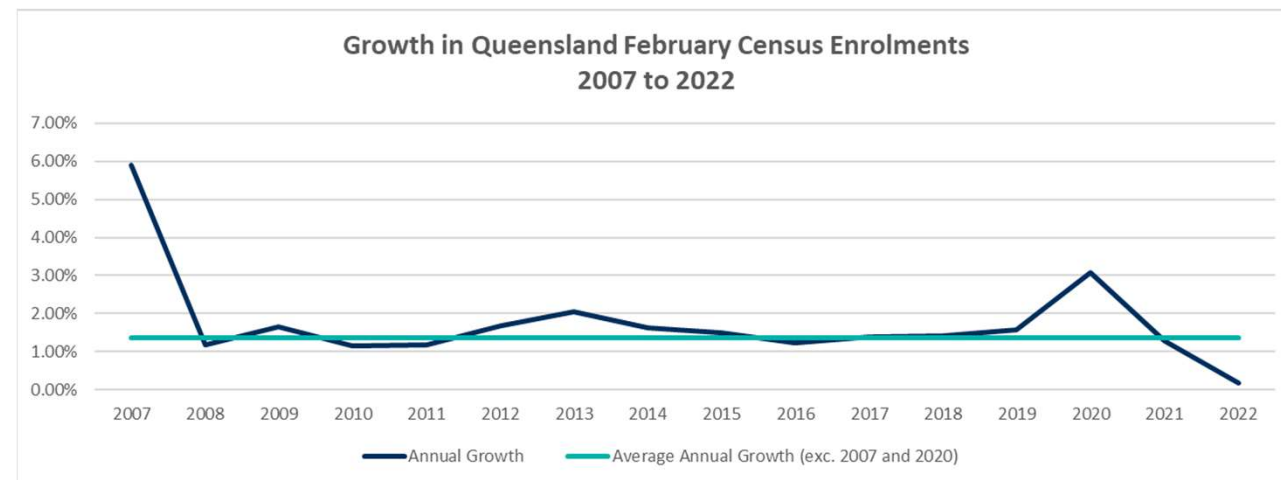
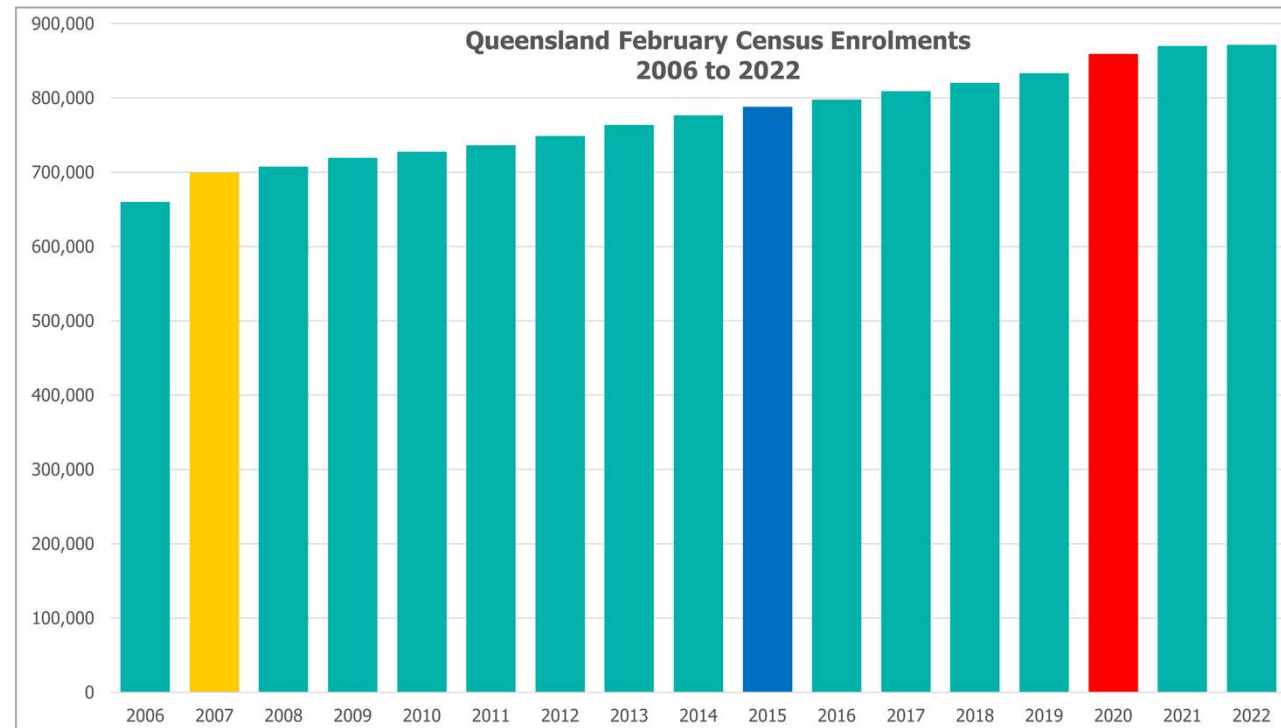


Impact of COVID on Queensland enrolment trends

25 October 2022

Enrolment trends

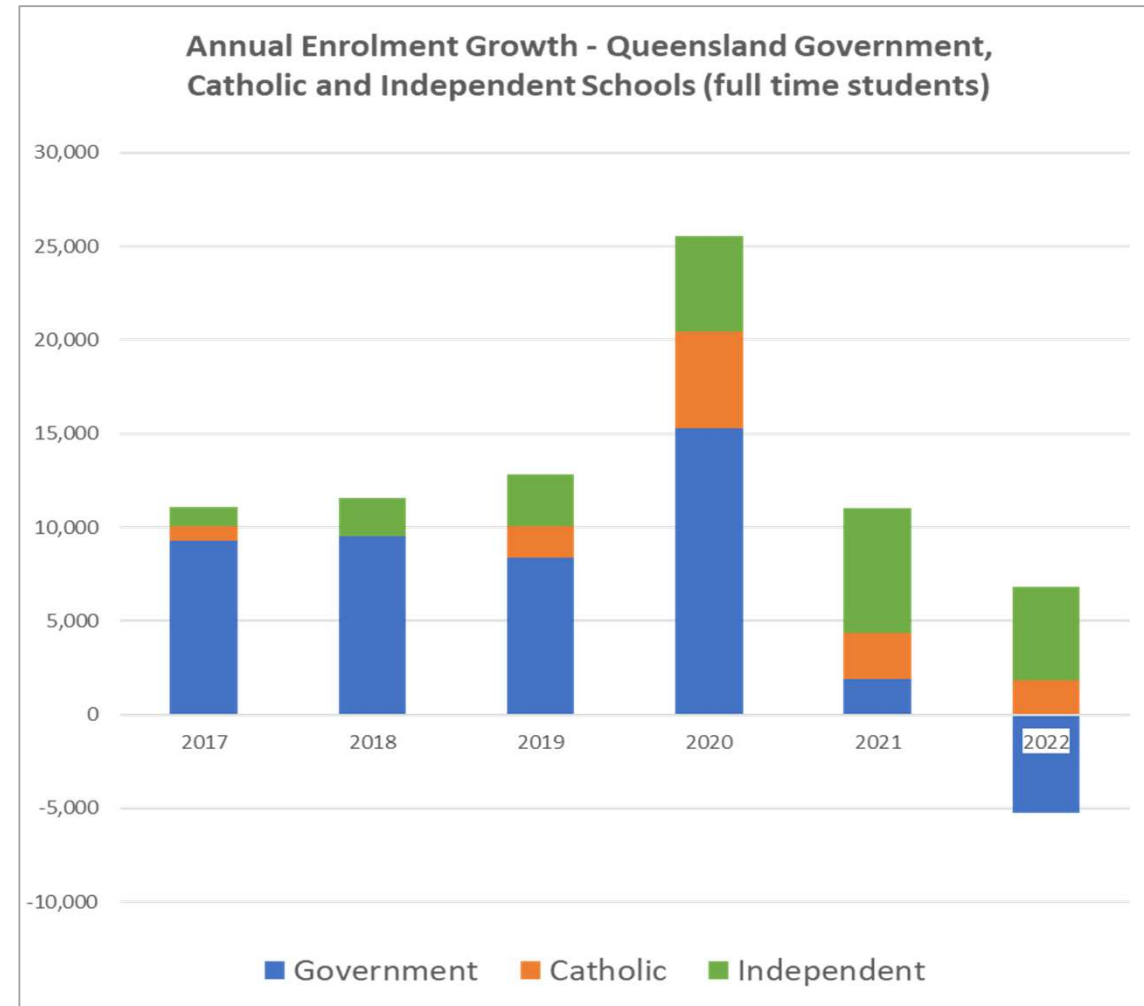
- Between 2006 and 2022, the Queensland education system has grown by more than 210,000 additional enrolments
 - Average Qld enrolment growth 1.76% per annum 2007 to 2022 or 1.37% when excluding the original PY cohort impacts in 2007 and 2020.
- **2007:** Introduction of Prep Year in conjunction with a change to the starting age for students – approximately 2/3 additional cohorts
- **2015:** Year seven cohort moved from primary to secondary
- **2020:** WHO declared COVID pandemic and first year with full cohorts in each year level



