ENROLMENT TRENDS: INDEPENDENT SCHOOL SECTOR DEEP DIVE

ISA RESEARCH REPORT

2022 EDITION

INDEPENDENT SCHOOLS AUSTRALIA

INTRODUCTION 1

1.1 PURPOSE

Independent Schools Australia (ISA) regularly undertakes in-depth analysis of schools in Australia, including enrolment trends and projections by school sector. For this report, ISA has used school-level data from Independent schools to conduct a deep dive analysis into key characteristics of Independent schools, enrolment trends over the past five years, and the type of schools experiencing growth. The purpose of this research is to provide credible information that will inform policy makers.

1.2 ANALYSIS NOTES

Data sources

All historical charts and tables presented in the body of this document are drawn from an in-depth analysis of the Australian Government Department of Education (DoE) Non-Government Schools Census and Australian Curriculum, Assessment and Reporting Authority (ACARA) My School datasets.

Sector classification

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.

For the purposes of this research report, ISA has classified independent Catholic schools as part of the Independent school sector.

Data inconsistencies / changes

In 2021 there were three independent Catholic schools in South Australia which became systemic Catholic schools.

The Independent school sector's enrolment growth from 2020 to 2021 is 3.1% or an additional 19,888 full-time equivalent (FTE) students. For the purposes of this analysis, the three independent Catholic schools from South Australia have been removed from prior years to provide meaningful growth comparisons. This has changed, for this report only, the Independent school sector's enrolment growth from 2020 to 2021 to 3.4% or an additional 21,881 FTE enrolments.

KEY FINDINGS 2

The key findings include independent (non-systemic) Catholic schools in the Independent sector.

— There are currently 4 million full-time equivalent (FTE) 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%).

— Independent schools are diverse, in terms of the communities and students they serve, size, location and nature. Across the Independent sector's 1,187 schools, there are more than 20 categories of teaching philosophy and religious affiliation. Within these groupings schools have varying fee levels including community schools for Aboriginal and Torres Strait Islander students in remote areas, specialist schools for young people at risk, boarding schools, and large and small multicultural schools in cities and regional areas. See the ISA Snapshot for more information.

— The Independent sector is currently experiencing its strongest student growth in more than a decade and highest enrolment share. See the ISA Research Report: Enrolment Trends and Projections for more information.

— Over the past five years, New South Wales Independent schools enrolled the largest number of additional students (+25,098) while Queensland Independent schools recorded the highest average annual growth rate (3.0% per year on average). Queensland Independent schools currently enrol 20% of all Independent students and account for 25% of all additional students enrolled over the last five years.

— In 2021, the Independent sector experienced enrolment growth across every state and territory, with New South Wales enrolling the most additional students (+7,511) and Queensland recording the highest growth rate (4.5%).

— Enrolment growth within the Independent sector has been strong in both metro and regional areas. Most recently, regional areas have generally experienced higher growth than metro areas.

— Over the last five years, 31% of all additional Independent school enrolments have been in schools outside capital cities. This varies from 20% in Victoria to 50% in Queensland.

— Over the last five years, seven out of ten additional Independent school enrolments have been in Christian, Non-Denominational, Anglican and Islamic schools.

— Over the last five years, enrolments in Special Assistance Schools have grown by 18% per year on average.

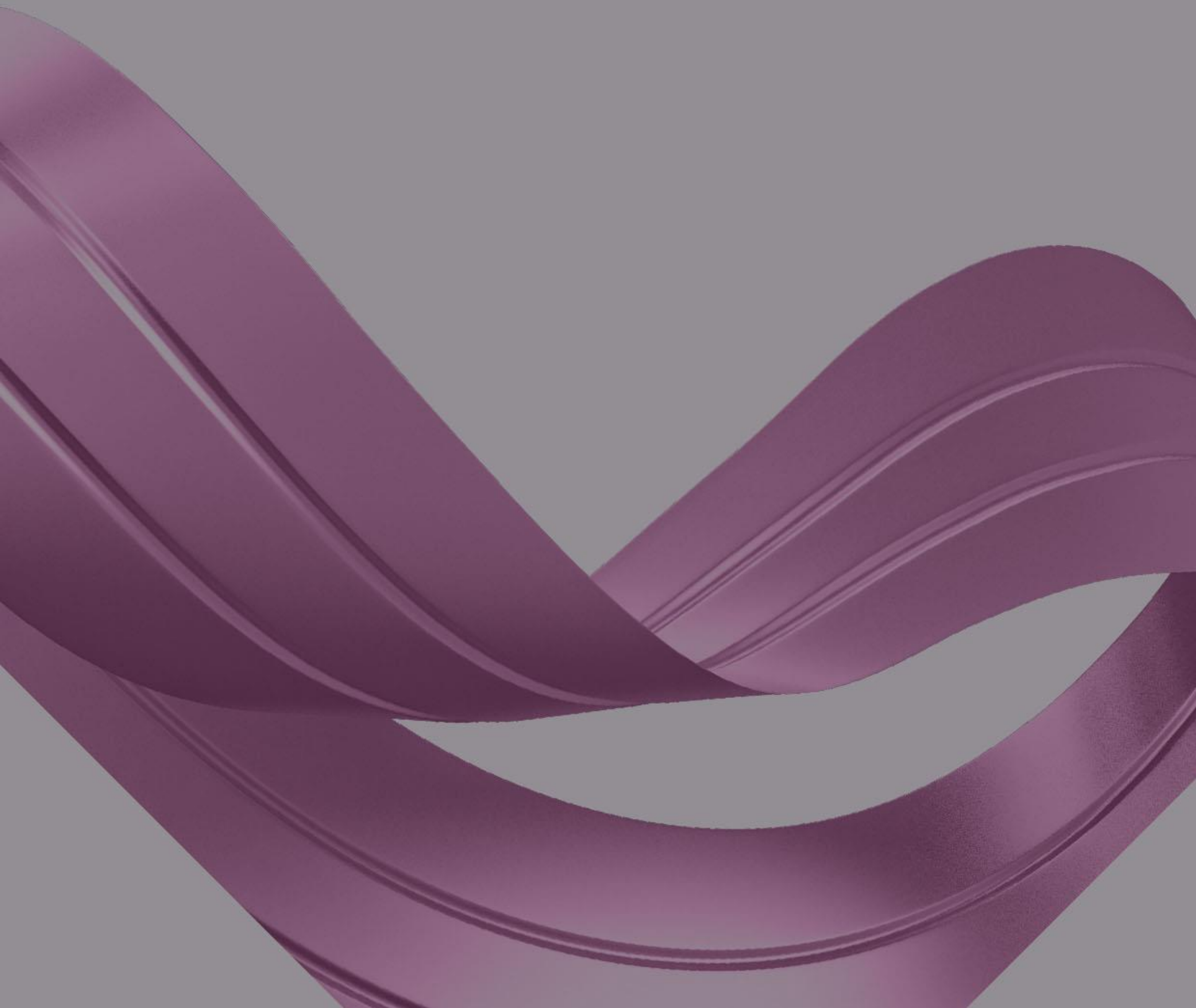
— Over the last five years, boarding school enrolments have remained steady. For more information see ISA's Independent boarding school research.

— Over the last five years, eight out of ten additional Independent school enrolments have been in schools charging annual fees of $7,500 or less on average.

— While historically growth in Independent school enrolments has occurred primarily in years 5 to 9, current data suggests that more recently parents are becoming less likely to wait before enrolling children in the Independent sector. Most year levels experienced above average growth within the last year.

— Only 3 in 4 low-fee Independent schools have increased in enrolments over the past five years - while affordability is a minor predictor of growth, it is only one of multiple factors.

INDEPENDENT SCHOOL SECTOR OVERVIEW



OVERVIEW – ALL SECTORS 3

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

New South Wales enrols 31% of all Australian students, while the Northern Territory enrols 1%.

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

FIGURE 3.1 TOTAL SCHOOL ENROLMENTS IN AUSTRALIA, 2021

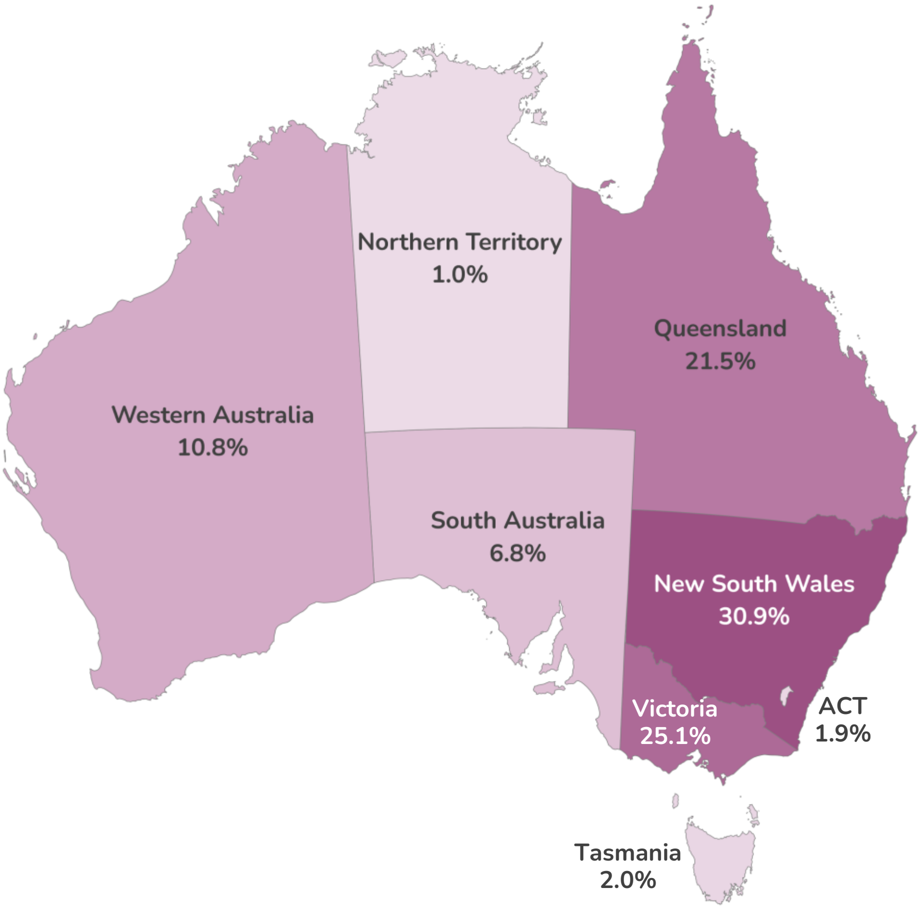


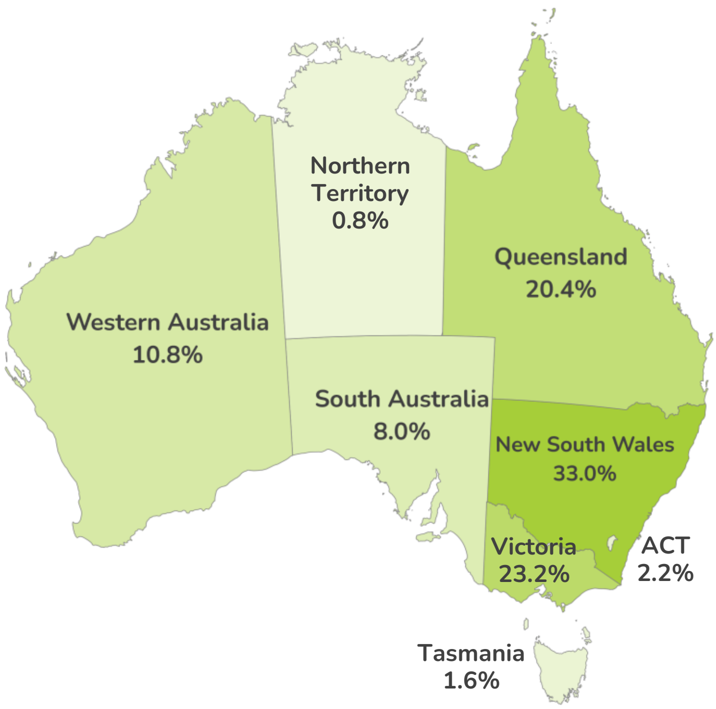
TABLE 3.1 ENROLMENTS BY STATE/TERRITORY AND SECTOR

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%**	

*Data excludes for-profit Independent schools, which are not included in ABS dataset due to the data collection method. This includes 1,313 enrolments in NSW Independent schools in 2020 and 1,339 in 2021.

