

Overseas Student Enrolments

Key Points

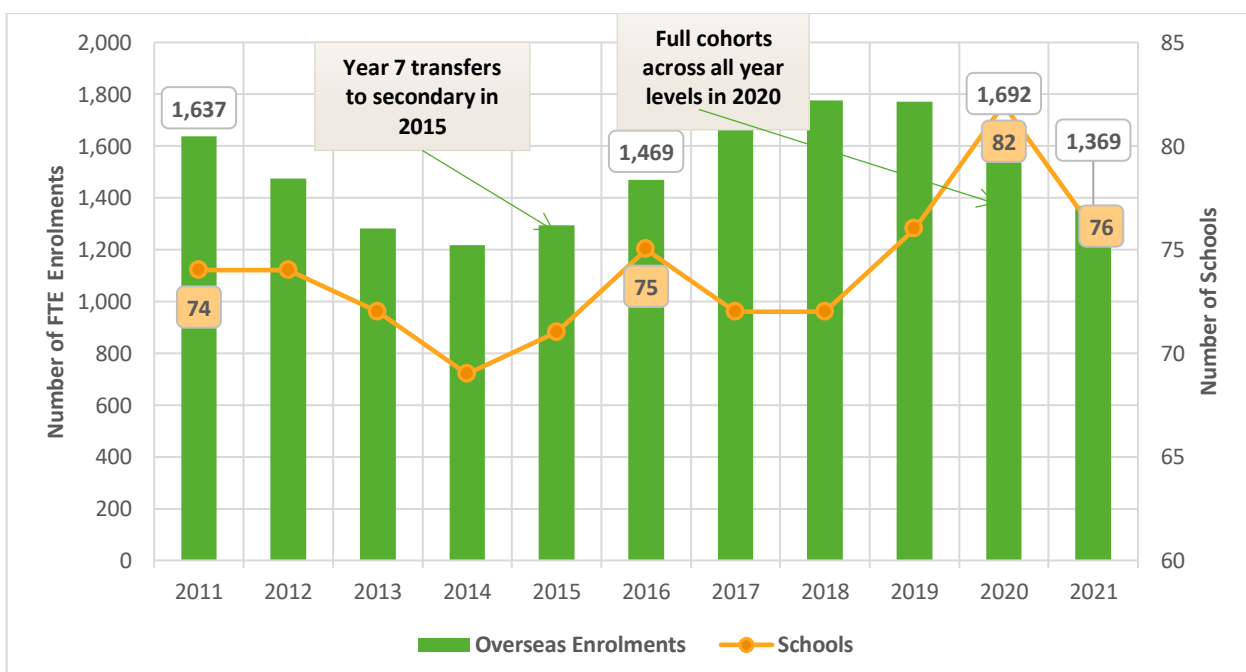
Not surprisingly given the COVID-19 pandemic, overseas student enrolments reduced significantly from 2020 to 2021. Overseas student enrolments at independent schools decreased by 323 students in this period, decreasing from 1,692 students in 2020 to 1,369 students in 2021 (-19%). The number of schools catering for overseas students also decreased from 82 schools in 2020 to 76 schools in 2021. Catholic school enrolments decreased in this timeframe by 35%.

Significant decreases in progression rates from Year 9 to 10, and from Year 10 to 11 occurred from 2020 to 2021, with progression rates for these transitions at the lowest levels evidenced in the past decade. The progression rate from Year 11 to 12 was the second lowest experienced in the past decade and slightly higher than the 2019 to 2020 rate.

Enrolments

In 2021, the independent schooling sector catered for 1,369 overseas students, a significant decrease from 1,692 overseas student enrolments in 2020. This decrease of 323 overseas student enrolments is equivalent to a 19.1% decrease in overseas enrolments in the past year (refer Figure 1). In the previous year, from 2019 to 2020, overseas enrolments decreased by 78 students.

