

## Queensland School Enrolments

School enrolments continue to increase, with enrolments at all Queensland schools increasing 2.8% from 2019 to 2020. Enrolments at independent schools increased by 4.5%. Highest growth occurred in secondary enrolments, reflecting in large part all year levels in secondary gaining full cohorts in 2020. Secondary enrolments increased by 6.2% while primary student enrolments increased by only 0.2%.

- Prep enrolments decreased by 0.8%, or just over 500 students. Despite the decline in Prep students in 2020, independent school Prep enrolments increased by nearly 200 students.
- Enrolments into Year 7 increased by 2.3% in the past year, or nearly 1,570 students. Year 7 enrolments in independent schools however reduced by 1.2%, or just over 150 students.
- The year level structure in primary suggests a decrease of Year 7 enrolments into secondary from 2023, unless immigration from inter-State and overseas offsets lower numbers of students in primary.

In 2020 the share of school enrolments gained by independent schools has increased to the highest level ever reported, with independent schools catering for 15.2% of all school students attending Queensland schools (12.0% of primary students and 19.2% of secondary students).

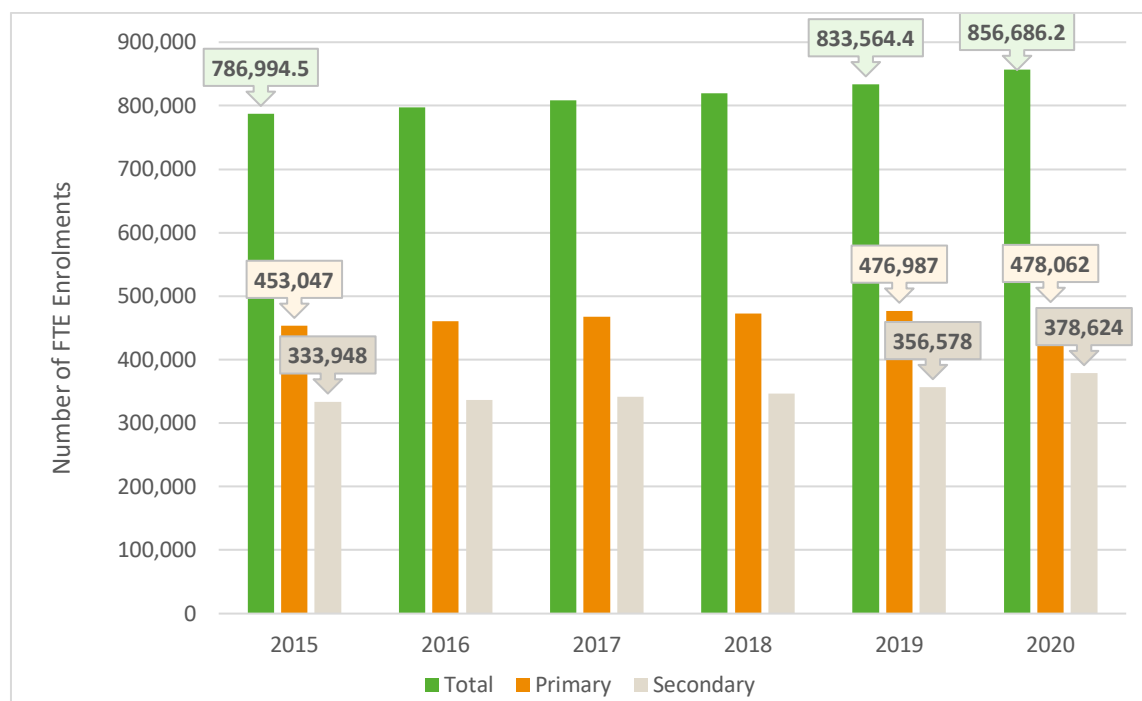
In the past year, in terms of all enrolments, the independent school sector gained 0.3 percentage points, the State sector lost market share, while the Catholic sector maintained market share.

- Independent schools gained Prep market share, but lost Year 7 market share, as did Catholic schools.

## Total Enrolments

Over the five-year-period from 2015 to 2020 full-time equivalent (FTE) student enrolments increased in Queensland by 69,691.7 students; from 786,994.5 students in 2015 to 856,686.2 students in 2020 (refer Figure 1). This reflects an 8.9% increase in the number of school students; equivalent to an average annual growth of 1.7% per annum over the five year period.

**Figure 1: Queensland Student Enrolments, 2015-2020**



Growth was not evenly distributed across primary and secondary. Primary student enrolments in Queensland schools increased by 5.5% over the 2015 - 2020 period, while secondary enrolments increased by 13.4% (+25,014.8 and +44,676.9 FTE students, respectively) (refer Figure 1 above).

