

Independent School Enrolments

Enrolments Overview

Enrolments at independent schools in Queensland continued to increase in 2020, with the February Non-State School Census indicating full-time equivalent (FTE) enrolments in the sector reached 128,809.9 at 218 independent schools (refer Figure 1).

A significant proportion of growth in the 2019 to 2020 period, approximately one-third, reflects full cohorts being gained in all year-levels in Queensland in 2020. In the 2007 to 2019 period one year-level each year had a smaller cohort associated with a change in the school starting age in 2007.

From 2019 to 2020 FTE enrolments in independent schools increased by 5,163.1 FTE enrolments; increasing from 123,646.8 in 2019 to 128,809.9 enrolments in 2020 (refer Table 1 below). This equates to a 4.2% growth rate, nearly double the growth rate experienced from 2018 to 2019 when enrolments increased by 2.4% (refer Figure 2). Since 2010, when FTE enrolments were in the order of 107,691 FTE, enrolments in the sector have increased by 21,119 FTE enrolments or nearly 20% over the ten-year period.

Figure 1: Independent School Enrolments & Number of Schools, 2010-2020

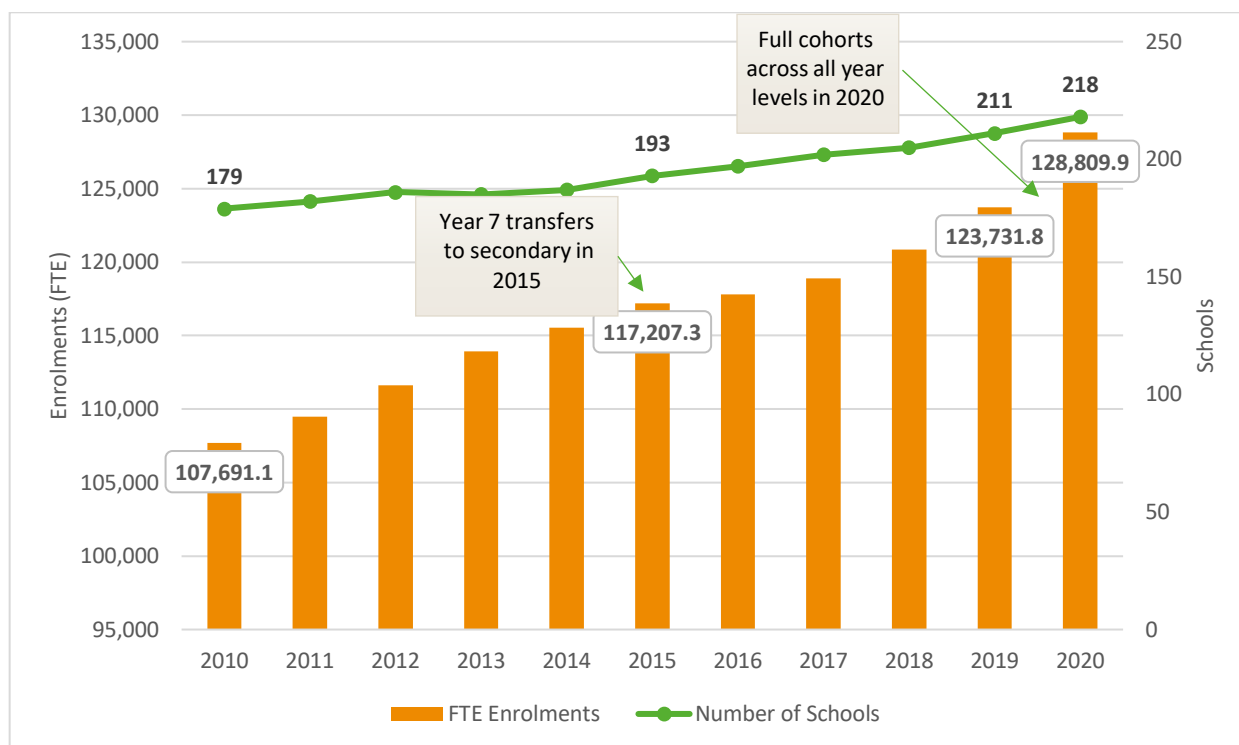


Table 1: Independent School Enrolments, 2010-20

Year	Prep	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10	Y11	Y12	Ung.	TOTAL
2010	6,349	6,496	6,075	5,227	6,642	6,929	7,274	8,212	10,941	10,659	10,647	10,741	10,104	1,395.5	107,691
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