33% of all Independent sector students are in New South Wales, followed by 23% in Victoria and 20% in Queensland.

FIGURE 3.2 PROPORTION OF INDEPENDENT SCHOOL ENROLMENTS BY STATE / TERRITORY, 2021



DIVERSITY WITHIN THE INDEPENDENT SECTOR 4

Independent schools are diverse, in terms of the communities and students they serve, size, location and nature. This diversity has long been considered a major strength of the Australian schooling system, serving the needs of a geographically dispersed, multicultural and multi-faith population.

Ranging from community schools for Aboriginal and Torres Strait Islander students in remote areas, specialist education settings for young people at risk and students with disability, boarding schools to educate students from regional and remote locations to large and small multicultural schools in cities and regional areas, Independent schooling provides a variety of options to meet the needs of families.

The following tables demonstrate the diversity of the Independent sector, with key statistics shown by state/territory, remoteness, Greater Capital City Statistical Area (GCCSA), and affiliation.

TABLE 4.1 INDEPENDENT SECTOR OVERVIEW BY STATE

	STUDENTS IN 2021	SCHOOLS IN 2021	AVERAGE ENROLMENTS PER SCHOOL	MEDIAN PARENT FEES IN 2020	STUDENT-WEIGHTED CAPACITY TO CONTRIBUTE SCORE[1]	CTC-EXEMPT[2] SCHOOLS IN 2021
NSW[3]	220,405	407	542	$5,133	109	63
VIC	154,690	223	694	$6,169	106	26
QLD	136,227	228	597	$4,791	103	39
WA	71,893	148	486	$3,955	106	25
SA	53,531	107	500	$5,092	101	6
ACT	14,487	18	805	$8,601	117	1
TAS	10,410	35	297	$2,639	100	4
NT	5,616	21	267	$3,610	108	8
TOTAL	**667,259**	**1,187**	**562**	**$5,025**	**106**	**172**

[1] Capacity to contribute (CTC) is a measure of a non-government school community's capacity to contribute to the ongoing costs of running the school. A school's CTC percentage affects the amount of base recurrent funding the school attracts from the Commonwealth.

Special schools, Majority Aboriginal and Torres Strait Islander Schools (MATSIS), Special Assistance Schools (SAS) and remote sole provider schools are exempt from capacity to contribute and not assigned a score. This can cause anomalies when looking at averages. For example, NT student-weighted average CTC score of 108 excludes eight of their most disadvantaged schools.

For more information see https://www.dese.gov.au/quality-schools-package/capacity-contribute-scores-non-government-schools. CTC scores used in this analysis are the latest scores available at the time of publishing this report, 2022 scores.

[2] As noted above, special, MATSIS, SAS and remote sole provider schools are CTC-exempt.

[3] Data excludes for-profit Independent schools, which are not included in ABS dataset due to the data collection method. This includes 1,313 enrolments in NSW Independent schools in 2020 and 1,339 in 2021.

TABLE 4.2 INDEPENDENT SECTOR OVERVIEW BY REMOTENESS

	STUDENTS IN 2021	SCHOOLS IN 2021	AVERAGE ENROLMENTS PER SCHOOL	MEDIAN PARENT FEES IN 2020	STUDENT-WEIGHTED CAPACITY TO CONTRIBUTE SCORE	CTC-EXEMPT SCHOOLS IN 2021
MAJOR CITIES	532,134	783	680	$6,541	108	106
INNER REGIONAL	103,547	263	394	$3,597	99	27
OUTER REGIONAL	27,680	104	266	$2,537	97	13
REMOTE	2,421	12	202	$3,540	100	4
VERY REMOTE	1,477	25	59	$13	103	22
TOTAL	**667,259**	**1,187**	**562**	**$5,025**	**106**	**172**

TABLE 4.3 INDEPENDENT SECTOR OVERVIEW BY GCCSA

	STUDENTS IN 2021	SCHOOLS IN 2021	AVERAGE ENROLMENTS PER SCHOOL	MEDIAN PARENT FEES IN 2020	STUDENT-WEIGHTED CAPACITY TO CONTRIBUTE SCORE	CTC-EXEMPT SCHOOLS IN 2021
GREATER SYDNEY	157,301	242	650	$7,240	113	36
GREATER MELBOURNE	123,906	160	774	$8,275	107	22
GREATER BRISBANE	67,471	101	668	$5,840	106	18
GREATER PERTH	62,778	107	587	$6,018	107	9
GREATER ADELAIDE	45,813	83	552	$4,817	102	5
ACT	14,487	18	805	$8,601	117	1
GREATER HOBART	5,750	17	338	$3,832	103	1
GREATER DARWIN	3,634	8	454	$4,671	110	-
REST OF NSW	63,104	165	382	$3,951	100	27
REST OF VIC	30,785	63	489	$3,757	102	4
REST OF QLD	68,756	127	541	$4,280	100	21
REST OF WA	9,115	41	222	$2,180	98	16
REST OF SA	7,718	24	322	$2,351	92	1
REST OF TAS	4,659	18	259	$2,416	96	3
REST OF NT	1,982	13	152	$3,266	104	8
TOTAL	**667,259**	**1,187**	**562**	**$5,025**	**106**	**172**

TABLE 4.4 INDEPENDENT SECTOR OVERVIEW BY AFFILIATION*

	STUDENTS IN 2021	SCHOOLS IN 2021	AVERAGE ENROLMENTS PER SCHOOL	STUDENT-WEIGHTED CAPACITY TO CONTRIBUTE SCORE	CTC-EXEMPT SCHOOLS IN 2021
ANGLICAN	162,876	154	1058	115	3
NON-DENOMINATIONAL	94,732	235	403	109	76
CHRISTIAN	81,482	159	512	96	19
UNITING CHURCH	52,105	44	1184	120	3
ISLAMIC	43,906	49	896	82	-
CATHOLIC, ROMAN	43,170	52	830	115	10
LUTHERAN	42,479	80	531	101	2
BAPTIST	24,682	41	602	105	3
INTER-DENOMINATIONAL	18,018	23	783	107	2
OTHER	17,372	109	159	101	50
SEVENTH DAY ADVENTIST	15,454	44	351	95	-
PRESBYTERIAN	11,932	13	918	119	-
STEINER	9,720	50	194	94	1
JEWISH	9,319	19	490	115	-
PENTECOSTAL	8,755	20	438	98	-
ASSEMBLIES OF GOD	7,307	11	664	96	1
MONTESSORI	4,995	40	125	106	-
TOTAL	**667,259**	**1,187**	**562**	**106**	**172**

*Affiliations with less than 10 schools nationally have been omitted.

INDEPENDENT SECTOR GROWTH TRENDS

OVERVIEW 5

New South Wales, Victoria and Queensland currently account for 76% of all Independent school enrolments and also 87% of the growth in Independent school enrolments over the past five years.

Independent schools in all states and territories saw strong or higher than usual levels of growth[4] in 2021.

In 2021, New South Wales enrolled the most additional students (+7,511) while Queensland experienced the highest level of enrolment growth (4.5%).

Since 2016, New South Wales has enrolled the most additional students (+25,098) while Queensland experienced the highest level of enrolment growth (3.0% per year on average).

TABLE 5.1 INDEPENDENT SCHOOL ENROLMENTS BY STATE/TERRITORY, 2016 - 2021

	STUDENTS IN 2021	ADDITIONAL STUDENTS SINCE 2020	ADDITIONAL STUDENTS SINCE 2016	ANNUAL GROWTH (FROM 2020)	AVG ANNUAL GROWTH (FROM 2016)	PROPORTION OF STUDENTS 2021	PROPORTION OF ADDITIONAL STUDENTS SINCE 2016
NSW[5]	220,405	+7,511	+25,098	3.5%	2.4%	33%	34%
VIC	154,690	+3,435	+19,714	2.3%	2.8%	23%	26%
QLD	136,227	+5,863	+18,648	4.5%	3.0%	20%	25%
WA	71,893	+2,888	+5,629	4.2%	1.6%	11%	8%
SA	53,531	+1,429	+4,417	2.7%	1.7%	8%	6%
TAS	10,410	+440	+1,226	4.4%	2.5%	2%	2%
ACT	14,487	+303	+996	2.1%	1.4%	2%	1%
NT	5,616	+13	-837	0.2%	-2.7%	1%	-1%
TOTAL	**667,259**	**+21,881**	**+74,890**	**3.4%**	**2.4%**	**100%**	**100%**

[4] In 2021, three South Australian independent Catholic schools became systemic Catholic schools. This resulted in a decrease in SA Independent school enrolments from 2020. Excluding these three schools from the Independent sector in 2021 and 2020 results in a growth rate of 3.0%.

[5] Data excludes for-profit Independent schools, which are not included in ABS dataset due to the data collection method. This includes 1,313 enrolments in NSW Independent schools in 2020 and 1,339 in 2021.

