



Demographic Analysis

Indooroopilly State High School

18 March 2025

Executive Summary

This report evaluates current and projected enrolment patterns for Indooroopilly State High School (ISHS) by analysing resident student numbers (RSN) and the evolving dynamics of catchment-based and out-of-catchment (OOC) enrolments. The analysis integrates historical data, demographic trends, scenario-based projections, and sensitivity analysis to provide a comprehensive understanding of enrolment trajectories from 2024 to 2029.

Key drivers of forecasts

The sensitivity analysis confirms that **state school preference** and **OOC enrolments** are the most significant factors influencing ISHS enrolment projections. The following key trends shape future enrolment:

- **Secondary school-age population resident in the catchment:** Growth rates vary across low, medium, and high scenarios, with a slowdown projected between 2026 and 2031 before a recovery post-2036.
- **Changing Government School Preferences:** The proportion of secondary students attending government schools has risen from 30% in 2011 to 45% in 2021, indicating a broader trend favouring government schooling.
- **Out-of-Catchment Enrolment Policies:** The Enrolment Management Plan (EMP) has now been in place for a significant period, leading to stricter adherence to catchment enrolments and a decline in OOC student intake.

Methodological approach

The projections used a combination of:

- Updated Estimated Resident Population data (2021-2023) for catchment SA2 areas.
- Population projection data from the Australian Government's Centre for Population, the Australian Bureau of Statistics (ABS) and the Queensland Government Statistician Office (QGSO).
- Resident student number projection data from the QGSO and MULTI data sets.
- Distribution adjustments at Statistical Area 2 (SA2) level based on Queensland Government Statistician Office (QGSO) forecasts, Shaping SEQ MULTI data, and Census-based demographic insights.
- Scenario-based models to account for variations in migration patterns, fertility rates, and school preferences.

Scenario-based forecasts

BDO has developed a set of forecasts which provide a nuanced understanding of potential growth trajectories:

- **Low Scenario:** The secondary school-age population (both state and non-state students) starts at 4,657 in 2021 and grows modestly to 5,507 by 2046, reflecting conservative assumptions regarding migration and fertility.
- **Medium Scenario:** The secondary school-age population increases from 4,657 in 2021 to 5,781 by 2046, aligned with balanced demographic trends.

- **High Scenario:** The secondary school-age population grows from 4,657 in 2021 to 6,054 by 2046, driven by higher expectations for migration and fertility rates.

While the secondary school-age population forecasts encompass all secondary school-aged children within the catchment, including those attending private and government schools, the focus on ISHS demand makes school preference a critical factor. The proportion of resident students opting for government schools is essential in translating these broader secondary school-age population projections into a realistic resident student number (RSN) forecast for ISHS enrolments. RSN in this report refers to the number of state school attending students residing within a school's catchment area, irrespective of which Secondary State School they actually attend.

In this context, preference trends for government schooling play a pivotal role in shaping ISHS demand:

- **Low-growth scenario:** Preference remains constant at 44.9%.
- **Medium-growth scenario:** Preference grows to 50.9% by 2046.
- **High-growth scenario:** Government school preference rises from 44.9% in 2021 to 57.5% by 2046.

Consequently, the number of RSNs attending government schools is projected to reach:

- **2,473 students** under the low-growth scenario,
- **2,941 students** under the medium-growth scenario, and
- **3,486 students** under the high-growth scenario by 2046.

School preference is the main driver to be considered when developing a medium- to long-term planning target for ISHS. Policy decisions—such as managing enrolment growth through EMPs and influencing catchment-based student retention—will play a crucial role in maintaining this target. Strategic interventions are essential to balance demand with capacity, ensuring sustainable growth while adapting to evolving demographic trends within the catchment.

Scenario-based enrolment forecasts

Short-term enrolment forecasts were also developed using two options under three growth scenarios:

- Option 1 assumes stable OOC enrolments and consistent in-catchment proportions.
- Option 2 incorporates a gradual increase in in-catchment retention and a reduction in OOC enrolments.

Under Option 1, enrolments are projected to grow steadily across all scenarios, with the high growth scenario reaching 3,175 students by 2029.

Option 2 shows minimal growth due to stricter OOC policies, with the high growth scenario peaking at 2,886 students in 2029.

In the medium scenario, Option 1 reaches 3,016 enrolments at 2029 and Option 2 reaches 2,748, while in the low growth scenario Option 1 is at 2,814 enrolments and Option 2 is 2,564 at 2029.

Results and comparison to DoE forecasts

A comparison between the Department of Education's (DoE) current enrolment forecasts for the ISHS and the scenario-based projections developed in this study shows alignment within the projected range. The DoE forecasts are positioned between the two options of the medium-growth enrolment series from the BDO models, supporting the validity of DoE's approach.

For instance:

- The DoE forecast for 2029 projects total enrolments at 2,871 students.
- This aligns with the higher end of the low-growth scenario's Option 1 series (2,814 students).
- It also falls between the two options of BDO's medium-growth scenario, with 3,016 students in Option 1 and 2,748 students in Option 2.

This alignment indicates that the DoE's methodology effectively captures a balance of the potential drivers and trends analysed in the scenario models. It also underscores the value of using multiple forecasting approaches to assess the sensitivity of enrolment projections to demographic and policy assumptions.

Implications

The projections underscore the complex relationship between demographic trends and policy decisions:

- Increasing government school preferences will continue to drive enrolment growth.
- The EMP's focus on in-catchment enrolments ensures equitable access for local students but limits flexibility for OOC enrolments.
- Scenario-based approaches provide a robust framework for evaluating the impact of changing assumptions on enrolment outcomes.

Educational planning must be flexible and responsive to changes in key demographic and enrolment trends. Specifically, adaptive planning refers to the ability to adjust current plans and forecasts based on real-time data and emerging trends. In the case of school catchments, this could include revising projections or adjusting resources in response to shifts in population or other influential factors.

The key aspects of adaptive planning would involve monitoring and reviewing a set of critical indicators on an annual basis, with adjustments made where necessary. DoE currently review data and forecasts on an annual basis. While these forecasts provide a foundation for long-term planning, the responsibility for monitoring trends and adaptive planning remains with DoE.

Some of the data to be monitored include:

- Significant migration shifts: Tracking large-scale migration trends (either inbound or outbound) can help determine if demand for school places is likely to increase or decrease.
- Changes in fertility rates: Monitoring fertility rates is important as they directly influence the number of children entering the education system in the years ahead.
- School enrolment numbers: Actual enrolment data from year to year will help identify whether enrolments are meeting projections or whether changes in school popularity or catchment demand are occurring.

There are other inputs which should also be reviewed at regular intervals, with triggers established to prompt necessary adjustments to the plan when specific thresholds are met. Potential triggers might include:

- Population growth rates: If growth outpaces projections by a certain percentage, it could trigger the need to reconsider the capacity or location of schools.
- Enrolment numbers: A significant increase or decrease in enrolment figures relative to projections would be a strong indicator to adapt the current strategy.

- Shifts in school preference: If a school’s popularity shifts significantly (either positive or negative), it could trigger a reassessment of catchment boundaries or investment in that particular school.

Conclusion

The high-growth scenario with the Option 1 enrolment forecasts appears to be the most likely outcome under current policy settings, assuming OOC enrolment policies remain unchanged, and that government school preference continues to rise across the catchment. However, if any policy levers available to the Department of Education are adjusted—such as changes to OOC restrictions, new school investments, or capacity management strategies—this could significantly alter future enrolment trajectories, requiring ongoing monitoring of inputs.

Therefore, while the forecasts for ISHS enrolments are positioned to grow steadily, particularly under high-growth scenarios, the forecasts will require ongoing adjustments based on updated demographic and enrolment data to accommodate anticipated demographic shifts and evolving school preferences. This ongoing assessment will be critical in ensuring that enrolment policies remain responsive to actual demand trends, balancing school capacity with future student growth.

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Glossary

Acronym, abbreviation, or term	Definition/Description
ABS	Australian Bureau of Statistics
Centre for Population	The Centre for Population was established by the Australian Government in 2019 to be the focal point on population issues and to better understand how Australia's population is changing and the implications of these changes.
DoE	Queensland Department of Education
Enrolments	The number of students enrolled at ISHS reported in the DoE February Census enrolment head count.
Enrolment Management Plan (EMP)	The school EMP sets out the conditions under which students may be enrolled subject to any other requirements or limitations in the Education (General Provisions) Act 2006.
Government/State Schools	Publicly funded schools operated by the Department of Education.
Greater Capital City Statistical Area (GCCSA)	the geographical areas designed to represent the functional extent of each of the eight state and territory capital cities.
Internal Migration	The movement of people within a country, often between states, regions, or urban and rural areas.
ISHS Catchment	The ISHS catchment area is the geographical area from where the school will draw its core intake of students. Student's whose principal place of residence is within the school's catchment are entitled to be enrolled at the school.
ISHS	Indooroopilly State High School
Natural Increase	Population growth resulting from the difference between births and deaths within a population.
Net Overseas Migration (NOM)	The net difference between people entering and leaving a country or region for long-term or permanent residency.
Out of Catchment (OOC)	The number of students enrolled at ISHS whose principal place of residence is not within the school's catchment. OOC enrolments includes eligible enrolments and is recalculated annually to take into account changing student locations.

Acronym, abbreviation, or term	Definition/Description
Population Projections	Estimates of future population size and composition based on current trends and assumptions about births, deaths, and migration.
Preference Rate	The proportion of students or families choosing a particular type of school (e.g., government or private).
Progression rate	The percentage of students who advance from one grade level to the next within the same schooling phase (e.g., from Year 7 to Year 8).
QGSO	Queensland Government Statisticians Office
Resident School-aged Network (RSN)	The number of state school attending students residing within a school's catchment area.
Retention rate	The percentage of students who remain enrolled in a particular school or educational system over a defined period, often from the beginning to the end of a schooling phase (e.g., from Year 7 to Year 12).
Statistical Area Level 2 (SA2)	The SA2 is one of the spatial units defined under the Australian Statistical Geography Standard (ASGS). It is the most common and consistently used spatial unit in demographic data analysis.
Secondary school-age population	The number of students attending secondary schools (including state and non-state attending students) residing within a school's catchment area.
Total Fertility Rate (TFR)	The total fertility rate in is defined as the total number of children that will be born to each woman. A TFR of 2.1 is considered the replacement level fertility rate.
Transition rate	The percentage of students who move from one educational level or grade to the next within a specified time frame (e.g., from Year 6 to Year 7).

Limitations

The method used in developing these enrolment forecasts using population projection data from multiple sources can introduce several limitations, including:

- **Data Inconsistency:** Sources may use varying methods for collecting and processing data, leading to inconsistencies when combining them.
- **Assumptions and Uncertainty:** Different sources often rely on distinct assumptions about growth rates, migration patterns, or economic trends, making it challenging to reconcile projections.
- **Temporal and Spatial Resolution:** Statistical boundaries differ across datasets, requiring interpolation or aggregation.

- **Scenario Complexity:** The assumptions underpinning the scenarios do not account for future changes, such as policy shifts or unexpected economic events. Rapid changes, such as technological disruptions or major demographic shifts, may not be fully reflected in historical data.

The full methodology used in developing these forecasts is detailed in Appendix A, while the sensitivity analysis, which explores the impact of key assumptions on enrolment projections, is provided in Appendix B.

Data sources

Data sources used in the compilation of these forecasts are shown in Table 1 below.

Table 1: List of data sources used in the formulation of the new forecasts

Data set	Source	Last update
School enrolments		
Historical	DoE	
Current	DoE	
Forecast (up until 2046)	BDO	2024
Population		
Estimated resident population	ABS Regional Population 2022-23	March 2024
Population projections	Data derived using growth from the following sources <ul style="list-style-type: none"> • Shaping SEQ MULTI • Centre for Population 2023, Population Statement: Capital City Population Projections by age • Australian Bureau of Statistics Population Projections 	<ul style="list-style-type: none"> • 2023 Edition • 2023-24 update by age • November 2023, (base year 2022)
State school attending population	<ul style="list-style-type: none"> • Shaping SEQ MULTI • Department of Education 	<ul style="list-style-type: none"> • 2023 Edition • Unpublished data

1. Background

1.1. Objective

Indooroopilly State High School (ISHS) has experienced significant enrolment growth over the past two decades, reaching over 2,800 students in 2024. While much of this growth is attributed to in-catchment population increases, the school has also continued to enrol a significant number of out-of-catchment students.

The Department of Education (DoE) has conducted a master planning process for the school, targeting a medium- to long-term enrolment of approximately 2,500 students. Through departmental planning and strict enforcement of the School Enrolment Management Plan (EMP), projections indicate that enrolments will peak in the coming years before gradually declining. The first ISHS EMP was implemented on 30 October 2009.

An EMP is introduced in a state school which is nearing its student enrolment capacity to ensure that school facilities are sufficient to guarantee all students residing within the designated catchment area a place at the school. To enrol in a school that has an EMP in place, students must meet the eligibility criteria outlined in the School EMP. Siblings of current students may also be considered for enrolment, regardless of whether they live within the catchment. Principals of schools with EMPs are required to restrict the enrolments from out-of-catchment students when enrolments reach 80% of the school's student enrolment capacity. A school's student enrolment capacity is the number of students the school can accommodate within the existing learning spaces in the school.

However, there are differing views among stakeholders regarding the long-term enrolment target of 2,500 students. Indooroopilly SHS P&C Association have expressed concerns, suggesting the DoE's forecast does not account for expected enrolment growth over the next five years.

To address these concerns, the DoE has engaged BDO to conduct an independent assessment of the in-catchment population of the ISHS and to review the department's current enrolment forecasts.

BDO also undertook a demographic analysis of the ISHS catchment area, including the development of low, medium, and high scenarios of state student projections for the catchment populations. This analysis aims to provide potential enrolment numbers based on projected resident student yields within the catchment.

