

# Trends across Australian Education sectors:

Census Results 2006 to 2011(16)

ABS School Census 1998 to 2016

My School Fees 1998 to 2016

# Ind profile 2011 minus 2006

Independent Sector market share shifted from high fee CBD schools to outer urban low fee Independent schools.

This reflected profiles moving:

- Down for Asian born and higher income professionals in real estate, arts, admin consulting, media and finance (to Govt sector).
- Up for female FIFO workers, evangelicals, older parents, managers, farmers, machine operators, health care workers (from Catholic & Govt. sectors).

# Govt profile 2011 minus 2006

Government Sector market share shifted from outer urban state schools to inner urban selective schools and high SES urban catchments regulated by housing prices.

This reflected profiles moving:

- Down for farmers, service & sales workers, blue collar workers, evangelicals (to Cath & Ind sectors).
- Up for Asian born, young, mobile, renters, high SES professionals & male clerical workers, in Finance, IT (from Ind & Catholic sectors).

# Catholic profile 2011 minus 2006

Catholic Sector market share shifted from inner suburbs to lower priced urban fringes, moving:

- Down for Catholic & Orthodox migrants, e.g. Ireland, Poland, Philippines, Greece, as well as professionals and male clerks and families impacted by unemployment (to Govt. sector).
- Up for some self-employed, younger, protestant families with mother a part time service worker and dad in a FIFO job (from Govt. sector)

# Census 2016 so far ...

No changes observed for Ind Sector so far in previous trends from 2006 to 2011.

Ind Sector steady at 2.2 percent per capita.

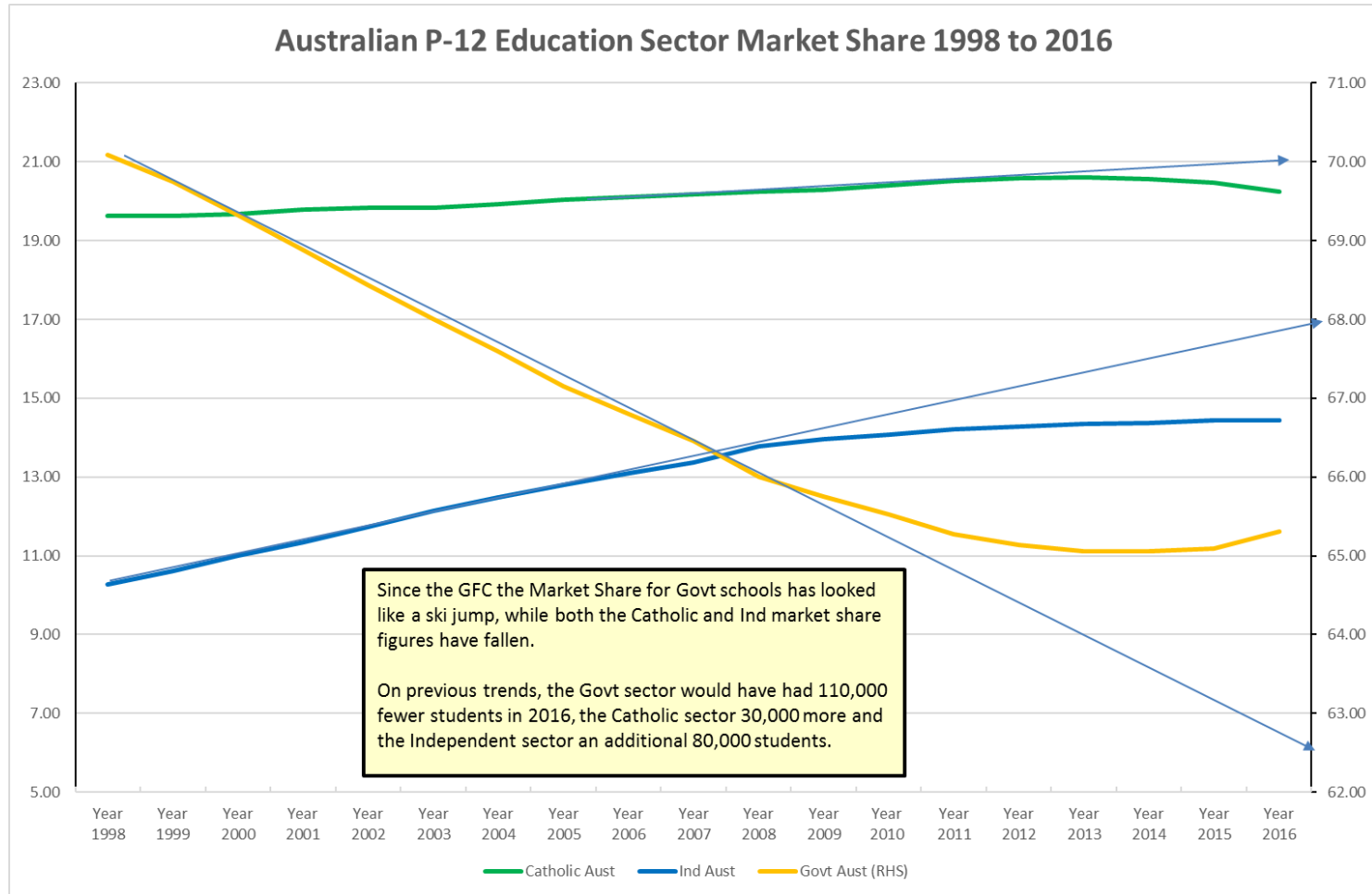
Biggest losses (to Govt sector) in high SES inner suburbs of Perth, Melbourne and Brisbane and lower SES regions losing jobs.