### 2019 – 2020

In the most recent period, from 2019 to 2020, enrolments in the State sector increased by 23,121.8 students; from 833,564.4 students in 2019 to 856,686.2 students in 2020. This is equivalent to a 2.8% increase, the highest level of annual growth since 2007 when Prep commenced in Queensland. The significant increase from 2019 to 2020 can also be traced, in part, to 2007, when the school age of commencement changed resulting in a smaller than normal Prep cohort. This cohort was in Year 12 in 2019. This 2007 Prep cohort which left the schooling system at the end of 2019 was replaced by a full cohort of Year 12 students in 2020, with 2020 being the first time that all year levels from Prep to Year 12 had full cohorts.

It is not surprising therefore that secondary student enrolments increased at a significantly higher rate than primary enrolments from 2019 to 2020, 0.2% compared to 6.2%, respectively. This reflects the number of secondary students increasing by nearly 22,050 students, compared to growth of 1,075 primary students.

### Migration & Apparent Progression Rates

Queensland school enrolment patterns are characterised by in-migration of students annually, reflecting students who have moved into schools from either inter-State locations or from overseas. In 2020 there were 5,838.7 more children enrolled in Year 1 to Year 10 than were enrolled in Prep to Year 9 in 2019 (which became the Year 1 to Year 10 cohort in 2020) (refer Table 1). All year levels from Year 1 to Year 10 experienced a gain in students, with the highest level of in-migration occurring into the Year 5 cohort in 2020, with 804 more children in Year 5 in 2020 than were in Year 4 in 2019.

**Table 1: Queensland School Migration & Apparent Progression Rates, 2015-2020**

Period	Change (number)										Apparent Progression		
	P-Y1	Y1-2	Y2-3	Y3-4	Y4-5	Y5-6	Y6-7	Y7-8	Y8-9	Y9-10	TOTAL Y1-10	Y10-11	Y11-12
2015-16	168	335	524	533	674	449	445	455	376	815	<b>4,774.2</b>	97%	91%
2016-17	285	591	620	801	905	714	594	583	166	1,250	<b>6,508.2</b>	97%	91%
2017-18	679	630	785	744	758	584	521	514	185	652	<b>6,052.9</b>	97%	91%
2018-19	528	835	1,021	950	977	926	1,006	669	333	936	<b>8,181.6</b>	94%	91%
2019-20	456	696	710	705	804	790	788	421	211	256	<b>5,838.7</b>	93%	89%

Given the Covid-19 pandemic it would have been expected that migration of school-aged children into Queensland from 2019 to 2020 would have reduced, with migration from overseas significantly reduced, and possibly a reticence of families with school-aged children to re-locate from other States. However, while a decline in in-migration has occurred from the previous period from 2018 to 2019 when just over 8,180 additional children entered Year 1 to Year 10 in Queensland schools, the level of in-migration is not the lowest experienced in recent years. In 2016, just over 4,770 more school children were enrolled in Year 1 to Year 10 in Queensland schools than were in Prep to Year 9 in 2015.

Apparent progression from Year 10 to Year 11 and from Year 11 to Year 12 in the 2019 to 2020 period however was the lowest in recent years. In 2020 the Year 11 cohort represented 93% of the previous Year 10 cohort in 2019, a reduction from 94% in the 2018 to 2019 period, which was lower than the 97% apparent progression rate evidenced in the previous three year periods (refer Table 1). Similarly, apparent progression from Year 11 to Year 12 reduced from 91% in the previous four-year-periods to 89% in 2020.

### Prep

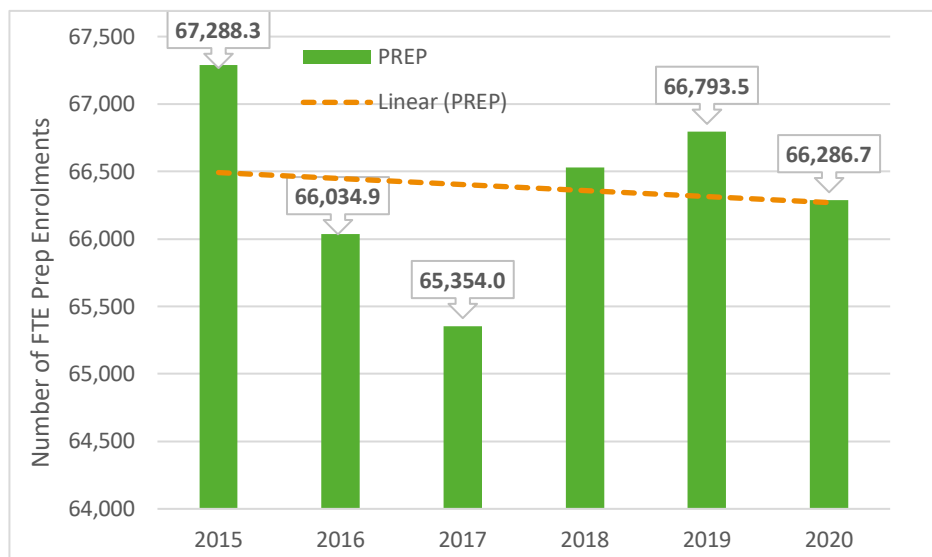
Prep enrolments over time provide an indication of the number of students entering the schooling system. The pattern evidenced by Prep enrolments in the State in recent years is not suggestive of growth.