1.2. Scope

1.2.1. Indooroopilly State High School

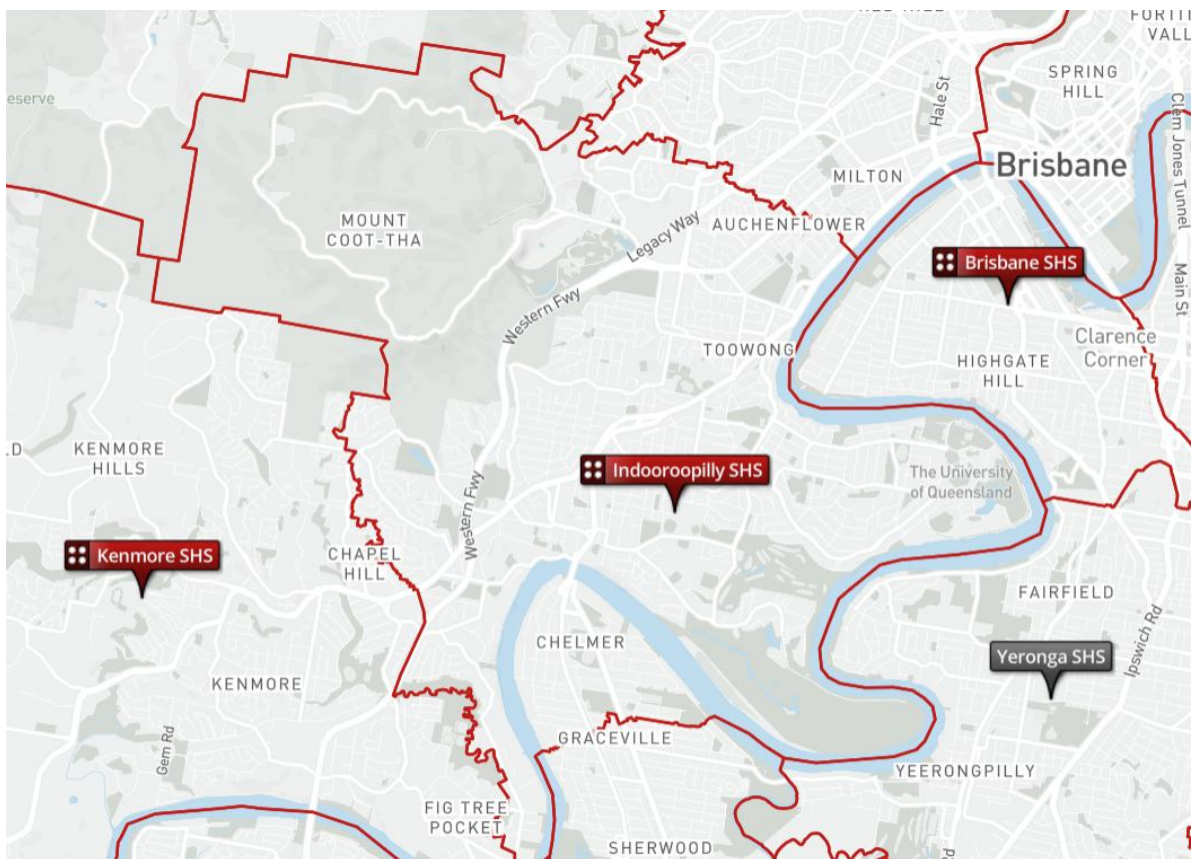
Indooroopilly State High School, located in the western suburbs of Brisbane, serves a diverse catchment area that includes several surrounding suburbs. The primary catchment includes the Statistical Areas (SA2) of Indooroopilly, Taringa, St Lucia, Toowong, and parts of the Chapel Hill, Chelmer-Graceville, Auchenflower, Bardon and Fig Tree Pocket SA2's (Figure 1).

These areas are well-connected to the school by public transport and are known for their proximity to the Brisbane River, abundant green spaces, and strong community networks. The catchment area also encompasses both residential and commercial zones, providing a vibrant mix of students from various backgrounds. Students living within this catchment typically have priority access to ISHS, although the school also accepts enrolments from other areas depending on availability.

ISHS will have a maximum student enrolment capacity of 2,770 students for the start of the 2025 school year.

The school's Programs of Excellence in Spanish Immersion, Chinese Acceleration, Maths and Engineering Acceleration, Aviation, CISCO Networking Academy and International Baccalaureate Diploma are supported through the allocation of a defined number of places. Places in the Programs of Excellence will only be available to out-of-catchment enrolments once the demand for in-catchment enrolment has been met and sufficient student enrolment capacity has been reserved for future in-catchment growth.

Figure 1: ISHS Catchment Boundary

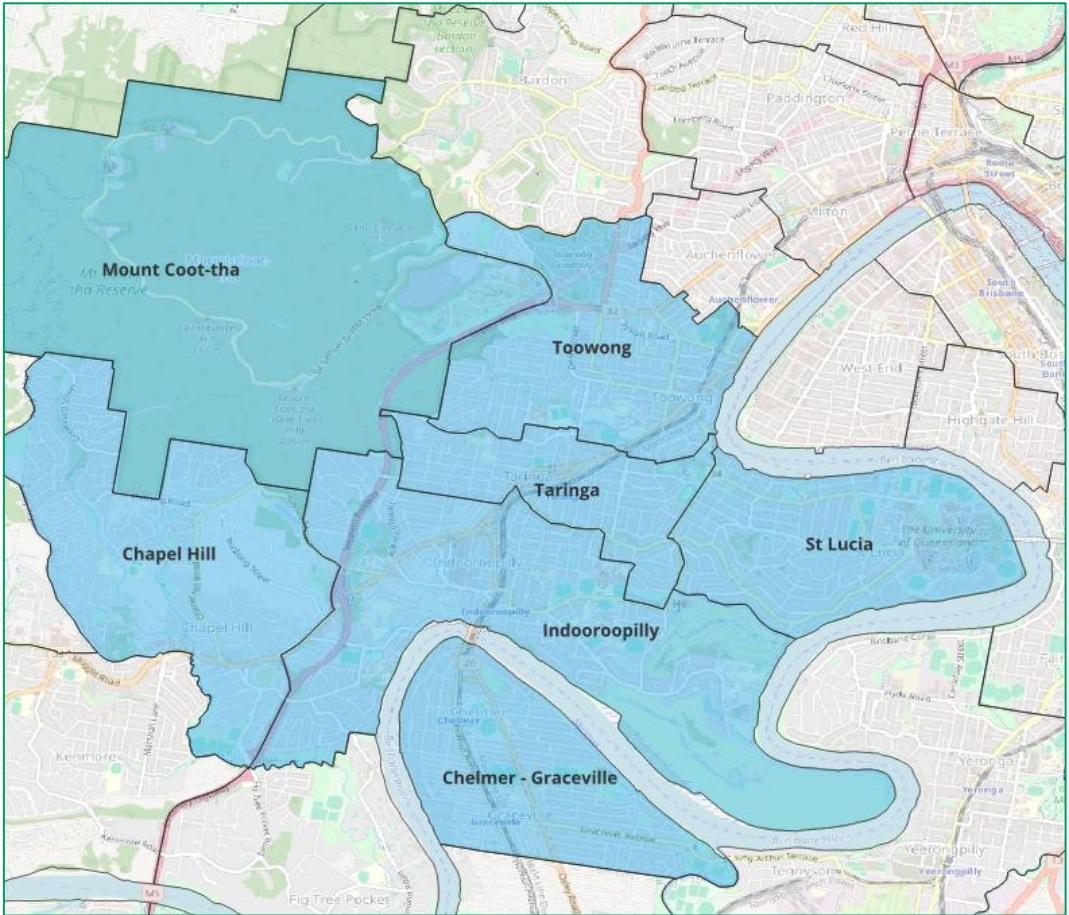


The Indooroopilly State High School catchment area (see Figure 1) encompasses residential and commercial zones, servicing a diverse mix of students from various backgrounds. The area is well-connected to the school by public transport, and is within proximity to the Brisbane River, abundant green spaces, and strong community networks. Students living within this catchment typically have priority access to ISHS, although the school also accepts enrolments from other areas depending on capacity.

1.2.2. ISHS best fit boundary for data analysis

As the DoE school catchment boundaries are not based on the Australian Standard Geography Standard (ASGS) boundaries, a best fit of the ISHS catchment has been created using these boundaries to enable data analysis to be undertaken from a number of sources utilising a consistent set of boundaries. The ASGS is a classification of Australia into a hierarchy of statistical areas. The decision to align with ASGS boundaries for this analysis ensures comparability, accuracy, and alignment with official statistical data, facilitating reliable analysis and informed decision-making across various geographic levels.

Figure 2: SA2s in best fit boundary analysis



2. Demographic analysis

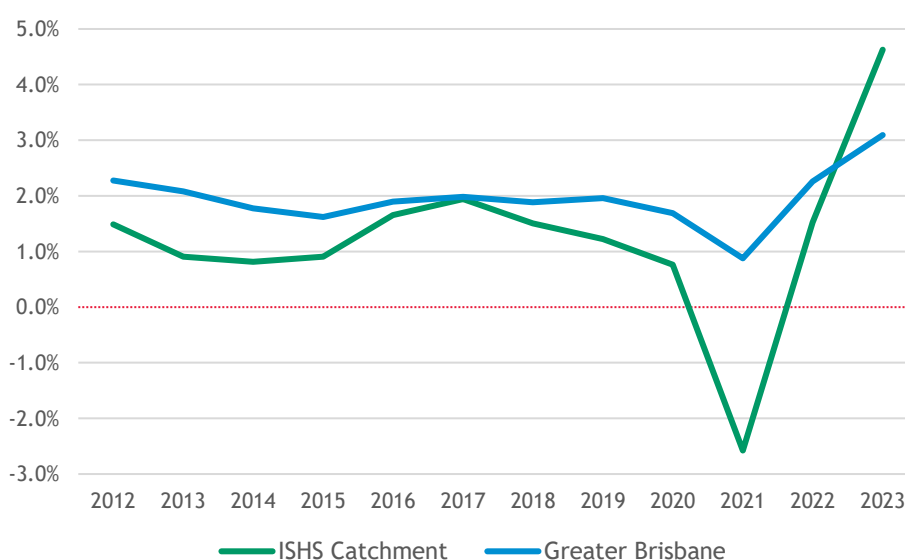
2.1. Population data

2.1.1. Total population

Brisbane's population has grown significantly since 2011, driven by a combination of natural growth, interstate migration, and overseas migration. The Greater Brisbane area experienced an annual average growth rate of 1.9% p.a. from 2011 to 2023, with the population of 2.71 million as of June 2023.¹

Between 2021 and 2023 Brisbane reported very strong population growth (2.3% between 2021 and 2022, and 3.1% between 2022 and 2023) primarily driven by net overseas migration as the borders re-opened after the COVID-19 pandemic. Net overseas migration across Brisbane increased from 17,000 between 2021 and 2022 to almost 52,000 between 2022 and 2023, accounting for 64% of the population growth across Brisbane between 2022 and 2023.² The 3.1% growth rate between 2022 and 2023 across Brisbane was the highest reported since 1967.³

Figure 3: Population annual growth rates 2011-2023



Source: Australian Bureau of Statistics, Population estimates by age and sex, by SA2, 2001 to 2023

Across the ISHS catchment, the population in 2023 was approximately 71,000 residents. Since 2011, the population grew only 1.2% p.a., compared to 1.9% p.a. across Greater Brisbane. While population growth across the ISHS catchment has typically been lower than that across Brisbane, between 2022 and 2023 there was an increase of 4.6%. However, given the location of the University of Queensland within the

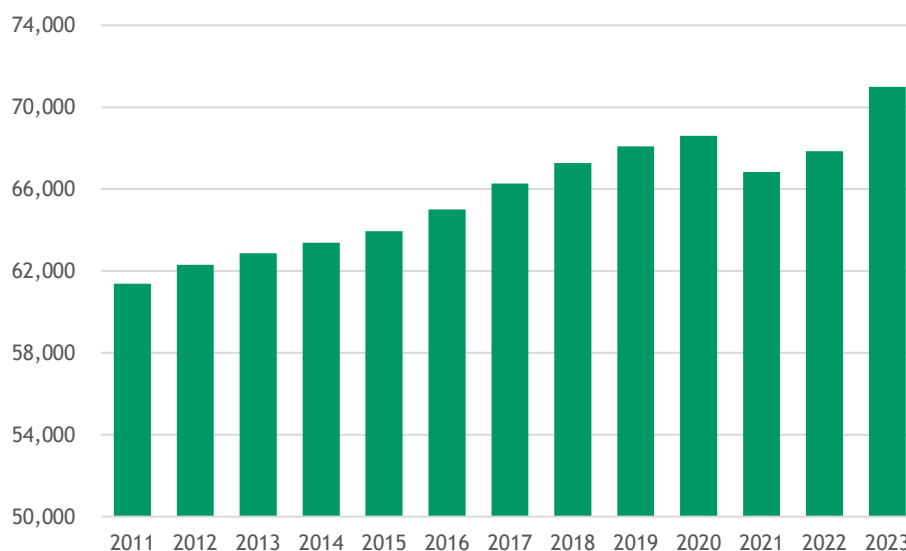
¹ Australian Bureau of Statistics (ABS), Regional Population by age and sex, 2023

² ABS, Population components by SA2 and above, Regional Population 2022-23

³ ABS, Historical Population, Population distribution 2021

ISHS catchment, this reflects the significant increase in the number of international students returning following COVID-19, rather than any particular shift in other demographics.

Figure 4: Estimated Resident Population across the ISHS catchment, 2011 to 2023



Source: ABS, Regional Population, June 2023

2.1.2. Population by age

Australia's ageing demographic has played a significant role in shaping population trends. While Brisbane has experienced growth in younger populations due to interstate (a trend not seen across the ISHS catchment) and international migration, the median age has continued to rise, aligning with broader national trends of an ageing population. This demographic shift is projected to result in a higher proportion of people over 65 in the coming decades, influencing service demands, infrastructure planning, and community support needs.

Concurrently, inner urban areas like Indooroopilly and Toowong are experiencing increasing demand from young professionals and retirees, many of whom are downsizing to apartments. While this shift toward higher-density living contributes to greater population diversity, it does not necessarily translate into corresponding growth in younger cohorts, particularly the 0-4 and 5-9-year age groups. Since 2018, growth rates for the 0-4 age group across the ISHS catchment have declined significantly, from around 1.2% between 2018 and 2019 to approximately -8.7% between 2022 and 2023. Similarly, the cohort aged 5-9 has also recorded negative growth rates since 2021. These declines highlight ongoing demographic changes, including potential reductions in family formation rates, affordability pressures, and lifestyle preferences that influence residential choices.

However, it is important to consider the evolving dynamics of urban development, particularly in areas undergoing housing redevelopment and increasing urban density. While a decline in birth rates and negative net internal migration indicates a short-term reduction in the number of young children entering the education system, an increasing proportion of households with children in some parts of the catchment may help counterbalance this trend. Areas with greater housing redevelopment and densification could see a rise in family households, shifting the age distribution and sustaining school enrolment numbers over time.

