

Changing Student Populations

Where will your students come from in the future?

Making data-based decisions for the development of your school

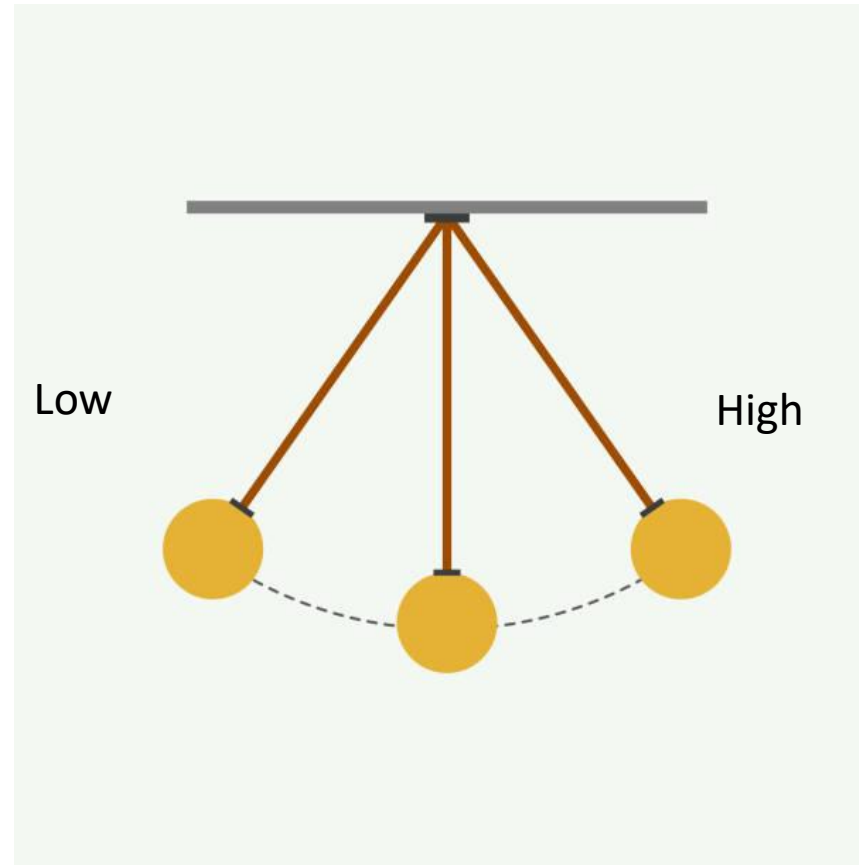


By Peter Buckingham
Co-Founder and Managing Director
Spectrum Analysis Australia

Thoughts for the day:

- Are you feeling there is more or less interest in enrolments at your school?
- How do you feel the pool of potential students is changing in your trade area?
- How should this effect your school's long-term plans?

The Pendulum keeps moving



My view is we are currently in a phase of **higher** than long term averages for enrolments in Independent and Catholic Secondary schools.

Maybe this is the new “norm”?