FIGURE 5.1 PROPORTION OF INDEPENDENT SCHOOL ENROLMENTS IN 2021, PROPORTION OF ADDITIONAL ENROLMENTS 2016 - 2021

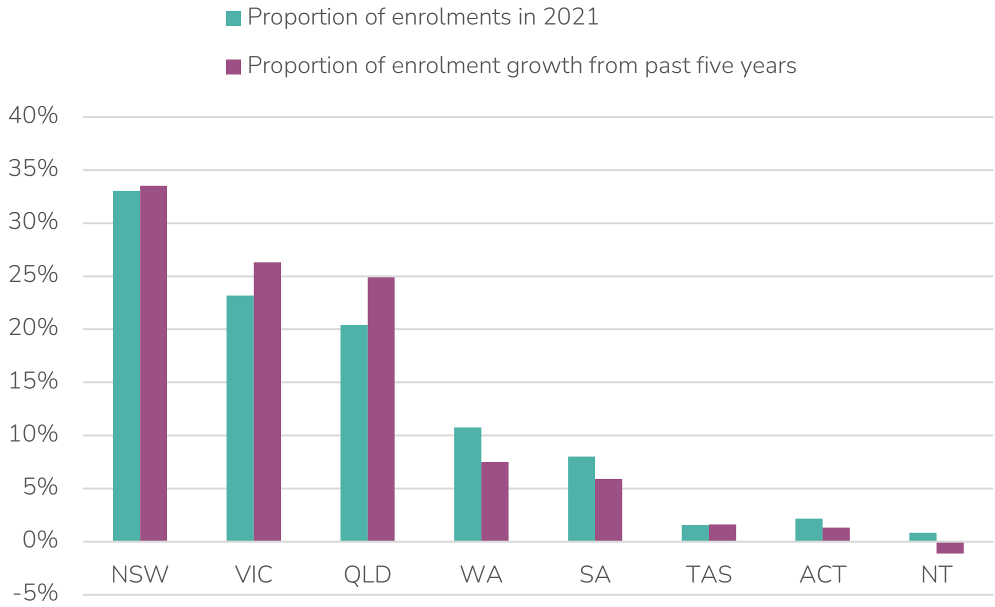


FIGURE 5.2 ADDITIONAL INDEPENDENT SCHOOL ENROLMENTS, 2016 - 2021

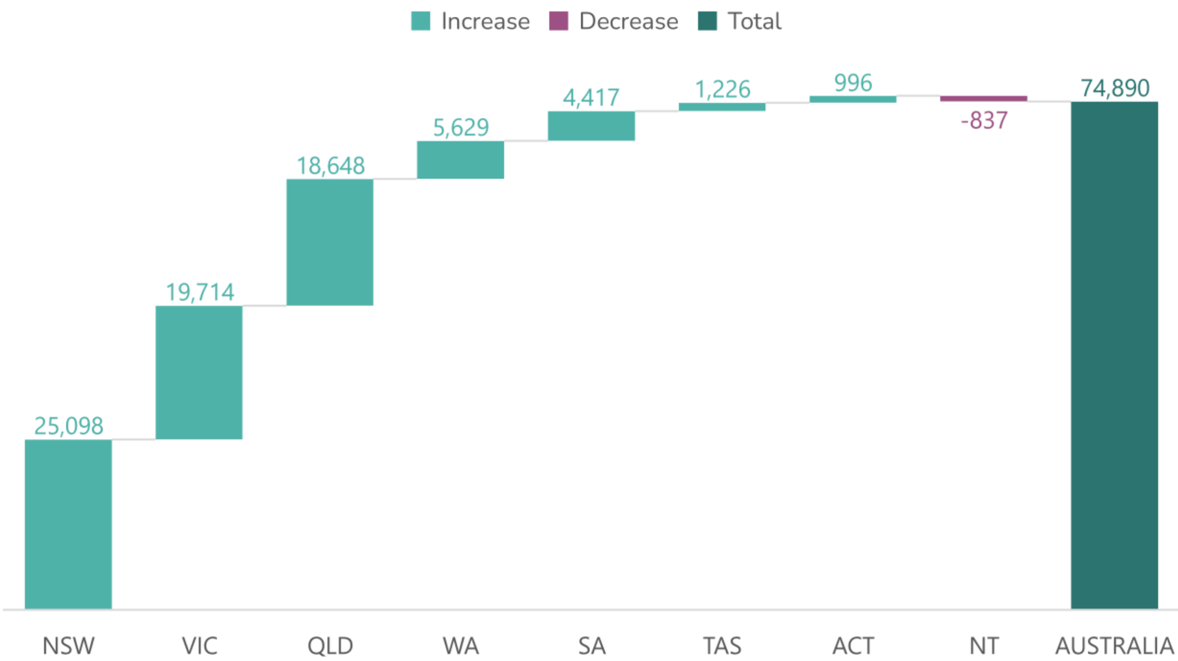


FIGURE 5.3 INDEPENDENT SCHOOL ENROLMENT GROWTH BY STATE/TERRITORY

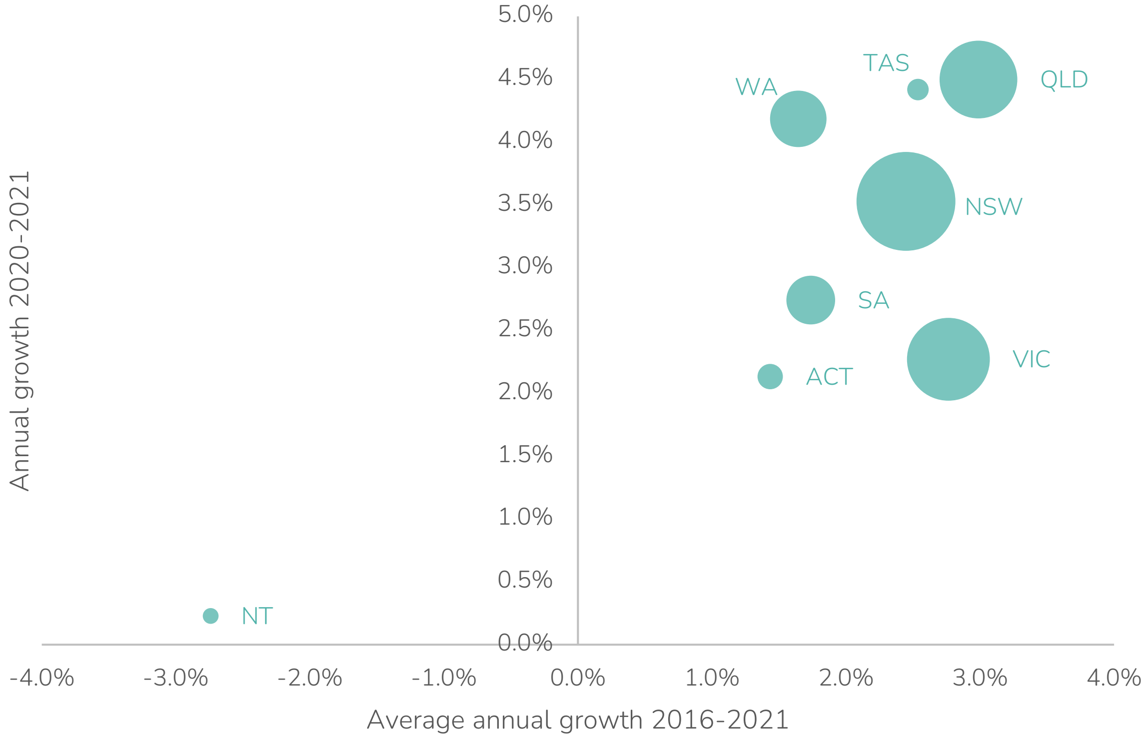
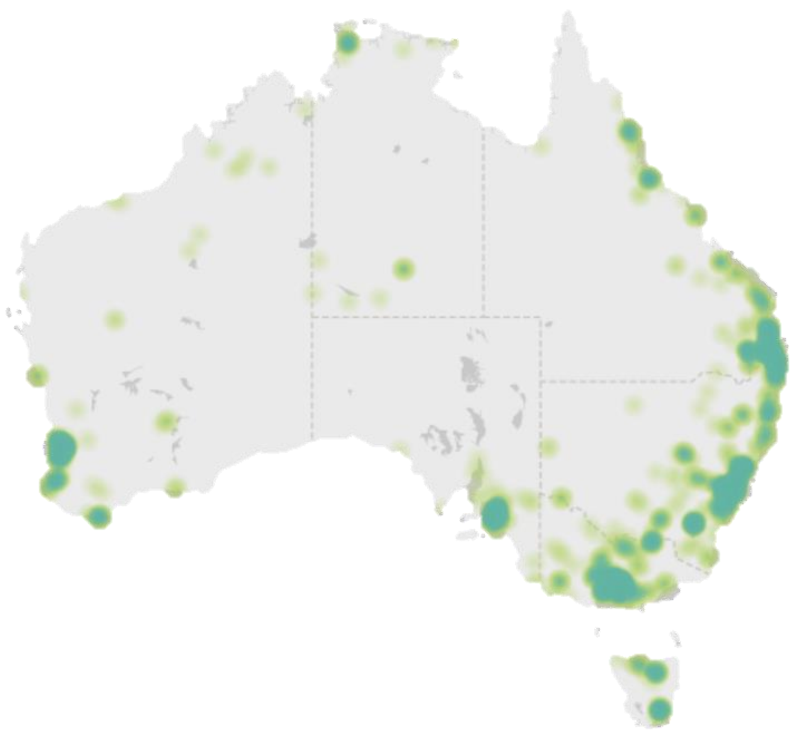


FIGURE 5.4 HEAT MAP OF ADDITIONAL INDEPENDENT SCHOOL ENROLMENTS, 2021



LOCATION 6

6.1 REMOTENESS

Growth in Independent school enrolments has been strong across both major cities and regional areas, with regional growth outpacing growth in major cities. Regional Australia currently accounts for 20% of all Independent school enrolments, yet accounts for 22% of the growth in enrolments over the past five years. Growth in remote Australia has stagnated in recent years, with these areas accounting for less than 1% of all Independent school enrolments.

TABLE 6.1 INDEPENDENT SCHOOL ENROLMENTS BY REMOTENESS[6], 2016 - 2021

	STUDENTS IN 2021	ADDITIONAL STUDENTS SINCE 2020	ADDITIONAL STUDENTS SINCE 2016	ANNUAL GROWTH (FROM 2020)	AVG ANNUAL GROWTH (FROM 2016)	PROPORTION OF STUDENTS 2021	PROPORTION OF ADDITIONAL STUDENTS SINCE 2016
MAJOR CITIES	532,134	+16,271	+59,302	3.2%	2.4%	80%	79%
INNER REGIONAL	103,547	+4,164	+13,367	4.2%	2.8%	16%	18%
OUTER REGIONAL	27,680	+1,483	+2,593	5.7%	2.0%	4%	3%
REMOTE	2,421	-54	-364	-2.2%	-2.8%	0%	0%
VERY REMOTE	1,477	+17	-8	1.2%	-0.1%	0%	0%
TOTAL	**667,259**	**+21,881**	**+74,890**	**3.4%**	**2.4%**	**100%**	**100%**

[6] Remoteness is based on the Australian Bureau of Statistic's remoteness structure https://www.abs.gov.au/websitedbs/d3310114.nsf/home/remoteness+structure