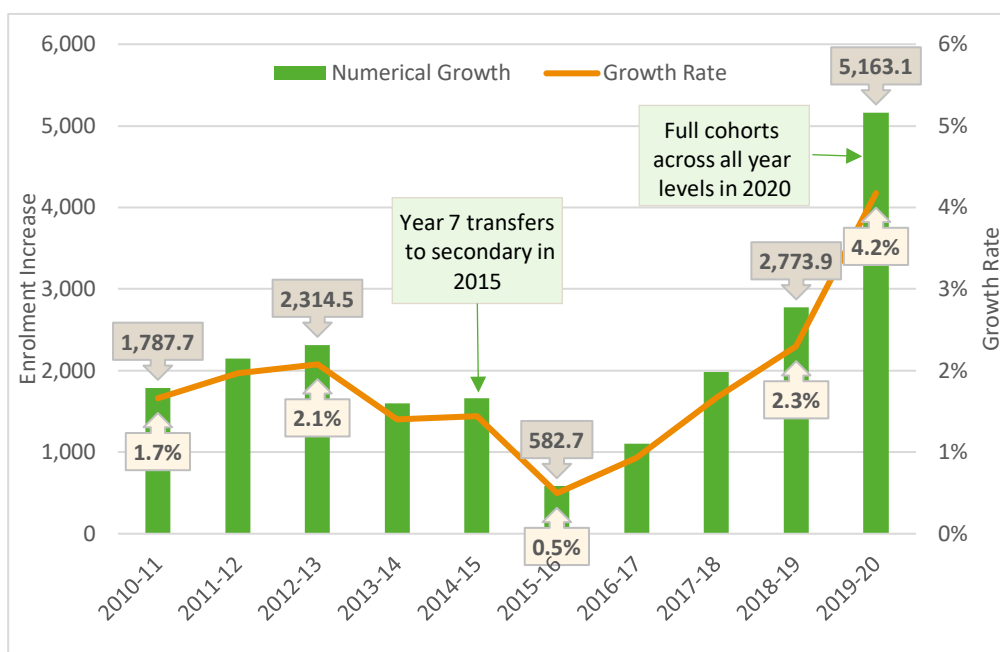
Notes: FTE enrolments have been rounded.

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

Both numerical growth and average growth from 2019 to 2020 are at the highest level experienced by the independent school sector in the last decade, from 2010 to 2020 (refer Figure 2).

Lowest levels of growth in the past ten years occurred from 2015 to 2016, when enrolments increased by only 582.7 or 0.5%. Since this time, enrolment growth has been consistent, with the second highest levels of numerical and annual growth occurring from 2018 to 2019.

Figure 2: Independent School Numerical Growth & Enrolment Growth Rates, 2010-2020



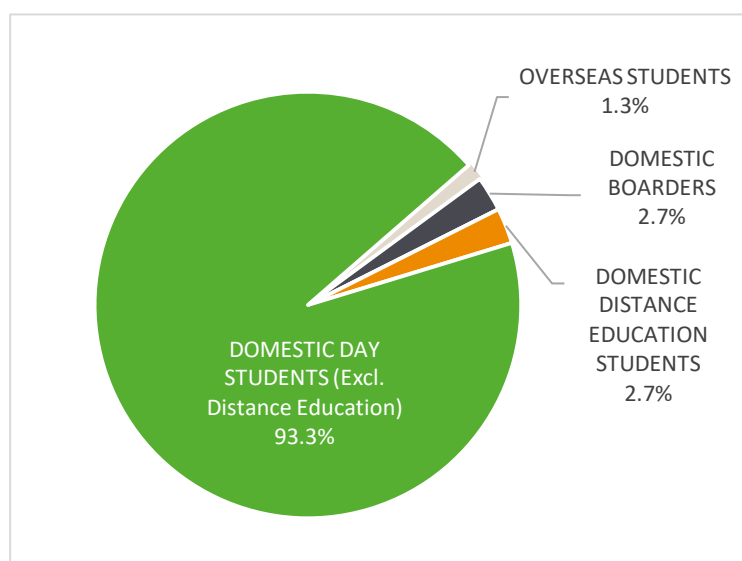
It should be noted that the significant growth in enrolments from 2019 to 2020, in part, reflects full cohorts being gained across all year levels in 2020. In previous years, one year-level each year was a partial cohort, reflecting the change to school commencement age in conjunction with the introduction of Prep in 2007. As indicated in Table 1 above, the number of Year 12 students in 2020 increased by 1,650 students from 2019 (32% of net growth from 2019 to 2020), reflecting Year 12 gaining a full cohort in 2020. If only enrolments from Prep to Year 11 are considered, with all these year levels being full cohorts in both 2019 and 2020, the rate of growth in the sector from 2019 to 2020 was 3.1% (+3,513.5 FTE enrolments). This is still the highest level of growth experienced in the sector over the past decade.

