

Enrolments

Key Points

Independent school enrolments increased by nearly 6,120 students, or 4.8%, from 2020 to 2021. This is the highest annual increase in recent years.

- Prep enrolments at independent schools increased by 391 students from 2020 to 2021 (5.1%). In contrast Prep enrolments in all schools in Queensland increased slightly from 2020 to 2021 (0.1%).
- Independent enrolments in the first year of secondary increased by 666 students or 5.4% from 2020 to 2021. Year 7 enrolments in all Queensland schools increased by only 21 students.

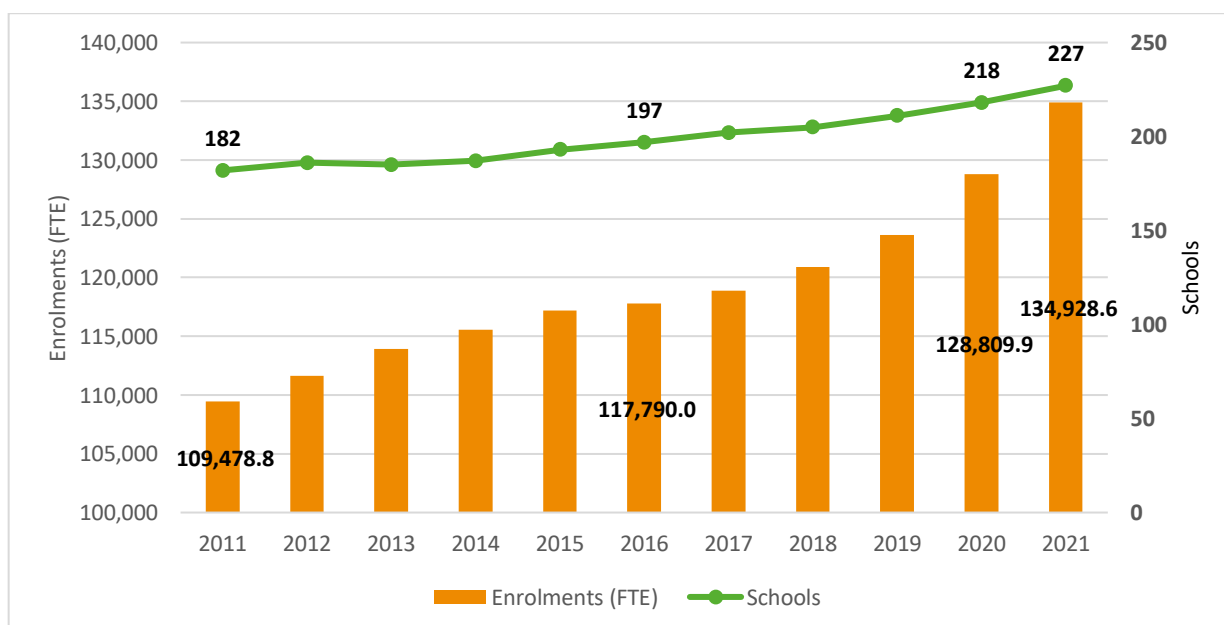
Independent school market share of total enrolments and Prep enrolments has increased each year since 2016, while a pattern of fluctuating market share is presented in Year 7 enrolments since 2016.

Over the past five years, from 2016 to 2021, the average annual growth rate in independent primary enrolments has been 2.2% compared to the average annual growth rate in secondary enrolments of 3.4%. The lower growth rate in primary is suggestive of a slowing of growth in secondary enrolments in the future.

Enrolments

Enrolments at independent schools in Queensland continued to increase, with the February Non-State School Census indicating full-time equivalent (FTE) enrolments in the sector reached 134,928.6 in 2021 (refer Figure 1). These enrolments were in 227 independent schools.

Figure 1: Independent School Enrolments & Number of Schools, 2011-2021



From 2020 to 2021, FTE enrolments in independent schools increased by 6,118.7 FTE enrolments; increasing from 128,809.9 enrolments in 2020 to 134,928.6 enrolments in 2021 (refer Table 1 below). This equates to a 4.8% growth rate, double the growth rate experienced from 2018 to 2019 when enrolments increased by 2.3% and higher than the 4.2% growth rate evidenced from 2019 to 2020 (refer Figure 2).

Since 2011, when FTE enrolments were in the order of 109,479 students, enrolments in the sector have increased by 21,450 FTE enrolments or 23.2% over the 10-year period.

