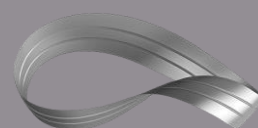

SCHOOL ENROLMENT
TRENDS AND
PROJECTIONS
ISA RESEARCH
REPORT

2022 EDITION



INDEPENDENT
SCHOOLS
AUSTRALIA

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RESEARCH PURPOSE

1

Independent Schools Australia (ISA) regularly undertakes in-depth analysis of school enrolment trends and projections. Combining the most up to date Australia Bureau of Statistics (ABS) enrolment figures with other data sources allows us to present historical, current and future student enrolment trends across the three school sectors (Independent, Catholic and government) at a national and state or territory level.

This analysis focuses on:

- An overview of current student enrolment figures (2021 data).
- Historical analysis of enrolments (enrolment figures, growth, share)
- Projections of future enrolments to 2031.

ANALYSIS NOTES

2

2.1 DATA SOURCES

This report primarily utilises publicly available sources of data. All historical and current enrolment data is taken from the ABS Schools Australia publication and Department of Education, Skills and Employment (DESE) Non-Government Schools Census (unpublished). The enrolment projections use the ABS Population Projections dataset in addition to these two data sources.

ABS Schools Australia

The ABS Schools Australia data provides enrolment figures by state and territory including by primary and secondary and staff. This report uses FTE (full time equivalent) figures for enrolments.

<https://www.abs.gov.au/statistics/people/education/schools/latest-release>, Table 43a

ABS Population Projections

The Australian Bureau of Statistics (ABS) produces a series of population projections every five years following the Census of Population and Housing. The current series of projections cover the entire Australian population for the period 2018 to 2066 for each Australian state and territory.

These ABS projections contain assumptions concerning fertility, life expectancy, net overseas migration (NOM) and for the state and territories, interstate migration.

<https://www.abs.gov.au/statistics/people/population/population-projections-australia/latest-release>, Data extracted via ABS.Stat

Department of Education, Skills and Employment (DESE) Non-Government Schools Census

Unpublished data detailing Independent sector enrolments at a school level. Includes independent Catholic schools.

2.2 SECTOR CLASSIFICATION

This report covers all three schooling sectors: Independent, Catholic and government. There is a subset of Catholic schools that are not members of the Catholic school systems, operate independently and are often members of their respective Association of Independent Schools. The ABS Schools Australia dataset classifies all schools with a Catholic affiliation as 'Catholic' despite the fact that operationally most non-systemic Catholic schools are more similar to Independent schools.

For the purposes of this Research Report, ISA has classified independent Catholic schools to the Independent sector.

Assigning independent Catholic schools to the Independent sector is accomplished by utilising the DESE Non-Government Schools Census, which details enrolments at a school level for all Independent schools, including independent Catholic schools. Independent school enrolments by year (2000-2021), state and grade replace corresponding values from the ABS Schools Australia dataset. Differences are subtracted from the Catholic figures, resulting in reassignment of independent Catholics to the Independent sector.

2.3 DATA INCONSISTENCIES

ABS Schools Australia

Occasionally there are discrepancies that occur in the enrolment data due to jurisdictions making changes in the administration of their education system. These include age realignments between years, changes to school starting ages, and states and territories transitioning year 8 from primary to secondary.

A full list of possible data inconsistencies is available in the ABS Schools Australia explanatory notes.

— ABS Schools Australia 2021 methodology and explanatory notes (covering 2012-2021)

<https://www.abs.gov.au/methodologies/schools-australia-methodology/2021>

— ABS Schools Australia 2012 explanatory notes (covering 1998-2012)

<https://www.abs.gov.au/AUSSTATS/abs@.nsf/Lookup/4221.0Explanatory%20Notes12012>

Data variation is most noticeable when comparing growth levels between a subset of school years (such as Year 7 to Year 12) and state/territory-level time series data.

DESE Non-Government Census

There are instances during 2000-2013 where independent Catholic schools have changed from non-systemic to systemic and do not appear in the dataset in proceeding years. This has also occurred in South Australia for 2021.

This results in some changes in enrolments and growth between the Independent and Catholic sector, most notably in 2010-2014, and 2021 in South Australia, attributed to the changing circumstances of these schools.

KEY FINDINGS

3

- There are currently 4 million full time equivalent students enrolled in Australian schools across all sectors. The government sector has the most enrolments (2.6 million or 65% of total enrolments), followed by the Catholic sector (0.74 million or 18%) and the Independent sector (0.67 million or 17%).
- The overall student population grew by only 0.6% from 2020 to 2021, primarily due to COVID-19 restrictions, and has grown by on average 1.2% per annum over the last five years. Over the past 20 years, Independent sector growth has consistently exceeded student population growth.
- The Independent sector grew by 3.1% from 2020, the sector's strongest growth in more than a decade, despite student population growth of 0.6% and declining enrolments in government schools (-0.3%). 2021 data suggests that Independent schools were preferred by parents during the COVID-19 pandemic. The share of enrolments within the Independent sector increased across every state and territory.
- While population growth in secondary grade levels remains steady, growth is slowing considerably in the primary grades, particularly years 0 and 1 where negative population growth occurred in both 2020 and 2021.
- The government sector's share of enrolments reached 69.3% by 2000 but progressively dropped to a low of 65.1% by 2014. After gradually increasing its enrolment share year on year since, a significant fall in share occurred in 2021, likely due to COVID-19 related factors, resulting in a record low of 65.0%. The Independent sector has increased its enrolment share every year for the past eight consecutive years, climbing steadily to a high of 16.6% in 2021. The Catholic sector share of enrolments peaked in 2013 with a high of 19.3% but has since been on slow decline, with enrolment share currently at 18.4%.
- Over the past five years, the Independent sector has seen an average enrolment growth rate of 2.3% per year which exceeds overall student population growth over the same period (1.2%), followed by the government sector with 1.1% and the Catholic sector with 0.6%. In this time, the government sector has enrolled the highest number of new students (145,443), followed by the Independent sector (73,056) and the Catholic sector (20,517).
- Close to 90% of additional students enrolled in the Independent sector from 2015 onwards were in New South Wales, Victoria and Queensland Independent schools.
- Additional analysis by ISA shows that growth in Independent schools is across all fee levels, with the strongest growth in low fee (below \$5,000 per annum) Independent schools.¹
- Over the last five years, the Queensland Independent sector was the fastest growing state/sector across Australia with an average annual growth of 3.0%, followed by the Victorian Independent sector with 2.8% and the ACT government sector with 2.7%.
- Over the last five years, the Northern Territory Independent sector has shown the least growth of any state/sector across Australia with an average annual growth of -2.7%, followed by the Northern Territory Catholic sector with -1.3% and the Tasmania government sector with -0.2%.

¹ ISA analysis of ACARA My School data.

