

Overseas Student Enrolments

Key Points

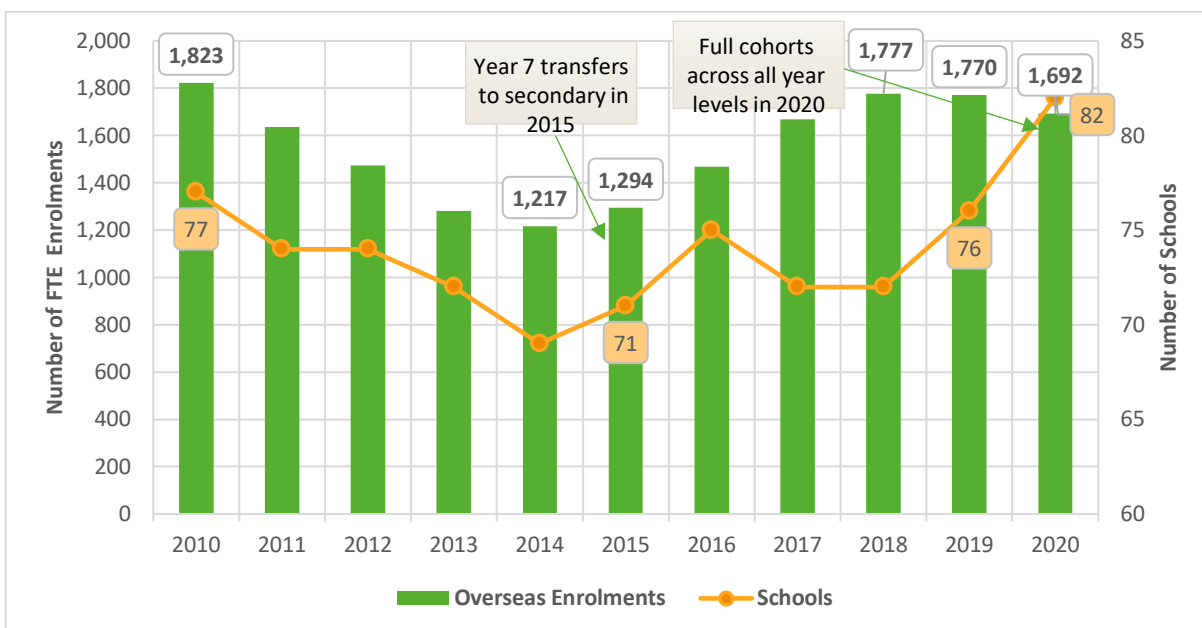
Overseas student enrolments at independent schools decreased by 78 students from 2019 to 2020; decreasing from 1,770 students in 2019 to 1,692 students (-4%). Despite the number of students declining, the number of schools catering for overseas students increased from 76 schools in 2019 to 82 schools in 2020. Catholic school enrolments decreased in this timeframe by 8%.

Significant decreases in progression rates from Year 9 to 10, and from Year 10 to 11 occurred from 2019 to 2020, with progression rates for these transitions at the lowest levels evidenced in the last decade. Similarly, the progression rate from Year 11-12 was the lowest experienced in the last decade.

Enrolments

In 2020 the independent school sector catered for 1,692 overseas students, a significant decrease from 1,770 overseas student enrolments in 2019. This decrease of 78 overseas student enrolments is equivalent to a 4.4% decrease in overseas enrolments in the last year (refer Figure 1). In the previous year, from 2018 to 2019, overseas student enrolments remained relatively stable decreasing by only 7 students.

