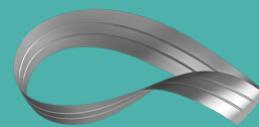

**SCHOOL
ENROLMENT
TRENDS AND
PROJECTIONS
ISA RESEARCH
REPORT**

JULY 2021



**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 Australian 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 (2020 data).
- Historical analysis of enrolments (enrolment figures, growth, share).
- Projections of future enrolments to 2030.

All historical charts and tables presented in the body of this document are drawn from an in-depth analysis of ABS Schools Australia and the Department of Education, Skills and Employment (DESE) Non-Government Schools Census. Enrolment projections for 2021-2030 are based on ISA's own internal analysis utilising ABS Schools Australia, the DESE Non-Government Schools Census and the latest ABS Population Projections data.

ANALYSIS NOTES

2

2.1 DATA SOURCES

This report utilises primarily 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 data files. Enrolment projections use these two data sources in addition to the ABS Population Projections dataset.

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

Non-public data source 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 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 (2000-2020), 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 2020 methodology and explanatory notes (covering 2012-2020)
<https://www.abs.gov.au/methodologies/schools-australia-methodology/2020>
- ABS Schools Australia 2012 explanatory notes (covering 2012-2002)
<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 independent/non-systemic to systemic and do not appear in the dataset in proceeding years.

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

KEY FINDINGS

3

The Key Findings following include all independent (non-systemic) Catholic affiliated schools in the Independent sector.

- 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 66% of total enrolments), followed by the Catholic sector (0.7 million or 18%) and the Independent sector (0.6 million or 16%).
- The overall student population grew 1.5% from 2019 and has grown by 1.4% per annum over the last five years. Over the past 20 years, Independent sector growth has consistently exceeded student population growth.
- While population growth in secondary grade levels remains steady, growth is slowing considerably in primary grade levels within Australia, particularly at years 0-1 where negative population growth occurred in 2020.
- The government sector's share of enrolments reached 69.3% by 2000 but progressively dropped to a low of 65.1% by 2014. Since then, the government sector has been gradually increasing its enrolment share year on year. The Independent sector has increased its enrolment share every year since 2000, starting at 12.5% and climbing steadily to a high of 16.2% in 2020. 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 18.2%.
- Over the past five years, the Independent sector has seen an average enrolment growth rate of 2.0% per year which exceeds overall student population growth over the same period (1.4%), followed by the government sector with 1.5% and the Catholic sector with 0.3%. In this time, the government sector has enrolled the highest number of new students (190,988), followed by the Independent sector (60,523) and the Catholic sector (11,533).
- Close to 90% of additional students enrolled in the Independent sector from 2015 onwards were from New South Wales, Victoria and Queensland schools.
- Analysis by ISA shows that growth in Independent schools is across all fee levels, with the strongest growth in low fee (below \$6,000 per annum) Independent schools.¹
- Over the last five years, the ACT Government sector has been the fastest growing region/sector across Australia with an average annual growth of 3.3%, followed by the Victorian Independent sector with 2.7%.
- Over the last five years, the Northern Territory Independent sector has shown the least growth of any region/sector across Australia with an average annual growth of -3.0%, followed by the Northern Territory Catholic sector with -1.4%.
- The Independent sector grew by 2.5% from 2019, the sector's strongest growth in more than a decade. However, impacts from the COVID-19 pandemic are difficult to ascertain from current data, as enrolments were captured in August 2020, mid-way through the schooling year. It is anticipated that 2021 enrolments will provide a clearer picture.
- ISA projections show that overall school enrolments in Australia could increase by 1.3% per year to 2030, with the Independent sector growing by 2.0% per year, government sector 1.4% per year and Catholic sector 0.4% per year. Growth in the Independent sector is driven primarily by Victoria, New South Wales and Queensland. ISA has projected the Independent sector could overtake the Catholic sector in terms of enrolments by the end of 2028.

¹ ISA analysis of ACARA My School data.

- Over the next 10 years, it is projected that Independent schools may enrol an additional 131,000 students. Based on an average school size of 542, around 242 additional Independent schools would be required to accommodate the increase in students. It is likely, that 8 out of 10 of these new schools will need to be in New South Wales, Victoria and Queensland.

SCHOOL ENROLMENTS OVERVIEW

4

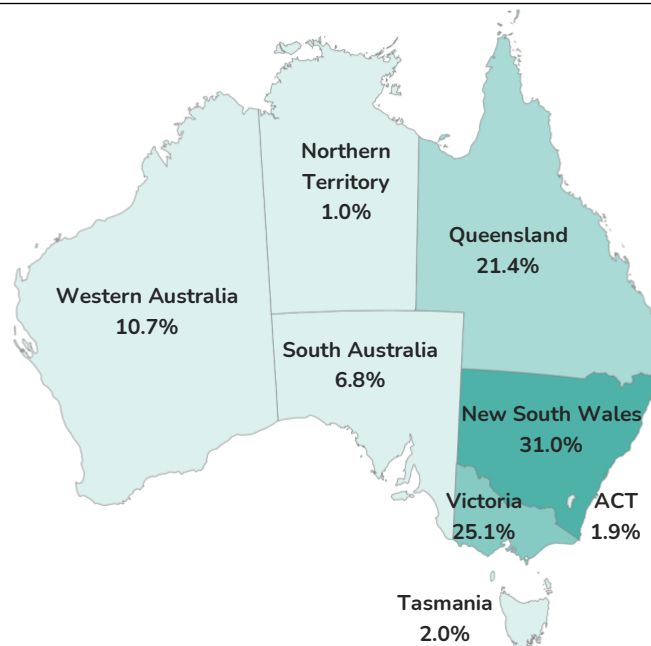
According to the ABS, in 2020 there were 4,001,887 full-time equivalent enrolments in Australia across all school sectors. This is an increase in enrolments of 1.5% across all sectors from 2019, in line with overall Australian population growth.