- ISA projections show that overall school enrolments in Australia could increase by 1.2% per year to 2031, with the Independent sector growing by 2.1% per year, the government sector 1.1% per year and the Catholic sector 0.8% per year. Growth in the Independent sector is driven primarily by Victoria, New South Wales and Queensland. ISA projects that the Independent sector could overtake the Catholic sector in enrolments by 2029.
- Over the next 10 years, ISA projects that Independent schools could enrol an additional 153,000 students. Based on an average school size of 562, around 270 additional Independent schools would be required to accommodate the increase in students. Based on the current distribution of students and schools, it is anticipated that 8 out of 10 of these new schools will need to be located in New South Wales, Victoria and Queensland.

SCHOOL ENROLMENTS OVERVIEW

4

According to the ABS, in 2021 there were 4,025,432 full-time equivalent enrolments in Australia across all school sectors. This is an increase in enrolments of 0.6% across all sectors from 2020, in line with overall Australian population growth.

New South Wales has the highest proportion of student enrolments at 31%, while the Northern Territory enrolls 1% of Australian school students.

Independent schools enrolled 16.6% of all students in Australia, Catholic schools enrolled 18.4% and Government schools enrolled 65.0%.

As noted in the Analysis Notes, this Research Report includes all independent (non-systemic) Catholic affiliated schools in the Independent sector which differs from the ABS methodology. This has the most impact on enrolments in NSW and ACT which have the largest proportion of independent Catholic schools.

FIGURE 4.1 TOTAL STUDENT POPULATION IN AUSTRALIA, 2021

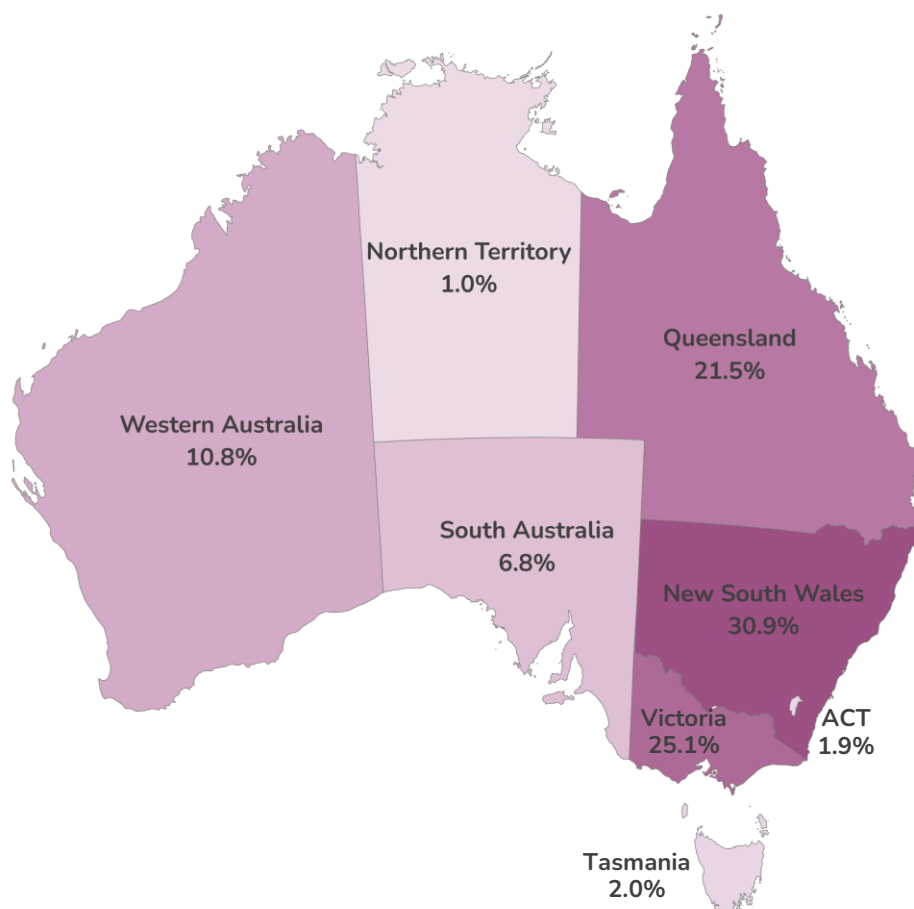
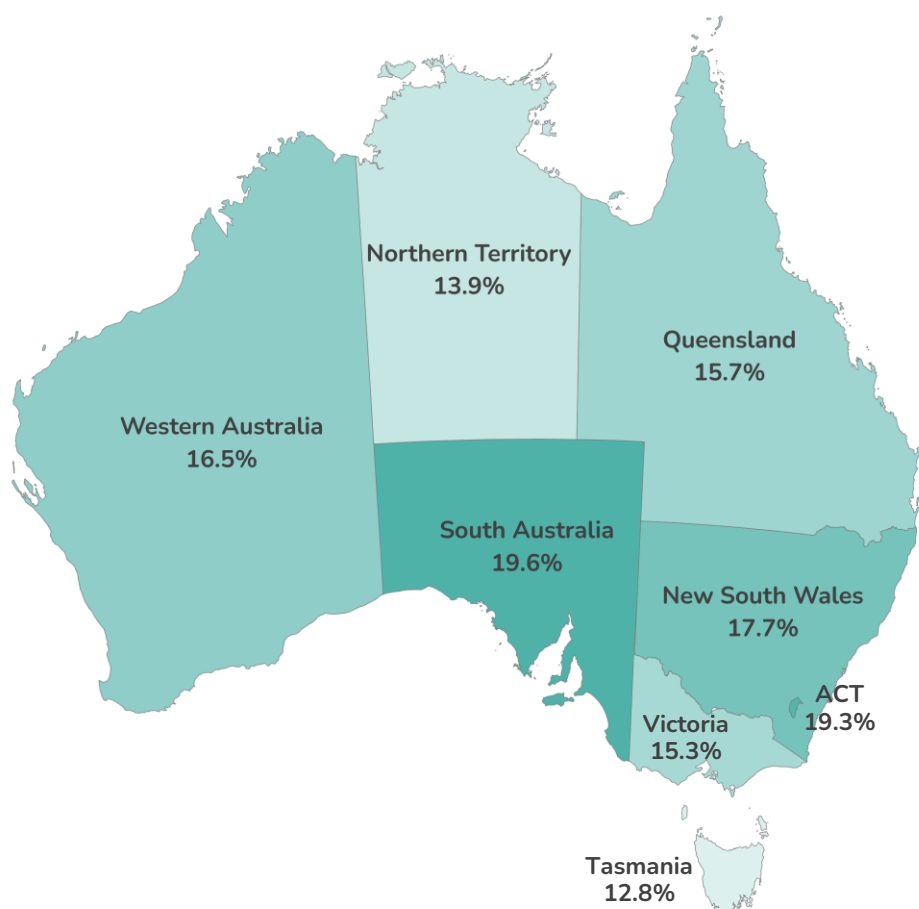


TABLE 4.1 ENROLMENTS BY STATE/TERRITORY AND SECTOR

STATE/TERRITORY	INDEPENDENT	CATHOLIC	GOVERNMENT	TOTAL	PERCENTAGE
NSW	220,405	220,562	802,182	1,243,150	30.9%
VIC	154,690	210,651	644,238	1,009,579	25.1%
QLD	136,227	155,828	573,832	865,888	21.5%
SA	53,531	46,413	173,471	273,415	6.8%
WA	71,893	71,836	292,450	436,179	10.8%
TAS	10,410	15,255	55,839	81,504	2.0%
NT	5,616	4,845	30,002	40,464	1.0%
ACT	14,487	14,675	46,092	75,254	1.9%
Total	667,259	740,065	2,618,108	4,025,432	100.0%
Percentage	16.6%	18.4%	65.0%	100.0%	

The Independent sector enrolls 16.6% of all students within Australia. At a state and territory level this figure varies from a high of 19.6% (South Australia) to a low of 12.8% (Tasmania).