Source: Department of Education, Count of full-time students, February Census. Early childhood students not included.

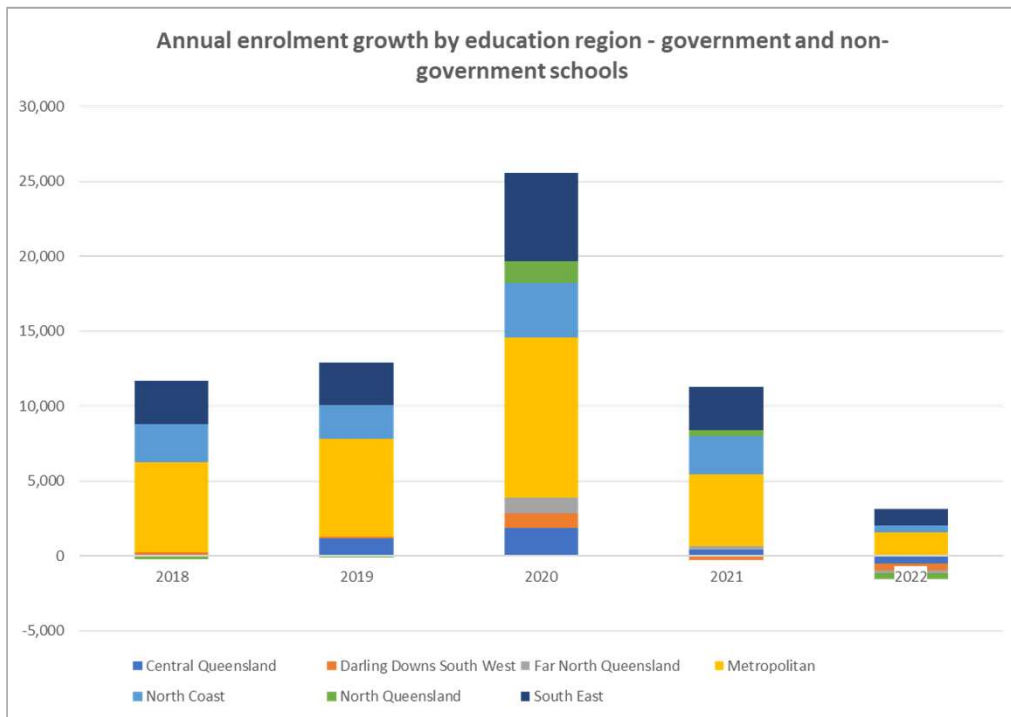
..and then COVID

- 2020 saw high growth due to full cohorts across all year levels – did this mask the initial impacts of COVID?
- Post-2020:
 - Increased enrolment growth in Independent schools
 - Trend growth in Catholic schools although more than recently
 - Significantly reduced growth and then decline in state school enrolments

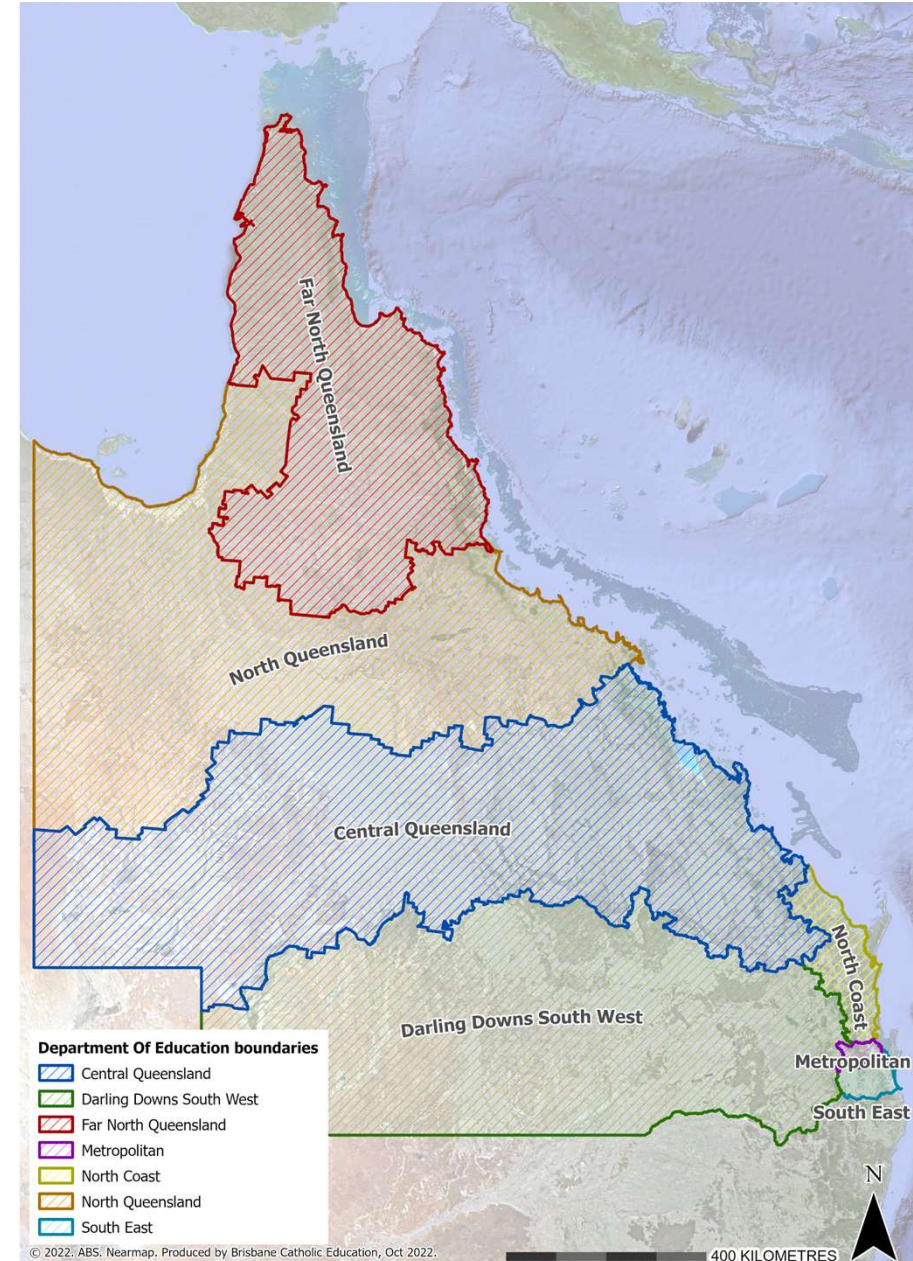


Changes in distribution of growth

- Pre-COVID enrolment growth driven by South East, Metropolitan and North Coast regions with relatively stable enrolments elsewhere
- 2021 and 2022 saw reduced growth across all areas of Queensland
- Modest growth still occurring in major growth areas in south-east Queensland