Over the past five-year-period, from 2015 to 2020, Prep enrolments in the State have decreased from 67,288.3 students in 2015 to 66,286.7 students in 2020; a decrease of 1,001.6 FTE enrolments (equivalent to decline of 0.3% per annum) (refer Figure 2).

In the interim period however decline was greater, with Prep enrolments reducing to a low of 65,354 students in 2017 before increasing through to 2019 before again decreasing.

In the past year, from 2019 to 2020, Prep enrolments decreased in the State by 507 students; decreasing from 66,793.5 students in 2019 to 66,286.7 students in 2020 (0.8% decline) (refer Figure 2).

**Figure 2: Queensland Student Enrolments, Prep Enrolments 2015-2020**



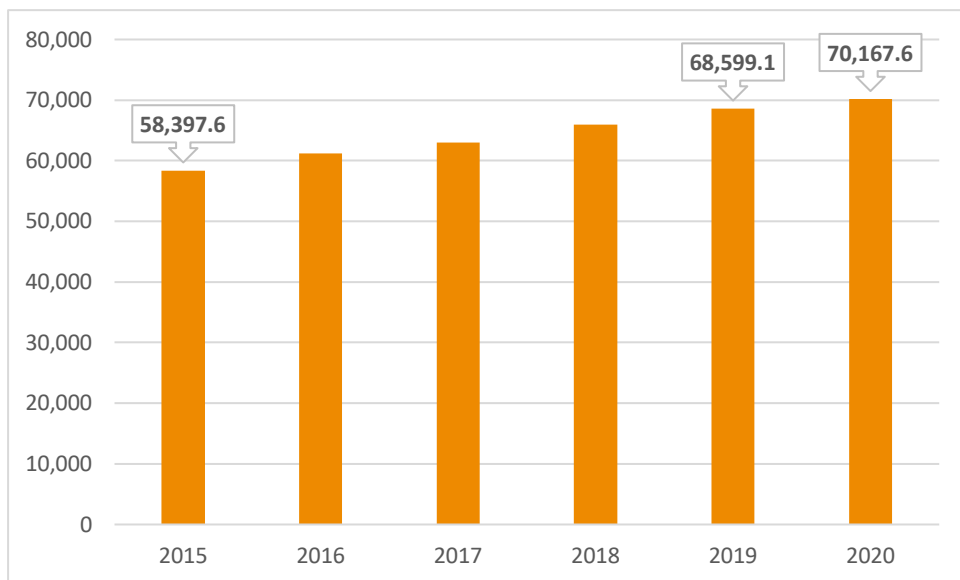
## Year 7

Year 7 intakes are the most important determiner of secondary enrolments.

In the period from 2015 to 2019, that period since Year 7 has been the first year of secondary, Year 7 enrolments increased from 58,397.6 students in 2015 to 71,167.6 students in 2020; an increase of 11,770 students (equivalent to 3.7% per annum). Consistent growth has occurred during this period (refer Figure 3).

In the most recent period, from 2019 to 2020, Year 7 enrolments increased by 1,569 students or 2.3% (refer Figure 9). This was the lowest growth rate in recent years, with rates of at least 3% occurring since 2015 to 2016.