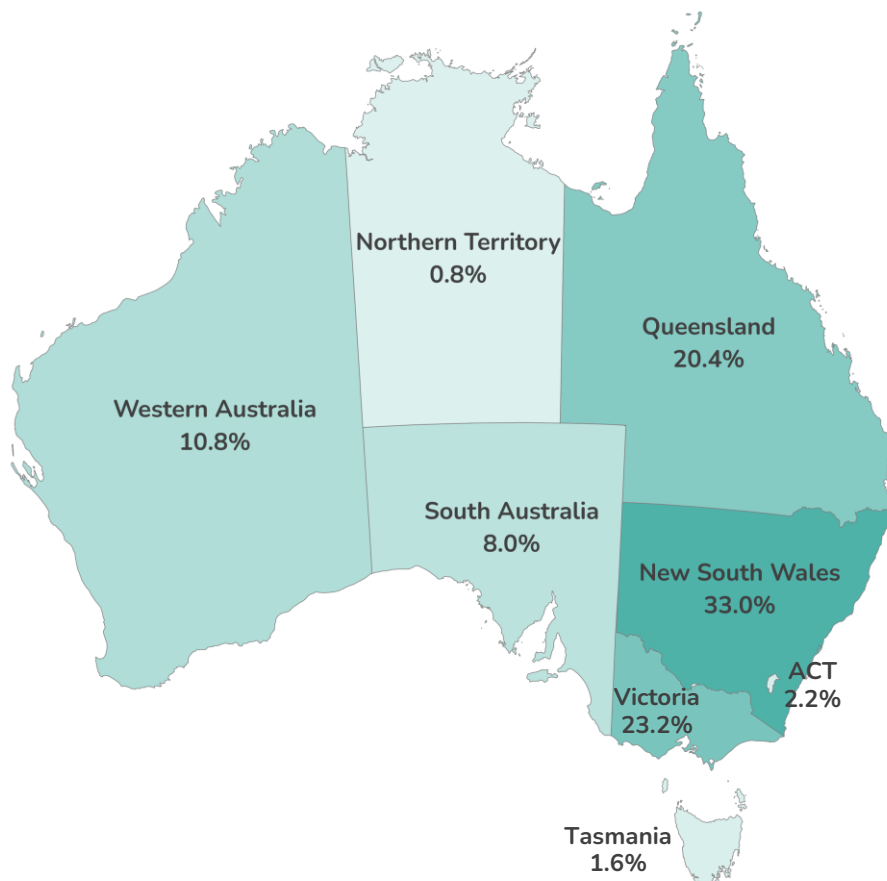
FIGURE 4.2 INDEPENDENT SECTOR SHARE OF TOTAL ENROLMENTS BY STATE, 2021



New South Wales enrolls the most Independent students within the sector, enrolling 33.0% of all Independent school students.

Victoria enrolls the second largest proportion of Independent students with 23.2%, followed by Queensland with 20.4%. The Northern Territory enrolls the lowest proportion of Independent students with 0.8%.

FIGURE 4.3 PROPORTION OF INDEPENDENT SECTOR ENROLMENTS, 2021



GROWTH

5

Over the last five years, total school enrolments across Australia have grown by 1.2% per year. The Independent sector grew by 2.3% per year, government sector grew by 1.1% and the Catholic sector grew by 0.6%.

From 2020 to 2021, the Independent sector increased by 3.1%,

Additional analysis by ISA shows that growth in Independent schools is across all fee levels, with the strongest growth in low fee (below \$5,000 per annum) Independent schools.²

5.1 GROWTH 2016 TO 2021

From 2016 to 2021, average annual growth across all sectors has been 1.2%. Government sector enrolments grew by 1.1% per annum, Independent sector enrolments grew by 2.3% and Catholic sector enrolments grew by 0.6%.

Over this period, the ACT has seen the largest average growth in student population of any state or territory with 2.2% per year. Queensland has the second highest growth with 1.7%. Notably, over the last five years Tasmania has seen minimal additional enrolments in schools, and the Northern Territory has had a reduction in enrolments.

Over the last five years, 81% of all additional enrolments have occurred in New South Wales, Victoria and Queensland despite only enrolling 77% of all students in Australia. In the Independent sector, 87% of additional enrolments are from these states despite only enrolling 77% of all Independent students in Australia.

² ISA analysis of ACARA My School data.

TABLE 5.1 AVERAGE ANNUAL ENROLMENT GROWTH, 2016 TO 2021

STATE/TERRITORY	INDEPENDENT	CATHOLIC	GOVERNMENT	ALL SECTORS
NSW	2.4%	0.2%	0.5%	0.8%
VIC	2.8%	0.3%	1.8%	1.6%
QLD	3.0%	1.3%	1.4%	1.7%
SA	1.0%	1.5%	0.3%	0.6%
WA	1.6%	0.3%	1.5%	1.3%
TAS	2.5%	0.3%	-0.2%	0.2%
NT	-2.7%	-1.3%	0.4%	-0.3%
ACT	1.4%	1.2%	2.7%	2.2%
Total	2.3%	0.6%	1.1%	1.2%

TABLE 5.2 NUMBER OF ADDITIONAL STUDENTS ENROLLED, 2016 TO 2021

STATE/TERRITORY	INDEPENDENT	CATHOLIC	GOVERNMENT	ALL SECTORS
NSW	25,098	2,282	21,583	48,962
VIC	19,714	3,123	54,133	76,970
QLD	18,648	10,030	39,752	68,430
SA	2,583	3,343	2,698	8,624
WA	5,629	1,040	21,428	28,096
TAS	1,226	222	-560	888
NT	-837	-341	572	-605
ACT	996	818	5,837	7,650
Total	73,056	20,517	145,443	239,015

5.2 GROWTH 2020 TO 2021

2021 data shows that the total student population across Australia only grew by 0.6% from the previous year, compared with 1.5% the year before, due to COVID-19 related international border closures which effectively stopped migration to Australia during this period.

However, growth in this period was very strong in the Independent sector (3.1%). The Catholic sector grew by 1.4%, their highest growth rate since 2013. The Government sector declined by 0.3%.