Figure 1: Overseas Student Enrolments & Number of Schools Attended, 2011-2021

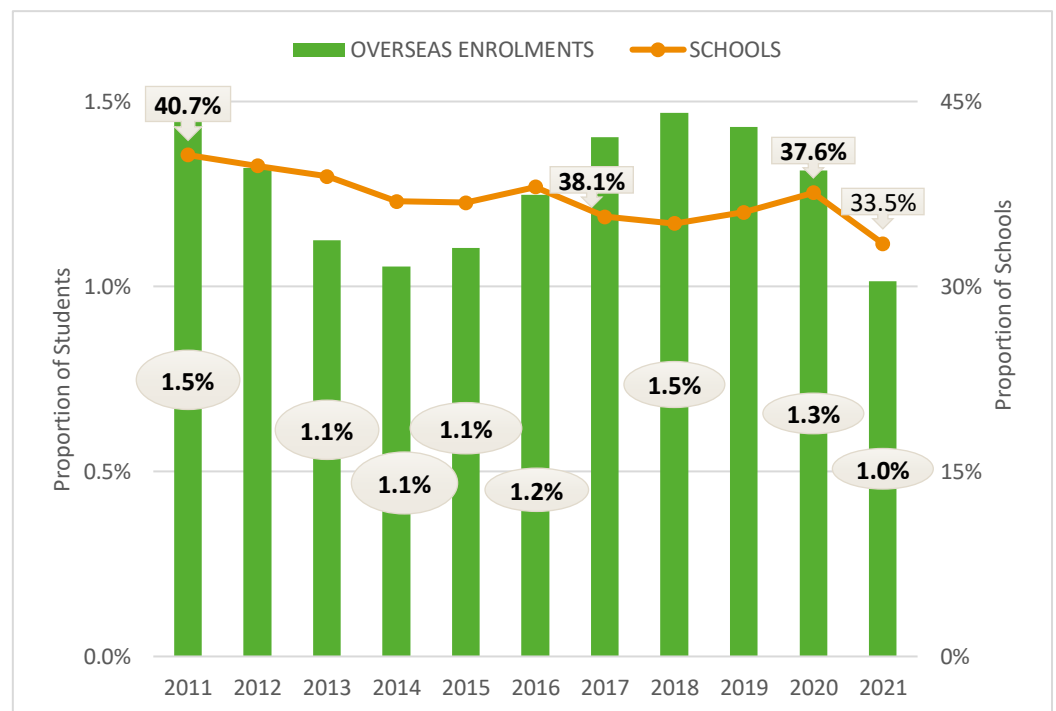


Over the past decade, from 2011 to 2021, overseas student enrolments reduced by 268 students; decreasing from 1,637 students in 2011 to 1,369 students in 2021. In the interim period however, enrolments reduced to a low of 1,217 students in 2014 before commencing to increase to a peak of 1,777 students in 2018.

There were six fewer schools catering for overseas students in 2021 than in 2020 (76 schools in 2021 compared to 82 schools in 2020). This is the second highest number of schools that have catered for overseas students in any year of the past decade and represents 33.5% of all independent schools in 2021. In preceding years, from 2011 to 2020, the number of schools catering for overseas students ranged from 69 to 77, with the highest proportion of independent schools catering for overseas students in 2011, when 40.7% of all independent schools at that time catered for overseas students (refer Figure 1, previous page and Figure 2 below).

Figure 2: Proportion of Overseas Students of Independent School Enrolments, 2011-2021

In 2021 overseas student enrolments represented 1.0% of all FTE enrolments, the lowest proportion in the 10-year period from 2011 to 2021 (refer Figure 2). The highest proportion of independent school students represented by overseas students occurred in 2011 and 2018 (1.5%), while overseas students represented low proportions of independent school students in the period from 2013 to 2015 (1.1% of all independent school students).