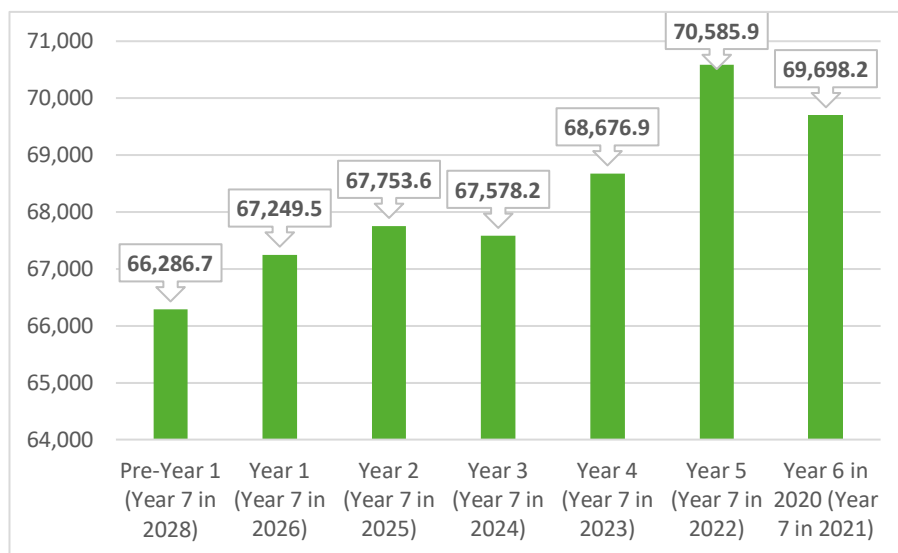
**Figure 3: Queensland Year 7 Enrolments 2015-2020**



The year level structure evidenced in Queensland in 2020 would suggest the number of Year 7 enrolments in 2022 would be higher than the 2021 intake, with the Year 5 cohort in 2020 being larger than the Year 6 cohort in 2020 (refer Figure 4).

The highest intake into Year 7 would be expected to occur in 2022, when the Year 5 cohort in 2020 would enter Year 7. There would then be expected to be a significant decline in the Year 7 intake in 2023, when a significantly smaller number of Year 4 students in 2020 would be expected to enter Year 7.

**Figure 4: Queensland Student Enrolments, Year Levels, 2020**



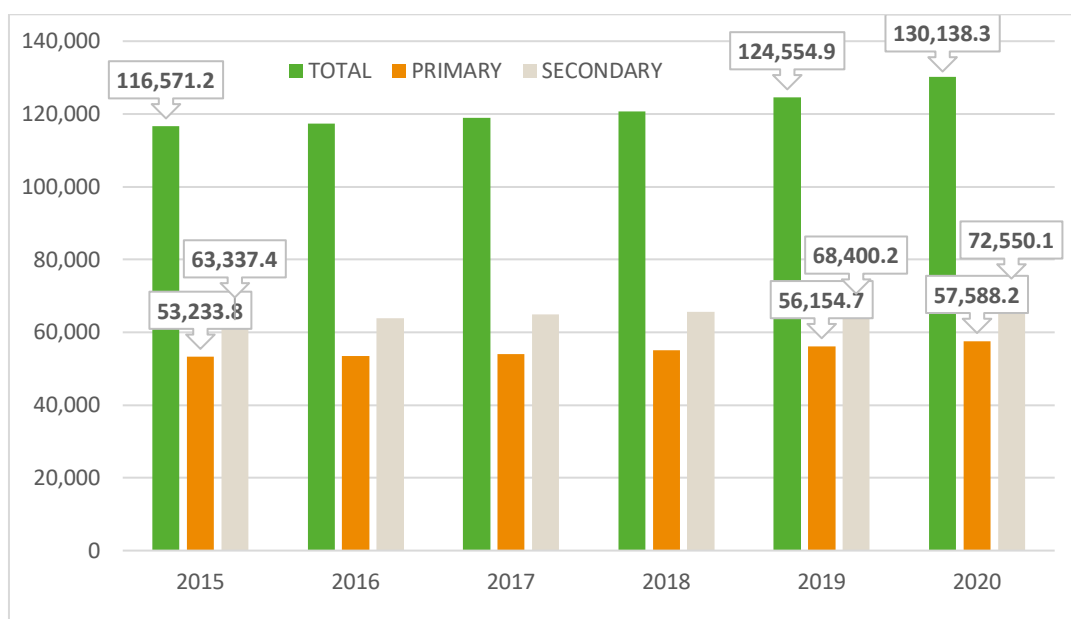
In the longer term, relatively, consistent decline would be expected, reflecting reducing numbers of students in the Prep to Year 3 cohorts in 2020 entering Year 7.

However, as Queensland normally gains students from interstate and overseas annually, refer *Migration & Apparent Progression Rates* section above, over time enrolments in each of these year levels are likely to be supplemented by in-migration of school-aged children into the State. Should this occur the pattern of reductions in the longer term may be offset. However, in the short term, if in-migration was to occur at similar levels as evidenced from 2019 to 2020, in-migration is unlikely to be sufficient to offset decline in Year 7 intakes suggested by the 2020 year level structure in 2023 and 2024.

