

Future Student Population Trends

– Is your area running out of school aged children?



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Table of Contents

Future Student Population Trends – Is your area running out of school aged children? This White Paper explores notable trends of student populations around Australia based on different aspects including Australian total fertility rates, school location demographics, changing female employment over time, inner suburban versus outer suburban forecasts, school type preferences, funding of government schools, student spread in different socio-economic areas, additional campus locations, mergers and acquisitions, new migrant locations, housing approvals, single sex schools and co-educational schools and childcare demand and is suitable for early years education centres, schools, colleges and universities.

1. Introduction.....	3
2. Australian Total Fertility Rates.....	4
3. School Location Demographics.....	5
4. Changing Female Employment Over Time.....	7
5. Inner Suburban versus Outer Suburban Forecasts.....	8
6. School Type Preferences.....	11
7. Funding of Government Schools.....	12
8. Student Spread in Different Socio-Economic Areas.....	13
9. Additional Campus Locations.....	14
10. Mergers and Acquisitions.....	14
11. New Migrant Locations.....	15
12. Housing Approvals.....	16
13. Single Sex Schools and Co-Educational Schools.....	17
14. Childcare Demand.....	19
15. Summary.....	20
16. References.....	21

1. Introduction

Schools, colleges and universities across Australia are noticing significant shifts in relation to where their students are coming from. Some schools are at the point of needing to carefully assess their ongoing operational viability and make some difficult decisions.

This White Paper provides insights into the reasons behind these student population trends and indicates what data may be helpful to forecast future student population trends anywhere across Australia.

How quickly can your school, college or university respond to a significant change in your total student population?

At what point do you make difficult decisions like increasing class sizes or reducing staff numbers?

How can you forecast where your students may come from in the next two, five or 10 years or decide where you can go looking for more students?

Do you need to be more proactive when considering public and private transport options or do you need to approach your marketing with a different focus?

This White Paper will share practical insights into student population trends so that you can ultimately use facts and data to make better decisions for your school, college or university.

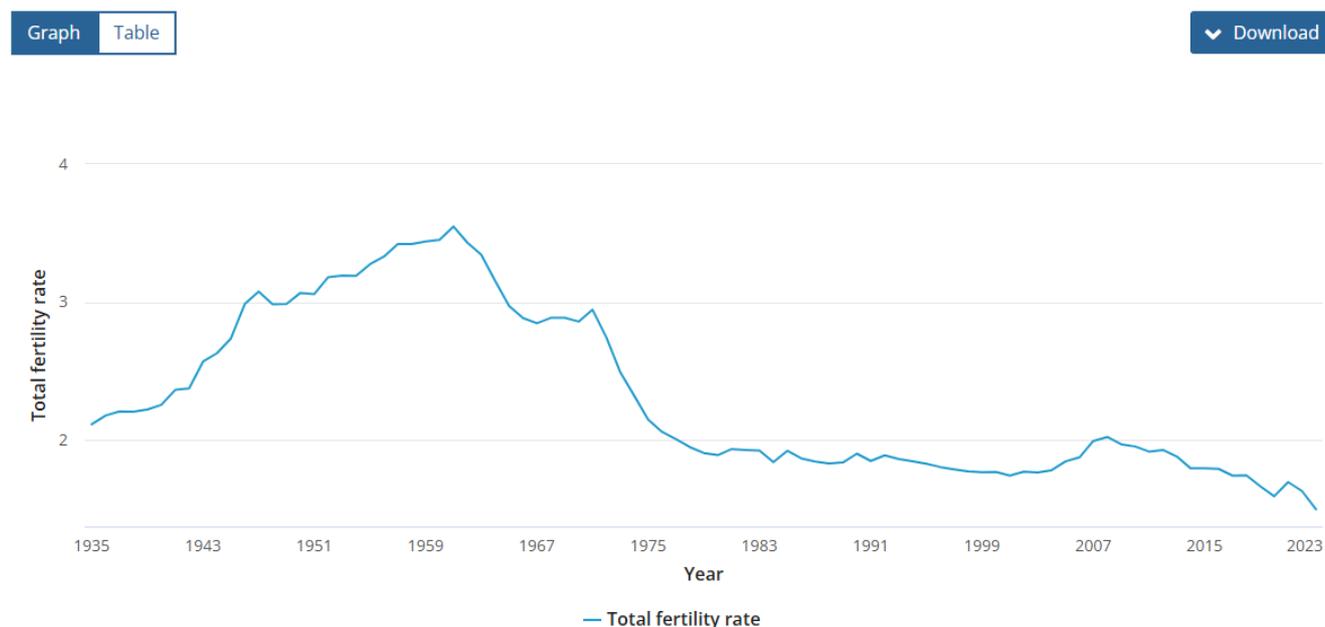
Notable Trends will be showcased at the end of each section.