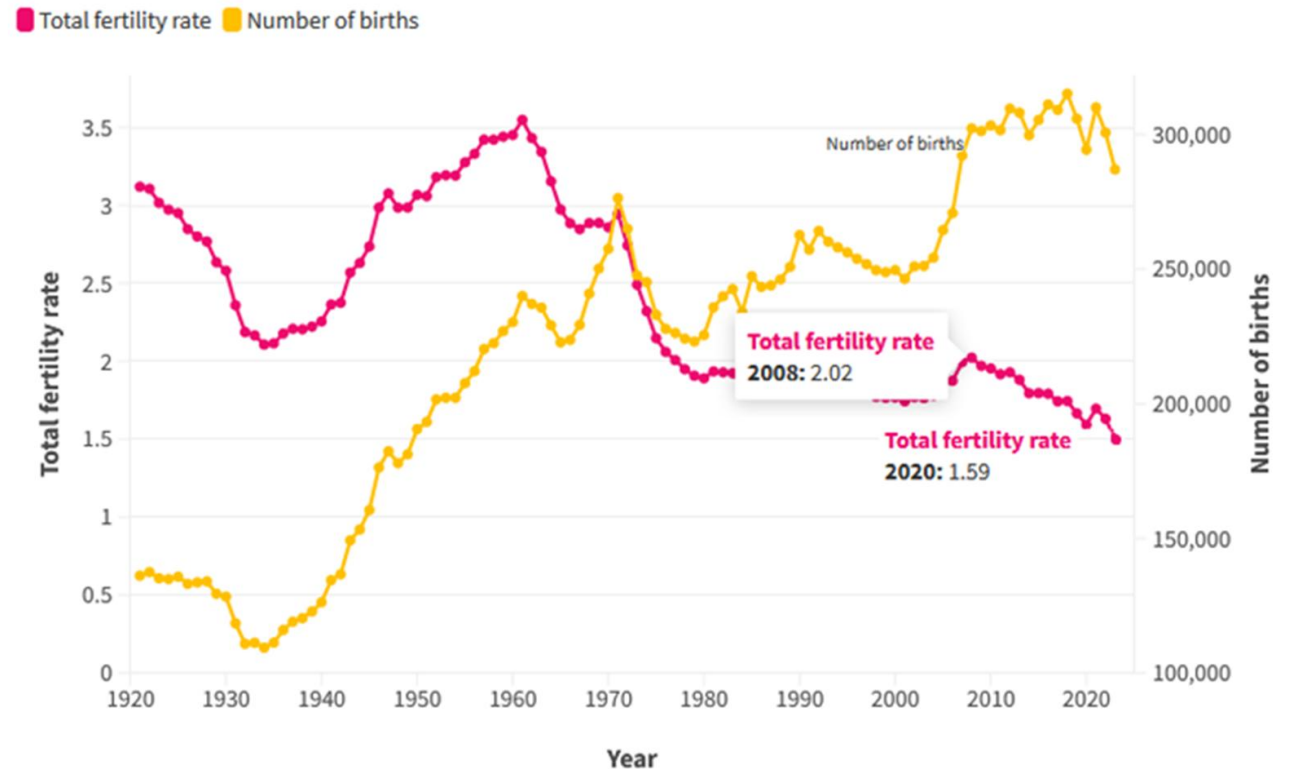
5 major factors affecting the pendulum

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



Australian Pop 1960 – 10M, 1970 – 12.5M, 2020 - 25.6M

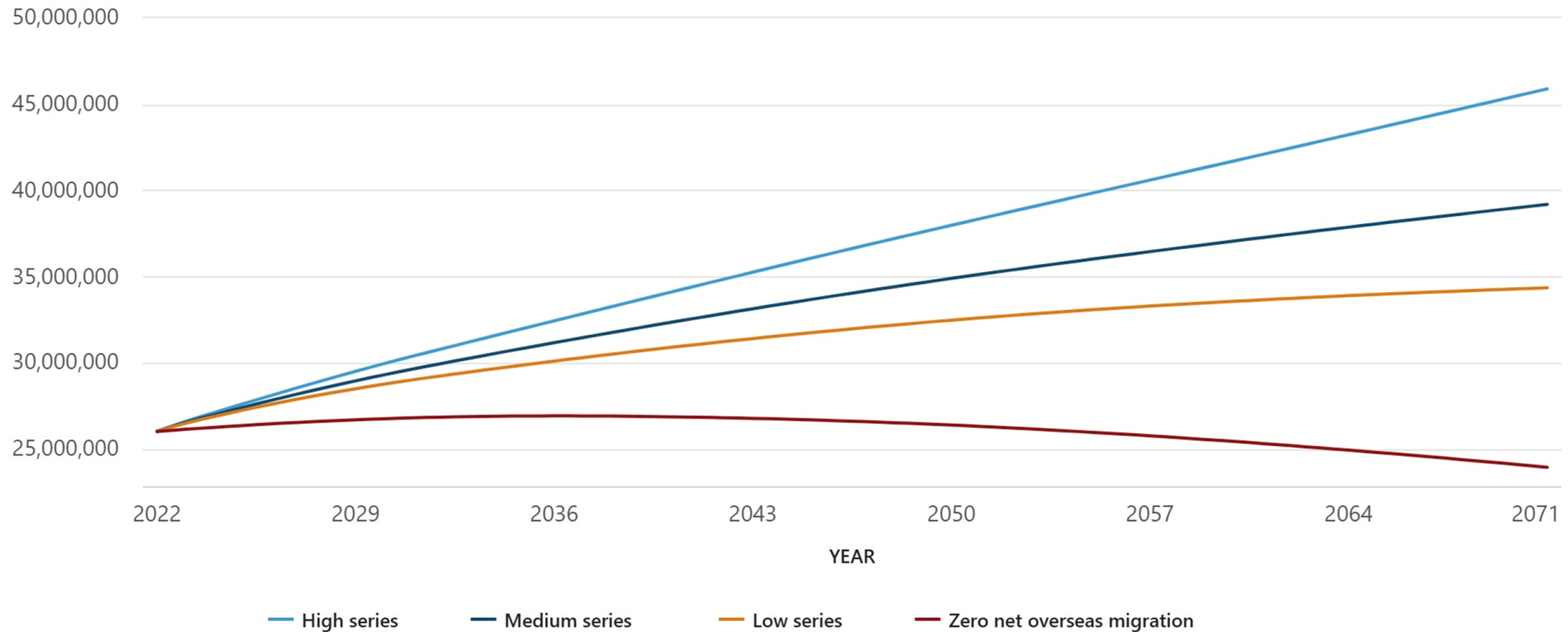
Overseas migration

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

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

Long term Australian population forecast

Projected population, Australia



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