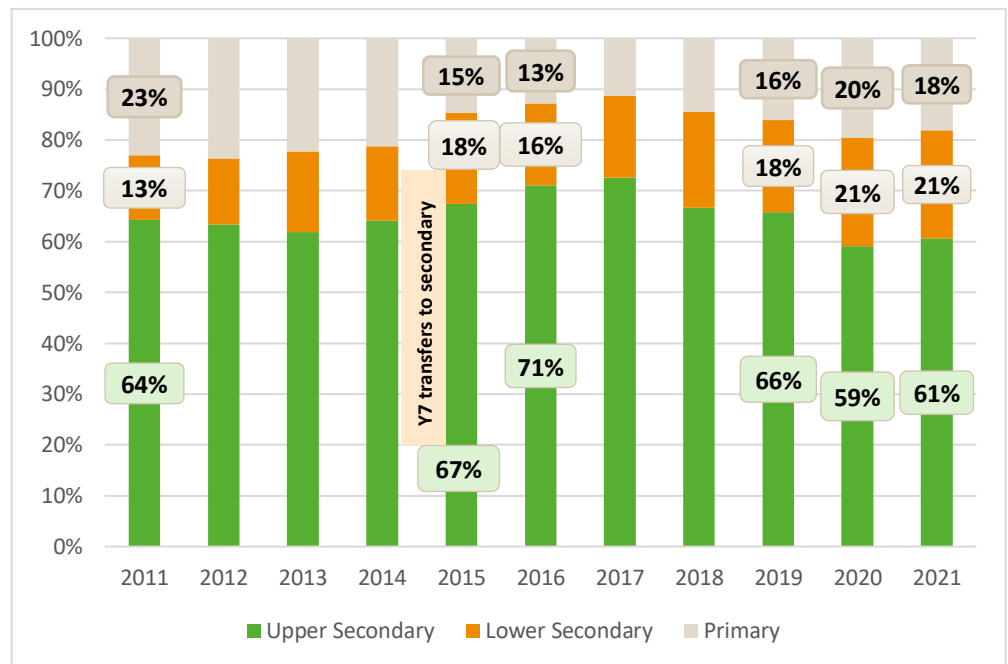
By Year Level

Distribution

The highest numbers of overseas students are enrolled in secondary year levels.

In 2011, when primary referred to Prep to Year 7 and secondary referred to Year 8 to 12, 23% of overseas students were in primary and 77% were in secondary year levels, with 64% of students in upper secondary year levels (Years 10 to 12) and 13% of students in lower secondary (Years 8 to 9).

Figure 3: Proportion of Overseas Students, 2011-2021



With the transfer of Year 7 to secondary in 2015, the proportion of overseas students in primary year levels decreased to 15%, while the proportion of overseas students in secondary year levels increased to 85% (67% in upper secondary and 18% in lower secondary). In 2021, the proportion of overseas students enrolled in primary increased to 18% and the proportion in lower secondary increased to 21%, reflecting significant increases from 15% and 18% respectively in 2015. The proportion of overseas students in upper secondary experienced a commensurate decrease from 2015 to 2021; with 67% of overseas students enrolled in upper secondary in 2015 reducing to 61% in 2021 (refer Figure 3).

Enrolments

The number of overseas students in primary schooling has increased significantly in the 2015 to 2021 period, when primary refers to Prep to Year 6. In this timeframe, primary enrolments increased from 190 students in 2015 to 248 students in 2021; a 31% increase (+58 students). With the exception of Year 1, enrolment growth occurred in all primary year levels over the 2015 to 2021 period. Highest growth in primary enrolments occurred from 2017 to 2018 (+68 students), followed by the 2019 to 2020 period (+46 students) (refer Table 1).

Overseas student enrolments decreased in lower secondary year levels in the 2020 to 2021 period (-69 students) but did increase overall in the period from 2015 to 2021 (+61 students; equivalent to a 26% increase since 2015). As was the case in primary, growth was experienced in enrolments over the 2015 to 2021 period in Year 7 and Year 8, while Year 9 and Year 12 were relatively stable and Year 10 and Year 11 overseas enrolments decreased. Highest growth in lower secondary enrolments occurred from 2017 to 2018 (+66 students).

