INDEPENDENT BOARDING SCHOOLS

DATA REVIEW 2011 TO 2020

JULY 2021

INDEPENDENT SCHOOLS AUSTRALIA

REVIEW PURPOSE 1

The purpose of this data review is to examine the data available to Independent Schools Australia (ISA) for students who board at school and the boarding facilities provided by those schools.

The data review examined:

- **data across all sectors and state and territories in Australia to see how students who board and boarding facilities within the Independent sector, compare to the government and Catholic sectors; and**
- **Independent sector specific data over the period 2011 to 2020 to evaluate any trends in student enrolments, and boarder numbers attending Independent boarding schools.**

The data review also examined data on indigenous boarders and full fee-paying overseas students (FFPOS) to assess any impact that these subsets of boarders have on students staying at Independent boarding schools.

ANALYSIS NOTES 2

2.1 DATA SOURCES

2.1.1 BOARDING SCHOOLS – AUSTRALIAN WIDE DATA

There is no single source of data on the number of boarding facilities and boarding places by education sector and state/territories. The Australian Boarding Schools Association (ABSA) has membership from all sectors of schooling. Using the data on boarding facilities found on the ABSA 'find a school' list and matching it to a list of schools from Australian Curriculum, Assessment and Reporting Authority (ACARA) MySchool dataset, an analysis can be made of the number of boarding facilities and indicative boarding places available across sectors and states/territories.

The number of non-government boarding facilities in the ABSA list (176) is comparable with the number of boarding schools in:

- the Independent sector as listed on the Department of Education, Skills and Employment (DESE) Non-Government School Census (155); and
- the Catholic sector contained in the National Catholic Education Commission (NCEC) report on Australian Catholic Schools 2019 (38).

Similarly, the indicative number of non-government boarding places available on the ABSA list (20,316) is also comparable with the actual 2018 boarding student numbers (19,181) found in NCEC and Independent sector data.

2.1.2 BOARDING SCHOOLS – INDEPENDENT SECTOR SPECIFIC DATA

The Independent sector specific data that was reviewed was drawn from:

— DESE Non-Government School Census for school details, the numbers of student enrolments and boarders over the period 2011 to 2020. The DESE Non-Government School Census was also used for data on Indigenous boarders but this data is only for the period 2014 to 2020;

— DESE Financial Questionnaire for the income and expenses reported by each boarding school in 2019; and

— ACARA MySchool data for boarding school geolocations.

2.2 SECTOR CLASSIFICATION

The data review **includes** independent Catholic schools as part of the Independent sector.

2.3 DATA INCONSISTENCIES

The DESE Non-Government School Census data of 2020 classifies eight schools as being non-boarding schools even though:

— the schools report having boarding students in the Non-Government School Census;

— the website of each school state that boarding facilities are available at the school; and

— the ABSA lists the schools as boarding schools.

For these reasons, these eight schools have been counted in this review as schools with boarding facilities.

Similarly, the DESE Non-Government School Census data categorises nine schools as boarding schools even though the schools have not reported any boarding students between 2011 and 2020. These schools have been included as the boarding students at these schools may be using residential boarding facilities or sharing boarding facilities located at other schools.

2.4 ENROLMENT CLASSIFICATION

All Independent sector enrolment figures used in this report refer to Full Time Equivalent (FTE) enrolments and include full fee-paying overseas students.

2.5 PERIOD COVERED BY THE DATA REVIEW

This data review has used the Independent sector school and enrolment statistics for the period 2011 to 2020. Prior to 2011 the DESE Non-Government School Census data did not include data on the number of boarders at Independent schools.

All the statistics are based on historical data for the boarding schools that are included in DESE's Non-Government School Census of 2020. This means that any school that closed before 2020 is not included.

This data review uses the latest available financial information (2019).

2.6 TERMS USED

The term 'boarding facility' is used throughout this report as:

— there are some boarding facilities that are not associated with an individual school but provide boarding facilities for students who attend any one of several schools in an area. An example of these shared boarding facilities are the government residential colleges in Western Australia who provide boarding facilities for students from several schools and sectors;

— existing schools may open and close their boarding facilities without it impacting on the school's status as an ongoing school.

Shared boarding facilities are mostly confined to the government and Catholic sectors in Queensland and Western Australia. In the Independent sector, boarding facilities are mostly co-located at and associated with an individual school.

FINDINGS 3

3.1 BOARDING FACILITIES AND STUDENTS ACROSS ALL SECTORS IN AUSTRALIA

As there is no single source of authenticated data on the number of boarding facilities covering all education sectors, the ABSA 'find a school' list has been used to show a comparative number of boarding facilities and indicative boarding places across sectors and the states.

Analysis of the ABSA list shows there are almost 210 schools (2.2 per cent of all Australian schools) using boarding facilities in Australia and those boarding facilities provide accommodation for over 23,000 boarders (0.6 per cent of all students attending Australian schools). Most of the boarding facilities are co-located and associated with a single school but there are examples of facilities providing accommodation for boarding students who may attend one of several schools within an area. These shared boarding facilities are mostly in the government sector in Queensland and Western Australia.

TABLE 1. NUMBER AND PERCENTAGE OF SCHOOLS USING BOARDING FACILITIES, BY SECTOR AND STATE, USING THE ABSA 'FIND A SCHOOL' LIST.

	INDEPENDENT		CATHOLIC		GOVERNMENT		AUSTRALIA
	NO.	%	NO.	%	NO.	%	NO.
NSW	40	87%	3	7%	3	7%	46
VIC	24	83%	5	17%	0	0%	29
QLD	34	61%	16	29%	6	11%	56
SA	9	56%	5	31%	2	13%	16
WA	17	37%	11	24%	18	39%	46
TAS	6	100%	0	0%	0	0%	6
NT	3	43%	1	14%	3	43%	7
ACT	2	100%	0	0%	0	0%	2
TOTAL	**135**	**65%**	**41**	**20%**	**32**	**15%**	**208**

Table 1 shows that the Independent school sector has the largest number of schools using boarding facilities in Australia (135 or 65%). The states with the greatest number of schools using boarding facilities are Queensland (56 schools) then NSW and Western Australia (46 schools). There is a striking difference between the sectors in these three states. In NSW, most schools using boarding facilities are in the Independent sector, in Queensland most schools using boarding facilities are in the non-government sector and in Western Australia there is a much more even spread of schools between the three sectors.