Long term Australian population forecast

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

Statistical Areas - Australia wide

SA1's – 61,845

SA2's – 2,473

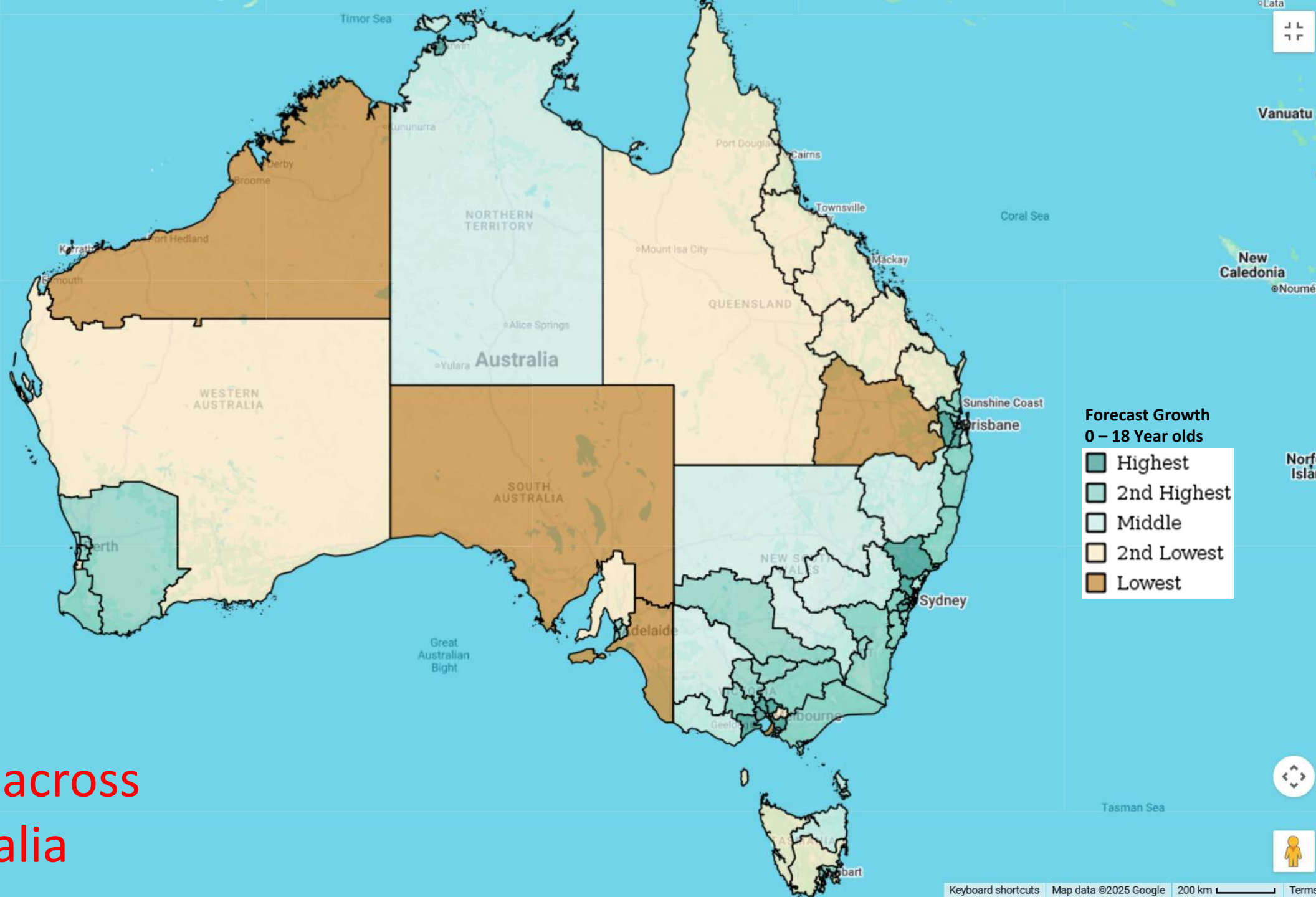
SA3's – 359

SA4's – 107

Suburbs - 15,760

Postcodes - 3,137

States and Territories – 6 + 2

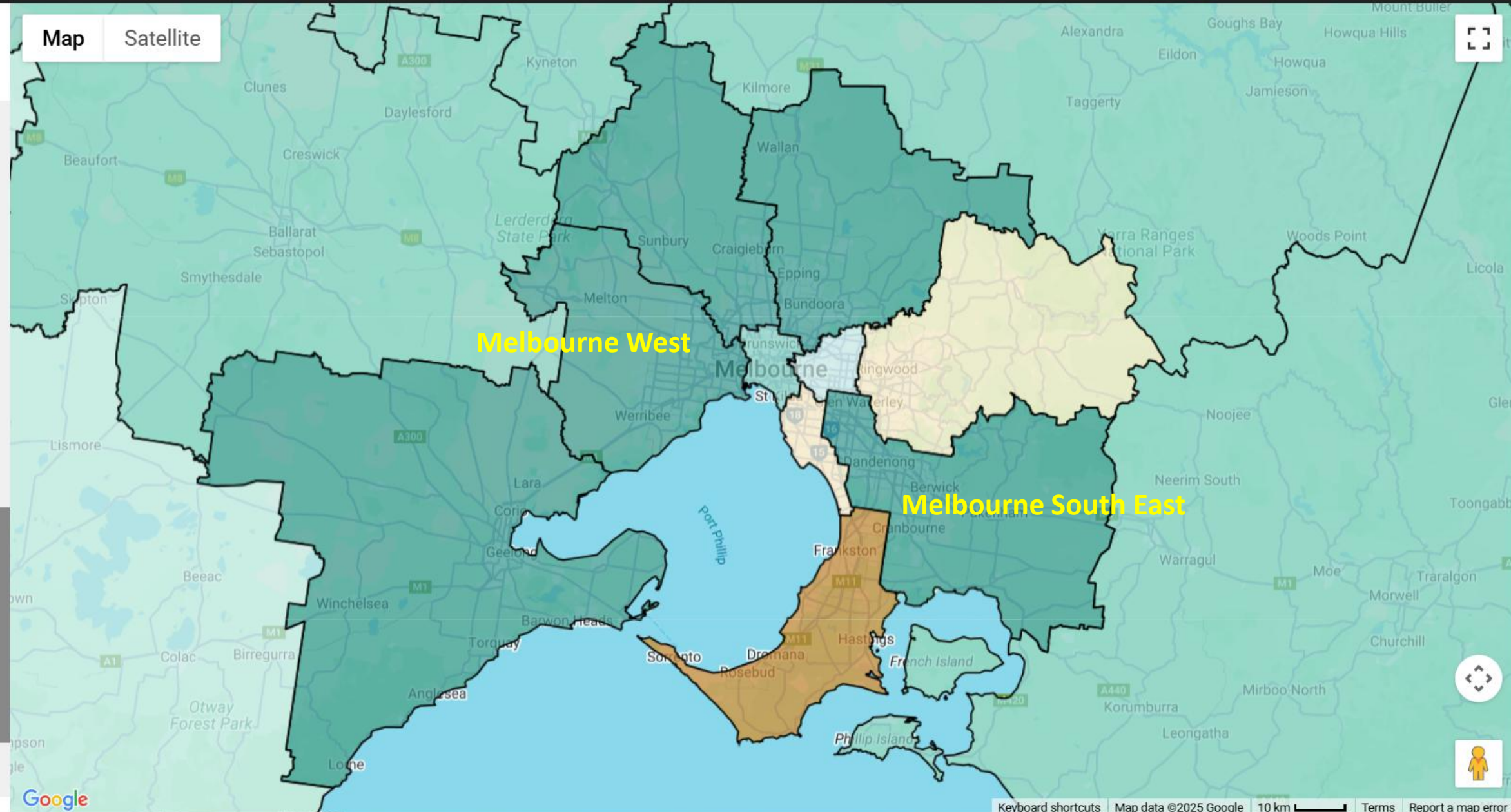


**Forecast Growth
0 – 18 Year olds**

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

SA4's across Australia

Map Satellite