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.

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 16.2% of all students in Australia, Catholic schools enrolled 18.2% and Government schools enrolled 65.6%.

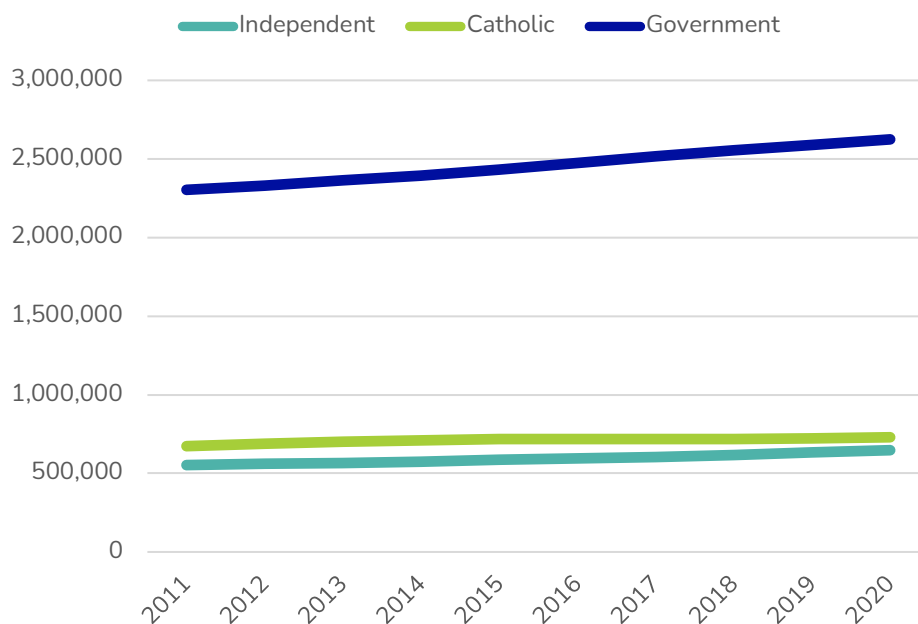
TOTAL ENROLMENTS IN AUSTRALIA 2020



STATE/TERRITORY	INDEPENDENT	CATHOLIC	GOVERNMENT	TOTAL	PERCENTAGE
NSW	212,894	218,261	810,077	1,241,232	31.0%
VIC	151,255	210,582	643,115	1,004,952	25.1%
QLD	130,364	153,514	572,808	856,686	21.4%
SA	54,095	42,488	176,173	272,756	6.8%
WA	69,006	70,745	289,876	429,627	10.7%
TAS	9,969	15,045	56,786	81,800	2.0%
NT	5,603	4,787	30,319	40,710	1.0%
ACT	14,184	14,395	45,545	74,124	1.9%
Total	647,371	729,817	2,624,698	4,001,887	100.0%
Percentage	16.2%	18.2%	65.6%	100.0%	

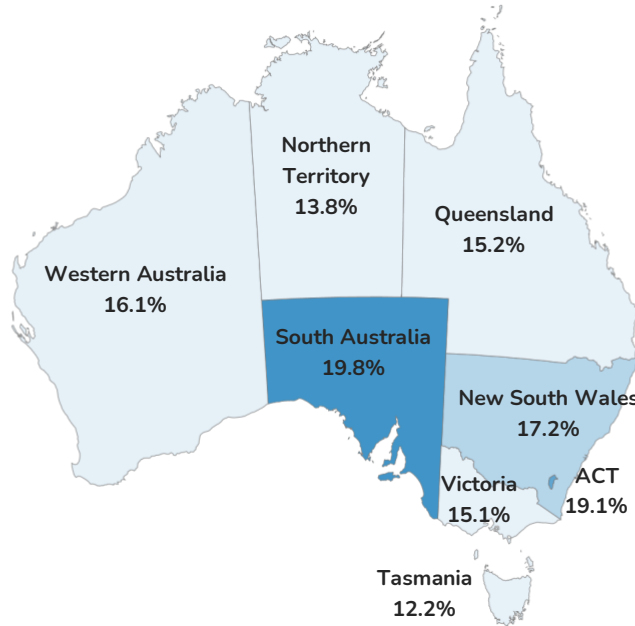
ENROLMENT BY SECTOR

2011-2020



The Independent sector enrolls 16.2% of all students within Australia. At a state and territory level this figure varies from a high of 19.8% (South Australia) to a low of 12.2% (Tasmania).