2. Australian Total Fertility Rates

In 2001, Australia's population hit its lowest birth rate (Total Fertility Rate TFR) ever recorded (1.743).ⁱ The Baby Bonus Scheme was introduced in the 2002 Federal Budget delivered by Peter Costello with a goal to increase fertility rates and offset the peak of Australia's ageing population.

It worked. Australia's fertility rate grew to 2.023 by 2008. Unfortunately, when the Baby Bonus Scheme ended in 2014, the TFR had dropped back to 1.795.

Total fertility rate - 1935 to 2023



Source: ABS Birth rate continues to declineⁱⁱ

In 2024, the Total Fertility Rate declined to 1.48 and the highest percentage of births were to women aged 30 – 34 (105.2 babies per 1,000 women).

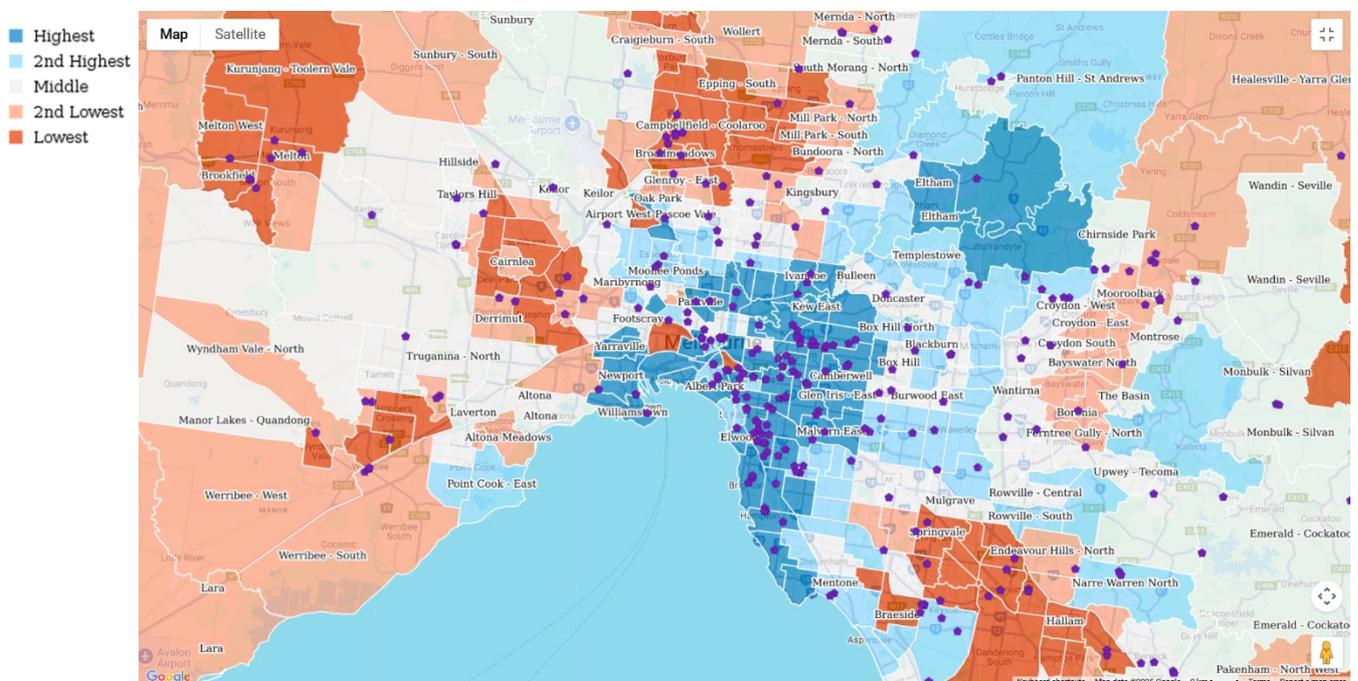
Since 2004, there has been a steady increase in mothers aged 35 – 39 and since 1993, the fertility rate of women aged 40 to 44 years has almost doubled (to 15.1 per 1,000 women).

Notable Trend Children born in 2008 are turning 18 in 2026, so they are either no longer part of the primary or secondary school population, or about to leave school very soon. With a significantly declining Total Fertility Rate and less children per mother, total student numbers are declining in many locations across Australia.

