Independent Schools NSW

SPECTRUM ANALYSIS
Geodemographic Modelling & Analysis

Changing Student Populations

Where will your students come from in the future?

Making data-based decisions for the development of your schools



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

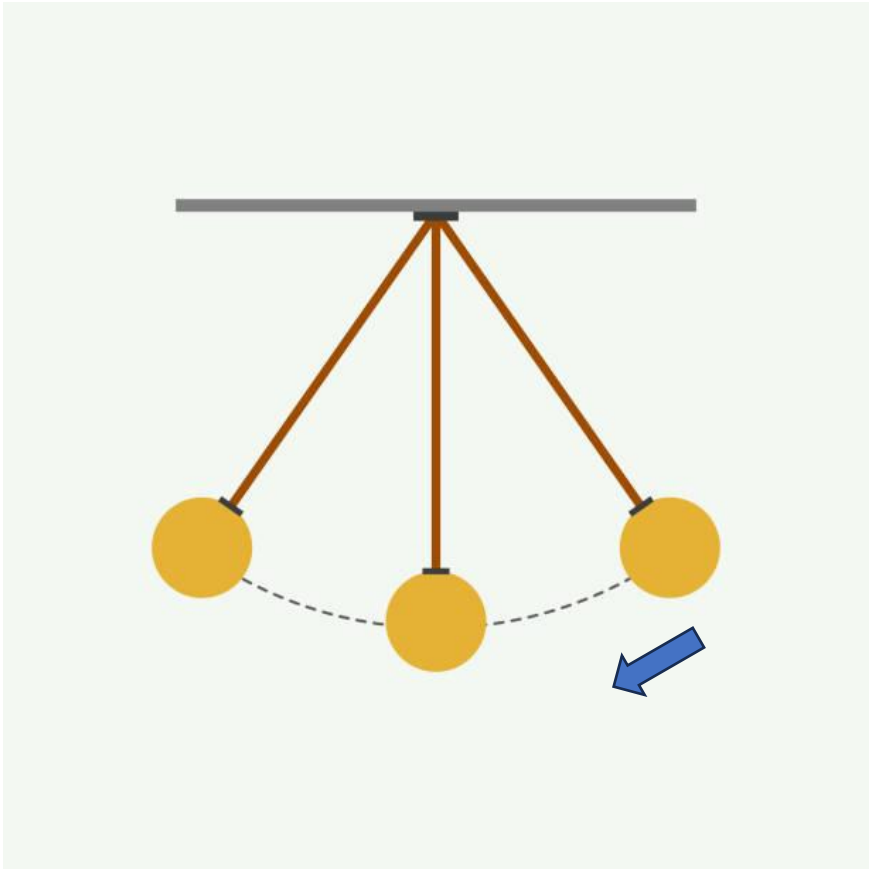
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Thoughts for the day:

- 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

Low



High

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”?

ACARA data 2020 – 2025 - Australia

	Full Time Equivalent Enrolments				
AUSTRALIA	**2020**	**2022**	**2024**	**2025**	**2020-2025**
Catholic	**725,815**	**742,217**	**766,473**	**777,917**	**7.18%**
Combined	110,878	123,947	139,354	146,288	31.94%
Primary	354,970	354,710	359,949	361,850	1.94%
Secondary	256,979	260,285	262,967	265,005	3.12%
Special	2,989	3,275	4,202	4,773	59.71%
Government	**2,643,597**	**2,619,520**	**2,632,284**	**2,626,166**	**-0.66%**
Combined	196,476	200,975	200,818	198,417	0.99%
Primary	1,500,380	1,457,758	1,452,635	1,437,108	-4.22%
Secondary	913,442	925,728	941,153	951,697	4.19%
Special	33,299	35,059	37,678	38,945	16.96%
Independent	**649,065**	**692,578**	**746,872**	**769,002**	**18.48%**
Combined	562,023	602,221	647,297	665,907	18.48%
Primary	28,779	29,099	30,444	30,057	4.44%
Secondary	44,667	46,566	49,848	51,739	15.83%
Special	13,595	14,693	19,284	21,299	56.67%
Grand Total	**4,018,477**	**4,054,315**	**4,145,629**	**4,173,085**	**3.85%**

ACARA data 2020 – 2025 - NSW

	Full Time Equivalent Enrolments				
NSW	**2020**	**2022**	**2024**	**2025**	**2020-2025**
Catholic	**217,359**	**223,543**	**230,896**	**233,410**	**7.38%**
Combined	10,413	13,514	15,790	16,401	57.50%
Primary	119,101	119,491	122,472	123,021	3.29%
Secondary	87,674	90,330	92,381	93,714	6.89%
Special	171	208	253	274	60.23%
Government	**809,798**	**790,849**	**780,336**	**773,377**	**-4.50%**
Combined	16,074	16,422	15,148	14,645	-8.89%
Primary	485,285	469,716	458,916	451,227	-7.02%
Secondary	302,659	298,682	299,946	301,075	-0.52%
Special	5,780	6,029	6,327	6,430	11.25%
Independent	**212,734**	**227,226**	**243,988**	**250,259**	**17.64%**
Combined	176,137	192,241	205,444	210,607	19.57%
Primary	7,912	7,488	8,746	8,799	11.22%
Secondary	22,487	22,121	23,052	23,498	4.49%
Special	6,199	5,376	6,747	7,356	18.66%
Grand Total	**1,239,891**	**1,241,617**	**1,255,221**	**1,257,046**	**1.38%**

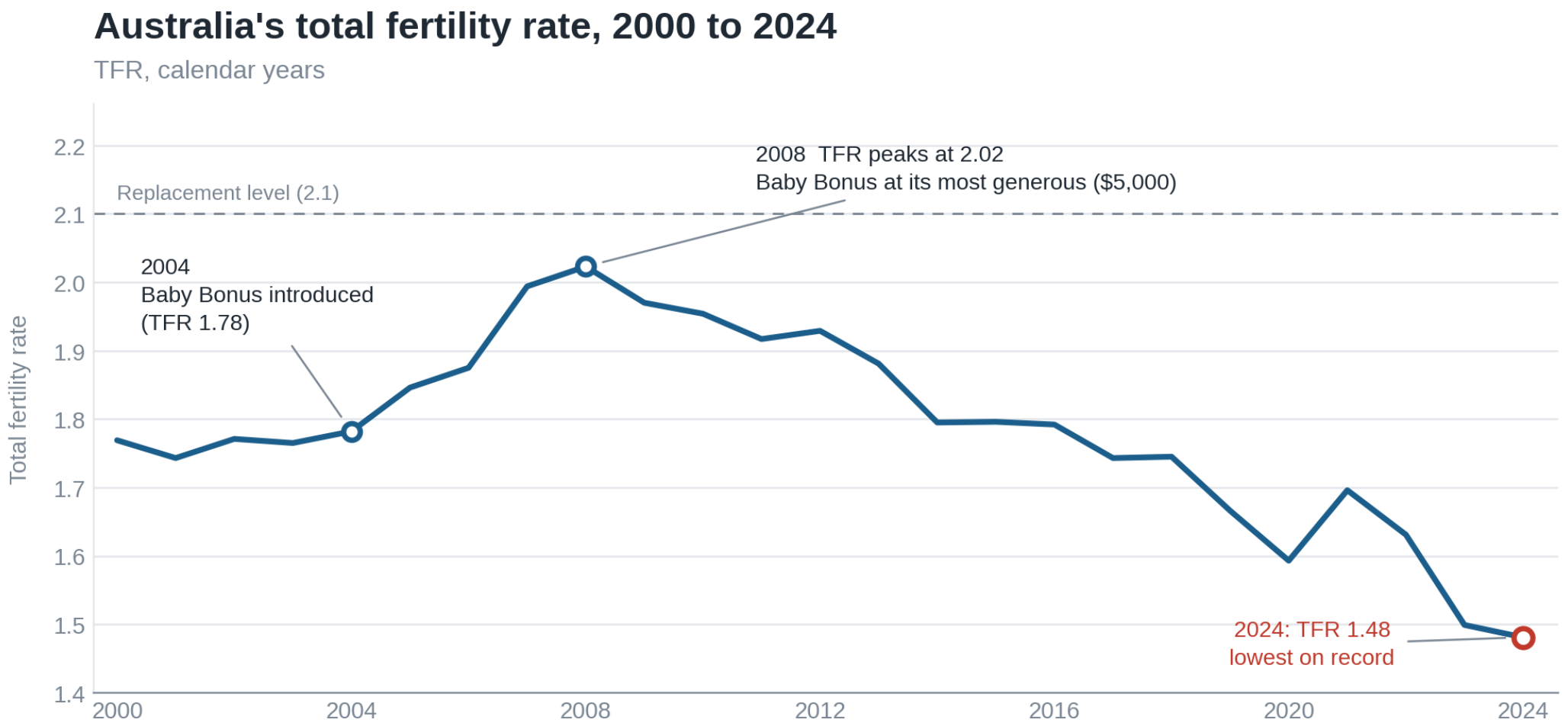
ACARA data 2020 – 2025 - ACT

	Full Time Equivalent Enrolments				
ACT	**2020**	**2022**	**2024**	**2025**	**2020-2025**
Catholic	**14,395**	**14,810**	**15,016**	**15,407**	**7.03%**
Combined	0	0	0	0	0.00%
Primary	8,749	8,811	8,949	9,237	5.58%
Secondary	5,646	5,999	6,067	6,170	9.27%
Special	0	0	0	0	0.00%
Government	**45,545**	**46,208**	**45,896**	**46,105**	1.23%
Combined	8,907	8,794	9,073	8,989	0.91%
Primary	22,505	22,912	21,853	21,671	-3.71%
Secondary	13,792	14,143	14,611	15,091	9.42%
Special	340	360	360	354	4.12%
Independent	**14,184**	**14,836**	**16,003**	**16,245**	**14.53%**
Combined	12,371	12,885	14,113	14,305	15.63%
Primary	373	425	303	324	-13.14%
Secondary	1,385	1,444	1,488	1,498	8.14%
Special	55	82	98	119	116.00%
Grand Total	**74,124**	**75,854**	**76,914**	**77,757**	**4.90%**

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).