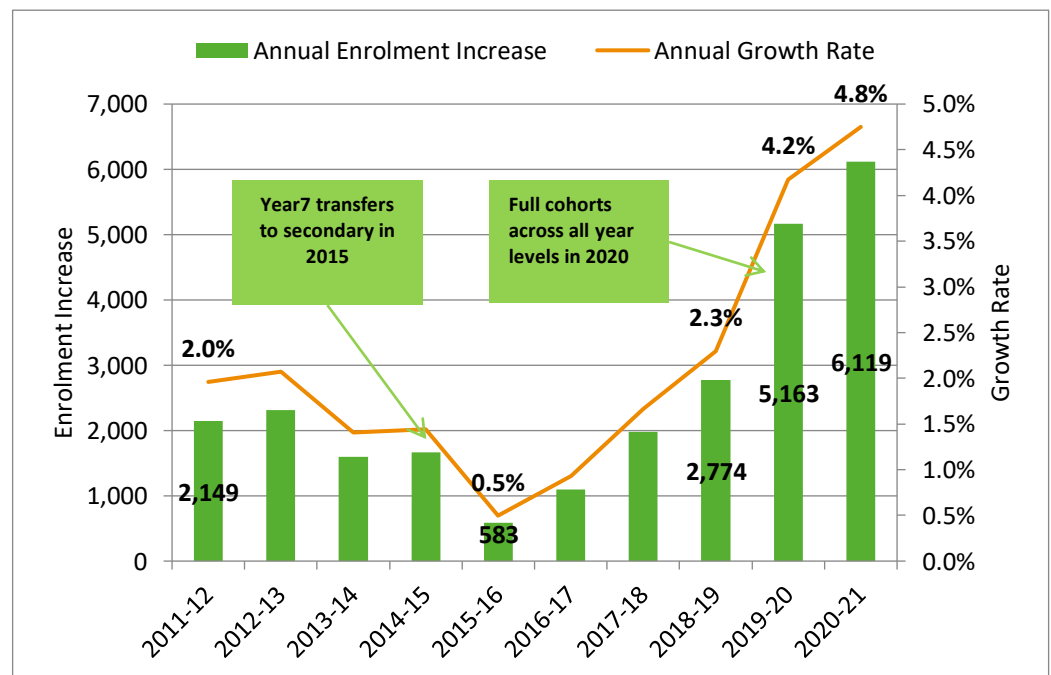
Table 1: Independent School Enrolments, 2011-2021

Year	Prep	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10	Y11	Y12	Ung.	TOTAL
2011	6,728	6,519	6,549	6,290	5,522	6,948	7,513	8,290	10,920	10,905	10,604	10,862	10,265	1,565.4	109,479
2012	7,092	6,942	6,688	6,858	6,779	5,897	7,685	8,840	11,052	11,029	10,954	10,925	10,588	299.6	111,628
2013	7,334	7,262	7,077	6,961	7,209	7,271	6,492	8,901	11,406	10,999	11,083	11,206	10,506	234.8	113,943
2014	7,479	7,356	7,371	7,311	7,403	7,719	7,820	7,323	11,092	11,311	11,029	11,334	10,828	166.1	115,543
2015	7,566	7,342	7,391	7,518	7,697	7,878	8,097	10,514	8,540	10,908	11,290	11,373	10,918	176.4	117,207
2016	7,190	7,362	7,370	7,423	7,894	8,131	8,199	11,017	10,595	8,566	11,065	11,858	10,935	186.2	117,790
2017	7,129	7,100	7,433	7,615	7,800	8,423	8,462	11,260	11,140	10,695	8,804	11,521	11,327	181.2	118,890
2018	7,314	7,118	7,305	7,741	8,070	8,423	8,982	11,655	11,539	11,360	10,934	9,242	10,944	246.8	120,873
2019	7,553	7,355	7,357	7,659	8,154	8,610	8,917	12,414	11,844	11,699	11,770	11,238	8,831	245.8	123,647
2020	7,716	7,606	7,510	7,679	8,091	8,840	9,138	12,283	12,703	12,090	12,241	12,177	10,480	254.6	128,810
2021	8,107	7,994	8,032	7,989	8,360	8,943	9,578	12,949	12,683	13,041	12,667	12,707	11,579	301.2	134,929

Notes: FTE enrolments have been rounded.

Italicised numbers refer to the smaller 2007 Prep cohort progressing through the grade structure.

Figure 2: Independent School Numerical Growth & Enrolment Growth Rates, 2011-2021



Both numerical growth and average growth from 2020 to 2021 are at the highest level experienced by the independent school sector in the past decade, from 2011 to 2021 (refer Figure 2).

Lowest levels of growth in the past 10 years occurred from 2015 to 2016, when enrolments increased by only 583 or 0.5%. Since this time, both numerical growth and average growth have increased consistently every year until 2020-21.