### Independent School Enrolments

Over the period from 2015 to 2020 full-time equivalent (FTE) student enrolments increased in Queensland independent schools by 13,567.1 students; from 116,571.2 students in 2015 to 130,138.3 students in 2020 (refer Figure 5). This reflects an 11.6% increase in the number of school students; equivalent to an average annual growth of 2.2% per annum over the five year period. This reflects a higher rate of increase than evidenced when all school enrolments in the State of Queensland are considered (1.7% per annum over the five-year-period).

**Figure 5: Queensland Independent School Enrolments, 2015-2020**



Growth was not evenly distributed across primary and secondary. Primary student enrolments in Queensland independent schools increased by 8.2% over the 2015 - 2020 period, while secondary enrolments increased by 14.5% (+4,354.4 and +9,212.7 FTE students, respectively) (refer Figure 1 and Table 2 below). These rates are higher than the growth rates of 5.5% for primary and 13.4% for secondary for all school enrolments in Queensland.

#### 2019 – 2020

In the most recent period, from 2019 to 2020, enrolments in the Queensland independent schools increased by 5,583.4 students; from 124,554.9 students in 2019 to 130,138.3 students in 2020. This is equivalent to a 4.5% increase, and is significantly higher than the growth rate of 2.8% experienced across all schools in Queensland. The significant increase from 2019 to 2020 can also be traced, in part, to 2007, when the school age of commencement changed resulting in a smaller than normal Prep cohort in 2007. This cohort was enrolled in Year 12 in 2019 and left the schooling system at the end of 2019 to be replaced by a full cohort of Year 12 students in 2020, with 2020 being the first time that all year levels from Prep to Year 12 had full cohorts.

It is not surprising therefore that secondary student enrolments increased at significantly higher rate than primary enrolments from 2019 to 2020, 2.6% compared to 6.1%, respectively. This reflects the number of secondary students increasing by 4,149.9 students, compared to growth of 1,433.5 primary students. The growth rate in primary was significantly higher than the growth rate experienced across all schooling sectors in Queensland (0.2%), while the

growth rate for secondary was slightly below the growth rate experienced across all schooling sectors in Queensland (6.1% compared to 6.2%, respectively).

**Table 2: Queensland Independent School Enrolments, 2015-2020**

	Prep	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10	Y11	Y12	Ungr	TOTAL
<b>2015</b>	7,501	7,322	7,280	7,488	7,668	7,779	8,091	10,470	8,492	10,877	11,302	11,427	10,735	140	<b>116,571</b>
<b>2016</b>	7,142	7,303	7,387	7,397	7,899	8,124	8,198	11,027	10,505	8,604	11,114	11,815	10,764	137	<b>117,416</b>
<b>2017</b>	7,054	7,084	7,392	7,586	7,789	8,448	8,470	11,274	11,225	10,773	8,881	11,651	11,094	222	<b>118,942</b>
<b>2018</b>	7,295	7,124	7,269	7,767	8,028	8,380	8,994	11,654	11,521	11,445	11,158	9,154	10,709	249	<b>120,746</b>
<b>2019</b>	7,577	7,362	7,351	7,741	8,217	8,690	8,989	12,550	11,987	11,825	12,095	11,199	8,675	297	<b>124,555</b>
<b>2020</b>	7,776	7,711	7,598	7,819	8,216	8,964	9,272	12,398	12,793	12,205	12,431	12,322	10,313	322	<b>130,138</b>

Note: FTE Enrolments are rounded

## Migration & Apparent Progression Rates

Queensland independent school enrolment patterns are characterised by in-migration of students, with students moving into independent schools from other schooling sectors within the State, inter-State locations and from overseas (refer Table 1 below).

In 2020 there were more children in each year level than the preceding year level in 2019. The only exception was in the progression from Year 11 in 2019 to Year 12 in 2020, when the Year 12 cohort reflected 92% of the Year 11 cohort in 2019 (886 fewer students enrolled in Year 12 than were enrolled in Year 11 in 2019 (which became the Year 12 cohort in 2020) (refer Table 1). The highest level of in-migration from 2019 to 2020 occurred into the Year 7 cohort in 2020, with 3,408 more children in Year 7 in 2020 than were in Year 6 in 2019. This change from 2019 to 2020 reflects an apparent progression rate of 138%, i.e. the Year 7 cohort was 138% higher than the Year 6 cohort in 2019. This rate is slightly lower than the Year 6 to Year 7 progression rate from 2018 to 2019 (140%), but similar to the rate evidenced from 2016-2017 and from 2017 to 2018. Next highest in-migration tends to occur from Year 4 to Year 5, with there being 747 more children enrolled in Year 5 in 2020 than were in Year 4 in 2019, followed by Year 9 to Year 10 with 606 more students in Year 10 than were in Year 9 in 2019.

