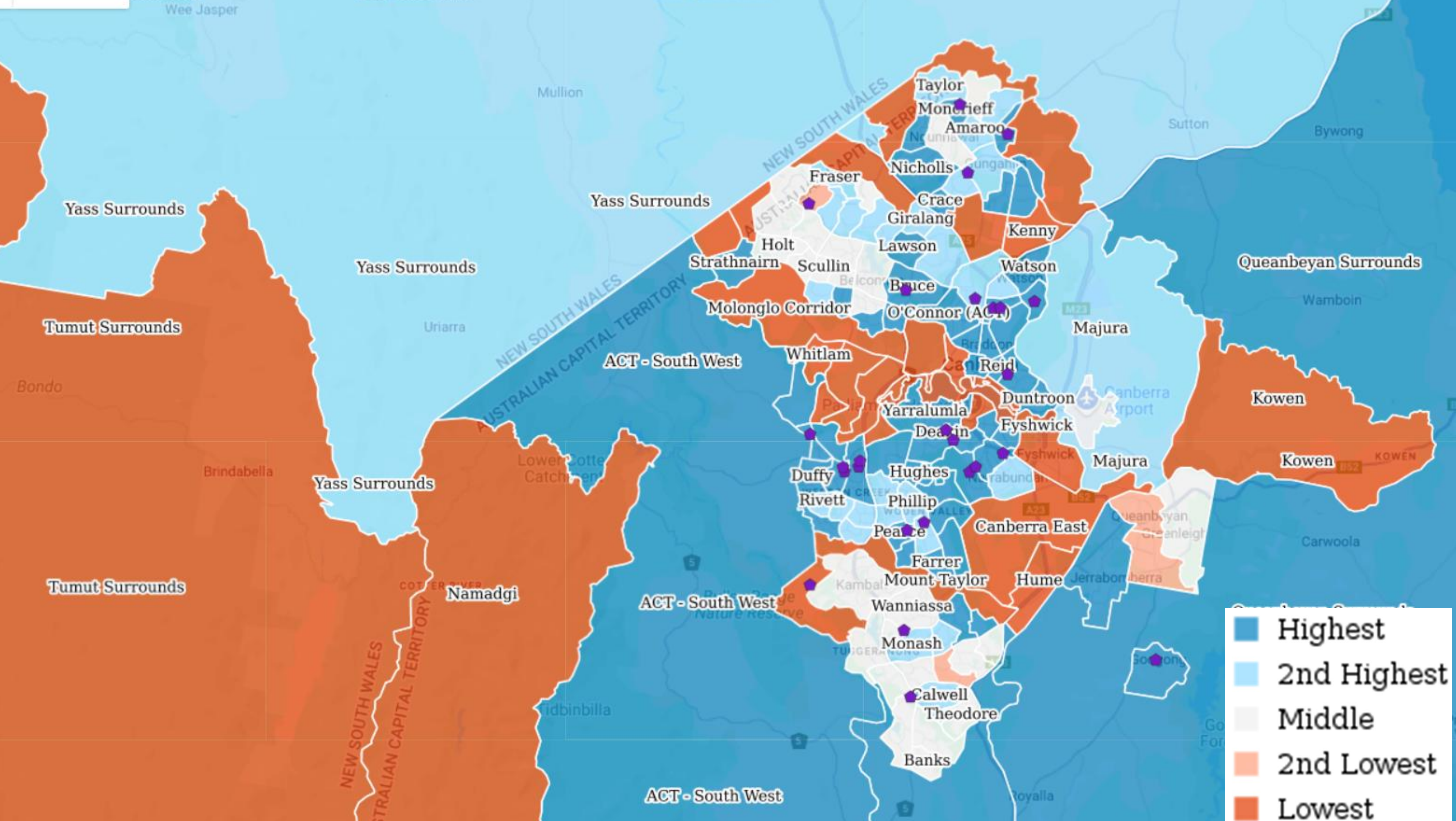
- Highest
- 2nd Highest
- Middle
- 2nd Lowest
- Lowest