Fertility Rate across Australia



Source: ABS, Births, Australia (total fertility rate).

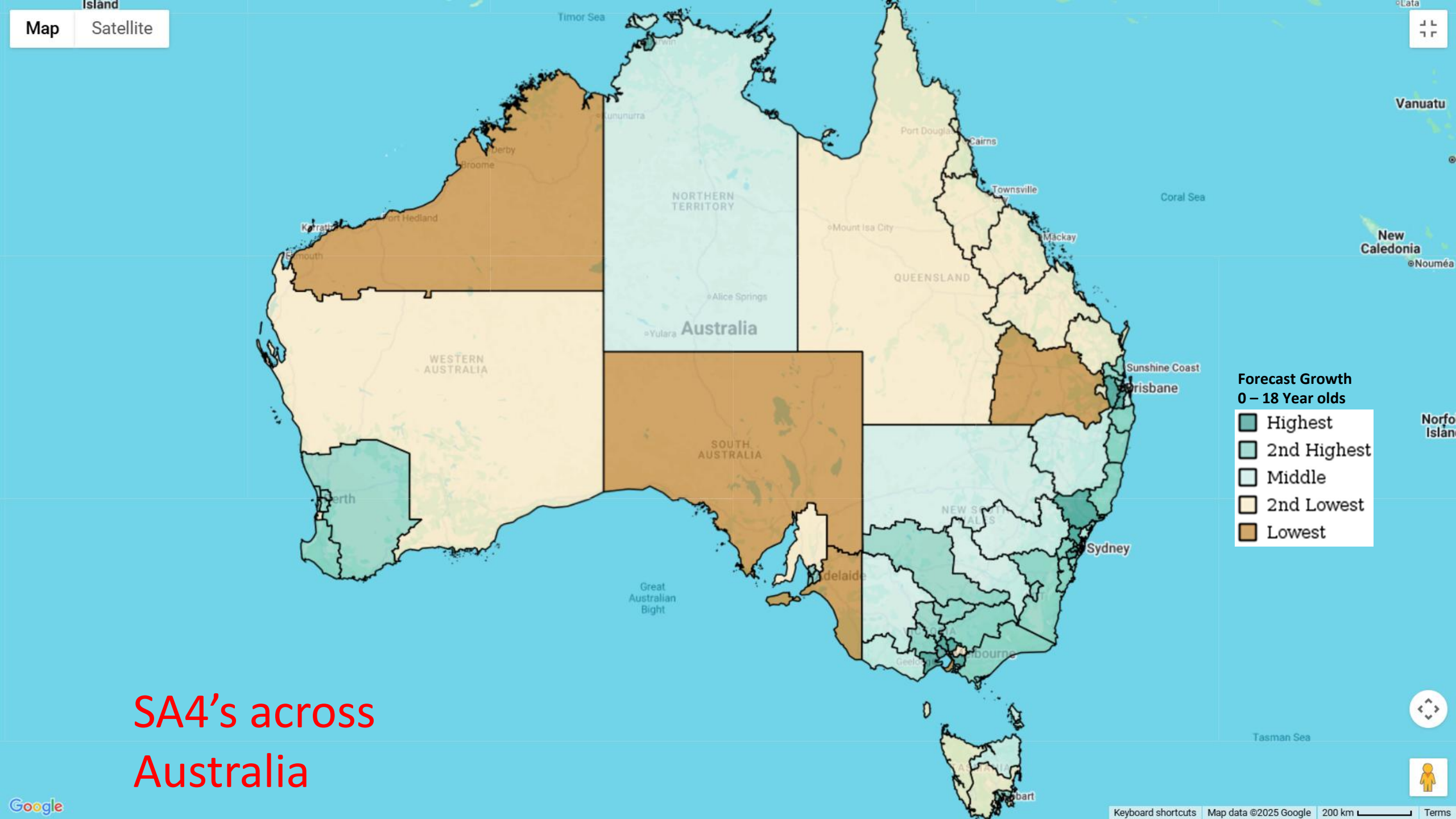
Overseas migration

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

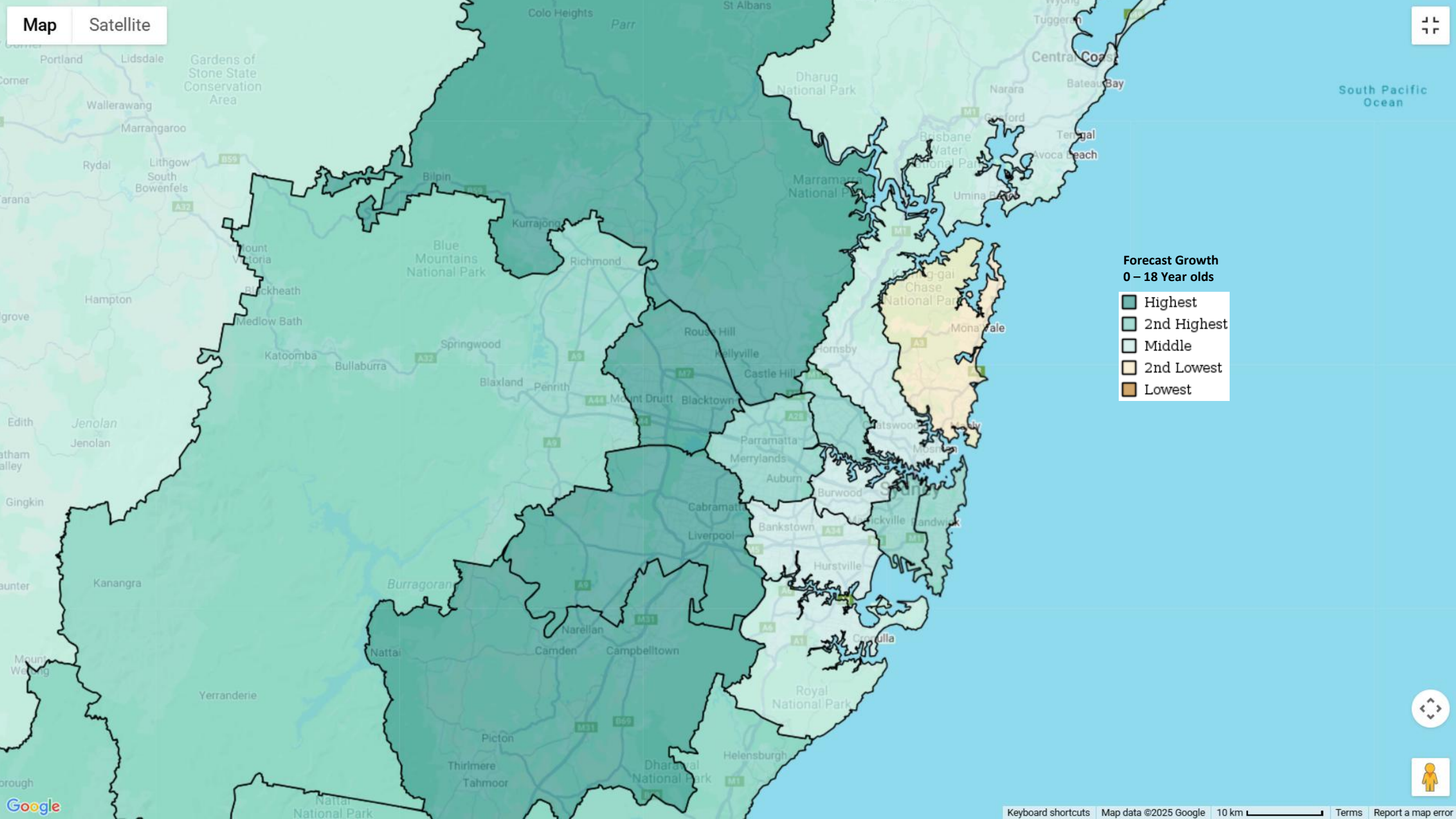
Australia's stated position in the 2023 Intergenerational Report is for a long-term net migration of 235,000 persons pa.