Biggest gains (from Govt sector) in Sydney Inner (wealth effect) and low SES regions with big jobs growth.

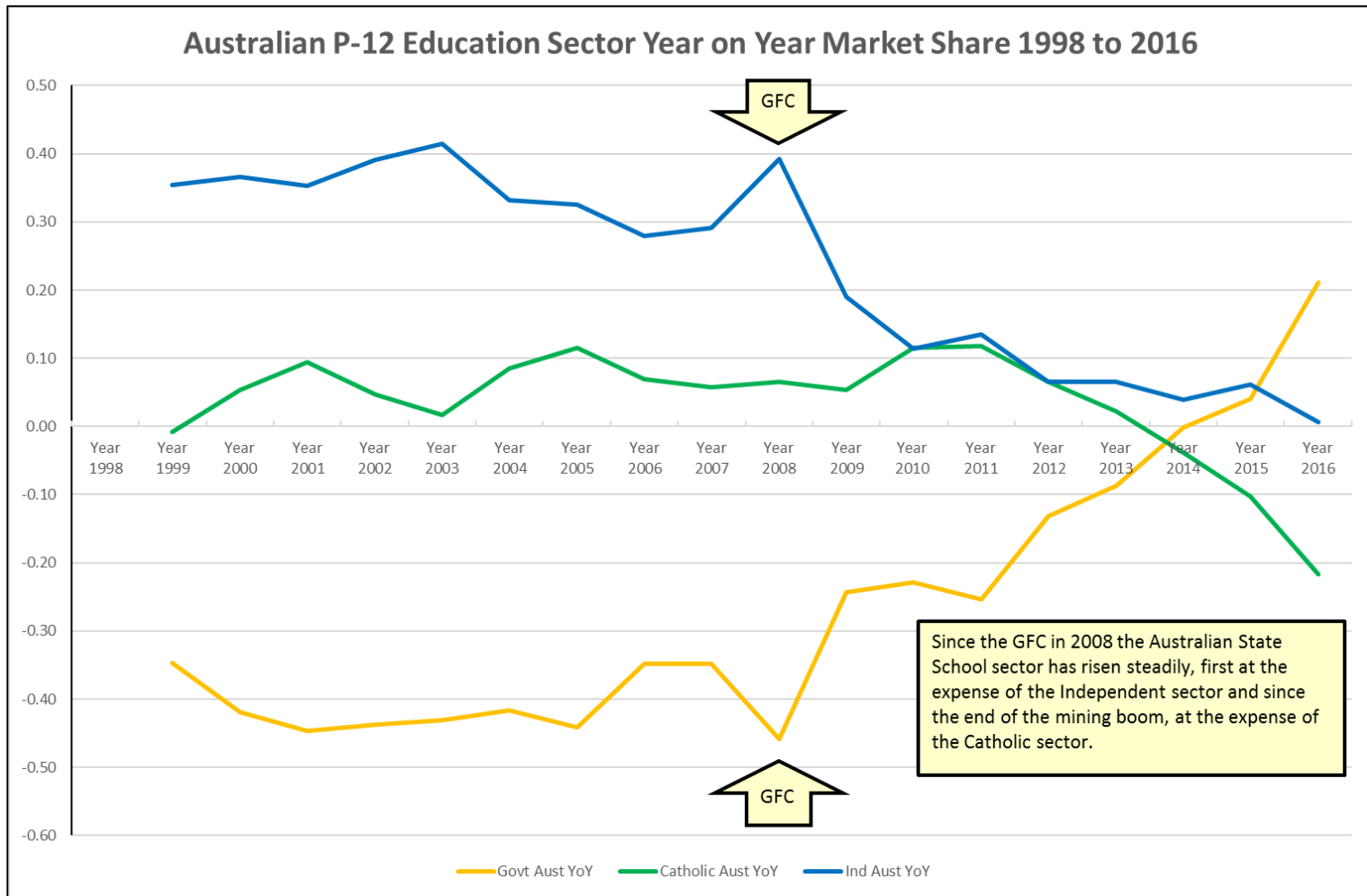
# Trends across Australian Education sectors:

## ABS School Census 1998 to 2016

# GFC impact on student numbers

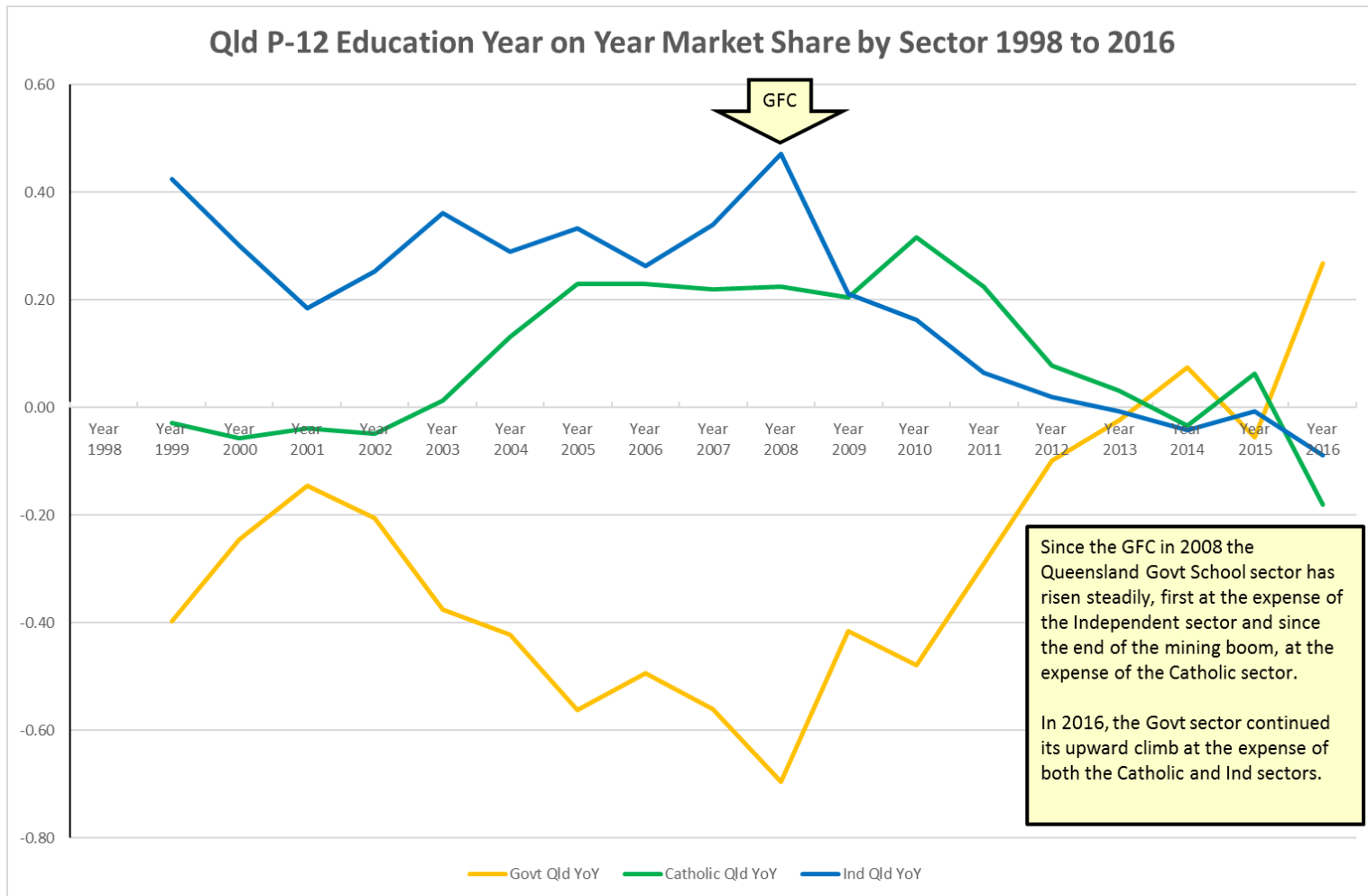


# GFC impact on three sectors

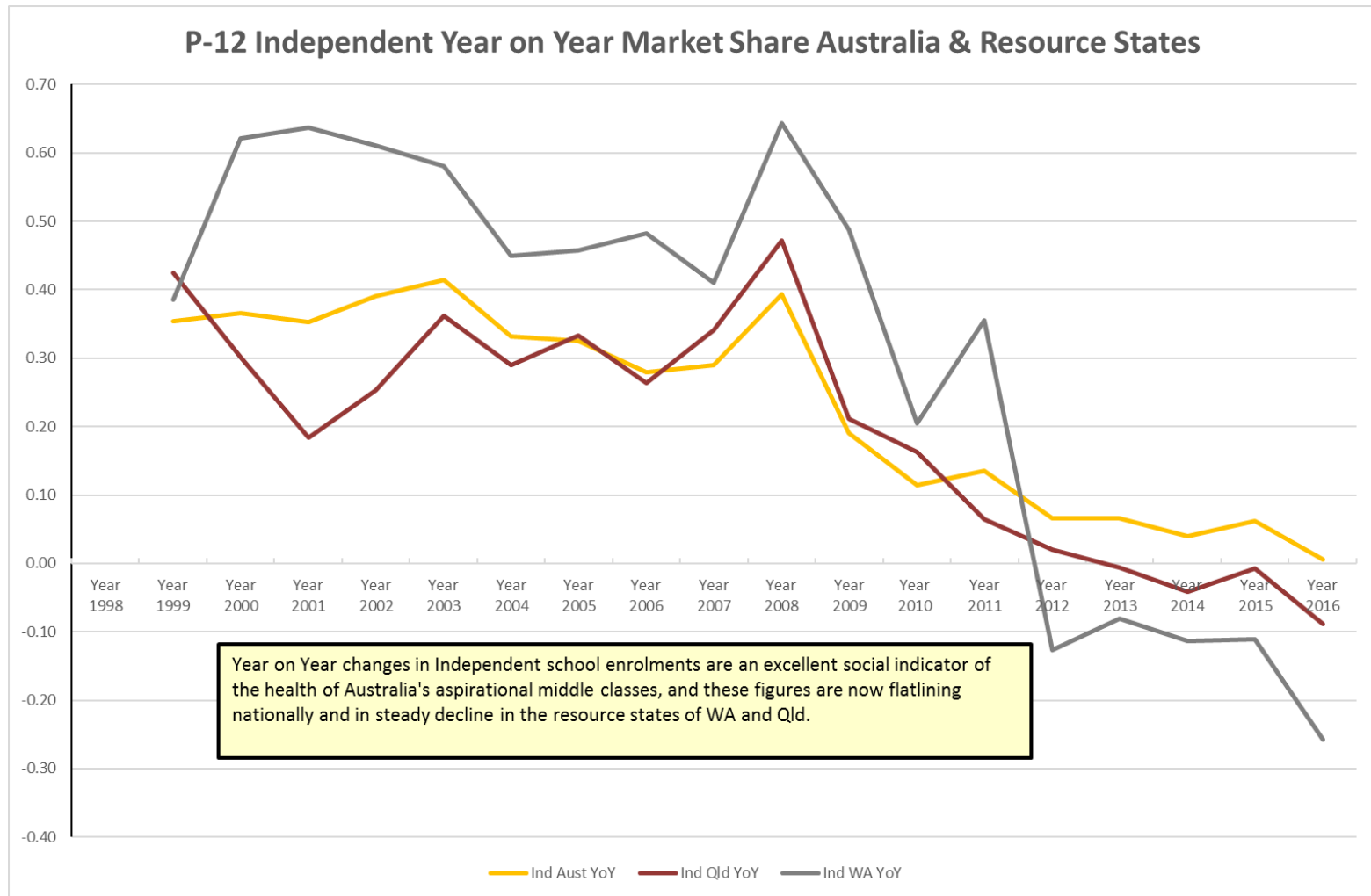




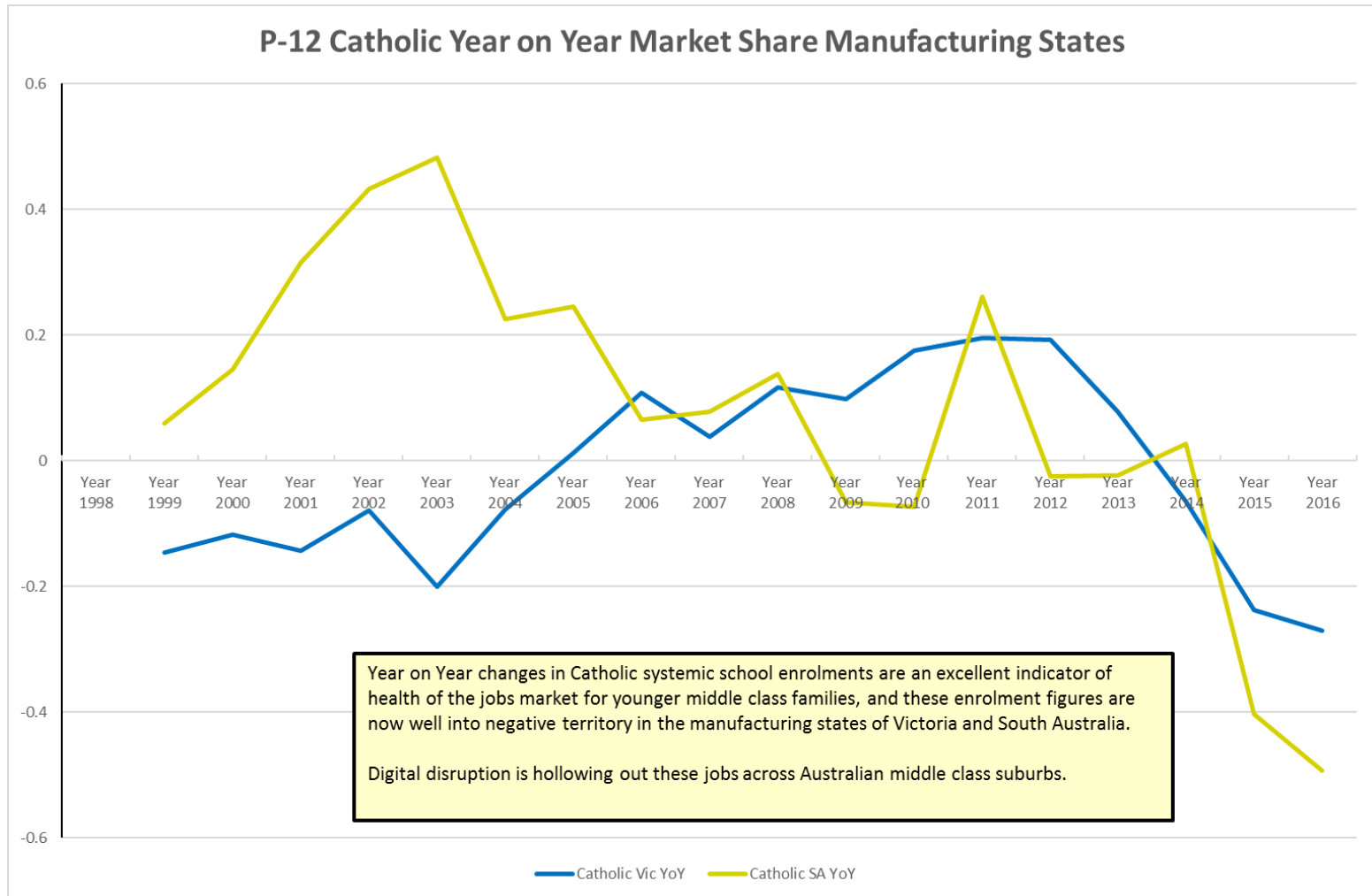
# GFC impact on Qld sectors



# GFC impact on Resource States