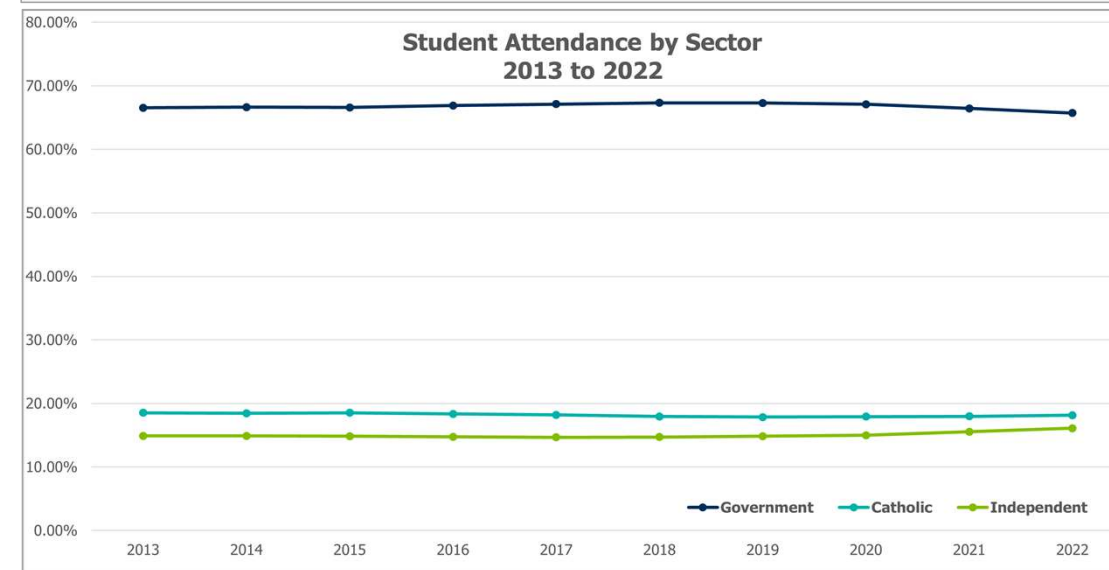
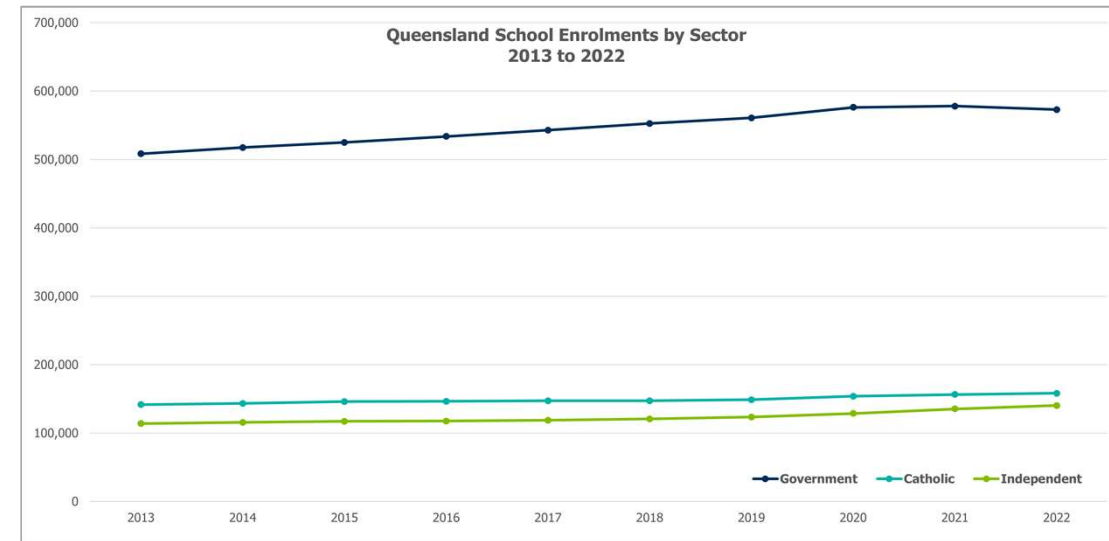


Source: Department of Education, Count of full-time students, February Census. Early childhood students not included.



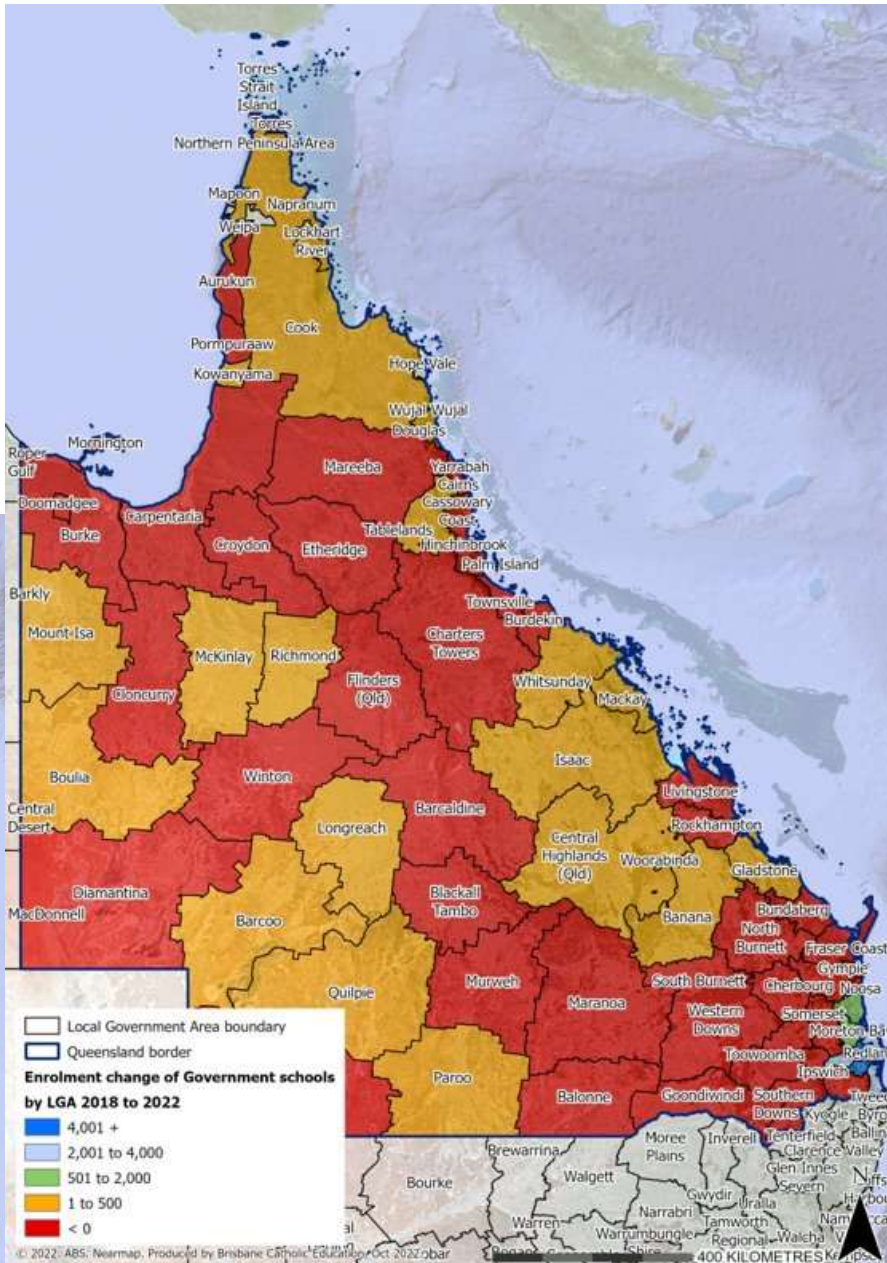
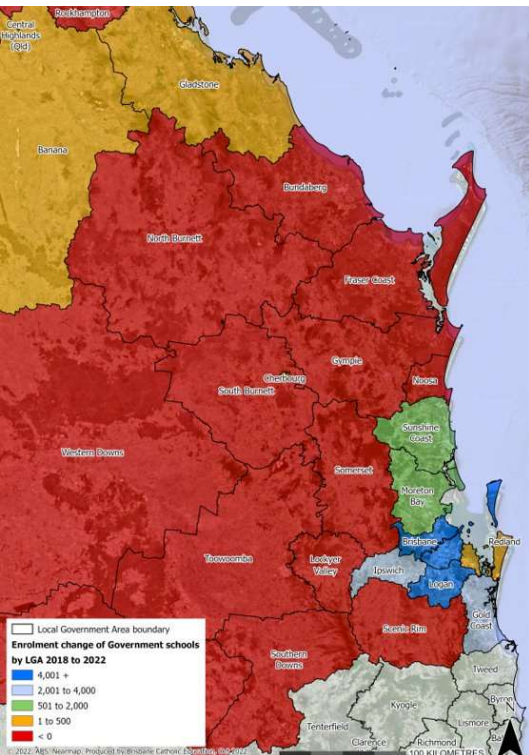
What is happening across the three sectors?