It should be noted that the significant growth in enrolments from 2019 to 2020, in part, reflects full cohorts being gained across all year levels in 2020. Prior to 2020, one grade each year was a partial cohort, reflecting the change to school commencement age in conjunction with the introduction of Prep in 2007. As indicated in Table 1 above, with all year levels being full cohorts in both 2020 and 2021, the rate of growth in the sector from 2020 to 2021 was 4.8% (+6,119 FTE enrolments). This is by far the highest level of growth experienced in the sector over the past decade.

Apparent Retention & Progression Rates in Enrolments

Retention and progression refer to the extent to which enrolments in the same year cohort continue schooling in the sector over time (e.g. the number of Prep students in the previous year is compared to the number of Year 1 students in the current year. A positive difference indicates a net gain of students while a negative difference indicates a movement of students out of the schooling sector).

Primary

For the third consecutive year there has been in-migration of Prep students into Year 1 in independent schools, with 278 more Year 1 students in 2021 than had been in Prep in 2020 (which became the Year 1 cohort in 2021). This is significantly higher than in-migration levels of 42 and 53 more Year 1 students in 2019 and 2020 than had been in Prep in 2018 and 2019 respectively. In the period from 2016 to 2018, net losses of Prep students occurred (refer Table 2 below).

The level of net in-migration of students into Year 1 to Year 6 also evidences an increase over time, with 3,452 more students in Year 1 to Year 6 in 2021 than were in Prep to Year 5 in 2020 (who became the Year 1 to Year 6 cohort in 2021). This represents a significant increase in the level of net in-migration of 2,177 more students in Year 1 to Year 6 in 2020 than were in Prep to Year 5 in 2019, and 1,463 more students in Year 1 to Year 6 in 2017 than were in Prep to Year 5 in 2016.

The highest level of in-migration from 2020 to 2021 was into Year 5, with 852 more Year 5 students in 2021 than Year 4 students in 2020. The Year 4 to Year 5 transition has been consistently the highest level of in-migration across all primary year levels for the entire five year period from 2016 to 2021. This in-migration, along with relatively high in-migration into Year 4, is considered in part to reflect a number of independent schools increasing capacity at a juncture point for middle schooling.

Table 2: Independent School Enrolments Apparent Retention & Progression Rates, 2016-2021

Period	Retention						Progression						Net In-migration	
	Prep-1	Y1-Y2	Y2-Y3	Y3-Y4	Y4-Y5	Y5-Y6	Y6-Y7	Y7-Y8	Y8-Y9	Y9-Y10	Y10-Y11	Y11-Y12	Y1-6	Y8-10
2016-17	-90	71	245	377	529	331	3,061	123	100	238	104%	96%	1,463	461
2017-18	-11	205	308	455	623	559	3,194	279	220	239	105%	95%	2,139	738
2018-19	42	239	354	413	540	494	3,432	189	160	410	103%	96%	2,082	759
2019-20	53	155	322	432	687	528	3,367	289	245	542	103%	93%	2,177	1,076
2020-21	278	425	478	682	852	737	3,811	399	338	577	104%	95%	3,452	1,315

Notes: FTE enrolments have been rounded.

Secondary

At the secondary level, independent schools gained students into all year levels from 2020 to 2021, with the exception of Year 12, with Year 12 in 2021 representing 95% of the Year 11 cohort in 2020. This proportion was at the higher end of the Year 11-12 progression rate range of 93% to 96% evidenced in the 2016 to 2021 period (refer Table 2 above). The Year 10-11 progression rate of 104% from 2020 to 2021 was more in line with the average progression rates that ranged from 103% to 105% in the 2016 to 2021 period.

In lower secondary year levels, in-migration has increased over time, as was the case in regard to primary. In 2021, there were 1,315 more students in Year 8 to Year 10 in 2021 than were in Year 7 to Year 9 in 2020 (who became the Year 8 to Year 10 cohort in 2021). Since 2016-17, when an additional 461 students entered Years 8 to 10, levels of in-migration into Year 8 to Year 10 have increased consistently.

The highest level of in-migration from 2020 to 2021 was into Year 10, with 577 more Year 10 students in 2021 than Year 9 students in 2020. The Year 9 to Year 10 transition has had the highest level of in-migration across lower secondary year levels in all recent periods, except for the 2017 to 2018 period when highest in-migration occurred from Year 7 to Year 8. High levels of in-migration into Year 10 is considered in part to reflect relatively high numbers of overseas students entering independent schools at a juncture point, as well as smaller numbers of boarding students and Special Assistance School students tending to enter independent schools at Year 10.