FIGURE 6.1 INDEPENDENT SCHOOL ENROLMENT GROWTH BY REMOTENESS

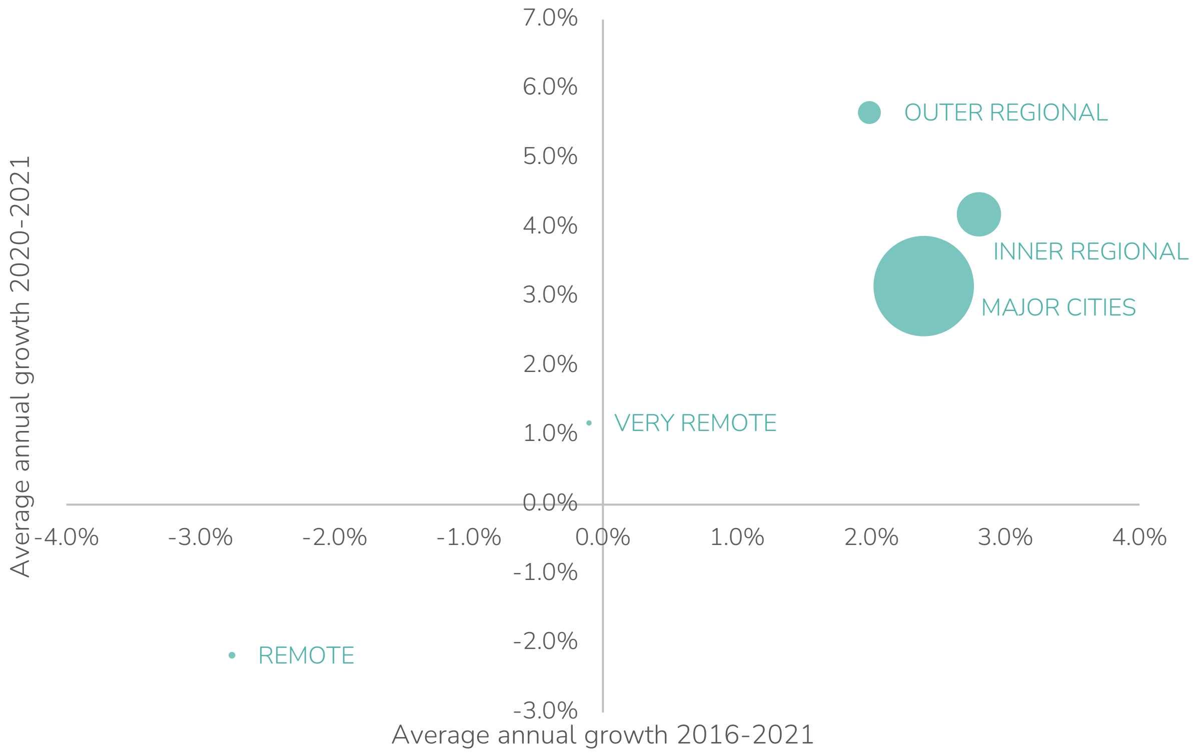
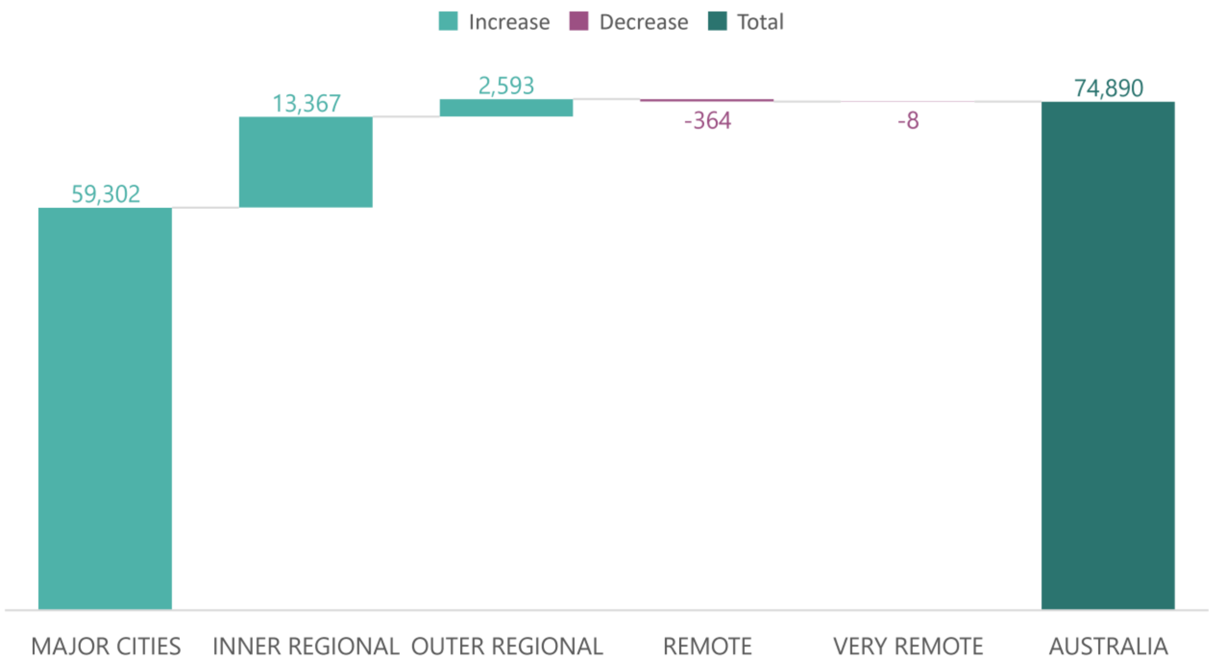
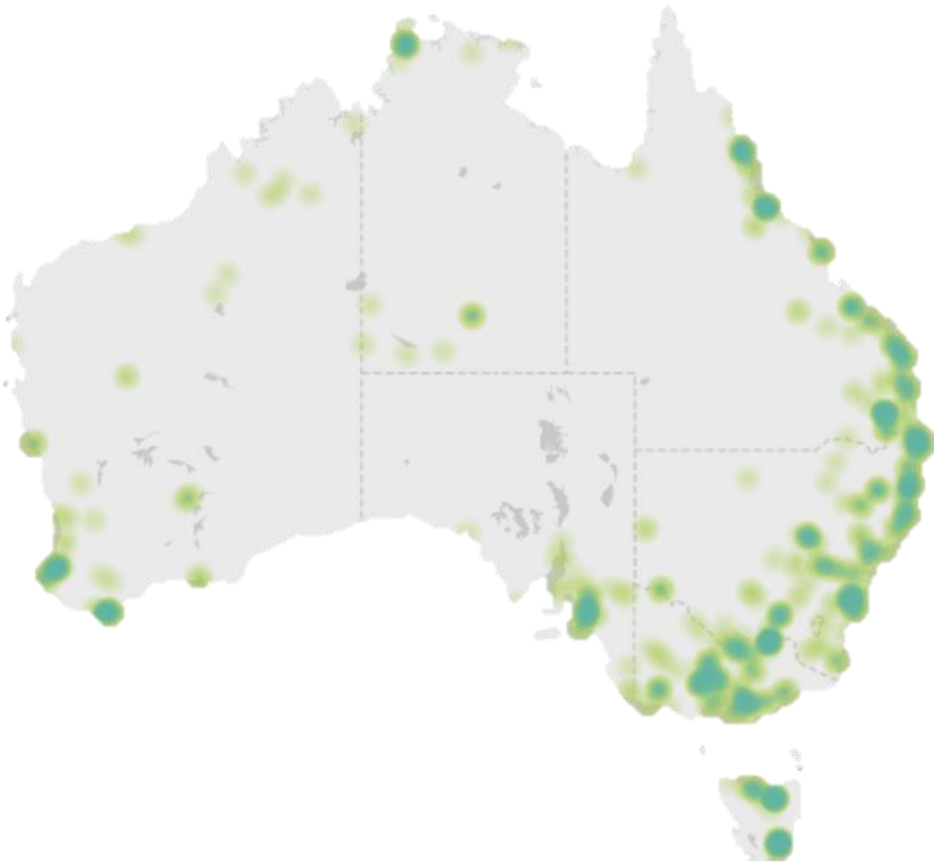


FIGURE 6.2 ADDITIONAL INDEPENDENT SCHOOL ENROLMENTS, 2016 - 2021 BY REMOTENESS



The map below highlights enrolment growth in regional and remote areas only, showing that growth in Independent school enrolments has occurred across regional areas in every state and territory.

FIGURE 6.3 HEAT MAP OF ADDITIONAL INDEPENDENT SCHOOL ENROLMENTS – REGIONAL AND REMOTE ONLY, 2016 - 2021



The table below shows Independent school enrolments by state/territory and remoteness, ranked by additional enrolments since 2016.

Unsurprisingly, most of the additional enrolments occur within major cities. New South Wales major cities (Sydney, Wollongong, Blue Mountains, Gosford, Newcastle, Tweed Heads) have enrolled the most additional students (+5,357 since 2020, +19,422 since 2016). However inner regional areas generally have higher growth rates than their major city counterparts.

TABLE 6.2 INDEPENDENT SCHOOL ENROLMENTS BY REMOTENESS AND STATE/TERRITORY, 2016 - 2021

	STUDENTS IN 2021	ADDITIONAL STUDENTS SINCE 2020	ADDITIONAL STUDENTS SINCE 2016	ANNUAL GROWTH (FROM 2020)	AVG ANNUAL GROWTH (FROM 2016)	PROPORTION OF STUDENTS 2021	PROPORTION OF ADDITIONAL STUDENTS SINCE 2016
NSW-MAJOR CITIES	**179,622**	**+5,357**	**+19,422**	**3.1%**	**2.3%**	**27%**	**26%**
VIC-MAJOR CITIES	**131,535**	**+2,868**	**+16,444**	**2.2%**	**2.7%**	**20%**	**22%**
QLD-MAJOR CITIES	**100,863**	**+4,209**	**+14,249**	**4.4%**	**3.1%**	**15%**	**19%**
NSW-INNER REGIONAL	37,298	+1,778	+4,855	5.0%	2.8%	6%	6%
WA-MAJOR CITIES	**62,073**	**+2,331**	**+4,179**	**3.9%**	**1.4%**	**9%**	**6%**
SA-MAJOR CITIES	**43,554**	**+1,204**	**+4,013**	**2.8%**	**2.0%**	**7%**	**5%**
QLD-INNER REGIONAL	24,212	+1,013	+3,530	4.4%	3.2%	4%	5%
VIC-INNER REGIONAL	20,339	+446	+2,781	2.2%	3.0%	3%	4%
TAS-INNER REGIONAL	**9,053**	**+350**	**+1,060**	**4.0%**	**2.5%**	**1%**	**1%**
WA-INNER REGIONAL	4,960	+413	+1,023	9.1%	4.7%	1%	1%
ACT-MAJOR CITIES	**14,487**	**+303**	**+996**	**2.1%**	**1.4%**	**2%**	**1%**
QLD-OUTER REGIONAL	10,843	+644	+823	6.3%	1.6%	2%	1%
NSW-OUTER REGIONAL	3,465	+373	+813	12.1%	5.5%	1%	1%
WA-OUTER REGIONAL	3,863	+135	+540	3.6%	3.1%	1%	1%
VIC-OUTER REGIONAL	2,817	+121	+489	4.5%	3.9%	0%	1%
SA-OUTER REGIONAL	1,702	+71	+262	4.3%	3.4%	0%	0%
TAS-OUTER REGIONAL	1,357	+91	+166	7.2%	2.6%	0%	0%
SA-INNER REGIONAL	7,685	+164	+118	2.2%	0.3%	1%	0%
SA-VERY REMOTE	135	+8	+37	5.9%	6.6%	0%	0%
QLD-VERY REMOTE	112	+2	+30	1.8%	6.4%	0%	0%
QLD-REMOTE	198	-5	+16	-2.7%	1.7%	0%	0%
NT-VERY REMOTE	565	+5	+16	0.9%	0.6%	0%	0%
NSW-VERY REMOTE	20	+3	+8	17.6%	10.8%	0%	0%
SA-REMOTE	454	-17	-13	-3.7%	-0.6%	0%	0%
WA-REMOTE	352	+9	-16	2.6%	-0.9%	0%	0%
WA-VERY REMOTE	645	-1	-98	-0.1%	-2.8%	0%	0%
NT-REMOTE	1,417	-40	-351	-2.7%	-4.3%	0%	0%
NT-OUTER REGIONAL	**3,634**	**+48**	**-501**	**1.3%**	**-2.5%**	**1%**	**-1%**
TOTAL	**667,259**	**+21,881**	**+74,890**	**3.4%**	**2.4%**	**100%**	**100%**

6.2 GREATER CAPITAL CITY STATISTICAL AREA (GCCSA)

Independent schools in capital cities enrol 72% of all Independent school students, however they account for only 69% of additional enrolments over the past five years. Notably, more than half of all additional enrolments in Queensland have been from areas outside Brisbane.