# GFC impacts Manufacturing States

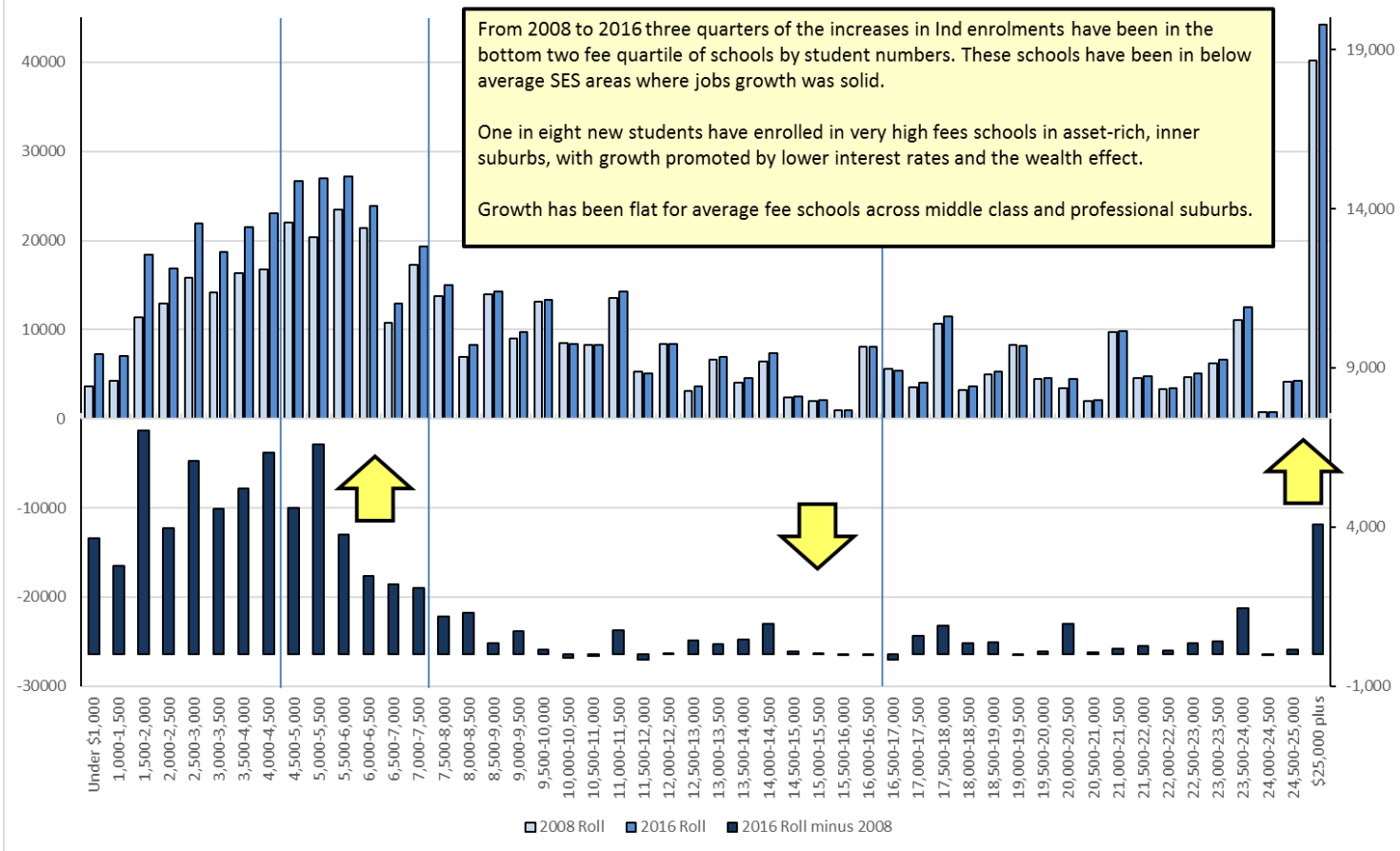


# Trends across Australian Independent sector by My School Fees:

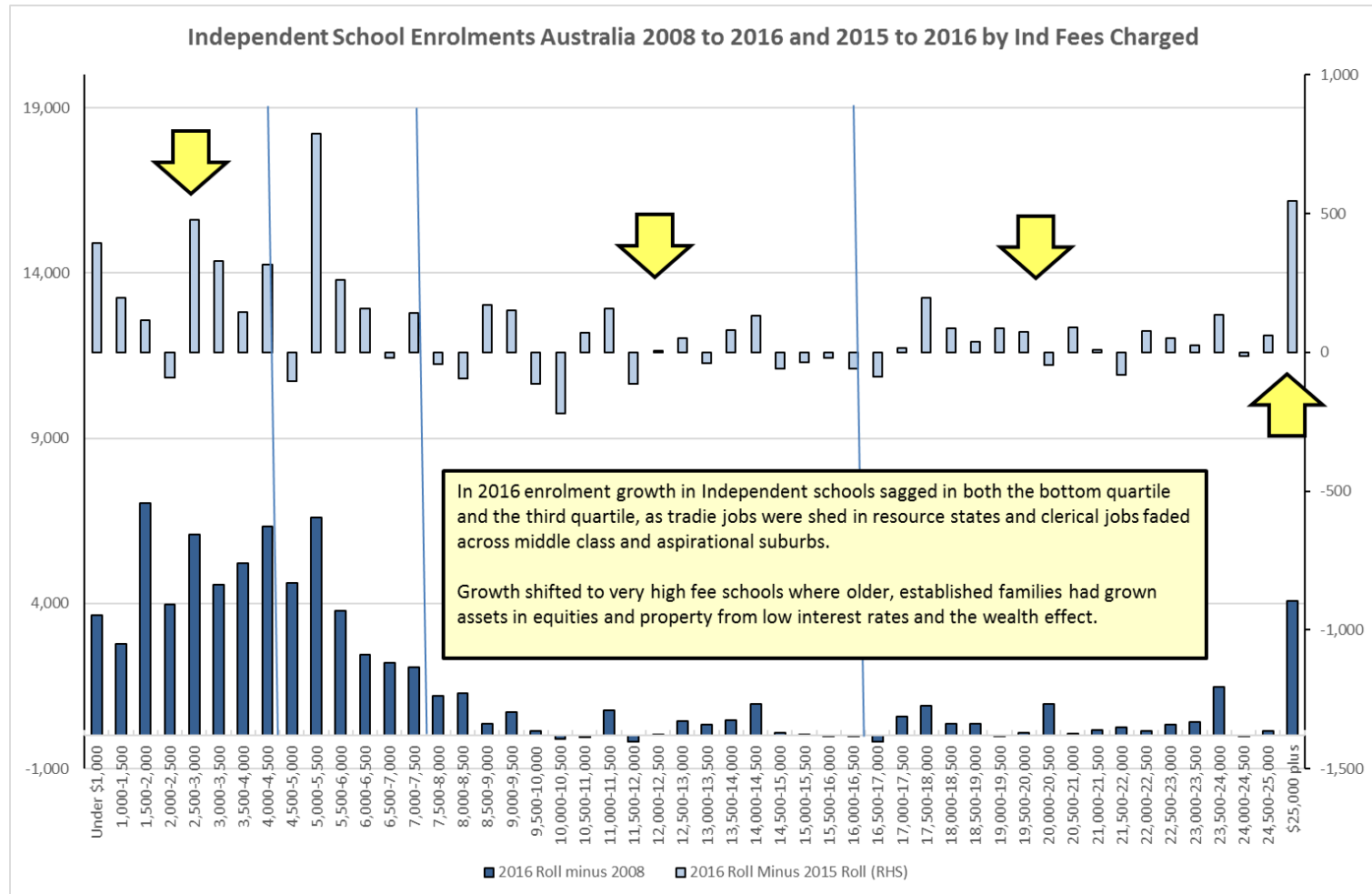
## 2008 to 2016

# Long term Ind Growth

Independent School enrolments Australia 2008 to 2016 by Ind Fees charged



# Low fee Growth stops in 2016



# Culprits of Change

- The internet of things means up to four in ten jobs may disappear in 15 years.
- Jobs under threat include the three out of ten workers who are Clerks and Tradies.
- One in four of all Independent school families rely on Clerical/Tradie jobs now under threat.
- Higher SES public servants, professionals and many Asian migrants prefer high SES public schools.
- Younger Gen X Catholic professionals tend to be Sector neutral.
- Housing bubble will pop louder for Ind school parents with investment homes and young professionals.