Figure 1: Overseas Student Enrolments & Number of Schools Attended, 2010-20

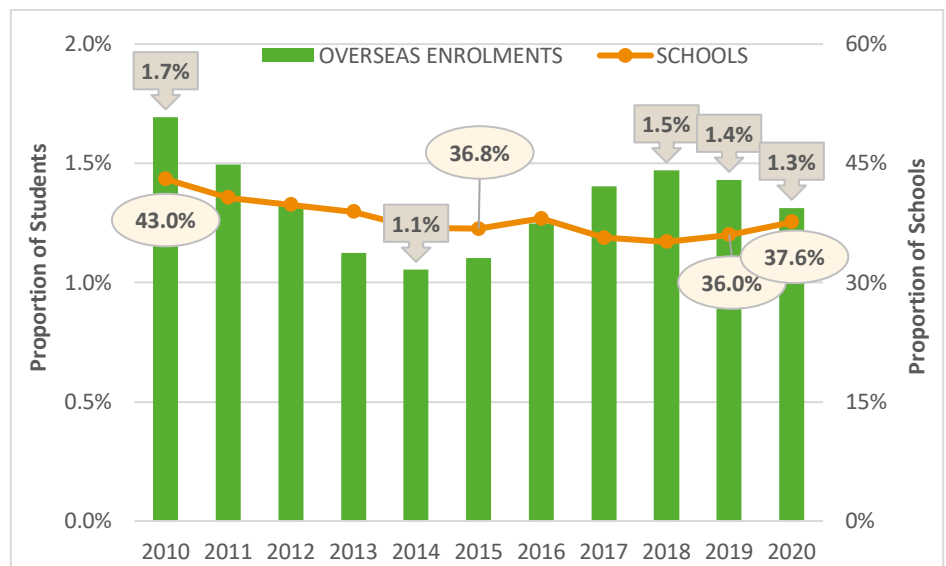


Over the last decade, from 2010 to 2020, overseas student enrolments reduced by 131 students; decreasing from 1,823 students in 2010 to 1,692 students in 2020. In the interim period however, enrolments reduced to a low of 1,217 students in 2014 before commencing an increase to a peak of 1,777 students in 2018.

Despite overseas student enrolments decreasing from 2019 to 2020, there were six more schools catering for overseas students in 2020 than in 2019 (82 schools in 2020 compared to 76 schools in 2019). This is the highest number of schools that have catered for overseas students in any years of the last decade and represents 37.6% of all independent schools in 2020. In preceding years, from 2010 to 2019, 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 2010 when 43% of all independent schools at that time catered for overseas students (refer Figure 1 above and Figure 2 below).

Figure 2: Proportion of Overseas Students of Independent School Enrolments, 2010-2020

In 2020 overseas student enrolments represented 1.3% of all FTE enrolments, the same proportion as in 2012 (refer Figure 2). The highest proportion of independent school students represented by overseas students occurred in 2010 (1.7%), while overseas students represented the lowest proportion of independent school students in the period from 2013 to 2015 (1.1% of all independent school students).



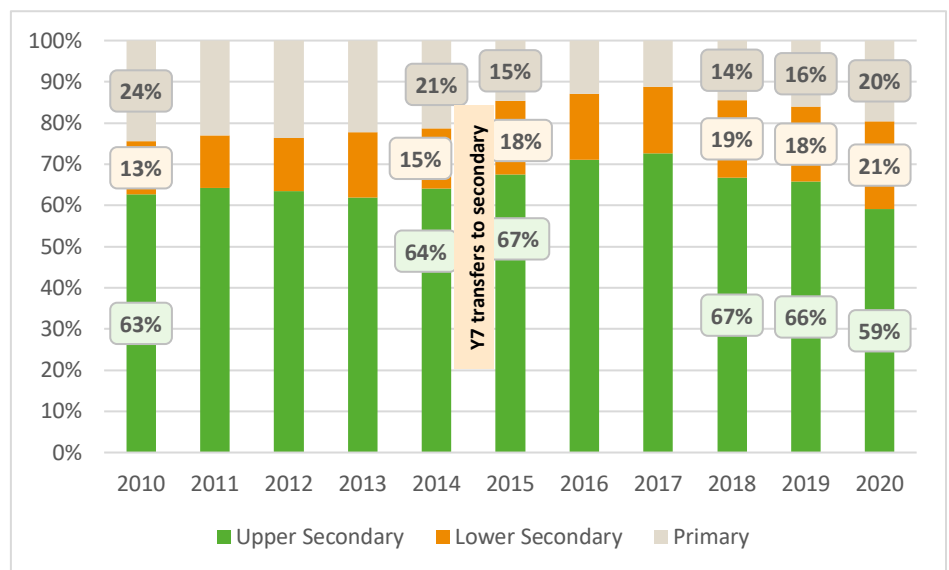
By Year Level

Distribution

Highest numbers of overseas students are enrolled in secondary year levels.

In 2010, when primary referred to Prep to Year 7 and secondary referred to Year 8 to 12, 24% of overseas students were in primary and 76% were in secondary, with 63% of students in upper secondary year levels (Years 10-12) and 13% of students in lower secondary (Years 8-9).

Figure 3: Proportion of Overseas Students, 2010-2020



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 2020, the proportion of overseas students enrolled in primary increased to 20% and the proportion in lower secondary increased to 21%, reflecting significant increases from 16% and 18% respectively in 2019. The proportion of overseas students experienced a commensurate decrease from 2019 to 2020; with 66% of overseas students enrolled in upper secondary in 2019 reducing to 59% in 2020 (refer Figures 2 and 3).