ISHS catchment Census data confirms that while a proportion of students live in apartments, the overall population growth in school-aged children is still shaped by birth rate declines and migration trends. From the 2021 Census across the ISHS catchment:

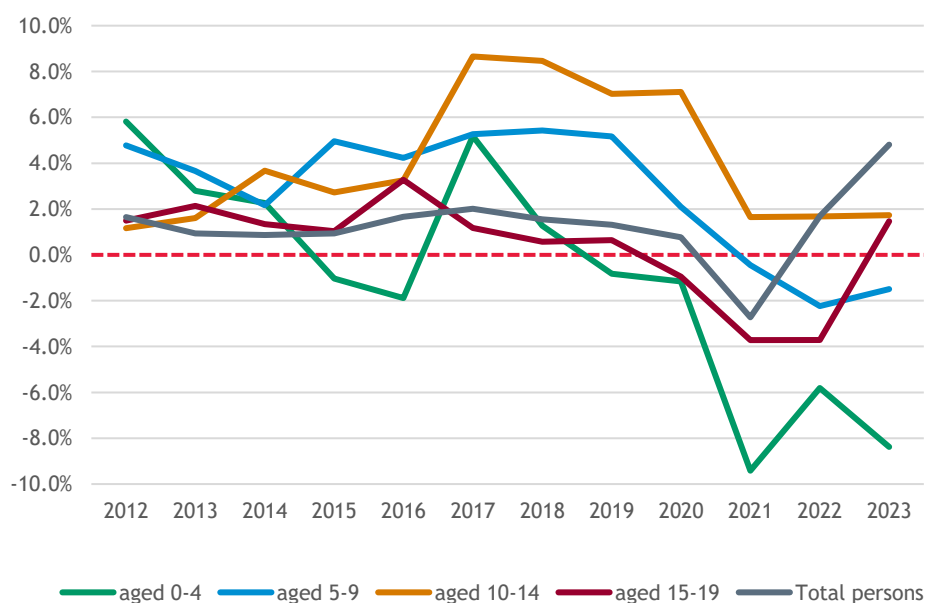
- 33% of all families live in apartments
- 52% of families in apartments are couple family with no children
- 15% of families in apartments are one parent families (7% have children under 15 only)

Conversely, the 15-19 age cohort within the catchment has seen an increase since 2022, driven primarily by the return of overseas students post-COVID, many of whom are attending the nearby University of Queensland. As aforementioned, this rise is influenced by migration and education-related movement patterns but does not offset the broader declines in younger age groups. It should be noted that while overseas migration influences the 18-19-year-old cohort significantly, its impact on the 15-17-year-old population—and therefore secondary school enrolments—is minimal.

The sustained decline in younger age groups is likely to have downstream effects on future high school enrolments. With fewer children entering the early schooling years, the pool of students progressing through primary education and eventually into high schools may shrink over time. For ISHS, this shifting demographic pattern underscores the need for strategic planning to balance fluctuating enrolment demands with the school's capacity and resources. While the area's attractiveness to young professionals may bolster enrolments in some higher-density housing areas, these dynamics could result in uneven growth across the broader catchment,

While a decline in birth rates and negative net internal migration indicates a decrease in the number of young children entering the system in the short term, the shifts to an increasing proportion of households with children, especially in areas with housing redevelopment and increasing urban density could counterbalance this effect.

Figure 5: Population by age, annual growth rates 2011-2023, ISHS catchment area



Source: ABS, Regional Population, June 2023

2.1.3. Family composition

ABS Census data on family types in the ISHS catchment region between 2011 and 2021 highlights several important factors for future school enrolments. Over the decade, couple families with no children have seen a slight decrease, from 42.3% in 2011 to 39.9% of all family types in 2021, even while the number of couple families with no children has increased from around 5,540 in 2011 to 6,360 in 2021.

In contrast, the proportion of couple families with children increased from 42.1% in 2011 to 44.9% in 2021, signalling a consistent presence of traditional family units within the area. At the same time, one-parent families have seen a gradual rise, growing from 10.3% to 12.0% over the decade, reflecting a broader trend of single-parent households becoming more common.

Finally, other families, which include extended families or unrelated individuals living together, have decreased from 5.3% in 2011 to 3.2% in 2021. This shift suggests a movement away from diverse living arrangements present over the past decade. Overall, the data highlights an increase in families with children, while the proportion of childless couple families and non-traditional family types has slightly declined.

Table 2: Family composition, ISHS catchment area 2011-2021

	2011	2016	2021
Couple family with no children	42.3%	40.9%	39.9%
Couple family with children	42.1%	44.7%	44.9%
One parent family	10.3%	10.5%	12.0%
Other family	5.3%	3.9%	3.2%

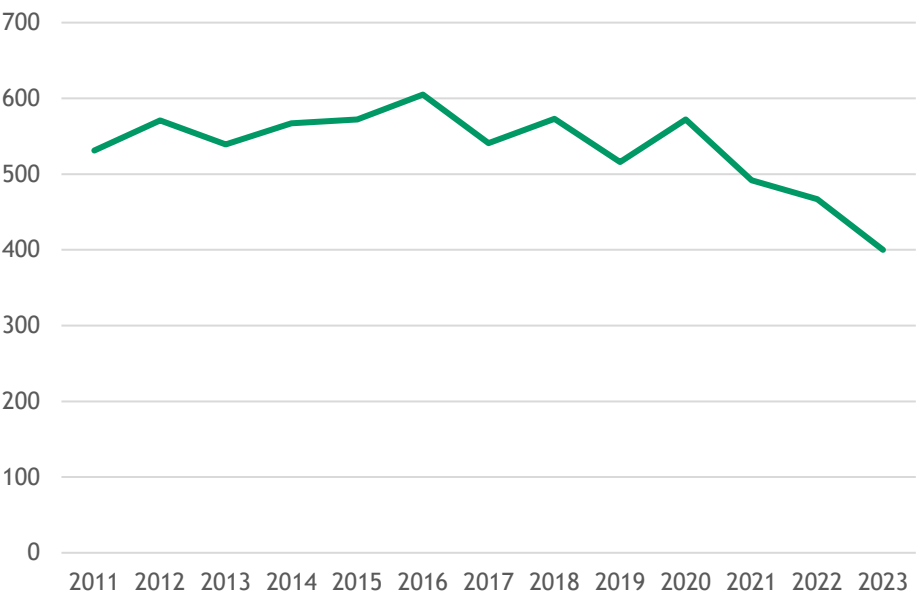
Source: ABS, 2021 Census of Population and Housing

Housing data suggest an increasing proportion of households with children in the catchment, however there is no real trend towards multi-family households. Across the ISHS catchment the number of multi-family households is quite low - 1.3% at the last Census. As a result, a shift from single-family homes to multi-family units is not considered to have any effect on RSN or enrolments in the short-term.

2.2. Fertility and birth rates

Fertility rates and birth rates across Brisbane and the ISHS catchment mirror reflect national patterns and localised demographic influences. Over the past decade, the number of registered births in the ISHS catchment has fluctuated but shows a clear overall decline. Births peaked in 2016 at 605, reflecting a high point in local demographic dynamics (see Figure 6). However, apart from brief spikes in 2018 and 2020, births have steadily decreased, reaching a low of 400 in 2023. This represents a 25% reduction from 2011, a 34% decrease from the 2016 peak, and a 14% drop from 2022.

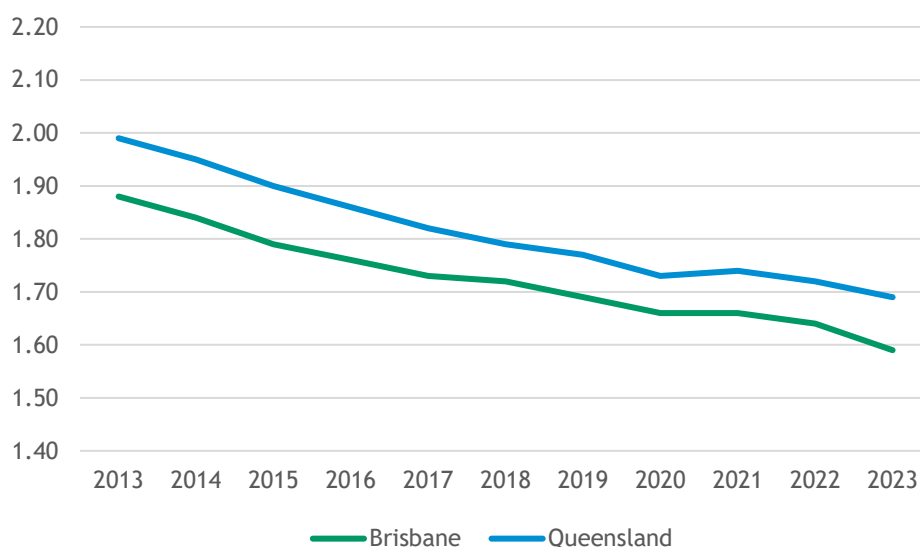
Figure 6: Number of registered births, ISHS catchment area, 2011-2023



Source: ABS, Registered births and summary statistics, 2023

The declining birth numbers in the ISHS catchment align with broader fertility trends in Brisbane. In Brisbane, the Total Fertility Rate (TFR) has steadily declined, mirroring broader National and State trends, with TFRs across Brisbane GCCSA dropping from 1.88 in 2013 to 1.72 in 2018 and further again to 1.59 in 2023, well below the replacement level of 2.1 children per woman. Fertility rates across Queensland have also been declining since 2008. This decline is driven by factors such as increased workforce participation by women, delayed family formation, greater access to reproductive healthcare, and rising living and housing costs. Furthermore, age-specific fertility rates show a consistent trend toward older maternal ages, with the 30-34 age group recording the highest fertility rate in Queensland. This decline is driven by factors such as increased workforce participation by women, delayed family formation, greater access to reproductive healthcare, and rising living and housing costs.

Figure 7: Fertility rates, Brisbane and Queensland, 2013 to 2023



Source: ABS, Registered births and summary statistics, 2023

Within the ISHS catchment, fertility rates have consistently declined across all SA2s. These rates are notably lower than Brisbane's overall fertility rates, ranging from a low of 0.74 in St Lucia to a relatively higher 1.50 in Chelmer-Graceville as of 2023. The most populous areas, Indooroopilly and Toowong, both have fertility rates below 1.00.

This persistent trend of sub-replacement fertility within the ISHS catchment has significant implications for future school enrolments. Low fertility rates mean fewer births, leading to a smaller pool of students entering early childhood education and progressing through primary to secondary schooling, impacting future demand for educational services. For ISHS, this could result in declining enrolment numbers in the medium to long term, particularly as smaller cohorts age into secondary school.

Table 3: Births and Fertility Rates across the ISHS catchment

Area	2013		2018		2023	
	Births	Fertility Rate	Births	Fertility Rate	Births	Fertility Rate
Chapel Hill	90	1.53	104	1.64	67	1.30
Chelmer - Graceville	99	1.95	88	1.76	47	1.50
Indooroopilly	102	1.21	89	1.01	78	0.88
St Lucia	67	0.93	66	0.85	54	0.74
Taringa	68	1.01	91	1.11	43	0.85

Area	2013		2018		2023	
	Births	Fertility Rate	Births	Fertility Rate	Births	Fertility Rate
Toowong	113	1.15	135	1.20	111	0.94
ISHS Catchment	539	n/a	573	n/a	400	n.a
Greater Brisbane	31,145	1.88	31,578	1.72	29,467	1.59
Total Queensland	63,354	1.99	61,931	1.79	58,458	1.69

Source: ABS, Registered births and summary statistics, 2023

The area's demographic profile provides further context to these trends. The catchment is characterised by a high proportion of tertiary-educated residents and professional families, who are more likely to delay childbirth or opt for smaller family sizes. Consistent with the state-wide trend, housing affordability pressures also play a role, with limited access to family-friendly housing pushing some potential parents to relocate outside the catchment.

Recent housing developments in the ISHS catchment could partially counteract these trends by attracting younger families, potentially increasing birth rates in the medium term. However, this impact may be insufficient to fully offset declining fertility rates, necessitating a greater reliance on migration—both interstate and international—for population growth. For example, the area has seen an increase in 15-19-year-olds, influenced by the influx of overseas students attending the nearby University of Queensland.

Understanding and planning for these fertility patterns are critical for school resource allocation and infrastructure development. Sub-replacement fertility rates signal a need for proactive measures, such as diversifying enrolment strategies or adapting capacity to fluctuating demand. Additionally, a reliance on migration introduces variability and unpredictability, emphasising the importance of data-driven planning for future educational facilities within the catchment.

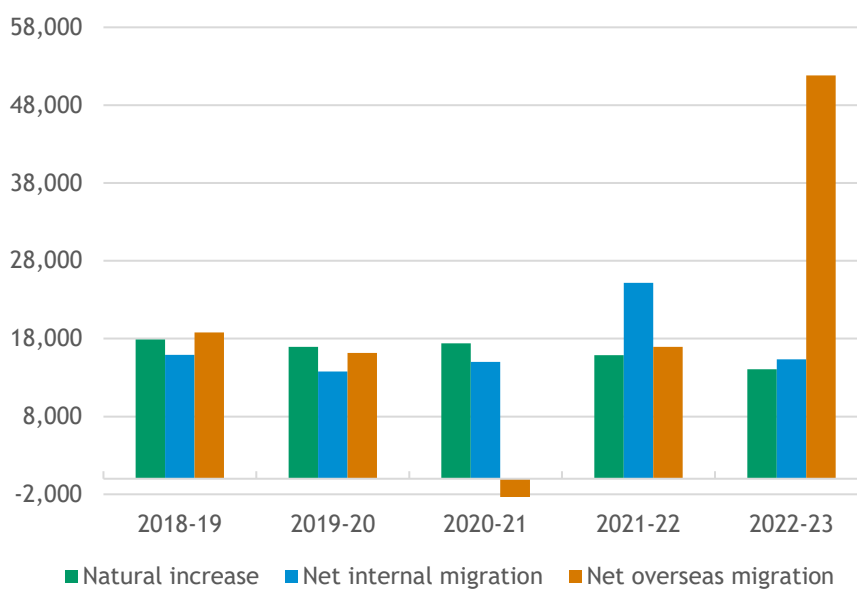
2.3. Migration and mobility

2.3.1. Brisbane GCCSA

Migration and mobility patterns have been significant drivers of population change across the Brisbane GCCSA over the past decade. International migration has been a major contributor to growth, with Brisbane increasingly attracting overseas migrants due to its relative affordability, high-quality lifestyle, and expanding employment opportunities. Between 2011 and 2021, a substantial proportion of migrants originated from countries like India, China, and the Philippines, reflecting Australia's broader immigration trends. These arrivals have significantly shaped the demographic and cultural landscape of Brisbane, contributing to its diversity and increasing the demand for housing and services in well-connected suburbs such as Indooroopilly and Toowong.