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



SA4's across Australia


Map
Satellite
Forecast Growth
0 – 18 Year olds
Highest
2nd Highest
Middle
2nd Lowest
Lowest
South Pacific Ocean
Blue Mountains National Park
Dharug National Park
Marramarra National Park
Royal National Park
Dharawal National Park
Nattai National Park
Parramatta
Blacktown
Liverpool
Campbelltown
Penrith
Richmond
Katoomba
Bullaburra
Springwood
Hornsby
Castle Hill
Bankstown
Hurstville
Cronulla
Camden
Picton
Thirlmere
Tahmoor
Yerranderie
Kanangra
Burragorang
Narellan
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Fertility Rates - 2024

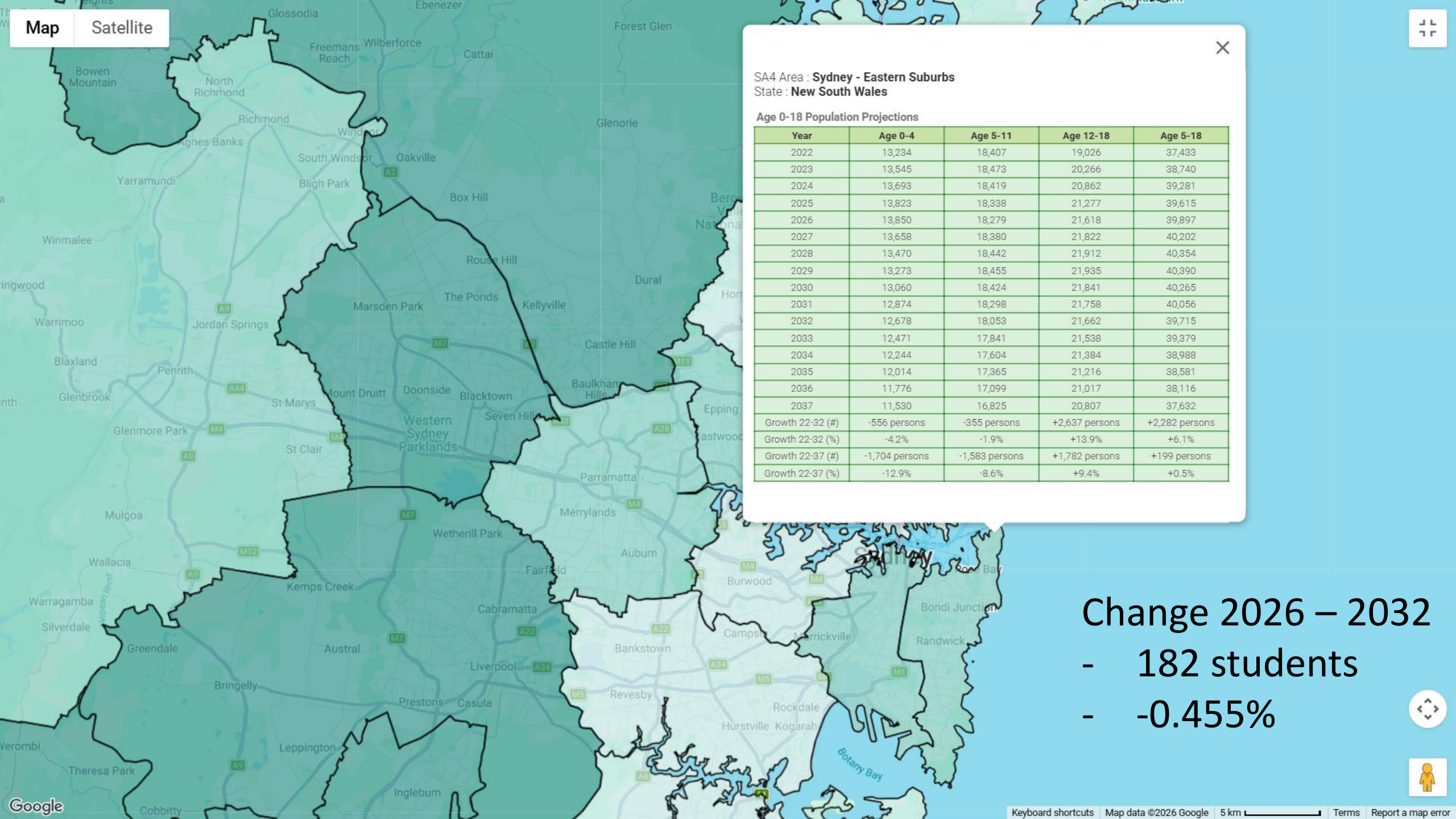
Greater Sydney		Rest of NSW and ACT	
Sydney - City and Inner South	0.84	Capital Region	2.01
Sydney - Ryde	1.07	Central West	2.12
Sydney - North Sydney and Hornsby	1.13	Coffs Harbour - Grafton	1.99
Sydney - Inner West	1.14	Far West and Orana	2.40
Sydney - Eastern Suburbs	1.17	Hunter Valley exc Newcastle	1.93
Sydney - Parramatta	1.50	Illawarra	1.67
Sydney - Northern Beaches	1.51	Mid North Coast	2.08
Sydney - Baulkham Hills and Hawkesbury	1.53	Murray	2.10
Sydney - Inner South West	1.53	New England and North West	2.13
Sydney - Sutherland	1.70	Newcastle and Lake Macquarie	1.60
Sydney - South West	1.71	Richmond - Tweed	1.83
Sydney - Blacktown	1.77	Riverina	2.10
Sydney - Outer West and Blue Mountains	1.83	Southern Highlands and Shoalhaven	1.94
Central Coast	1.87	Australian Capital Territory	1.34
Sydney - Outer South West	1.94		

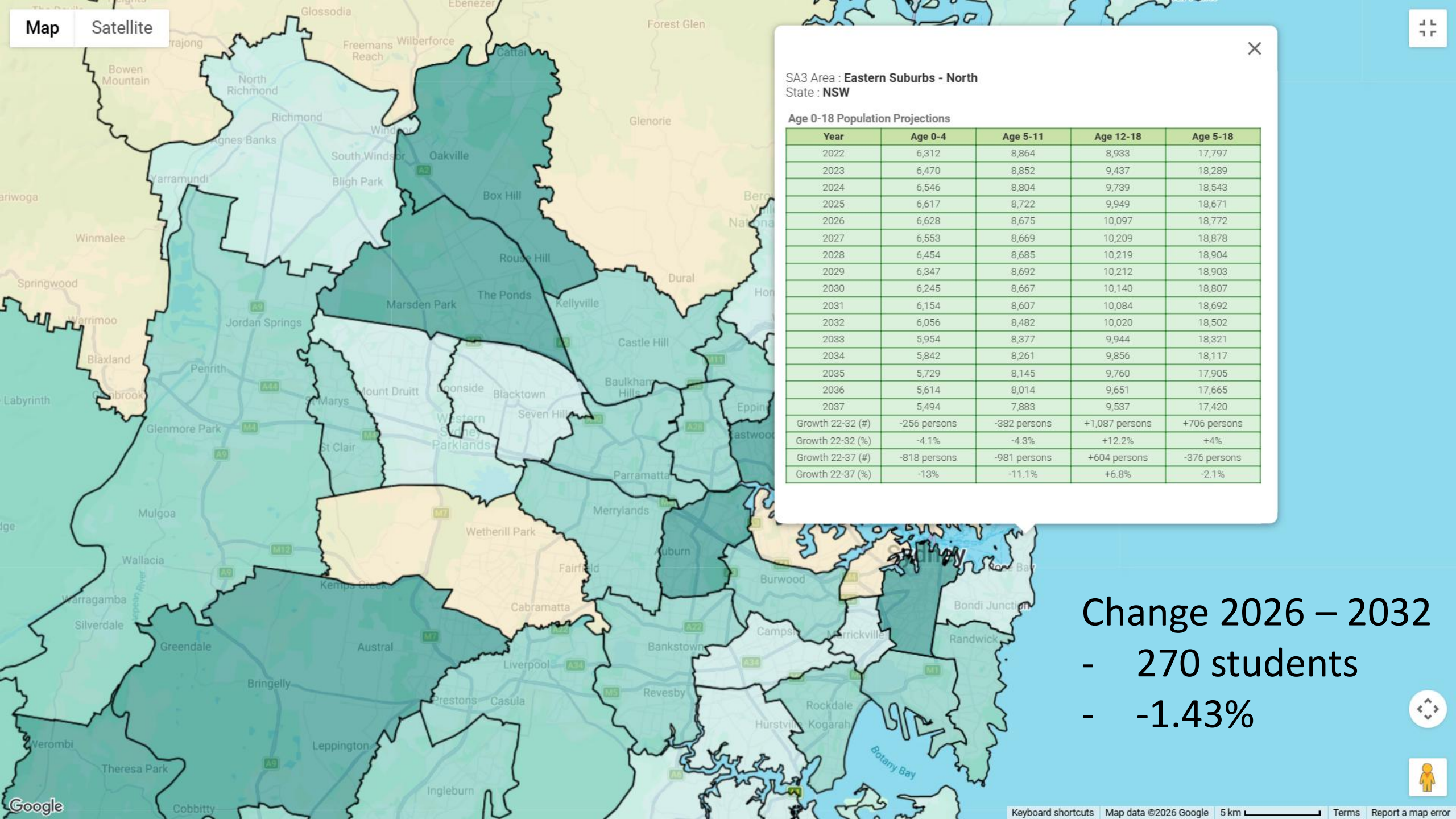
Source: ABS, Births, Australia 2024 (Table 1, SA4). TFR is the three-year average ending 2024.