Secondary School



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	

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
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	

Fertility Rates - 2024

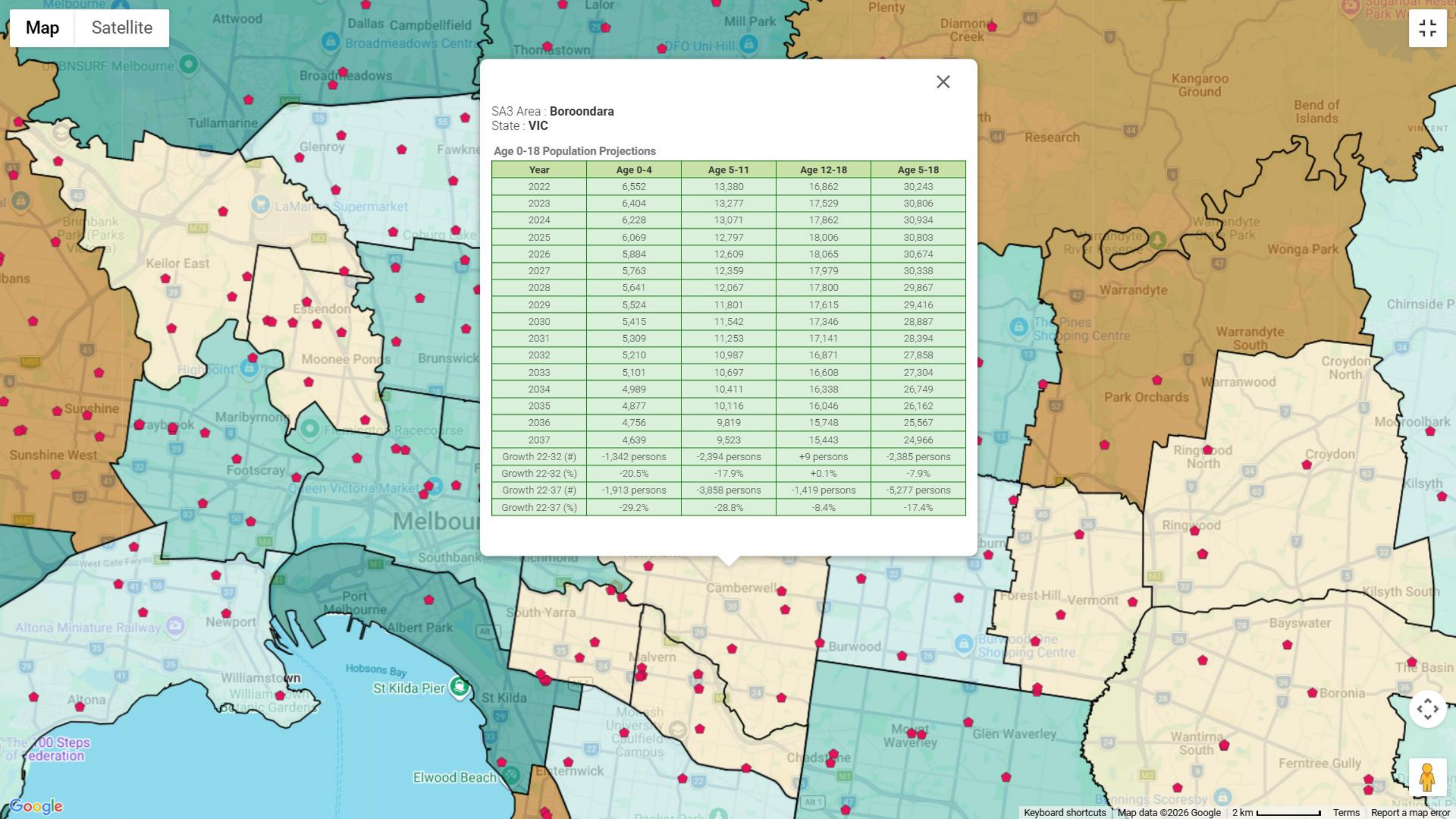
Melbourne - Inner	0.79
Melbourne - Inner East	1.05
Melbourne - Inner South	1.3
Melbourne - Outer East	1.52
Melbourne - North East	1.57
Melbourne - South East	1.6
Melbourne - West	1.75
Mornington Peninsula	1.76
Melbourne - North West	1.82