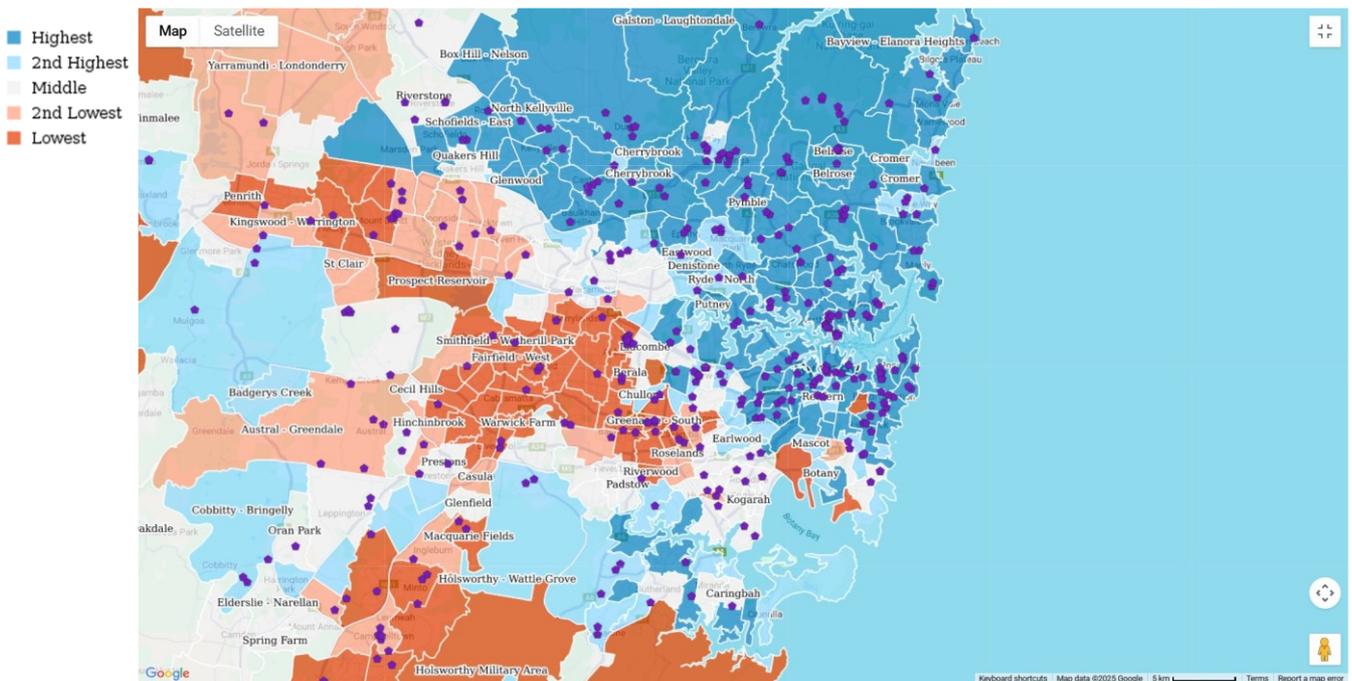
3. School Location Demographics

Our data mapping of Independent Schools shows that most higher fee schools in Australia are situated in the inner Eastern suburbs of our capital cities, especially in Sydney and Melbourne. Not surprisingly, these schools are in high socio-economic areas.

The Australian Bureau of Statistics (ABS) produces data on Socio Economic Index for Areas (SEIFA) as a way of comparing the socio economics of one area to another Australia wide.



Source: Spectrum Analysis Melbourne map of SEIFA Independent Schools as purple dots showing the concentration in high socio-economic areas.



Source: Spectrum Analysis Sydney map of SEIFA Independent Schools as purple dots showing the concentration in high socio-economic areas.

Statistically speaking, higher socio-economic areas have higher house prices and residents on a higher average household income.

Established areas are also likely to have an older average age demographic as ageing grandparents remain in their large houses much longer than they did in previous generations.

Back in 1993, life expectancy at birth was 75.0 years for males and 80.9 years for females and in 2023, that has increased to 81.1 for males and 85.1 for females.ⁱⁱⁱ

Statistical evidence also shows that higher demographic areas across Australia have lower fertility rates. In many cases, they also have a reducing population of school age children.