Enrolments

The number of overseas students in primary schooling has increased significantly in the 2015 to 2020 period, when primary refers to Prep to Year 6. In this timeframe primary enrolments increased from 190 students in 2015 to 331 students in 2020; a 74% increase (+141 students). With the exception of Year 2, enrolment growth occurred in all primary year levels over the 2015-2020 period (refer Table 1 below). Highest growth in primary enrolments occurred from 2017 to 2018 (+68 students), followed by the 2019 to 2020 period (+46 students) (refer Table 1 below).

Overseas student enrolments also increased in lower secondary enrolments in the 2019 to 2020 period (+41 students), as well as the overall period from 2015 to 2020 (+130 students; equivalent to a 56% increase since 2015). As was the case in primary, growth was experienced in enrolments over the 2015 to 2020 period in Year 7, Year 8 and Year 9 (refer Table 1 below). Highest growth in lower secondary enrolments occurred from 2017 to 2018 (+66 students), followed by the 2019 to 2020 period (+41 students).

Table 1: Independent School Overseas Student Enrolments by Year Level, 2010-2020

Year	Prep	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10	Y11	Y12	TOTAL	Primary	Lower Sec.	Upper Sec.
2010	43	53	39	44	48	66	77	76	101	133	281	442	420	1,823	446	515	1,143
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

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 increased from 2019 to 2020, enrolments in Years 10-12, those year levels which attract the highest number of overseas enrolments, decreased. In 2019 there were 1,165 upper secondary students. In 2020 overseas student enrolments in upper secondary years decreased by 165 students; to be in the order of 1,000 students. Decline in this period more than offset growth in primary and lower secondary year levels, resulting in net decline of 78 students in overseas student enrolments. Over the 2015 to 2020 period however overseas student enrolments did increase (+157 students; 15%).

Trends in Progression

Progression identifies the extent of movement of students into and out of individual year levels. They reflect 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 2020 to the number of students in Year 8 in 2019). 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.

Table 2 below details the level of progression in the last decade, indicating that in the last decade the number of students entering schools has ranged from a low of 158 students in 2013, with the number of Year 1-Year 12 students being 158 more than were in Prep to Year 11 in 2012, to a peak of 502 student in 2017 when there were 507 more students in Year 1-12 than were in Prep to Year 11 in 2016 (refer Table 2 below). Since this peak in 2017, the net gain of students annually has decreased, with only 275 more students in Year 1-12 in 2020 than were in Prep to Year 11 in 2019.

Table 2: Overseas Students, Apparent Progression by Grade, 2010-11 to 2019-20

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	
2010-11	-5	-8	-3	-4	5	-6	0	3	29	88	150	-43	166%	153%	90%	206
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

The highest progression of overseas students from 2019 to 2020 occurred from Year 9 to Year 10 when there were 144 more students in Year 10 in 2020 than were in Year 9 in 2019. It is of interest to note that prior to the 2016-2017 period the highest number of students occurred from Year 10-11. In 2020 however there were only 82 more overseas students in Year 11 in 2020 than were in Year 10 in 2019 (refer Table 2). Next highest in-migration occurs from Year 8 to Year 9, with 63 more overseas students in Year 9 in 2020 than were in Year 8 in 2019.

When considering the Year 9-10 and Year 10-11 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 144 students in 2020, while since 2016 the number of students entering Year 11 has reduced from 211 to 82 students in 2020.

Year 11 to Year 12 progression is the only transition where there is a net loss of overseas students are lost from schools, 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 9 fewer students in Year 12 in 2015 than were in Year 11. This corresponds to a 97% apparent

progression rates. 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.

In respect to primary year levels, relatively small numbers of overseas students enter the schooling system. It is of interest to note however that in recent years there appears to be a modest increase in the number of students gained each year, with highest gains occurring from Year 4 to Year 5 (refer Table 2). In 2020 there were 23 more Year 5 students than in Year 4 in 2019, and 25 more Year 5 students in 2019 than in Year 4 in 2018. This compares to a net gain of 13 Year 5 students from 2017 to 2018 and 5 Year 5 students from 2016 to 2017.

Size of Enrolments

Of the 82 schools catering for overseas students in 2020, two schools catered for more than 100 overseas students and a further nine schools catered for more than 50 to 100 overseas students (refer Table 3). These 11 schools catered for over half (53%) of overseas student enrolments at independent schools. A further 37% of overseas students attended 25 schools where overseas student enrolments ranged from more than 10 students to 50 students. The balance of overseas students, 10% attended 46 schools (56% of schools) where overseas student enrolments totalled 10 or fewer students.