Enrolments by Attendance Type

Most of the students attending independent schools are domestic students who attend school daily. These students account for 93.3% of independent school enrolments. Both domestic boarding students and domestic distance education students each account for a further 2.7% of independent school enrolments. The balance of 1.3% of student enrolments are overseas students (refer Figure 3).

Different patterns of growth, and decline, occurred for various components that comprise independent school students in the last year.

Figure 3: Independent School Enrolments by Attendance Type, 2020



Domestic distance education student FTE enrolments increased by 188.2, or 5.7%, from 2019 to 2020 (refer Table 1). During the same period, students enrolled as domestic boarding students increased by 33, or 1.0%, while domestic student FTE enrolments, excluding distance education students, increased by approximately 5,019.9 students from 2019 to 2020. This reflects a 4.4% increase. In contrast, overseas student enrolments decreased in the same period (-78 FTE enrolments; equivalent to 4.4% decline).

Table 2: Independent School Enrolments by Attendance Type, Distribution of Growth 2019-20

ATTENDANCE TYPE	FTE ENROLMENTS		CHANGE 2019-2020	
	2019	2020	Numerical	Percentage
OVERSEAS STUDENTS	1,770.0	1,692.0	-78.0	-4.4%
DOMESTIC BOARDERS	3,391.0	3,424.0	33.0	1.0%
DOMESTIC DISTANCE EDUCATION STUDENTS	3,303.0	3,491.2	188.2	5.7%
DOMESTIC DAY STUDENTS (Excl. Distance Education)	115,182.8	120,202.7	5,019.9	4.4%
TOTAL	123,646.8	128,809.9	5,163.1	4.2%

Enrolments by Student Types

Different patterns of growth occurred in the past year for the four types of students for which data is collected at independent schools (refer Table 3). These four categories of students are: Indigenous, English as a Second Language (ESL), Students with Disability (SWD) and Special Assistance School (SAS) students. These categories are not mutually exclusive, with a student potentially being included in all categories.

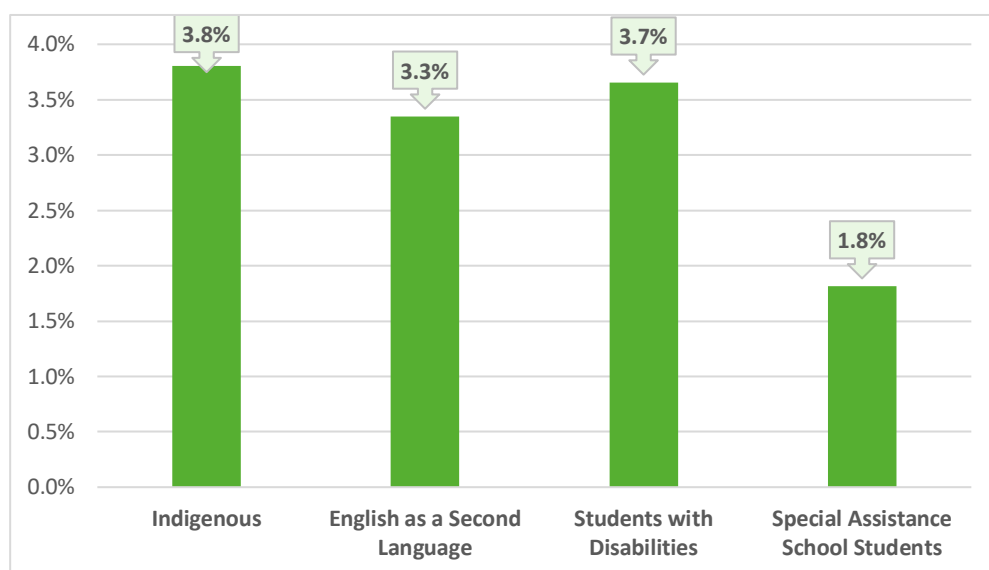
In the past year from 2019 to 2020 highest percentage growth was of students who attend Special Assistance Schools, with FTE enrolments increasing by 23.4%, increasing from 1,893 to 2,335.5 FTE enrolments (+442.4 enrolments) (refer Table 3). Highest numerical growth in enrolments was experienced by SWDs, with SWD enrolments increasing by 526.2 FTE enrolments; from 4,180.2 to 4,706.4 FTE enrolments (12.6% growth). Growth in Indigenous enrolments increased by 11.3% or 496.5 FTE enrolments. Lowest growth occurred in ESL enrolments, which increased by only 2.3% (+96.6 FTE enrolments).