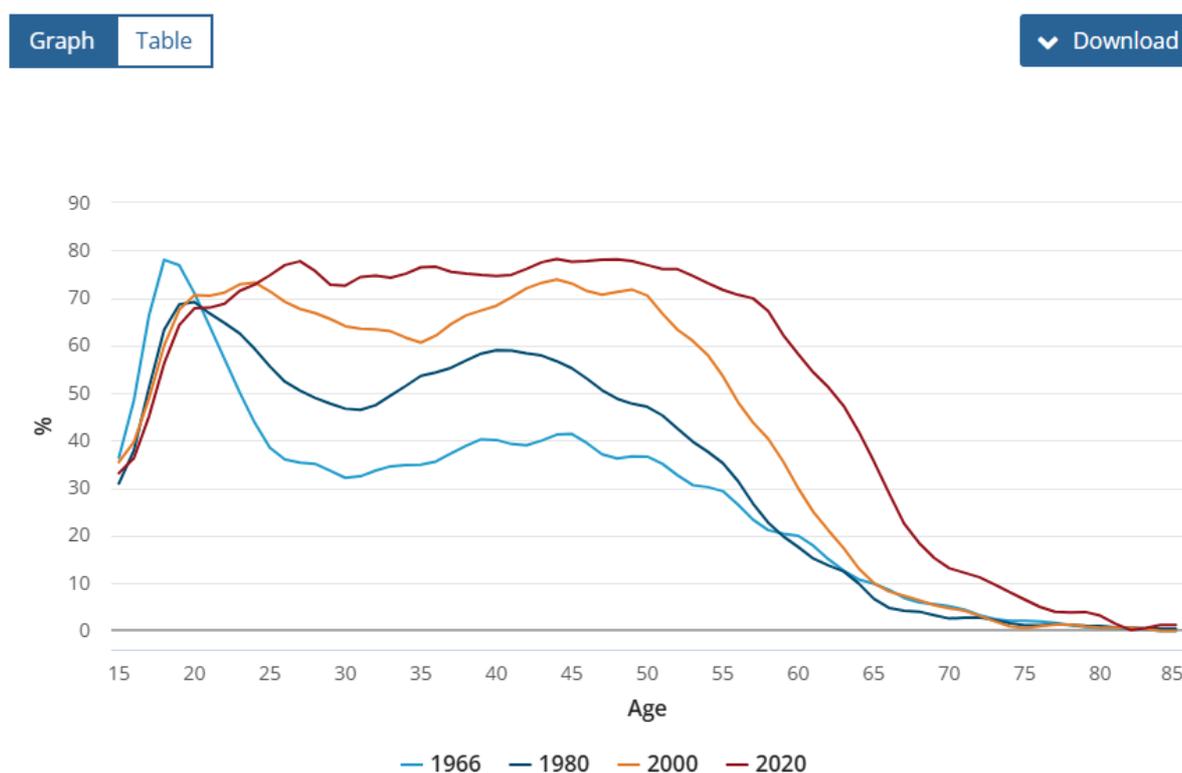
Notable Trend High socio-economic inner suburban areas have an ageing population, and older residents are less likely to leave large homes that would otherwise be suitable for growing families. Combining this with lower fertility rates in high socio-economic areas, we are seeing less school age children in the higher socio-economic areas.

4. Changing Female Employment Over Time

In 2020, 76.4% of 35 year old women in Australia were participating in the paid workforce, up from 34.9% in 1966. Also in 2020, women made up almost half of the paid workforce in Australia compared to around 30% in 1966.

This increase in participation is a result of changes in employment opportunities, greater access to paid parental leave, access to more flexible working arrangements and changes in the structure of the economy.^{iv}

Chart 1: Employment-to-Population ratio, Females, Original



Note: Estimates are as at November of each year. Series are smoothed using the 7-term Henderson moving average weights.

Source: Labour Force Survey

Source: ABS Changing female employment over time^v

Our research is showing that a higher percentage of women are employed in professional careers and would like to retain their career pathway throughout their child bearing years.

Overall, women are having children at a later age and less children in total. Families with two financial contributors are also looking for childcare prior to their children attending primary school.

Notable Trend There is a significant increase in women’s participation in the workforce which means that many families require childcare options before their child attends primary school.