Ballarat	1.72
Bendigo	1.76
Geelong	1.76
Hume	1.88
Latrobe - Gippsland	1.95
North West	2.02
Shepparton	2.04
Warrnambool and South West	1.95

SA3 Area : **Boroondara**
 State : **VIC**

Age 0-18 Population Projections

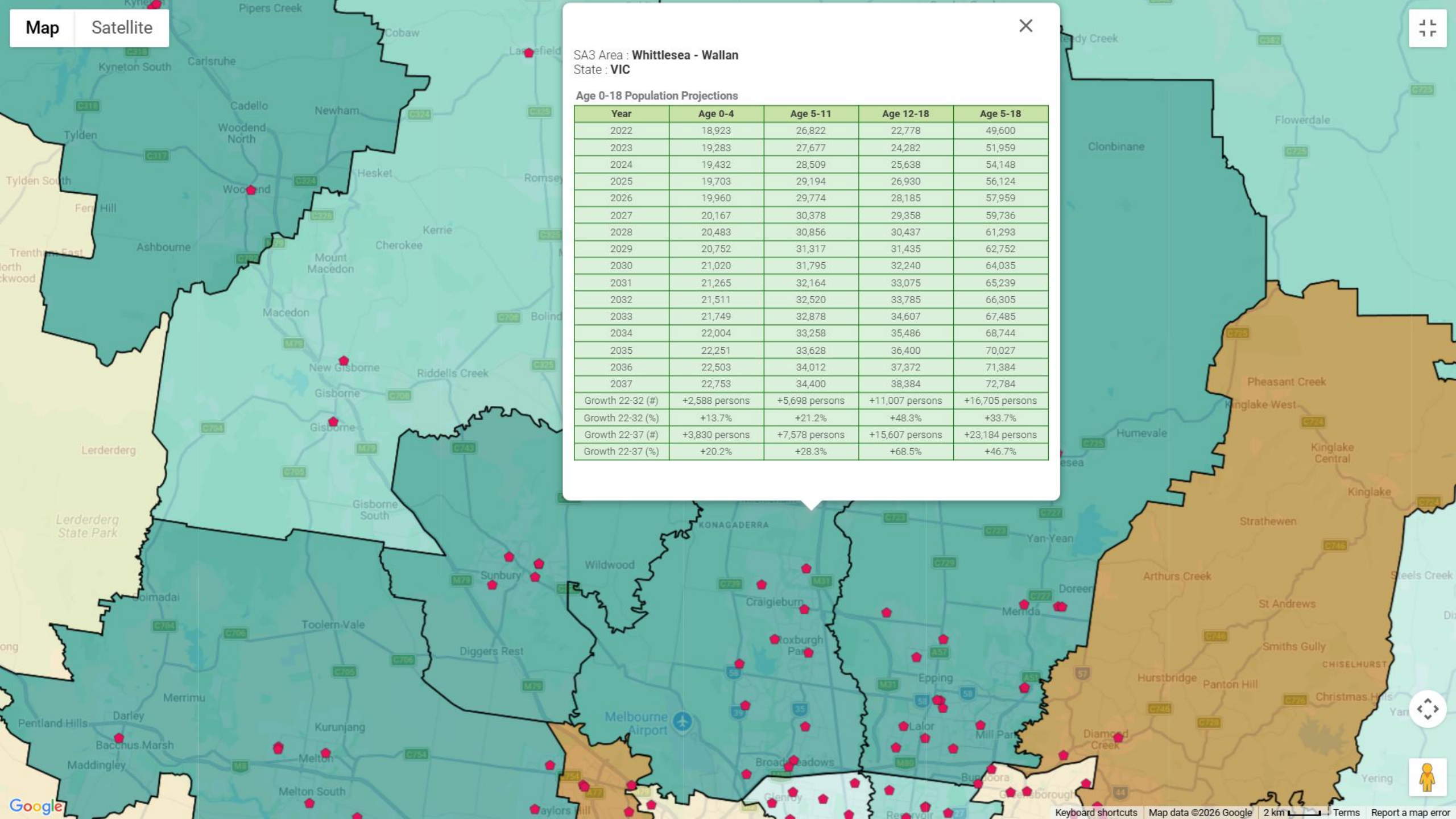
Year	Age 0-4	Age 5-11	Age 12-18	Age 5-18
2022	6,552	13,380	16,862	30,243
2023	6,404	13,277	17,529	30,806
2024	6,228	13,071	17,862	30,934
2025	6,069	12,797	18,006	30,803
2026	5,884	12,609	18,065	30,674
2027	5,763	12,359	17,979	30,338
2028	5,641	12,067	17,800	29,867
2029	5,524	11,801	17,615	29,416
2030	5,415	11,542	17,346	28,887
2031	5,309	11,253	17,141	28,394
2032	5,210	10,987	16,871	27,858
2033	5,101	10,697	16,608	27,304
2034	4,989	10,411	16,338	26,749
2035	4,877	10,116	16,046	26,162
2036	4,756	9,819	15,748	25,567
2037	4,639	9,523	15,443	24,966
Growth 22-32 (#)	-1,342 persons	-2,394 persons	+9 persons	-2,385 persons
Growth 22-32 (%)	-20.5%	-17.9%	+0.1%	-7.9%
Growth 22-37 (#)	-1,913 persons	-3,858 persons	-1,419 persons	-5,277 persons
Growth 22-37 (%)	-29.2%	-28.8%	-8.4%	-17.4%