Interstate migration plays a critical role in Brisbane's population growth. The city has been a key destination for Australians relocating from southern states, particularly New South Wales and Victoria. This trend accelerated during the COVID-19 pandemic as remote work arrangements and a desire for more spacious living prompted many to move north. Brisbane's affordability relative to Sydney and Melbourne, combined with its subtropical climate, has made it especially appealing for young families and retirees.

Figure 8: Population change by component, Brisbane 2018-19 to 2022-23



Source: ABS, Regional population, population components by SA2 and above

2.3.2. ISHS catchment

Net overseas migration has been the dominant driver of population growth across the ISHS catchment, particularly due to the significant influence of international arrivals, including university students. The University of Queensland, with its strong global reputation, serves as a major attractor for these students, many of whom choose to reside in or near the catchment during their studies. This influx offsets some of the population losses caused by negative internal migration while also enhancing the area's cultural and economic diversity.

However, overseas migration patterns have been notably volatile in recent years. The COVID-19 pandemic led to a dramatic drop in overseas migration during 2020-21, particularly as international borders closed, and university enrolments declined. This trend reversed sharply in 2022-23 as borders reopened and international students returned in large numbers, contributing to a surge in migration and boosting local population growth.

While overseas migration has bolstered population numbers, it introduces variability, as international student populations are sensitive to global events, migration policies, and economic conditions. These patterns suggest that the catchment's reliance on external factors for growth is increasing, while natural increase and local migration continue to weaken.

Table 4 below illustrates the components of population change across the ISHS catchment by SA2 from 2021-22 to 2022-23, highlighting recent trends in natural increase, net internal migration, and net overseas migration.

- **Natural Increase:** Most SA2s recorded small or negative natural increases in 2022-23, indicating a declining local birth-death balance. The catchment total decreased from 214 in 2021-22 to 159 in 2022-23.
- **Net Internal Migration:** Negative internal migration trends were widespread, with the catchment total dropping from -136 in 2021-22 to -666 in 2022-23. Indooroopilly and St Lucia recorded the largest declines, suggesting outflows of residents to other areas.
- **Net Overseas Migration:** Overseas migration surged dramatically, increasing from 939 in 2021-22 to 3,647 in 2022-23 across the catchment. St Lucia, Indooroopilly, and Toowong saw the largest contributions, reflecting their appeal to international migrants, particularly students.

Table 4: Components of population change by SA2, ISHS catchment, 2021-22 to 2022-23

SA2	Components of Population Change					
	2021-22			2022-23		
	Natural increase	Net internal migration	Net overseas migration	Natural increase	Net internal migration	Net overseas migration
	no.	no.	no.	no.	no.	no.
Chapel Hill	0	-75	65	-3	18	184
Chelmer - Graceville	15	-73	36	-3	-26	156
Indooroopilly	39	-41	241	32	-193	833
St Lucia	30	60	357	35	-195	1,370
Taringa	65	21	94	23	-111	462
Toowong	65	-28	146	75	-159	642
Catchment	214	-136	939	159	-666	3,647

Source: ABS, Regional population, population components by SA2 and above

These trends emphasise the growing importance of overseas migration in offsetting local population losses, while declining natural increases and negative internal migration highlight challenges in sustaining local growth.

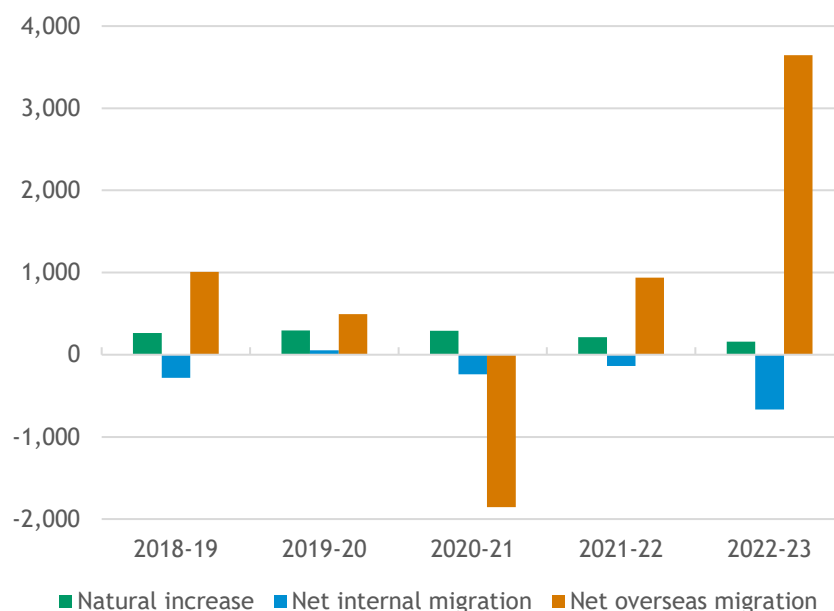
The anticipated population changes indicate that enrolment growth in the coming years may remain slow or fluctuate. While new housing developments may attract younger families and partially offset these declines, they are unlikely to generate substantial growth. This underscores the need for adaptive planning that considers both the benefits and uncertainties associated with overseas migration.

In Figure 9 we see that over the past five years, net internal migration (comprising both interstate and intrastate movements) has been slightly negative in four of those years, indicating that recently more people are leaving the catchment for other parts of Queensland or Australia than are moving in. This trend likely reflects housing affordability pressures, limited availability of family-friendly housing, and lifestyle shifts that encourage relocation to outer suburbs or regional areas.

Simultaneously, population growth due to natural increase (the balance of births over deaths) has diminished significantly over the past two years. As mentioned previously, declining fertility rates and an ageing demographic are key contributors to this trend, with fewer births compounding the effect of negative internal migration on the local population base.

While net internal migration across the ISHS catchment is currently negative, this just means that overall, more people are moving out of the catchment than in. What it doesn't mean is that families targeting ISHS for secondary enrolment are not moving into the catchment. Net internal migration does not preclude specific inflows of families targeting ISHS, particularly for Year 7 entry.

Figure 9: Population change by component, ISHS catchment 2018-19 to 2022-23



Source: ABS, Regional population, population components by SA2 and above

2.3.3. Impact of international migration on the ISHS catchment

Over the past five years, international migration has been the key demographic factor shaping the population dynamics of the Indooroopilly catchment area. The University of Queensland has played a central role in attracting international students to the region, further influenced by the effects of the COVID-19 pandemic and the subsequent reopening of international borders. However, the influence of international migration on the local secondary school cohort (12-17 years) is more complex and indirect.

While international migration has been a significant driver of growth in the tertiary education sector, its effect on younger age groups, particularly those in the 12-17-year-old range, is more limited. Families with young children typically represent a smaller proportion of international arrivals, meaning the primary school-aged cohort (0-11 years) is less impacted by international migration trends. Similarly, the

secondary school cohort experiences limited influence, with international migration often involving families relocating for tertiary education or accompanying students enrolled at UQ. Although these families may move into the catchment area, they do not typically contribute significantly to enrolment growth in local secondary schools.

That said, the presence of UQ within the catchment can still attract some international families seeking quality secondary education for their children. These families may be drawn to the region not only for the university’s offerings but also due to the strong reputation of local schools. The proximity to UQ provides educational continuity, which may influence family decisions to settle in the area, as they look for a seamless transition from secondary to tertiary education.

The largest influx of international migrants is seen in the tertiary age group (18-25 years), where UQ’s prominence as a leading institution draws a considerable number of international students. While this demographic contributes significantly to the area’s cultural and economic diversity, its impact on secondary school enrolments remains minimal.

Migration within adult and family-age groups (25+ years) also contributes to population growth in the region, particularly with young professionals and families moving into the area. While these families may include school-aged children, they represent a smaller proportion of the overall migration flow, and their influence on secondary school enrolments is limited.

So, while international migration has significantly shaped the local population over the past five years, and influences the 18-25-year-old cohort significantly, its impact on the 15-17-year-old population—and therefore its direct effect on the secondary school cohort in the Indooroopilly catchment remains modest. The primary drivers of secondary school enrolment growth are more likely to be internal migration, natural population growth, and increases in family-friendly and more affordable housing stock.

2.4. Housing and development

2.4.1. Housing structure

Between 2011 and 2023, there has been a marked shift toward higher-density residential developments, particularly apartments and townhouses. In 2011, apartments accounted for approximately 39% of all dwellings in Indooroopilly, increasing to 47% by the 2021 Census.

Table 5: Proportion of dwellings by housing structure, ISHS catchment, 2021

	2011	2016	2021
Semi-detached	8.2%	5.9%	5.5%
Flat or Apartment	38.8%	41.5%	46.5%
Separate house	52.8%	51.9%	47.8%

Source: ABS, 2021 Census of Population and Housing

This trend reflects a growing demand for low-maintenance, lifestyle-driven housing options, particularly among young professionals, downsizers, and families seeking proximity to amenities such as Indooroopilly and Toowong Shopping Centres and public transport hubs. Taringa and St Lucia have also seen an increase in the proportions of flats and apartments, due to their proximity to the University of Queensland campus.

The largest increase in apartments has been in Toowong which has increased from 55% of housing stock in 2011 to 69% in 2021. The proportion of housing stock that is apartments has also increased in St Lucia (56% to 62%), Taringa (57% to 65%) and Indooroopilly (41% to 47%) In Chapel Hill, 97% of dwellings are separate houses and in Chelmer-Graceville over 90% of dwellings are separate houses.

2.4.2. Tenure type

The tenure type across the ISHS catchment has remained relatively stable since 2011, highlighting the area's well-established housing market. The stable tenure distribution highlights a combination of long-term residential stability and vibrant rental demand within the catchment. Approximately 27-28% of dwellings are owned outright, 25-27% are owned with a mortgage, and around 41% are rented. These figures reflect a balanced distribution between homeownership and rental housing, indicative of a mature suburban environment with mixed housing opportunities.

In high-density SA2s such as Toowong, Indooroopilly, and Taringa, rental proportions are notably higher, ranging from 44% in Indooroopilly to 53% in Toowong. This consistency since 2011 suggests a strong and persistent demand for rental properties in these areas. Factors driving this trend include the proximity to the University of Queensland and major employment hubs, which attract students, professionals, and transient populations. Additionally, the high availability of apartment complexes and other high-density housing options further supports the rental market.

Table 6: Proportion of dwellings by tenure type, ISHS catchment, 2021

	2011	2016	2021
Owned outright	27.9%	27.1%	27.6%
Owned with a mortgage	24.7%	25.0%	26.8%
Rented	40.9%	40.6%	41.1%
Not stated	6.5%	7.3%	4.4%

Source: ABS, 2021 Census of Population and Housing

2.4.3. Rental market across catchment

Table 6 highlights the changing trends in the rental market across the SA2s within the ISHS catchment. Rental accommodation has grown significantly within the Toowong and Indooroopilly SA2s, reflecting the increase in the numbers of units being developed leading to increased investor interest and strong tenant demand, with vacancy rates consistently low. Current vacancy rates across the ISHS catchment range from 0.9% in Chapel Hill to 2.3% in Indooroopilly.⁴ However, across other areas of the catchment the number of available rental properties has either decreased or reported slower growth in areas with lower density housing stock such as Chelmer and Chapel Hill.

⁴ Real Estate Investar Suburb Snapshots, <https://www.realestateinvestar.com.au/property/brisbane+city>

Overall, the catchment experienced a 16.1% growth in dwellings rented, though this varied by SA2. Chapel Hill and Indooroopilly saw significant increases in rented dwellings (4.2% and 10.3%, respectively), with median weekly rents of \$840 and \$700. Meanwhile, Chelmer-Graceville, St Lucia, and Taringa recorded decreases in rental dwellings (-10.5%, -2.8%, and -6.8%, respectively), despite notable increases in rent, with Chelmer reaching the highest median weekly rent of \$915.

Toowong stood out with the highest growth in rented dwellings at 58.1%, though its rent increase was modest (10.6%), and its median weekly rent remained relatively low at \$459. St Lucia had the lowest median weekly rent at \$450, reflecting a relatively smaller rent increase of 25%, possibly due to its student population which has a minimal impact on rental trends.

Overall, these trends suggest varying rental market characteristics across the catchment, influenced by housing demand, affordability, and demographic factors within each suburb. These housing dynamics reinforce the catchment's appeal but may limit the opportunity for further population growth unless development opportunities are explored.

Table 7: Growth in rental dwellings and median rent Sep 2017 to Sep 2024 across ISHS catchment

SA2	Growth in dwellings rented	Increase in rent	Median weekly rent Sep 2024
Chapel Hill	4.2%	68.0%	\$ 840.00
Chelmer	-10.5%	57.8%	\$ 915.00
Indooroopilly	10.3%	66.7%	\$ 700.00
St Lucia	-2.8%	25.0%	\$ 450.00
Taringa	-6.8%	59.4%	\$ 550.00
Toowong	58.1%	10.6%	\$ 459.00
ISHS catchment	16.1%		

Source: Residential Tenancies Authority

2.4.4. Building approvals

Building approvals in Brisbane and the Indooroopilly region significantly affect trends in housing demand and development challenges. Over the past decade, the ISHS catchment area has experienced significant development activity, driven by its proximity to Brisbane's CBD and the appeal of its many retail, commercial, and recreational hubs. Housing development has focused on medium to high-density options like units and townhouses. Recent sales data indicates high activity in unit sales, with these properties spending fewer days on the market compared to houses. This highlights residents' preference for compact, affordable housing in a region with limited land for expansion. However, approvals for new projects face challenges due to regional planning restrictions and are exacerbated by the broader economic pressures creating construction delays and rising construction costs.

Across Brisbane, approvals have fluctuated over the past decade due to shifts in population growth, housing affordability, and economic conditions. Recent data shows a decline in approvals, with only 34,060 dwellings approved across Queensland for the year ending September 2023 - an 8% drop compared to previous years. This figure falls short of the estimated 48,000 homes required annually to meet population needs.

Table 8: Building Approvals by SA2, Indooroopilly catchment, Jul 2022 to Sep 2024

SA2	New houses	New other residential building	Value of new houses	Value of new other residential building
	no.	no.	\$'000	\$'000
Chapel Hill	31	17	\$ 26,506	\$ 9,876
Chelmer - Graceville	45	0	\$ 34,597	\$ -
Indooroopilly	47	230	\$ 48,920	\$ 92,003
St Lucia	25	15	\$ 28,018	\$ 5,500
Taringa	22	16	\$ 18,570	\$12,893
Toowong	26	557	\$ 26,526	\$ 319,357
Total	196	835	\$ 183,136	\$ 439,629

Source: Australian Bureau of Statistics, 8731.0

There are currently seven proposed major high-density residential developments incorporating 770 apartments which have been submitted to Council but not yet approved across the ISHS catchment area.⁵ Despite rising housing demand, the area faces significant supply constraints due to its established "blue-chip" residential status and limited availability of new development land. While some high-quality apartment projects have been completed, future supply in the region is projected to remain tight. This undersupply has contributed to rising property prices, with median house and unit prices across the ISHS catchment being higher than the median across the whole of the Brisbane City Council region.

