Australian Development Strategies'

DEMOGRAPHIC ANALYSIS OF SCHOOL ENROLMENTS
2015 SCHEDULE

Marketing Strategies for Educational Institutions
About ADS Reports

How well is your school meeting the needs of your community? ADS Reports provide strategic insight into Your Students, Your School and Your Market compared to local and national benchmarks. Reports available include -

Demographic Review

A review of enrolments providing key information on enrolment origin, market share, price competititiveness, socio-economic status and population trends.

Strategic Profile

All the elements of the Demographic Review enhanced by a unique demographic profile of your school benchmarked against your sectoras a whole.

5 year Plan

The 5 year plan includes on-going annual monitoring of your enrolments and includes a Demographic Profile, Demographic Review and interim annual updates.

Profile Insights

Your Students

Demographic profiling of your school's students and parents such as age, income or employment.

Which local residents are more likely to send their children to your school?
How much do they earn?
Are they in secure jobs?
Can they afford your school?
Do they need a second income to pay for school fees?
What religion are they?
Who isn't likely to send their child to your school and why?
What are their education preferences?

Your School

Reports highlight how your school differs from other Independent schools across Australia.

How is your school's profile different from other independent schools?
How does the socio-demographic status of your parents compare to benchmarks?
Are your enrolments vulnerable to downturns in the economy? Or increases in fuel prices or interest rates?
Are you missing out on any opportunities to increase your market share?

Your Market

Analysis of your major and minor catchment areas and local and demographic trends.

How is your school's catchment different from the rest of the country?
What are the main demographic drivers for your local community and economy?
Are you getting your students from groups which are stronger in your major catchment?
Or are you trying to get your students from groups which are few and far between in your local streets?
ADS Expert Team

Professional Staff

John Black and Phil Henry have worked in partnership for over a decade to develop and refine the educational modelling services offered today.

John Black
Chief Executive
Australian Development Strategies

John has been CEO of Australian Development Strategies since 1990, specialising in demographic profiling of Independent schools, the Australian labour market and social and economic trends.

As an Australian Labor Party researcher for South Australian Premier Don Dunstan in 1974-77, John developed the demographic research and marginal seat campaign strategies which were later adopted by all major Australian political parties.

As researcher for then Federal ALP Leader Bill Hayden in 1981 he was the first person to apply computer software to these demographic profiling techniques, to identify and locate swinging voter groups for Labor’s 1983 campaign, which saw Bob Hawke elected Australian Prime Minister.

John is Founder Member of the Board of the Australian Sports Anti-Doping Agency, a demographic profiler and opinion writer for The Australian and a mentor for Griffith University.

Phil Henry
Director
Business Geographics Pty Ltd

Phil Henry is the Managing Director of Business Geographics - a company he founded in 2004. He has worked with John on education projects since then. Business Geographics is a boutique location research company specialising in the education sector and the childcare industry in Australia and New Zealand.

Business Geographics is an industry leader in childcare research. Phil works with some of the nation’s largest childcare operators and management groups providing due diligence for childcare centre developments and acquisitions.

Phil Henry has two decades of experience helping businesses unlock the strategic value of geographic information to improve business processes, acquire customers, manage growth and make more informed decisions.

Phil attended an independent school in Brisbane before obtaining a Bachelor of Business from Queensland University of Technology.
This report provides a useful regular check-up, between the bigger five yearly strategic profiles. It picks up on recent changes to your enrolments and changes to the SES of both your catchment and your school’s parents. We look at market share, price competitiveness, fees, population growth, all by small scale SA1 maps showing your major and minor catchments and the location of your competitors.

The summary tables and fees distribution curve provide both an overview of your school’s fees, income, enrolment numbers and also some context for how your fees fit into the fee ranges recorded in your catchment. It also tells you how your enrolments may have changed across the different fee ranges in the fees curve.