Future First Year of Secondary

In 2021, the number of Year 7 students entering independent schools from other schooling sectors, or from schools outside the State, overseas or home-schooling, was 3,811, more than the number of students in independent schools in Year 6 in 2020. This was the largest number of students that have entered the first year of secondary at independent schools in recent years, representing 6.3% of students that were attending other schooling sectors in Queensland in Year 6 in 2020 (refer Table 3 below). This proportion of Year 6 students attending other schooling sectors gained by the independent school sector into Year 7 is significantly higher than the proportion evidenced annually from 2016 to 2020. In the 2016 to 2020 period, the proportion ranged from 5.6% to 5.8%.

Table 3: Proportion of Year 7 Students Gained from Other Sectors, 2016-2021

	Migration into Year 7	Year	Y6 Students in Preceding Year in Other Sectors	Year	Proportion of Y6 Students Gained from Other Sectors
2016-17	3,061	2016	54,233	2017	5.6%
2017-18	3,194	2017	56,867	2018	5.6%
2018-19	3,432	2018	58,680	2019	5.8%
2019-20	3,367	2019	60,490	2020	5.6%
2020-21	3,811	2020	60,710	2021	6.3%

Note: FTE enrolments have been rounded

Based on Year 6 enrolments in 2021 at Catholic and State schools (62,029 students), and the independent sector gaining 6.3% of these students into Year 7 in 2022, the independent sector will gain an estimated 3,894 Year 7 students from outside the sector in 2022. As there were 9,578 Year 6 students attending independent schools in 2021, which are assumed to progress to Year 7 at independent schools, the addition of 3,894 Year 7 students from other sectors would

result in a Year 7 enrolment in the order of 13,472 students in 2022. This compares to 12,949 Year 7 students enrolled in independent schools in 2021.

Queensland Context

Patterns of enrolment growth and decline in independent schools need to be considered within the context of state-wide enrolment patterns. If, for example, enrolments in independent schools declined, while enrolments in all schools in the State increased, market share held by independent schools would reduce. Conclusions regarding enrolment decline in independent schools could suggest a lower proportion of parents are selecting independent schools (or insufficient capacity in areas where growth is occurring). If, however, enrolments in all schools in the State also declined, depending on the level of enrolment decline experienced in independent and all Queensland schools, independent school market share could increase, decrease or remain stable. Conclusions regarding decline in the independent school sector would differ accordingly.

Queensland School Enrolments

In 2021, there were 872,310 FTE enrolments in schools in Queensland, comprised of 478,262 primary school enrolments and 394,047 secondary enrolments (refer Table 4). Enrolments increased by 10,972 FTE students from 2020 to 2021; increasing from 861,337 students in 2020.

Table 4: Queensland FTE Enrolments, 2016-2021

Year	Prep	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10	Y11	Y12	Ungr.	TOTAL
2016	65,801	67,380	66,454	66,762	65,990	64,618	62,432	61,087	58,843	42,330	60,706	61,742	55,515	186	799,845
2017	65,019	66,173	67,825	67,060	67,459	66,916	65,329	62,904	61,961	58,991	43,651	60,313	57,060	181	810,842
2018	65,996	65,805	66,763	68,638	67,894	68,493	67,662	65,975	63,624	62,110	59,859	43,653	55,575	247	822,293
2019	66,222	66,755	66,637	67,697	69,615	68,883	69,407	68,295	66,523	63,832	63,070	57,993	40,423	246	835,596
2020	66,010	67,047	67,570	67,461	68,515	70,682	69,848	70,078	69,111	66,862	64,737	61,052	52,112	255	861,337
2021	66,088	66,550	67,713	68,353	68,166	69,621	71,607	70,099	70,591	69,172	67,279	61,861	54,908	301	872,310

Notes: Includes overseas students in non-government school sectors.
FTE enrolments are rounded.

It is of interest to note that in the past five years, from 2016 to 2021, primary enrolments increased at a much lower rate than secondary enrolments (4% increase in primary enrolments compared to 16% increase in secondary enrolments), while Prep enrolments have increased marginally by 0.4% over the same period. The lower growth rate in primary is suggestive of a slowing of growth in secondary enrolments in future years, as current primary students progress into secondary.