In the past two years, the Catholic sector experienced a strong and notable resurgence in enrolments across most states and territories following a period of decline.

Western Australia and the ACT experienced the highest student population growth, both increasing by 1.5%, while Tasmania and Northern Territory grew the least with growth of -0.4 and -0.6% respectively.

The Independent sector enrolled more additional students than any other sector in 2021 with an additional 19,888 students, while the Catholic sector enrolled an additional 10,248 students and the government sector declined by 6,590 students.

Between 2020 and 2021, 67% of all additional enrolments occurred in New South Wales, Victoria and Queensland. In the Independent sector, 85% of additional enrolments were from these states.

TABLE 5.3 ENROLMENT GROWTH, 2020 TO 2021

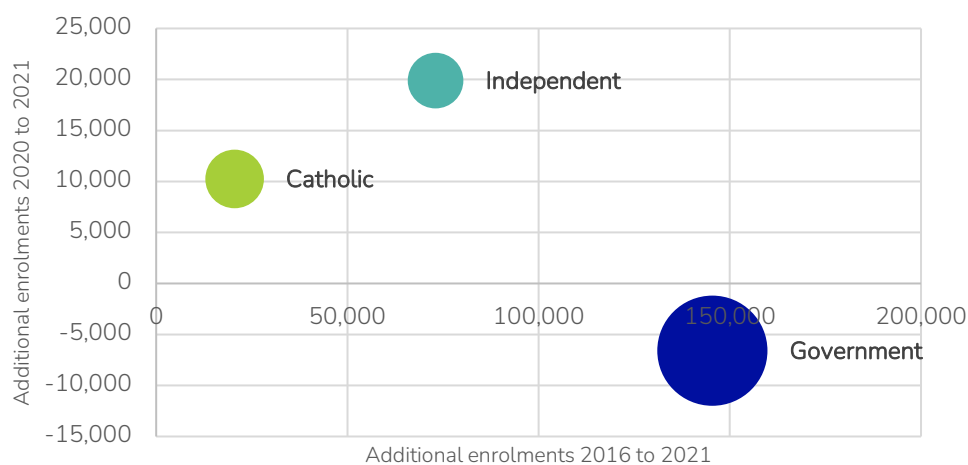
STATE/TERRITORY	INDEPENDENT	CATHOLIC	GOVERNMENT	ALL SECTORS
NSW	3.5%	1.1%	-1.0%	0.2%
VIC	2.3%	0.0%	0.2%	0.5%
QLD	4.5%	1.5%	0.2%	1.1%
SA ³	-1.0%	9.2%	-1.5%	0.2%
WA	4.2%	1.5%	0.9%	1.5%
TAS	4.4%	1.4%	-1.7%	-0.4%
NT	0.2%	1.2%	-1.0%	-0.6%
ACT	2.1%	1.9%	1.2%	1.5%
Total	3.1%	1.4%	-0.3%	0.6%

TABLE 5.4 NUMBER OF ADDITIONAL STUDENTS ENROLLED, 2020 TO 2021

STATE/TERRITORY	INDEPENDENT	CATHOLIC	GOVERNMENT	ALL SECTORS
NSW	7,511	2,301	-7,894	1,918
VIC	3,435	69	1,123	4,627
QLD	5,863	2,314	1,025	9,202
SA ³	-564	3,926	-2,702	659
WA	2,888	1,091	2,574	6,552
TAS	440	210	-947	-297
NT	13	58	-317	-246
ACT	303	280	548	1,130
Total	19,888	10,248	-6,590	23,545

³ In 2021, two independent South Australian Catholic schools joined the Catholic system

FIGURE 5.1 ADDITIONAL ENROLMENTS FROM 2020-2021 AND 2016-2021 BY SECTOR



5.3 GROWTH TRENDS

Growth 2012-2020 (Pre-COVID-19)

The government sector has maintained a steady growth rate from 2013 onwards. The Independent sector's growth has remained generally higher than other sectors and since 2017 the sector's growth rate has increased each consecutive year. The Catholic sector saw a levelling off in growth starting around 2013, followed by five consecutive years of decreasing growth and even negative growth in 2017 and 2018. Recently, the Catholic sector has seen a rebound in growth.

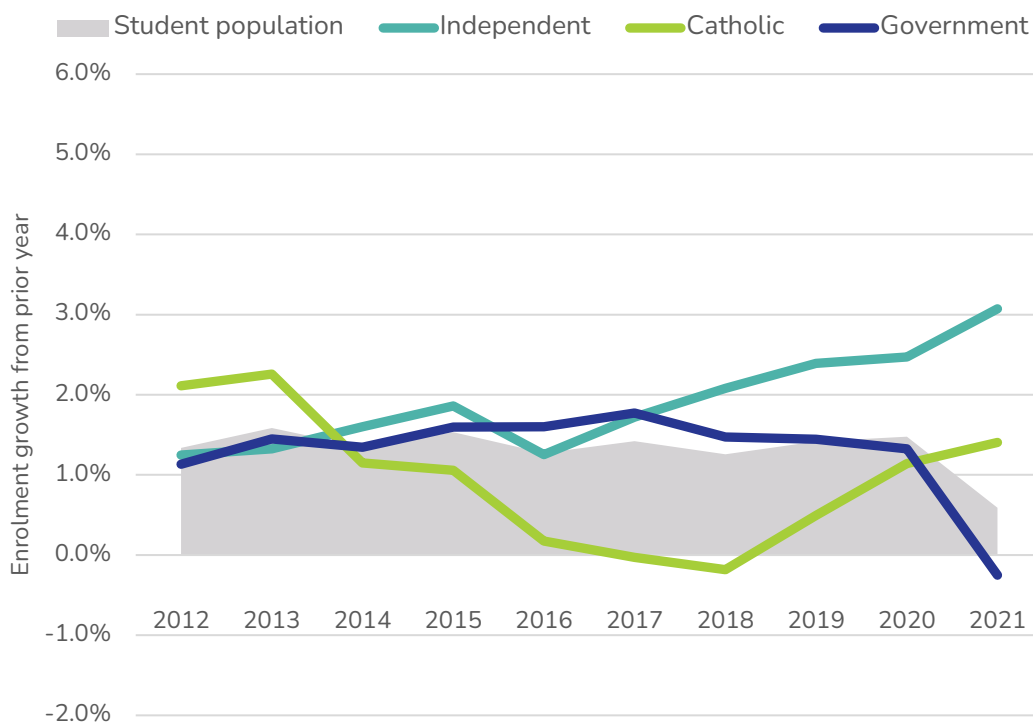
Growth 2021 (Impact of COVID-19)

Enrolments trends in 2021 were heavily influenced by COVID-19 as can be seen in the following charts.

Despite overall student population growth in 2021 being only 0.6% (from 1.5% in 2020), the Independent sector experienced record growth levels (3.1%). This contrasted with the government sector, which, due to its size, typically follows the same trend as student population growth. However, in 2021 the government sector experienced negative growth.