Table 3: Size of Overseas Student Enrolments, 2020

Overseas Student Enrolment Range	Number of Schools	Percentage of Schools	Percentage of Overseas Students
>0-2	16	20%	1%
>2-5	20	24%	5%
>5-10	10	12%	4%
>10-25	14	17%	14%
>25-50	11	13%	23%
>50-100	9	11%	35%
>100	2	2%	18%
TOTAL	82	100%	100%

Table 4: Overseas Student Enrolments as a Percentage of Each Schools' Total Enrolment, 2020

Overseas Students as Percentage of Total Enrolment	Number of Schools	Percentage of Overseas Students
>0%-2.5%	59	29%
>2.5%-5%	14	29%
>5-10%	6	21%
>10%	3	21%
TOTAL	82	100%

In most schools that catered for overseas students in 2020, overseas students represented 2.5% or less of the student body (59 schools or 72% of schools that catered for overseas students). These schools catered for 29% of overseas students (refer Table 4).

A further 29% of overseas students attended 14 schools where the overseas student component represented more than 2% to 5% of the student body, while another six schools had >5-10% of total enrolments as overseas students, together accounting for 21% of overseas students. Three schools had more than 10% of the schools' total student body as overseas students, together catering for another 21% of overseas students.

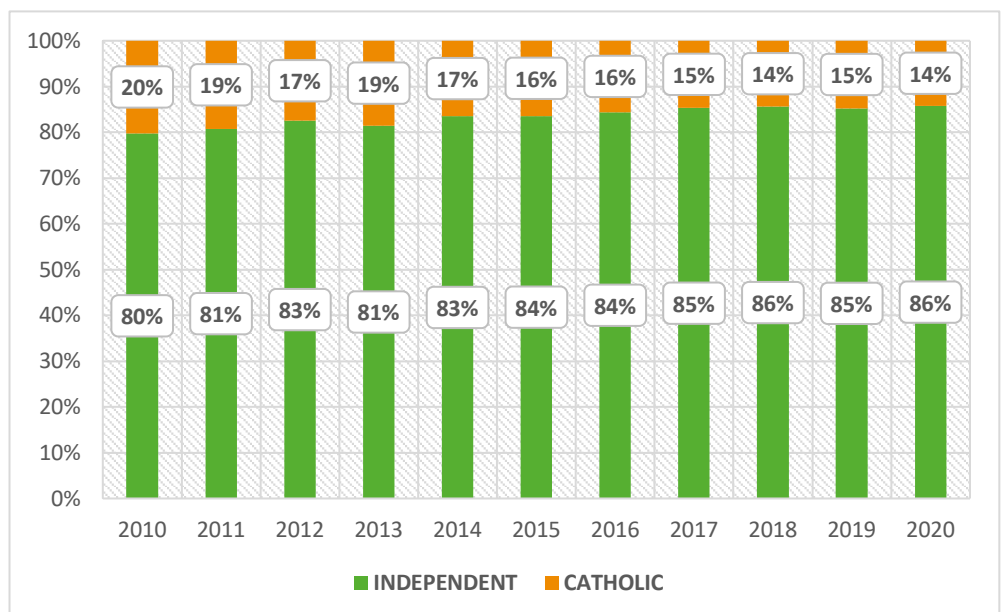
Non-Government Sector Comparison

In 2020 there were 1,972 overseas students enrolled in either independent or Catholic schools. Catholic schools catered for 14% of these students (280 students). In the past year, from 2019 to 2020, overseas students attending non-government schools reduced by 104 students; decreasing from 2,076 students to 1,972 students. This is a 5% decrease. In this period Catholic school enrolments decreased by 8% (26 students), double the rate of decline in independent school enrolments (-4%).

Over the last decade, overseas student enrolments have reduced by 14%; decreasing from 2,284 students in 2010 to 1,972 students in 2020 (-312 students). Catholic school enrolments reduced by 39%; decreasing from 461 students to 280 students (-181 students). In the same timeframe enrolments at independent schools decreased by 131 students (-7%).

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, 2010-2020



In 2010 Catholic schools catered for 20% of overseas students attending non-government schools, reducing to 14% in 2020 (refer Figure 4).

In contrast, within a context of overall decline in overseas student enrolments, independent schools have increased market share from 80% in 2010 to 86% in 2020.