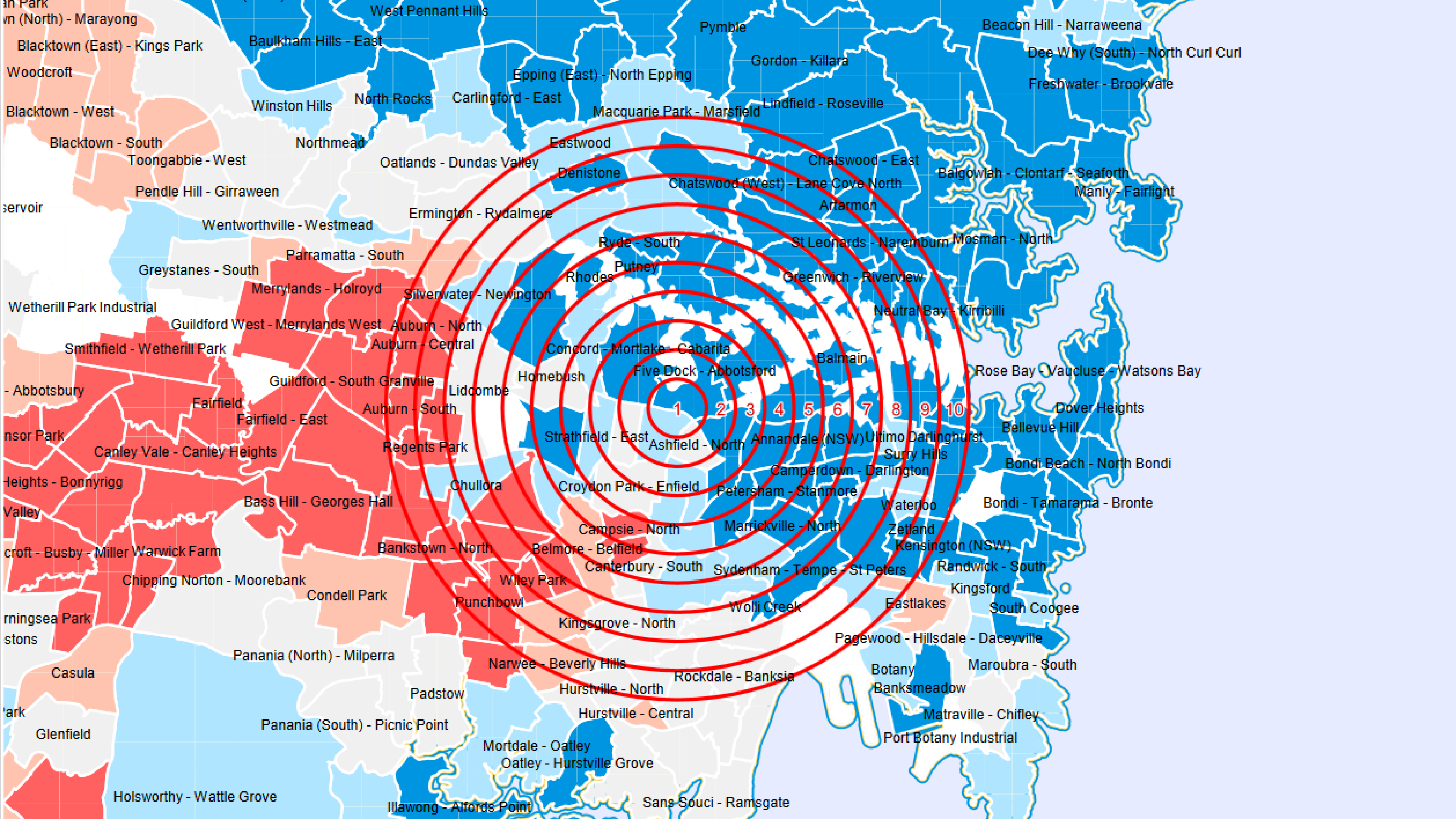




- Highest
- 2nd Highest
- Middle
- 2nd Lowest
- Lowest







How far do our students come from?