Table 3: Independent School Enrolments by Student Type, Growth 2019-20

STUDENT TYPE	FTE ENROLMENTS		CHANGE 2019-2020	
	2019	2020	Numerical	Percentage
Indigenous	4,400.5	4,897.0	496.5	11.3%
English as a Second Language	4,213.0	4,309.6	96.6	2.3%
Students with Disabilities	4,180.2	4,706.4	526.2	12.6%
Special Assistance School Students	1,893.0	2,335.4	442.4	23.4%

The highest proportion of independent school students across the four student type categories are Indigenous students, representing 3.8% of all student enrolments in 2020 (refer Figure 4). Students with disabilities represent nearly the same proportion of enrolments (3.7%), while ESL students represent 3.3% of independent school students. Those students who attend Special Assistance Schools account for 1.8% of independent school students.

Figure 4: Proportion of Independent School Enrolments by Student Type, 2020



Independent school enrolments increased by just over 5,160, or 4.2%, from 2019 to 2020. This is the highest annual increase in recent years and, in part, reflects full cohorts being gained across all year levels in 2020 following the change of school commencement age in 2007.

- Prep enrolments at independent schools increased by 163 students from 2019 to 2020 (2.2%). In contrast Prep enrolments in all schools in Queensland decreased by slightly from 2019 to 2020 (-0.3%).
- Independent school enrolments in the first year of secondary decreased by 1.1% from 2019 to 2020. This compares to Year 7 enrolments in all Queensland schools increasing by 2.6%.

Independent school market share of Prep enrolments has increased each year since 2016, while a pattern of market share decline in Year 7 is presented since 2017.

Over the past five years, from 2015 to 2020, primary enrolments increased at a much lower rate than secondary enrolments. The lower growth rate in primary is suggestive of a slowing of growth in secondary enrolments in the future.

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 second consecutive year there has been in-migration into each primary year-level, with movement of Prep students into independent schools, with 53 more Year 1 students in 2020 than had been in Prep in 2019 (which became the Year 1 cohort in 2020) and 42 more Year 1 students in 2019 than had been in Prep in 2018. In the periods from 2015 to 2018 period net losses of Prep students occurred (refer Table 4 below).

The level of net in-migration of students into Year 1 to Year 6 also evidences an increase over time, with 2,177 more students in Year 1 to Year 6 in 2020 than were in Prep to Year 5 in 2019 (who became the Year 1 to Year 6 cohort in 2020). From 2018-19 and from 2017-18 an additional 2,082 and 2,139 students, respectively entered Years 1 to 6. This compares to only 986 more students in Year 1 to Year 6 in 2016 than were in Prep to Year 5 in 2015, and 1,483 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 2019 to 2020 was into Year 5, with 687 more Year 5 students in 2020 than Year 4 students in 2019. 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 2015 to 2020. 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 4: Independent School Enrolments Apparent Retention & Progression Rates, 2015-2020

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
2015-16	-205	28	32	376	434	321	2,921	81	26	157	105%	96%	986	264
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

Notes: FTE enrolments have been rounded.

Secondary

At the secondary level, independent schools gained students into all year levels from 2018 to 2019, with the exception of Year 12, with Year 12 in 2020 representing 93% of the Year 11 cohort in 2019. This proportion is the lowest progression rates from Year 11 to Year 12 in recent years (refer Table 4 above). Similarly, Year 10-11 progression from 2019 to 2020 was at equal lowest level in recent years, being the same as in the 2018 to 2019 period.

In lower secondary year levels in-migration has increased over time, as was the case in regarding to primary. In 2020 there were 1,076 more students in Year 8 to Year 10 in 2020 than were in Year 7 to Year 9 in 2019 (who became the Year 8 to Year 10 cohort in 2020). From 2018-19 and from 2017-18 an additional 759 and 738 students, respectively entered Years 8 to 10. This compares to only 264 more students in Year 8 to Year 10 in 2016 than were in Year 7 to Year 9 in 2015, and 461 more students in Year 8 to Year 10 in 2017 than were in Year 7 to Year 9 in 2016.