Prep Enrolments

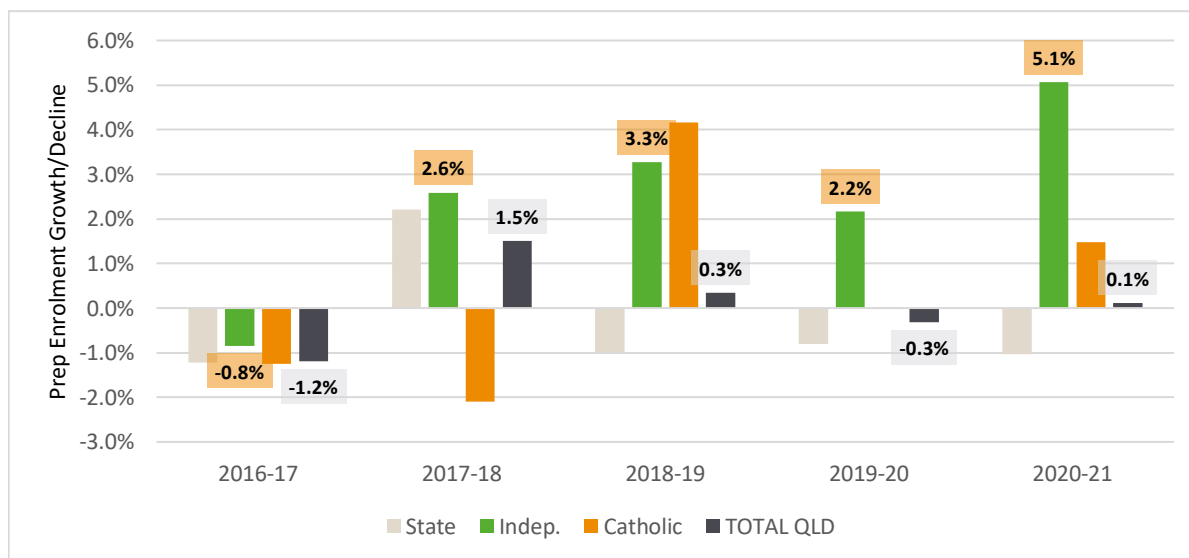
Trends in Prep intakes are a significant indicator of future enrolments trends, reflecting the numbers of children entering the schooling system.

Prep enrolments at independent schools increased by 391 students from 2020 to 2021 (5.1%); increasing from 7,716 enrolments in 2020, to 8,107 enrolments in 2021. This represents the highest annual growth in independent school Prep

enrolments over the past five years since 2016 (refer Table 1 above). Since 2017, independent Prep enrolments have evidenced annual increases.

As identified in Table 4 above, Prep enrolments in all Queensland schools, (State, Catholic and independent), increased by 78 students in the 2020 to 2021 period. Over the past five years, from 2016 to 2021, Prep enrolments increased by 287 students; increasing from 65,801 enrolments in 2016 to 66,088 students in 2021 (0.4% increase). During this period, Prep numbers decreased from 2016 to 2017 and from 2019 to 2020 by 1.2% and 0.3%, respectively. Reductions in Prep enrolments occurred in all three schooling sectors in the 2016 to 2017 period. Statewide Prep enrolments subsequently increased by 1.5% in the period from 2017 to 2018, with growth occurring in both the State and independent school sectors while Prep enrolments in the Catholic sector decreased.

Figure 3: Prep Enrolment Growth by Sector (%), Queensland, 2016-17 to 2020-21



In recent years, Prep enrolments in the State have remained relatively stable, with a slight increase in Prep enrolments from 2018 to 2019 (0.3% growth), followed by a 0.3% reduction in Prep enrolments from 2019 to 2020 and a 0.1% increase from 2020 to 2021 (refer Figure 3). In all these periods, independent school Prep enrolments increased by 3.3%, 2.2% and 5.1% respectively. Catholic school Prep enrolments increased from 2018 to 2019 (4.2%), but remained stable from 2019 to 2020 followed by growth from 2020 to 2021 (1.5%). State school Prep enrolments reduced in all three periods from 2018 to 2021 (-1.0%, -0.8% and -1.0%, respectively).

First Year of Secondary (Year 7)