ISA's analysis suggests during the pandemic, many parents chose to enrol their child (or switch to) in an Independent school when pre-COVID they may have enrolled (or were enrolled) in a government school.

FIGURE 5.2 STUDENT ENROLMENT GROWTH BY SCHOOL SECTOR, 2012 TO 2021, ALL GRADES



5.3.1 GROWTH TRENDS BY PRIMARY AND SECONDARY

Growth 2012-2020 (Pre-COVID-19)

In recent years, the secondary-aged student population has continued to increase in contrast with a sharp decline in the number of primary-aged students. In 2020, growth in the secondary-aged student population was 3.1%, while growth in the primary-aged student population was 0.3%. In years 0 and 1, the student population declined by 0.2%, a continuation of an ongoing trend spanning several years.

The government sector has traditionally seen low growth at secondary⁴ school level, well below the other sectors. However, since 2016, secondary growth has been increasing and is now at above average levels. Primary⁵ growth has been above average since 2012 but has slowed considerably due to an overall slowing of the growth of the primary student-aged population. Growth in years 0-1 has historically been higher in the government sector, but since 2019 has slowed considerably and in 2021 experienced negative growth.

⁴ Secondary schooling is classified as years 7 to 12. At present all states and territories classify secondary schooling as years 7 to 12, apart from South Australia who are currently transitioning year 7 from primary to secondary. Queensland and Western Australia changed their year 7 classification from primary to secondary in 2015.

⁵ At present all states and territories classify primary schooling as years 0 to 6, apart from South Australia who are currently transitioning year 7 from primary to secondary. Queensland and Western Australia changed their year 7 classification from primary to secondary in 2015.

The Independent sector has seen consistently high growth at all levels relative to other sectors – secondary, primary and year 0 and 1. The Independent sector has also been a key growth driver in primary enrolments since 2018 onwards.

The Catholic sector experienced a notable reduction in growth across all levels, which started around 2013, but which has now begun to level-off and recover. At the primary level, enrolment numbers in the Catholic sector have held steady for the past few years despite a rapid slowing of the primary-aged student population overall.

Growth 2021 (Impact of COVID-19)

2021 saw a break in many trends due to the pandemic. Student population growth reduced across the board. The government sector has seen a notable reduction in growth from 2020 (from 3.2% to 0.6%) in secondary-aged students, while the Independent and Catholic sectors have generally held steady, despite reduced population growth. The government sector also experienced negative growth in primary-aged students, below student population growth. Both the Independent and Catholic sectors have seen a significant increase in growth in primary-aged students, most notably the Independent sector at 3.3%, significantly above primary-aged student population growth of 0.0%.

FIGURE 5.3 STUDENT ENROLMENT GROWTH BY SCHOOL SECTOR, 2012 TO 2021, SECONDARY – YEAR 7 TO 12

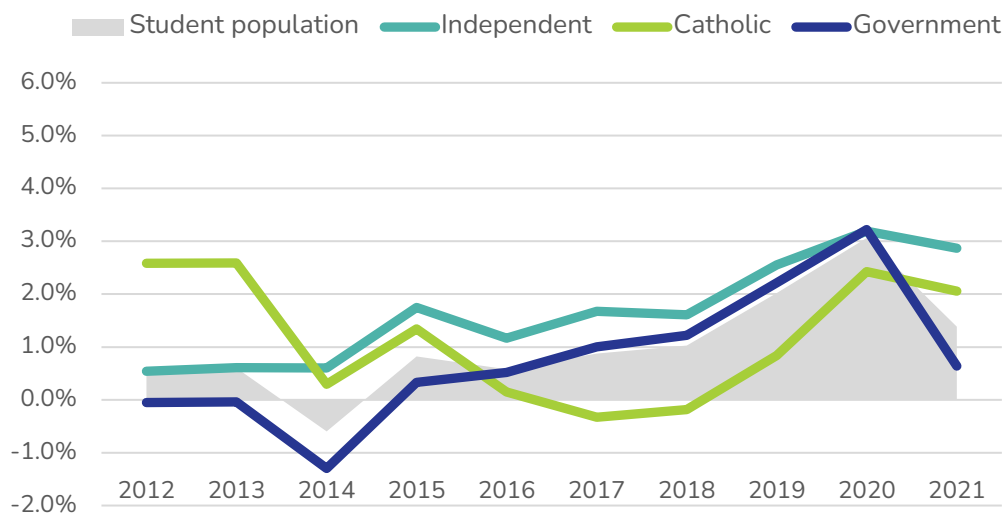
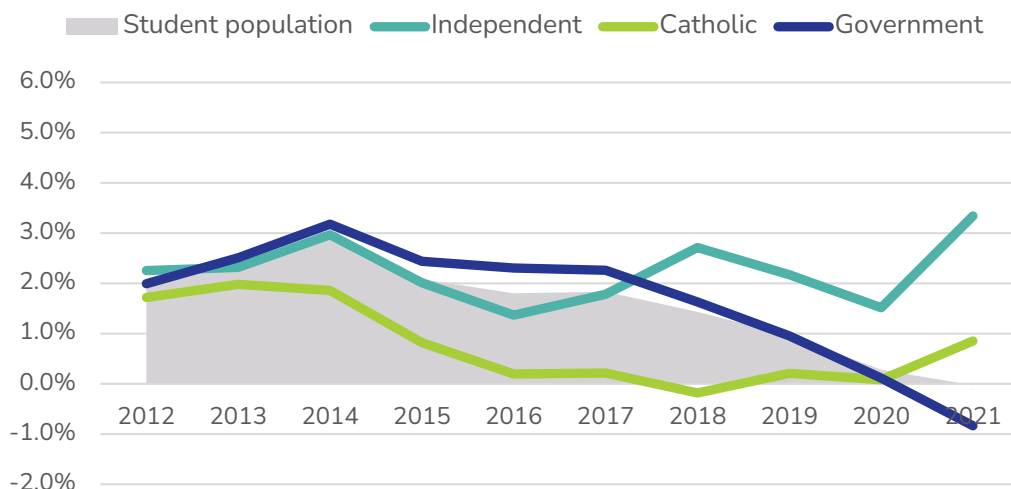


FIGURE 5.4 STUDENT ENROLMENT GROWTH BY SCHOOL SECTOR, 2012 TO 2021, PRIMARY – YEAR 0 TO 6



5.3.2 GROWTH TRENDS BY YEARS 0 AND 1

Differences between school sectors at year 0 (foundation year) and year 1 are a good indicator of the future growth rates of the general school population and the different school sectors, as most students progress through their schooling in the same sector of schooling. In 2021, there were 637,288 students enrolled in year 0 and 1, that is 3,509 less than in 2020, the largest reduction in more than 25 years.

At this level of schooling, sector growth is more variable and is generally influenced by population growth. However, in 2021 growth in these years mirrors trends at the primary and secondary level. The Independent sector has seen very high growth of 3.4% despite the year 0 and 1 population declining by 0.5%. Government sector growth (-1.6%) was significantly below population growth.