SA3 Area : **Whittlesea - Wallan**
State : **VIC**

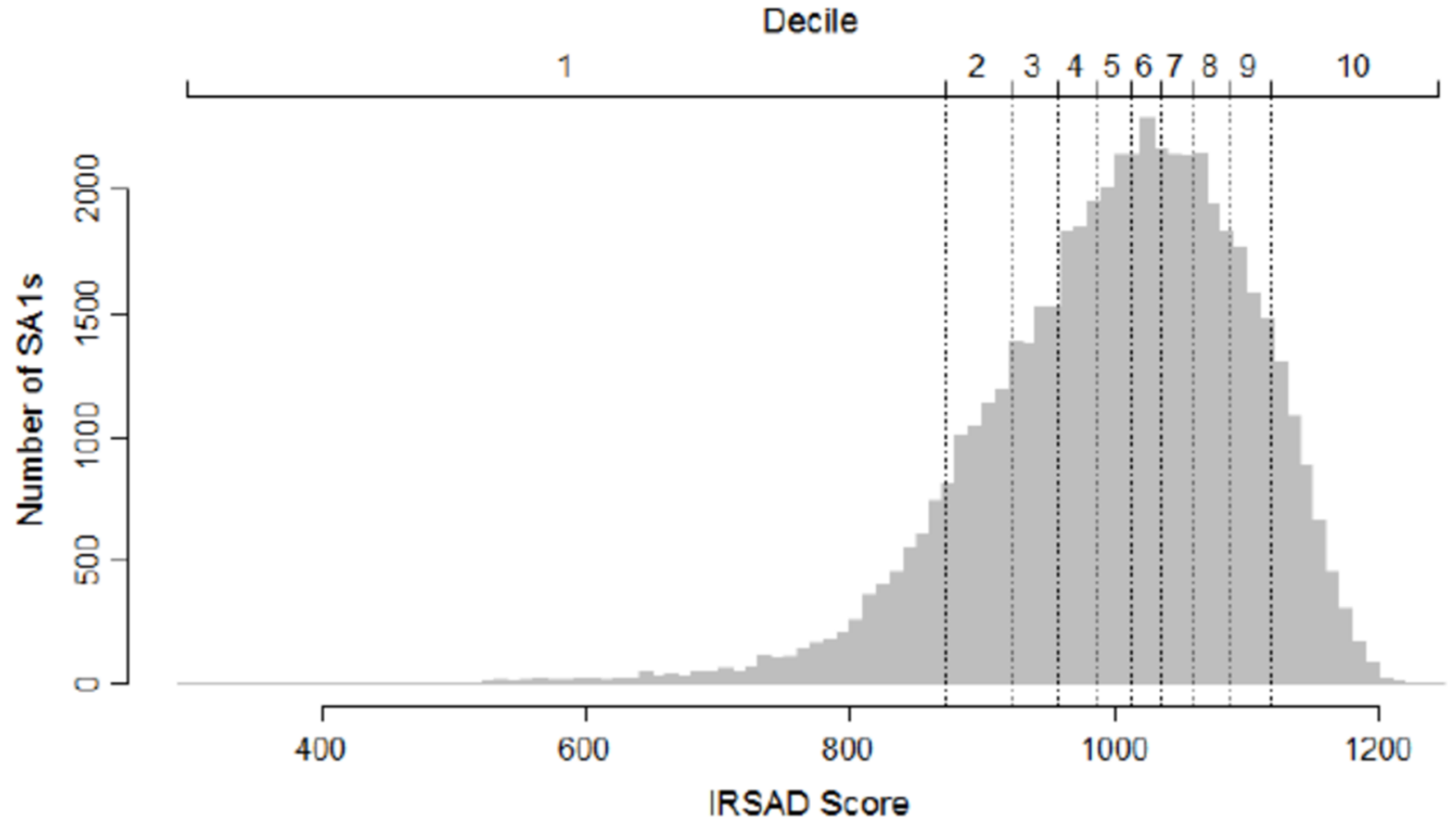
Age 0-18 Population Projections

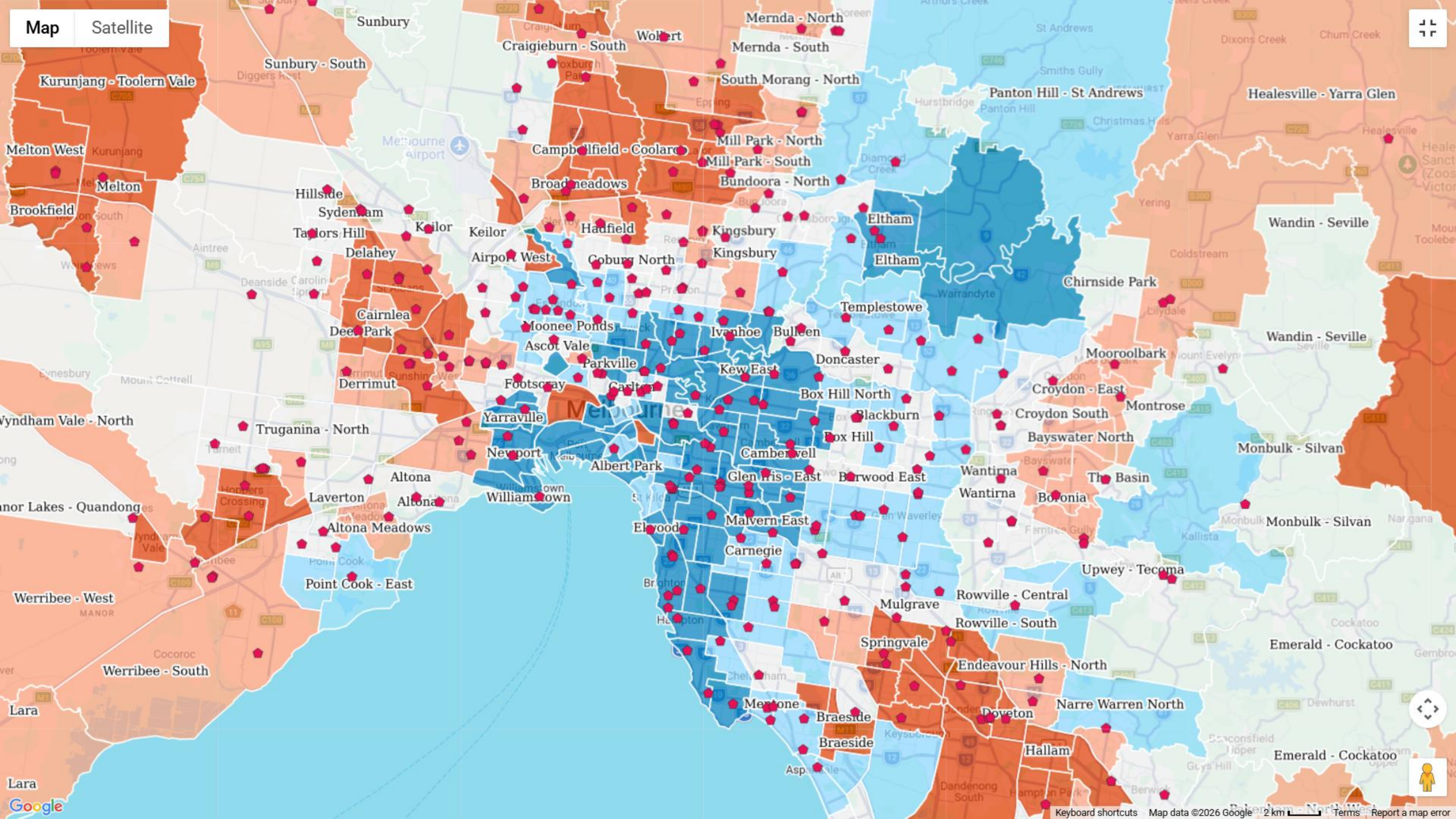
Year	Age 0-4	Age 5-11	Age 12-18	Age 5-18
2022	18,923	26,822	22,778	49,600
2023	19,283	27,677	24,282	51,959
2024	19,432	28,509	25,638	54,148
2025	19,703	29,194	26,930	56,124
2026	19,960	29,774	28,185	57,959
2027	20,167	30,378	29,358	59,736
2028	20,483	30,856	30,437	61,293
2029	20,752	31,317	31,435	62,752
2030	21,020	31,795	32,240	64,035
2031	21,265	32,164	33,075	65,239
2032	21,511	32,520	33,785	66,305
2033	21,749	32,878	34,607	67,485
2034	22,004	33,258	35,486	68,744
2035	22,251	33,628	36,400	70,027
2036	22,503	34,012	37,372	71,384
2037	22,753	34,400	38,384	72,784
Growth 22-32 (#)	+2,588 persons	+5,698 persons	+11,007 persons	+16,705 persons
Growth 22-32 (%)	+13.7%	+21.2%	+48.3%	+33.7%
Growth 22-37 (#)	+3,830 persons	+7,578 persons	+15,607 persons	+23,184 persons
Growth 22-37 (%)	+20.2%	+28.3%	+68.5%	+46.7%



SEIFA - Socio-Economic Index for Areas

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





ACARA data 2021 - 2025

AUSTRALIA						
Full Time Equivalent Enrolments						
						2021 - 2025
Year	2021	2022	2023	2024	2025	%
Catholic	732,861	741,677	754,326	767,275	778,070	6.17%
Combined	117,865	121,204	125,411	128,592	132,153	12.12%
Primary	354,138	355,079	357,210	360,838	362,798	2.45%
Secondary	260,858	265,394	271,705	277,845	283,119	8.53%
Government	2,664,019	2,648,047	2,656,416	2,662,203	2,657,034	-0.26%
Combined	236,450	240,530	242,116	242,588	241,442	2.11%
Primary	1,502,831	1,473,162	1,472,990	1,468,803	1,453,733	-3.27%
Secondary	924,738	934,355	941,310	950,812	961,859	4.01%
Independent	669,672	691,044	718,467	746,621	769,444	14.90%
Combined	552,422	570,105	591,668	614,075	631,812	14.37%
Primary	36,102	36,963	38,260	39,115	39,960	10.69%
Secondary	81,148	83,976	88,539	93,431	97,672	20.36%
Grand Total	4,066,552	4,080,768	4,129,209	4,176,099	4,204,548	3.39%