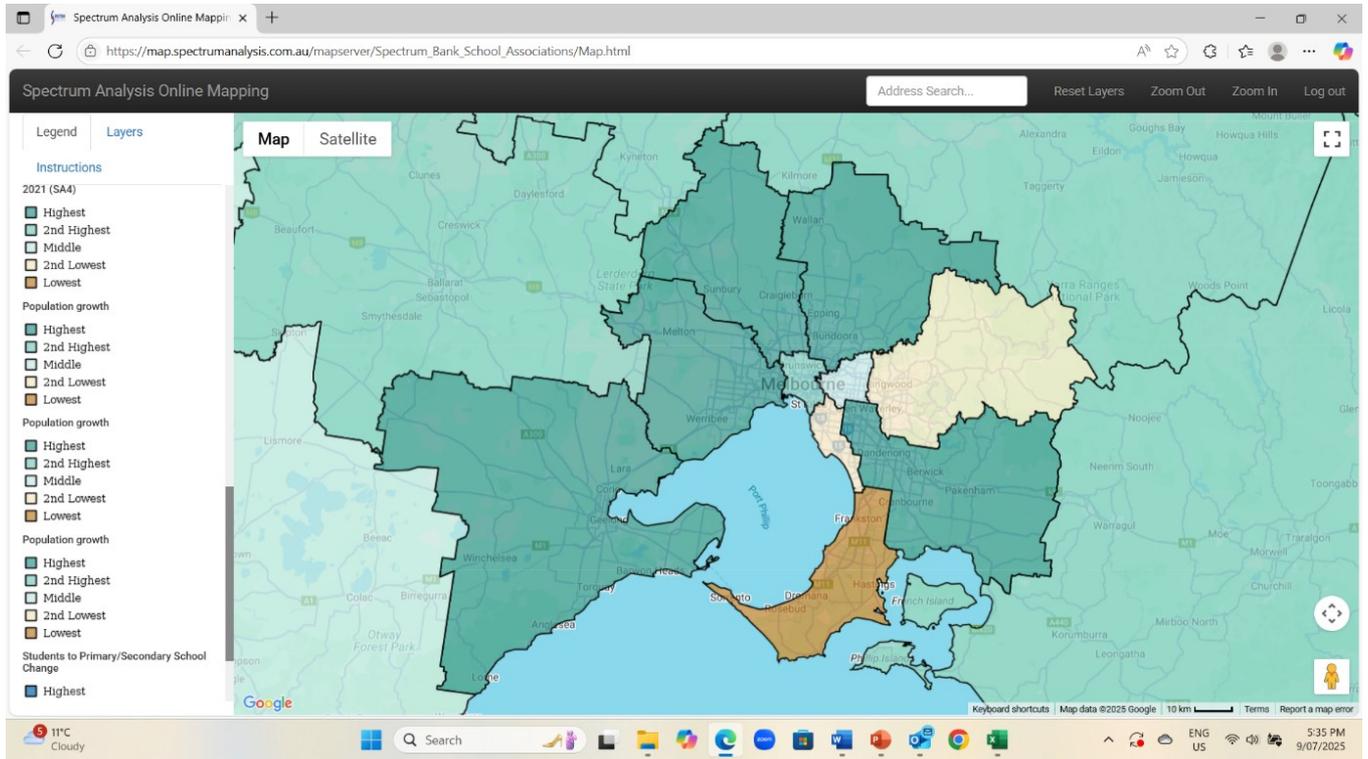
5. Inner Suburban versus Outer Suburban Forecasts

We are noticing a much higher Total Fertility Rate (TFR) in outer suburban areas than inner suburban areas, and this is reducing in every SA4 across Melbourne.

The Total Fertility Rate (TFR) is the average number of children a woman would have in her lifetime if she were to experience the current age-specific fertility rates throughout her reproductive years (typically 15 to 49).

Location	Total Fertility Rate 2014	Total Fertility Rate 2024
Melbourne Inner	1.15	0.8
Melbourne Inner East	1.46	1.1
Melbourne Inner South	1.66	1.3
Melbourne North East	1.89	1.6
Melbourne North West	2.04	1.8
Melbourne South East	1.91	1.6
Melbourne Outer East	1.81	1.5
Melbourne West	2.05	1.8
Mornington Peninsula	1.99	1.8

Source: Spectrum Analysis Mapping and ABS Data from 2024



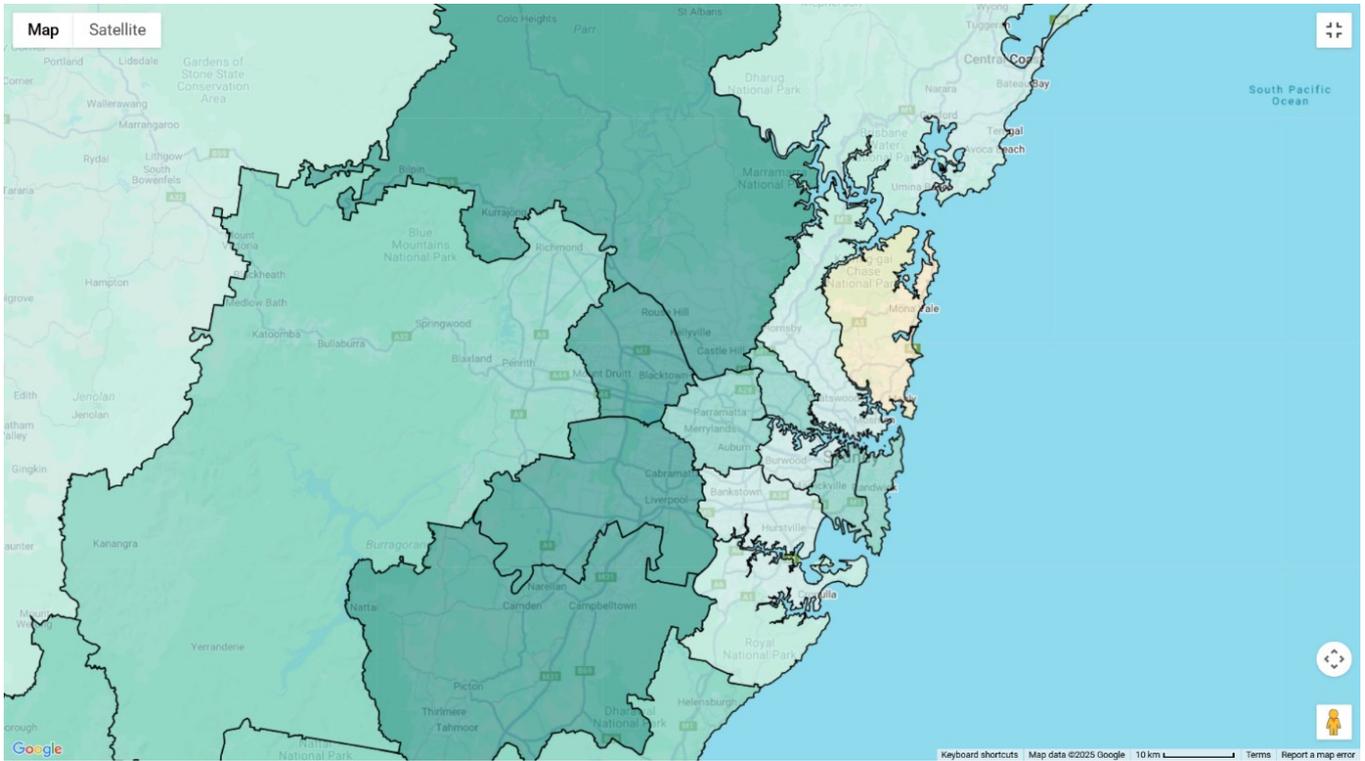
Source: Spectrum Analysis Mapping and ABS Data from 2024