Table 1: Independent School Overseas Student Enrolments by Year Level, 2011-2021

| Year | Prep | Y1 | Y2 | Y3 | Y4 | Y5 | Y6 | Y7 | Y8 | Y9 | Y10 | Y11 | Y12 | TOTAL | Primary | Lower Sec. | Upper Sec. |
|------|------|----|----|----|----|----|----|----|-----|-----|-----|-----|-----|--------------|---------|------------|------------|
| 2011 | 28 | 38 | 45 | 36 | 40 | 53 | 60 | 77 | 79 | 130 | 221 | 431 | 399 | 1,637 | 377 | 430 | 1,051 |
| 2012 | 23 | 34 | 38 | 36 | 38 | 47 | 64 | 68 | 94 | 97 | 203 | 361 | 371 | 1,474 | 348 | 394 | 935 |
| 2013 | 19 | 22 | 30 | 28 | 35 | 42 | 45 | 64 | 78 | 124 | 184 | 303 | 306 | 1,281 | 285 | 386 | 793 |
| 2014 | 34 | 17 | 20 | 29 | 27 | 43 | 34 | 55 | 80 | 98 | 220 | 298 | 262 | 1,217 | 259 | 398 | 780 |
| 2015 | 15 | 30 | 18 | 27 | 29 | 30 | 41 | 44 | 79 | 108 | 213 | 371 | 289 | 1,294 | 190 | 231 | 873 |
| 2016 | 21 | 21 | 25 | 20 | 31 | 32 | 39 | 56 | 62 | 118 | 298 | 424 | 322 | 1,469 | 189 | 236 | 1,044 |
| 2017 | 20 | 18 | 20 | 31 | 28 | 36 | 35 | 62 | 88 | 120 | 343 | 476 | 392 | 1,669 | 188 | 270 | 1,211 |
| 2018 | 24 | 28 | 37 | 35 | 39 | 41 | 52 | 58 | 98 | 180 | 331 | 483 | 371 | 1,777 | 256 | 336 | 1,185 |
| 2019 | 20 | 33 | 36 | 40 | 42 | 64 | 50 | 83 | 100 | 137 | 340 | 450 | 375 | 1,770 | 285 | 320 | 1,165 |
| 2020 | 22 | 26 | 48 | 45 | 46 | 65 | 79 | 89 | 109 | 163 | 281 | 422 | 297 | 1,692 | 331 | 361 | 1,000 |
| 2021 | 16 | 18 | 25 | 40 | 32 | 50 | 67 | 78 | 103 | 111 | 203 | 336 | 290 | 1,369 | 248 | 292 | 829 |

Note: Prior to 2015 primary refers to Prep to Year 7 and lower secondary to Years 8 & 9.

While both primary and lower secondary enrolments decreased from 2020 to 2021, enrolments in Years 10 to 12, those year levels which attract the highest number of overseas enrolments decreased more significantly. In 2020 there were 1,000 upper secondary students. In 2021 overseas student enrolments in upper secondary years decreased by 171 students to be in the order of 829 students. This decline complemented the decline in primary and lower secondary year levels, resulting in an overall decline of 323 students in overseas enrolments. Over the 2015 to 2021 period however, overseas student enrolments did increase (+75 students; 5.8%).

Trends in Progression

Progression identifies the extent of movement of students into and out of individual year levels. This reflects a comparison of the number of students in one year level to the number of students that were in the year level that was one year level lower in the preceding year (e.g. a comparison of Year 9 in 2021 to the number of students in Year 8 in 2020). In the case of overseas students, these progression levels provide an indication of the size of the overseas student market that independent schools attract into schools annually.