- **Government:** Enrolments were rapidly increasing until 2020 where it stabilised. Market share peaked in **2018 at 67.34%** and as of 2022 is **currently sitting at 65.73%**.
- **Catholic:** Grown by more than 16,500 enrolments in the past ten years with more than **158,000 enrolments in 2022**. Market share is consistently around 18%.
- **Independent:** Fastest growing sector with a growth rate of 23% over the past ten years. Market share has grown from 14.91% in 2013 to 16.11% in 2022.



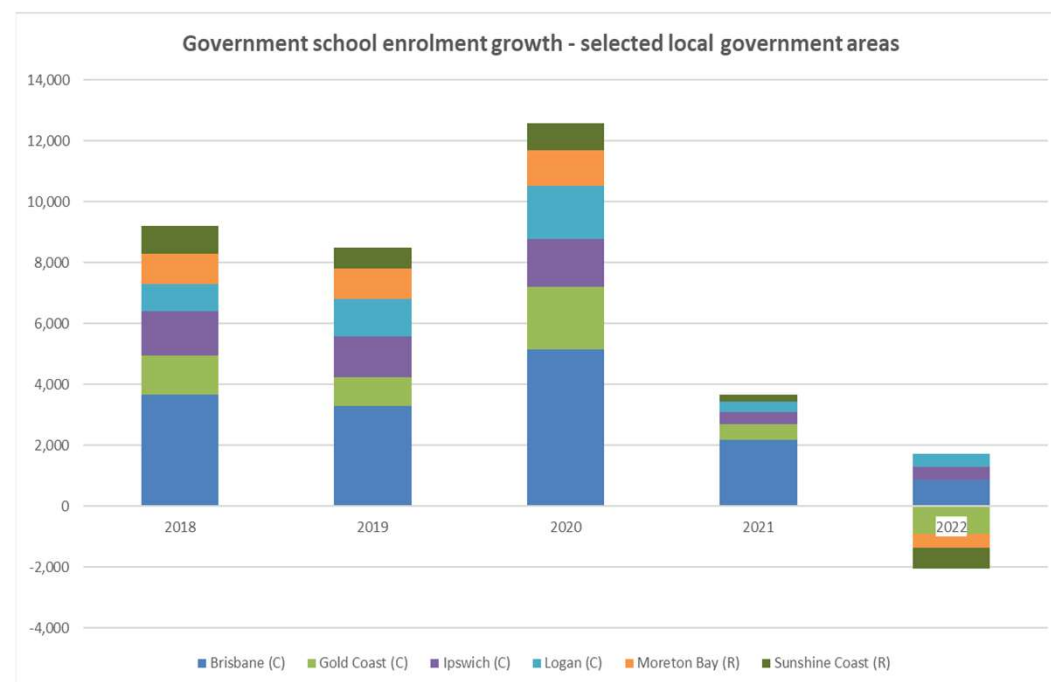
Emerging trends – Government Schools

- Enrolment growth from 2018 to 2022 has been highly localised to the south-east of the state.
- Decline, modest growth or stable enrolments across the remainder of the state, including major centres.



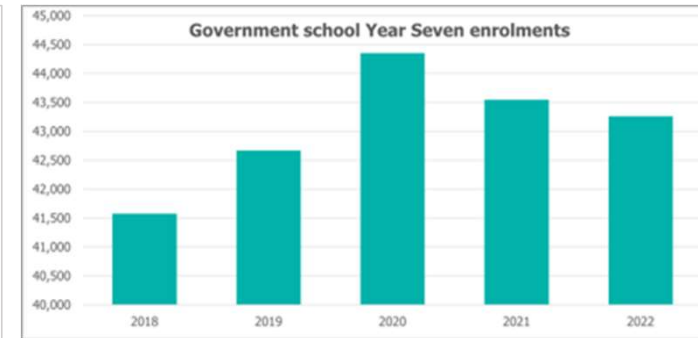
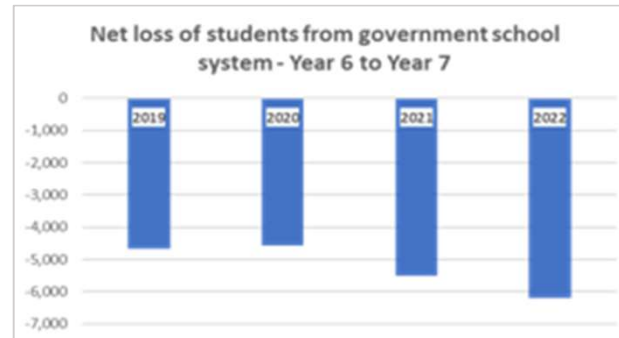
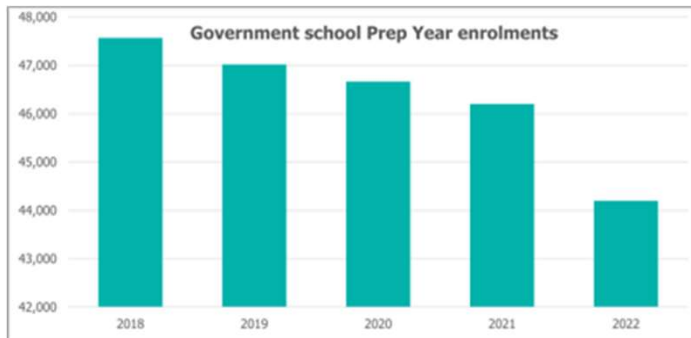
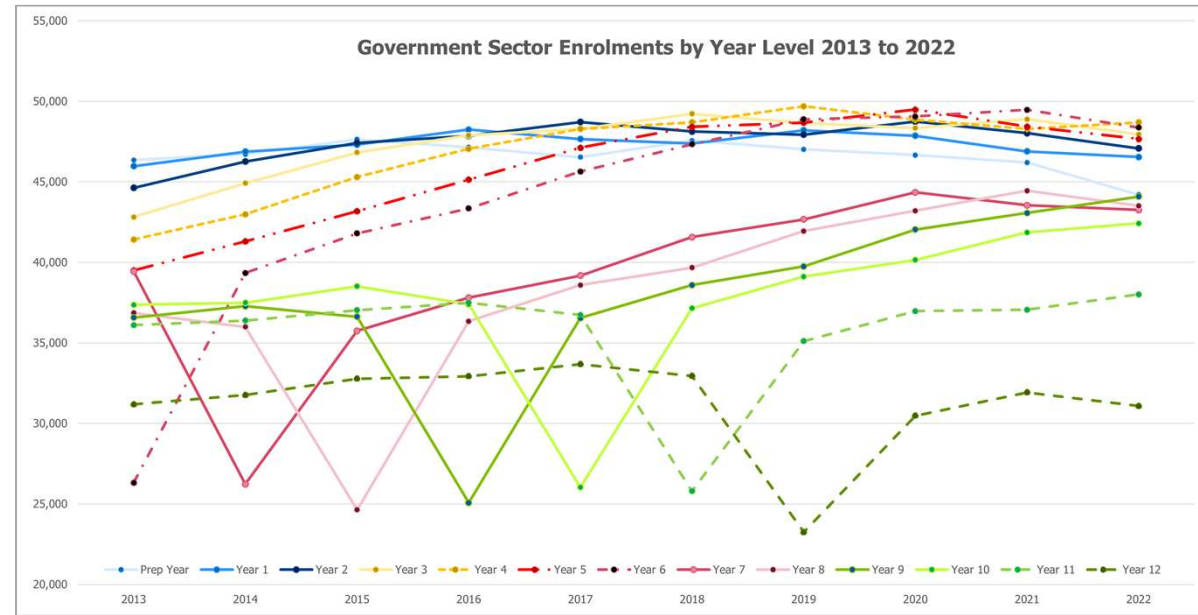
Emerging trends – Government Schools