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Sydney - Population projections increase / decrease 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%**


Map
Satellite
SA4 Area : Sydney - Eastern Suburbs
State : New South Wales
Age 0-18 Population Projections
Year | Age 0-4 | Age 5-11 | Age 12-18 | Age 5-18
2022 | 13,234 | 18,407 | 19,026 | 37,433
2023 | 13,545 | 18,473 | 20,266 | 38,740
2024 | 13,693 | 18,419 | 20,862 | 39,281
2025 | 13,823 | 18,338 | 21,277 | 39,615
2026 | 13,850 | 18,279 | 21,618 | 39,897
2027 | 13,658 | 18,380 | 21,822 | 40,202
2028 | 13,470 | 18,442 | 21,912 | 40,354
2029 | 13,273 | 18,455 | 21,935 | 40,390
2030 | 13,060 | 18,424 | 21,841 | 40,265
2031 | 12,874 | 18,298 | 21,758 | 40,056
2032 | 12,678 | 18,053 | 21,662 | 39,715
2033 | 12,471 | 17,841 | 21,538 | 39,379
2034 | 12,244 | 17,604 | 21,384 | 38,988
2035 | 12,014 | 17,365 | 21,216 | 38,581
2036 | 11,776 | 17,099 | 21,017 | 38,116
2037 | 11,530 | 16,825 | 20,807 | 37,632
Growth 22-32 (#) | -556 persons | -355 persons | +2,637 persons | +2,282 persons
Growth 22-32 (%) | -4.2% | -1.9% | +13.9% | +6.1%
Growth 22-37 (#) | -1,704 persons | -1,583 persons | +1,782 persons | +199 persons
Growth 22-37 (%) | -12.9% | -8.6% | +9.4% | +0.5%
Change 2026 – 2032
- 182 students
- -0.455%
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Terms
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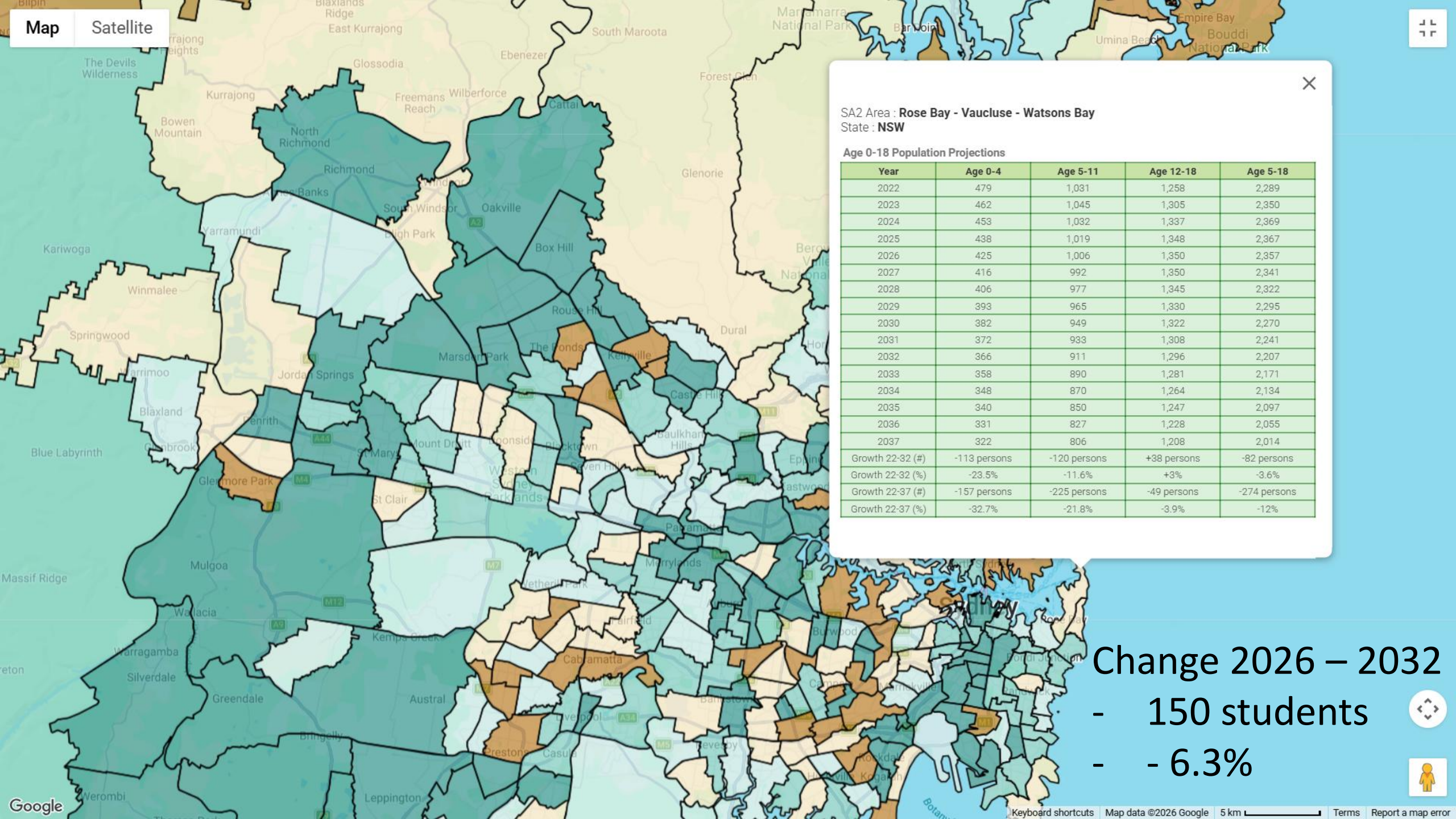
SA3 Area : **Eastern Suburbs - North**
State : **NSW**