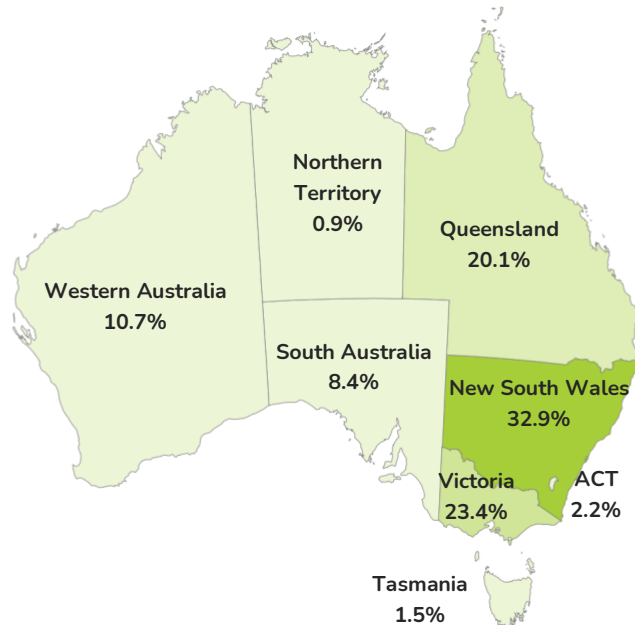
INDEPENDENT SECTOR SHARE WITHIN EACH STATE 2020



New South Wales enrolls the most Independent students within the sector, enrolling 32.9% of all Independent school students.

Victoria enrolls the second largest proportion of Independent students with 23.4%, followed by Queensland with 20.1%. Northern Territory enrolls the lowest proportion of Independent students with 0.9%.

PROPORTION OF INDEPENDENT SECTOR ENROLMENTS 2020



GROWTH

5

Over the last five years, total school enrolments across Australia have grown by 1.4% per year. The Independent sector grew by 2.0% per year, government sector grew by 1.5% and the Catholic sector grew by 0.3%.

From 2019 to 2020, the Independent sector increased by 2.5%, government sector enrolments increased by 1.3% and Catholic sector enrolments increased by 1.1%.

Analysis by ISA shows that growth in Independent schools is across all fee levels, with the strongest growth in low fee (below \$6,000 per annum) Independent schools.²

5.1 GROWTH 2015 TO 2020

From 2015 to 2020, average annual growth across all sectors has been 1.4%. Government sector enrolments grew by 1.5%, Independent sector enrolments grew by 2.0% and Catholic sector enrolments grew by 0.3%.

Over this period, the ACT has seen the largest average growth in student population of any state or territory with 2.3% per year. Victoria has the second highest growth with 1.9%. Notably, over the last five years the Northern Territory and Tasmania have seen minimal additional enrolments in schools.

Over the last five years, 83% of all additional enrolments have occurred in New South Wales, Victoria and Queensland. In the Independent sector, 89% of additional enrolments are from these states.

ENROLMENT GROWTH

2015 TO 2020

STATE/TERRITORY	INDEPENDENT	CATHOLIC	GOVERNMENT	ALL SECTORS
NSW	2.1%	0.0%	1.0%	1.0%
VIC	2.7%	0.4%	2.2%	1.9%
QLD	2.2%	1.1%	1.8%	1.7%
SA	1.3%	-0.8%	0.9%	0.7%
WA	0.7%	0.1%	1.6%	1.2%
TAS	1.6%	0.2%	0.1%	0.3%
NT	-3.0%	-1.4%	1.0%	0.1%
ACT	1.3%	0.5%	3.3%	2.3%
Total	2.0%	0.3%	1.5%	1.4%

² ISA analysis of ACARA My School data.

NUMBER OF ADDITIONAL STUDENTS ENROLLED 2015 TO 2020

STATE/TERRITORY	INDEPENDENT	CATHOLIC	GOVERNMENT	ALL SECTORS
NSW	21,471	57	38,099	59,627
VIC	19,068	4,484	66,282	89,834
QLD	13,624	8,224	47,845	69,692
SA	3,406	-1,647	7,734	9,494
WA	2,263	243	22,462	24,969
TAS	759	144	291	1,194
NT	-933	-348	1,437	157
ACT	866	375	6,839	8,079
Total	60,523	11,533	190,988	263,045

5.2 GROWTH 2019 TO 2020

By mid-2020, the total student population across Australia had grown by 1.5% from the previous year. Growth has been especially strong in the Independent sector (2.5%). The Catholic sector grew by 1.1%, their highest growth since 2014. The Government sector grew by 1.3%.

Queensland was the state that experienced the highest student population growth, with an increase of 2.8%, while South Australia, Tasmania and Northern Territory grew the least with 0.4%.

In the past year, the Catholic sector has seen a strong and notable resurgence in enrolments across most states and territories.

It is important to note that even though the Independent school sector saw growth higher than other school sectors, due to the size differences between the sectors, the government sector enrolled by far the most additional students. In 2020, the government sector enrolled an additional 34,322 students, over twice the Independent sector's additional 15,609. Catholic enrolments increased by 8,245.

Over past year, 83% of all additional enrolments have occurred in New South Wales, Victoria and Queensland. In the Independent sector, 87% of additional enrolments are from these states.