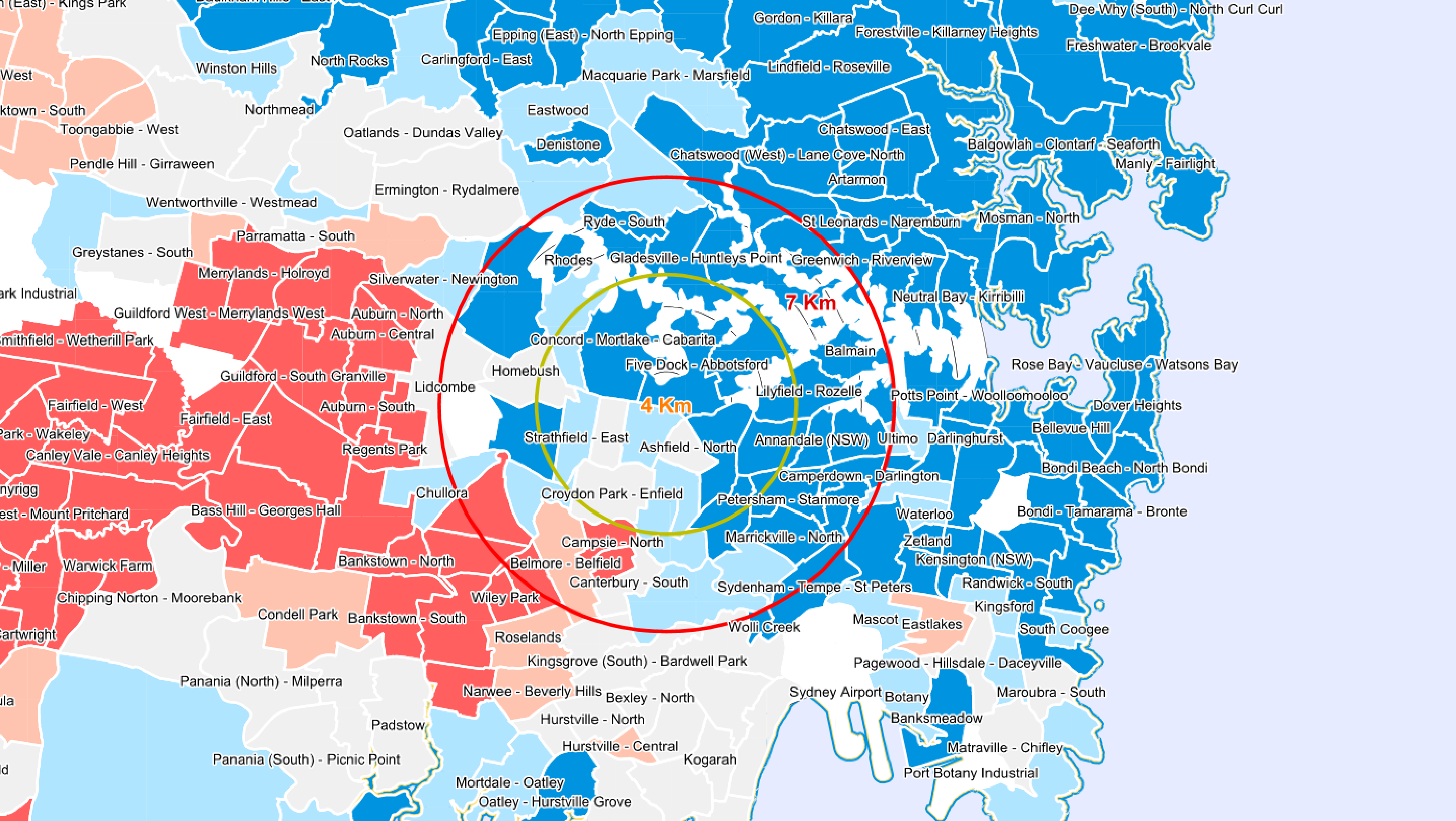
.....Especially in higher socio-economic areas.

Research - Spectrum has undertaken using 5 campuses and over 7,500 students in the top 20% Socio-Economic areas of Inner Sydney.

1km	2km	3km	4km	5km	6km	7km	8km	9km	10km	> 10 km
8.1%	19.3%	32.7%	48.8%	62.1%	71.7%	80.6%	85.7%	88.9%	91.1%	8.9%

Example - Imaginary school of 1,000 students

Distance from School	0-1km	1-2km	2-3km	3-4km	4-5km	5-6km	6-7km	7-8km	8-9km	9-10km	10+km
Number of Students	81	112	134	162	133	96	89	51	32	22	89
Area of concentric ring	3.1	9.4	15.7	22	28.3	34.6	40.8	47.1	53.4	59.7	
Students / sq km	25.8	11.9	8.5	7.4	4.7	2.8	2.2	1.1	0.6	0.4	< 0.4



How far do our students come from?

Research - Spectrum has undertaken using 11 campuses and nearly 13,000 students in Middle and Outer Sydney suburbs.