The Catholic sector has most of its schools which use boarding facilities in Queensland (16 or 39%) and Western Australia (11 or 27%). Western Australia also has 18 government schools using boarding facilities, over half of all the government schools in Australia using boarding facilities.

TABLE 2. PERCENTAGE OF SCHOOLS WITH A BOARDING FACILITY BY STATE AND SECTOR

	INDEPENDENT		CATHOLIC		GOVERNMENT		AUSTRALIA	
	NO.	%	NO.	%	NO.	%	NO.	%
NSW	400	10.0%	550	0.5%	2,157	0.1%	3,107	1.5%
VIC	219	11.0%	498	1.0%	1,537	0.0%	2,254	1.3%
QLD	222	15.3%	307	5.2%	1,241	0.5%	1,770	3.2%
SA	109	8.3%	96	5.2%	510	0.4%	715	2.2%
WA	147	11.6%	162	6.8%	799	2.3%	1,108	4.2%
TAS	33	18.2%	38	0.0%	191	0.0%	262	2.3%
NT	20	15.0%	18	5.6%	152	2.0%	190	3.7%
ACT	19	10.5%	29	0.0%	88	0.0%	136	1.5%
TOTAL	**1,169**	**11.5%**	**1,698**	**2.4%**	**6,675**	**0.5%**	**9,542**	**2.2%**

Table 2 shows that the Independent sector has the greatest percentage of schools with a boarding facility with Tasmania having the highest percentage of boarding schools (18.2%). Of the 33 Independent schools in Tasmania, six have boarding facilities. The Government sector has the lowest percentage of schools with boarding facilities.

TABLE 3 INDICATIVE NUMBER OF AVAILABLE BOARDING PLACES IN THE ABSA 'FIND A SCHOOL' LIST BY STATE AND SECTOR

	INDEPENDENT		CATHOLIC		GOVERNMENT		AUSTRALIA
	NO.	%	NO.	%	NO.	%	NO.
NSW	5,398	83%	353	5%	749	12%	6,500
VIC	2,773	90%	320	10%	0	0%	3,093
QLD	4,192	61%	2,251	33%	396	6%	6,839
SA	814	68%	321	27%	63	5%	1,198
WA	1,849	42%	1,063	24%	1,524	34%	4,437
TAS	280	100%	0	0%	0	0%	280
NT	414	69%	107	18%	77	13%	598
ACT	181	100%	0	0%	0	0%	181
TOTAL	**15,901**	**69%**	**4,415**	**19%**	**2,809**	**12%**	**23,125**

Table 3 shows that the Independent sector has the highest number of available places at boarding facilities (15,901) and provides more than double the available places in the other two sectors combined. The states with the highest number of available boarding places are Queensland (6,839 or 30%), NSW (6,500 or 28%) and Western Australia (4,437 or 19%).

The states with the highest number of available boarding places in the Independent sector are NSW (5,398) and Queensland (4,192). The Catholic sector has the greatest number of its available boarding places in Queensland (2,251) and Western Australia (1,063). The government sector has the majority of its available boarding places in Western Australia (1,524).

TABLE 4. INDICATIVE NUMBER OF AVAILABLE BOARDING PLACES PER SCHOOL BY STATE

	AUSTRALIA		
	NO. OF SCHOOLS	NO. OF AVAILABLE PLACES	AVERAGE PLACES AVAILABLE PER SCHOOL
NSW	46	6,500	141
VIC	29	3,093	107
QLD	56	6,839	122
SA	16	1,198	75
WA	46	4,437	96
TAS	6	280	47
NT	7	598	85
ACT	2	181	91
TOTAL	**208**	**23,125**	**111**

Table 4 shows that the largest boarding facilities on average are in NSW (141), Queensland (122) and Victoria (107). Western Australia, while having the second largest number of schools with boarding facilities, has on average much smaller boarding facilities (96) compared to the three largest states. This could be due to the number of regional residential boarding facilities that are shared by both the government and Catholic sectors.

3.2 BOARDING FACILITIES AND STUDENTS IN THE INDEPENDENT SECTOR

In 2020 the Independent sector has 155* schools catering for 149,800 students providing boarding facilities for 14,565 of those students. In the Independent sector, boarding facilities are nearly always co-located with an individual school.

There are six Independent schools where all the students are boarding. These are all entirely Indigenous boarding schools. There are a further six Independent schools where more than 50% of the students are boarding at the school with two of those schools being largely indigenous boarding schools.

The Independent sector is a large provider of boarding facilities for Indigenous students. Of the 14,565 Independent boarding students in 2020, over 2,100 are Indigenous boarders attending 120 Independent schools.

To investigate the growth in the boarding facilities provided by Independent schools, a review of school and enrolment data from 2011 to 2020 has been undertaken. This review examines growth based on specific boarding facility characteristics being:

— state/territory;

— school geolocation;

— gender composition;

— boarding fee income received by the school (using the latest available financial data); and

— school size.

TABLE 5. NUMBER AND SIZE OF INDEPENDENT BOARDING FACILITIES AND ASSOCIATED BOARDING SCHOOLS – 2020

	NO. OF INDEPENDENT BOARDING FACILITIES	BOARDERS AT THE INDEPENDENT BOARDING FACILITY	AVERAGE SIZE OF BOARDING FACILITY	STUDENTS AT ASSOCIATED INDEPENDENT BOARDING SCHOOL	AVERAGE SIZE OF THE BOARDING SCHOOL
NSW	48	4,947	103	47,364	987
VIC	27	2,403	89	34,058	1,261
QLD	34	3,736	110	30,939	910
SA	10	896	90	10,274	1,027
WA	22	1,773	81	16,834	765
TAS	6	203	34	5,053	842
NT	6	463	77	2,093	349
ACT	2	144	72	3,161	1,581
TOTAL	**155***	**14,565**	**94**	**149,776**	**966**

Table 5 shows the average size of boarding facilities in the Independent sector in 2020 with the largest facilities in Queensland. The ACT has on average the largest schools with boarding facilities.

*The number of 155 Independent boarding schools quoted above, is accurate. It identifies 20 more schools than the ASBA list used in the earlier part of this review. The ASBA list includes boarding facilities across all three sectors and is the only available list that allows comparative assessment between the school sectors in Australia.