⁵ Brisbane Development Map, <https://brisbaneddevelopment.com/brisbane-development-map/>

Table 9: Median house and unit prices by SA2, Indooroopilly catchment, June 2024

SA2	House			Unit		
	Median house price	Growth 2019-24 p.a.	Growth 2023-24	Median house price	Growth 2019-24 p.a.	Growth 2023-24
Chapel Hill	\$ 1,415,000	12.2%	12.1%	n/a	n/a	n/a
Chelmer	\$ 1,290,000	8.6%	7.5%	\$ 630,000	8.5%	20.0%
Indooroopilly	\$ 1,487,500	10.5%	26.9%	\$ 660,000	5.3%	13.8%
St Lucia	\$ 1,762,500	11.5%	5.1%	\$ 618,500	3.9%	9.0%
Taringa	\$ 1,525,000	14.3%	2.2%	\$ 631,000	8.6%	22.1%
Toowong	\$ 1,520,000	11.3%	10.0%	\$ 620,000	6.4%	16.2%
Brisbane City Council	\$ 1,140,000	11.2%	16.3%	\$ 607,770	6.2%	15.3%

Source: Department of Resources, Office of the Valuer-General, Property Sales.

3. School enrolment trends

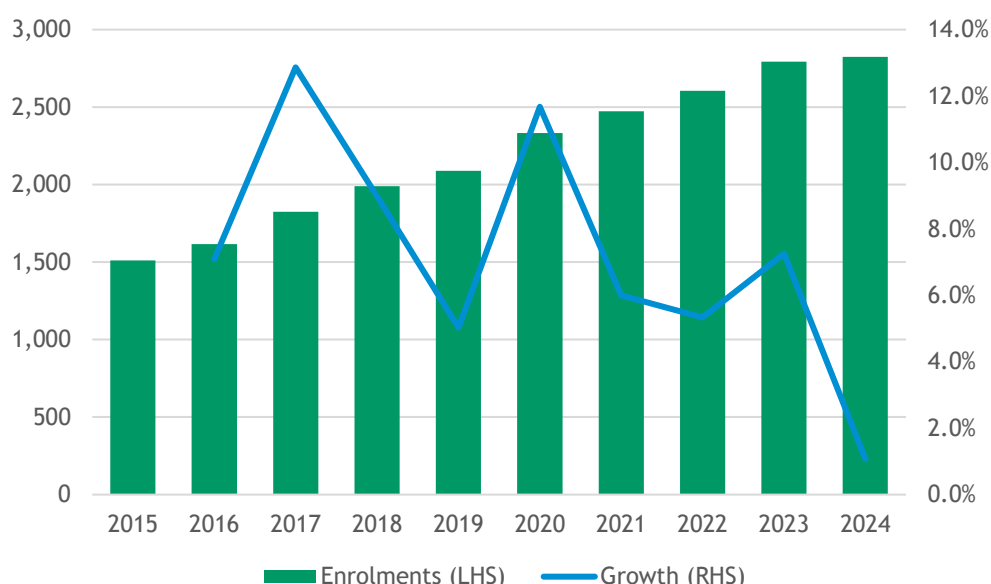
3.1. Historical enrolment data

3.1.1. Total enrolments

Enrolments at ISHS have experienced significant growth over the past decade, with an average annual increase of 7.2% between 2015 and 2024. During this period, student numbers rose from 1,510 in 2015 to 2,824 in 2024, reflecting the school's growing appeal and the area's demographic shifts. However, growth has moderated in recent years, to 4.5% per annum between 2021 and 2024.

Over the last 12 months, enrolment growth dropped further to grow at just 1.1%, driven by the implementation of EMPs that has reduced the intake of out-of-catchment students. This policy has helped manage capacity pressures, signalling a shift towards stabilising enrolments, particularly as the school has exceeded current capacity.

Figure 10: ISHS enrolments, 2015 to 2024

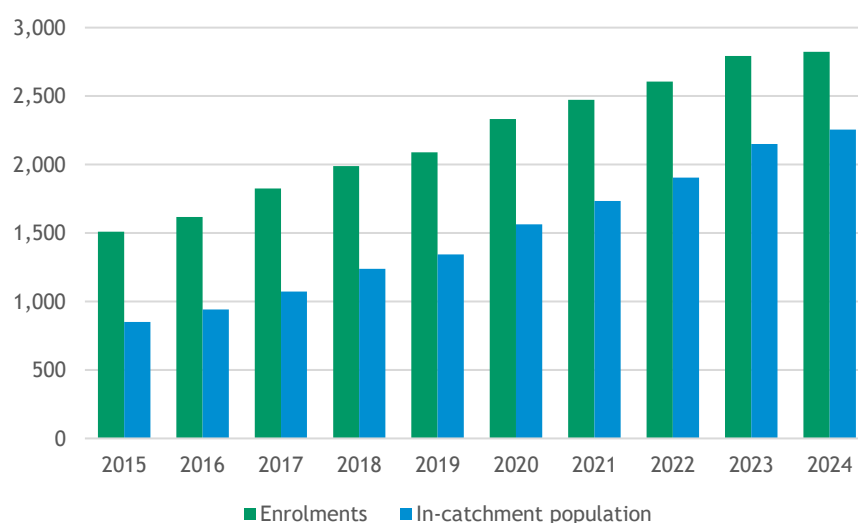


Source: Department of Education

3.1.2. In-catchment enrolments

The enrolment growth at ISHS since 2015 has been primarily driven by the significant increase in the number of in-catchment resident state school students. Between 2015 and 2024, the in-catchment student population grew from 850 to 2,255, representing an annual growth rate of 11.5%. From 2019 to 2024, the growth rate of the in-catchment population remained strong at 9.2% per annum, while actual ISHS enrolments grew at a slightly slower rate of 4.5% per annum during the same period.

Figure 11: Growth in ISHS enrolments and in-catchment population, 2015 to 2024



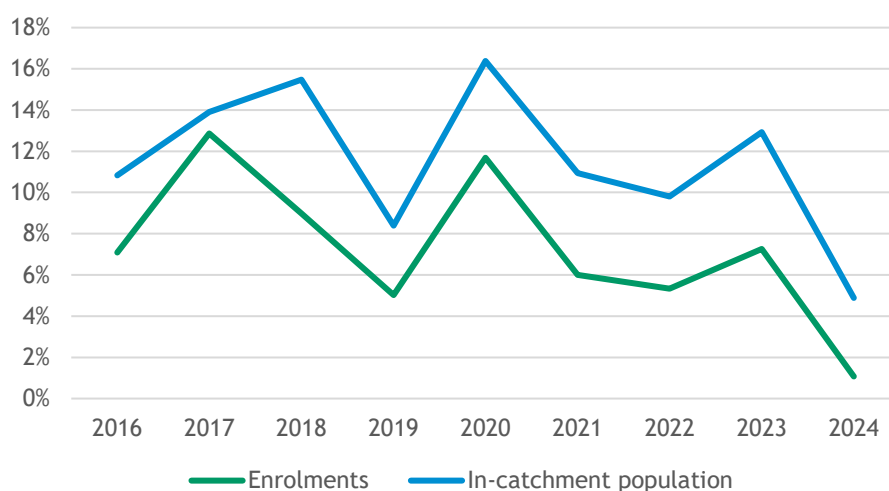
Source: Department of Education

Since 2016, the growth in enrolments at ISHS has closely mirrored the trend in the in-catchment population growth (see Figure 12). However, the in-catchment population has consistently grown at a rate 3-5% higher than the enrolments. Consequently, the ratio of enrolments to the in-catchment population has shifted from 5:3 to 5:4, indicating that while the school is accommodating more local students, the population growth is outpacing enrolment increases.

This trend suggests that the school may face ongoing pressure to expand its capacity and resources to keep up with the rising local demand. The consistent higher growth rate of the in-catchment population underscores the need for strategic planning to ensure that the school can continue to provide quality education to all eligible students.

However, if the rate of growth in the in-catchment population continues to decline, it could have several implications for enrolments at ISHS over the next five years. A slower growth rate in the local population might lead to a stabilisation or even a slight decrease in the number of new in-catchment enrolments. This could result in a more manageable and predictable student population, allowing the school to better allocate resources and maintain a high standard of education without the pressure of rapidly increasing numbers.

Figure 12: Growth rates comparisons, enrolments and in-catchment population, 2016 to 2024

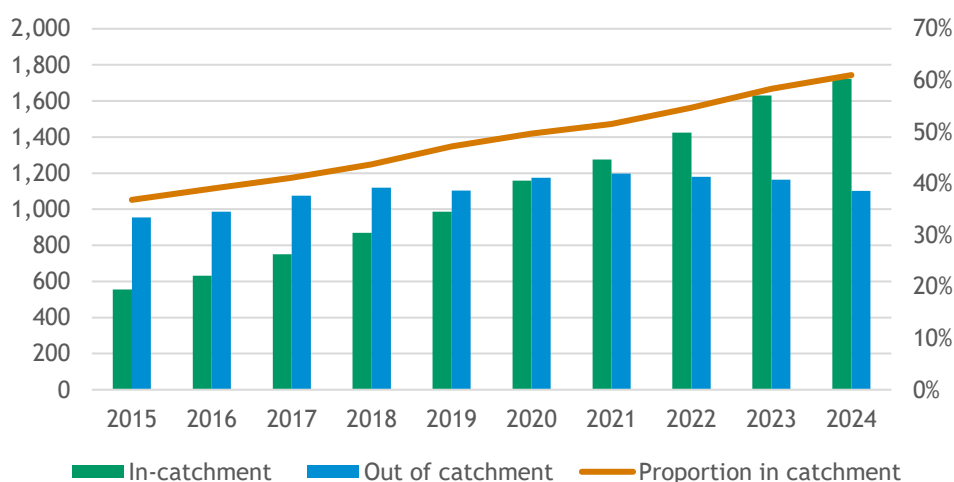


Source: Department of Education

The proportion of in-catchment enrolments at ISHS has seen a significant rise, increasing from 37% in 2015 to 61% in 2024. This shift indicates a growing preference among local families for the school, driven by its reputation and the quality of education it offers. As the proportion of in-catchment students continues to rise, it is likely that this trend will further influence the school's enrolment patterns. The increasing local demand suggests that the school will need to continue prioritising in-catchment enrolments to accommodate the growing number of resident students.

In contrast, the number of out-of-catchment enrolments has started to see a decline. After reaching a peak of 1,198 students in 2022, this number decreased to 1,101 by 2024. Again, this reduction reflects the impact of the EMP, which aims to prioritise in-catchment students and manage the school's capacity effectively. The EMP has played a crucial role in shaping the enrolment dynamics at ISHS, ensuring that the growing demand from local families is met while maintaining a balanced and sustainable student population.

Figure 13: Number of enrolments by catchment status, 2015 to 2024

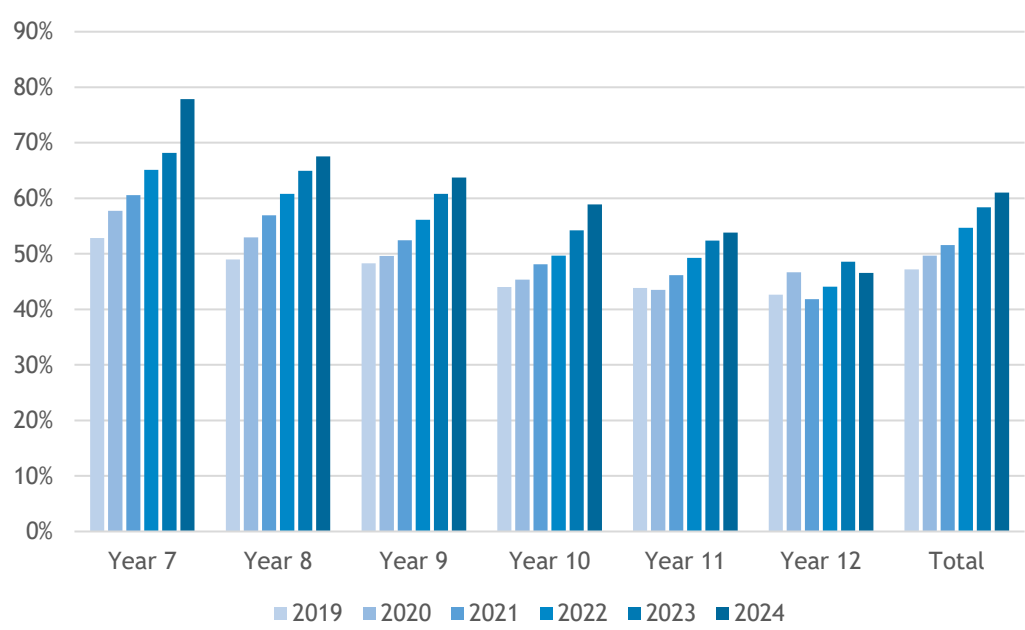


Source: Department of Education

Figure 14 highlights a steady increase in the percentage of in-catchment enrolments across all year levels at ISHS from 2019 to 2024. The most significant growth is seen in Year 7, where in-catchment enrolments rose from 53% in 2019 to 78% in 2024, reflecting a strong shift towards prioritising local students. Year 8 and Year 9 also experienced notable increases, reaching 68% and 64%, respectively, by 2024.

While the growth is more gradual in the senior year levels, consistent upward trends are evident. Year 10 increased from 44% in 2019 to 59% in 2024, Year 11 rose from 44% to 54%, and Year 12 saw a smaller increase from 43% to 47%. Overall, the total proportion of in-catchment enrolments grew from 47% in 2019 to 61% in 2024, demonstrating the school's evolving focus on local enrolments and the effectiveness of Enrolment Management Plans in catering to in-catchment population.

Figure 14: Proportion of In-catchment enrolments by Year level, 2019 to 2024



Source: Department of Education

3.1.3. Catchment flows

The enrolment data for ISHS in 2024 (see Table) indicates strong retention within its catchment, with 1,723 students (61%) residing and enrolling in-catchment. However, the school also attracts significant inflows from surrounding areas:

- 671 students come from the top 3 catchments listed for out of catchment students.
- 275 students from the remainder of the top ten catchments, including Glenala SHS and Forest Lake SHS
- 179 students from across the other 47 local high school catchments.