# Map Links

2008 to 2016 labour market changes

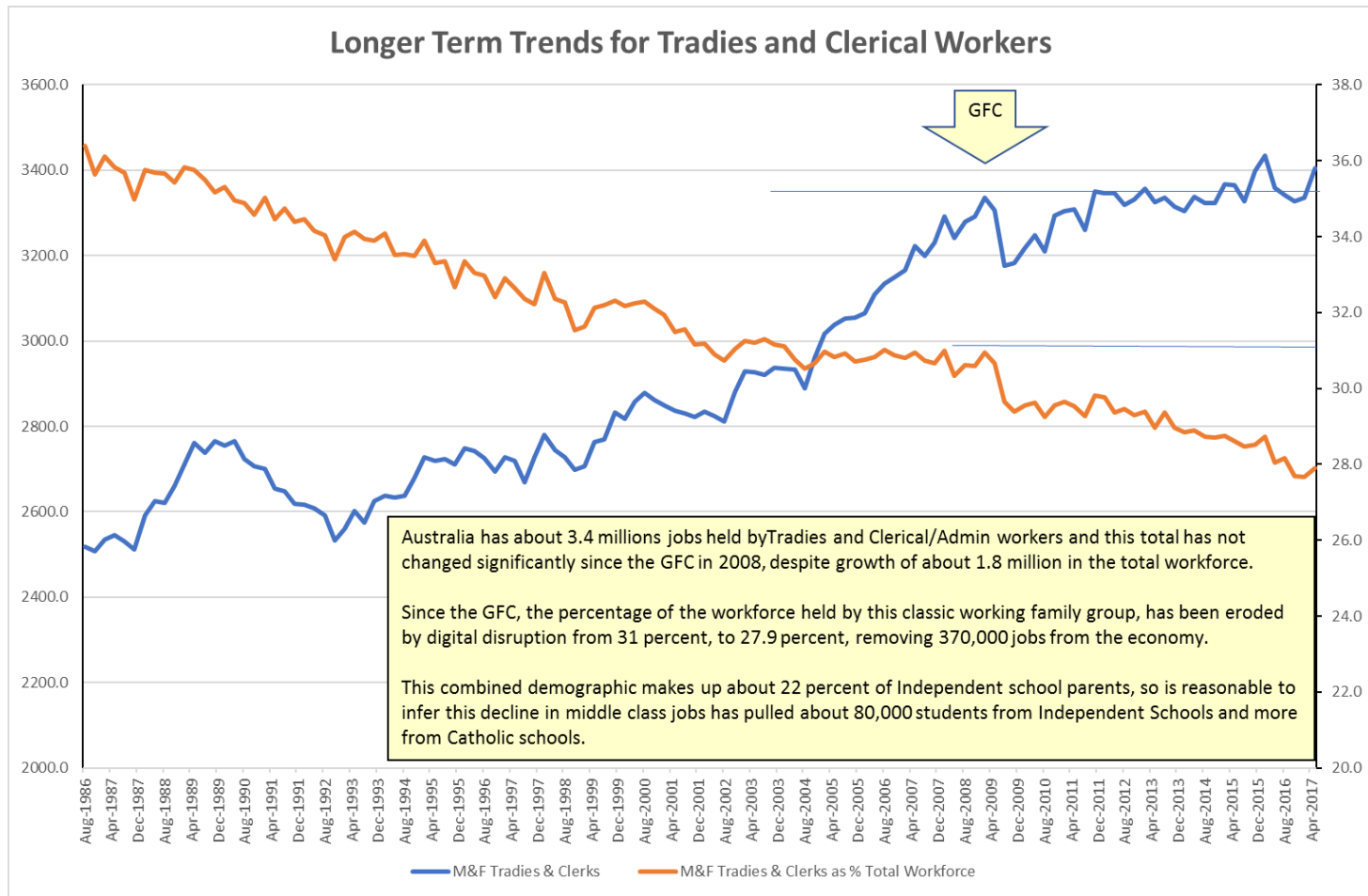
<https://educationgeo.maps.arcgis.com/apps/webappviewer/index.html?id=de5ec5b142644631976efa3b384f6948>