When we look at Melbourne for example, we can see the areas of high growth for children aged 5 – 18 (dark green) through to negative growth (brown).

The numbers show:

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	

Source: Spectrum Analysis Mapping and ABS Data from 2024



Source: Spectrum Analysis Mapping and ABS Data from 2024

A very similar trend is occurring in Sydney. The numbers show:

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%

Notable Trend There is a significant difference in TFR between inner and outer suburban areas in capital cities and this needs to be considered when thinking about the total number of students available within a school's local area.

Higher socio-economic inner areas have decreasing numbers of school age children whilst the outer metropolitan growth areas have increasing numbers of school age children.

6. School Type Preferences

ACARA data summarises the number of students attending Government, Catholic or Independent schools from 2008 to 2024 and it shows that there has been a significant movement away from Catholic and Government schools to Independent schools over these 16 years.

Firstly, from 2008 to 2020, Catholic schools dropped 0.8%, Government schools dropped 0.1% and Independent schools increased 0.9%.

But from 2020 – 2024, there was a significant change that we believe was accelerated by COVID in 2020. In this time period, Government schools dropped by 2.3%, Catholic schools increased by 0.4% and Independent schools increased by 1.9%.

Of particular note, the Independent system has increased total student numbers by 43.4% from 2008 – 2024.

School Enrolment Statistics (2008–2024)

School Type	2008 Students	2008 %	2013 Students	2013 %	2020 Students	2020 %	2024 Students	2024 %	% Change 2008–2024
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%

Source: ACARA data showing changes in total student numbers and percentage % by School Type 2008–2024.

School Type	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%

Source: ACARA data showing changes in student % numbers by School Type 2008 – 2024.

We have observed Independent schools flourishing in good economic times and retreating during a recession when parents need to source lower cost education for their children.

Fortunately, Australia has not had a recession since 1991^{vi}, but the recent increase in inflation has seen school fees rise, mostly due to the cost of staff salaries and payroll tax^{vii}.

Schools need to be aware that a sudden change in economic certainty can make a significant difference to existing enrolments. We are aware of one school that budgets for a significant revenue drop every seven years and has developed contingency plans and allocated reserve funds to allow for this possibility.

Notable Trend There has been a significant increase in enrolments in Independent Schools from 2008 to 2024 and this could directly affect future enrolments in Catholic and Government schools. Likewise, schools need to plan for a sudden change in economic certainty and have contingency plans in place and additional funds on standby.

7. Funding of Government Schools

The Better and Fairer Schools Agreement (2025–2034) is a joint agreement between the Commonwealth, States and Territories to help create a better and fairer education system for all students.

Under the Full and Fair Funding Agreement, the Commonwealth has increased its contribution to 25 per cent of the Schooling Resource Standard (SRS) to put government schools on a pathway to 100 per cent of funding over the life of the agreement.

This is subject to states and territories maintaining a share of at least 75 per cent of the SRS for public schools^{viii}.

We have noticed that State Schools are often spending this additional funding on improving school facilities, particularly in the area of capital works. Interestingly, families choose a school on a variety of factors and the 'Range and quality of school facilities' is ranked at 49% compared to academic performance of the school at 47% according to the 2023 School Insights Report by Edstart^{ix}.