FIGURE 5.5 STUDENT ENROLMENT GROWTH BY SCHOOL SECTOR, 2012 TO 2021, YEAR 0 AND 1

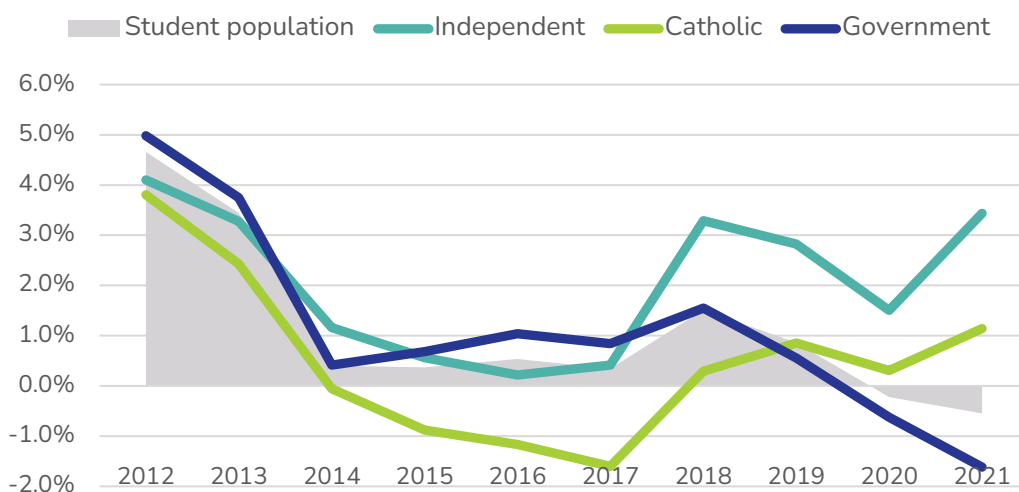


TABLE 5.5 AVERAGE ANNUAL GROWTH BY GRADE LEVEL, 2016 TO 2021

GRADE LEVEL	INDEPENDENT	CATHOLIC	GOVERNMENT	ALL SECTORS
ALL YEARS	2.3%	0.6%	1.1%	1.2%
YEARS 7-12	2.4%	1.0%	1.7%	1.7%
YEARS 0-6	2.3%	0.1%	1.0%	1.0%
YEARS 0-1 ONLY	2.3%	0.2%	0.1%	0.4%

TABLE 5.6 ANNUAL GROWTH BY GRADE LEVEL, 2020 TO 2021

GRADE LEVEL	INDEPENDENT	CATHOLIC	GOVERNMENT	ALL SECTORS
ALL YEARS	3.1%	1.4%	-0.3%	0.6%
YEARS 7-12	2.9%	2.1%	0.6%	1.4%
YEARS 0-6	3.3%	0.7%	-0.7%	0.0%
YEARS 0-1 ONLY	3.4%	1.1%	-1.6%	-0.5%

ENROLMENT SHARE

6

The pandemic resulted in a strong shift towards non-government schools in 2021, with the government school sector's student share the lowest on record (65.0%) and the Independent sector share its highest on record (16.6%).

Between 2000 and 2014, there was a notable but slow shift in enrolments from the government sector to the non-government sector. Over this period, the government sector enrolment share steadily declined from 69.3% to 65.1%. At the same time, the Independent sector share rose from 12.5% to 15.7% and the Catholic sector share grew from 18.2% to 19.2%.

From 2015-2020, the picture changed somewhat with a distinct flow of students back towards government schools, a decline in Catholic share, and Independent schools continuing steady but smaller increases.

In 2021 the government sector enrolment share was 65.0%, its lowest on record. This was due to a very significant loss in enrolment share between 2020 and 2021 reversing all the increases that occurred from 2015 to 2020.

The Catholic sector, following seven consecutive years of enrolment share decline, increased in 2021.

Independent sector enrolment share has increased every year for the last eight consecutive years and is currently at its highest point at 16.6%.

Sector share by state and territory shows mixed results. Since 2016, the government sector has gained student share in four states and territories, the Catholic sector has lost student share in six states and territories, most notably in the ACT and Victoria. The Independent sector has gained student share in six states and territories, most notably in New South Wales and Tasmania.

FIGURE 6.1 STUDENT ENROLMENT SHARE, 2000 TO 2021

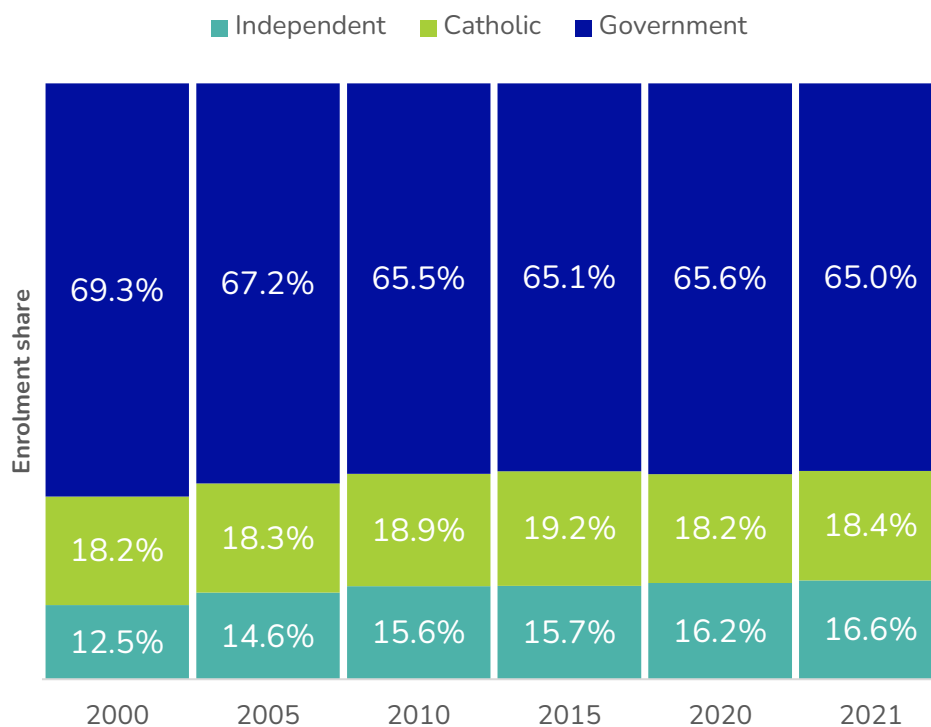
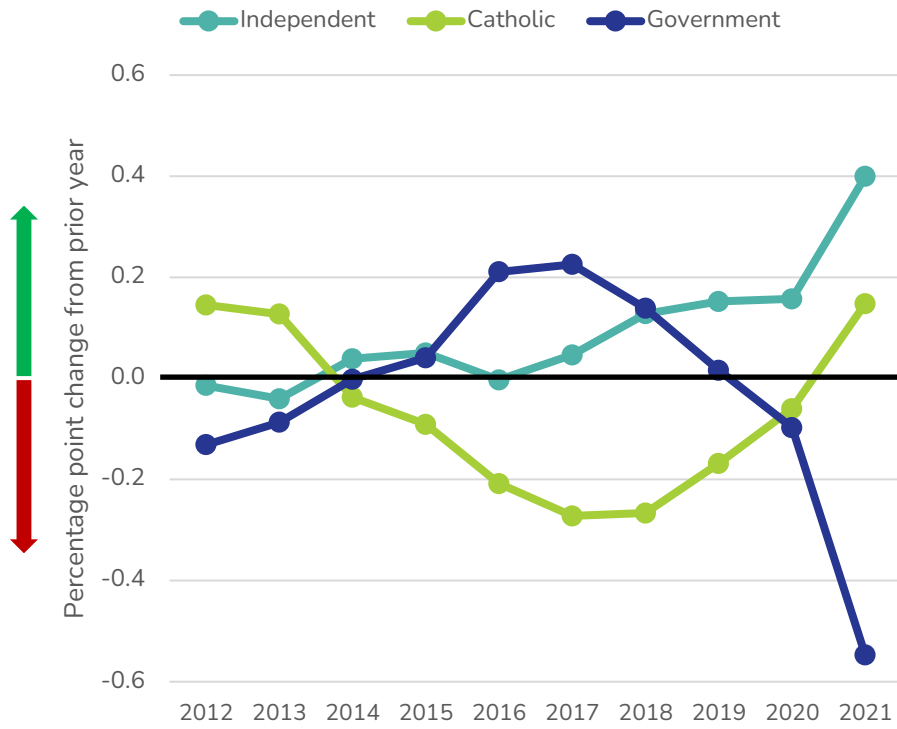