**Table 3: Queensland School Migration & Apparent Progression Rates, 2015-2020**

Period	Change (number)										Apparent Progression		
	P-Y1	Y1-2	Y2-3	Y3-4	Y4-5	Y5-6	Y6-7	Y7-8	Y8-9	Y9-10	Y6-7	Y10-11	Y11-12
<b>2015-16</b>	-198	65	117	411	456	419	2,936	35	112	237	136%	105%	94%
<b>2016-17</b>	-58	88	199	392	549	346	3,076	198	269	277	138%	105%	94%
<b>2017-18</b>	70	185	376	442	591	546	3,184	247	220	385	138%	103%	92%
<b>2018-19</b>	67	227	472	450	662	609	3,556	333	304	650	140%	100%	95%
<b>2019-20</b>	134	236	468	475	747	582	3,409	243	218	606	138%	102%	92%

The lowest level of in-migration from 2019 to 2020 occurred in the transition from Prep to Year 1, with 134 more students in Year 1 in 2020 than were in Prep in 2019. This transition from Prep to Year 1 has consistently had the lowest level of in-migration each year and has been the only year level transition where there has been in the past a loss of students from the sector. This occurred from 2015 to 2016 and from 2016 to 2017 (refer Table 1).

Given the COVID-19 pandemic it would have been expected that migration of school-aged children into Queensland from 2019 to 2020 would have reduced, with migration from overseas significantly reduced, and possibly a reticence of families with school-aged children to re-locate from other States. However, in-migration and progression rates do not suggest significant alterations in patterns from 2019 to 2020, compared to previous years.

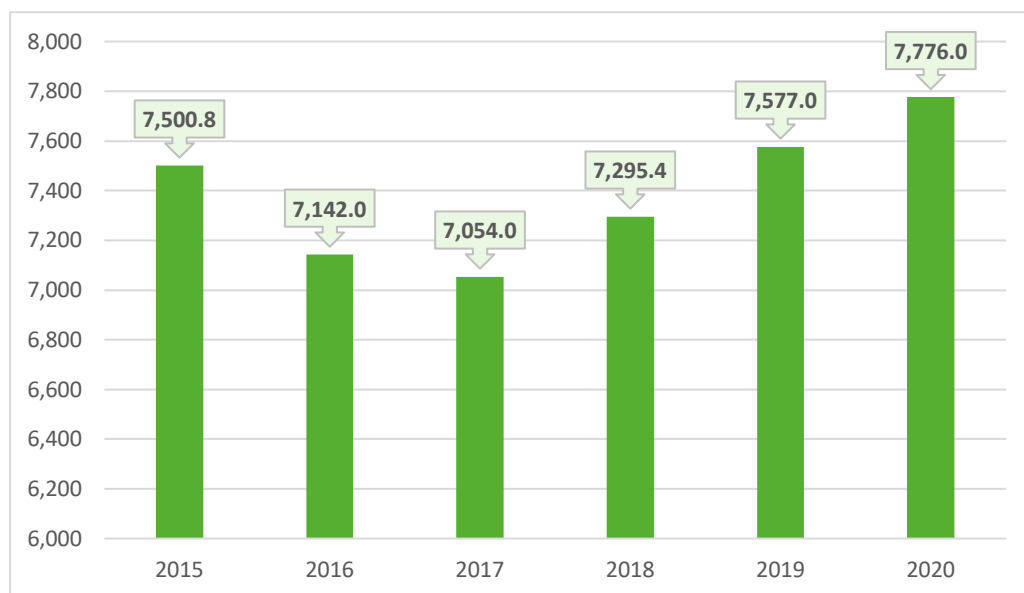
### Prep

Prep enrolments over time provide an indication of the number of students entering the schooling system.

Over the past five-year-period, from 2015 to 2020, Prep enrolments in independent schools have increased from 7,501 students in 2015 to 7,776 students in 2020; an increase of 1,001.6 FTE enrolments (equivalent to decline of 0.3% per annum) (refer Figure 6).

In the interim period, however, Prep enrolments reduced from 7,500.8 students in 2015 to a low of 7,054 students in 2017. Since 2017 Prep enrolments increasing through to 2020.

**Figure 6: Queensland Independent Student Enrolments, Prep Enrolments 2015-2020**



In the last year, from 2019 to 2020 Prep enrolments increased by 199 students. In contrast, Prep enrolments across all schools in the State decreased by 507 students.