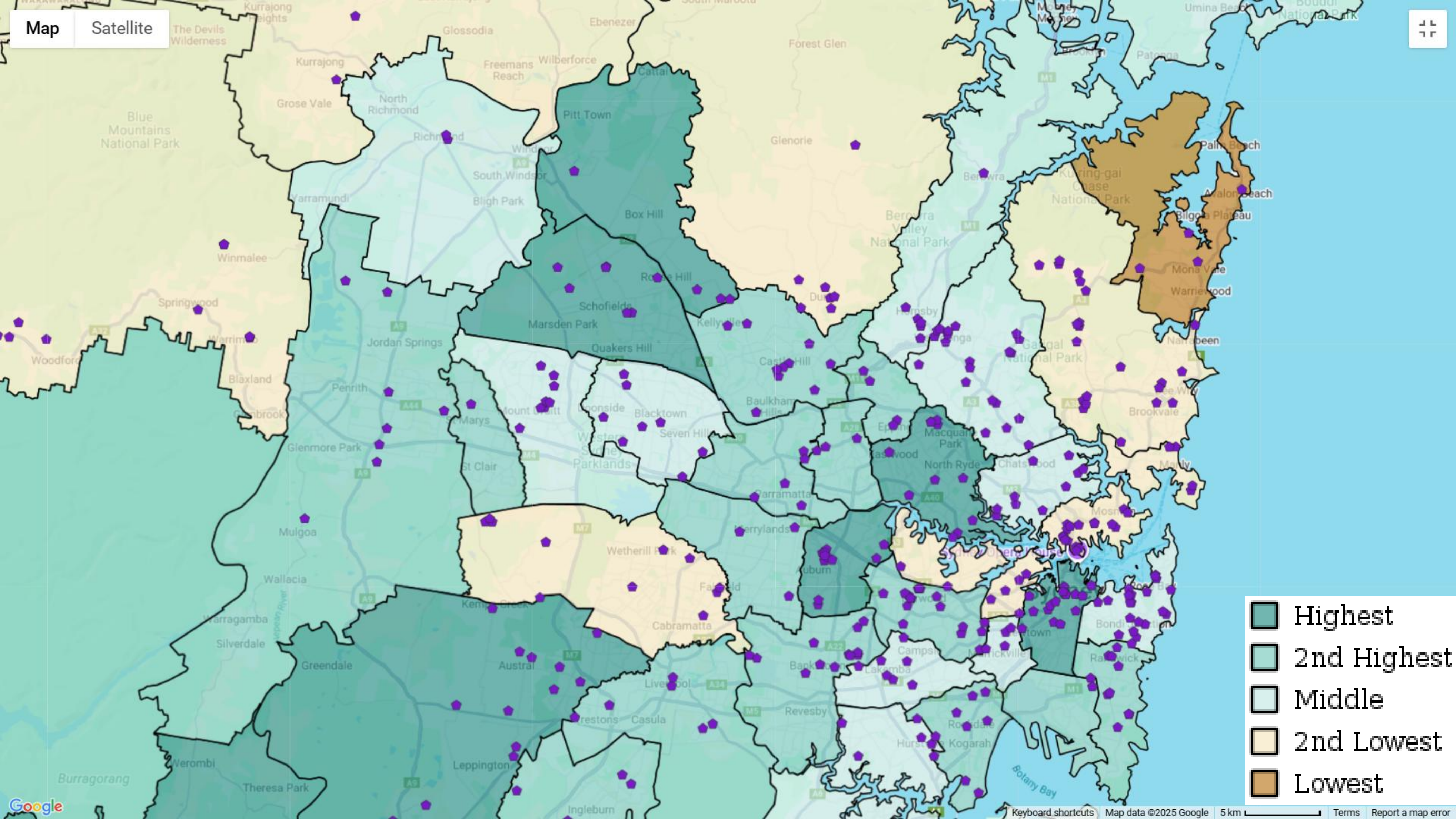
1km	2km	3km	4km	5km	6km	7km	8km	9km	10km	> 10 km
4.6%	12.8%	24.6%	35.7%	43.7%	51.5%	58.8%	66.2%	73.8%	79.7%	20.4 %

Example - Imaginary school of 1,000 students

Distance from School	0-1km	1-2km	2-3km	3-4km	4-5km	5-6km	6-7km	7-8km	8-9km	9-10km	10+km
Number of Students	45	83	117	111	80	79	73	74	75	59	204
Area of concentric ring	3.1	9.4	15.7	22	28.3	34.6	40.8	47.1	53.4	59.7	
Students / sq km	14.3	8.8	7.4	5.0	2.8	2.3	1.8	1.6	1.4	1.0	< 1