TABLE 6.1 PERCENTAGE POINT CHANGE IN ENROLMENT SHARE, 2016 TO 2021

STATE/TERRITORY	INDEPENDENT	CATHOLIC	GOVERNMENT
NSW	+1.4	-0.5	-0.8
VIC	+0.8	-1.4	+0.5
QLD	+1.0	-0.3	-0.7
SA	+0.3	+0.7	-1.0
WA	+0.2	-0.9	+0.6
TAS	+1.4	+0.1	-1.4
NT	-1.8	-0.7	+2.5
ACT	-0.7	-1.0	+1.7
Total	+0.9	-0.6	-0.3

FIGURE 6.2 ENROLMENT SHARE PERCENTAGE POINT CHANGE FROM PRIOR YEAR, 2012 TO 2021



ENROLMENT PROJECTIONS

7

Independent Schools Australia has used a combination of data from multiple sources to estimate enrolments by school sector and state to 2031.

Note: Caution must be exercised in reviewing these trends. The COVID-19 pandemic resulted in unexpected enrolment patterns in 2021 and it is unclear if these will continue, and/or their duration.

7.1 DATASETS

ABS Schools Australia, Australia Bureau of Statistics

<https://www.abs.gov.au/statistics/people/education/schools/latest-release>

Population Projections, Australian Bureau of Statistics

<https://www.abs.gov.au/statistics/people/population/population-projections-australia/latest-release>

Department of Education, Skills and Employment (DESE) Non-Government Schools Census

The Australian Bureau of Statistics (ABS) produces a series of population projections every five years following the Census of Population and Housing. The current series of projections cover the entire Australian population for the period 2018 to 2066 for each Australian state and territory. The latest data was released on 22nd November 2018.

The ABS release three series of projections (Series A, B, C) based on a possible 72 individual combinations of various assumptions. Series A reflects high assumptions of trends in fertility, life expectancy at birth and migration. Series B reflects current trends, while Series C reflects lower assumptions.

	Life expectancy	Fertility	Net overseas migration	Net interstate migration
Series A	High	High	High	Large
Series B	Medium	Medium	Medium	Medium
Series C	Medium	Low	Low	Small

While not specifically focussed on the student population, the ABS population projections are provided by individual age within the Australian population. By selecting the ages that would best represent school students, age six for Year 1 through to age seventeen for Year 12, the series can be used to project the school age population. The population projections are also provided by gender, state and territory and by city/rest of state within those states and territories. The population projections can be applied directly to actual current student enrolments.

ISA has used Series B projections for this analysis.

7.2 METHODOLOGY

The following provides a high-level outline of the methodology used in calculating sector-level enrolment projections for 2022 to 2031.

Calculate student growth

Using the Population Projections series B, student growth is calculated at a state/territory and year level. This growth is then applied to current 2021 student figures at a state/territory and year level.

Calculate school sector shares

School sector shares are calculated separately by taking the past five years (2017-2021) of historical student data by state/territory, year and sector and forecasting future results using the AAN exponential smoothing model. Various discrepancies in data have been accounted for, including 'half cohorts' of students from Queensland and Western Australia which had caused significant changes to enrolments as the cohort passes through the years.

Apply school sector forecast to student growth projections

School sector share forecasts are applied to student projections. As both student projections and sector share forecasts were calculated at a state/territory and year level, this allows ISA to project future enrolment from the national level down to a state/territory, year and sector level.

Important note

ISA has used the past five years of historical data for projections. As new enrolment trends emerge, such as the strong surge in non-government school enrolments in 2021 and the recent increase in Queensland enrolments, they may impact future projections. If these trends continue, they will be reflected in future updates of this research paper produced by ISA.

7.3 RESULTS

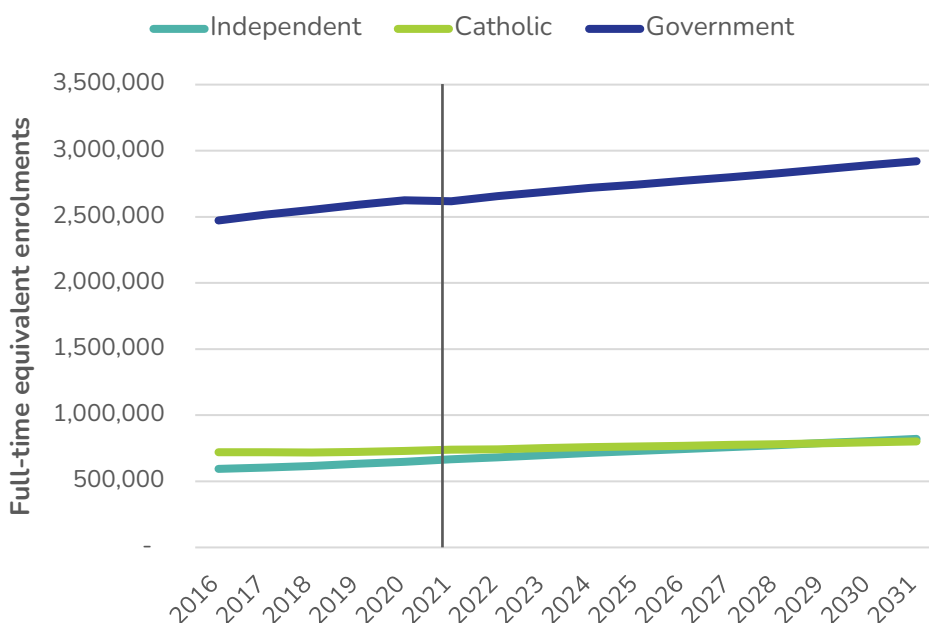
Historically, school enrolments have grown 1.2% per year from 2016 to 2021 with most of the growth seen in the government (1.1%) and Independent (2.3%) sectors.