This reflects ISHS’s strong appeal locally and its reputation as a leading education provider regionally. ISHS maintains high in-catchment enrolments while also attracting students outside the catchment’s student population, despite competition from specialised programs and neighbouring schools.

Regarding student outflow, 227 students from the ISHS catchment opted for the Queensland Academy for Science, Mathematics and Technology (QASMAT), while 61 chose Brisbane State High School, and 58

selected Kenmore State High School. Other specialised institutions, including Kelvin Grove State College and Queensland Academy for Creative Industries, accounted for smaller in-catchment outflow enrolments. The outflow patterns suggest that while ISHS retains most of its catchment population, specialised schools such as QASMAT and Queensland Academies, as well as other nearby state schools, remain attractive alternatives for certain student cohorts, particularly those seeking specific programs or pathways.

Table 9 provides more detailed information on the location of the enrolment inflows and outflows for the ISHS catchment.

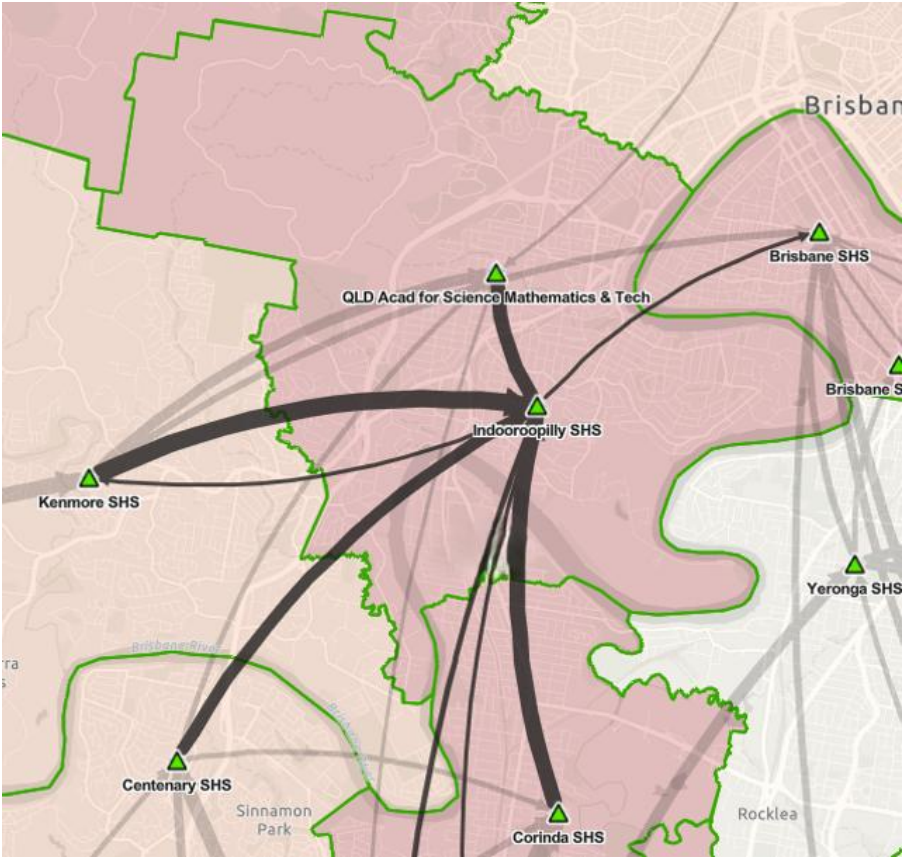
Overall, the inflow and outflow trends of the ISHS catchment area underscores the importance of the school’s EMP in balancing regional demand with the underlying educational needs of local students.

As the DoE’s actual historical data does not show significant shifts in these outflows, they serve as a reasonable benchmark for projecting future trends. For the forecast scenarios, BDO considered factors such as broader migration patterns and regional demographic shifts. There is no strong evidence to suggest that these outflows will dramatically change in the near term. However, if there were any changes to the out-flow options available, i.e. re-location of QASMAT for example, then this would require a review under the adaptive planning mechanisms to determine the possible effects on ISHS enrolments.

ISHS Enrolment Inflows		ISHS Enrolment Outflows	
Catchment	2024	Catchment	2024
Indooroopilly State High School	1,723	QASMAT	227
Kenmore State High School	322	Brisbane State High School	61
Corinda State High School	192	Kenmore State High School	58
Centenary State High School	157	Kelvin Grove State College	36
Glenala State High School	73	Queensland Academy for Creative Industries	34
Forest Lake State High School	63	Brisbane South State Secondary College	20
Kelvin Grove State College	31	Corinda State High School	19
Other catchment	263	Other catchment	77

Source: Department of Education

Figure 15: Catchment flows for ISHS, 2024



Source: Department of Education

3.2. Transition rates

The number of primary school students transitioning from ISHS feeder schools to Year 7 at ISHS between 2018 and 2023 indicate an improving rate of transition. In 2018, the transition rate was -29%, meaning 29% of in-catchment State primary school Year 6 students did not progress to ISHS in Year 7 - by 2023, this figure had improved to -18%. However, in 2024, the transition rate dropped again to -24%. This suggests a persistent challenge of ISHS in retaining Year 6 students within the feeder schools, with shifts to other educational institutions or pathways at the secondary school entry point.

Table 11: Transition rates of primary school enrolments in ISHS feeder schools by Year level, 2018 to 2024

Year	PY	Yr 1	Yr 2	Yr 3	Yr 4	Yr 5	Yr 6	Yr 7	% Y6 to Y7
2018	481	446	442	484	439	373	353	233	-29%
2019	497	494	454	459	501	446	401	254	-28%
2020	493	527	512	490	461	475	441	316	-21%

Year	PY	Yr 1	Yr 2	Yr 3	Yr 4	Yr 5	Yr 6	Yr 7	% Y6 to Y7
2021	544	499	517	537	497	450	467	341	-23%
2022	437	558	498	542	548	479	468	384	-18%
2023	413	460	584	513	575	534	512	383	-18%
2024	401	439	494	592	531	559	543	389	-24%

Source: Department of Education

As a result of its reasonably strong year-to-year retention rates, ISHS has undergone a notable shift in enrolment patterns between 2018 and 2024, characterised by a declining reliance on in eligible out-of-catchment (OOC). By 2024, 96% of new Year 7 enrolments at ISHS came from Year 6 students attending primary schools within the catchment, a significant shift from 2019, when 35% of Year 7 enrolments were from OOC primary schools. This decline in OOC enrolments highlights two key trends: first, the increasing attractiveness of ISHS to local families, as more in-catchment students are choosing to remain within the government school system; and second, the effectiveness of the Enrolment Management Plan (EMP) in prioritising enrolments for students residing within the catchment. These factors suggest that ISHS is consolidating its role as the preferred secondary school option for local families, reinforcing the impact of rising government school preference and more stringent enrolment policies on shaping future enrolment patterns.

Furthermore, enrolments consistently increased between Years 7 to 11, with cohorts growing as they progress through the school. For instance, the 2020 Year 7 cohort expanded from 431 students to 513 students by Year 11 in 2024. However, there is a noticeable drop in enrolments between Years 11 and 12, with Year 12 enrolments declining by an average of 7% per year since 2019. This drop-off may be attributed to other factors beyond individual school facilities and offerings, including students transitioning to alternative pathways such as vocational education, traineeships, apprenticeships, or early entry into the workforce. Additionally, academic pressure or personal circumstances could contribute to some students opting out before completing Year 12. This trend underscores the importance of targeted support and engagement strategies to retain students through to completion of their secondary education.

Table 12: Retention of ISHS school enrolments by Year level, 2018 to 2024

Year	Year 7	Year 8	Year 9	Year 10	Year 11	Year 12	% OOC Y7
2018	394	383	355	315	235	307	
2019	390	396	383	334	349	237	35%
2020	431	425	407	368	370	332	27%
2021	454	439	446	393	392	349	25%

2022	459	464	463	455	408	356	16%
2023	449	488	482	496	498	381	15%
2024	407	459	510	482	513	453	4%

Source: Department of Education

3.3. Catchment movements

ISHS slowly reduced the number of new enrolments from OOC between 2019 to 2023 that did not meet approved exemptions under the school Enrolment Management Plan (EMP). In 2024, new enrolments across all year levels at ISHS primarily consisted of eligible students from within the catchment area, reflecting compliance with the EMP. Out of 663 total new students, 555 were in-catchment residents, thus accounting for the majority of enrolments.

However, total OOC enrolments will take several years to reduce with continuing students and a range of other students considered eligible out of catchment enrolments. Additional eligible categories included students under CRICOS (international student program), disability programs, and Department of Child Safety placements, collectively accounting for a small number of enrolments (13 students). Staff children (8 students) and those with eligible siblings (49 students) also contributed to the total.

Eligibility	Reason	Year 7	Year 8	Year 9	Year 10	Year 11	Year 12	Total
Eligible	CRICOS	1		1	1	1		4
	Disability	5						5
	DOCs			2		1	1	4
	Exclusion				1			1
	In catchment	321	54	59	52	57	12	555
	Previous/alternate address in catchment	17			1	1	1	20
	Staff	7	1					8
	Eligible sibling at same address	48	1					49
Not Eligible	Not eligible	2						2
	Program of Excellence				2	5		7

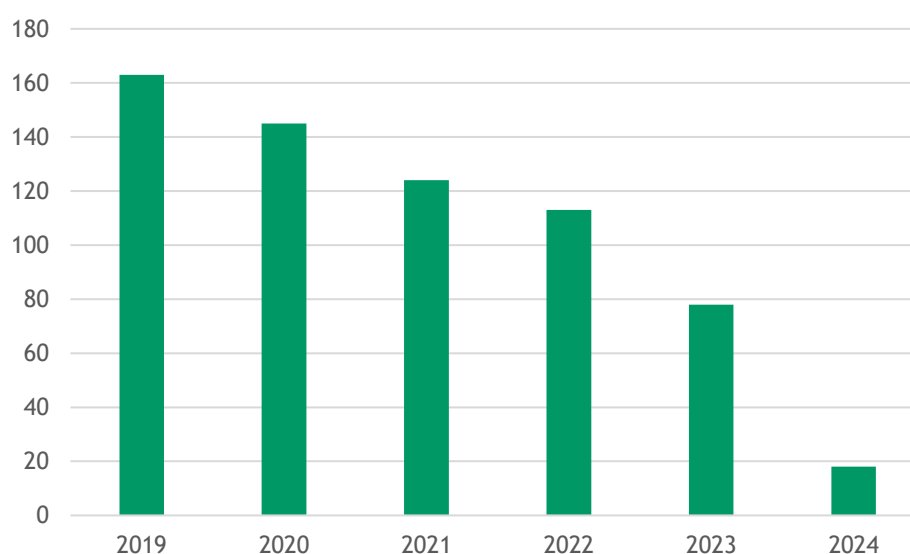
	Sibling is not eligible	6		2				8
	Total new students	407	56	64	57	65	14	663

Table 13: Catchment movements by year level, 2024

Source: Department of Education

Only a minimal number of enrolments were ineligible under the EMP criteria, with two students identified as not meeting any eligibility requirements. Additionally, seven students were enrolled under Programs of Excellence and eight had siblings not deemed eligible, bringing the ineligible total to 17. Despite a decline in new ineligible enrolments since 2019 (see Figure 16), the total number of out-of-catchment enrolments has only dropped by 2 students overall since 2019 (see Figure 13). However, it's also important to note that the total out-of-catchment enrolments have been steadily declining each year since 2022. This means that while the overall reduction since 2019 is small, there has been a consistent downward trend in the past few years. This highlights the importance of strict adherence to EMP policies while accommodating specific exemptions.

Figure 16: New enrolments that do not meet exemption criteria under school EPP (new ineligible enrolments), 2019 to 2024



Source: Department of Education

3.4. Private and public preferences

Across the ISHS catchment, there has been a marked increase in the proportion of secondary students attending government secondary schools. In 2011, only 30% of secondary students within the catchment were enrolled in government schools, but by the 2021 Census, this proportion had risen to 45%. Notably, Chapel Hill saw government school enrolments grow from 41.4% in 2011 to 54.0% in 2021, while Indooroopilly rose from 24.9% to 48.5% over the same period. This trend is consistent across all SA2 regions within the catchment, reflecting a wider shift in school preferences towards public education.

Table 14: Proportion of secondary students attending Government schools 2011-2021

	Chapel Hill	Indooroopilly	St Lucia	Chelmer - Graceville	Taringa	Toowong	Catchment
2011	41.4%	24.9%	26.3%	21.0%	30.8%	30.2%	29.8%
2016	47.4%	36.7%	38.9%	28.6%	44.6%	31.4%	37.8%
2021	54.0%	48.5%	49.4%	31.8%	49.7%	34.7%	44.9%

Source: ABS; Census of Population and Housing

4. Resident Student Number and enrolment forecasts

4.1. Methodology

Current DoE enrolment forecast data are based on the Queensland Government's population projections prepared by the QGSO. However, previous analysis conducted by BDO of the QGSO forecasts has identified several limitations in using these as the basis for projecting student enrolments. As a result of these limitations, DoE has since prepared an alternative set of forecasts that used a progression rate model based on actual prior year enrolments which gave them a new set of shorter-term numbers. Consequently, as part of the scope of this report a review of these forecasts has been undertaken.

As part of this study, BDO also developed a set of Resident Student Number (RSN) forecasts, using the Shaping South East Queensland (SSEQ) MULTI forecasts (medium series) as the baseline for scenario modelling. This approach allowed for a more detailed analysis of potential growth trajectories, incorporating multiple demographic and policy assumptions to assess how changing school preferences, migration trends, and enrolment policies could impact future student numbers. Consequently, this report includes a review of DoE's revised forecasts alongside BDO's scenario-based RSN projections to provide a comprehensive assessment of future enrolment patterns.

The differences between the SSEQ and QGSO datasets are covered in Table 15 below.