3.3 GROWTH IN INDEPENDENT BOARDING SCHOOLS - NATIONAL

Nationally, enrolment growth at all Independent schools between 2011 and 2020 was 17.3% or an additional 115,190 enrolments. This growth includes an additional 172 schools.

Over the same period, enrolments in Independent schools with boarding facilities increased by 8,301 (5.9%), the number of boarding facilities increased by 15 (10.7%) while the boarding population **decreased** by 1,086 (-6.9%).

TABLE 6. INDEPENDENT SCHOOL AND ENROLMENT GROWTH COMPARED TO INDEPENDENT BOARDING SCHOOLS, BOARDER AND ENROLMENT GROWTH, 2011 AND 2020.

			GROWTH 2011 TO 2020	
	2011	**2020**	**NO.**	**%**
ALL INDEPENDENT SCHOOLS (NO.)	997	1,169	172	17.3%
ALL STUDENTS IN INDEPENDENT SCHOOLS (FTE)	532,181	647,371	115,190	21.6%
INDEPENDENT BOARDING FACILITIES (NO.)	140	155	15	10.7%
BOARDERS IN INDEPENDENT SCHOOLS (FTE)	15,651	14,565	-1,086	-6.9%
INDEPENDENT BOARDING SCHOOL ENROLMENTS (FTE)	141,475	149,776	8,301	5.9%

Table 6 shows that the growth in the number of new boarding facilities in the Independent sector between 2011 and 2020 (10.7%) is below the growth in the number of new Independent schools across Australia (17.3%) over the same period. Similarly, student enrolment growth of 5.9% at Independent boarding schools between 2011 and 2020, is also well below the national enrolment growth at Independent schools of 21.6% over the same period.

While the number of Independent boarding schools and the total enrolments in these schools has been growing between 2011 and 2020, albeit at much slower rate than the overall growth in the Independent sector, boarder numbers over that period have decreased by 1,086 or -6.9% with most of that decrease occurring between 2019 and 2020.

CHART 1. INDEPENDENT SCHOOL BOARDER GROWTH, 2011 TO 2020

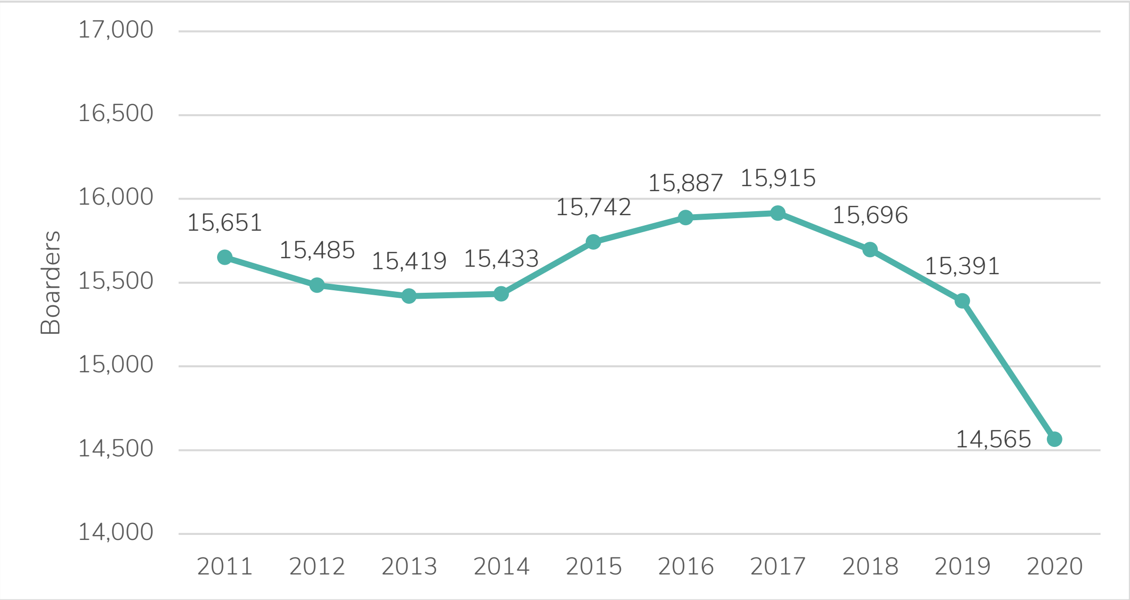


Chart 1 shows the number of boarders at Independent schools reducing between 2011 and 2013 before growing again to peak at 15,915 in 2017. Since 2017 boarder numbers have fallen to 14,565, a reduction of -6.9% since 2011.

It should be noted that between 2011 and 2019 the number of boarders only decreased by 260 (-1.7%). The large fall in boarder numbers between 2019 and 2020 (-5.4%) accounts for most of the reduction in boarders between 2011 and 2020. The most likely reason for the reduction in boarder numbers, especially between 2019 and 2020, is COVID-19 restrictions but the fall continues a downward trend seen since 2017.

3.4 INDEPENDENT BOARDING SCHOOL GROWTH BY STATE AND TERRITORY

TABLE 7. INDEPENDENT BOARDING SCHOOLS AND FACILITIES - BOARDERS AND ENROLMENTS, BY STATE, 2011 AND 2020.

	NO. OF INDEPENDENT BOARDING FACILITIES (2020)	% OF INDEPENDENT SCHOOLS IN THE STATE WITH BOARDING FACILITIES	BOARDERS AT INDEPENDENT BOARDING FACILITIES				ENROLMENTS AT INDEPENDENT BOARDING SCHOOLS			
					GROWTH				GROWTH	
			2011	2020	NO.	%	2011	2020	NO.	%
NSW	48	12.0%	5,342	4,947	-395	-7.4%	40,876	47,364	6,488	15.9%
VIC	27	12.3%	2,635	2,403	-232	-8.8%	32,062	34,058	1,996	6.2%
QLD	34	15.3%	3,837	3,736	-101	-2.6%	30,886	30,939	53	0.2%
SA	10	9.2%	930	896	-34	-3.7%	10,021	10,274	253	2.5%
WA	22	15.0%	1,836	1,773	-63	-3.4%	17,215	16,834	-381	-2.2%
TAS	6	18.2%	289	203	-86	-29.8%	5,105	5,053	-52	-1.0%
NT	6	30.0%	632	463	-169	-26.7%	2,382	2,093	-289	-12.1%
ACT	2	10.5%	150	144	-6	-4.0%	2,928	3,161	233	7.9%
TOTAL	**155**	**13.3%**	**15,651**	**14,565**	**-1,086**	**-6.9%**	**141,475**	**149,776**	**8,301**	**5.9%**

Table 7 shows that there has been a reduction in the number of boarders in Independent boarding schools across all states and territories between 2011 and 2020 with the largest falls in Tasmania (-29.8%) and the Northern Territory (-26.7%). The Northern Territory also had the largest fall in total student enrolments at Independent boarding schools (-12.1%) with New South Wales recording the largest increase in enrolments at Independent boarding schools (15.9%).

