Trends across Australian Education sectors:

Census Results 2006 to 2011(16)
ABS School Census 1998 to 2016
My School Fees 1998 to 2016
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

Since the GFC the Market Share for Govt schools has looked like a ski jump, while both the Catholic and Ind market share figures have fallen.

On previous trends, the Govt sector would have had 110,000 fewer students in 2016, the Catholic sector 30,000 more and the Independent sector an additional 80,000 students.
GFC impact on three sectors

Since the GFC in 2008 the Australian State School sector has risen steadily, first at the expense of the Independent sector and since the end of the mining boom, at the expense of the Catholic sector.
Since the GFC in 2008 the Queensland Govt School sector has risen steadily, first at the expense of the Independent sector and since the end of the mining boom, at the expense of the Catholic sector.

In 2016, the Govt sector continued its upward climb at the expense of both the Catholic and Ind sectors.
GFC impact on Resource States

Year on Year changes in Independent school enrolments are an excellent social indicator of the health of Australia’s aspirational middle classes, and these figures are now flatlining nationally and in steady decline in the resource states of WA and Qld.
GFC impacts Manufacturing States

P-12 Catholic Year on Year Market Share Manufacturing States

Year on Year changes in Catholic systemic school enrolments are an excellent indicator of health of the jobs market for younger middle class families, and these enrolment figures are now well into negative territory in the manufacturing states of Victoria and South Australia.

Digital disruption is hollowing out these jobs across Australian middle class suburbs.
Trends across Australian Independent sector by My School Fees:

2008 to 2016
Independent School enrolments Australia 2008 to 2016 by Ind Fees charged

From 2008 to 2016 three quarters of the increases in Ind enrolments have been in the bottom two fee quartile of schools by student numbers. These schools have been in below average SES areas where jobs growth was solid.

One in eight new students have enrolled in very high fees schools in asset-rich, inner suburbs, with growth promoted by lower interest rates and the wealth effect.

Growth has been flat for average fee schools across middle class and professional suburbs.
Low fee Growth stops in 2016

In 2016 enrolment growth in Independent schools sagged in both the bottom quartile and the third quartile, as tradie jobs were shed in resource states and clerical jobs faded across middle class and aspirational suburbs.

Growth shifted to very high fee schools where older, established families had grown assets in equities and property from low interest rates and the wealth effect.
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

Australia has about 3.4 millions jobs held by Tradies and Clerical/Admin workers and this total has not changed significantly since the GFC in 2008, despite growth of about 1.8 million in the total workforce.

Since the GFC, the percentage of the workforce held by this classic working family group, has been eroded by digital disruption from 31 percent, to 27.9 percent, removing 370,000 jobs from the economy.

This combined demographic makes up about 22 percent of Independent school parents, so is reasonable to infer this decline in middle class jobs has pulled about 80,000 students from Independent Schools and more from Catholic schools.
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.
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.