ISA projections show that to 2031, overall school enrolments could increase by 1.2% per year with the Independent sector growing by 2.1% per year, the government sector by 1.1% and the Catholic sector 0.8% per year. These figures suggest that Independent schools are likely to continue their steady growth and could enrol approximately 153,000 additional students over the next 10 years. This is the equivalent of 270⁶ new schools, based on an average school size of 562⁷ students.

It is likely that 8 out of 10 of these new schools will need to be located in New South Wales, Victoria and Queensland.

ISA projects that the Independent sector enrol more students than the Catholic sector in 2029 and continue to be the fastest growing schooling sector in Australia.

FIGURE 7.1 PROJECTED ENROLMENTS TO 2031



⁶ Assumes all current Independent schools are at capacity.

⁷ Average size of an Independent school, based on Non-Government Schools Census

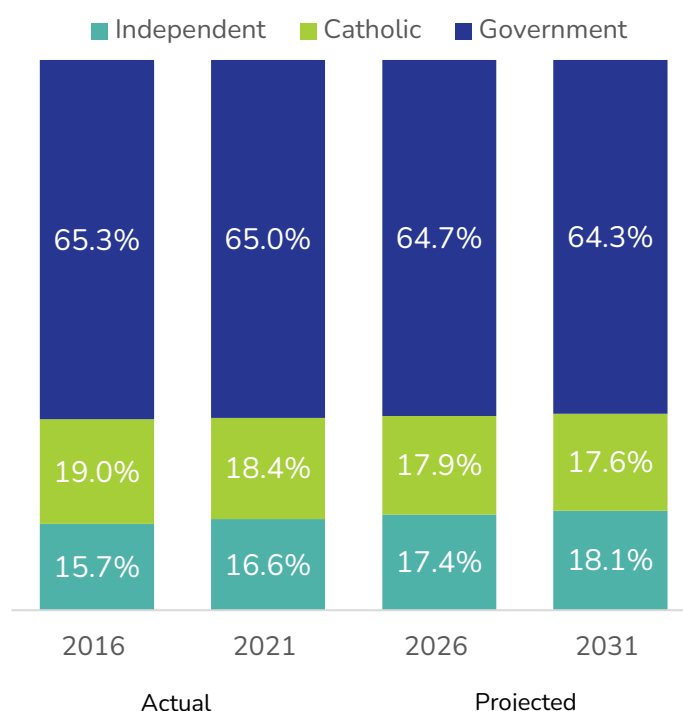
TABLE 7.1 PROJECTED AVERAGE ANNUAL ENROLMENT GROWTH TO 2031

	ACTUAL 2016-2021	PROJECTED 2021-2026	PROJECTED 2026-2031	PROJECTED 2021-2031
INDEPENDENT	2.3%	2.2%	2.0%	2.1%
CATHOLIC	0.6%	0.8%	0.8%	0.8%
GOVERNMENT	1.1%	1.2%	1.0%	1.1%
ALL SECTORS	1.2%	1.3%	1.2%	1.2%

TABLE 7.2 PERCENTAGE POINT CHANGE IN STUDENT SHARE TO 2031

	ACTUAL 2016-2021	PROJECTED 2021-2026	PROJECTED 2026-2031	PROJECTED 2021-2031
INDEPENDENT	+0.9	+0.8	+0.7	+1.5
CATHOLIC	-0.6	-0.4	-0.3	-0.7
GOVERNMENT	-0.3	-0.3	-0.4	-0.8

FIGURE 7.2 PROJECTED SECTOR SHARE TO 2031



The largest **increase** in enrolment share by 2031 is projected to be in the NT government sector (increase from 74.1% to 77.8%) followed by the Tasmanian Independent sector (increase 12.8% to 15.8%).

The largest **decrease** in enrolment share by 2031 is projected to be in the NT Independent sector (decrease from 13.9% to 10.3%) followed by the Tasmanian government sector (decrease 68.5% to 65.1%)

TABLE 7.3 PROJECTED CHANGE IN ENROLMENT SHARE FROM 2021 TO 2031

		INDEPENDENT	CATHOLIC	GOVERNMENT
AUSTRALIA	2021 (Current)	16.6%	18.4%	65.0%
	2031 (Projected)	18.1%	17.6%	64.3%
	Change	+1.5	-0.7	-0.8
NSW	2021 (Current)	17.7%	17.7%	64.5%
	2031 (Projected)	19.4%	16.7%	63.9%
	Change	+1.7	-1.0	-0.6
VIC	2021 (Current)	15.3%	20.9%	63.8%
	2031 (Projected)	16.6%	19.0%	64.4%
	Change	+1.3	-1.9	+0.6
QLD	2021 (Current)	15.7%	18.0%	66.3%
	2031 (Projected)	18.1%	18.0%	63.9%
	Change	+2.4	0.0	-2.4
SA	2021 (Current)	19.6%	17.0%	63.4%
	2031 (Projected)	19.8%	19.9%	60.3%
	Change	+0.2	+2.9	-3.1
WA	2021 (Current)	16.5%	16.5%	67.0%
	2031 (Projected)	17.7%	15.2%	67.1%
	Change	+1.2	-1.3	+0.1
TAS	2021 (Current)	12.8%	18.7%	68.5%
	2031 (Projected)	15.8%	19.1%	65.1%
	Change	+3.0	+0.4	-3.4
NT	2021 (Current)	13.9%	12.0%	74.1%
	2031 (Projected)	10.3%	11.9%	77.8%
	Change	-3.6	-0.1	+3.7
ACT	2021 (Current)	19.3%	19.5%	61.2%
	2031 (Projected)	18.7%	18.8%	62.6%
	Change	-0.6	-0.7	+1.3

TABLE 7.4 PROJECTED ADDITIONAL ENROLMENTS TO 2031

SECTOR	CURRENT ENROLMENTS 2021	PROJECTED ENROLMENTS 2026	PROJECTED ENROLMENTS 2031	ADDITIONAL ENROLMENTS 2021-2026	ADDITIONAL ENROLMENTS 2026-2031	ADDITIONAL ENROLMENTS 2021-2031
INDEPENDENT	667,259	744,437	820,864	+77,178	+76,428	+153,605
CATHOLIC	740,065	768,853	801,698	+28,787	+32,845	+61,633
GOVERNMENT	2,618,108	2,773,129	2,920,534	+155,021	+147,405	+302,427
ALL SECTORS	4,025,432	4,286,418	4,543,097	+260,986	+256,679	+517,665