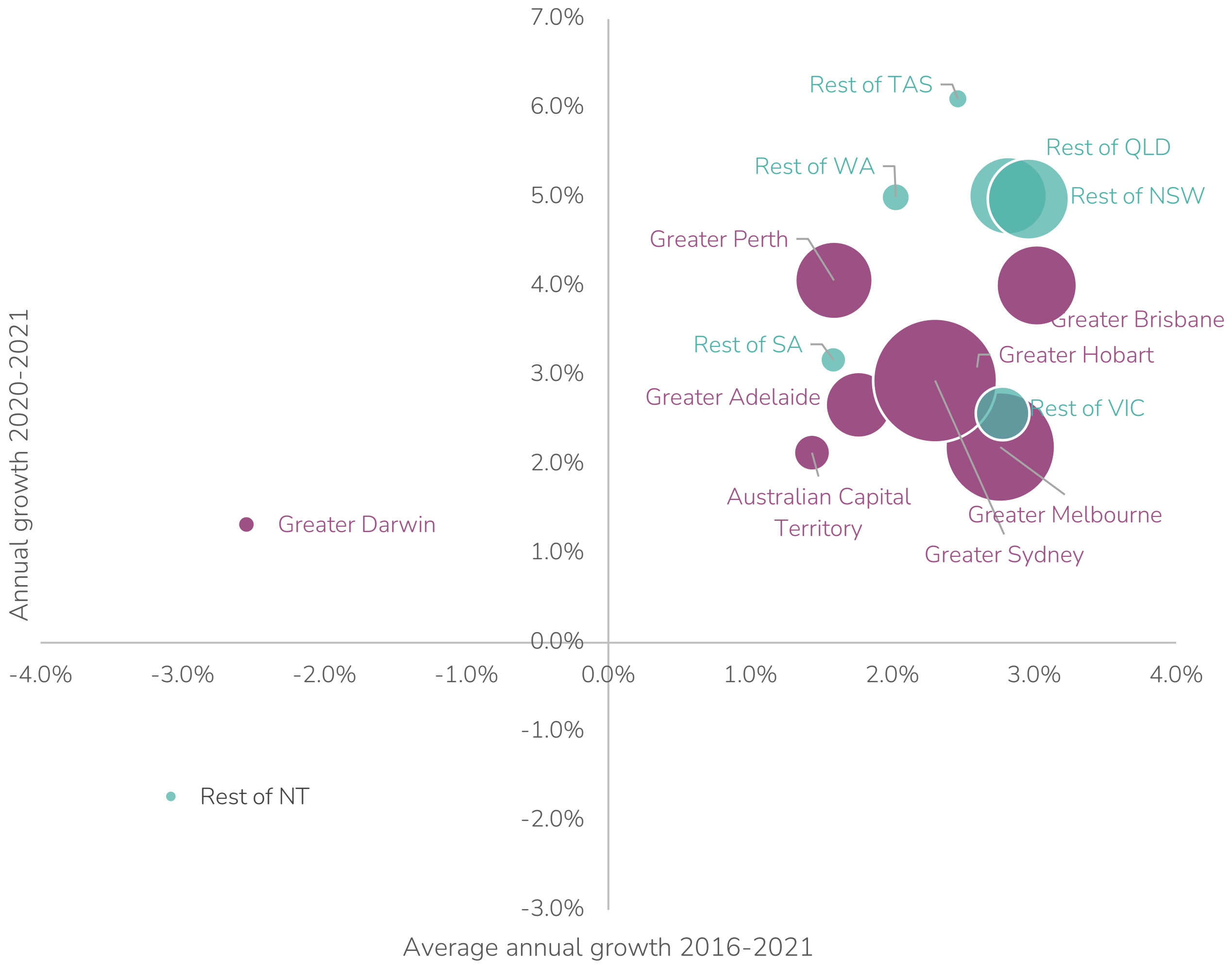
TABLE 6.3 INDEPENDENT SCHOOL ENROLMENTS BY GCCSA, 2016 - 2021

	STUDENTS IN 2021	ADDITIONAL STUDENTS SINCE 2020	ADDITIONAL STUDENTS SINCE 2016	ANNUAL GROWTH (FROM 2020)	AVG ANNUAL GROWTH (FROM 2016)	PROPORTION OF STUDENTS 2021	PROPORTION OF ADDITIONAL STUDENTS SINCE 2016
GREATER SYDNEY	**157,301**	**+4,496**	**+16,917**	**2.9%**	**2.3%**	**24%**	**23%**
GREATER MELBOURNE	**123,906**	**+2,663**	**+15,773**	**2.2%**	**2.8%**	**19%**	**21%**
REST OF QLD	68,756	+3,261	+9,328	5.0%	3.0%	10%	12%
GREATER BRISBANE	**67,471**	**+2,601**	**+9,320**	**4.0%**	**3.0%**	**10%**	**12%**
REST OF NSW	63,104	+3,014	+8,181	5.0%	2.8%	9%	11%
GREATER PERTH	**62,778**	**+2,453**	**+4,759**	**4.1%**	**1.6%**	**9%**	**6%**
REST OF VIC	30,785	+773	+3,941	2.6%	2.8%	5%	5%
GREATER ADELAIDE	**45,813**	**+1,191**	**+3,833**	**2.7%**	**1.8%**	**7%**	**5%**
ACT	**14,487**	**+303**	**+996**	**2.1%**	**1.4%**	**2%**	**1%**
REST OF WA	9,115	+434	+869	5.0%	2.0%	1%	1%
GREATER HOBART	**5,750**	**+172**	**+692**	**3.1%**	**2.6%**	**1%**	**1%**
REST OF SA	7,718	+237	+583	3.2%	1.6%	1%	1%
REST OF TAS	4,659	+268	+534	6.1%	2.5%	1%	1%
REST OF NT	1,982	-35	-336	-1.7%	-3.1%	0%	0%
GREATER DARWIN	**3,634**	**+48**	**-501**	**1.3%**	**-2.5%**	**1%**	**-1%**
TOTAL	**667,259**	**+21,881**	**+74,890**	**3.4%**	**2.4%**	**100%**	**100%**

TABLE 6.4 INDEPENDENT SCHOOL ENROLMENTS BY GCCSA, 2016 - 2021

	STUDENTS IN 2021	ADDITIONAL STUDENTS SINCE 2020	ADDITIONAL STUDENTS SINCE 2016	ANNUAL GROWTH (FROM 2020)	AVG ANNUAL GROWTH (FROM 2016)	PROPORTION OF STUDENTS 2021	PROPORTION OF ADDITIONAL STUDENTS SINCE 2016
CAPITAL CITIES	481,139	+13,928	+51,790	3.0%	2.3%	72%	69%
OUTSIDE CAPITAL CITIES	186,120	+7,953	+23,100	4.5%	2.7%	28%	31%
TOTAL	**667,259**	**+21,881**	**+74,890**	**3.4%**	**2.4%**	**100%**	**12%**

FIGURE 6.4 ENROLMENT GROWTH BY GCCSA, 2016 - 2021



Since 2016, 69% of additional enrolments in Independent schools have been capital cities however this varies between states and territories. In Queensland, just under 50% of additional enrolments were in Brisbane, but in South Australia, 87% of additional enrolments were in Adelaide.

TABLE 6.5 PERCENTAGE OF ADDITIONAL INDEPENDENT SCHOOL ENROLMENTS SINCE 2016, BY GCCSA

	CAPITAL CITY	REST OF STATE/ TERRITORY
NSW	67%	33%
VIC	80%	20%
QLD	50%	50%
SA	87%	13%
WA	85%	15%
TAS	56%	44%
NT	60%	40%
ACT	100%	0%
TOTAL	**69%**	**31%**

6.3 LOCAL GOVERNMENT AREA (LGA)

LGA's with the most additional students over the past five years are primarily in New South Wales, Victoria and Queensland. The top that grew the most in terms of students are Brisbane (QLD), Gold Coast (QLD), Moreton Bay (QLD), Melton (VIC) and Camden (NSW).

TABLE 6.6 INDEPENDENT SCHOOL ENROLMENTS BY LOCAL GOVERNMENT AREA (LGA), 2016 – 2021
TOP 20 RANKED BY ADDITIONAL STUDENTS SINCE 2016

	STATE	SCHOOLS AND CAMPUSES IN 2021	STUDENTS IN 2021	ADDITIONAL STUDENTS SINCE 2020	ADDITIONAL STUDENTS SINCE 2016	ANNUAL GROWTH (FROM 2020)	AVG ANNUAL GROWTH (FROM 2016)
BRISBANE	QLD	54	31,628	+1,141	+4,874	3.7%	3.4%
GOLD COAST	QLD	27	23,499	+1,104	+3,551	4.9%	3.3%
MORETON BAY	QLD	26	12,280	+615	+2,327	5.3%	4.3%
MELTON	VIC	6	3,051	+475	+2,076	18.4%	25.6%
CAMDEN	NSW	6	4,838	+477	+1,997	10.9%	11.2%
WYNDHAM	VIC	7	8,109	+426	+1,956	5.5%	5.7%
SUNSHINE COAST	QLD	23	12,317	+874	+1,858	7.6%	3.3%
CASEY	VIC	15	8,811	+493	+1,537	5.9%	3.9%
BLACKTOWN	NSW	14	7,941	+479	+1,486	6.4%	4.2%
CANTERBURY-BANKSTOWN	NSW	20	12,304	+366	+1,479	3.1%	2.6%
WANNEROO	WA	14	6,942	+297	+1,403	4.5%	4.6%
IPSWICH	QLD	15	7,763	+267	+1,307	3.6%	3.8%
PLAYFORD	SA	8	3,813	+273	+1,277	7.7%	8.5%
MELBOURNE	VIC	10	1,403	+123	+1,259	9.6%	57.7%
HUME	VIC	12	7,176	+301	+1,258	4.4%	3.9%
KU-RING-GAI	NSW	19	13,353	+134	+1,245	1.0%	2.0%
WOLLONDILLY	NSW	11	5,564	+136	+1,186	2.5%	4.9%
PARRAMATTA	NSW	15	7,563	+226	+1,064	3.1%	3.1%
HILLS SHIRE	NSW	12	8,057	+446	+1,032	5.9%	2.8%
CENTRAL COAST	NSW	21	8,360	+359	+994	4.5%	2.6%

TABLE 6.7 INDEPENDENT SCHOOL ENROLMENTS BY LOCAL GOVERNMENT AREA (LGA), 2016 – 2021
EACH STATE AND TERRITORY'S LGA WITH THE MOST ADDITIONAL STUDENTS SINCE 2016

	STATE	SCHOOLS AND CAMPUSES IN 2021	STUDENTS IN 2021	ADDITIONAL STUDENTS SINCE 2020	ADDITIONAL STUDENTS SINCE 2016	ANNUAL GROWTH (FROM 2020)	AVG ANNUAL GROWTH (FROM 2016)
CAMDEN	NSW	6	4,838	+477	+1,997	10.9%	11.2%
MELTON	VIC	6	3,051	+475	+2,076	18.4%	25.6%
BRISBANE	QLD	54	31,628	+1,141	+4,874	4%	3%
PLAYFORD	SA	8	3,813	+273	+1,277	7.7%	8.5%
WANNEROO	WA	14	6,942	+297	+1,403	4.5%	4.6%
CLARENCE	TAS	4	724	+55	+287	8.1%	10.6%
EAST ARNHEM	NT	2	240	+58	+62	31.9%	6.2%

TYPES OF SCHOOLS 7

7.1 SCHOOL AFFILIATION

Independent schools have diverse teaching philosophies and religious affiliations. The top 5 school affiliations, ranked by share of Independent school enrolments, are Anglican (24%), non-denominational (14%), Christian (12%), Uniting Church (8%) and Islamic (7%).

The past five years has seen rapid growth in enrolments in Christian schools, non-denominational schools, Anglican schools, Islamic and Baptist schools. Of note;

- Christian schools comprise 12% of all Independent school enrolments but account for 20% of all additional enrolments since 2016.
- Islamic schools comprise 7% of all enrolments but account for 16% of all additional enrolments since 2016.
- Anglican schools comprise 24% of all enrolments but account for only 17% of all additional enrolments since 2016.
- Uniting Church schools comprise 8% of all enrolments but account for only 2% of all additional enrolments since 2016.