- From 2018 to 2021 key growth areas were:
 - Brisbane +10,700 (9.1%)
 - Ipswich +3,300 (12.0%)
 - Logan +3,400 (9.1%)
 - Gold Coast +3,300 (5.5%)
 - Moreton Bay +2,000 (3.8%)
 - Sunshine Coast +1,900 (5.4%)
- Significantly impacted in 2022
 - Declining enrolments for Gold Coast (-900), Sunshine Coast (-700) and Moreton Bay (-300)
 - Reduced growth Brisbane, Ipswich and Logan
 - Inconsistent with building approvals – which saw growth in 2021 and 2022 financial years



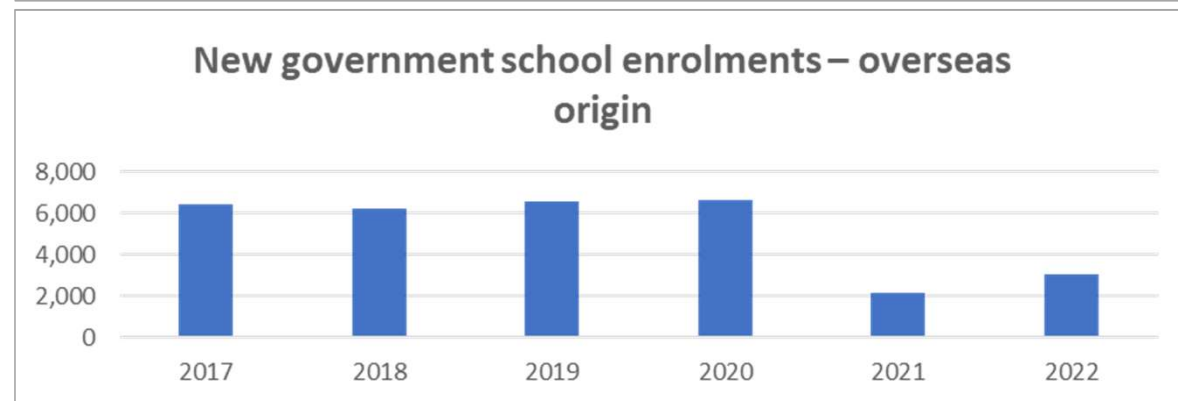
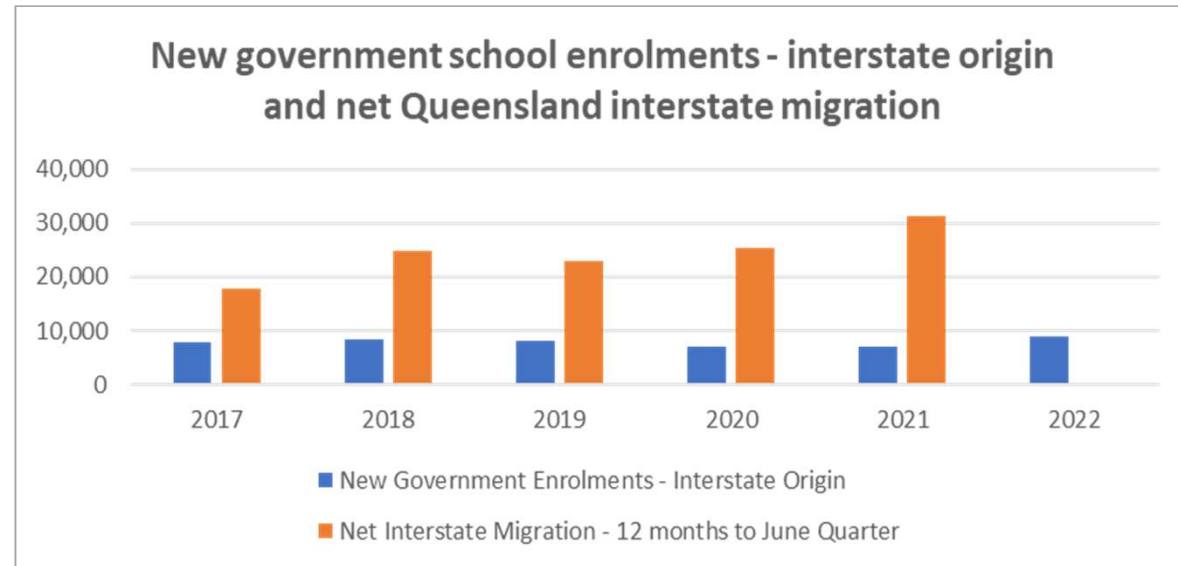
What is happening in government schools?

- Declining Prep Year Enrolments
- Larger loss of government school enrolments between year 6 and 7
 - Linked to increase in growth in non-government schools
- Lower apparent retention rate in year levels 10-12
 - Commonly linked to improved employment conditions



What is happening in government schools?

- No significant increase in new interstate enrolments – despite higher migration levels at a state level
- Major reduction in international migration – showing signs of recovery



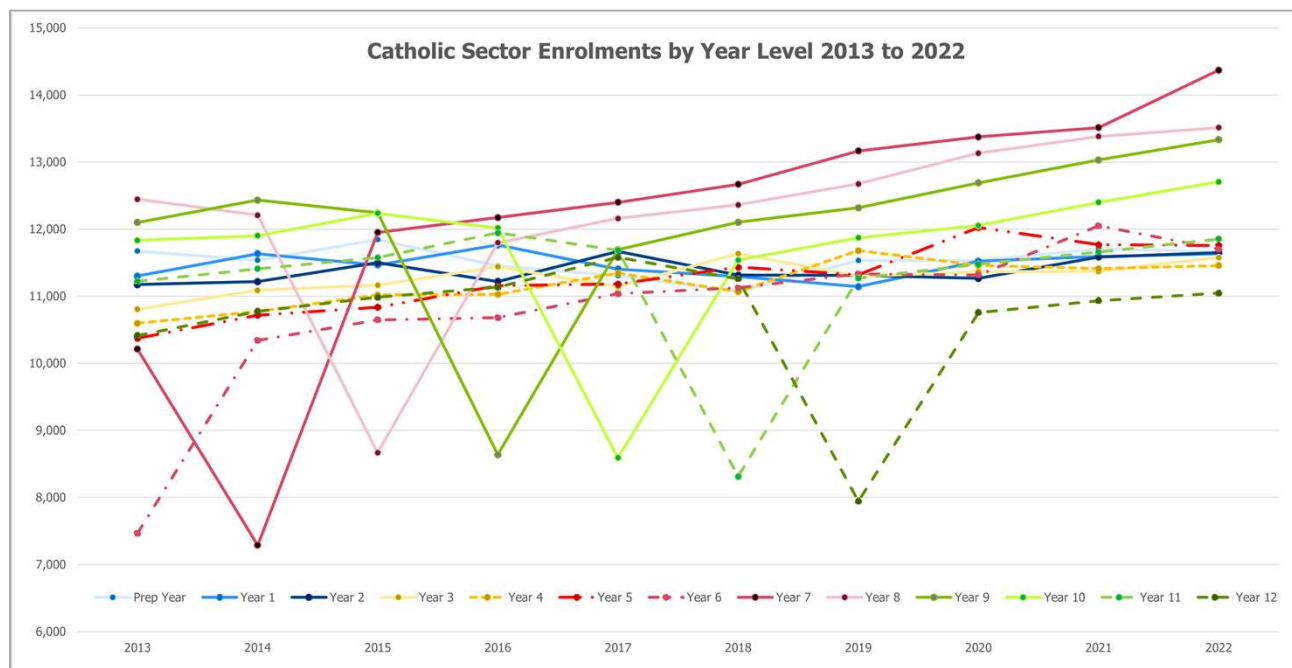
Source:
Department of Education enrolment data
Australian Bureau of Statistics (2022), Table 2 Population Change, Components – State and Territories (Number), *National, state and territory population*.