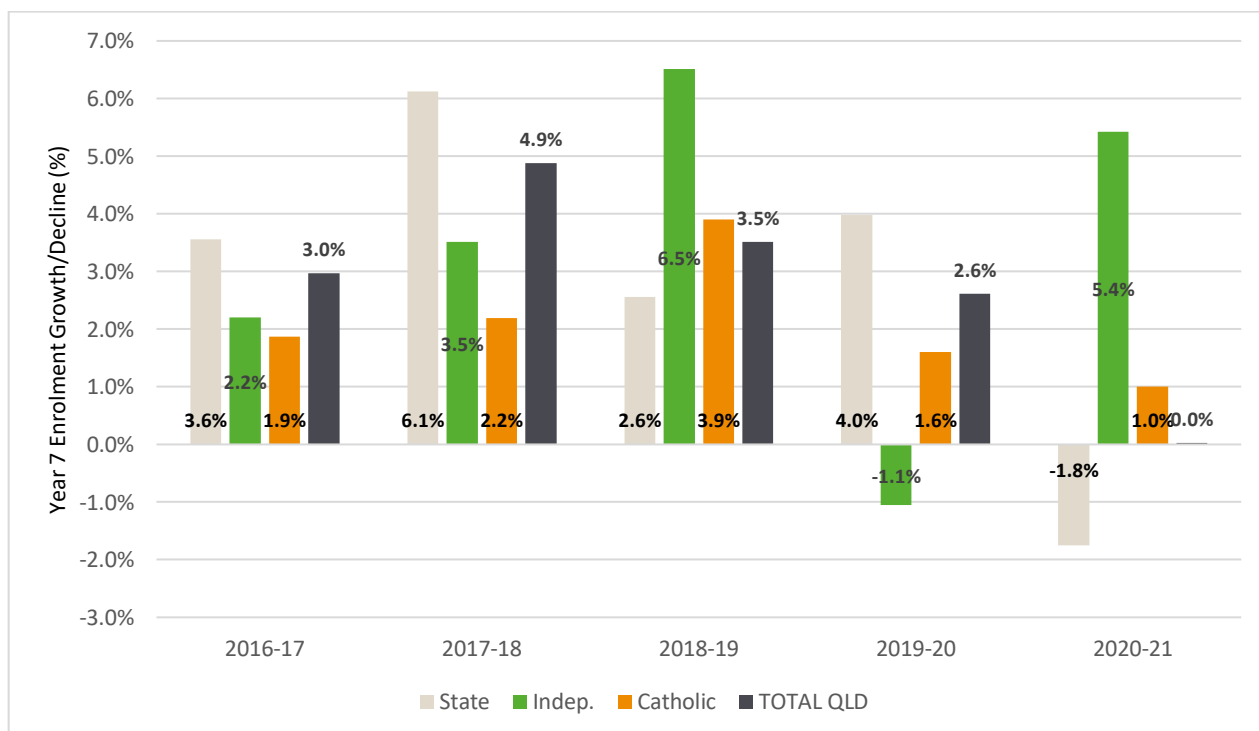
The first year of secondary is an important juncture for independent schools as schools tend to gain a large number of students from other schooling sectors. This intake into Year 7 is an important determiner of future secondary student numbers, along with the quantum of students progressing from Year 6 in the sector through to Year 7.

Year 7 enrolments at independent schools increased by 666 students from 2020 to 2021; increasing from 12,283 enrolments in 2020 to 12,949 enrolments in 2021 (refer Table 1 above). This is equivalent to a 5.4% increase in the intake into Year 7. In contrast, Year 7 enrolments at a state-wide level increased marginally by 21 students; increasing from 70,078 students in 2020 to 70,099 students in 2021 (refer Table 4 above).

Over the period from 2016 to 2021 Year 7 enrolments in independent schools increased by 1,932 students; increasing from 11,017 students in 2016 to 12,949 students in 2021 (17.5% growth) (refer Table 1 above). In regard to State-wide Year 7 enrolments, (Catholic, State and independent school enrolments), enrolments increased by 9,012 students; from 61,087 students in 2016 to 70,099 students in 2021 (14.8% growth) with growth occurring each year (refer Table 4 above).

Decline in Year 7 enrolments in the independent sector from 2019 to 2020 is the only time in recent years where Year 7 enrolments in independent schools decreased. In previous years, Year 7 enrolment growth ranged from 2.2% from 2016 to 2017 to 6.5% from 2018 to 2019, and 5.4% from 2020 to 2021 (refer Figure 4). However, it is only in the 2018-2019 and 2020-21 periods that the independent school sector's growth exceeds that of all enrolments in the State (i.e. resulting in an increase in market share).

Figure 4: Year 7 Enrolment Growth by Sector, Queensland (%), 2016-17 to 2020-21



As identified in Figure 4 above, the State sector was the only sector to experience decline from 2020 to 2021, with Year 7 enrolments increasing in both the independent and Catholic sectors where growth rates in Year 7 enrolments were higher than the state-wide growth rate. As a consequence of independent and Catholic school Year 7 enrolment growth rates being higher than rates experienced for all Queensland schools, increases in Year 7 market share would have occurred in both non-government school sectors from 2020 to 2021.

Market Share

Market share refers to the proportion of Queensland school enrolments catered by each sector.