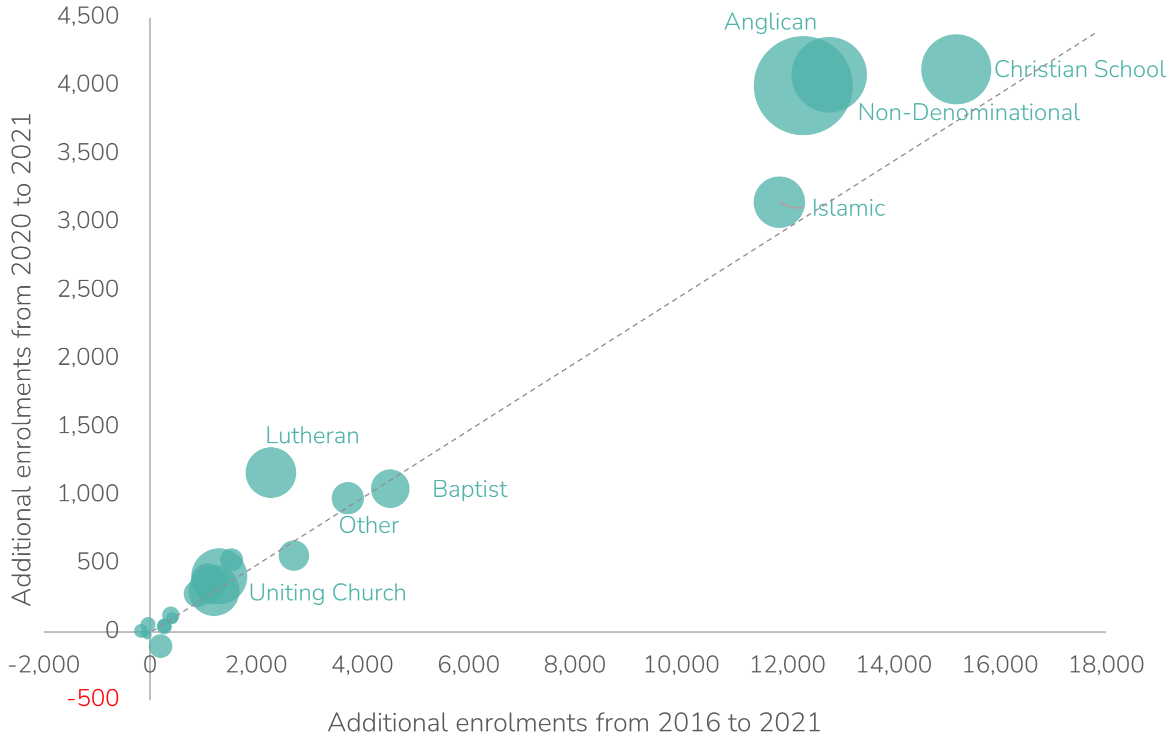
One common characteristic of the affiliations with high growth is low fees with Christian and Islamic school fees averaging below $5,000 per year. Anglican and Uniting Church school fees are comparatively higher with an average fee of $15,000 or more. However, it is not possible to conclude that fees are the sole driver of growth as there are many factors that potentially contribute, such as location, school capacity, reputation. See section 11 for more information.

TABLE 7.1 INDEPENDENT SCHOOL ENROLMENTS BY AFFILIATION, 2016 – 2021*

	STUDENTS IN 2021	ADDITIONAL STUDENTS SINCE 2016	ANNUAL GROWTH (FROM 2020)	AVG ANNUAL GROWTH (FROM 2016)	PROPORTION OF STUDENTS 2021	PROPORTION OF ADDITIONAL STUDENTS SINCE 2016
CHRISTIAN	81,482	+15,180	5.3%	4.2%	12%	20%
NON-DENOMINATIONAL	94,732	+12,787	4.5%	2.9%	14%	17%
ANGLICAN	162,876	+12,300	2.5%	1.6%	24%	16%
ISLAMIC	43,906	+11,850	7.7%	6.5%	7%	16%
BAPTIST	24,682	+4,523	4.4%	4.1%	4%	6%
OTHER	17,372	+3,725	6.0%	4.9%	3%	5%
SEVENTH DAY ADVENTIST	15,454	+2,709	3.8%	3.9%	2%	4%
LUTHERAN	42,479	+2,276	2.8%	1.1%	6%	3%
PENTECOSTAL	8,755	+1,537	6.4%	3.9%	1%	2%
UNITING CHURCH	52,105	+1,304	0.8%	0.5%	8%	2%
STEINER	9,720	+1,245	3.9%	2.8%	1%	2%
CATHOLIC, ROMAN	43,170	+1,206	0.7%	0.6%	6%	2%
ASSEMBLIES OF GOD	7,307	+1,108	4.0%	3.3%	1%	1%
INTER-DENOMINATIONAL	18,018	+1,083	2.2%	1.2%	3%	1%
PRESBYTERIAN	11,932	+887	2.4%	1.6%	2%	1%
MONTESSORI	4,995	+392	2.5%	1.6%	1%	1%
JEWISH	9,319	+198	-1.1%	0.4%	1%	0%
TOTAL	**667,259**	**+74,890**	**3.4%**	**2.4%**	**100%**	**100%**

*Affiliations with less than 10 schools nationally have been omitted.

FIGURE 7.1 INDEPENDENT SCHOOL ENROLMENT GROWTH BY AFFILIATION, 2016 -2021



The "OTHER" affiliation

The "Other" affiliation category is comprised primarily of non-religious community schools, international schools, Majority Aboriginal and Torres Strait Islander schools (MATSIS), Special or Special Assistance Schools (SAS).

Growth in this category is also high, with an average annual growth rate of 4.9% per year, well above the national Independent sector average of 2.3%. While growth is high across each "type" of school in this category, the growth rate is driven primarily by the Special, MATSIS and SAS schools (combined growth rate of 10.1% per year on average).

Only a small number of Special, MATSIS and SAS schools are included in the "Other" affiliation, most are included in "Non-Denominational" or their respective religious or philosophical affiliation. A comprehensive look at these schools is provided in the next section of this report.

TABLE 7.2 INDEPENDENT SCHOOL ENROLMENTS WITHIN THE "OTHER" AFFILIATION, 2016 - 2021

	STUDENTS IN 2021	ADDITIONAL STUDENTS SINCE 2020	ADDITIONAL STUDENTS SINCE 2016	ANNUAL GROWTH (FROM 2020)	AVG ANNUAL GROWTH (FROM 2016)	PROPORTION OF STUDENTS 2021	PROPORTION OF ADDITIONAL STUDENTS SINCE 2016
REGULAR	12,621	+484	+1,906	4.0%	3.3%	73%	51%
SPECIAL/SAS/MATSIS	4,751	+496	+1,819	11.6%	10.1%	27%	49%
TOTAL	**17,372**	**+980**	**+3,725**	**6.0%**	**4.9%**	**100%**	**100%**

7.2 MATSIS, SAS AND SPECIAL SCHOOLS

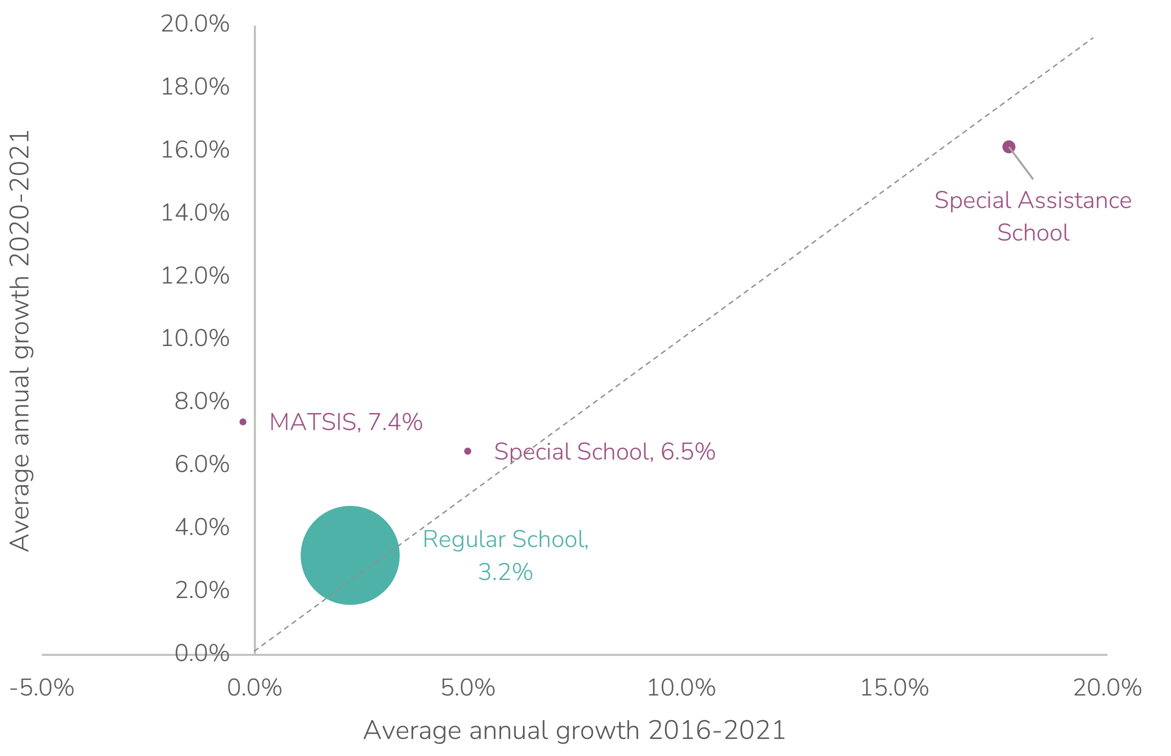
Special schools, MATSIS and SAS account for only 3% of all Independent school enrolments.

However, over the past five years these schools have accounted for nearly 10% of all additional enrolments in Independent schools. This is primarily driven by SAS schools, with average annual growth of 17.7% since 2016. Enrolment growth in MATSIS has remained relatively unchanged over the past five years.

TABLE 7.3 INDEPENDENT SCHOOL ENROLMENTS BY SCHOOL TYPE, 2016 - 2021

	STUDENTS IN 2021	ADDITIONAL STUDENTS SINCE 2020	ADDITIONAL STUDENTS SINCE 2016	ANNUAL GROWTH (FROM 2020)	AVG ANNUAL GROWTH (FROM 2016)	PROPORTION OF STUDENTS 2021	PROPORTION OF ADDITIONAL STUDENTS SINCE 2016
REGULAR SCHOOL	649,691	+19,914	+68,002	3.2%	2.2%	97%	91%
SPECIAL ASSISTANCE SCHOOL	11,169	+1,553	+6,222	16.1%	17.7%	2%	8%
SPECIAL SCHOOL	3,284	+200	+710	6.5%	5.0%	0%	1%
MATSIS	3,116	+215	-44	7.4%	-0.3%	0%	0%
TOTAL	**667,259**	**+21,881**	**+74,890**	**3.4%**	**2.4%**	**100%**	**100%**

FIGURE 7.2 ENROLMENT GROWTH IN INDEPENDENT SCHOOLS BY SCHOOL TYPE, 2016 - 2021



7.3 BOARDING SCHOOLS

Enrolment growth in schools with boarding facilities has remained stable over the past five years, with a growth rate of 0.5% per year compared to the non-boarding schools' growth rate of 2.9% per year.