ENROLMENT GROWTH 2019 TO 2020

STATE/TERRITORY	INDEPENDENT	CATHOLIC	GOVERNMENT	ALL SECTORS
NSW	1.9%	0.5%	0.5%	0.8%
VIC	2.7%	0.7%	1.6%	1.6%
QLD	4.5%	3.1%	2.3%	2.8%
SA	1.4%	1.5%	-0.1%	0.4%
WA	1.8%	0.1%	1.8%	1.5%
TAS	2.7%	0.8%	-0.1%	0.4%
NT	-4.5%	-1.2%	1.6%	0.4%
ACT	0.6%	2.6%	3.0%	2.5%
Total	2.5%	1.1%	1.3%	1.5%

NUMBER OF ADDITIONAL STUDENTS ENROLLED

2019 TO 2020

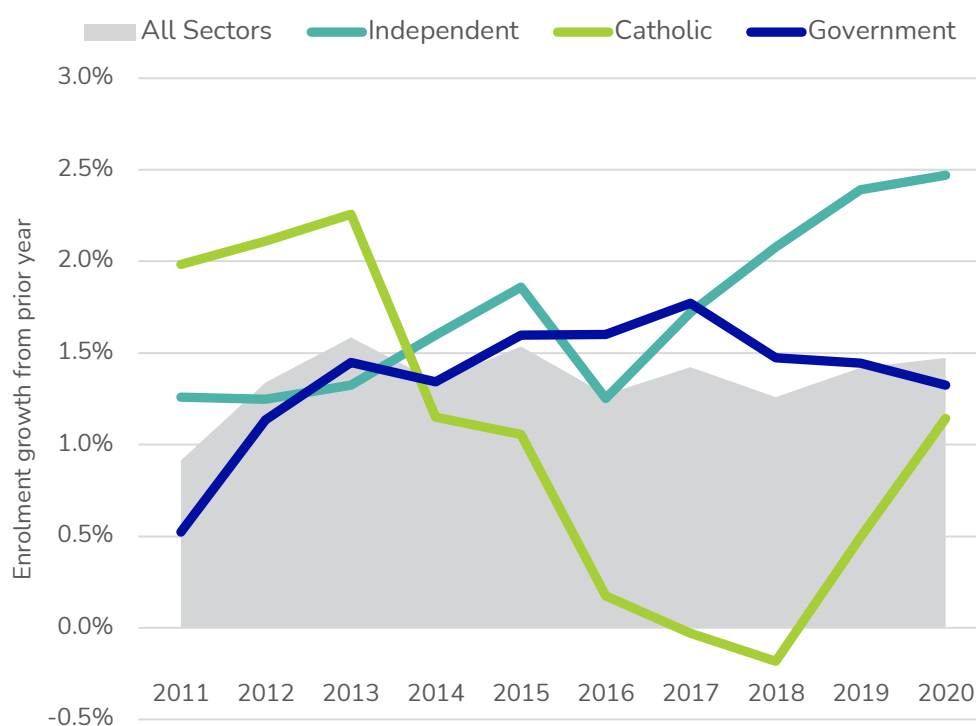
STATE/TERRITORY	INDEPENDENT	CATHOLIC	GOVERNMENT	ALL SECTORS
NSW	4,040	1,124	4,404	9,568
VIC	3,937	1,377	10,400	15,714
QLD	5,577	4,615	12,929	23,122
SA	744	643	-197	1,189
WA	1,235	62	5,026	6,322
TAS	258	123	-44	338
NT	-261	-59	469	149
ACT	79	360	1,335	1,774
Total	15,609	8,245	34,322	58,176

5.3 GROWTH TRENDS

Growth trends of student enrolments over the past ten years shows 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, has seen consecutive increases in growth from prior years. 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 2017-2018. The last two years have seen a rebound in growth for the Catholic sector.

STUDENT ENROLMENT GROWTH BY SCHOOL SECTOR

ALL GRADES



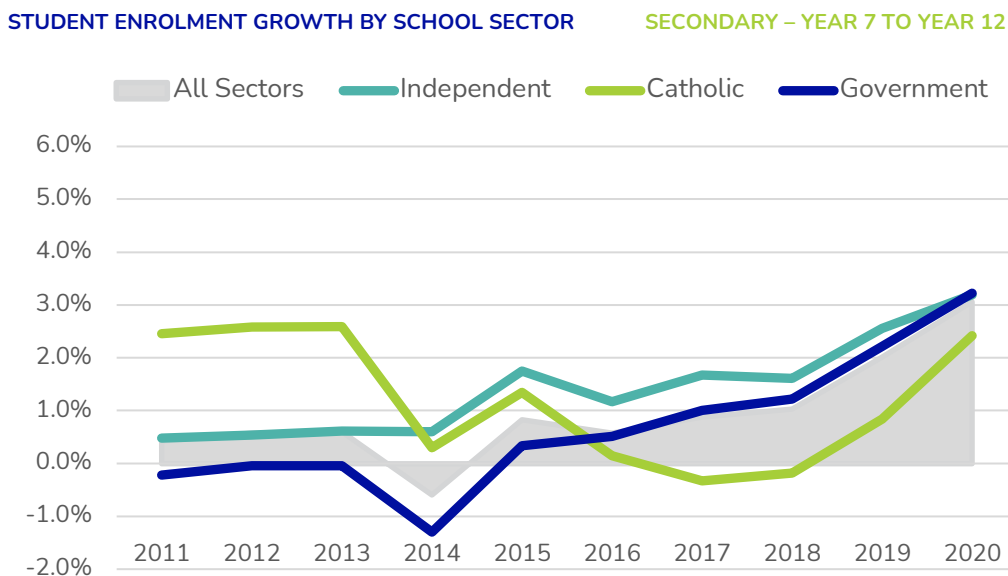
5.3.1 GROWTH TRENDS BY PRIMARY AND SECONDARY

In recent years, the secondary-aged student population has increased 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 0-1, the student population declined by 0.2%. It is possible some impact is related to the COVID-19 pandemic; however, this appears to be the continuation of an ongoing trend spanning several years.