Between 2011 and 2020 there were four new Independent schools opened that have boarding facilities, two new schools in Western Australia and one each in Queensland and Victoria. Also, eleven new boarding facilities were established in existing Independent schools, four in Queensland, two each in Victoria and Western Australia and one in New South Wales, South Australia and the Northern Territory. However, the increase in Independent boarding schools and facilities in those states was not enough to offset the reduction in boarders in those states.

3.5 INDEPENDENT BOARDING SCHOOL GROWTH BY GEOLOCATION

TABLE 8. INDEPENDENT BOARDING SCHOOLS AND FACILITIES - BOARDERS AND ENROLMENTS, BY GEOLOCATION, 2011 AND 2020.

	NO. OF INDEPENDENT BOARDING FACILITIES (2020)	% OF INDEPENDENT SCHOOLS WITH BOARDING FACILITIES	BOARDERS AT INDEPENDENT BOARDING FACILITIES				ENROLMENTS AT INDEPENDENT BOARDING SCHOOLS			
					GROWTH				GROWTH	
			2011	2020	NO.	%	2011	2020	NO.	%
MAJOR CITIES	91	58.6%	9,608	9,102	-506	-5.3%	107,404	114,567	7,163	6.7%
INNER REGIONAL	41	26.5%	4,282	3,750	-532	-12.4%	25,045	26,253	1,207	4.8%
OUTER REGIONAL	15	9.7%	1,319	1,206	-113	-8.6%	7,920	7,555	-365	-4.6%
REMOTE	4	2.6%	325	285	-40	-12.3%	919	1,097	178	19.3%
VERY REMOTE	4	2.6%	117	222	105	89.7%	186	304	118	63.4%
TOTAL	**155**	**100%**	**15,651**	**14,565**	**-1,086**	**-6.9%**	**141,475**	**149,776**	**8,301**	**5.9%**

ACARA has given a geographical classification to each Independent school based on the school's location. The classification is based on the Australian Bureau of Statistics (ABS) remoteness classifications (Major Cities, Inner Regional, Outer Regional, Remote, Very Remote). See https://www.abs.gov.au/websitedbs/d3310114.nsf/home/remoteness+structure for details on how the ABS classifies the remoteness of areas based on a measure of the relative access to services.

Table 8 shows that there has been a reduction in boarders in Independent schools in all geographical locations in Australia except in areas classified as Very Remote.

Of the four new Independent schools with boarding facilities established since 2011, one is in the area classified as Major Cities and one is in the area classified as Outer Regional. These new Independent schools have not been enough to stop the decrease in boarder numbers in those locations. Two of the new Independent boarding schools are in areas classified as Very Remote. These two new schools help to explain the large growth in both boarder numbers and enrolments in Very Remote areas.

The eleven new Independent boarding facilities established at existing schools since 2011 are in the areas classified as Major Cities (6), Inner Regional (1), Outer Regional (3) and Remote (1).

3.6 INDEPENDENT BOARDING SCHOOL GROWTH BY GENDER COMPOSITION

TABLE 9. INDEPENDENT BOARDING SCHOOLS - BOARDERS AND ENROLMENTS, BY SCHOOL GENDER COMPOSITION, 2011 AND 2020.

	NO. OF INDEPENDENT BOARDING FACILITIES (2020)	BOARDERS AT INDEPENDENT BOARDING FACILITIES				ENROLMENTS AT INDEPENDENT BOARDING SCHOOLS			
				GROWTH				GROWTH	
		2011	2020	NO.	%	2011	2020	NO.	%
CO-ED	87	7,369	6,882	-487	-6.6%	67,364	69,547	2,184	3.2%
FEMALE	42	3,884	3,639	-245	-6.3%	38,078	40,032	1,954	5.1%
MALE	26	4,398	4,044	-354	-8.0%	36,033	40,197	4,163	11.6%
TOTAL	**155**	**15,651**	**14,565**	**-1,086**	**-6.9%**	**141,475**	**149,776**	**8,301**	**5.9%**

Table 9 shows that there has been a reduction in the number of boarders at Independent schools regardless of the gender composition of the boarding school.

Male only Independent boarding schools show a greater than average growth in total enrolments compared to all other Independent boarding schools despite the reduction in boarder numbers.

Of the four new Independent boarding schools established since 2011, one is a new female only boarding school and the other three are co-educational boarding schools. All the eleven new Independent boarding facilities established at existing schools since 2011 are co-educational facilities.

3.7 INDEPENDENT BOARDING SCHOOL GROWTH BY BOARDING FEE INCOME

TABLE 10. INDEPENDENT BOARDING SCHOOLS - BOARDERS AND ENROLMENTS, BY BOARDING INCOME (IN 2019), 2011 AND 2020.

	NO. OF INDEPENDENT BOARDING FACILITIES (2020)	BOARDERS AT INDEPENDENT BOARDING FACILITIES				ENROLMENTS AT INDEPENDENT BOARDING SCHOOLS			
				GROWTH				GROWTH	
		2011	2020	NO.	%	2011	2020	NO.	%
$1 TO $5K	2	26	64	38	146.2%	217	217	0	0.0%
$5K TO $10K	8	866	815	-51	-5.9%	5,824	5,616	-208	-3.6%
$10K TO $15K	19	1,759	1,669	-90	-5.1%	11,072	12,291	1,219	11.0%
$15K TO $20K	39	5,082	4,601	-481	-9.5%	33,174	34,740	1,566	4.7%
$20K TO $25K	53	5,187	4,819	-368	-7.1%	54,826	58,209	3,383	6.2%
$25K TO $30K	13	1,673	1,441	-232	-13.9%	16,618	18,033	1,415	8.5%
$30K TO $35K	4	155	188	33	21.3%	6,155	6,461	306	5.0%
OVER $35K	3	867	826	-41	-4.7%	5,565	5,750	185	3.3%
NO INCOME REPORTED	14	36	142	106	294.4%	8,025	8,460	435	5.4%
TOTAL	**155**	**15,651**	**14,565**	**-1,086**	**-6.9%**	**141,475**	**149,776**	**8,301**	**5.9%**

Table 10 shows that boarder growth in Independent schools has been restricted to the two schools that make up the lowest boarder income grouping ($1 to $5k) despite there being no overall enrolment growth at those schools. Boarder growth has been negligible or negative at all the other schools, regardless of the boarding income groupings.