Boarding schools accounted for 21% of all enrolments in Independent schools in 2021, yet account for only 5% of additional enrolments since 2016.

It is important to note that most boarding schools enrol both boarding and day students, with the majority being day students. For further analysis on Independent boarding schools, see ISA's boarding school research.

TABLE 7.4 INDEPENDENT SCHOOL ENROLMENTS BY BOARDING* / NON-BOARDING SCHOOL, 2016 - 2021

	STUDENTS IN 2021	ADDITIONAL STUDENTS SINCE 2020	ADDITIONAL STUDENTS SINCE 2016	ANNUAL GROWTH (FROM 2020)	AVG ANNUAL GROWTH (FROM 2016)	PROPORTION OF STUDENTS 2021	PROPORTION OF ADDITIONAL STUDENTS SINCE 2016
BOARDING	139,588	+1,338	+3,768	1.0%	0.5%	21%	5%
NON-BOARDING	527,671	+20,543	+71,121	4.1%	2.9%	79%	95%
TOTAL	**667,259**	**+21,881**	**+74,890**	**3.4%**	**2.4%**	**100%**	**100%**

*Most boarding schools enrol both boarding and day students.

FEES

8

Enrolment growth in Independent schools has occurred primarily in schools with annual fees of $7,500 or less, with higher growth generally being associated with lower fees.

Independent schools with average annual fees below $7,500 accounted for 49% of all Independent school enrolments, yet account for 77% of additional enrolments since 2016. Within this group of schools, Independent schools with average fees less than $2,500, account for 11% of all Independent school enrolments but account for 29% of all additional enrolments.

Schools that have no fee income are generally Majority Indigenous and Torres Strait Islander (MATSIS) or Special Assistance Schools (SAS).

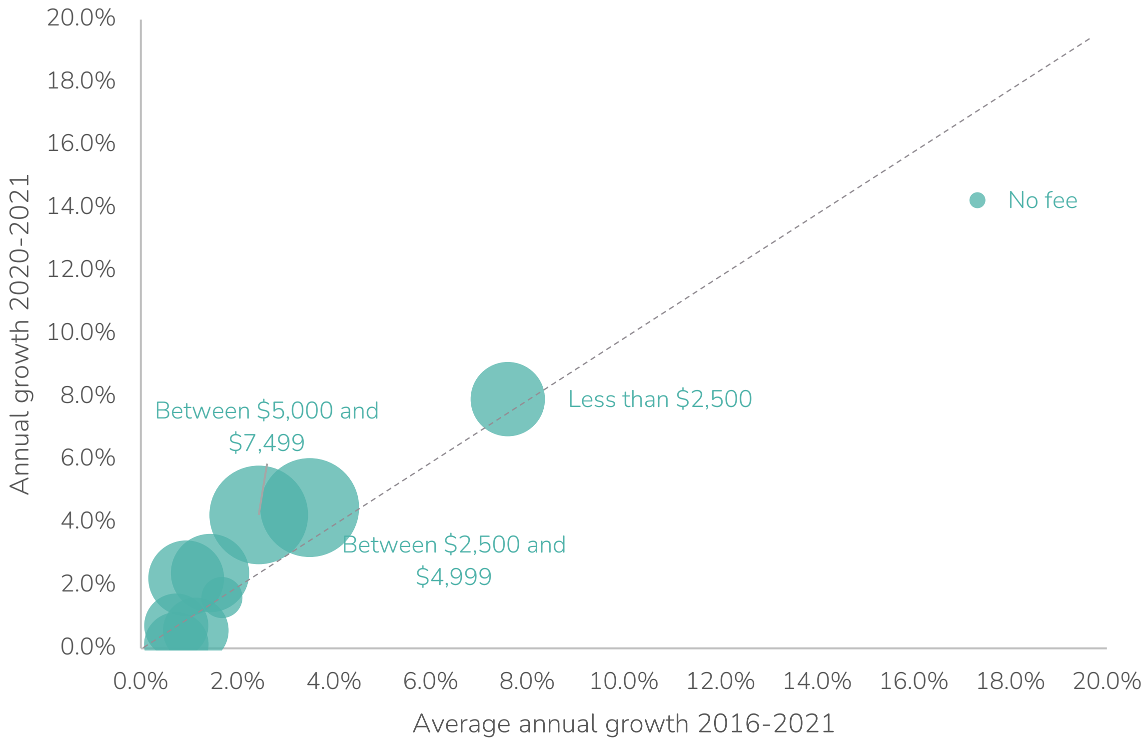
Schools with annual fees of $20,000 or higher, enrol 20% of all Independent school students and only account for 9% of enrolment growth over the past five years.

TABLE 8.1 INDEPENDENT SCHOOL ENROLMENTS BY AVERAGE FEES[7], 2016 - 2021

	STUDENTS IN 2021	ADDITIONAL STUDENTS SINCE 2020	ADDITIONAL STUDENTS SINCE 2016	ANNUAL GROWTH (FROM 2020)	AVG ANNUAL GROWTH (FROM 2016)	PROPORTION OF STUDENTS 2021	PROPORTION OF ADDITIONAL STUDENTS SINCE 2016
NO FEE	3,278	+409	+1,803	14.3%	17.3%	0%	2%
$1 AND $2,499	70,941	+5,211	+21,749	7.9%	7.6%	11%	29%
$2,500 AND $4,999	125,530	+5,380	+19,816	4.5%	3.5%	19%	26%
$5,000 AND $7,499	124,882	+5,085	+14,190	4.2%	2.4%	19%	19%
$7,500 AND $9,999	78,789	+1,843	+5,411	2.4%	1.4%	12%	7%
$10,000 AND $14,999	73,669	+1,606	+3,364	2.2%	0.9%	11%	4%
$15,000 AND $19,999	52,844	+379	+1,899	0.7%	0.7%	8%	3%
$20,000 AND $24,999	55,294	+313	+3,043	0.6%	1.1%	8%	4%
$25,000 AND $29,999	53,383	+66	+1,920	0.1%	0.7%	8%	3%
$30,000 OR GREATER	21,629	+344	+1,729	1.6%	1.7%	3%	2%
TOTAL	**660,239**	**+20,636**	**+74,923**	**3.2%**	**2.4%**	**100%**	**100%**

[7] The latest financial information available is 2020 and this has been used to calculate average fees. Only schools with both 2016 and 2020 financial data are included in this analysis.

FIGURE 8.1 INDEPENDENT SCHOOL ENROLMENT GROWTH BY AVERAGE FEES, 2016 - 2021



Growth in low-fee schools

The table below shows each affiliation enrolment growth by all schools with average fees less than $7,500, and all schools of all fee levels. Within most affiliations, schools with fees of <$7,500 have grown at a faster rate than their higher fee schools.

TABLE 8.2 INDEPENDENT SCHOOL ENROLMENTS BY AFFILIATION*, AVERAGE FEES <$7,500, 2016 – 2021

	STUDENTS IN 2021	ANNUAL GROWTH RATE (FROM 2020) FEES <$7,500	ANNUAL GROWTH RATE (FROM 2020) ALL FEE LEVELS	AVG ANNUAL GROWTH RATE (FROM 2016) FEES <$7,500	AVG ANNUAL GROWTH RATE (FROM 2016) ALL FEE LEVEL
CHRISTIAN	70,889	5.9%	5.3%	4.7%	4.2%
ISLAMIC	42,143	7.4%	7.7%	6.3%	6.5%
NON-DENOMINATIONAL	39,920	6.3%	4.5%	5.3%	2.9%
ANGLICAN	39,273	5.6%	2.5%	3.0%	1.6%
LUTHERAN	27,084	2.9%	2.8%	1.3%	1.1%
BAPTIST	15,020	6.1%	4.4%	5.7%	4.1%
SEVENTH DAY ADVENTIST	14,642	3.6%	3.8%	3.6%	3.9%
CATHOLIC, ROMAN	13,623	-0.1%	0.7%	0.6%	0.6%
OTHER	10,387	7.5%	6.0%	8.2%	4.9%
PENTECOSTAL	7,588	6.8%	6.4%	4.4%	3.9%
ASSEMBLIES OF GOD	7,307	4.0%	4.0%	3.3%	3.3%
STEINER	6,915	4.9%	3.9%	4.2%	2.8%
INTER-DENOMINATIONAL	5,604	4.9%	2.2%	2.5%	1.2%
UNITING CHURCH	3,663	2.6%	0.8%	-2.4%	0.5%
JEWISH	2,489	-1.2%	-1.1%	1.4%	0.4%
MONTESSORI	2,036	5.9%	2.5%	6.8%	1.6%
PRESBYTERIAN	1,386	4.8%	2.4%	3.6%	1.6%
TOTAL	**324,631**	**5.2%**	**3.4%**	**4.0%**	**2.4%**

*Affiliations with less than 10 schools nationally have been omitted.

The table below shows Independent school enrolments by remoteness for schools with average annual fees of $7,500 or less. As noted previously, growth in low-fee schools appears to be high, regardless of remoteness.

TABLE 8.3 INDEPENDENT SCHOOL ENROLMENTS BY GEOLOCATION, AVERAGE FEES <$7,500, 2016 - 2021

	STUDENTS IN 2021	ANNUAL GROWTH RATE (FROM 2020) FEES <$7,500	ANNUAL GROWTH RATE (FROM 2020) ALL FEE LEVELS	AVG ANNUAL GROWTH RATE (FROM 2016) FEES <$7,500	AVG ANNUAL GROWTH RATE (FROM 2016) ALL FEE LEVEL
MAJOR CITIES	227,881	5.3%	3.2%	4.1%	2.4%
INNER REGIONAL	72,554	4.9%	4.2%	4.0%	2.8%
OUTER REGIONAL	21,256	5.9%	5.7%	3.0%	2.0%
REMOTE	1,581	-1.6%	-2.2%	-2.2%	-2.8%
VERY REMOTE	1,359	-0.4%	1.2%	0.1%	-0.1%
TOTAL	**324,631**	**5.2%**	**3.4%**	**4.0%**	**2.4%**

Low-fee systemic Catholic schools

In 2020, 96% of systemic Catholic schools reported annual fees of $7500 or less, yet the levels of growth seen are significantly lower than those seen in Independent schools.

TABLE 8.4 ENROLMENT GROWTH COMPARISON – CATHOLIC AND INDEPENDENT LOW-FEE SCHOOLS

	SCHOOLS IN 2021	ANNUAL GROWTH RATE (FROM 2020)	AVG ANNUAL GROWTH RATE (FROM 2016)
SYSTEMIC CATHOLIC SCHOOLS	1,702	1.4%	0.6%
INDEPENDENT SCHOOLS, FEES <$7,500	773	5.2%	4.0%

Clearly, Independent schools have characteristics that drive growth and parental choice. See the ISA School Choice Survey Report for more information.

AFFILIATION, STATE, REMOTENESS 9

The combinations of affiliation, state/territory and remoteness, which have experienced the largest enrolment growth in the Independent sector are listed below.

- Christian schools in Queensland major cities (Brisbane to Tweed Heads, Brisbane to Caboolture, Noosa Heads to Caloundra)
- Islamic schools in New South Wales major cities (Sydney, Blue Mountains, Wollongong, Newcastle, Tweed Heads)
- Anglican schools in New South Wales major cities
- Non-denomination schools in Victorian major cities
- Islamic schools in Victorian major cities

More detail of different growth rates by affiliation, state and remoteness is provided below.