Emerging trends – Catholic schools

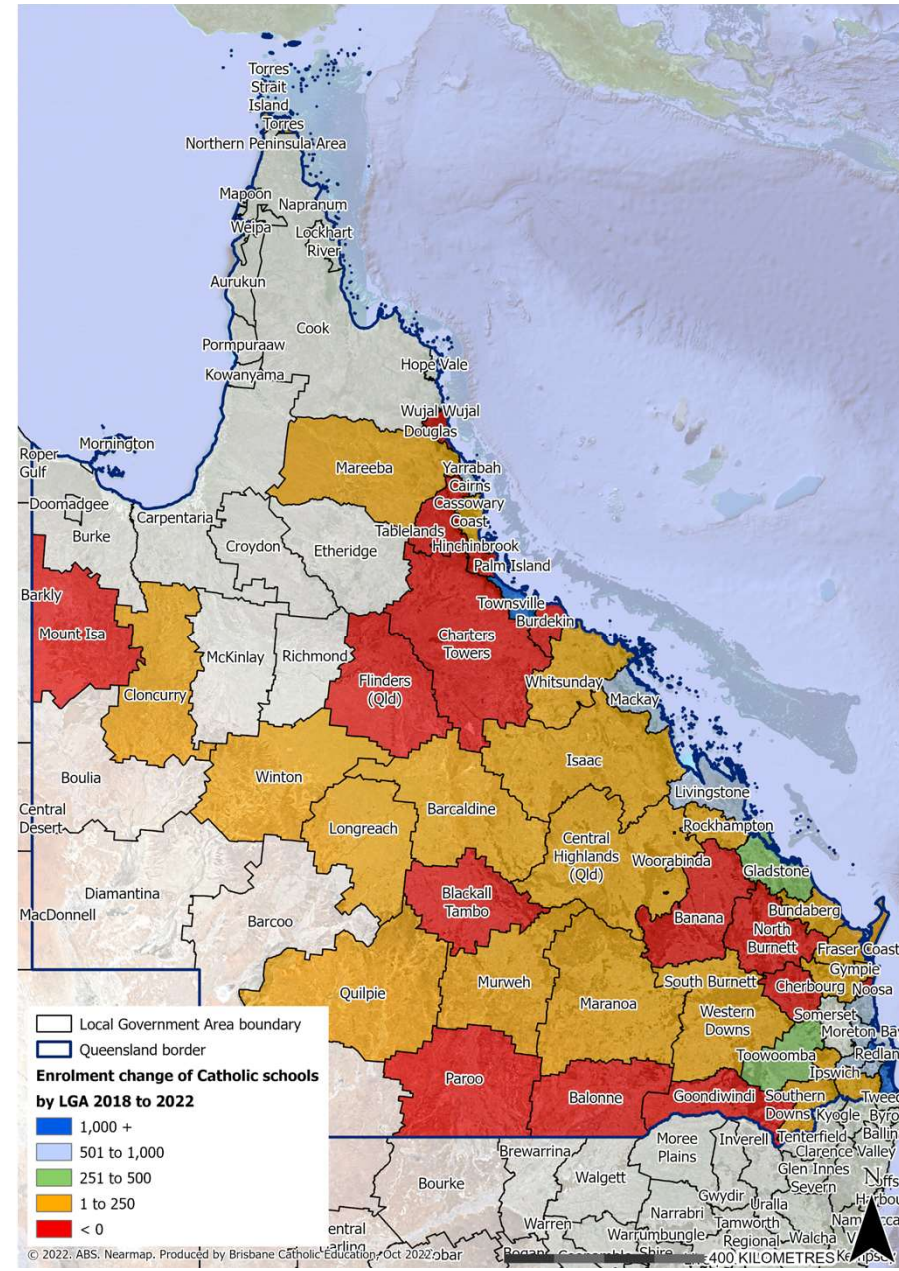
- Since 2016, the year seven cohort has been the largest cohort across the Catholic sector.

2015: Year seven cohort moved to secondary

2019: The original Prep Year cohort finished school

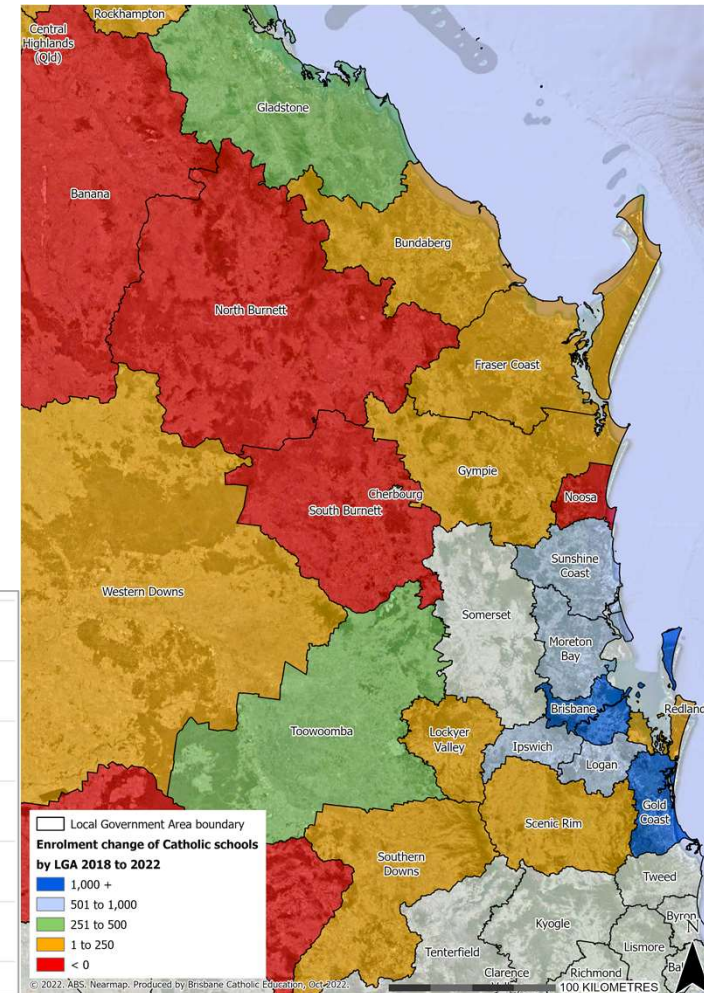
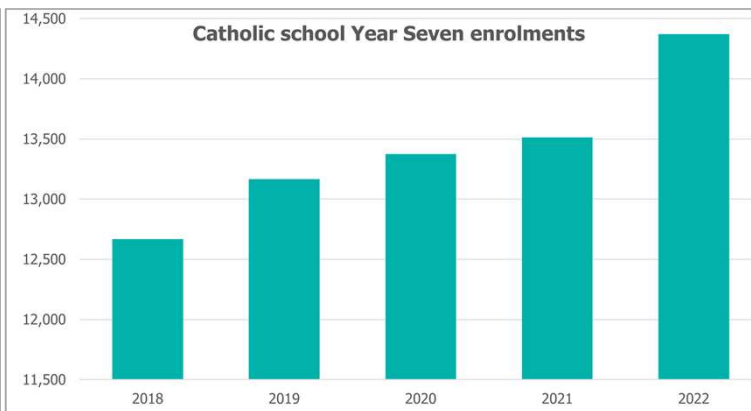
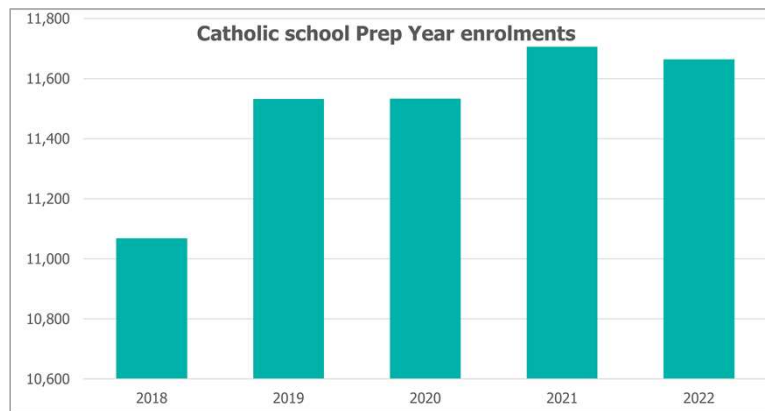


Source: Department of Education, Count of full-time students, February Census. Early childhood students not included.