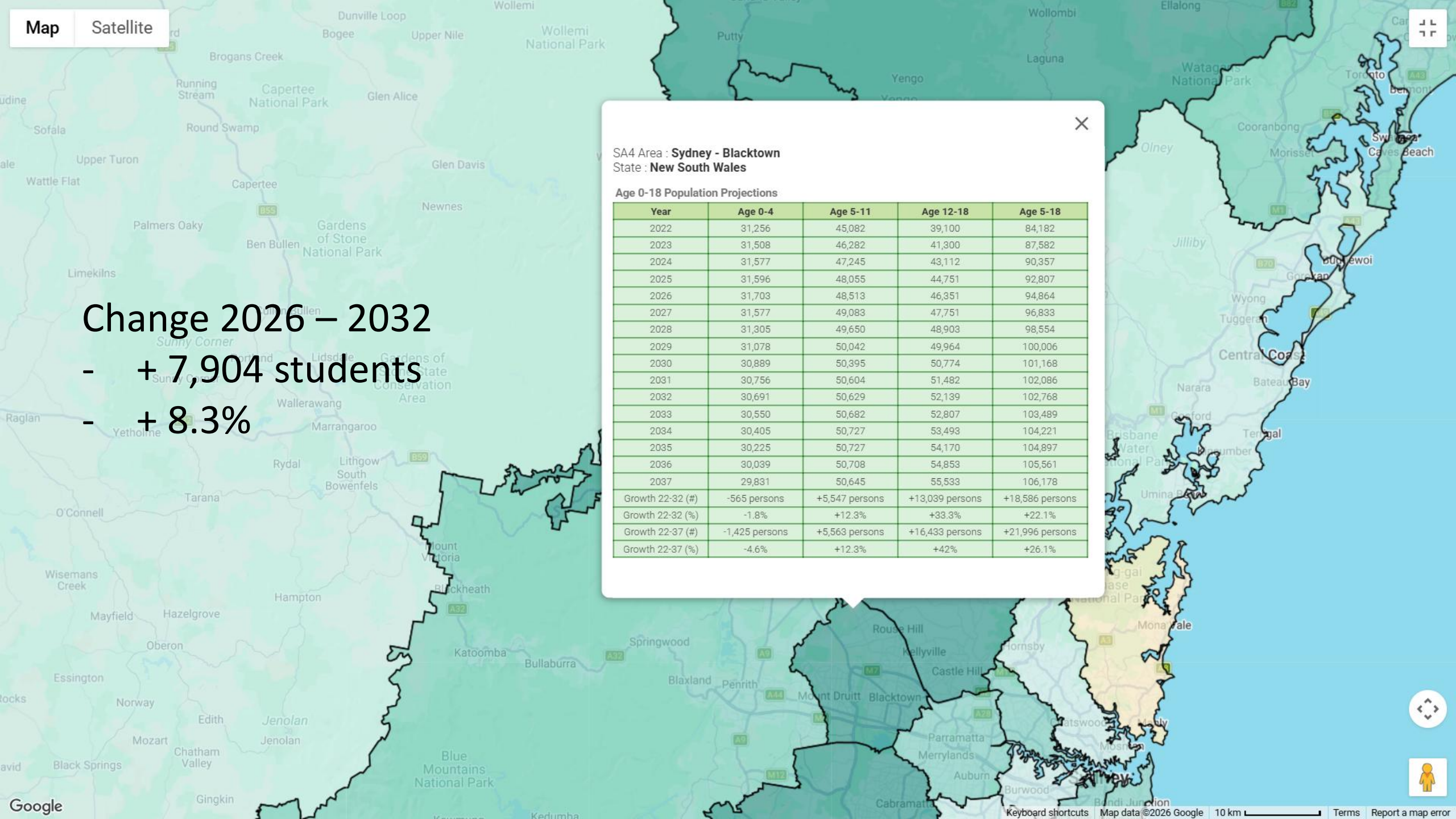
Age 0-18 Population Projections

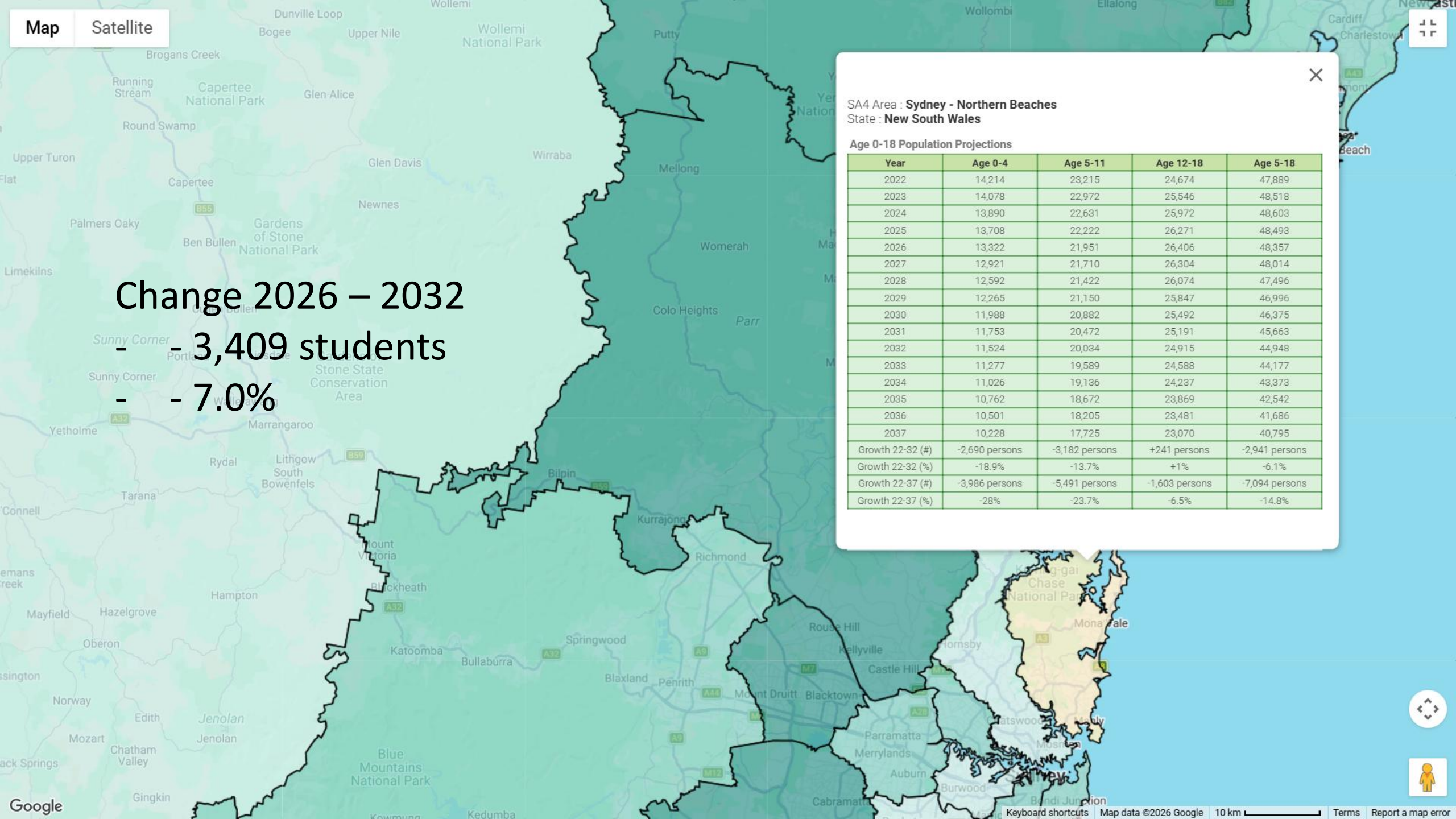
Year	Age 0-4	Age 5-11	Age 12-18	Age 5-18
2022	6,312	8,864	8,933	17,797
2023	6,470	8,852	9,437	18,289
2024	6,546	8,804	9,739	18,543
2025	6,617	8,722	9,949	18,671
2026	6,628	8,675	10,097	18,772
2027	6,553	8,669	10,209	18,878
2028	6,454	8,685	10,219	18,904
2029	6,347	8,692	10,212	18,903
2030	6,245	8,667	10,140	18,807
2031	6,154	8,607	10,084	18,692
2032	6,056	8,482	10,020	18,502
2033	5,954	8,377	9,944	18,321
2034	5,842	8,261	9,856	18,117
2035	5,729	8,145	9,760	17,905
2036	5,614	8,014	9,651	17,665
2037	5,494	7,883	9,537	17,420
Growth 22-32 (#)	-256 persons	-382 persons	+1,087 persons	+706 persons
Growth 22-32 (%)	-4.1%	-4.3%	+12.2%	+4%
Growth 22-37 (#)	-818 persons	-981 persons	+604 persons	-376 persons
Growth 22-37 (%)	-13%	-11.1%	+6.8%	-2.1%

Change 2026 – 2032

- 270 students
- -1.43%


Map
Satellite
SA2 Area : Rose Bay - Vaucluse - Watsons Bay
State : NSW
Age 0-18 Population Projections
Year | Age 0-4 | Age 5-11 | Age 12-18 | Age 5-18
2022 | 479 | 1,031 | 1,258 | 2,289
2023 | 462 | 1,045 | 1,305 | 2,350
2024 | 453 | 1,032 | 1,337 | 2,369
2025 | 438 | 1,019 | 1,348 | 2,367
2026 | 425 | 1,006 | 1,350 | 2,357
2027 | 416 | 992 | 1,350 | 2,341
2028 | 406 | 977 | 1,345 | 2,322
2029 | 393 | 965 | 1,330 | 2,295
2030 | 382 | 949 | 1,322 | 2,270
2031 | 372 | 933 | 1,308 | 2,241
2032 | 366 | 911 | 1,296 | 2,207
2033 | 358 | 890 | 1,281 | 2,171
2034 | 348 | 870 | 1,264 | 2,134
2035 | 340 | 850 | 1,247 | 2,097
2036 | 331 | 827 | 1,228 | 2,055
2037 | 322 | 806 | 1,208 | 2,014
Growth 22-32 (#) | -113 persons | -120 persons | +38 persons | -82 persons
Growth 22-32 (%) | -23.5% | -11.6% | +3% | -3.6%
Growth 22-37 (#) | -157 persons | -225 persons | -49 persons | -274 persons
Growth 22-37 (%) | -32.7% | -21.8% | -3.9% | -12%
Change 2026 – 2032
- 150 students
- - 6.3%
Google
Keyboard shortcuts
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Terms
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Map
Satellite
Change 2026 – 2032
- + 7,904 students
- + 8.3%
SA4 Area : Sydney - Blacktown
State : New South Wales
Age 0-18 Population Projections
Year | Age 0-4 | Age 5-11 | Age 12-18 | Age 5-18
2022 | 31,256 | 45,082 | 39,100 | 84,182
2023 | 31,508 | 46,282 | 41,300 | 87,582
2024 | 31,577 | 47,245 | 43,112 | 90,357
2025 | 31,596 | 48,055 | 44,751 | 92,807
2026 | 31,703 | 48,513 | 46,351 | 94,864
2027 | 31,577 | 49,083 | 47,751 | 96,833
2028 | 31,305 | 49,650 | 48,903 | 98,554
2029 | 31,078 | 50,042 | 49,964 | 100,006
2030 | 30,889 | 50,395 | 50,774 | 101,168
2031 | 30,756 | 50,604 | 51,482 | 102,086
2032 | 30,691 | 50,629 | 52,139 | 102,768
2033 | 30,550 | 50,682 | 52,807 | 103,489
2034 | 30,405 | 50,727 | 53,493 | 104,221
2035 | 30,225 | 50,727 | 54,170 | 104,897
2036 | 30,039 | 50,708 | 54,853 | 105,561
2037 | 29,831 | 50,645 | 55,533 | 106,178
Growth 22-32 (#) | -565 persons | +5,547 persons | +13,039 persons | +18,586 persons
Growth 22-32 (%) | -1.8% | +12.3% | +33.3% | +22.1%
Growth 22-37 (#) | -1,425 persons | +5,563 persons | +16,433 persons | +21,996 persons
Growth 22-37 (%) | -4.6% | +12.3% | +42% | +26.1%
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Map data ©2026 Google
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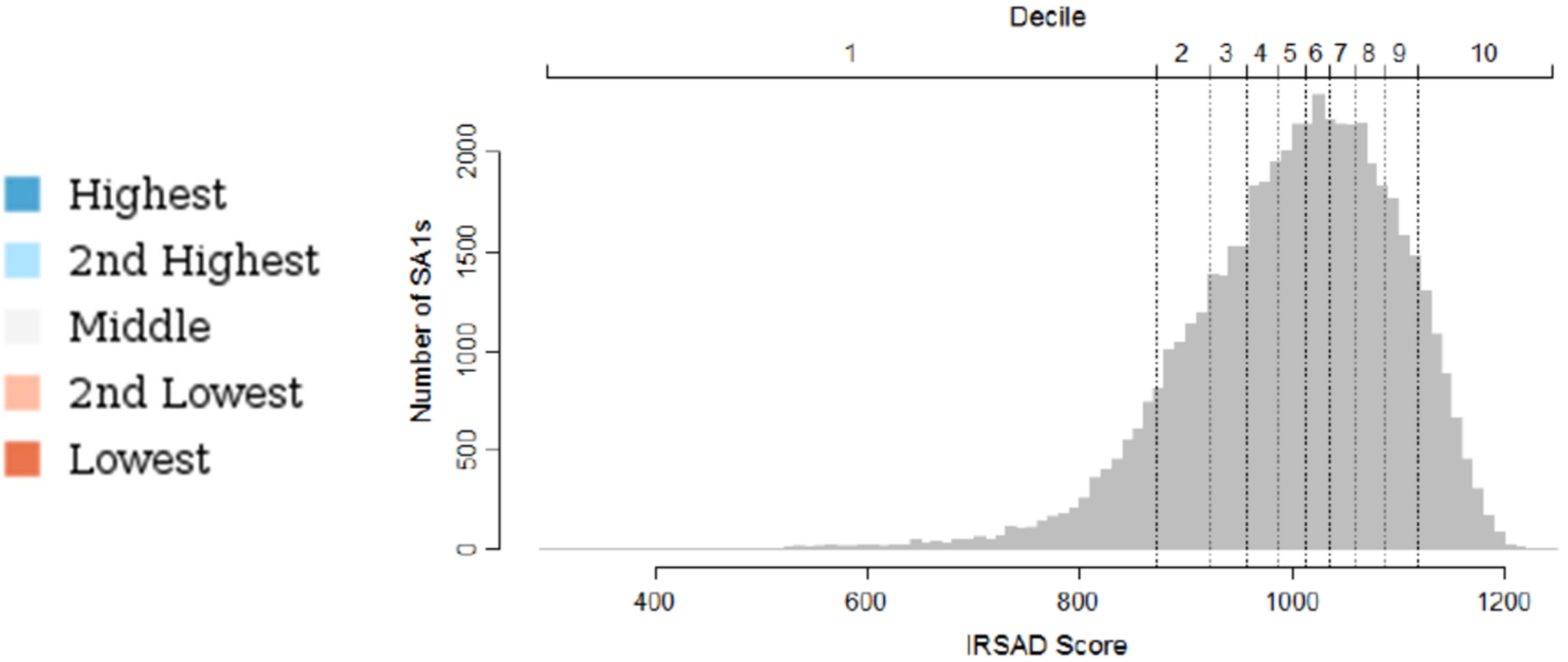