The government sector traditionally has seen low growth at secondary³ school level, well below other sectors. However, since 2016, secondary growth has been increasing and is now at above average levels. Primary⁴ level growth has been above average since 2012 onwards but has slowed considerably due to an overall slowing of the primary student-aged population. Years 0-1 growth has historically been higher in the government sector, but since 2019 has slowed considerably and is now experiencing negative growth.

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

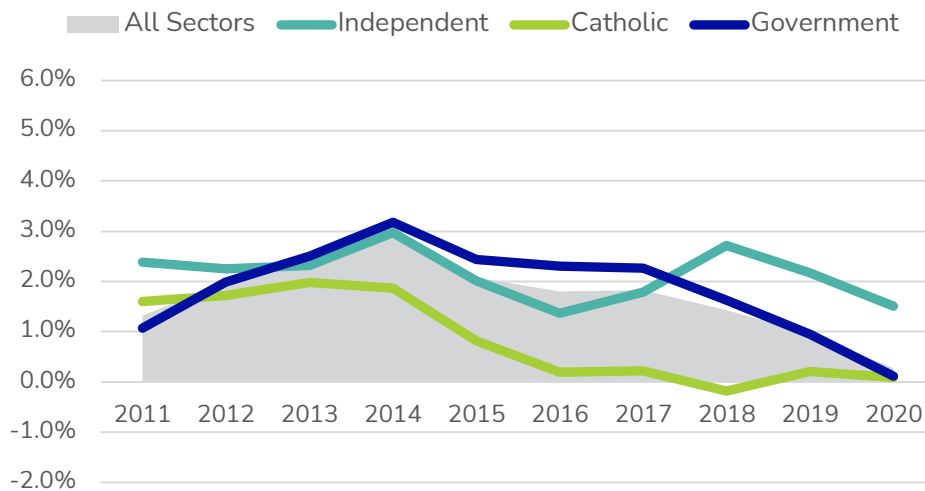
The Catholic sector has seen a notable reduction in growth across all levels, which started around 2013, and has now begun to level-off and recover. At the primary level, enrolment numbers in the Catholic sector have held steady for the past few years despite a rapid slowing of the primary-aged student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



³ Classified secondary schooling 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.

⁴ 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.

STUDENT ENROLMENT GROWTH BY SCHOOL SECTOR PRIMARY – YEAR 0 TO YEAR 6



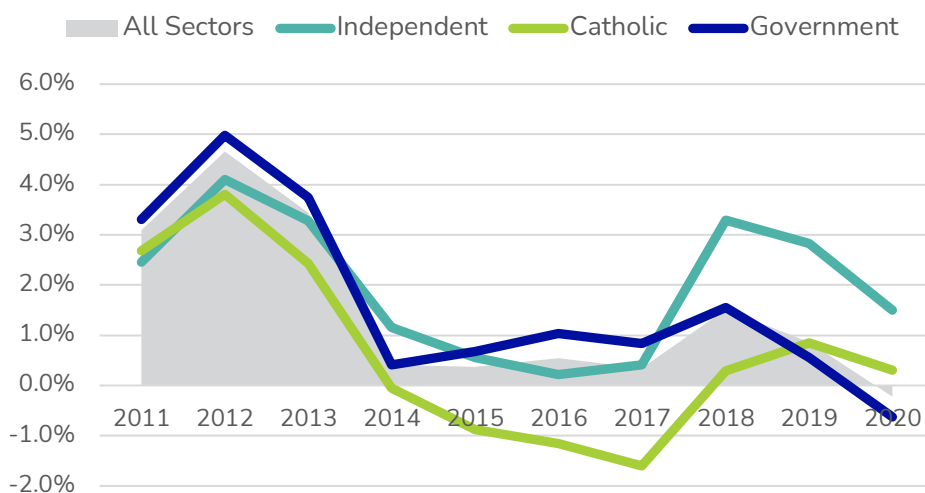
5.3.2 GROWTH TRENDS BY YEAR 0 / YEAR 1

Differences between school sectors at a Year 0 (foundation year) and Year 1 level are a good indicator of where the school sectors and general school populations may be heading in the future, as enrolments from these years progress through their schooling. In 2020, there were 640,797 students enrolled in Year 0-1, that is 1,428 less than in 2019.

Sector growth at this level is more variable and is generally influenced by population growth.

The government sector has been on or exceeding Year 0/Year 1 population growth since 2011, but in recent times appears to have lost some growth to the Catholic sector. The Independent sector has historically seen growth levels comparable to the government sector, and from 2018 onwards has seen an increase in enrolments above the growth of the overall student population. Year 0 to Year 1 growth in the Catholic sector has historically been below population growth and saw a substantial drop-off from 2012 onwards, but this trend has recently reversed with an increase from 2018 relative to the overall student population.