ACARA data 2021 – 2025 - Victoria

VICTORIA						
Full Time Equivalent Enrolments						
						2021 - 2025
Year	2021	2022	2023	2024	2025	%
Catholic	210,601	210,620	212,560	215,557	217,971	3.50%
Combined	14,859	14,885	15,063	15,228	15,391	3.58%
Primary	107,039	106,540	107,100	107,904	108,341	1.22%
Secondary	88,703	89,195	90,397	92,425	94,239	6.24%
Government	647,410	648,012	659,661	666,685	670,505	3.57%
Combined	75,101	77,375	79,588	79,887	79,571	5.95%
Primary	353,456	351,258	356,554	358,656	357,308	1.09%
Secondary	218,853	219,379	223,519	228,142	233,626	6.75%
Independent	153,818	158,648	166,153	173,025	179,138	16.46%
Combined	145,201	149,441	155,913	161,621	166,949	14.98%
Primary	3,335	3,440	3,680	3,920	4,054	21.56%
Secondary	5,282	5,767	6,560	7,484	8,135	54.01%
Grand Total	1,011,829	1,017,280	1,038,374	1,055,267	1,067,614	5.51%

Catholic Primary School – Doncaster East

YEAR	ENROLMENTS	CHANGE VS PREV. YEAR	CHANGE VS 2008
2025 Enrolments	60	-4.76%	-68.59%
2024 Enrolments	63	0%	-67.02%
2023 Enrolments	63	-16%	-67.02%
2022 Enrolments	75	-2.6%	-60.73%
2021 Enrolments	77	-3.75%	-59.69%
2020 Enrolments	80	-15.79%	-58.12%
2019 Enrolments	95	-27.48%	-50.26%
2018 Enrolments	131	-19.14%	-31.41%
2017 Enrolments	162	-15.62%	-15.18%
2016 Enrolments	192	-5.88%	0.52%
2015 Enrolments	204	-6.42%	6.81%
2014 Enrolments	218	7.39%	14.14%
2013 Enrolments	203	-1.46%	6.28%
2012 Enrolments	206	5.1%	7.85%
2011 Enrolments	196	7.1%	2.62%
2010 Enrolments	183	-8.5%	-4.19%
2009 Enrolments	200	4.71%	4.71%
2008 Enrolments	191	Base Year	0%

Catholic Primary School – Glowrey - Wollert

YEAR	ENROLMENTS	CHANGE VS PREV. YEAR	CHANGE VS 2008
2025 Enrolments	559	10.26%	Not Available
2024 Enrolments	507	13.68%	Not Available
2023 Enrolments	446	20.87%	Not Available
2022 Enrolments	369	23%	Not Available
2021 Enrolments	300	60.43%	Not Available
2020 Enrolments	187	78.1%	Not Available
2019 Enrolments	105	Not Available	Not Available
2018 Enrolments	0	Not Available	Not Available

How times have changed – Single sex vs Co-Ed

Calendar Year	2010
School Sector	Independent

Calendar Year	2024
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%

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 – Single sex vs Co-Ed

Melbourne experience

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
- Started with Geelong Grammar 1972 & Geelong College 1975.
- 8 are still Boys schools – Camberwell, Scotch, Melbourne Grammar (small number of girls), St Kevins, Brighton, Trinity, Marcellin & Xavier

How times have changed – Single sex vs Co-Ed

Year	Boys Schools	Co - Ed schools		
		Girls	Boys	Total
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 – Single sex vs Co-Ed

Year	Boys Schools	Co - Ed Schools		
		Boys	Girls	Total
1970	20		0	
2024	8		12	
2008	10,363 100%	9,175 39.0%	14,352 61.0%	23,527 100%
2024	11099 100%	13,448 46.4%	15,559 53.6%	29,007 100%
2008 - 2024	7.10%	46.60%	8.40%	23.2%

Kilvington Grammar – went Co-ed 2011

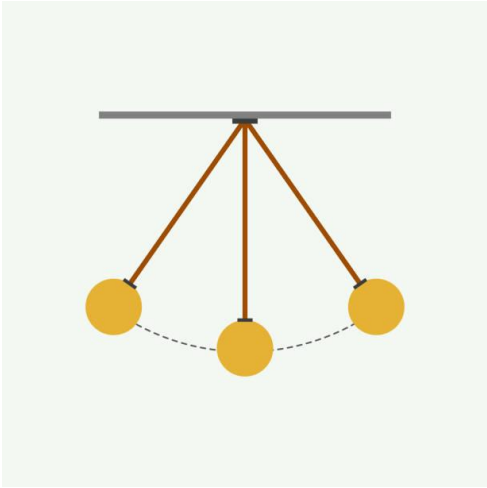
2025 TOTAL ENROLMENTS 758 GIRLS 379 BOYS 379

YEAR	ENROLMENTS	CHANGE VS PREV. YEAR	CHANGE VS 2008
2025 Enrolments	758	-0.13%	81.34%
2024 Enrolments	759	0.93%	81.58%
2023 Enrolments	752	-1.05%	79.9%
2022 Enrolments	760	0.8%	81.82%
2021 Enrolments	754	1.62%	80.38%
2020 Enrolments	742	0%	77.51%
2019 Enrolments	742	1.09%	77.51%
2018 Enrolments	734	1.52%	75.6%
2017 Enrolments	723	7.59%	72.97%
2016 Enrolments	672	11.07%	60.77%
2015 Enrolments	605	5.03%	44.74%
2014 Enrolments	576	15.66%	37.8%
2013 Enrolments	498	17.18%	19.14%
2012 Enrolments	425	10.39%	1.67%
2011 Enrolments	385	0.79%	-7.89

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 schools?

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 numbers 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 in Melbourne.
- Covid was probably good for Regional schools

Questions?



Examples

Information we can use to make the right
business decisions.

Publicly available data to understand

- 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)
 - Name or 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

Keep in touch



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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)

Mapping Demonstration

Imaginary Jells Park School on our website

<https://map.spectrumanalysis.com.au/mapserver/DemoJellsCollege/Map.html>