Map

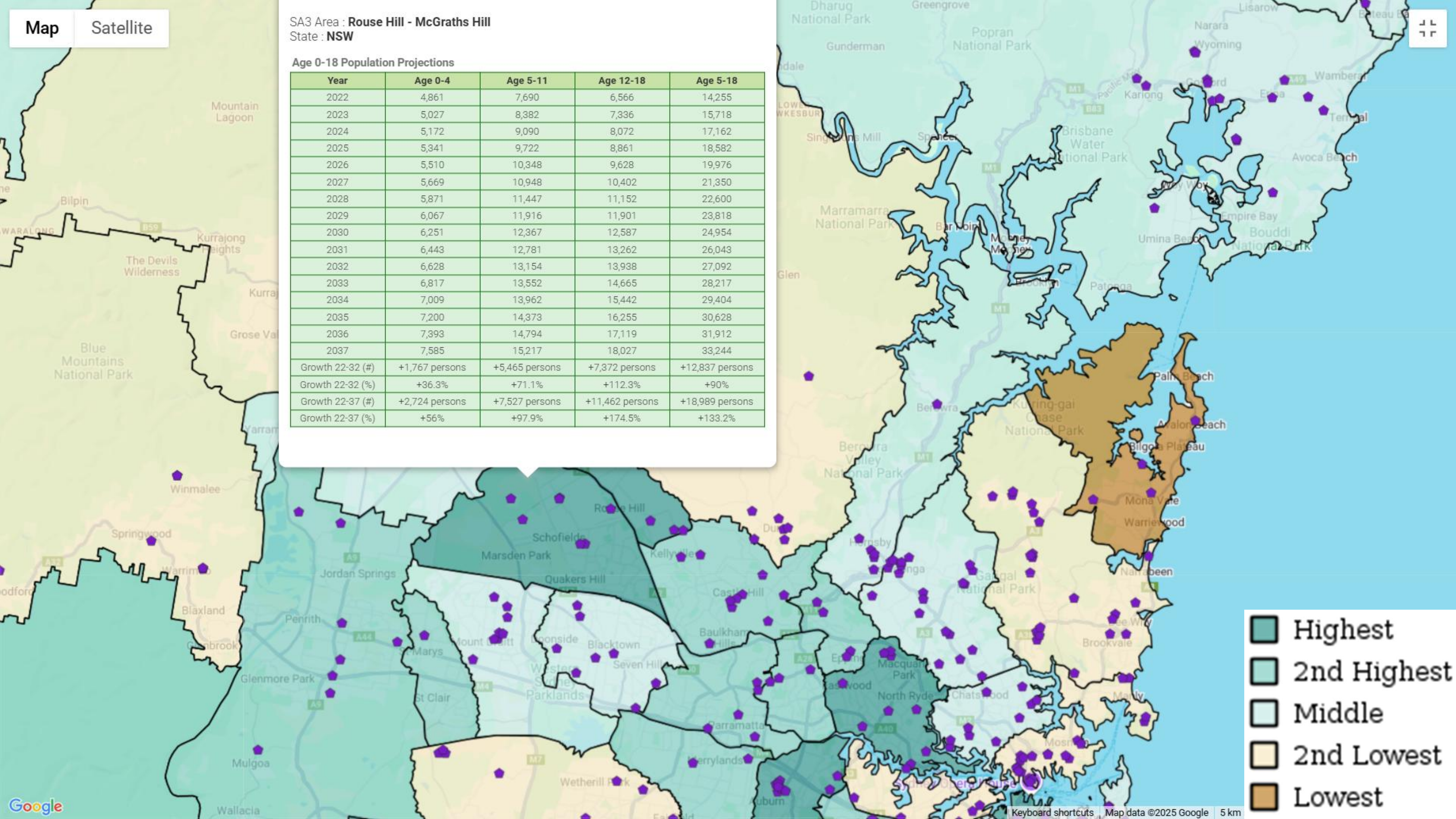
Satellite