There were 14 Independent boarding schools which reported no boarder income for 2019. This is because the schools only opened their boarding facilities in 2020 or have closed their boarding facilities since 2011. Also, a number of these schools have only sporadically reported having boarders between 2011 and 2020. These 14 'No income reported' Independent boarding schools have been included to ensure the tables in this Review are consistent.

Of the four new Independent boarding schools established since 2011 and four new Independent boarding facilities at existing schools, there are two in the boarding income grouping of '$10-$15k', one in the income grouping of '$20-$25k' and one that has 'No income reported'.

The eleven new Independent boarding facilities established at existing schools since 2011 are spread across the boarding income groups with three having boarder income of '$15k-$20K' and two having boarder income of 'Over 30k'. The rest are in the boarder income groupings of '$1-$5k' (1), '$10k-$15k (2), '$20k-$25k' (1) and two Independent boarding schools reporting 'No income reported'.

3.8 INDEPENDENT BOARDING SCHOOL GROWTH BY SCHOOL SIZE

TABLE 11. INDEPENDENT BOARDING SCHOOLS - BOARDERS AND ENROLMENTS, BY SIZE OF THE BOARDING POPULATION IN 2020, 2011 AND 2020.

	NO. OF INDEPENDENT BOARDING FACILITIES (2020)	BOARDERS AT INDEPENDENT BOARDING FACILITIES				ENROLMENTS AT INDEPENDENT BOARDING SCHOOLS			
				GROWTH				GROWTH	
		2011	2020	NO.	%	2011	2020	NO.	%
1-50	44	1,319	1,284	-35	-2.7%	31,009	32,444	1,435	4.6%
50-100	45	4,169	3,354	-815	-19.5%	44,556	45,942	1,386	3.1%
100-150	29	3,752	3,494	-258	-6.9%	30,279	31,237	958	3.2%
150-200	13	2,103	2,276	173	8.2%	13,894	16,143	2,249	16.2%
200-250	3	615	701	86	14.0%	2,156	2,546	390	18.1%
250-300	1	287	258	-29	-10.1%	1,092	1,196	104	9.5%
300-350	5	1,499	1,553	54	3.6%	6,943	7,604	661	9.5%
350 AND ABOVE	3	1,830	1,645	-185	-10.1%	3,917	4,337	420	10.7%
NOT REPORTED	12	77	0	-77	-100%	7,629	8,327	698	9.1%
TOTAL	155	15,651	14,565	-1,086	-6.9%	141,475	149,776	8,301	5.9%

Table 11 shows that growth in boarder numbers between 2011 and 2020 varies across Independent boarding schools of different sizes. The greatest growth in boarder numbers have been in the sixteen Independent boarding schools with 150 to 250 boarders (9.5%). There has also been a small growth in boarder numbers at the three schools that have 300 to 350 boarders.

There were 12 Independent boarding schools that reported no boarders for 2020. This could be a result of incorrect reporting, having no boarders due to travel restrictions in 2020 or that the boarding school has closed the school's boarding facility since 2011. The 12 Independent boarding schools have been included to ensure the tables in this Review are consistent.

Of the four new Independent boarding schools established since 2011 and the eleven new Independent boarding facilities at existing schools, most are very small boarding facilities of between 1 to 50 boarders except for one facility which has a boarding population between 50 to 100 boarders.

3.9 BOARDING SCHOOL GROWTH – TOP AND BOTTOM 10 INDEPENDENT BOARDING SCHOOLS

TABLE 12. TOP 10 INDEPENDENT BOARDING SCHOOLS AS MEASURED BY THE INCREASE IN BOARDERS BETWEEN 2011 AND 2020.

SCHOOL NAME	STATE	BOARDING INCOME CATEGORY	BOARDERS AT INDEPENDENT BOARDING FACILITIES				ENROLMENTS AT INDEPENDENT BOARDING SCHOOLS			
					GROWTH				GROWTH	
			2011	2020	NO.	%	2011	2020	NO.	%
CALROSSY ANGLICAN SCHOOL	NSW	$15-$20K	14	179	165	1179%	497	868	371	75%
DALBY CHRISTIAN COLLEGE	QLD	$10-15K	7	24	17	243%	207	347	140	68%
RAVENSWOOD SCHOOL FOR GIRLS	NSW	$30-35K	18	34	16	89%	1,085	1,309	224	21%
GREAT SOUTHERN GRAMMAR	WA	$20-25K	70	117	47	67%	684	671	-13	-2%
BRISBANE BOYS COLLEGE	QLD	$15-20K	97	146	49	51%	1,570	1,440	-130	-8%
TIWI COLLEGE	NT	$5-10K	80	116	36	45%	92	137	45	49%
PRESBYTERIAN LADIES' COLLEGE	WA	$20-25K	105	147	42	40%	1,142	1,001	-141	-12%
ST HILDA'S SCHOOL	QLD	$15-20K	123	172	49	40%	1,162	1,108	-54	-5%
THE SOUTHPORT SCHOOL	QLD	$10-15K	233	317	84	36%	1,365	1,603	238	17%
TRINITY GRAMMAR SCHOOL	VIC	> $40K	13	17	4	31%	1,316	1,478	162	12%

Table 12 shows the top ten Independent boarding schools as measured by the percentage growth in boarders at the school between 2011 and 2020. Along with the highest percentage of growth in boarder numbers, three of the schools also have higher enrolment growth than average across all Independent schools. It is also notable that four of the schools listed above had an overall enrolment decrease.

Table 12 also shows that these top ten Independent boarding schools are represented in most of the boarding income groupings except for the '$0-5k' and '$25-30k' groupings.

TABLE 13. BOTTOM 10 INDEPENDENT BOARDING SCHOOLS AS MEASURED BY THE DECREASE IN BOARDERS BETWEEN 2011 AND 2020.