STUDENT ENROLMENT GROWTH BY SCHOOL SECTOR YEAR 0 / YEAR 1



AVERAGE ANNUAL GROWTH BY GRADE LEVEL

2015 TO 2020

GRADE LEVEL	INDEPENDENT	CATHOLIC	GOVERNMENT	ALL SECTORS
ALL YEARS	2.0%	0.3%	1.5%	1.4%
YEARS 7-12	2.0%	0.6%	1.6%	1.5%
YEARS 0-6	2.0%	0.2%	1.6%	1.4%
YEARS 0-1 ONLY	1.6%	-0.3%	0.7%	0.6%

AVERAGE ANNUAL GROWTH BY GRADE LEVEL

2019 TO 2020

GRADE LEVEL	INDEPENDENT	CATHOLIC	GOVERNMENT	ALL SECTORS
ALL YEARS	2.5%	1.1%	1.3%	1.5%
YEARS 7-12	3.2%	2.4%	3.2%	3.1%
YEARS 0-6	1.6%	0.1%	0.2%	0.3%
YEARS 0-1 ONLY	1.5%	0.3%	-0.6%	-0.2%

ENROLMENT SHARE

6

Since 2000, several national trends have emerged, including a slow shift of enrolments from the government sector to the non-government sector from 2000 to 2014. During that time, the government’s sector share steadily declined from 69.3% to 65.1%. The Independent sector’s share rose from 12.5% to 15.7% and the Catholic sector’s share grew from 18.2% to 19.2%.

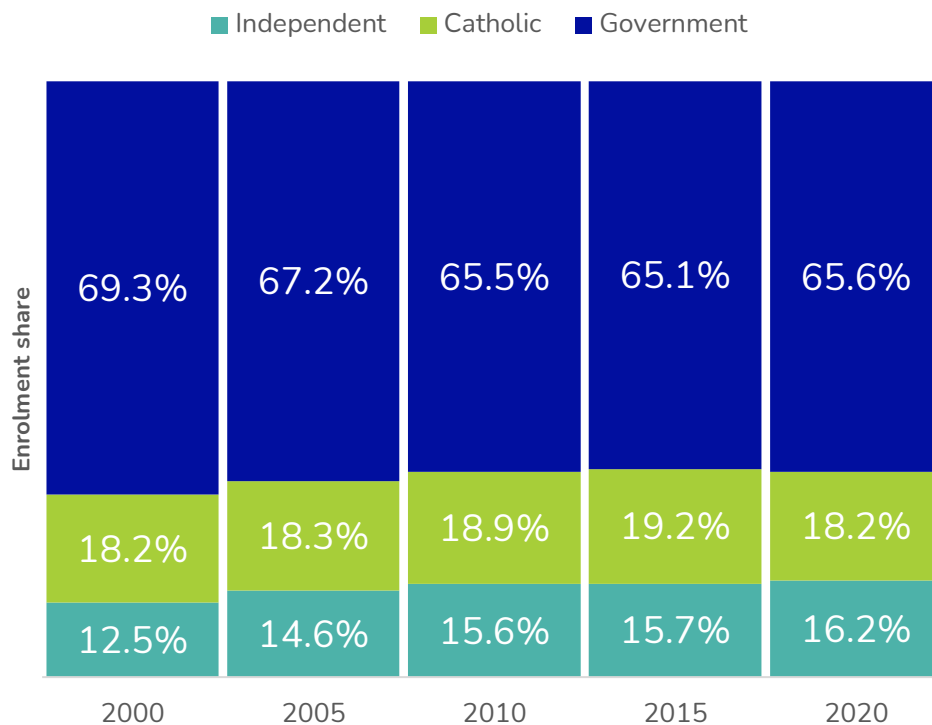
From 2015 onwards, the picture changed somewhat with a distinct flow back towards government schools, a decline in Catholic share, and Independent schools continuing steady increases.

The government sector’s student share is currently 65.6%, up from a low of 65.1% in 2014. The Catholic sector which had 14 consecutive years of enrolment share increases from 2000 to 2013, is now on seven consecutive years of enrolment share decline. The Independent sector enrolment share has increased every year since 2000 (the furthest data this research project analyses) and is currently at its highest point at 16.2%.

Sector share by state and territory shows mixed results. Since 2015, the government sector has gained student share in all states and territories apart from New South Wales and Tasmania. The Catholic sector has lost student share in every state and territory, most notably in the ACT and Victoria. The Independent sector has gained student share in five of eight states and territories: New South Wales, Tasmania, Victoria, South Australia and Queensland.