Table 15: Differences between SSEQ and QGSO population forecasts

Shaping South East Queensland (SSEQ) MULTI forecasts (medium series)	Queensland Government Statisticians Office (QGSO) forecasts (medium series)
The SSEQ forecasts are more localised, concentrating on the specific needs and trends within SEQ. These forecasts are designed to support urban planning, infrastructure development, and environmental sustainability across the region.	The QGSO forecasts are typically used for statewide planning and analysis. They are comprehensive, covering the entire state of Queensland, and are intended to inform a wide range of policy decisions, from infrastructure planning to service delivery.
The methodology for Shaping SEQ incorporates additional factors relevant to regional planning, such as land use patterns, housing availability, economic conditions, and infrastructure capacities. It may use	QGSO typically uses a cohort-component model for population projections, which considers factors such as fertility, mortality, and migration. The methodology is

Shaping South East Queensland (SSEQ) MULTI forecasts (medium series)	Queensland Government Statisticians Office (QGSO) forecasts (medium series)
more dynamic models that reflect the specific urban and environmental challenges of the SEQ region, and it often involves scenario planning to consider different growth pathways.	standardised and consistent across the state, aiming to provide a reliable long-term view of population trends
Uses more region-specific data inputs, such as local infrastructure projects, housing developments, and environmental constraints. The assumptions might also be more regionally nuanced, reflecting the unique characteristics and policy goals of the SEQ region.	Uses a wide range of demographic and economic data inputs, including historical population data, birth and death rates, migration patterns, and economic indicators. The assumptions are generally conservative and based on historical trends.
The latest SSEQ forecasts were based on 2022-23 ABS Regional Population by age and sex data and has taken into account the increase in population growth that occurred post 2021.	The QGSO forecasts used were based on 2021 ABS Regional Population by age and sex data and did not consider the significant increase in population growth that occurred in the post 2021.

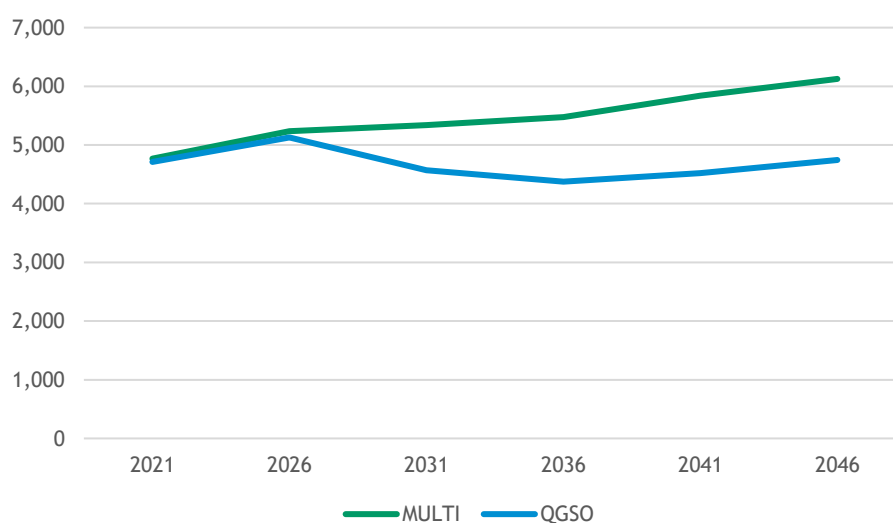
4.2. Resident Student Number forecasts

4.2.1. Current Queensland Government forecasts

The forecast numbers for the total secondary school-aged (12-17-year-old) students residing in the ISHS catchment from 2021 to 2046 vary between the two data models (QGSO, and the Shaping SEQ MULTI data model - medium forecast series). According to the MULTI model, the number of students is expected to steadily increase from 4,768 in 2021 to 6,126 in 2046, with a consistent upward trend each year. In contrast, the QGSO forecast shows a different pattern, with student numbers growing to a peak of 5,129 in 2026 before declining to 4,743 in 2046, indicating a decrease in the number of students in the later years of the projection.

These differing projections highlight the impact of varying assumptions, such as migration patterns and fertility rates, used in the two models. The MULTI forecast suggests more sustained growth, while the QGSO forecast anticipates a potential decline in the secondary school-aged population, especially beyond 2031.

Figure 17: Forecast Resident Student Numbers, ISHS Catchment, QGSO and MULTI, 2021 to 2046



Source: TMR Shaping SEQ, QGSO

4.2.2. New secondary school-age population forecasts for ISHS catchment

BDO developed a set of forecasts for the total secondary school-age population to evaluate the accuracy and relevance of the Department of Education's existing projections. The methodology began with updated Estimated Resident Population (ERP) data for 2021, 2022, and 2023, focusing on the 10-19 age group within the in-catchment SA2 areas. Using 2021 Census data, age-specific adjustments were applied to refine the baseline 2021 figures, ensuring a robust starting point for the forecast series.

Forecasts were initially generated for the Brisbane GCCSA, with demographic trends and growth patterns from the source datasets in Table 1, serving as a regional context. Further refinements incorporated distributions from QGSO, Shaping SEQ, Census data, building approvals, and local development information to estimate the share of GCCSA growth attributable to the ISHS catchment.

To finalise the projections, growth trends from these diverse data sources were integrated with the updated ERP baseline, producing three forecast scenarios tailored to the ISHS catchment. By using forecasts based on multiple varying inputs, such as migration patterns and fertility rates, the scenarios identify the potential impact of differing assumptions inherent in the models. This approach provides a nuanced understanding of how changes in key variables could shape future resident student numbers.

More information around the methodology and the assumptions used can be found in Appendix A.

These scenarios illustrate how different demographic assumptions can affect resident student population projections over time. The forecasts for the ISHS catchment show varying growth trajectories based on the scenario:

- **Low Scenario:** Secondary school-age population numbers start at 4,657 in 2021 and grow modestly to 5,507 by 2046, reflecting a conservative growth rate driven by subdued migration or fertility assumptions.
- **Medium Scenario:** Numbers increase from 4,657 in 2021 to 5,781 in 2046, representing moderate growth aligned with balanced demographic trends.

- **High Scenario:** Forecasts project growth from 4,657 in 2021 to 6,054 in 2046, driven by higher assumptions of migration and fertility rates.

Table 16: Total secondary school-age population forecasts (12-17 years), ISHS catchment, 2021-2046

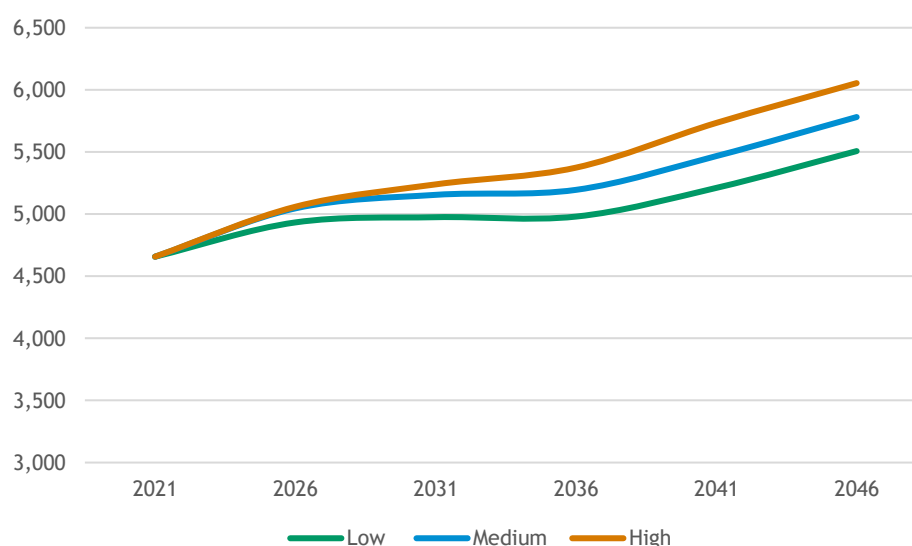
Scenario	2021 (actual)	2026	2031	2036	2041	2046
Low	4,657	4,933	4,975	4,980	5,211	5,507
Medium	4,657	5,046	5,155	5,195	5,467	5,781
High	4,657	5,059	5,239	5,374	5,734	6,054

Source: BDO, ABS; Centre of Population Projections

As shown in Table 16, the growth rates (CAGR) for all scenarios show strong growth between 2021 and 2026, followed by a significant slowing from 2026 to 2036. Growth rates are lowest during the 2031-2036 period, ranging from 0.2% in the Low Scenario to 0.5% in the High Scenario. However, growth is expected to recover post-2036 across all scenarios, with CAGRs returning to between 1.0% and 1.3% between 2036-41, settling at a longer term 1.1% p.a.

The slowing growth between 2026 and 2036 can be attributed to demographic factors such as declining fertility rates and reduced natural increase that can be seen in the declining birth rates across the catchment. There is also low net internal migration coming into the catchment leading to a stagnation in migration flows (apart from overseas students), particularly if migration trends are impacted by any policy changes or economic conditions. Post-2036, growth is expected to return to historical levels across the region. These trends highlight the sensitivity of long-term projections to shifts in key demographic and socioeconomic factors.

Figure 18: School-age population growth (12-17 years) by scenario, ISHS catchment, 2021-2046



Source: BDO, ABS; Centre of Population Projections

4.2.3. RSN forecasts for ISHS catchment

The RSN projections are based on the key assumption that the preference for government schools within the ISHS catchment will continue to grow significantly over the forecast period. This preference directly affects the proportion of the ISHS catchment secondary school-age population attending state schools, which in turn drives the enrolment forecasts.

The growth assumptions in the preference rate for Government schooling are as follows:

- **Low-growth scenario:** The preference rate remains constant at 44.9% throughout the period.
- **Medium-growth scenario:** The preference rate is expected to increase gradually, reaching 50.9% by 2046.
- **High-growth scenario:** The preference rate is projected to rise steadily from 44.9% in 2021 to 57.5% by 2046, consistent with historical growth.

The projected shifts in the high- and medium-growth scenarios reflect broader trends favouring government schooling, driven by factors such as affordability, perceived quality improvements, and demographic changes within the catchment. Consequently, the number of resident students attending government schools is expected to rise to 2,473 under the low-growth scenario, 2,941 under the medium-growth scenario, and 3,486 under the high-growth scenario by 2046. These projections highlight the Department of Education's pivotal role in shaping future enrolment trends within the ISHS catchment.

Table 17: Resident Student number (RSN) forecasts by attendance at Government School (12-17 years), ISHS catchment, 2021-2046

Scenario	2021 (actual)	2026	2031	2036	2041	2046
Low	2,090	2,215	2,234	2,236	2,344	2,473
Medium	2,090	2,323	2,433	2,514	2,712	2,941
High	2,090	2,338	2,598	2,802	3,141	3,486

Source: BDO, ABS; Centre of Population Projections

4.2.4. Stability of 12 to 17-year-old cohort in the RSN projections

Despite the recent decline in the 0 to 4-year-old population, projections for the 12 to 17-year-old cohort indicate a stabilisation rather than a corresponding decline, with numbers expected to level off in the mid-2030s. This stability can be attributed to several factors. First, population momentum ensures that children already in the pipeline (those aged 5-11) remain unaffected by the recent drop in births, helping maintain stability in the 12-17 cohort over the medium term. Second, migration patterns, particularly internal migration, and to a lesser extent international migration, support the 12-17 age group as families with school-aged children move into the catchment area. New developments, including increases in family-friendly housing stock and the growth of apartment living near Indooroopilly, Toowong, and Taringa, are also expected to attract younger families, further bolstering the school-aged population. The strong local reputation of schools like Indooroopilly State High School also draws families specifically seeking quality secondary education opportunities, which helps offset declines from earlier birth cohorts.

Finally, forecast models often employ smoothing techniques to mitigate sharp year-on-year fluctuations, masking the immediate impact of smaller cohorts moving through the system. These combined factors contribute to the stability of the 12-17-year-old cohort in the projections, despite recent declines in younger age groups.

4.3. ISHS Enrolment forecasts

4.3.1. Current DoE forecasts

DoE recently developed a new set of enrolment forecasts for ISHS to address the limitations of the QGSO projections, which had anticipated weak growth in the catchment population.

These forecasts were based on the following key assumptions:

- Using February Census enrolment data as the baseline.
- Accounting for continued short-term growth in in-catchment Year 7 cohorts.
- Reflecting high compliance with the school's EMP, which impacts:
 - Year 7 intakes.
 - Stabilises Year 8-12 growth within existing cohorts.
- Supporting ongoing trends of attracting in-catchment students.
- Despite a current ~20% of in-catchment students attending other local schools, the forecasts project a gradual reduction in in-catchment enrolments over time.

This methodology produced a set of enrolment forecasts that anticipate a relatively stable total student population fluctuating between 2,824 and 2,887 students from 2024 to 2029, as shown in Table 18.

Table 18: Latest DoE enrolment forecasts for ISHS 2024 to 2029

Service Planning team enrolment forecasts							
Year	Yr 7	Yr 8	Yr 9	Yr 10	Yr 11	Yr 12	Total
2024 (actual)	407	459	510	482	513	453	2,824
2025	447	425	478	513	509	484	2,856
2026	471	465	444	481	540	480	2,881
2027	430	489	484	447	508	511	2,869
2028	491	448	508	487	474	479	2,887
2029	425	509	467	511	514	445	2,871

Source: Department of Education

4.3.2. Enrolment forecasts using progression rates

As part of the review of the new DoE forecasts, BDO also developed a set of enrolment forecasts using progression rates of in-catchment students and the retention and transition rates of current enrolments at ISHS. This method provides a set of forecasts that is very similar to the DoE forecasts covered above.

Table 19: BDO enrolment forecasts for ISHS based on historical progression and retention rates, 2025 to 2029

Year	Year 7	Year 8	Year 9	Year 10	Year 11	Year 12	Total
2025	462	419	478	520	507	478	2,864
2026	477	475	436	488	547	472	2,896
2027	453	490	495	445	513	510	2,907
2028	505	466	511	505	468	478	2,933
2029	421	519	485	521	532	436	2,915

Source: BDO, Department of Education, ABS, Centre of Population Projections

4.3.3. Enrolment forecasts using new in-catchment state school resident student numbers

Forecasting enrolments for ISHS using scenario-based projections of in-catchment resident student numbers provides a critical framework to anticipate future demand. These forecasts focus on two primary factors: the increasing preference for government secondary schools within the catchment, and the evolving proportion of OOC enrolments. Recent trends show a significant rise in the proportion of local families opting for government schools, reshaping enrolment patterns at ISHS. Concurrently, the school's stricter adherence to its Enrolment Management Plan (EMP) has reduced OOC enrolments, enhancing the focus on in-catchment students. By modelling different scenarios, these forecasts aim to offer a comprehensive understanding of how demographic shifts and policy decisions will influence future enrolments.

To explore the potential impacts of changing preferences and OOC enrolments, two sets of enrolment forecasts (Option 1 and Option 2) have been developed for each resident student number (RSN) forecast scenario. These options consider varying assumptions regarding government school preferences, in-catchment RSN enrolments, and OOC enrolments.