SCHOOL NAME	STATE	BOARDING INCOME CATEGORY	BOARDERS AT INDEPENDENT BOARDING FACILITIES				ENROLMENTS AT INDEPENDENT BOARDING SCHOOLS			
					GROWTH				GROWTH	
			2011	2020	NO.	%	2011	2020	NO.	%
BUNBURY CATHEDRAL GRAMMAR SCHOOL	WA	$15-20K	107	59	-48	-45%	914	626	-288	-32%
ST STANISLAUS COLLEGE	NSW	$10-15K	186	95	-91	-49%	607	538	-69	-11%
FAHAN SCHOOL	TAS	$15-20K	22	11	-11	-50%	337	403	66	20%
HUNTINGTOWER SCHOOL	VIC	$20-25K	15	7	-8	-53%	557	720	163	29%
ST VINCENT'S COLLEGE	NSW	$20-25K	87	38	-49	-56%	596	707	111	19%
LAUNCESTON CHURCH GRAMMAR SCHOOL	TAS	$15-20K	80	32	-48	-60%	741	773	32	4%
THE KOORALBYN INTERNATIONAL SCHOOL	QLD	$5-10K	23	8	-15	-65%	221	341	120	54%
CONCORDIA LUTHERAN COLLEGE	QLD	$15-20K	107	37	-70	-65%	801	559	-242	-30%
HAILEYBURY RENDALL SCHOOL	NT	$15-20K	240	73	-167	-70%	905	626	-279	-31%
TRINITY GRAMMAR SCHOOL	NSW	$25-30K	41	0	-41	-100%	1,912	2,158	246	13%

Table 13 shows the bottom ten Independent boarding schools as measured by the percentage growth in boarders at the school between 2011 and 2020. One school has reported no boarders for 2020. Despite recording the lowest percentage growth in boarder numbers, 60%of the schools have positive total enrolment growth with two schools recording enrolment growth above the average for all Independent schools. 40 % of schools have recorded negative enrolment growth with three of those schools recording an enrolment drop of 30% or more.

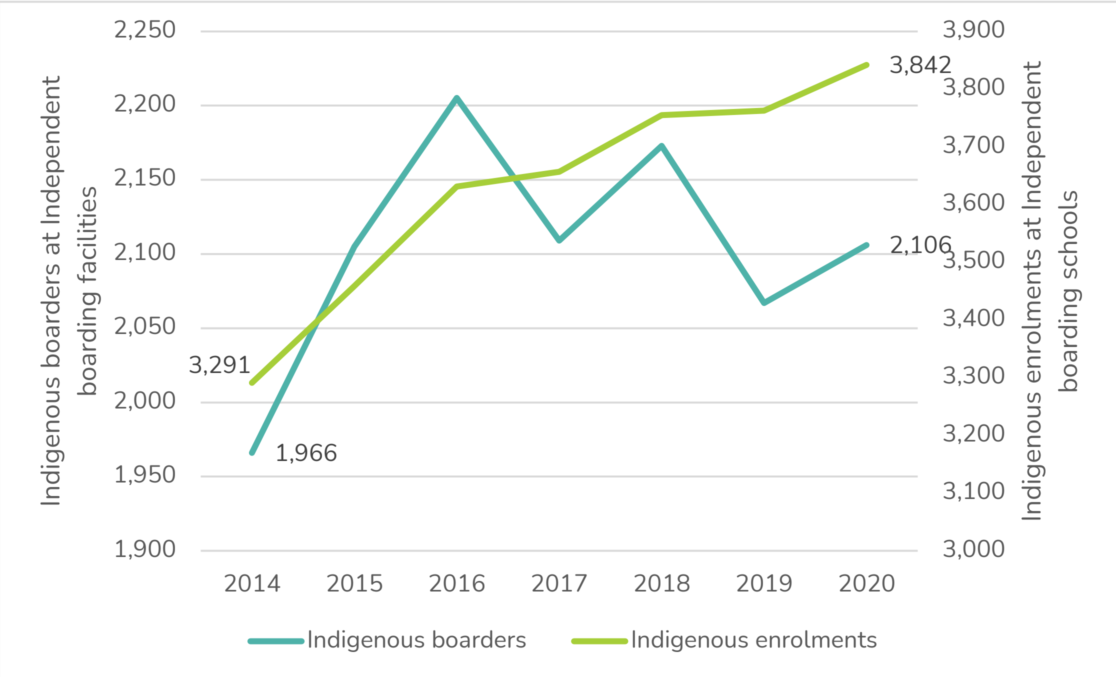
Table 13 also shows that these bottom ten Independent boarding schools, are represented in all the boarding income groupings except for the ‘$0-5k’ grouping.

3.10 INDEPENDENT BOARDING SCHOOL GROWTH BY INDIGENOUS STUDENTS AND BOARDERS

TABLE 14. INDEPENDENT BOARDING SCHOOLS - INDIGENOUS BOARDERS BY STATE, 2014 AND 2020.

	NO. OF INDEPENDENT BOARDING FACILITIES	INDIGENOUS BOARDERS AT INDEPENDENT BOARDING FACILITIES			
				GROWTH 2014 TO 2020	
		2014	2020	NO.	%
NSW	35	369	390	21	5.7%
VIC	15	149	143	-6	-4.0%
QLD	30	492	642	150	30.5%
SA	8	76	70	-6	-7.9%
WA	20	355	393	38	10.7%
TAS	4	6	6	0	0.0%
NT	6	510	447	-63	-12.4%
ACT	2	9	15	6	66.7%
TOTAL	**120**	**1,966**	**2,106**	**140**	**7.1%**

CHART 2. INDEPENDENT BOARDING SCHOOLS - INDIGENOUS BOARDERS AND INDIGENOUS ENROLMENTS, 2014 TO 2020.



DESE has only provided separate data on Indigenous boarders since 2014 although they have been included in the total Independent boarder numbers since 2011.

Indigenous boarders attending Independent boarding schools have increased from 1,966 boarders attending 104 boarding schools in 2014 to 2,106 boarders attending 120 boarding schools in 2020. In 2020 indigenous boarders were 14.5% of all boarders using Independent school boarding facilities.

Table 14 shows that growth in Indigenous boarders between 2014 and 2020 (6.7%) has occurred in most states. This compares to the negative growth in all Independent boarders using Independent boarding facilities over the same period (-7.0%). Interestingly, the state with the lowest growth is the Northern Territory (-12.4). This negative growth follows the same trend as shown in Table 7 where the Northern Territory had one of the largest reductions in the number of boarders in Independent schools in percentage terms between 2011 and 2020.