STUDENT ENROLMENT SHARE

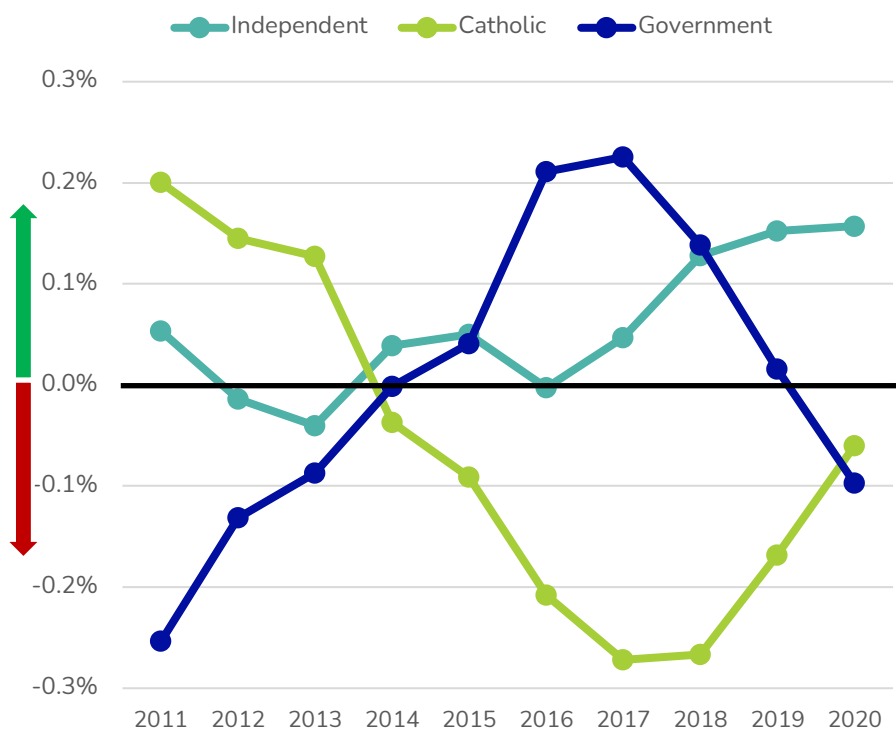
2000 - 2020



PERCENTAGE POINT CHANGE IN ENROLMENT SHARE 2015 TO 2020

STATE/TERRITORY	INDEPENDENT	CATHOLIC	GOVERNMENT
NSW	+1.0	-0.9	-0.1
VIC	+0.6	-1.6	+1.0
QLD	+0.4	-0.5	+0.2
SA	+0.6	-1.2	+0.6
WA	-0.4	-1.0	+1.4
TAS	+0.8	-0.1	-0.7
NT	-2.4	-0.9	+3.3
ACT	-1.0	-1.8	+2.8
Total	+0.5	-1.0	+0.5

ENROLMENT SHARE PERCENTAGE POINT CHANGE FROM PRIOR YEAR 2011 TO 2020



ENROLMENT PROJECTIONS

7

Independent Schools Australia has used a combination of data from multiple sources to estimate enrolments by school sector and state to 2030.

Note: Caution must be exercised in reviewing these trends. It is too early to account for the trends that have emerged in 2020, particularly in relation to Catholic sector enrolments and the impacts of COVID.

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/AUSSTATS/abs@.nsf/mf/3222.0>

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 current actual 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 2021 to 2030.

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 2020 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 (2016-2020) 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 see future enrolment projections from a national level, down to a state/territory, year and sector level.

Important note

ISA has used the past five years historical data for projections. There will often be new trends emerging, most notably in 2020 in the Catholic sector which has seen a sharp increase in enrolments relative to the four preceding years. Queensland has also seen a surge in enrolments recently. 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 1.4% per year from 2015 to 2020 with most of the growth seen in the government (1.5%) and Independent (2.0%) sectors.

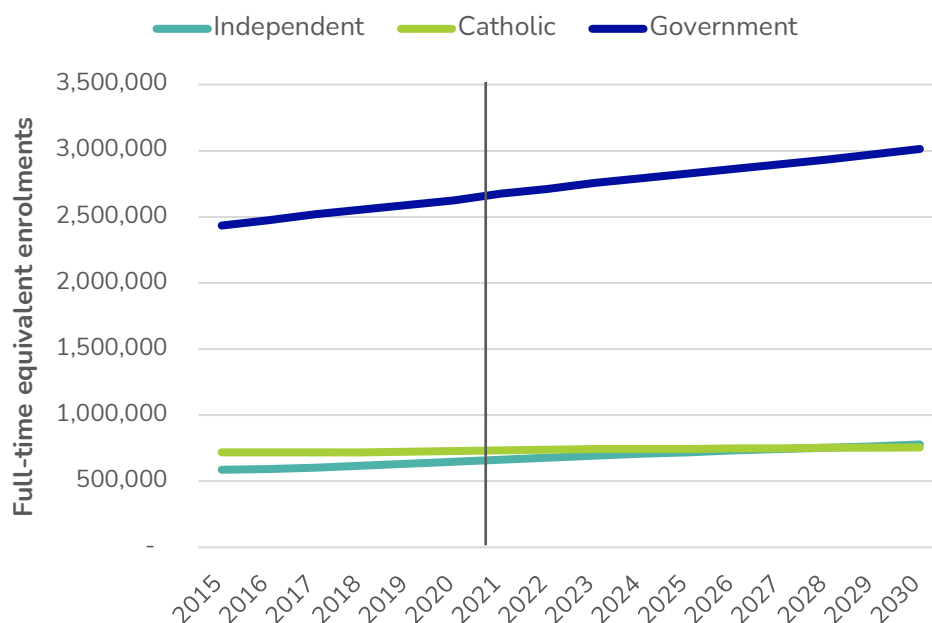
ISA projections show that up to 2030, overall school enrolments could increase by 1.3% per year with the Independent sector growing by 1.9% per year, the government sector by 1.4% and the Catholic sector 0.3% per year. These figures suggest that Independent schools are likely to continue their steady growth and could enrol approximately 131,000 students over the next 10 years. This is the equivalent of 242⁵ new schools, based on an average school size of 542⁶ students.

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

ISA has projected that the Independent sector will have enrolled more students than the Catholic sector around 2028, while the government sector will continue to increase its enrolment share at a steady rate.