The highest level of in-migration from 2019 to 2020 was into Year 10, with 542 more Year 10 students in 2020 than Year 9 students in 2019. 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 2020 the number of Year 7 students entering independent schools from other schooling sectors, or from schools outside the State, overseas or home-schooling, was 3,367 more than the number of students in independent schools in Year 6 in 2019. This was the second largest number of students that have entered the first year of secondary at independent schools in recent years, representing 5.6% of students that were attending other schooling sectors in Queensland in Year 6 in 2019 (refer Table 5 below). This proportion of Year 6 students attending other schooling sectors gained by the independent school sector into Year 7 is the same proportion as that evidenced annually in the 2015-2016 to 2017-2018 period. Only in the 2018 to 2019 period was this proportion higher.

Table 5: Proportion of Year 7 Students Gained from Other Sectors, 2015-2020

Migration into Year 7		Year Y7/Y6 Students in Preceding Year in Other Sectors		Year Proportion of Y7/Y6 Students Gained from Other Sectors	
2015-16	2,921	2015	52,524	2016	5.6%
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%

Note: FTE enrolments have been rounded

Based on Year 6 enrolments in 2020 at Catholic and State schools (60,710 students), and the independent sector gaining 5.6% of these students into Year 7 in 2021, the independent sector will gain an estimated 3,379 Year 7 students from outside the sector in 2021. As there were 9,138 Year 6 students attending independent schools in 2020, which are assumed to progress to Year 7 at independent schools, the addition of 3,379 Year 7 students from other sectors would

result in a Year 7 enrolment in the order of 12,517 students in 2021. This compares to 12,283 Year 7 students enrolled in independent schools in 2020.

Queensland Context

Patterns of enrolment growth and decline in independent school however 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

2020 there were nearly 861,336 FTE enrolments in schools in Queensland, comprised of 477,281 primary school enrolments and 384,056 secondary enrolments (refer Table 6). Enrolments increased by 25,742 enrolments from 2019 to 2020; increasing from 835,596 students in 2019. Nearly half of this growth was associated with the full cohorts being achieved in 2020, with the number of Year 12 students increasing by 11,689 enrolments between 2019 and 2020.

Table 6: Queensland FTE Enrolments, 2015-2020

Year	Prep	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10	Y11	Y12	Ungr.	TOTAL
2015	67,024	66,058	66,244	65,444	63,943	61,990	60,621	58,339	41,929	59,828	62,303	60,503	55,232	176	789,632
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

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 2015 to 2020, primary enrolments increased at a much lower rate than secondary enrolments (6% increase in primary enrolments compared to 14% increase in secondary enrolments), while Prep enrolments have actually decreased by 1.5% over the same period. The lower growth rate in primary is suggestive of a slowing of growth in secondary enrolments in the future, as current primary students progress into secondary.

Prep Enrolments

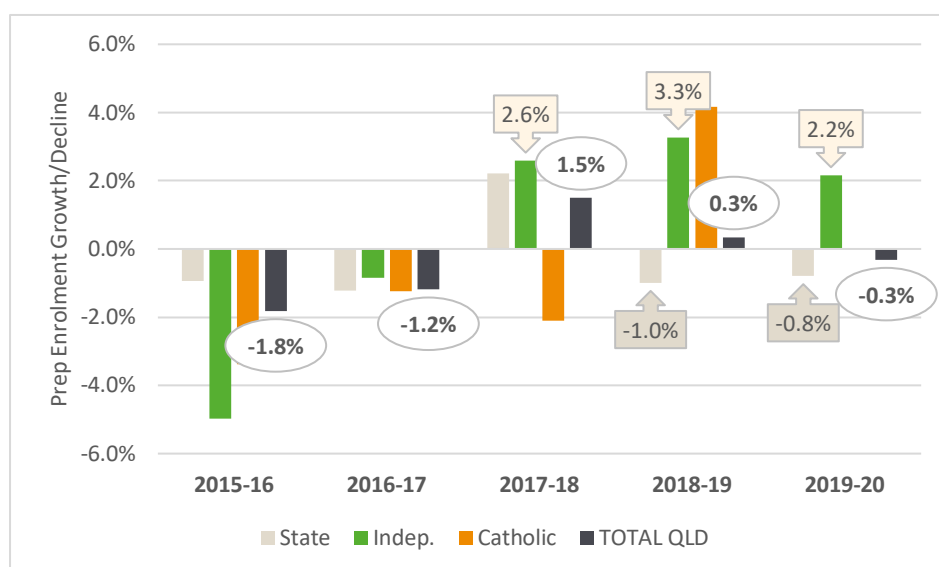
Trends in Prep intakes are a significant indicator of future enrolments trends, reflecting the numbers of children entering the schooling system.