Chart 2 shows that the number of Indigenous boarders varied from year to year between 2014 and 2020. This variability in Indigenous boarder numbers is not reflected in the Indigenous enrolment numbers at Independent boarding schools over the same period which reflects increased growth each year from 2014.

3.11 IMPACT ON INDEPENDENT BOARDING SCHOOL GROWTH BY FULL FEE PAYING OVERSEAS STUDENTS

In 2020 there were 6,630 overseas students attending Independent schools. Of those overseas students, 2,664 (40%) attended a boarding school and 3,966 (60%) attended non-boarding schools.

If it is assumed that all overseas students that attend a boarding school are boarding at that schools' boarding facility, then overseas students would make up 19% of all boarders at Independent schools and that the drop in overseas students from 2019 to 2020 (12.8%) could have contributed to the large fall in boarding student number between 2019 and 2020 as seen in Chart 1.

It cannot be determined from the data provided in the DESE Non-Government School Census whether the number of boarders at a boarding school include overseas students or whether the overseas students are boarding elsewhere.

The interaction between the number of local student and overseas students using Independent school boarding facilities needs further investigation.

3.12 INDEPENDENT BOARDING SCHOOL FINANCIAL ANALYSIS

3.12.1 FINANCIAL REPORTING REQUIREMENTS FOR NON-GOVERNMENT SCHOOLS OFFERING BOARDING FACILITIES

When a school submits financial data for the annual DESE Financial Questionnaire there are two general information questions that need to be answered that pertain to non-government schools offering boarding facilities.

The first question is 'Was the school a boarding school at any stage during the previous calendar year? (yes/no)'. In 2019 140 Independent schools indicated in the Financial Questionnaire that they offered boarding facilities.

The second question is 'Are separate accounts maintained for boarding school activities? (yes/no)'. For the Financial Questionnaire it is a requirement for all non-government schools offering boarding facilities to either provide separate day school (tuition) and boarding facility (boarding) financial data or use an apportionment method that allows for the reasonable separation of income and expenditure data. If a school does not maintain separate tuition and boarding accounts, then the boarding amounts must be calculated using the apportionment method.

The Financial Questionnaire guidelines state that the maximum proportion of expenses to be allocated to boarding is 60 per cent. If the proportion for boarding expenses exceeds the 60 per cent upper limit, apportion the expenses as follows:

- tuition: 40 per cent
- boarding: 60 per cent

3.12.2 BOARDING SCHOOLS - FINANCIAL ANALYSIS METHODOLOGY

In analysing the financial circumstances of Independent boarding schools, the latest Financial Questionnaire data (2019) was used. The Financial Questionnaire data for each school was mapped to the relevant Australian Charities and Not-for-profits Commission (ACNC) financial information categories. This mapping produced an Income Statement and a Balance Sheet for the school as a whole (tuition and boarding) and a separate Income Statement for any boarding facility.

Of the 140 Independent schools offering boarding facilities in 2019, 43 schools report as having separate tuition and boarding accounts, 96 schools did not have separate accounts and used the apportionment method to split income and expenditure data and one school did not respond to this question and is assumed not to have separate accounts.

This financial analysis uses the Income Statement of individual Independent boarding schools and highlights those boarding schools that have a negative Income Statement (a loss) in 2019 as a possible indicator of financial stress for the boarding school or facility. The financial analysis does not take Capital expenditure into account because:

- annual consumption of Capital facilities is reflected as a depreciation expense which is included in the Income Statement; and
- expenditure on Capital items increases assets and if funded using a bank loan, increases liabilities which are reflected in the Balance Sheet.

The boarding facility Income Statements were reviewed for those schools who kept separate boarding facility accounts (43 boarding facilities). The Income Statement for the whole school, both day school and boarding facility, were reviewed for those boarding schools who did not keep separate accounts (97 schools). The reason for reviewing different Income Statements for schools that have different financial treatment for their boarding facilities is that for schools which did **not** keep separate boarding facility accounts, the amount apportioned to the boarding facility was notional and may not a true reflection of the costs of the boarding facility.

It should be noted that for 2019 most of the 140 Independent boarding schools had positive Balance Sheets even though many had negative Income Statements. One school had a negative Balance Sheet but a positive Income Statement and eight schools recorded no Balance Sheet amounts.

3.12.3 IMPACT OF COVID-19

This analysis uses financial data from 2019 which was prior to any COVID-19 impacts. As can be seen from Chart 1, there was a large drop in boarders between 2019 and 2020 (-5.4%) so it could be anticipated that more Independent boarding schools could have negative Income Statements in 2020 and future years.

3.12.4 FINANCIAL ANALYSIS

The following tables, 16 and 17, shows the number and percentage of boarding schools with negative Income Statements. The tables have been separated into those schools who had separate boarding facility accounts and those school who did not. The tables also show the number of boarding schools with negative Income Statements by state and location to identify any trends.

Table 18 summarises the data contained in Tables 16 and 17 to provide a complete picture on the status of Income Statement for all boarding schools and facilities for 2019.

TABLE 16. BOARDING SCHOOLS WITH SEPARATE ACCOUNTS BY STATE AND GEOLOCATION – 2019

		BOARDING FACILITIES ONLY WITH NEGATIVE INCOME STATEMENTS				
	TOTAL BOARDING FACILITIES	MAJOR CITIES	REGIONAL	REMOTE	TOTAL NO.	TOTAL %
NSW	9	4	3	0	7	78%
VIC	9	3	1	0	4	44%
QLD	14	3	7	0	10	71%
SA	2	1	0	0	1	50%
WA	4	2	0	0	2	50%
TAS	2	0	2	0	2	100%
NT	1	0	0	1	1	100%
ACT	2	2	0	0	2	100%
TOTAL	**43**	**15**	**13**	**1**	**29**	**67%**

Table 16 shows that 29 (67%) Independent schools boarding facilities that kept separate accounts have negative Income Statements in 2019. The losses these facilities made in 2019 range from $6,000 to $1.619 million. The total loss suffered across all the 29 boarding facilities is $13.201 million.