SA4 Area : **Sydney - Northern Beaches**
State : **New South Wales**

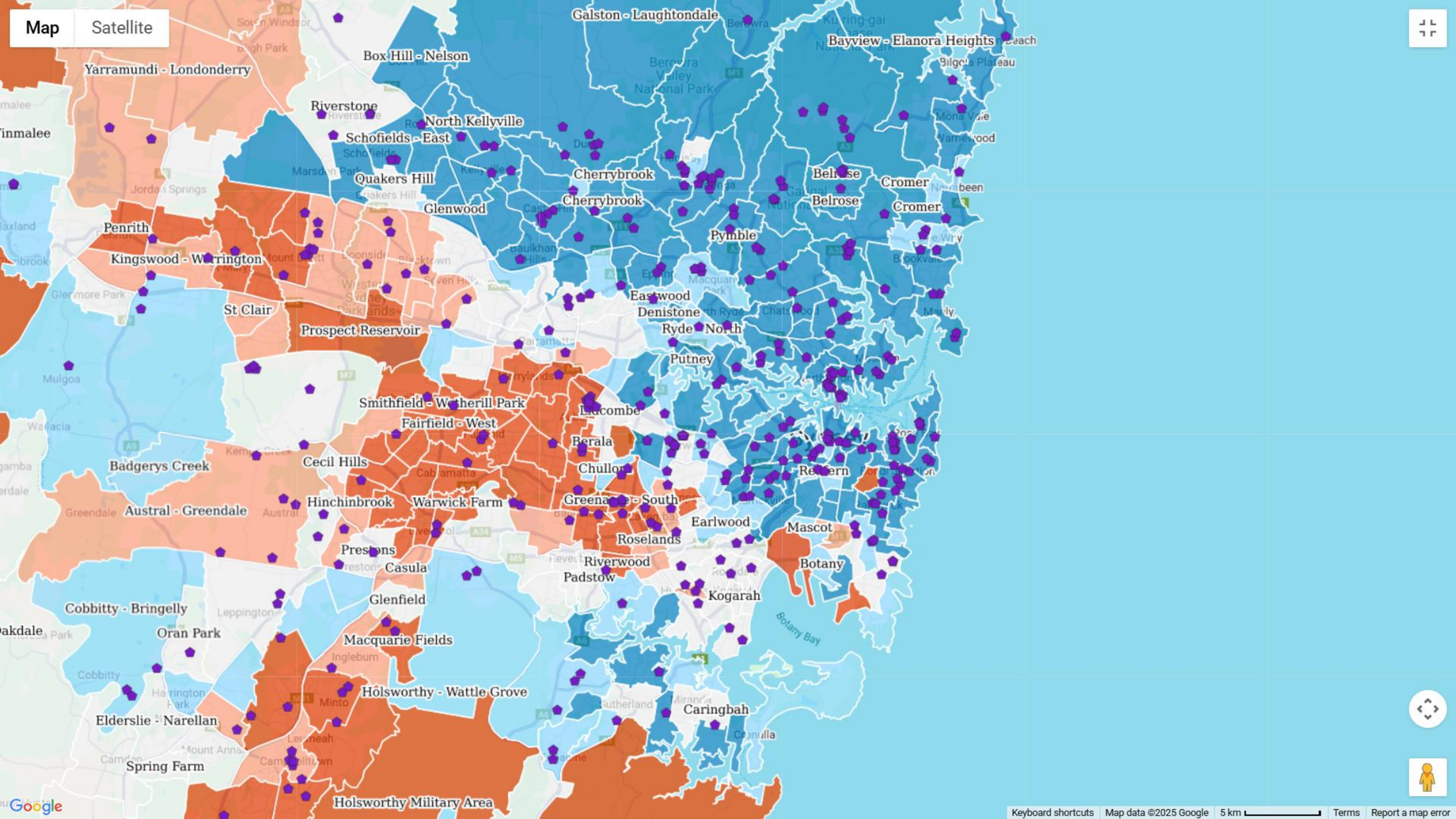
Age 0-18 Population Projections

Year	Age 0-4	Age 5-11	Age 12-18	Age 5-18
2022	14,214	23,215	24,674	47,889
2023	14,078	22,972	25,546	48,518
2024	13,890	22,631	25,972	48,603
2025	13,708	22,222	26,271	48,493
2026	13,322	21,951	26,406	48,357
2027	12,921	21,710	26,304	48,014
2028	12,592	21,422	26,074	47,496
2029	12,265	21,150	25,847	46,996
2030	11,988	20,882	25,492	46,375
2031	11,753	20,472	25,191	45,663
2032	11,524	20,034	24,915	44,948
2033	11,277	19,589	24,588	44,177
2034	11,026	19,136	24,237	43,373
2035	10,762	18,672	23,869	42,542
2036	10,501	18,205	23,481	41,686
2037	10,228	17,725	23,070	40,795
Growth 22-32 (#)	-2,690 persons	-3,182 persons	+241 persons	-2,941 persons
Growth 22-32 (%)	-18.9%	-13.7%	+1%	-6.1%
Growth 22-37 (#)	-3,986 persons	-5,491 persons	-1,603 persons	-7,094 persons
Growth 22-37 (%)	-28%	-23.7%	-6.5%	-14.8%

SEIFA - Socio-Economic Index for Areas



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Map
Satellite
Galston - Laughtondale
Bayview - Elanora Heights
Box Hill - Nelson
Yarramundi - Londonderry
Riverstone
North Kellyville
Schofields - East
Quakers Hill
Glenwood
Cherrybrook
Belrose
Cromer
Penrith
Kingswood - Werrington
Pymble
Eastwood
Denistone
Ryde
North Ryde
Putney
St Clair
Prospect Reservoir
Smithfield - Wetherill Park
Lidcombe
Fairfield - West
Berala
Badgerys Creek
Cecil Hills
Chullora
Hinchinbrook
Warwick Farm
Greenacre - South
Earlwood
Mascot
Austral - Greendale
Roselands
Prestons
Casula
Riverwood
Padstow
Botany
Kogarah
Glenfield
Cobbitty - Bringelly
Oran Park
Macquarie Fields
Holsworthy - Wattle Grove
Caringbah
Elderslie - Narellan
Spring Farm
Holsworthy Military Area
Botany Bay
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Market Shares by SA4