We update our fee and enrolment model every few years, when we are confident of both enrolment changes by sector and CPI increases for Education. We also amend the original data every five years for the Census, which fixes the distribution of enrolments by sector at that time, and every six years for the Household Expenditure Survey, which updates parent spend on education for each of the three sectors.
Above are descriptions of the maps included in the ADS Demographic Review:

Geo-coding of Enrolments by SA1
We geo-code your students and map current enrolments by fine grained Statistical Area 1. So you see where your students currently live.

Define Major and Minor Catchments
We calculate and map these enrolments into catchments, so you can determine the closest viable priority areas for future enrolment.

Changes in Enrolment Patterns
If we have data from a previous year, we will track recent changes in enrolment patterns by SA1s, so you can monitor changes in the catchment.

Predicted Private School Enrolments
We present the distribution of all potential target students across your catchment in the context of a mature and price competitive marketplace.

Residual Private School Enrolments
We show where private school enrolments may have been affected by price competition or by a lack of this competition in a developing local market.

Range of Predicted Private School Fees
To show the range of predicted fees across your catchments, in a mature competitive market, we map predicted independent school fees by SA1.

Current Market Share Analysis
We map your enrolments by SA1 as a percentage of current actual estimated private P-12 school enrolments. This latter figure is updated annually.

Measure Price Competitiveness
We compare your fees to the predicted affordable private school fees to determine if your school is vulnerable to economic shocks or to new entrants.

Children Aged under 5
The distribution of children aged under 5 (pre-school-aged) is mapped to show neighbourhoods where future school enrolments will come from.

Socio-economic Status (SES) Scores
We map SES scores by SA1 showing the impact of enrolments on your SES scores and determine your current estimated SES.

Historic Population Growth
Historic population growth is mapped to show recent population growth trends (increases and declines) across your catchment.

OPTIONAL: Transport Based Maps
Optional maps showing Bus Routes and/or school-based transport networks are available to help plan or optimise transport services.
Demographic Review Charts

The ADS Demographic Review also includes Excel charts as detailed below.

These charts will vary from school to school due to the different demographic nature of the catchments. Each Demographic Review will include six (6) to eight (8) charts.

Households and Population Summary

Major and minor catchment summaries of households and population, including recent population growth. Our benchmark for a viable 800 plus, medium fee, co-ed P-12 school is a major catchment of some 100,000 persons, which normally provides a total private or independent enrolment potential of about 2000 students.

Socio-Economic Status (SES) Scores

SES scores by catchment and your school’s estimated SES score. We are checking here on the extent to which your school has been attracting enrolments from the higher SES homes in the street. This leverage is a measure of the desirability of your school but it also restricts your potential student numbers from your catchment.

Fees Analysis

The estimated total fees spend for Government, Catholic and Independent school students in your catchments. This also tells you what proportion of the total spend you are attracting.

FIGURE: LOCAL SECTOR ENROLMENTS BY INDEPENDENT SCHOOL FEES
Fee Modelling

Fee modelling by catchments, including observed, predicted and residual fees for Government, Catholic and Non Govt, showing the extent to which local Non Govt fees are affordable, according to the known economic data about families in your catchments.

Enrolment Modelling

Enrolment modelling by catchments, including observed, predicted and residual Government, Catholic and Non Govt enrolments. This shows the extent to which fees and competition have been impacting on the three school sectors in your catchment.

Fee Distribution Charts

Fee distribution charts of current enrolments by Non Govt fee ranges per CCD for your school and for all private schools in your school catchment, to show where your school fees and numbers sit in the local and national bell curve.

For higher fee schools, it is pretty handy to know just how much you can increase fees before you start to run out of target parents within a viable commute your school.

We also show your school's enrolment changes by fee ranges if we have completed earlier profiles for your school, so you can see if you have been losing students from any specific fee range.

FIGURE: AUSTRALIAN & SAMPLE SCHOOL ENROLMENTS BY INDEPENDENT SCHOOL. FEES
Summary

This report provides the catchment summary tables, fee distribution figures and maps contained in the demographic review, plus the strategic oversight contained in a **unique profile of your school’s parents and students**. A fine grained demographic profile of your parents and their children is provided through stereotype tables and then 40 excel charts, covering: their educational background, their age and income, relevant cultural antecedents including religion, their occupation and employment, their home and work, and a series on family demographics and budgets and assets and debts.