The largest number of Independent boarding facilities with negative Income Statements are in Queensland (10 boarding facilities or 71% of facilities in that state) with the majority being in areas classified as Regional. The next largest number of Independent boarding facilities with negative Income Statements is in NSW (7 facilities or 78% of all facilities in that state) with four located in areas classified as Major Cities and three in areas classified as Regional.

Table 16 also shows that all the Independent boarding facilities in Tasmania (2), Northern Territory (1) and the ACT (2) have negative Income Statements.

There are 16 Independent boarding facilities in 'regional' areas of Australia, 13 have negative Income Statements (81%) with almost half being in regional Queensland.

Of the 29 Independent boarding facilities with negative Income Statements, 4 facilities have over 75% of their boarders being Indigenous, one each in WA and the Northern Territory and two in Queensland.

TABLE 17. BOARDING SCHOOLS WITHOUT SEPARATE ACCOUNTS BY STATE AND GEOLOCATION – 2019

		BOARDING SCHOOLS (DAY SCHOOL AND BOARDING FACILITY) WITH NEGATIVE INCOME STATEMENTS				
	TOTAL BOARDING FACILITIES	MAJOR CITIES	REGIONAL	REMOTE	TOTAL NO.	TOTAL %
NSW	32	0	5	0	5	16%
VIC	15	1	0	0	1	7%
QLD	19	0	3	0	3	16%
SA	8	1	0	0	1	13%
WA	15	0	1	0	1	7%
TAS	4	0	0	0	0	0%
NT	4	0	1	1	2	50%
ACT	0	0	0	0	0	0%
TOTAL	**97**	**2**	**10**	**1**	**13**	**13%**

Table 17 shows that 13 (13%) Independent boarding schools that **do not** keep separate boarding facility accounts have negative Income Statements for the combined day school and boarding facility. The losses these Independent boarding schools made range from $165,000 to $4.830 million. The total loss suffered across all the 13 boarding schools is $18.104 million.

The largest number of Independent boarding schools (day school and boarding facility combined) with negative Income Statements are in NSW (5 boarding schools or 16% of the boarding schools in that state) with all located in areas classified as Regional. Queensland has three Independent boarding schools with negative Income Statements (37% of boarding schools in that state) and again they are all located in areas classified as Regional. Northern Territory has two boarding schools with negative Income Statements (50% of all boarding schools in that state) with one each in areas classified as Regional and Remote.

There are 35 Independent boarding schools in areas classified as Regional that do not keep separate boarding facility accounts, 10 have negative Income Statements (29%) with five in NSW and 3 in Queensland.

Of the 13 Independent boarding schools with negative Income Statements, 2 schools have boarding facilities where over 90% of the boarders are Indigenous, both in the Northern Territory.

TABLE 18. ALL BOARDING SCHOOLS – 2019

		BOARDING SCHOOLS/FACILITIES WITH NEGATIVE INCOME STATEMENTS				
	TOTAL BOARDING FACILITIES	**MAJOR CITIES**	**REGIONAL**	**REMOTE**	**TOTAL NO.**	**TOTAL %**
NSW	41	4	8	0	12	29%
VIC	24	4	1	0	5	21%
QLD	33	3	10	0	13	39%
SA	10	2	0	0	2	20%
WA	19	2	1	0	3	16%
TAS	6	0	2	0	2	33%
NT	5	0	1	2	3	60%
ACT	2	2	0	0	2	100%
TOTAL	**140**	**17**	**23**	**2**	**42**	**30%**

Table 18 shows the data for all Independent boarding schools and facilities combined. Of the 140 Independent boarding schools and facilities across Australia, 82 (59%) are in areas classified as Major Cities, 51 (36%) are in areas classified as Regional and 7 (5%) are in areas classified as Remote.

Of the 51 Independent boarding schools and facilities in areas classified as Regional, 23 (45%) have negative Income Statements with 10 in Queensland and 8 in NSW. Of the 82 boarding schools and facilities in areas classified as Major Cities, only 17 (21%) have negative Income Statements and of the 7 boarding schools in areas classified as Remote, only 2 (29%) have negative Income Statements.

SUMMARY 4

Data analysis undertaken by Independent Schools Australia, about students who board at school and the boarding facilities provided by those schools suggests:

— There are 208 schools with boarding facilities in Australia, representing only 2.2% of all Australian schools.

— Over 23,000 boarding places are available to school students, potentially accommodating 0.6% of all Australian school students.

— Most boarding facilities are co-located and associated with a single school but there are a number of government residential colleges in Western Australia that provide boarding facilities to a number of schools.

— The Independent sector has the greatest number of boarding facilities of all the three school sectors:

  – Independent sector 135 (65%)
  – Catholic sector 41 (20%)
  – Government sector 32 (15%).

— The Independent sector has the greatest number of available boarding places, double the other two sectors:

  – Independent sector 15,901 (69%)
  – Catholic sector 4,415 (19%)
  – Government sector 2,809 (12%).

— The Independent sector is a large provider of boarding facilities for Indigenous students:

  – Over 2,100 indigenous boarders attend 120 Independent boarding schools
  – In 2020 indigenous boarders were 14.5% of all boarders using Independent school boarding facilities
  – There has been growth in the numbers of Indigenous boarders at Independent boarding schools over the period 2014 to 2020.

— In 2020 overseas students potentially made up 19% of all boarders at Independent schools, a drop of 994 overseas students (13%) since 2019.

— In the Independent sector 59% of boarding facilities are located in major cities, 36% are in regional areas and 5% are in remote areas.

— In the Independent sector, the average boarding facility has approximately 95 boarders and is associated with a school of 970 students.

— Between 2011 and 2020 growth in the number of new Independent boarding schools is lower (10.7%) than the growth in the total number of new Independent schools (17.3%).

— There has been negative overall growth (-6.9%) in the number of boarders using Independent school boarding facilities between 2011 and 2020 and particularly since 2017:

  – Approximately 30% of Independent school boarding facilities only have recorded an increase in boarder numbers
  – Boarder numbers have been decreasing regardless of the location of the boarding school, price point or student demographic at the boarding school.

— There appears to have been a significant negative impact on boarding numbers at Independent schools between 2019 and 2020 due to COVID.

- Based on 2019 financial data, 23 (45%) Independent boarding schools and facilities in areas classified as regional ran at a loss with 10 of those schools being in Queensland and 8 in NSW.
- The total loss incurred by all Independent boarding schools and facilities that have negative Income Statements in 2019 is $31.3 million