SA4	SEIFA	% Indep	% Catholic	%Government
Eastern Suburbs Primary	1140	28.9%	18.8%	52.3%
Eastern Suburbs Secondary		50.0%	27.1%	22.9%
North Sydney and Hornsby Primary	1148	17.2%	11.7%	71.2%
North Sydney and Hornsby Secondary		38.9%	19.4%	41.7%
Sydney Blacktown Primary	1006	9.6%	20.3%	70.1%
Sydney Blacktown Secondary		12.0%	26.7%	61.3%
Sydney Outer South West Primary	984	12.8%	14.9%	72.3%
Sydney Outer South West Secondary		14.4%	24.6%	61.0%
Sydney South West Primary	945	11.3%	22.9%	65.8%
Sydney South West Secondary		12.1%	23.8%	64.1%

Data from Census 2021

How times have changed – Single sex vs Co-Ed

Calendar Year	2010		
School Sector	Independent		
Count of Total Enrolments	**Column Labe**		
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	4.2%	5.6%	90.1%
Grand Total	**6.2%**	**7.3%**	**86.5%**

Calendar Year	2025		
School Sector	Independent		
Count of Total Enrolments	**Column Labels**		
State / Terr	**Boys**	**Girls**	**Co-Ed**
ACT	11.1%	0.0%	88.9%
NSW	5.8%	7.2%	87.1%
NT	0.0%	0.0%	100.0%
QLD	4.2%	4.2%	91.6%
SA	1.9%	3.8%	94.3%
TAS	2.9%	5.9%	91.2%
VIC	3.9%	7.4%	88.7%
WA	2.5%	5.6%	92.0%
Grand Total	**4.2%**	**5.8%**	**89.9%**

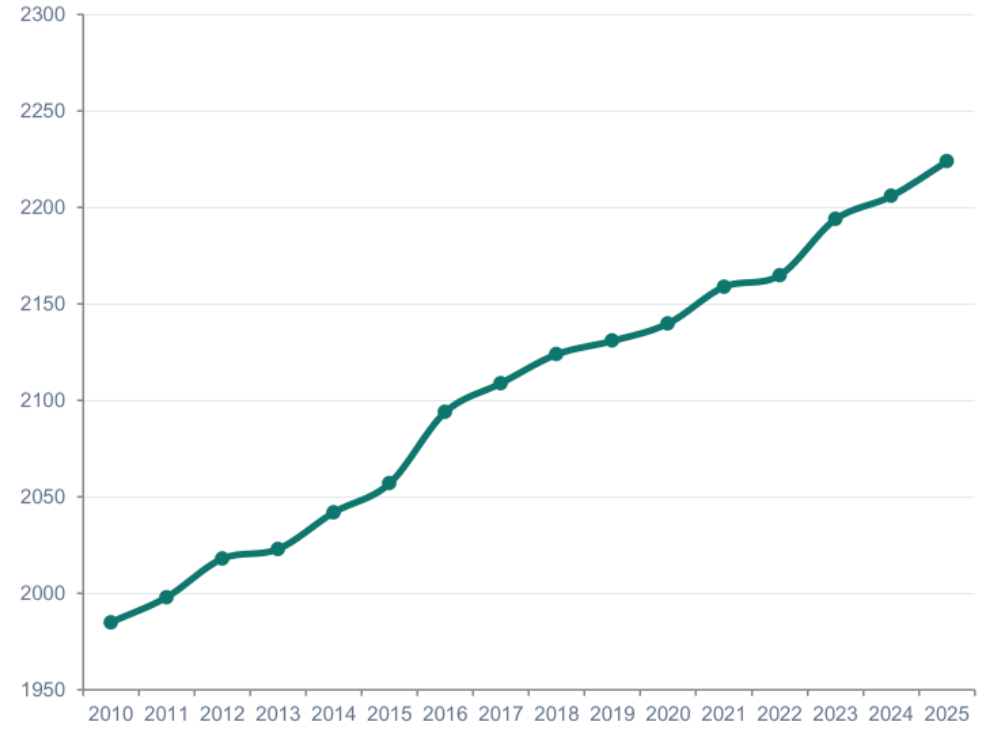
Single sex school defined as < 5% opposite gender

Co-ed, Boys and Girls School

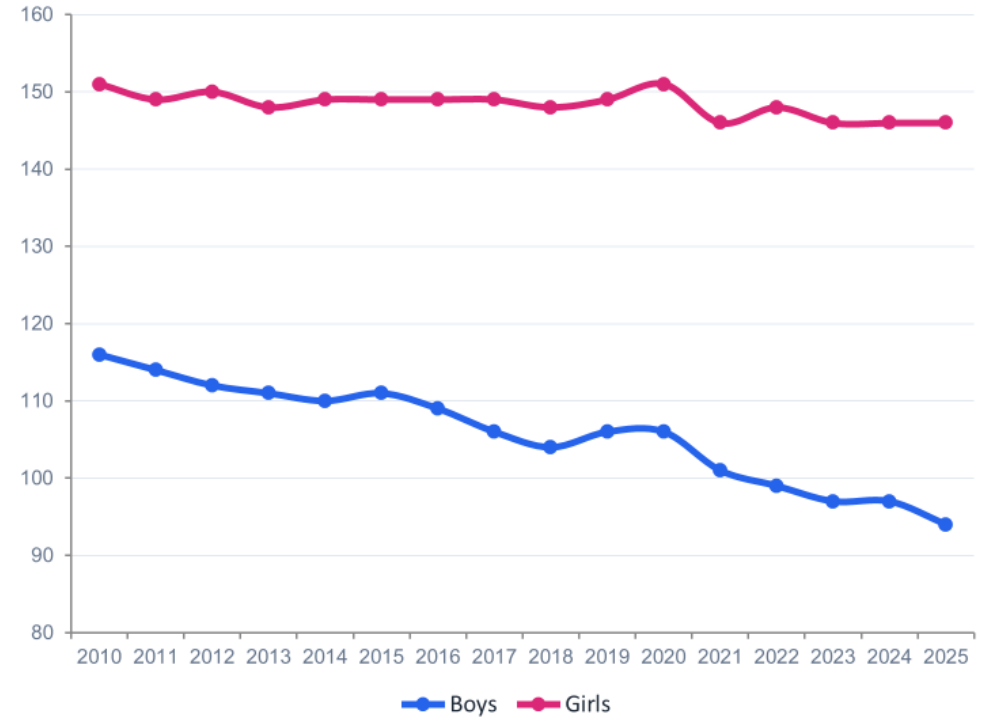
National trend — school counts

Catholic + Independent combined, by classification, 2010–2025

Co-ed schools (count)



Single-sex schools (count)



Co-ed schools grew steadily by 239 across the period. Boys-only schools declined from 116 to 94. Girls-only schools held broadly flat.

Single sex vs Co-Ed

2025 Single-Sex School Counts - All Sectors

Schools with ≥100 total enrolments

	BOYS schools				GIRLS schools			
State	Govt	Cath	Indep	Total	Govt	Cath	Indep	Total
NSW	19	10	24	**53**	21	17	32	**70**
VIC	1	14	6	**21**	6	24	17	**47**
QLD	0	14	9	**23**	0	19	10	**29**
WA	0	3	5	**8**	0	1	8	**9**
SA	0	3	2	**5**	1	7	4	**12**
TAS	0	1	1	**2**	0	2	2	**4**
ACT	0	0	2	**2**	0	2	1	**3**
NT	0	0	0	**0**	0	0	0	**0**
AUSTRALIA	**20**	**45**	**49**	**114**	**28**	**72**	**74**	**174**