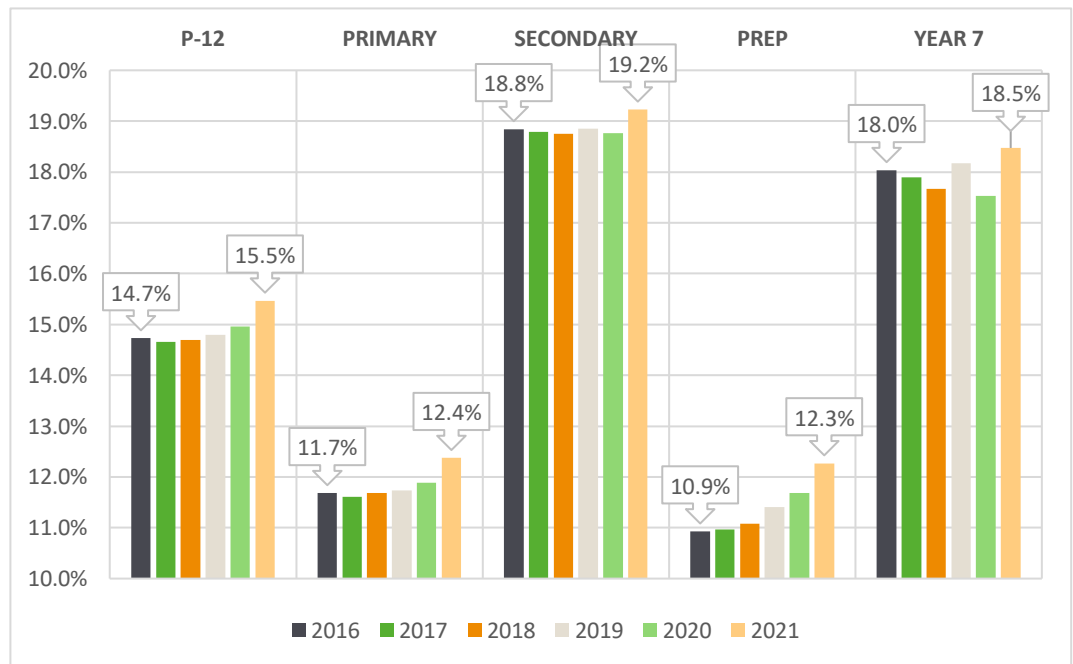
Independent Schools

In 2021, market share of total enrolments catered for by independent schools was 15.5% of all students in the State. This was the highest market share of total enrolments gained by the independent sector in the period from 2016 to 2021. From 2016 to 2018, market share was stable at 14.7%, before rising to 14.8% and 15.0% in 2019 and 2020, respectively (refer Figure 5).

Independent market share of primary enrolments was 12.4% of all primary students in the State in 2021, the highest market share in the period from 2016 to 2021. Primary market share initially decreased marginally from 2016 to 2017, before increasing.

In 2021, independent market share of secondary enrolments was 19.2%, also the highest market share in the period from 2016 to 2021. Secondary market share was relatively stable at 18.8% in the period from 2016 to 2020, apart from a slight reduction to 18.7% in 2018.

Figure 5: Independent School Market Share, 2016-2021



In regards to Prep and Year 7 enrolments, which are the most important intake years for schools, a different pattern emerges.

Independent Prep market share increased consistently from a low of 10.9% in 2016 to a high of 12.3% in 2021 (refer Figure 5).

In terms of Year 7 market share, a pattern of reductions is apparent from 18.0% in 2016 to 17.7% in 2018. Year 7 market share subsequently increased to 18.2% in 2019 before decreasing to 17.5% in 2020, the lowest level in the period from 2016 to 2021. In 2021, Year 7 market share is 18.5% the highest level in the same period.

Sector Change

Over the 2016 to 2021 period, the independent schooling sector was the only sector to experience a market share gain in total enrolments (0.74%). Both the State and Catholic sectors experienced a market share loss of 0.36% and 0.38%, respectively (refer Figure 6 below).

In the last year, from 2020 to 2021, the independent sector gained 0.51% of total enrolments while the Catholic sector gained a modest increase of 0.05% in market share. The State school sector experienced a commensurate loss of 0.56% (refer Figure 7 below).