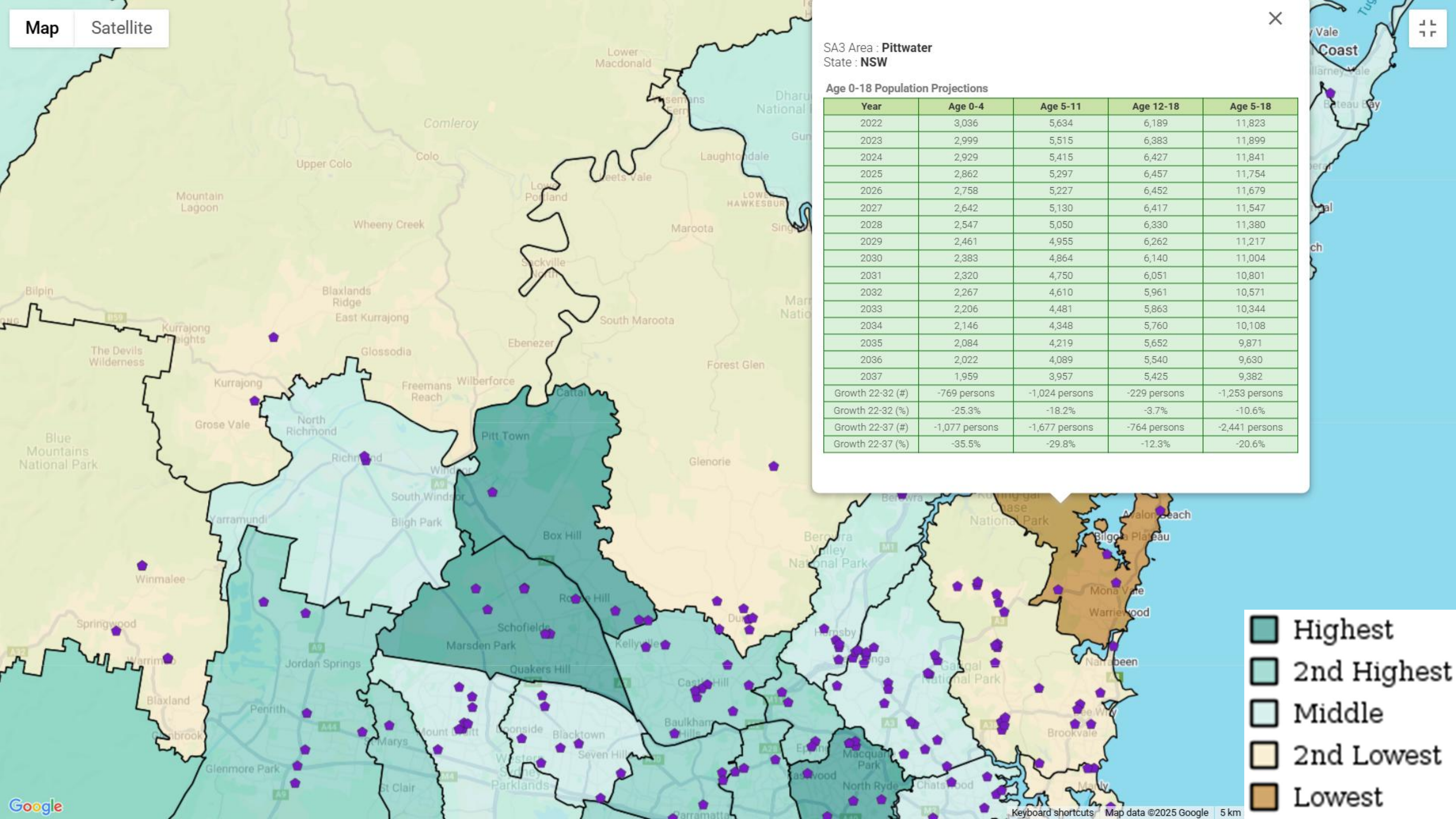
- Highest
- 2nd Highest
- Middle
- 2nd Lowest
- Lowest