In the past decade the number of students entering schools has ranged from a low of -42 students in 2021 to a peak of 502 students in 2017 (refer Table 2).

Since this peak in 2017, the net gain of students annually has consistently decreased to the extent that there were 42 fewer students in Year 1 to 12 in 2021 than were in Prep to Year 11 in 2020.

Table 2: Overseas Students, Apparent Progression by Year Level, 2011-2012 to 2020-2021

| Period | Apparent Progression (Number) | | | | | | | | | | | | Apparent Progression Rate (%) | | | Net Incoming Students |
|---------|-------------------------------|------|------|------|------|------|------|------|------|-------|--------|--------|-------------------------------|--------|--------|-----------------------|
| | P-Y1 | Y1-2 | Y2-3 | Y3-4 | Y4-5 | Y5-6 | Y6-7 | Y7-8 | Y8-9 | Y9-10 | Y10-11 | Y11-12 | Y9-10 | Y10-11 | Y11-12 | |
| 2011-12 | 6 | 0 | -9 | 2 | 7 | 11 | 8 | 17 | 18 | 73 | 140 | -60 | 156% | 163% | 86% | 213 |
| 2012-13 | -1 | -4 | -10 | -1 | 4 | -2 | 0 | 10 | 30 | 87 | 100 | -55 | 190% | 149% | 85% | 158 |
| 2013-14 | -2 | -2 | -1 | -1 | 8 | -8 | 10 | 16 | 20 | 96 | 114 | -41 | 177% | 162% | 86% | 209 |
| 2014-15 | -4 | 1 | 7 | 0 | 3 | -2 | 10 | 24 | 28 | 115 | 151 | -9 | 217% | 169% | 97% | 324 |
| 2015-16 | 6 | -5 | 2 | 4 | 3 | 9 | 15 | 18 | 39 | 190 | 211 | -49 | 276% | 199% | 87% | 443 |
| 2016-17 | -3 | -1 | 6 | 8 | 5 | 3 | 23 | 32 | 58 | 225 | 178 | -32 | 291% | 160% | 92% | 502 |
| 2017-18 | 8 | 19 | 15 | 8 | 13 | 16 | 23 | 36 | 92 | 211 | 140 | -105 | 276% | 141% | 78% | 476 |
| 2018-19 | 9 | 8 | 3 | 7 | 25 | 9 | 31 | 42 | 39 | 160 | 119 | -108 | 189% | 136% | 78% | 344 |
| 2019-20 | 6 | 15 | 9 | 6 | 23 | 15 | 39 | 26 | 63 | 144 | 82 | -153 | 205% | 124% | 66% | 275 |
| 2020-21 | -4 | -1 | -8 | -13 | 4 | 2 | -1 | 14 | 2 | 40 | 55 | -132 | 125% | 120% | 69% | -42 |

The highest progression of overseas students from 2020 to 2021 occurred from Year 10 to Year 11 when there were 55 more students in Year 11 in 2021 than were in Year 10 in 2020. Next highest in-migration occurs from Year 9 to Year 10, with 40 more overseas students in Year 10 in 2021 than were in Year 9 in 2020.

When considering the Year 9 to 10 and Year 10 to 11 transition points, it is apparent that in-migration levels have consistently reduced in recent years. Since a peak of 225 students entering Year 10 in 2017, in-migration has reduced to 40 students in 2021, while since 2016 the number of students entering Year 11 has reduced from 211 to 55 students in 2021.

Year 11 to Year 12 progression is the only transition where there is a net loss of overseas students, indicated by progression rates of less than 100%. The lowest net loss of Year 11 students from schools occurred in 2015, when there were only nine fewer students in Year 12 in 2015 than were in Year 11 in 2014. This corresponds to a 97% apparent progression rate. The greatest loss of Year 11 students occurred from 2019 to 2020, with Year 12 students in 2020 representing only 66% of Year 11 students in 2019, representing a net loss of 153 students.