This means that local families may be well aware of the new upgrades at their local government schools and consider these improvements comparable to the facilities at a Catholic or Independent School. Lower fee Independent Schools may also benefit from this redistribution of funding.

Notable Trend The Better and Fairer Schools Agreement is improving the education system for all students and this may create a movement towards government schools in the future.

8. Student Spread in Different Socio-Economic Areas

Spectrum Analysis recently analysed a group of 10 schools with over 10,000 students in the high socio-economic Inner Eastern suburbs of Melbourne and looked at what percentage of students were located within concentric rings around the school.

The results showed that 50% of the students lived within a 4 kilometre radius of the school, and 70% lived within a 7 kilometre radius of the school.

We also analysed 16 school campuses and over 13,000 students in Middle and Outer Melbourne suburbs and 38% lived within a 4 kilometre radius and 24% lived more than 10 kilometres away.

Notable Trend With the Total Fertility Rate dropping from 1.50 in 2013 to 1.08 in 2023 in higher socio-economic areas, schools in these areas need to attract students living further away and consider providing transport options from specific pockets of growth.

9. Additional Campus Locations

Spectrum Analysis has provided data analysis services to a number of schools considering additional campus locations in high student growth areas. In Melbourne specifically, there is only a 7.6% increase in projected total population growth from 2026 – 2036 in the Melbourne Inner East area compared to a 29% increase in the Melbourne West area.

Projected Population Growth	2026 - 2036	2026 - 2036
Melbourne Inner East	+30,497	+7.6%
Melbourne Inner South	+27,022	+6.0%
Melbourne West	+291,813	+29.0%
Melbourne South East	+200,001	+20.4%

Source: Spectrum Analysis ABS Data 2026 - 2036

Schools could therefore consider new campuses in areas such as Melbourne’s West, North West, and South East to align with rising school-age populations so that they can maintain long-term growth.

Notable Trend Selected schools are considering additional campus locations in areas of higher projected population growth within their own state and in other Australian states and territories.

10. Mergers and Acquisitions

In recent years we have seen mergers and acquisitions occurring when schools have not been able to maintain their financial viability after significant changes in their day-to-day operations.

These schools have generally not adapted quickly enough to:

- a reduction in enrolments due to a saturated school market
- rising expectations of parents in the local area
- sophisticated marketing and promotion of nearby schools

For example, there is a high number of Independent and Catholic schools in Melbourne's Inner East (28 Catholic, 30 Independent) and Inner South (36 Catholic, 37 Independent) but there is also slower growth and lower fertility rates in these areas.

Outer regions are less saturated with Independent and Catholic schools relative to higher projected growth in student populations.

Notable Trend Schools are at risk of mergers and acquisitions if they are unable to quickly adapt their financial and staffing management practices when there is a decrease in enrolments or a significant change in market conditions.

11. New Migrant Locations

Spectrum Analysis can identify areas where there are higher proportions of new migrant families and many of these families have a higher fertility rate.

Young international students and couples may be prepared to live in higher density housing close to or in the CBD of capital cities when children are born, but many families look for a larger residence and a backyard as the children grow older and the most affordable options are in the outer suburban regions in lower socio-economic areas.

This partly accounts for the higher Total Fertility Rate TFR in these areas. However, these new migrants may also be interested in a specific type of Independent School – for example, an Islamic School. Spectrum Analysis has helped new arrival communities with selecting new school locations.

Overseas migration - Australia - year ending			
Year Ending	Migrant arrivals	Migrant departures	Net overseas migration
Dec-14	458,760	276,410	182,350
Dec-15	473,250	286,520	186,730
Dec-16	519,650	275,820	243,830
Dec-17	531,370	289,710	241,660
Dec-18	534,400	282,180	252,220
Dec-19	607,870	360,250	247,620
Dec-20	235,350	240,320	-4,970
Dec-21	214,410	205,100	9,300
Dec-22	651,350	213,500	437,860
Dec-23	739,030	208,410	530,620
Dec-24	593,540	263,610	329,940

Source: Australian Bureau of Statistics

According to the latest Treasurer’s Intergenerational Report of 2023, the long-term net migration rate is forecast at 235,000 persons per annum for the foreseeable future.

Notable Trend Higher fertility rate migrants of child bearing age are typically moving to outer suburban areas and may be specifically interested in a particular type of Independent School and these markets may be under-served at present.

12. Housing Approvals

The National Housing Accord is bringing together all levels of government, industry and investors to unlock housing supply and has set a national target of 1.2 million new, well-located homes over five years^x.

However, apartment approvals have significantly decreased over the last 10 years. Approvals for detached houses have risen 6.1% compared to 2024.

Western Australia, South Australia and Queensland are leading the charge with increases of 29.2%, 27.5% and 13.9% respectively. NSW and Victoria have declined by 9.5% and 0.9%^{xi}.