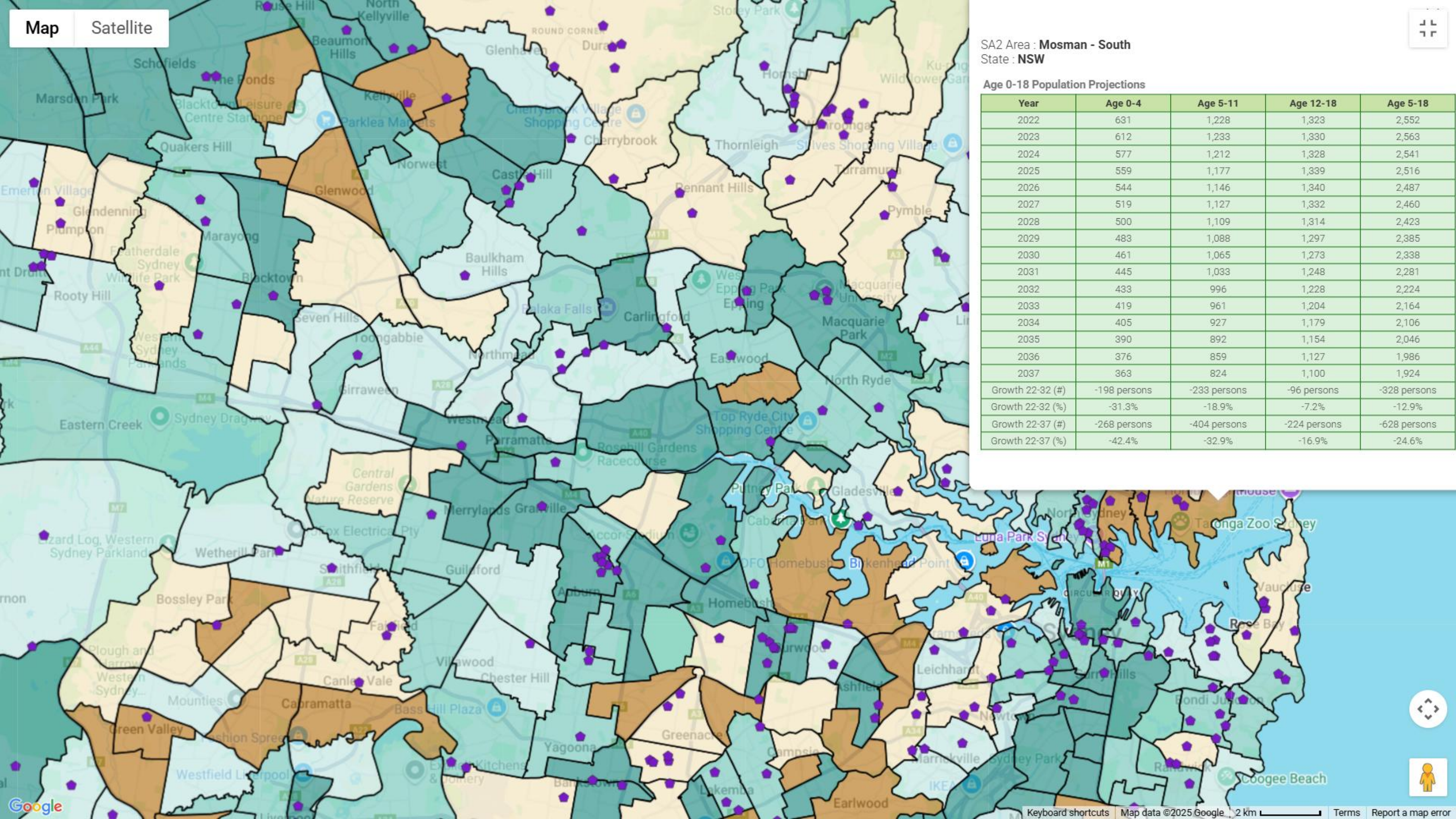
Age 0-18 Population Projections

Year	Age 0-4	Age 5-11	Age 12-18	Age 5-18
2022	4,861	7,690	6,566	14,255
2023	5,027	8,382	7,336	15,718
2024	5,172	9,090	8,072	17,162
2025	5,341	9,722	8,861	18,582
2026	5,510	10,348	9,628	19,976
2027	5,669	10,948	10,402	21,350
2028	5,871	11,447	11,152	22,600
2029	6,067	11,916	11,901	23,818
2030	6,251	12,367	12,587	24,954
2031	6,443	12,781	13,262	26,043
2032	6,628	13,154	13,938	27,092
2033	6,817	13,552	14,665	28,217
2034	7,009	13,962	15,442	29,404
2035	7,200	14,373	16,255	30,628
2036	7,393	14,794	17,119	31,912
2037	7,585	15,217	18,027	33,244
Growth 22-32 (#)	+1,767 persons	+5,465 persons	+7,372 persons	+12,837 persons
Growth 22-32 (%)	+36.3%	+71.1%	+112.3%	+90%
Growth 22-37 (#)	+2,724 persons	+7,527 persons	+11,462 persons	+18,989 persons
Growth 22-37 (%)	+56%	+97.9%	+174.5%	+133.2%