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

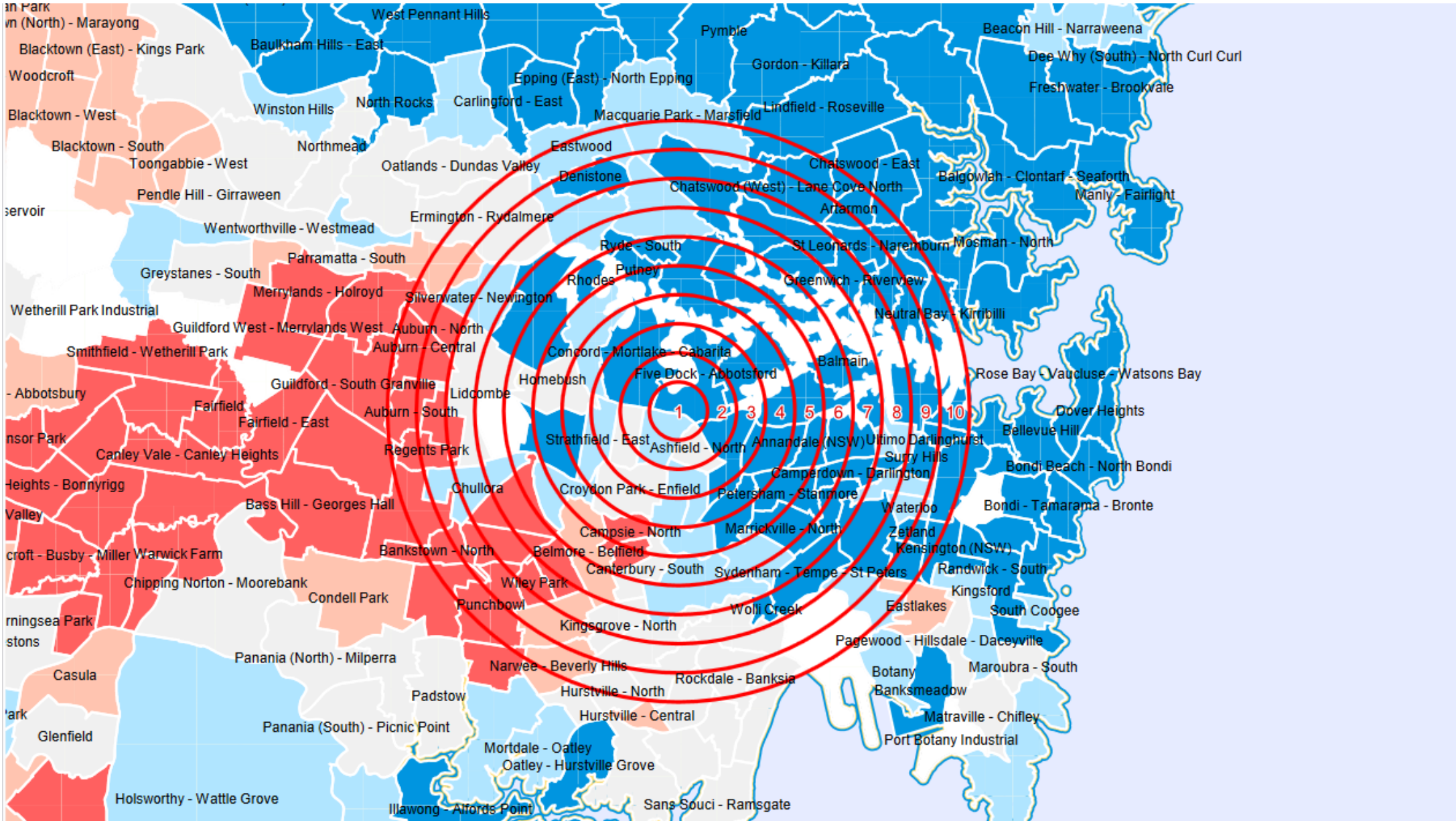
Year	Boys schools		Co Ed schools	
1970	20		0	
2008	8		12	
2025	8		12	
	Boys	Girls	Boys	Total
2008	11,911	8,982	12,741	21,723
2015	12,547	9,845	13,705	23,550
2020	12,971	11,555	14,391	25,946
2025	12,741	13,533	15,687	29,220
% 2008 - 2025	7.0%	50.7%	23.1%	34.5%

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

Research – How far do your students come from?



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

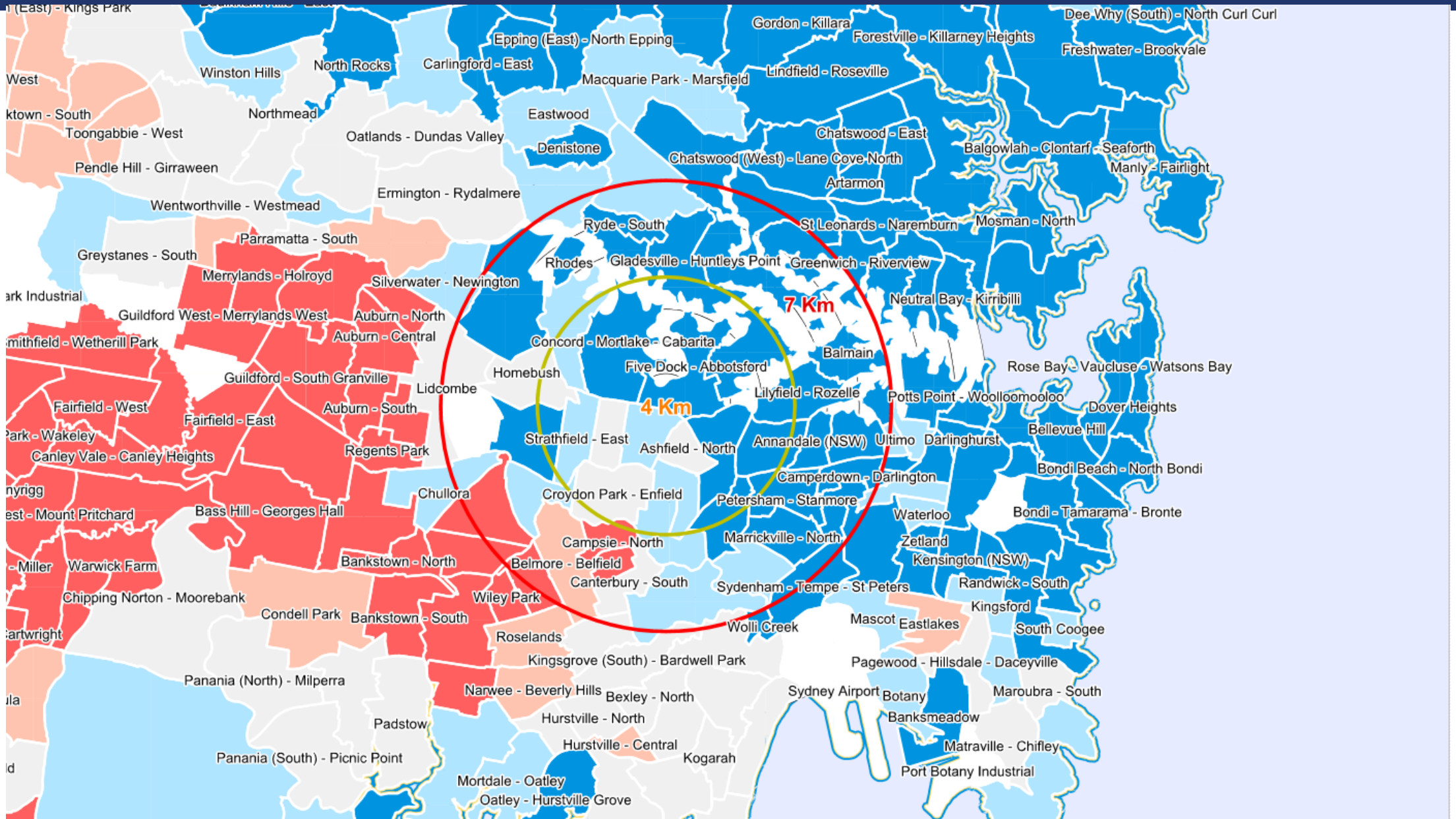
Research - Spectrum has undertaken using 5 campuses and over 7,500 students in the top 20% Socio-Economic areas of Inner Sydney.

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

Research – How far do your students come from?



……Middle and lower socio-economic areas.

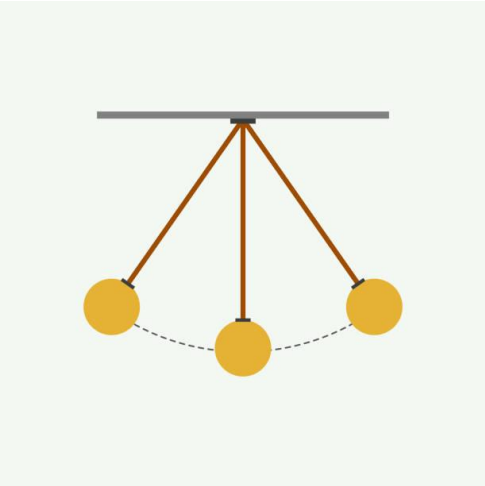
Research - Spectrum has undertaken using 11 campuses and nearly 13,000 students in Middle and Outer Sydney suburbs.

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

Which way is the Pendulum moving for your school?



My View

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

Suggested Action plans:

- Measure future enrolments at specific times of the year for comparisons?
- Measure changes in market share by postcode or suburb over time?
- Do we know which are our best feeder schools and which ones are we increasing from and which are decreasing?
- Are our bus runs as effective as they could be, and can we see which students use our buses and which ones don’t?
- Are we doing our marketing in the best potential areas?

Questions?



SPECTRUM ANALYSIS
Geodemographic Modelling & Analysis

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Examples

Information we can use to make the right

business decisions.

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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)

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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

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Looking into the Future - Macro

- Will Independent schools keep growing in total enrolment numbers?
- Some Independent schools are indicating they are “FULL” and stabilising their numbers.
- Federal Government announced “Better and Fairer Schools Agreement (2025 – 2034)”. What effect will this have?
- Funding of Independent and Catholic schools is an issue.
- Can Catholic schools hold their market share – especially smaller primary schools?
- As the economy is declining, will this cause a move back to lower fees schools?
- The move to Co-ed is happening and how will this effect single sex schools?