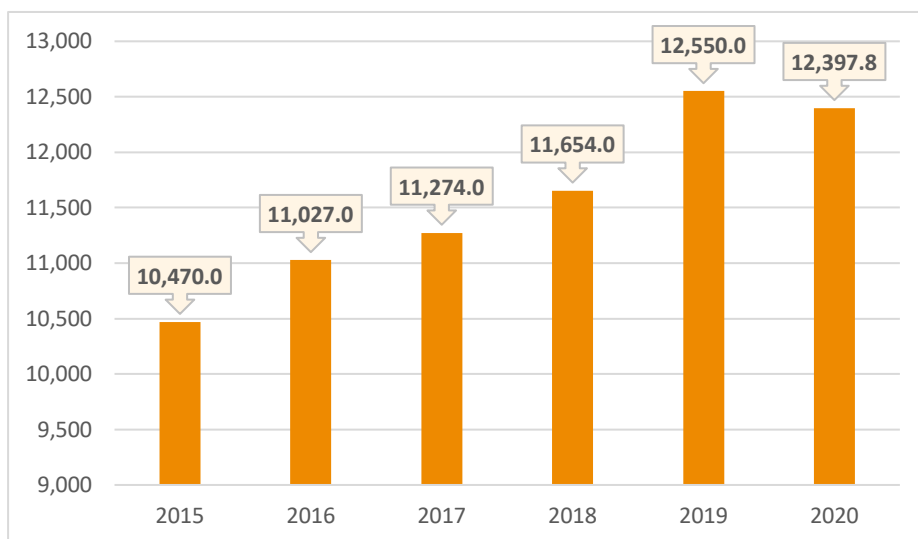
### Year 7

Year 7 intakes are the most important determinant of secondary enrolments.

In the period from 2015 to 2020 that period since Year 7 has been the first year of secondary, Year 7 enrolments increased consistently from 10,470 students in 2015 to 12,550 students in 2019, before reducing to 12,397.8 students in 2020 (refer Figure 7).

Decline from 2019 to 2020 reflected a 1.2% reduction in Year 7 enrolments. This contrasts with Year 7 enrolment change from 2019 to 2020 across all schools in the State, where Year 7 enrolments increased by 2.3%.

**Figure 7: Queensland Independent Schools Year 7 Enrolments 2015-2020**



### Market Share Change

#### Total Enrolments

In 2020 the highest market share level recorded for independent schools in Queensland was achieved, with 15.2% of school students attending independent schools. This was a 0.4 percentage point gain from 2015 when 14.8% of students attended independent schools and follows a period of market share stability in the 2016 to 2018 period (refer Table 4 and Figure 9).

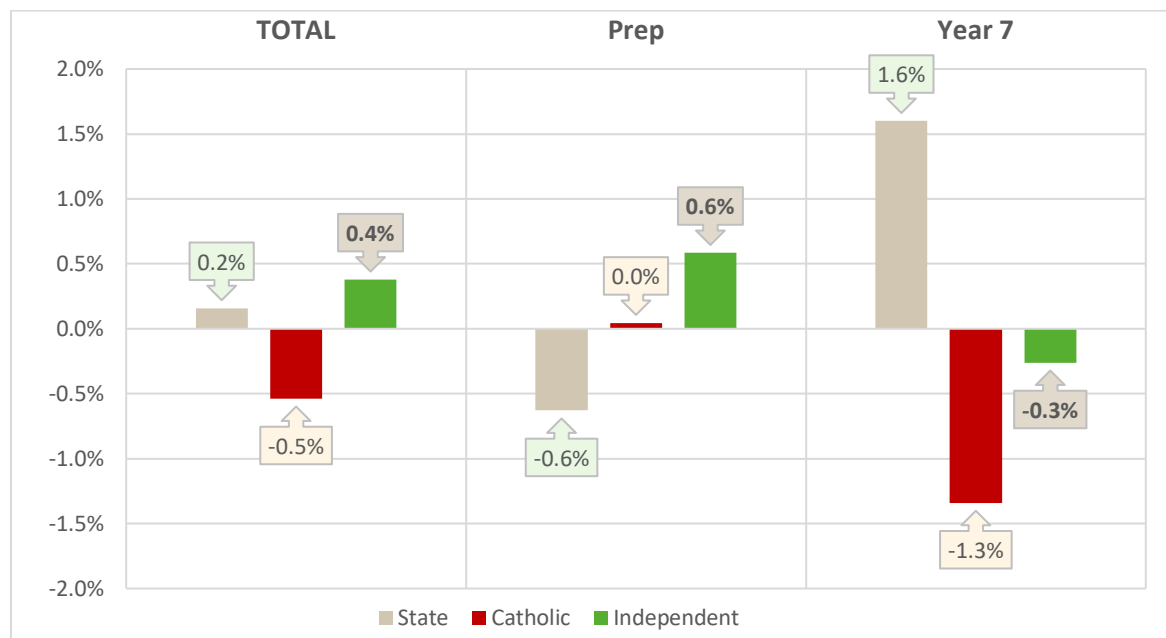
Over the same five-year-period the proportion of students attending Catholic schools reduced from 18.5% to 17.9%; a 0.5 percentage point loss in market share (refer Table 4 and Figure 10).