TABLE 9.1 INDEPENDENT SCHOOL ENROLMENTS BY AFFILIATION, STATE AND REMOTENESS, 2016 - 2021

	STUDENTS IN 2021	AVERAGE FEES PER SCHOOL	ADDITIONAL STUDENTS SINCE 2016	ANNUAL GROWTH (FROM 2020)	AVG ANNUAL GROWTH (FROM 2016)
CHRISTIAN+QLD+MAJOR CITIES	19,949	$3,354	+5,997	7.1%	7.4%
ISLAMIC+NSW+MAJOR CITIES	19,759	$2,772	+4,885	7.6%	5.8%
ANGLICAN+NSW+MAJOR CITIES	41,286	$18,275	+4,515	3.3%	2.3%
NON-DENOMINATIONAL+VIC+MAJOR CITIES	26,168	$8,023	+4,315	3.6%	3.7%
ISLAMIC+VIC+MAJOR CITIES	14,943	$2,564	+3,939	5.6%	6.3%
ANGLICAN+NSW+INNER REGIONAL	14,033	$6,371	+2,361	7.0%	3.8%
NON-DENOMINATIONAL+QLD+MAJOR CITIES	18,423	$5,434	+2,194	5.7%	2.6%
NON-DENOMINATIONAL+NSW+MAJOR CITIES	24,584	$8,371	+2,079	2.9%	1.8%
CHRISTIAN+VIC+MAJOR CITIES	9,774	$6,851	+2,044	7.4%	4.8%
UNITING CHURCH+VIC+MAJOR CITIES	18,286	$22,101	+1,720	0.6%	2.0%
CHRISTIAN+QLD+INNER REGIONAL	6,074	$2,517	+1,653	4.0%	6.6%
BAPTIST+WA+MAJOR CITIES	9,402	$4,464	+1,646	4.8%	3.9%
ANGLICAN+QLD+MAJOR CITIES	20,761	$12,876	+1,594	1.5%	1.6%
CHRISTIAN+NSW+MAJOR CITIES	14,079	$5,566	+1,418	4.9%	2.1%
CATHOLIC, ROMAN+NSW+MAJOR CITIES	32,158	$11,131	+1,415	0.7%	0.9%
ANGLICAN+VIC+MAJOR CITIES	31,574	$21,840	+1,333	0.0%	0.9%
LUTHERAN+QLD+MAJOR CITIES	15,535	$7,264	+1,327	4.0%	1.8%
NON-DENOMINATIONAL+WA+MAJOR CITIES	4,433	$7,719	+1,210	13.0%	6.6%
SEVENTH DAY ADVENTIST+NSW+MAJOR CITIES	5,975	$4,796	+1,202	4.0%	4.6%
NON-DENOMINATIONAL+NSW+INNER REGIONAL	4,283	$4,601	+967	7.6%	5.3%
ISLAMIC+WA+MAJOR CITIES	4,501	$1,725	+945	11.2%	4.8%
ISLAMIC+SA+MAJOR CITIES	1,645	$1,889	+934	9.4%	18.3%
ISLAMIC+QLD+MAJOR CITIES	2,556	$1,662	+897	14.6%	9.0%
CHRISTIAN+WA+MAJOR CITIES	6,330	$3,987	+844	7.4%	2.9%
LUTHERAN+VIC+MAJOR CITIES	4,499	$6,200	+825	5.1%	4.1%

GRADE LEVELS 10

While Independent school enrolment growth is higher in low-fee schools, it has generally increased across the board.

When analysing enrolment growth by grade level, the data also suggests that this growth has been experienced across almost every grade level. From years 0 to 12, all but three grades had above average increases in enrolment numbers in 2021 compared to the average annual growth of the past five years.

While historically growth in Independent school enrolments has occurred primarily in years 5 to 9, accounting for 53% of growth over the last five years, from 2020 to 2021 the same grades accounted for only 44% of growth. This suggests that in 2021, potentially influenced by the Covid-19 pandemic, instead of parents typically waiting for years 5 to 9 to enrol their children in Independent schools, parents may have moved their children over immediately, regardless of their starting year.

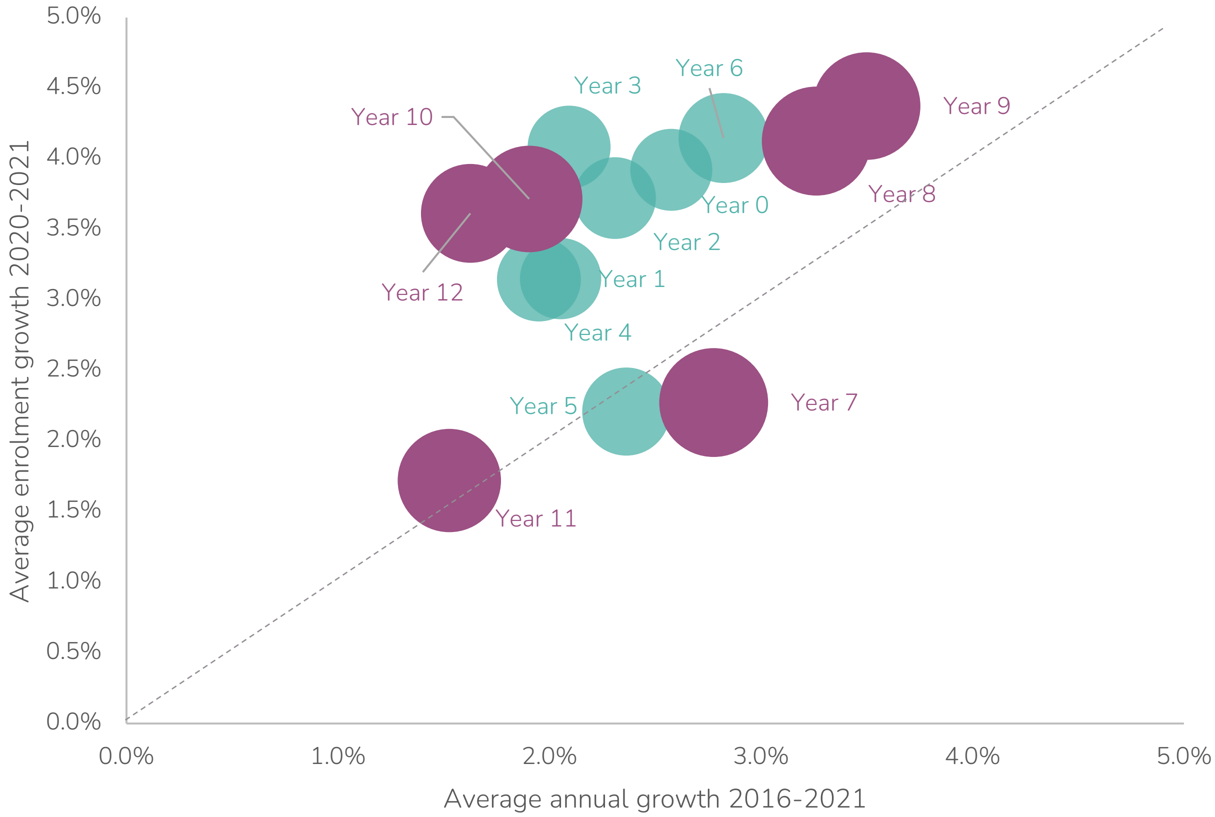
TABLE 10.1 INDEPENDENT SCHOOL ENROLMENTS BY GRADE LEVEL, 2016 - 2021

	STUDENTS IN 2021	ADDITIONAL STUDENTS SINCE 2020	ADDITIONAL STUDENTS SINCE 2016	ANNUAL GROWTH (FROM 2020)	AVG ANNUAL GROWTH (FROM 2016)	PROPORTION OF ADDITIONAL STUDENTS SINCE 2020	PROPORTION OF ADDITIONAL STUDENTS SINCE 2016
UNGRADED PRIMARY	1,917	+90	+316	4.9%	3.7%	0%	0%
UNGRADED SECONDARY	1,367	+110	+394	8.7%	7.0%	1%	1%
YEAR 0	38,118	+1,439	+4,552	3.9%	2.6%	7%	6%
YEAR 1	37,526	+1,146	+3,625	3.2%	2.1%	5%	5%
YEAR 2	37,962	+1,362	+4,097	3.7%	2.3%	6%	5%
YEAR 3	39,093	+1,533	+3,846	4.1%	2.1%	7%	5%
YEAR 4	40,032	+1,221	+3,685	3.1%	2.0%	6%	5%
YEAR 5	44,102	+953	+4,861	2.2%	2.4%	4%	6%
YEAR 6	45,958	+1,830	+5,972	4.1%	2.8%	8%	8%
YEAR 7	67,314	+1,496	+8,614	2.3%	2.8%	7%	12%
YEAR 8	67,518	+2,675	+10,012	4.1%	3.3%	12%	13%
YEAR 9	65,752	+2,755	+10,390	4.4%	3.5%	13%	14%
YEAR 10	64,479	+2,310	+5,803	3.7%	1.9%	11%	8%
YEAR 11	60,630	+1,026	+4,423	1.7%	1.5%	5%	6%
YEAR 12	55,491	+1,935	+4,300	3.6%	1.6%	9%	6%
TOTAL	**667,259**	**+21,881**	**+74,890**	**3.4%**	**2.4%**	**100%**	**100%**

TABLE 10.2 INDEPENDENT SCHOOL ENROLMENTS BY PRIMARY / SECONDARY, 2016 - 2021

	STUDENTS IN 2021	ADDITIONAL STUDENTS SINCE 2020	ADDITIONAL STUDENTS SINCE 2016	ANNUAL GROWTH (FROM 2020)	AVG ANNUAL GROWTH (FROM 2016)	PROPORTION OF ADDITIONAL STUDENTS SINCE 2020	PROPORTION OF ADDITIONAL STUDENTS SINCE 2016
PRIMARY YEAR 0 TO 6	284,710	+9,574	+30,955	3.5%	2.3%	44%	41%
SECONDARY YEAR 7 TO 12	382,549	+12,306	+43,935	3.3%	2.5%	55%	59%
TOTAL	**667,259**	**+21,881**	**+74,890**	**3.1%**	**2.4%**	**100%**	**100%**

FIGURE 10.1 INDEPENDENT SCHOOL ENROLMENT GROWTH BY GRADE LEVEL, 2016 - 2021



PREDICTORS OF GROWTH 11

Predicting enrolment growth of an Independent school based on its characteristics

Looking retrospectively at annual fees via regression analysis indicates that affordability is a predictor of growth ($p<0.05$). But this is not the sole factor for explaining the changes in enrolments. Indeed, its R^2 value is so low (0.04) that it is a slight predictor at best.

Other variables have been assessed to determine whether they are a predictor of enrolment growth – school size, capacity to contribute score, ICSEA score, remoteness, state/territory and affiliation. Below are some general statements about current predictors of enrolment growth;

- School fees are a minor predictor of growth – lower fees indicate higher growth
- Being located in NT is a minor predictor of negative growth
- Being a Christian or Islamic school is a minor predictor of growth

These statements are broad generalisations and so need to be treated with caution. Does being a Christian school alone indicate the school will grow every year, or at all? At a national and state/territory aggregate level growth may be high, but one in four Christian schools actually decreased in enrolments from 2020 to 2021. One in four Independent schools with fees below $7,500 also saw decreased enrolments. Low-fee systemic Catholic schools have not experienced anywhere near the same level of growth within most states and territories.

There are many potential predictors for which we have no data. Factors include the capacity of individual schools to take more enrolments, whether a school is a high population/high growth area, increased/decreased access to public transport and reputation of the school. It is for these reasons we can only make general statements about the type of schools experiencing enrolment growth, and their characteristics.