Prep

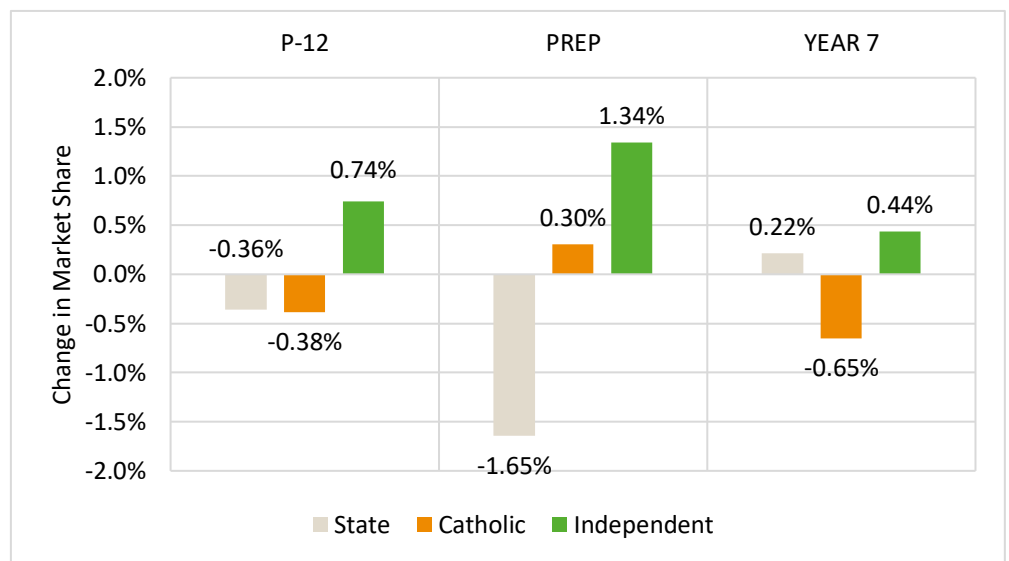
Over the past five years from 2016 to 2021, the independent schooling sector experienced a market share gain in Prep enrolments of 1.34%. Catholic schools experienced a moderate increase of 0.30% while State schools experienced a commensurate loss of 1.65% in Prep enrolments (refer Figure 6).

Similarly, in the last year, both the independent and Catholic sectors experienced market share gains, with Prep market share increasing by 0.58% and 0.24%, respectively (refer Figure 7). The State school sector lost 0.81%.

Year 7

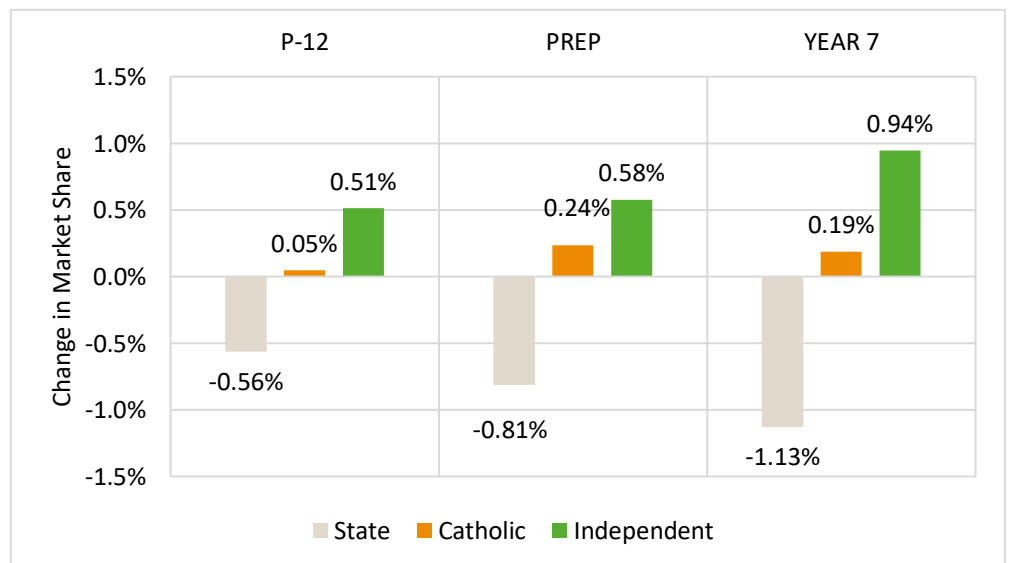
Over the past five years from 2016 to 2021, both the State and independent schooling sectors experienced market share gains in Year 7 enrolments compared to the Catholic schooling sector. The Catholic sector lost 0.65% of Year 7 enrolments to the State and independent sectors (refer Figure 6 above). The State and Independent sectors experienced commensurate gains of 0.22% and 0.44%, respectively.

Figure 6: Market Share Change by Sector, Total, Prep & FYS, 2016-2021



Note: Rounding errors may occur

Figure 7: Market Share Change by Sector, Total, Prep & Year 7, 2020-21



Note: Rounding errors may occur

In the past year, from 2020 to 2021, independent school market share of Year 7 increased by 0.94%, while Catholic school market share increased by 0.19%. The State school sector lost 1.13% (refer Figure 7).