Prep enrolments at independent schools increased by 163 students from 2019 to 2020 (2.2%); increasing from 7,553 enrolments in 2019 to 7,716 enrolments in 2020. However, over the past five years from 2015 Prep enrolments

increased by only 150 students reflecting reductions in Prep numbers during the interim period from 2015 to 2017 (refer Table 1 above). Since 2017 Prep enrolments have consistently increased.

As identified in Table 6 above, Prep enrolments in all Queensland schools, (State, Catholic and independent), reduced by 212 students in the 2019 to 2020 period. Over the last five years, from 2015 to 2020, Prep enrolments increased by 1,014 students; reducing from 67,024 enrolments in 2015 to 66,010 students in 2020 (1.5% reduction). In the interim period Prep numbers decreased in the periods from 2015 to 2016 and from 2016 to 2017 by 1.8% and 1.2%, respectively. Reductions in Prep enrolments occurred in all three schooling sectors during these periods. State-wide 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 5: Prep Enrolment Growth by Sector (%), Queensland, 2015-16 to 2019-20



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 (refer Figure 5). In both these periods independent school Prep enrolments increased, by 3.3% and 2.2%, respectively. Catholic school Prep enrolments also increased from 2018 to 2019, but remained stable from 2019 to 2020, while State school Prep enrolments reduced from 2018 to 2019, and from 2019 to 2020 (-1.0% and -0.8%, respectively).

First Year of Secondary (Year 7)

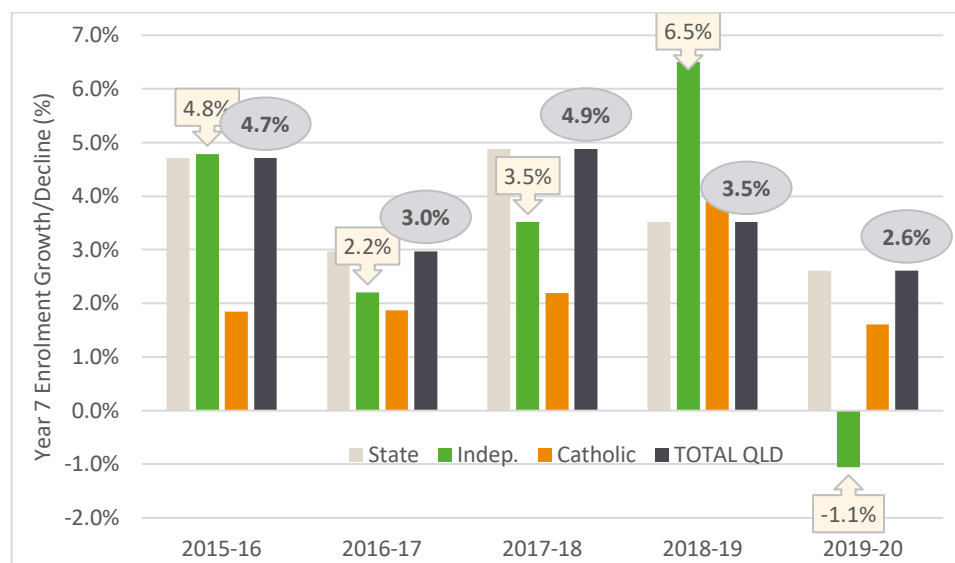
The first year of secondary is an important juncture for independent schools as schools tend to gain a large number of students from other schooling sectors. This intake into Year 7 is an important determiner of future secondary student numbers, along with the quantum of students progressing from Year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

Year 7 enrolments at independent schools decreased by 131 students from 2019 to 2020; decreasing from 12,414 enrolments in 2019 to 12,283 enrolments in 2020 (refer Table 1 above). This is equivalent to a 1.1% decrease in the intake into Year 7. In contrast, Year 7 enrolments at a State-wide level increased from 1,783 students; increasing from 68,295 students in 2019 to 70,078 students in 2019 (refer Table 6 above). This equivalent to a 2.6% growth rate.