**Table 4: Market Share – All Students**

	State	Catholic	Independent
<b>2015</b>	66.7%	18.5%	14.8%
<b>2016</b>	67.0%	18.3%	14.7%
<b>2017</b>	67.2%	18.1%	14.7%
<b>2018</b>	67.3%	18.0%	14.7%
<b>2019</b>	67.2%	17.9%	14.9%
<b>2020</b>	66.9%	17.9%	15.2%
<b>2015-20 Change</b>	<b>0.2%</b>	<b>-0.5%</b>	<b>0.4%</b>

State school market share increased by 0.2 percentage points from 2015 to 2020; decreasing from 66.7% in 2015 to 66.9% in 2020. However, in the interim period market share increased to 67.3% in 2018, before reducing through to 2020.

**Figure 8: Market Share Change -Total, Prep and Year 7 Student Enrolments, 2015-20**



In the last year, from 2019 to 2020, independent school market share increased significantly, increasing by 0.3 percentage points – the highest gain by the sector in the past five years (refer Table 4). The State sector lost market share (-0.3 percentage points), while the Catholic sector maintained market share.

### Prep

In 2015 in the order of 11.1% of Prep students attended independent schools. In 2020 this proportion had increased to 11.7%; a 0.6 percentage point gain. Consistent growth in market share has occurred since 2017. The 2020 market share is the highest market share achieved by independent schools since Prep commenced (refer Table 5 and Figure 10 above).

In the same period the proportion of students attending Catholic schools remained stable, albeit market share reduced to a low of 16.7% in 2018, before returning to 17.4% in 2020.

Conversely, State school market share decreased from 71.5% in 2015 to 70.8% in 2020 (0.6 percentage points). Market share loss follows a period of market share gains made by the State sector from 2015 to 2018.

In the most recent period, from 2019 to 2020, Prep enrolments in the entire State decreased by 507 students. Within this context of decline, both independent and Catholic schools gained Prep market share (0.4 and 0.1 percentage point gains, respectively) (refer Table 5 above). State schools experienced a commensurate loss in Prep market share (0.5 percentage points).

**Table 5: Market Share – Prep Students**

	State	Catholic	Independent
<b>2015</b>	71.5%	17.4%	<b>11.1%</b>
<b>2016</b>	72.0%	17.1%	<b>10.8%</b>
<b>2017</b>	72.0%	17.2%	<b>10.8%</b>
<b>2018</b>	72.3%	16.7%	<b>11.0%</b>
<b>2019</b>	71.3%	17.3%	<b>11.3%</b>
<b>2020</b>	70.8%	17.4%	<b>11.7%</b>
<b>2015-20 Change</b>	<b>-0.6%</b>	<b>0.0%</b>	<b>0.6%</b>

### First Year of Secondary

Independent school share of students in Year 7 have fluctuated since Year 7 has become the first year of secondary. Within this context of fluctuations, market share decreased by 0.3 percentage points over the 2015 to 2020 period. In 2015 independent schools catered for 17.9% of Year 7 students, while in 2020 this proportion was 17.7% the same market share as in 2018. Highest market share in this period occurred in 2019, when 18.3% of Year 7 students attended independent schools (refer Table 6 and Figure 10 above).

**Table 6: Market Share –Year 7 Students**

	State	Catholic	Independent
<b>2015</b>	61.7%	20.4%	<b>17.9%</b>
<b>2016</b>	62.1%	19.9%	<b>18.0%</b>
<b>2017</b>	62.4%	19.7%	<b>17.9%</b>
<b>2018</b>	63.1%	19.3%	<b>17.7%</b>
<b>2019</b>	62.5%	19.2%	<b>18.3%</b>
<b>2020</b>	63.3%	19.1%	<b>17.7%</b>
<b>2015-20 Change</b>	<b>1.6%</b>	<b>-1.3%</b>	<b>-0.3%</b>

Over the five-year-period the proportion of students in the first year of secondary attending Catholic schools also reduced, by 1.3 percentage points; from 20.4% in 2015 to 19. % in 2020. Market share has decreased consistently over this period. In contrast, State school market share has increased from 61.7% in 2015 to 63.3% in 2020, with market share gains experienced in most years.

In the most recent period, from 2019 to 2020, both independent and Catholic schools lost Year 7 market share (0.6 and 0.1 percentage points, respectively). State school market share increased by 0.8 percentage points.