Education Geographics

<http://www.educationgeographics.net.au/>



# Key Ind sector job trends to 2017



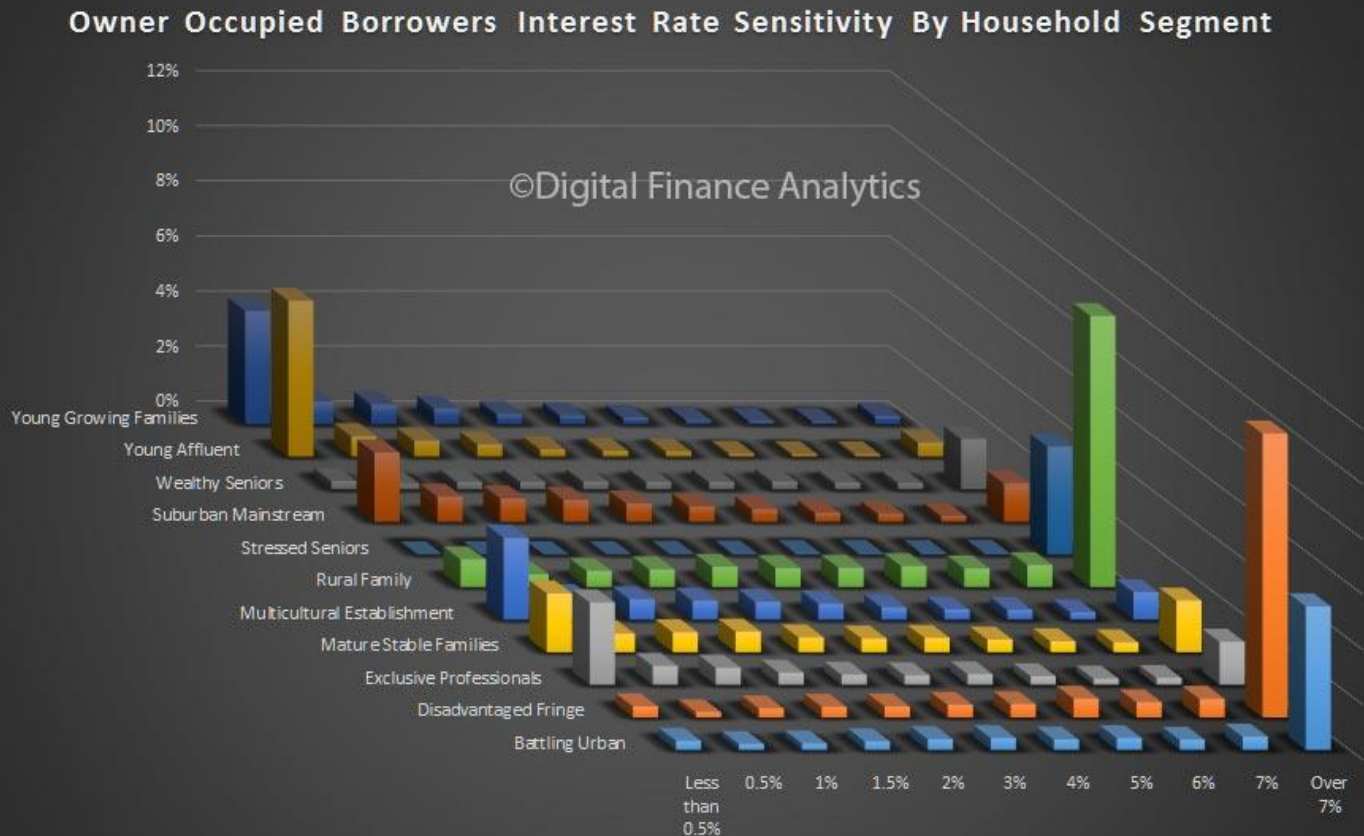
# Gen X Catholics more professional ...

- Between Census 2001 and 2011, among Australian women living in a relationship, the proportion of Catholic women with degrees has grown from 14.5 percent to 23.2 percent
- The proportion of Catholic women with Diplomas or Certificates has grown from 17.5 percent to 24.7 percent.

## ... and marrying non Catholics

- Between Census 2001 and Census 2011 an additional 235,000 female Catholics with Certificates, Diplomas or Degrees were living in relationships.
- Only half were coupled with Catholic men.
- More than 101,000 were coupled with Other Christian or Agnostic men.

# Reverse of the wealth effect



# Recurrent themes of change

- Aspiration vs affordability
- Parents chasing highest affordable SES parent cohort as a known predictor of outcomes
- As participation rates drop, local parents swap to less expensive Independent schools
- With flat per capita incomes and little jobs growth for working families, many high fee schools are no longer affordable in the suburbs
- In Goat Cheese Circle fees are increasingly funded by family capital and real estate speculation.

# Take charge of Big Data

1. Measure it, monitor it and manage it.
2. Set your demographic strategy in year one and monitor it quarterly and annually.
3. Benchmark your school – demographics, fees and numbers.
4. Identify demographic and geographic limits of your catchment.
5. Understand the impact and risks of changing local demographics.
6. Establish price points for your catchment and your typical parents.
7. Check performance of competing sectors and fee ranges impacting your enrolments and market share.

# Be spatial & demographic

1. Identify demographic & spatial opportunities within your major catchment.
2. How many potential enrolments does the model identify? Typically about 750.
3. Where do most of these potential enrolments live?
4. Push out your major catchment boundaries if you need to. They aren't fixed.
5. Integrate your marketing and transport initiatives.
6. Get into social media campaigns with ready made profile. It's cheap and effective for Gen X mothers.
7. Map transport routes and future enrolments. Get an idea of how your catchment is changing.