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





	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%

NSW's growth

	Full Time Equivalent Enrolments								
NSW	2020	2021	2022	2023	2024	2020-2024	2021-2024	2022-2024	2023-2024
Catholic	217,359	220,562	223,543	227,115	230,896	6.23%	4.69%	3.29%	1.67%
Combined	10,413	12,678	13,514	15,182	15,790	51.64%	24.54%	16.84%	4.00%
Primary	119,101	118,679	119,491	120,856	122,472	2.83%	3.20%	2.50%	1.34%
Secondary	87,674	89,009	90,330	90,868	92,381	5.37%	3.79%	2.27%	1.67%
Special	171	195	208	209	253	47.95%	29.74%	21.63%	21.05%
Government	809,798	801,889	790,849	785,847	780,336	-3.64%	-2.69%	-1.33%	-0.70%
Combined	16,074	16,179	16,422	15,603	15,148	-5.76%	-6.37%	-7.76%	-2.92%
Primary	485,285	478,782	469,716	465,221	458,916	-5.43%	-4.15%	-2.30%	-1.36%
Secondary	302,659	301,057	298,682	298,825	299,946	-0.90%	-0.37%	0.42%	0.37%
Special	5,780	5,872	6,029	6,198	6,327	9.46%	7.75%	4.94%	2.08%
Independent	212,734	220,405	227,226	235,492	243,988	14.69%	10.70%	7.38%	3.61%
Combined	176,137	185,169	192,241	198,583	205,444	16.64%	10.95%	6.87%	3.46%
Primary	7,912	8,256	7,488	8,494	8,746	10.54%	5.93%	16.80%	2.96%
Secondary	22,487	21,840	22,121	22,645	23,052	2.51%	5.55%	4.21%	1.80%
Special	6,199	5,141	5,376	5,770	6,747	8.84%	31.25%	25.50%	16.92%
Grand Total	1,239,891	1,242,856	1,241,617	1,248,454	1,255,221	1.24%	0.99%	1.10%	0.54%

Acara data 2024 (released March 2025)

Can this continue?

ACT's growth

	Full Time Equivalent Enrolments								
ACT	2020	2021	2022	2023	2024	2020-2024	2021-2024	2022-2024	2023-2024
Catholic	14,395	14,675	14,810	14,866	15,016	4.31%	2.32%	1.39%	1.01%
Combined	0	0	0	0	0	0.00%	0.00%	0.00%	0.00%
Primary	8,749	8,841	8,811	8,850	8,949	2.28%	1.22%	1.56%	1.11%
Secondary	5,646	5,834	5,999	6,016	6,067	7.46%	3.99%	1.14%	0.85%
Special	0	0	0	0	0	0.00%	0.00%	0.00%	0.00%
Government	45,545	46,091	46,208	46,136	45,896	0.77%	-0.42%	-0.68%	-0.52%
Combined	8,907	8,941	8,794	9,043	9,073	1.86%	1.47%	3.16%	0.32%
Primary	22,505	22,828	22,912	22,260	21,853	-2.90%	-4.27%	-4.62%	-1.83%
Secondary	13,792	13,965	14,143	14,467	14,611	5.93%	4.62%	3.31%	1.00%
Special	340	357	360	366	360	6.01%	0.81%	0.17%	-1.53%
Independent	14,184	14,487	14,836	15,510	16,003	12.82%	10.47%	7.87%	3.17%
Combined	12,371	12,599	12,885	13,638	14,113	14.09%	12.02%	9.54%	3.48%
Primary	373	392	425	308	303	-18.77%	-22.70%	-28.71%	-1.62%
Secondary	1,385	1,427	1,444	1,477	1,488	7.42%	4.30%	3.05%	0.74%
Special	55	69	82	87	98	78.73%	42.46%	20.02%	12.86%
Grand Total	74,124	75,253	75,854	76,512	76,914	3.76%	2.21%	1.40%	0.53%

Acara data 2024 (released March 2025)

Can this continue?

How times have changed - Girl's school issue

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%

How times have changed - Girl's school issue – Melbourne example



Back in the 20th 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		

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 Sydney (Metro), ACT and Regional (incl Wollongong, Newcastle and Central Coast) here, we have data for ALL areas Australia wide.
- 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 604 921
- www.spectrumanalysis.com.au





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