This picture is benchmarked against the Australian national Independent or Catholic sector profile for the same demographic variables. Means are also provided in the profile charts, so you can see not just how well your school is performing among (say) 10-14 year olds, but how many of them live in your catchment, compared to national averages.
Description

In addition to the ADS Demographic Review features, the Strategic Profile incorporates a more complex set of demographic and fee analyses to facilitate long-term planning.

In addition to the demographic stereotype and profiles, this detailed study uses statistical analysis to produce a predicted enrolment figure matching your school profile which we then map for every small scale Statistical Area Level 1 (SA1) in your catchment.

You can compare this predicted figure with your actual enrolments to see where you can find the maximum number of parents and students exactly matching your school demographic profile. We can also provide an optional bus route package to help you get them to your school.

Report Contains

Overview  Catchment Analysis  Stereotypes  Correlation Charts  Targeting Maps

Overview

Includes an Introduction and an Executive Summary. This pulls together the themes of the full report into a two to five page summary. A Background and Methodology explains what we do, how we do it and what we look for, including levels of significance.
Catchment Analysis

This usually has five tables, three fee distribution curves, two maps and two charts. These include:

- Major and minor catchment summaries of households and population, including recent population growth. Our benchmark for a viable 800 plus, medium fee, co-ed P-12 school is a major catchment of some 100,000 persons, which normally provides a total private or independent enrolment potential of about 2000 students.

- SES scores by catchment and your school's estimated SES score. We are checking here on the extent to which your school has been attracting enrolments from the higher SES homes in the street. This leverage is a measure of the desirability of your school but it also restricts your potential student numbers from your catchment.

- The estimated total fees spend for Government, Catholic and Independent school students in your catchments. This also tells you what proportion of the total spend you are attracting.

- Fee modelling by catchments, including observed, predicted and residual fees for Government, Catholic and Non Govt, showing the extent to which local Non Govt fees are affordable, according to the known economic data about families in your catchments.

- Enrolment modelling by catchments, including observed, predicted and residual Government, Catholic and Non Govt enrolments. This shows the extent to which fees and competition have been impacting on the three school sectors in your catchment.

- Fee distribution charts of current enrolments by Non Govt fee ranges per SA1 for your school and for all private schools in your school catchment, to show where your school fees and numbers sit in the local and national bell curves. For higher fee schools, it is pretty handy to know just how much you can increase fees before you start to run out of target parents within a viable commute your school. We also show your school's enrolment changes by fee ranges if we have completed other profiles for your school, so you can see if you have been losing students from any specific fee range.

- Two detailed SA1 maps showing enrolment origins by SA1 and major and minor catchments and competing schools from all sectors.

- Two charts comparing the key variable means in your catchment with the means for Australia. This gives you a two page summary of the demographics which distinguish your catchment from the rest of the country.

Stereotypes

Tables show how your catchment demographics compare to Australia, how your parents and students stand out from other families in the catchment, and how your school profiles can be distinguished from that of the typical Australian Independent or Catholic profile.
Correlation Charts

Some 40 plus excel charts showing profiles and means of key variable groups for target school, benchmarked against relevant Australian figures for males and females by current Education, Fees by Sector, Parental Education, Field of Study, Qualifications, Age, Income, Birthplace, Language at Home, Religion, Occupation, Industry, Employment, Web Connections, Parental Commute to Work, Tenure, Mortgage, Rent, Cars at Home, Marital Status by Age, Family Type, Family Stats, Persons at Home, Women and children by Age, Family Budgets, Sources of Income, Sources of Debt, Transfer Payments, Assets, Selected Spends and Vote.