Over the period from 2015 to 2020 Year 7 enrolments in independent schools increased by 1,769 students; increasing from 10,514 students in 2015 to 12,283 students in 2020 (18.8% growth) (refer Table 1 above). In regard to State-wide Year 7 enrolments, (Catholic, State and independent school enrolments), enrolments increased by 11,739 students; from 58,339 students in 2015 to 70,078 students in 2020 (20.1% 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 first 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 (refer Figure 6 below). However, it is only in the 2015-16 and 2018-2019 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 6: Year 7 Enrolment Growth by Sector, Queensland (%), 2015-16 to 2019-20



As identified in Figure 6 above, the independent sector was the only sector to experience decline from 2019 to 2020, with Year 7 enrolments increasing in both the State sector and Catholic sector, albeit the growth rate in Catholic Year 7 enrolments was lower than the State-wide growth rate. As a consequence of independent and Catholic school Year 7 enrolment growth rates being lower than rates experienced for all Queensland schools, decreases in Year 7 market share would have occurred in both non-government school sectors from 2019 to 2020.

Market Share

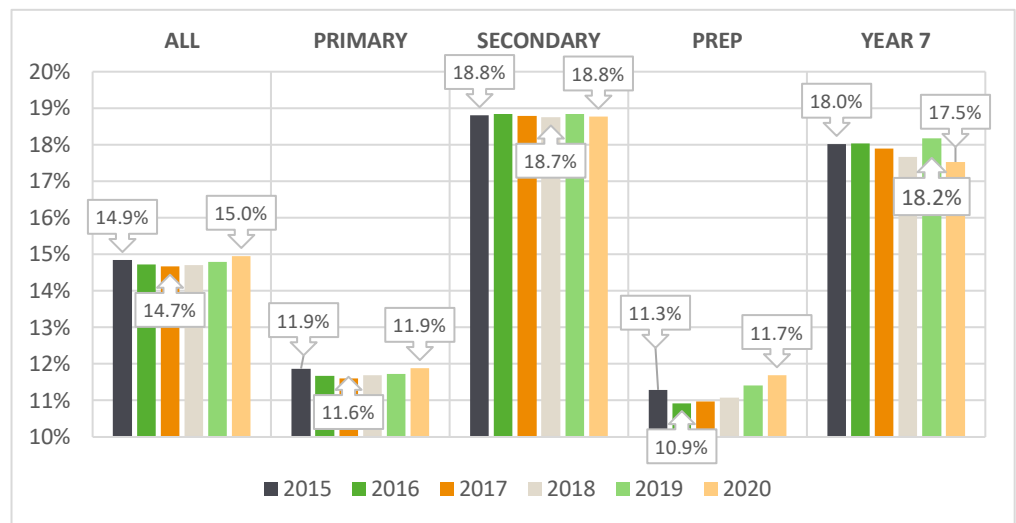
Market share refers to the proportion of Queensland school enrolments catered by each sector.

Independent Schools

In 2020 market share of all primary and all secondary students catered for by independent schools was in accord with market share levels gained in 2015 (11.9% and 18.8%, respectively) (refer Figure 7 below). When all enrolments are considered however independent school market share increased by 0.1 percentage points since 2015; from 14.9% to 15.0% of all FTE enrolments in the State. In the case of both total enrolments and primary, independent school market

share initially decreased from 2015 to 2017, before increasing. Secondary student market share remained relatively stable, being in the order of 18.8% in all years, except for 2018 when market share reduced to 18.7%.

Figure 7: Independent School Market Share, 2015-2020



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

Prep market share initially reduced from 2015 to 2016; from 11.3% to 10.9%. Market share subsequently increased each year, reaching a peak of 11.7% in 2020 (refer Figure 7).

In terms of Year 7 market share, a pattern of reductions in market share is apparent. In both 2015 and 2016 market share was stable at 18.0%. With the exception of 2019 when market share reached a peak of 18.2%, market share reduced consistently from 2016 to be in the order of 17.5% in 2020.

Sector Change

Over the 2015 to 2020 period the Catholic schooling sector was the only sector to experience market share loss (-0.63 percentage points). The State sector experienced a gain of 0.52 percentage points, while independent school market share increased by 0.11 percentage points (refer Figure 6 below).