ENROLMENT PROJECTIONS

2021 - 2030



AVERAGE ANNUAL ENROLMENT GROWTH

	ACTUAL 2015-2020	PROJECTED 2020-2025	PROJECTED 2025-2030	PROJECTED 2020-2030
INDEPENDENT	2.0%	2.1%	1.6%	1.9%
CATHOLIC	0.3%	0.4%	0.3%	0.3%
GOVERNMENT	1.5%	1.5%	1.3%	1.4%
ALL SECTORS	1.4%	1.4%	1.2%	1.3%

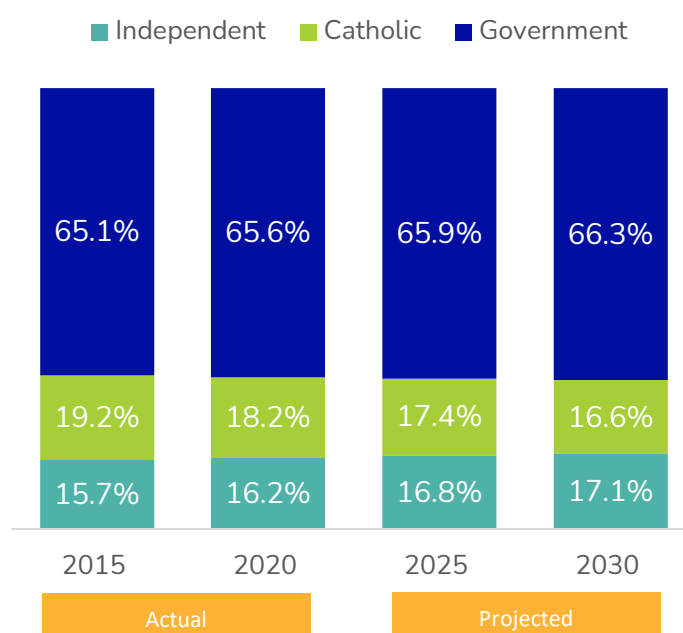
⁵ Assumes all current Independent schools at capacity.

⁶ Average enrolment size of an Independent school in 2020, based on ABS Schools Australia data.

PERCENTAGE POINT CHANGE IN STUDENT SHARE

	ACTUAL 2015-2020	PROJECTED 2020-2025	PROJECTED 2025-2030	PROJECTED 2020-2030
INDEPENDENT	+0.5	+0.6	+0.4	+0.9
CATHOLIC	-1.0	-0.9	-0.8	-1.6
GOVERNMENT	+0.5	+0.3	+0.4	+0.7

SECTOR SHARE 2015, 2020
PROJECTED SECTOR SHARE 2025, 2030



The largest increase in enrolment share by 2030 is projected to be in the NT and ACT government sectors, with enrolment shares to increase from 74.5% to 80.1% and 61.4% to 64.6% respectively.

The largest decline in enrolment share by 2030 is projected to be in the NT Independent sector and ACT Catholic sector, with enrolment shares to decrease from 13.8% to 9.3% and 19.4% to 17.3% respectively.

CHANGE IN ENROLMENT SHARE FROM 2020 TO 2030

		INDEPENDENT	CATHOLIC	GOVERNMENT
AUSTRALIA	2020 (Current)	16.2%	18.2%	65.6%
	2030 (Projected)	17.1%	16.6%	66.3%
	Change	+0.9	-1.6	+0.7
NSW	2020 (Current)	17.2%	17.6%	65.3%
	2030 (Projected)	18.2%	15.7%	66.1%
	Change	+1.0	-1.9	+0.9
VIC	2020 (Current)	15.1%	21.0%	64.0%
	2030 (Projected)	16.2%	18.5%	65.3%
	Change	+1.1	-2.4	+1.3
QLD	2020 (Current)	15.2%	17.9%	66.9%
	2030 (Projected)	16.6%	17.4%	66.0%
	Change	+1.4	-0.5	-0.9
SA	2020 (Current)	19.8%	15.6%	64.6%
	2030 (Projected)	21.2%	14.5%	64.3%
	Change	+1.4	-1.1	-0.3
WA	2020 (Current)	16.1%	16.5%	67.5%
	2030 (Projected)	16.0%	14.6%	69.4%
	Change	-0.1	-1.8	+1.9
TAS	2020 (Current)	12.2%	18.4%	69.4%
	2030 (Projected)	14.3%	17.6%	68.0%
	Change	+2.1	-0.8	-1.4
NT	2020 (Current)	13.8%	11.8%	74.5%
	2030 (Projected)	9.3%	10.6%	80.1%
	Change	-4.4	-1.2	+5.6
ACT	2020 (Current)	19.1%	19.4%	61.4%
	2030 (Projected)	18.3%	17.3%	64.4%
	Change	-0.8	-2.1	+2.9

ADDITIONAL ENROLMENTS PROJECTED TO 2030

SECTOR	CURRENT ENROLMENTS 2020	PROJECTED ENROLMENTS 2025	PROJECTED ENROLMENTS 2030	ADDITIONAL ENROLMENTS 2020-2025	ADDITIONAL ENROLMENTS 2025-2030	ADDITIONAL ENROLMENTS 2020-2030
INDEPENDENT	647,371	719,688	778,390	+72,317	+58,702	+131,019
CATHOLIC	729,817	745,580	755,655	+15,762	+10,075	+25,837
GOVERNMENT	2,624,698	2,826,637	3,012,701	+201,939	+186,064	+388,003
ALL SECTORS	4,001,887	4,291,905	4,546,746	+290,019	+254,841	+544,859