Targeting Maps

Targeting Maps show transport networks, population growth, market share, competitiveness, SES scores and changes to SES scores and competitor schools, all by small scale SA1 maps. For each school we also use statistical modelling to predict an enrolment figure for each SA1 in your major and minor catchment and we compare this predicted figure with your actual enrolments to see where you can find the maximum number of parents and students exactly matching your school demographic profile.
Client Testimonials

Over the last 10 years, ADS has worked with over 60 individual schools and independent school associations (many on an ongoing basis), providing detailed demographic profiles and review. Read what some of our clients have to say -

Reg Kernke
Deputy Executive Director - Anglican Schools Office QLD

“Representing a mainstream church that owns and monitors several large independent schools always presents problems when identifying and quantifying the business risk around the enrolment demands for the schools. Operationally enrolment demands will drive 100% of revenue and over 70% of expenses. I have been using the ADS school profile model for over 7 years and the analysis on enrolment numbers and school fee affordability provides real and logical answers to those problems of business risk identification and quantification. This valuable business tool costs about the same as the annual revenue of a single enrolment”.

Pastor Ron Woolley
Headmaster - Citipointe Christian College

“Our College has used the services of John Black (ADS) for many years now, and reliable statistics with great interpretation has given our Board and Executive greater confidence about the marketplace than we could possibly have otherwise. Every school should be watching its market and demographics closely, and in this field, the work of John Black (ADS) is outstanding”.

Steve Croft
Head of College - Springfield Anglican College

“ADS demographic profiling has helped us focus marketing initiatives in areas where we could make the biggest enrolment gains. ADS also coordinated a follow up phone survey which was valuable in a number of ways. It lead to several parents contacting the College for more information, assisted the College to better understand the thinking behind the decision making of parents in the local area and provided a new perspective on current and future bus routes. I would recommend the process to any school looking for new insights into how to gain enrolments”.

Geoff McLay
Principal - West Moreton Anglican College

“As a result of the work we have done with ADS and Business Geographics, our approach to future enrolment recruitment has become far more strategic, focussed and efficient. In particular the geo-coding of enrolments has enabled us to recalibrate our bus runs... so as to maximise service to families with enrolled students in 2015. Really useful data.”
# Pricing

## Demographic Review

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<th>Price</th>
<th>18 PAGES</th>
<th>11 MAPS</th>
<th>6 CHARTS</th>
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This report provides a useful regular check-up, between the bigger five yearly strategic profiles. Analyses market share, price competitiveness, fees, population growth, all by small scale SA1 maps showing your major and minor catchments and the location of your competitors.

## Strategic Profile

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<th>80 PAGES</th>
<th>10 MAPS</th>
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In addition to all the elements of the Demographic Review, this report provides the catchment summary tables, fee distribution figures and maps contained in the demographic review, plus the strategic oversight contained in a unique profile of your school's parents and students.

## Five Year Plan

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<th>Price</th>
<th>DEMOGRAPHIC PROFILE</th>
<th>STRATEGIC REVIEW</th>
<th>ONLINE MAPS</th>
<th>ANNUAL TRENDS</th>
<th>LABOUR MARKET UPDATES</th>
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The Five Year Plan is our most popular and value for money schools package. It begins with a Strategic Profile in Year One to provide maximum value to each school from the outset. A Demographic Review is then completed in Year Five to evaluate progress. In between, we provide annual geo-codes and on line maps of enrolments with comparisons to previous years' figures to measure the progressive impact of marketing activities and enrolment trends. We also include regular labour market updates to take the pulse of the economy in your catchment. The Five Year Plan allows clients to distribute costs over the term of the package and to track changes over time.

## Optional Items / Add-ins - P.O.A.

- Additional Maps - e.g. drive time, growth, etc.
- Supply of Enrolment projections to 2018
- Large Format Printed Wall Maps
- Bus Route Mapping and Optimisation
- Online Maps - for PC, mobile and tablet
- Telephone marketing for Open Days etc.

* Plus applicable GST
**Per Annum (plus applicable GST) subject to a service agreement.
ADS DEMOGRAPHIC ANALYSIS OF SCHOOL ENROLMENTS
2015 SCHEDULE

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