Emerging trends – Catholic schools

- South-East Queensland enrolments are generally increasing for Catholic schools
 - Brisbane and Gold Coast local government areas have experienced the greatest increase in enrolments
 - The prep cohort experienced the greatest numbers in the past five years in 2021 with 11,706 enrolments
- The year seven cohort has experienced growth every year over the past five years

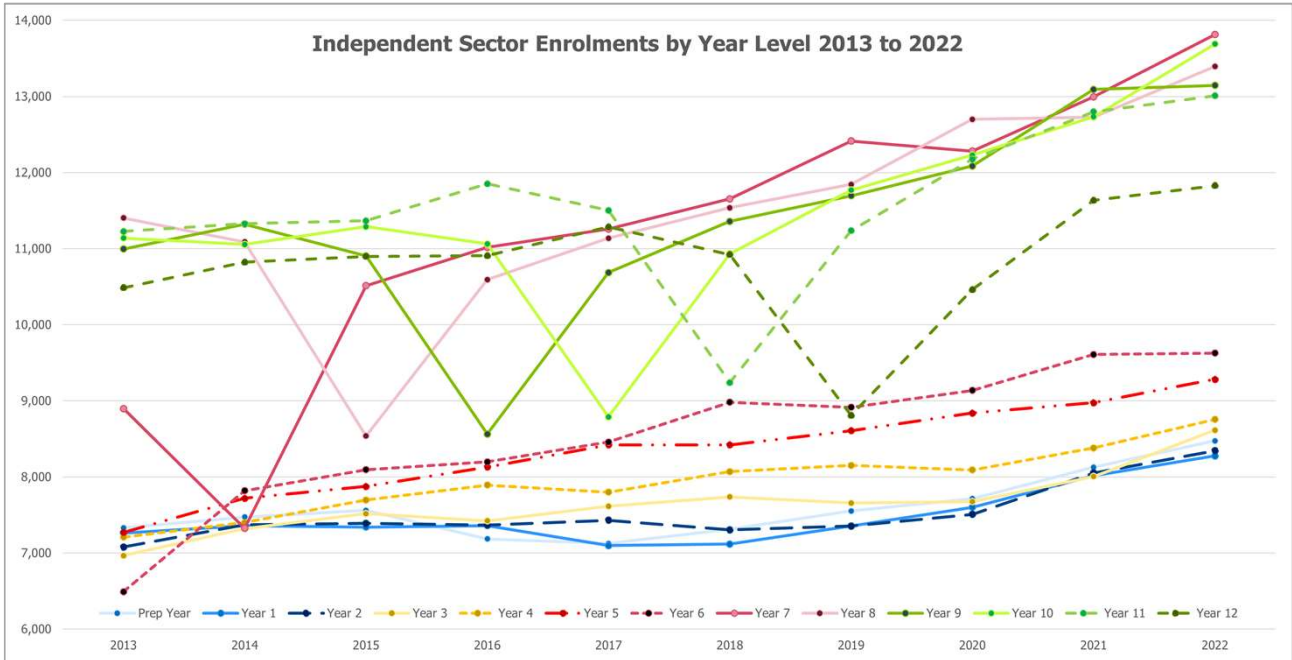


Source: Department of Education, Count of full-time students, February Census. Early childhood students not included.

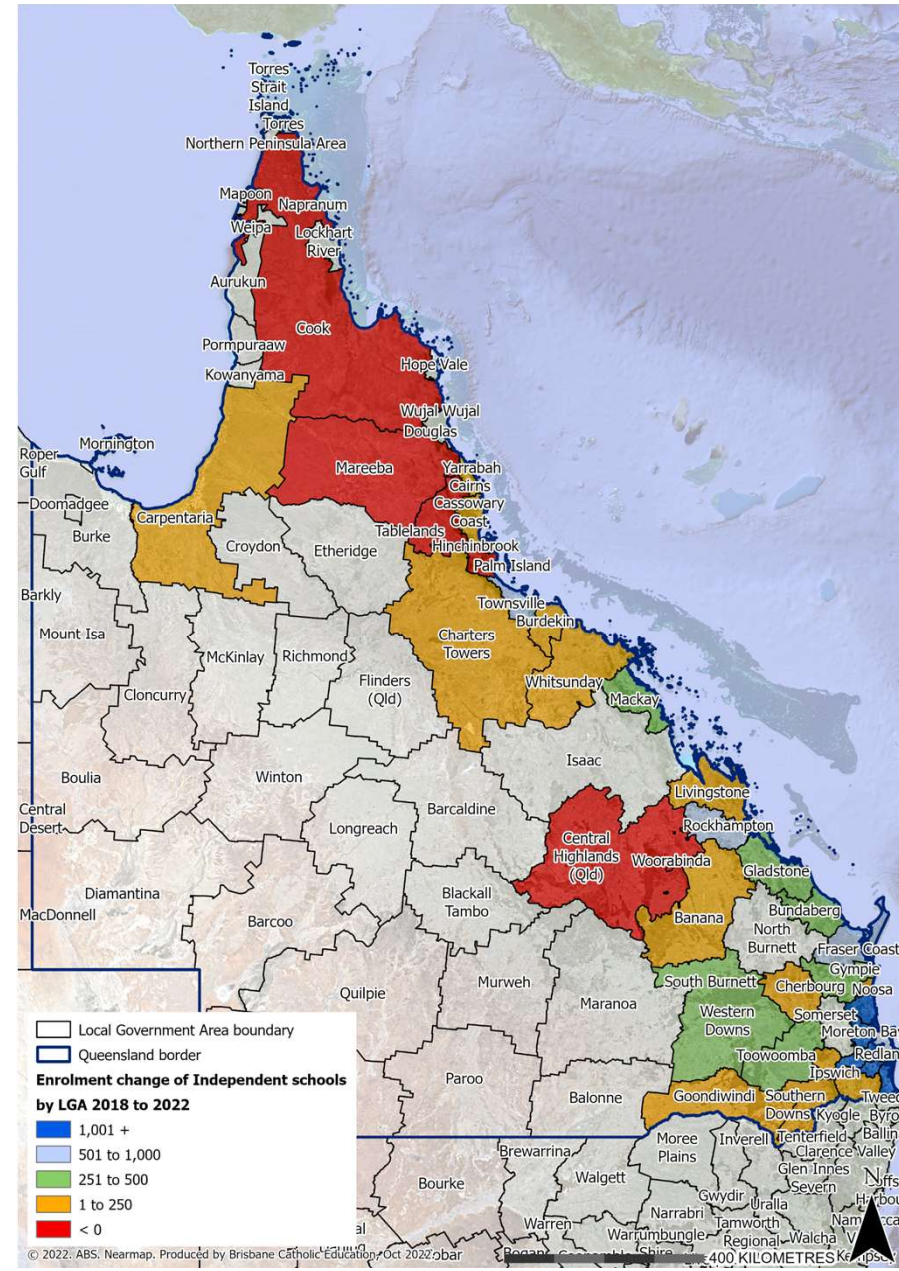
Emerging trends – Independent schools

- The largest cohorts for independent schools are year seven to 11
- Prep to year two are the smallest cohorts

2015: Year seven cohort moved to secondary
2019: The original Prep Year cohort finished school