Schools in areas where detached houses can be approved and built are likely to see an increase in student populations, especially if the future residents access additional programs like the Help to Buy program that helps Australians buy homes with lower deposits and smaller mortgages.

Notable Trend With the Federal Government's focus on increasing housing supply across Australia, areas receiving more Housing Approvals are likely to see an increase in the student population.

13. Single Sex Schools and Co-Educational Schools

Prior to the year 2000, there were 20 APS and AGS schools, all exclusively boys' schools in Melbourne. At the same time there were similar numbers of all girls' schools.

Parents often wanted a single sex education, so it was quite normal to send your son/s to one school and your daughter/s to another school.

Over the last 40 years, 12 of these boys schools have now become co-educational including Carey Baptist Grammar, Penleigh Grammar, Essendon Grammar, Wesley Grammar, Caulfield Grammar, Ivanhoe Grammar, Yarra Valley Grammar, The Geelong College, Geelong Grammar, Assumption College, Haileybury, Mentone Grammar and Peninsula Grammar.

Eight are still boys schools including Camberwell Grammar, Scotch College, Melbourne Grammar (with a small number of girls), St Kevins College, Brighton Grammar, Trinity College, Marcellin College and Xavier College.

However, the numbers have changed.

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
Change	7.10%	46.60%	8.40%	23.29%

Source: ACARA Data 2024 – also note, one Melbourne school now has four campuses and four schools have two campuses

This data reveals some interesting insights. For 2008 – 2024, the boys' schools increased enrolments by 7.1%, and most of these schools consider they are near their maximum enrolments.

The Co-Educational schools have increased enrolments by 23.29%.

The numbers of boys at the Co-Educational schools increased by 8.4%, whilst the number of girls increased by 46.6% and these girls have most likely transferred from a single sex girls' school.

The other interesting insight is that in these 12 schools, they are still at 46.4% girls and 53.6% boys. This indicates the pressure the co-ed schools have been under to attract more girls as they aim to reach a 50 / 50 split.

The effect of this change towards co-educational schooling is placing more pressure on the all girls' schools. Many parents only want to deal with one school for ease of drop off's, a potential reduction in fees with a family discount and in most cases, these large co-educational schools have better facilities.

Many of the girl's schools in Melbourne are facing a bleak future as they struggle to maintain enough enrolments to remain functional in the future.

Whilst Melbourne schools Shelford Girls Grammar and Presentation College have both disappeared, one success story is Kilvington Grammar (previously an all girls' school) which went co-educational in 2011, and has grown from 385 students in 2011 to 758 in 2025. It is also interesting that they have 379 boys and 379 girls according to the 2025 ACARA data.

Notable Trend As single sex schools move towards co-educational schools, there is likely to be a significant disruption to enrolments of any single sex school close by.

14. Childcare Demand

There are now 17,773 Childcare and Early Learning Centres across Australia (according to the ACECQA data in 2026) and a total of 8,758 Primary Schools (including P – Y6 and P – Y12) and 2,281 Secondary Schools (Y7 – Y12).

With the recent media coverage of personal safety issues in private childcare services, there could be a trend towards parents seeking childcare that falls under ‘education’ regulation rather than ‘childcare’ regulation..

School Sector	School Type	Count
Catholic	Combined	171
Catholic	Primary	1,275
Catholic	Secondary	401
Government	Combined	903
Government	Primary	4,994
Government	Secondary	1,348
Independent	Combined	1,031
Independent	Primary	384
Independent	Secondary	532

Source: ACARA Data

Children in long day care are usually offered a ‘pre school’ program but we are receiving anecdotal reports that these programs are not preparing children for school the same way that stand alone pre schools and kindergartens do. If this information becomes more main stream, there may be an influx of parents seeking a higher educational component during their child’s early years.

We are also seeing an increase in Independent Schools providing onsite Early Learning Centres for a full K-12 student experience which also has the potential to secure longer term enrolments.

Notable Trend There is a significant rise in Independent Schools offering childcare and education from the age of three and now may be the time to consider this option for your school.

15. Summary

Spectrum Analysis looks at many different types of statistical data to help you and your school make informed fact-based decisions.

As you can see from this comprehensive White Paper and list of Notable Trends, there is a lot to consider when developing a long term strategic plan.

There is a comprehensive range of information, ebooks, publications, presentations and resources for early years education centres, schools, colleges and universities on the spectrumanalysis.com.au website.

You can subscribe to the free [email newsletter here](#).

You can see an online mapping demonstration for the fictitious [Jells College here](#).

You can follow Spectrum Analysis on social media by clicking on the icons below.

You can contact the author, Peter Buckingham directly via peterb@spectrumanalysis.com.au or [+61 411 604 921](tel:+61411604921) for a personal discussion or demographic overview related to your early years education centre, school, college or university.

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