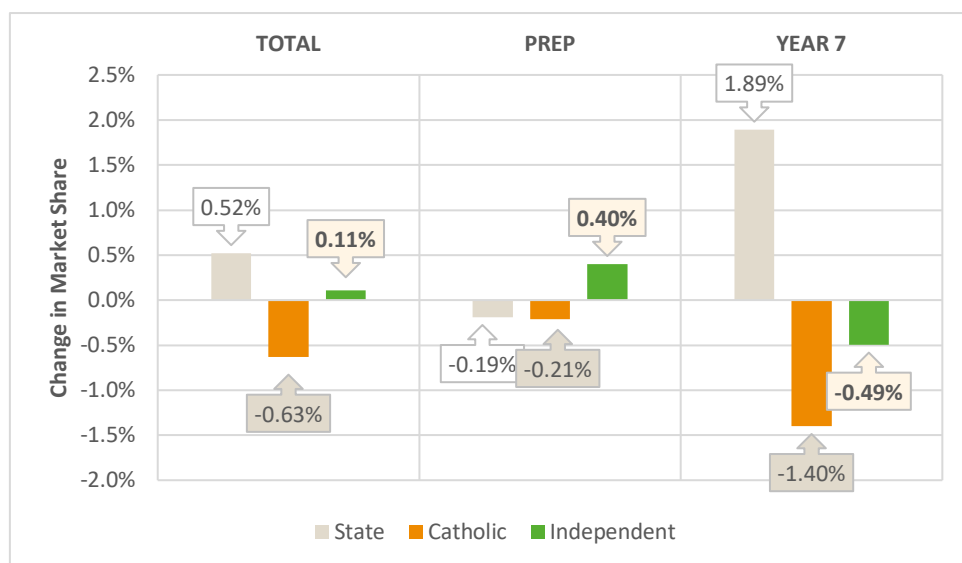
In the past year, from 2019 to 2020, the independent sector gained 0.16% of total enrolments while the Catholic sector gained a modest increase of 0.06 percentage points in market share. The State school sector experienced a commensurate loss (-0.22 percentage points) (refer Figure 8 below).

Prep

Over the past five years from 2019 to 2020, the independent schooling sector experienced market share gains in Prep enrolments of 0.40 percentage points, compared to Catholic and State schools both experiencing losses of 0.21 and 0.19 percentage points, respectively (refer Figure 8).

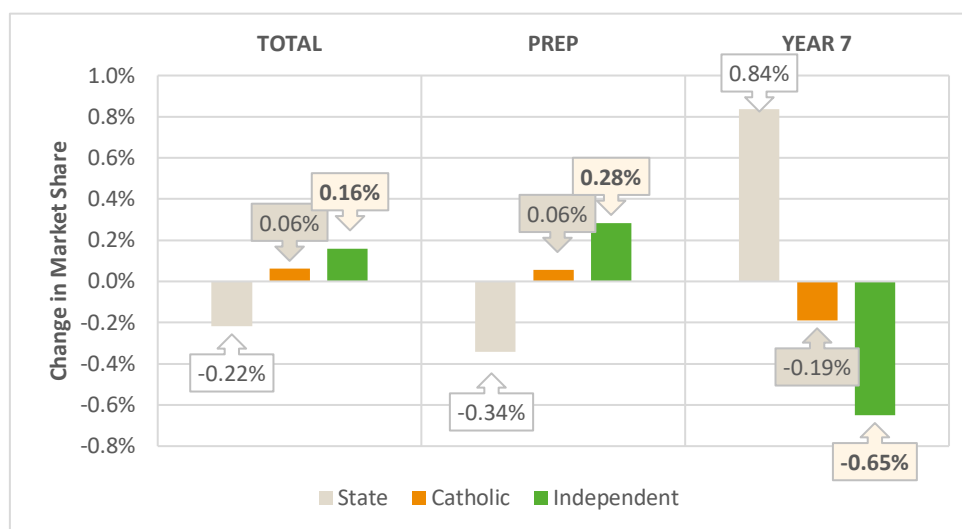
In the past year, only the State school sector experienced market share loss, with Prep market share decreasing by 0.34% (refer Figure 9 below). The independent and State school sectors gained 0.28 and 0.06 percentage points, respectively.

Figure 8: Market Share Change by Sector, Total, Prep & FYS, 2015-2020



Note: Rounding errors may occur

Figure 9: Market Share Change by Sector, Total, Prep & Year 7, 2019-2020



Note: Rounding errors may occur

In the past year, from 2019 to 2020, independent school market share of Year 7 decreased by 0.65%, while Catholic school market share decreased by only 0.19%. The State school sector gained 0.84 percentage points (refer Figure 9).