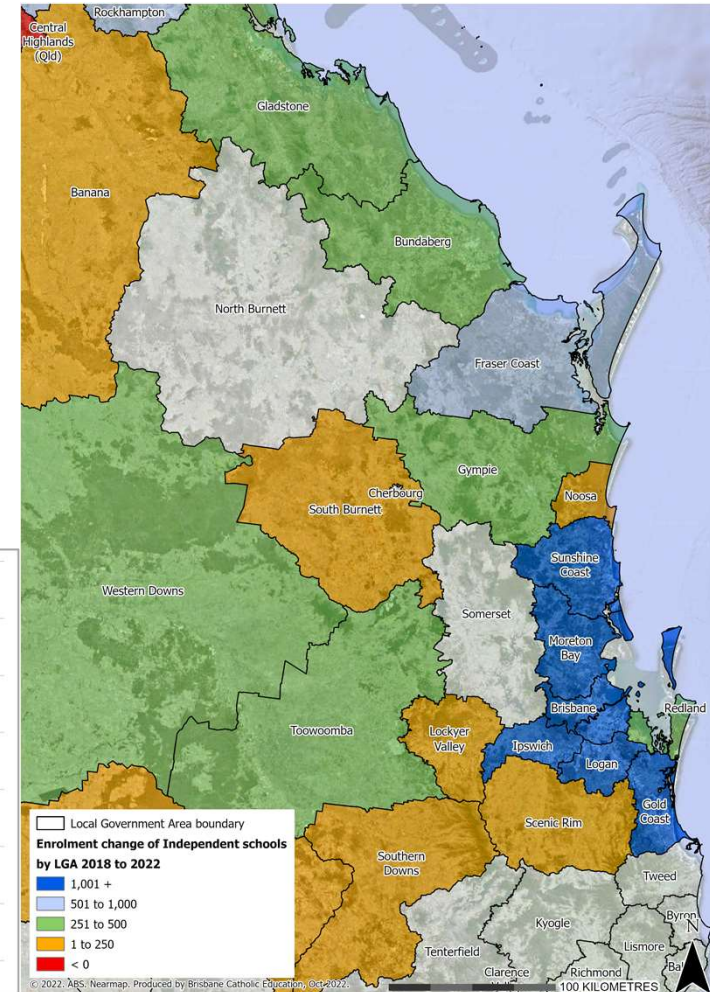
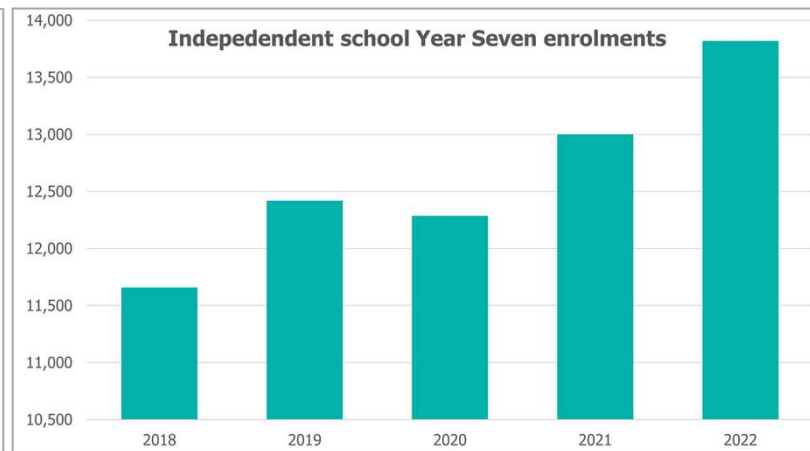
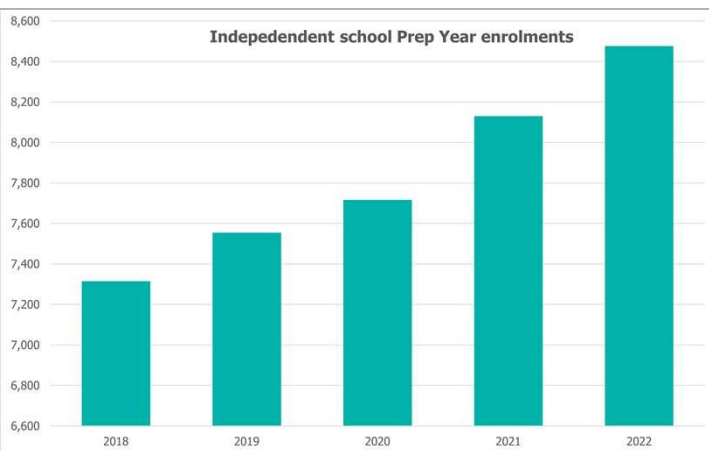


Source: Department of Education, Count of full-time students, February Census. Early childhood students not included.



Emerging trends – Independent schools

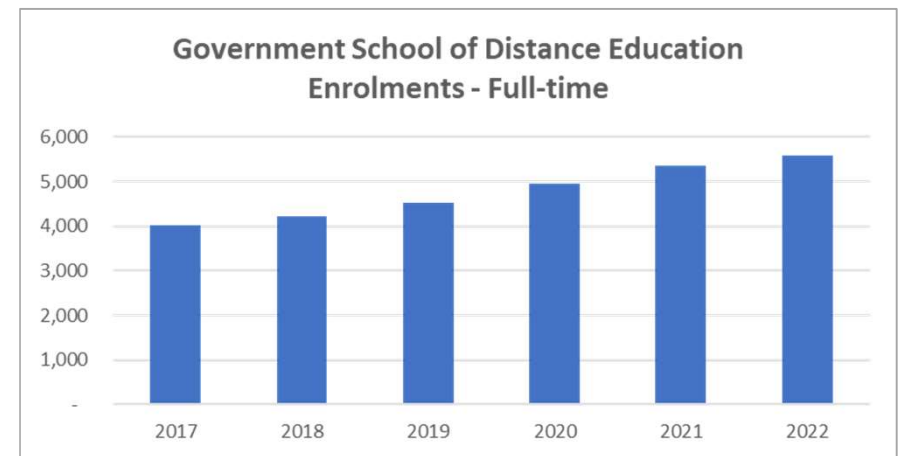
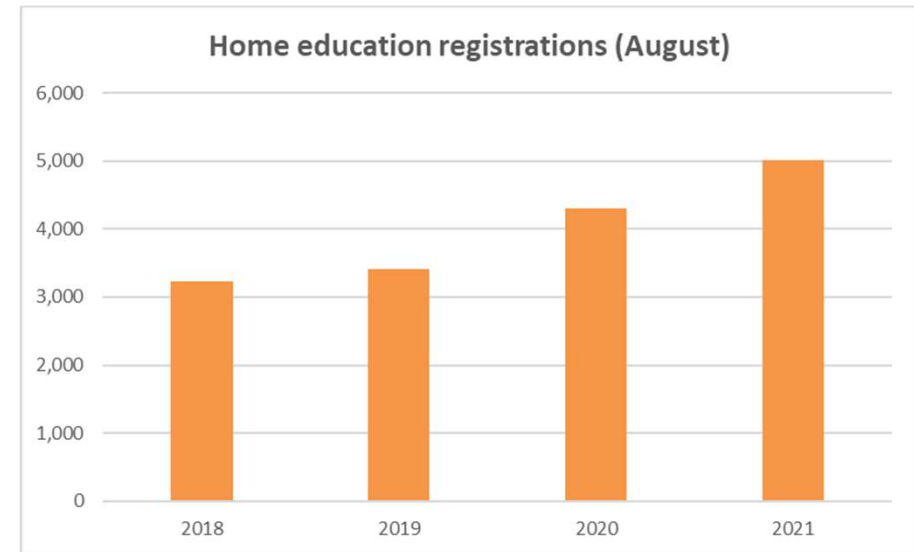
- South-East Queensland enrolments are increasing for Independent schools
 - 43% of enrolments from Independent schools in Queensland are located within the Brisbane or Gold Coast local government areas
- The prep and year seven cohort have experienced **growth every year** between 2018 to 2022 *except 2020* where the year seven cohort experienced a slight decline



Source: Department of Education, Count of full-time students, February Census. Early childhood students not included.

What else is happening

- Rapidly increasing home education registrations – accelerating trend
- Increase in School of Distance Education enrolments – continuing trend



Next 5 years

- High degree of uncertainty
- Return to historical rates of population growth?
- Can non-government sector continue to increase capacity to support this rate of growth? Impact on capital funding.
- Return to long-term trend of declining government schooling share or short term stability?

Questions