With respect to primary year levels, relatively small numbers of overseas students entered all year levels from 2017 to 2020. However, from 2020 to 2021, modest increases occurred only from Year 4 to Year 5 and from Year 5 to Year 6, while modest losses occurred for all other primary year levels. In 2021 there were four more Year 5 students than in Year 4 in 2020, and 13 fewer Year 4 students in 2021 than in Year 3 in 2020. This compares to a net gain of 23 Year 5 students from 2019 to 2020 and a net gain of six Year 4 students from 2019 to 2020.

Size of Enrolments

Of the 76 schools catering for overseas students in 2021, two schools catered for more than 100 overseas students and a further four schools catered for more than 50 to 100 overseas students (refer Table 3). These six schools catered for 42% of overseas student enrolments at independent schools. A further 46% of overseas students attended 25 schools where overseas student enrolments ranged from more than 10 students to 50 students. The balance of 12% of overseas students attended 45 schools where overseas student enrolments totalled 10 or fewer students.

Table 3: Size of Overseas Student Enrolments, 2021

| Overseas Student Enrolment Range | Number of Schools | Percentage of Schools | Percentage of Overseas Students |
|----------------------------------|-------------------|-----------------------|---------------------------------|
| None | 151 | 67% | 0% |
| >0-2 | 17 | 7% | 2% |
| >2-5 | 18 | 8% | 5% |
| >5-10 | 10 | 4% | 5% |
| >10-25 | 17 | 7% | 22% |
| >25-50 | 8 | 4% | 24% |
| >50-100 | 4 | 2% | 21% |
| >100 | 2 | 1% | 21% |
| TOTAL | 227 | 100% | 100% |

Table 4: Overseas Student Enrolments as a Percentage of Each Schools' Total Enrolment, 2021

| Overseas Students as Percentage of Total Enrolment | Number of Schools | Percentage of Overseas Students |
|--|-------------------|---------------------------------|
| 0% | 151 | 0% |
| >0%-2.5% | 59 | 34% |
| >2.5%-5% | 12 | 33% |
| >5-10% | 4 | 20% |
| >10% | 1 | 13% |
| TOTAL | 227 | 100% |

In the majority of schools that catered for overseas students in 2021, overseas students represented 2.5% or less of the student body (59 schools). These schools catered for 34% of overseas students (refer Table 4).

A further 33% of overseas students attended 12 schools where the overseas student component represented more than 2.5% to 5% of the student body, while another four schools had >5-10% of total enrolments as overseas students together accounting for 20% of overseas students. One school had more than 10% of the schools' total student body as overseas students, catering for another 13% of overseas students.

Non-Government Sector Comparison

In 2021 there were 1,550 overseas students enrolled in either independent or Catholic schools. Catholic schools catered for 12% of these students (181 students). In the past year, from 2020 to 2021, overseas students attending non-government schools reduced by 422 students; decreasing from 1,972 students to 1,550 students. This is a 21% decrease. In this period, Catholic school enrolments decreased by 35% (-99 students), almost double the rate of decline in independent school enrolments (-19%).

Over the past decade, overseas student enrolments have reduced by 24%, decreasing from 2,027 students in 2011 to 1,550 students in 2021 (-477 students). Catholic school enrolments reduced by 54%, decreasing from 390 students to 181 students (-209 students). In the same timeframe, enrolments at independent schools decreased by 268 students (-16%).

As a consequence of the rate of decline in Catholic school enrolments being higher than that experienced by independent schools, Catholic schools have lost market share of overseas students that attend non-government schools.

Figure 4: Share of Overseas Student Enrolments, 2011-2021

In 2011, Catholic schools catered for 19% of overseas students attending non-government schools, reducing to 12% in 2021 (refer Figure 4).

In contrast, within a context of overall decline in overseas student enrolments, independent schools have increased market share from 81% in 2011 to 88% in 2021.