Option 1:

- The percentage of ISHS enrolments from in-catchment RSNs remains constant at 76.4% across all years
- The proportion of OOC enrolments remains steady at 39% of total enrolments.

Option 2:

- The proportion of ISHS enrolments from in-catchment RSNs grows by 1% per annum, rising from 76.4% in 2024 to 80.3% by 2029, consistent with historical growth

- OOC enrolments as a percentage of RSN enrolments decrease by 8%, declining from 39% of total enrolments in 2024 to 29.6% in 2029, consistent with recent trends.

Each option is applied to the high, medium, and low RSN growth scenarios, enabling a range of projections that reflect varying assumptions about future demographic and policy trends. This approach highlights how shifts in school preference and OOC enrolments could affect ISHS enrolment patterns, ensuring the school can adapt to a dynamic and evolving catchment.

BDO's analysis considered total out-of-catchment (OOO) enrolments rather than distinguishing between eligible and non-eligible OOC enrolments. The enrolment forecast scenarios (High, Medium, Low) reflect overall OOC enrolment trends but do not apply separate assumptions for eligible vs. non-eligible students.

5. Summary and results

A set of secondary school-age population forecasts were created for the ISHS catchment under three distinct scenarios to assess future enrolment trends. The results highlight varying growth trajectories depending on different assumptions about migration, fertility rates, and the increasing preference for government schooling.

The forecasts were tailored to reflect the catchment's current and future demographic trends. Three scenarios were outlined:

- **Low Scenario:** Total secondary school-age numbers grow from 4,657 in 2021 to 5,507 by 2046, reflecting modest growth with subdued migration and fertility assumptions.
- **Medium Scenario:** Numbers increase from 4,657 in 2021 to 5,781 by 2046, reflecting moderate growth aligned with balanced demographic trends.
- **High Scenario:** Forecasts project growth from 4,657 in 2021 to 6,054 by 2046, driven by higher migration and fertility rates.

Growth rates are expected to remain strong between 2021 and 2026, slow between 2026 and 2036 due to declining fertility rates and stagnating migration flows, and then recover post-2036, returning to historical levels.

The projections also take into account the growing preference for government schools within the ISHS catchment. This preference is anticipated to increase over time, with:

- **Low-growth scenario:** Preference remains steady at 44.9%.
- **Medium-growth scenario:** Preference reaches 50.9% by 2046.
- **High-growth scenario:** Preference rises to 57.5% by 2046.

As a result, the number of resident students attending government schools (RSNs) is expected to reach:

- **2,473** under the low-growth scenario.
- **2,941** under the medium-growth scenario.
- **3,486** under the high-growth scenario by 2046.

A set of short-term enrolment forecasts were also created based on these RSN numbers.

The results of the various scenarios and options are shown in Table 20. The enrolment forecasts for ISHS between 2025 and 2029 reflect varying outcomes across high, medium, and low growth scenarios, with distinct trends emerging under each scenario's two options.

Option 1 projects steady growth across all scenarios:

- **Low scenario:** Enrolments increase from 2,765 in 2025 to 2,814 in 2029, indicating slower but consistent growth.
- **Medium scenario:** Enrolments rise from 2,844 in 2025 to 3,016 in 2029, reflecting moderate growth.
- **High scenario:** Enrolments grow from 2,905 in 2025 to 3,175 in 2029, showing the largest increase.

Option 2, with a focus on reduced out-of-catchment enrolments and higher in-catchment retention, shows stability with minimal growth:

- **Low scenario:** Enrolments decrease from 2,705 in 2025 to 2,564 in 2029, reflecting the lowest growth trajectory.
- **Medium scenario:** Enrolments peak at 2,790 in 2026 and decline slightly to 2,748 by 2029.
- **High scenario:** Numbers grow slightly, from 2,842 in 2025 to 2,886 in 2029.

Overall, Option 1 forecasts higher enrolment growth driven by no reduction in the proportion of OOC enrolments.

Option 2, on the other hand, accounts for the impact of prioritising in-catchment students and reducing OOC proportions. These differences underscore the importance of demographic changes and policy assumptions in shaping future enrolment patterns.

Table 20: Enrolment forecast data for ISHS by Scenario and Option, 2025 to 2029

Scenario	Option	2025	2026	2027	2028	2029
High	Option 1	2,905	2,990	3,056	3,114	3,175
	Option 2	2,842	2,867	2,877	2,882	2,886
Medium	Option 1	2,844	2,909	2,955	2,990	3,016
	Option 2	2,783	2,790	2,782	2,767	2,748
Low	Option 1	2,765	2,774	2,801	2,811	2,814
	Option 2	2,705	2,660	2,637	2,602	2,564

Source: BDO, Department of Education, ABS, Centre of Population Projections

When we compare the current DoE enrolments to the BDO forecasts (see Table 21), the DoE numbers fall within the range between the highest and the lowest of all series, as outlined below and in Table 21.

- The DoE forecast for 2029 predicts total enrolments at 2,871 students.
- The DoE figure sits between the two options of BDO's medium-growth scenario - 3,016 students in Option 1 and 2,748 students in Option 2.
- This figure also aligns with the higher end of BDO's low-growth scenario's Option 1 series (2,886 students).

This analysis therefore confirms that the existing DoE ISHS enrolment forecasts are quite reasonable, incorporating the potential drivers and trends of population and enrolment growth for ISHS and its catchment. The results show a level of consistency between the two sources (DoE and BDO), although the specific trends differ. The DoE's projection, which shows a more static trend compared to BDO's estimate, indicates slower growth, reflects the different assumptions used in the various series. BDO's estimate factors in additional variables such as local developments and broader migration trends, which has led to a slightly higher growth forecast.

The core takeaway is that both fall within reasonable error ranges when compared to historical population trends. While they highlight different assumptions about future growth, both forecasts offer reasonable scenarios for planning purposes.

Table 21: Comparisons with DoE ISHS enrolment forecast data, 2025 to 2029

Scenario	2025	2026	2027	2028	2029
Highest enrolment series	2,905	2,990	3,056	3,114	3,175
DoE	2,856	2,881	2,869	2,887	2,871
Lowest enrolment series	2,705	2,660	2,637	2,602	2,564

Source: BDO, Department of Education

The drivers and trends of future enrolments across the ISHS catchment are:

- While the ISHS catchment has experienced sustained total population growth the 0-4 and 5-9-year age groups are exhibiting a decline. This is likely to have downstream effects on future high school enrolment rates. This is further reinforced by the steady decline in both the birth rate and fertility rate across the catchment.
- There has been a rise of the proportion of in-catchment enrolments at ISHS following the implementation of an Enrolment Management Plan. If this continues, this could lead to a more manageable and predictable student population.
- Increases in the proportion of families choosing public education options across the ISHS catchment, increasing the numbers of the State school RSN's eligible for enrolment at ISHS.
- Rising house prices across the catchment may push out or prevent young families who typically have a lower income from purchasing property within the catchment, further reducing the future student cohorts.

Therefore, ISHS enrolments are positioned to grow steadily, particularly under high-growth scenarios, but will require ongoing adjustments to accommodate anticipated demographic shifts and evolving school preferences.

Appendix A RSN and Enrolment methodology

The following section outlines the methodology for the Resident Student Number and enrolment forecasts for Indooroopilly State High School (ISHS).

Figure A1 illustrates the Process Map of the RSN methodology, integrating the assumptions detailed in Table A1.

Population Projections (Top-Down Approach)

Data sources

The forecasts were initially built using population projections from key agencies:

- **ABS:** Australian Bureau of Statistics (National, State and Capital City forecasts)
- **QGSO:** Queensland Government Statistician's Office
- **Centre for Population:** Commonwealth-level population projections
- **ShapingSEQ MULTI:** South East Queensland population projections by Resident Student Numbers (RSN).

Incorporated assumptions

These top-down forecasts integrated assumptions for:

- **Fertility rates:** Expected natural increase through births.
- **Mortality rates:** Population loss through deaths.
- **Migration:** Net internal and overseas migration trends, which significantly influence growth in the Brisbane region.

The methodology for these assumptions are below:

- **ABS:** <https://www.abs.gov.au/methodologies/population-projections-australia-methodology/2022-base-2071#method>
- **Centre for Population:** <https://population.gov.au/publications/statements/2023-population-statement>
- **QGSO:** <https://www.qgso.qld.gov.au/issues/2676/qld-government-population-projections-methodology-assumptions-2023-edn.pdf>
- **Shaping SEQ MULTI:** <https://imoveaustralia.com/wp-content/uploads/2024/11/Insights-into-the-development-of-MULTI-Francis-Selzer-and-Jaco-Van-Den-Berg.pdf>

Purpose

This step provided a consistent population base for Brisbane Capital City, ensuring forecasts aligned with the broader growth trends of the region.

Secondary school-age population and RSN Forecasts

ERP baseline and Census adjustments

- The methodology began with updated Estimated Resident Population (ERP) data for 2021, 2022, and 2023, focusing on the 10-19 age group within the in-catchment SA2 areas.
- Using 2021 Census data, age-specific adjustments refined the baseline figures, ensuring a robust starting point for the forecast series.

Regional context and catchment refinement

- Forecasts were initially generated for the Brisbane GCCSA, incorporating demographic trends and growth patterns from key datasets.
- Distributions from QGSO, ShapingSEQ, Census data, building approvals, and local development information were used to estimate the share of GCCSA growth attributable to the ISHS catchment.

Scenario modelling

- Growth trends from the various data sources were integrated with the ERP baseline, producing three forecast scenarios tailored to the ISHS catchment.
- By incorporating varying inputs, such as migration patterns and fertility rates, the scenarios identified the potential impact of differing assumptions.
- This nuanced approach provided an understanding of how changes in key variables could shape future resident student numbers.

Catchment-Level Forecasting (Bottom-Up Approach)

Focus area

- ISHS catchment projections focused on total secondary-aged resident student numbers (12-17 years).

Data integration

- The ABS Census provided historical population distributions for specific Statistical Area Level 2 (SA2) regions within the ISHS catchment.
- Regional breakdowns and distributions from QGSO and ShapingSEQ were applied to further refine the catchment-level forecasts.
- The integration of data at the SA2 level allowed projections to reflect local population trends rather than relying solely on broader averages.

Outcome

- A forecast of resident student numbers by SA2 area was developed for the ISHS catchment, providing accurate estimates of the secondary school-aged population likely to reside within the catchment boundary.

Scenario-Based Enrolment Forecasts

Enrolments refer to the department's "February Census enrolment, head count". Similarly, the enrolment forecasts refer to the February enrolment figure for each of the forward five years.

Key drivers

- **Changing Preferences:** The proportion of students attending government schools within the ISHS catchment increased from 30% in 2011 to 45% in 2021.
- **Out-of-Catchment Policies:** The Enrolment Management Plan (EMP) has reduced reliance on out-of-catchment (OOC) students, with stricter guidelines limiting new OOC enrolments by 2024.
- **RSN Growth Trends:** Growth is expected to slow between 2026-2031, recovering post-2036 due to demographic factors.

Forecast options

- **Option 1:** Stable OOC enrolments with consistent in-catchment proportions.
- **Option 2:** Gradual increase in in-catchment retention with reduced OOC enrolments.

Data Validation and Adjustment

To ensure accuracy and robustness of forecasts, several validation steps were undertaken.

Historical trends

- The forecasts were compared against historical ERP data released by the ABS.
- This provided a baseline trend for assessing past and future population changes.

Department of Education data

- Data regarding historical and forecast enrolments, transition rates, RSN data and catchment data were used to determine accuracy of forecasts.

Residential development data

- Data regarding building approvals, residential development, and timing of new housing stock was incorporated to match projected growth with expected development timelines.

Scenario modelling

- Growth scenarios were tested to account for uncertainties in population change, such as fluctuations in migration.

Data sources

- While historic population estimates are easy to validate when comparing to ERP data released by ABS, future estimates can differ based on the assumptions relating to natural increase (fertility, mortality) and the effects of migration on levels of growth. The small area distributions in intercensal years are validated using aerial imagery and are updated and adjusted for each release of ABS measures of growth. Where possible, we verify development and construction information to ensure residential development timing is as accurate as possible.

- Comparisons are made where possible with other forecasts produced by State and Commonwealth agencies such as QGSO and the Centre for Population. This provides a “sensitivity check” and the process of comparison also ensures certainty around underlying assumptions.
- Sources used in the compilation of these forecasts include:
 - ABS - National, State and Territory, Capital City Population
 - ABS - Population Projections
 - ABS - Births
 - ABS - Migration
 - ABS - Regional Population
 - ABS Census of Population and Housing
 - ABS - Building approvals
 - QGSO - Population Projections
 - TMR - ShapingSEQ MULTI forecast data for secondary RSN
 - Department of Home Affairs Immigration and visa data
 - ACARA enrolment data
 - Department of Education internal datasets
 - Various - Residential development information
 - Property data relating to vacancy rates, land uptake, land availability,
 - Various - Cadastral and other land use data, local and State government planning data, residential development masterplans where applicable

Exclusions

Rental Turnover:

While rental turnover patterns and strategic short-term leasing to secure enrolments are acknowledged as a behaviour observed by some families, BDO’s modelling did not explicitly quantify this effect due to:

- Lack of reliable long-term data on rental-driven enrolments.
- Challenges in isolating temporary renters from permanent in-catchment residents in available datasets.

Given the concerns raised, a targeted survey or data analysis on rental turnover and in-catchment retention rates could be beneficial.

Types of enrolments:

The following types of enrolments were not specifically considered in the development of the forecasts. The numbers of enrolments under each of these categories were incorporated into the forecasts as either an in-catchment or OOC enrolment.

- International Students
- Deaf and Hard of Hearing students

- OOC enrolments for humanitarian reasons

BDO's analysis also considered total out-of-catchment (OOC) enrolments rather than distinguishing between eligible and non-eligible OOC enrolments. The enrolment forecast scenarios (High, Medium, Low) reflect overall OOC enrolment trends but do not apply separate assumptions for eligible vs. non-eligible students.

Cost of Living impacts on School Preference

The cost-of-living crisis was not explicitly incorporated because the forecasts are long-term and based on historical preference trends rather than short-term economic conditions. However, sensitivity analysis is planned to evaluate the impact of potential fluctuations in school preference rates. This ensures that if economic pressures do result in a more sustained shift toward government schools, the implications for enrolment projections can be properly assessed and incorporated.

Family composition

The impact of families moving in with grandparents was not explicitly factored into the forecast scenarios, as only 3% of families in the catchment were classified as "other family" types in 2021 and only 1.3% were multi-family households. As there is no strong data indicating this is a significant driver of enrolment growth this has not been considered a significant factor in the forecasts.

Conclusion

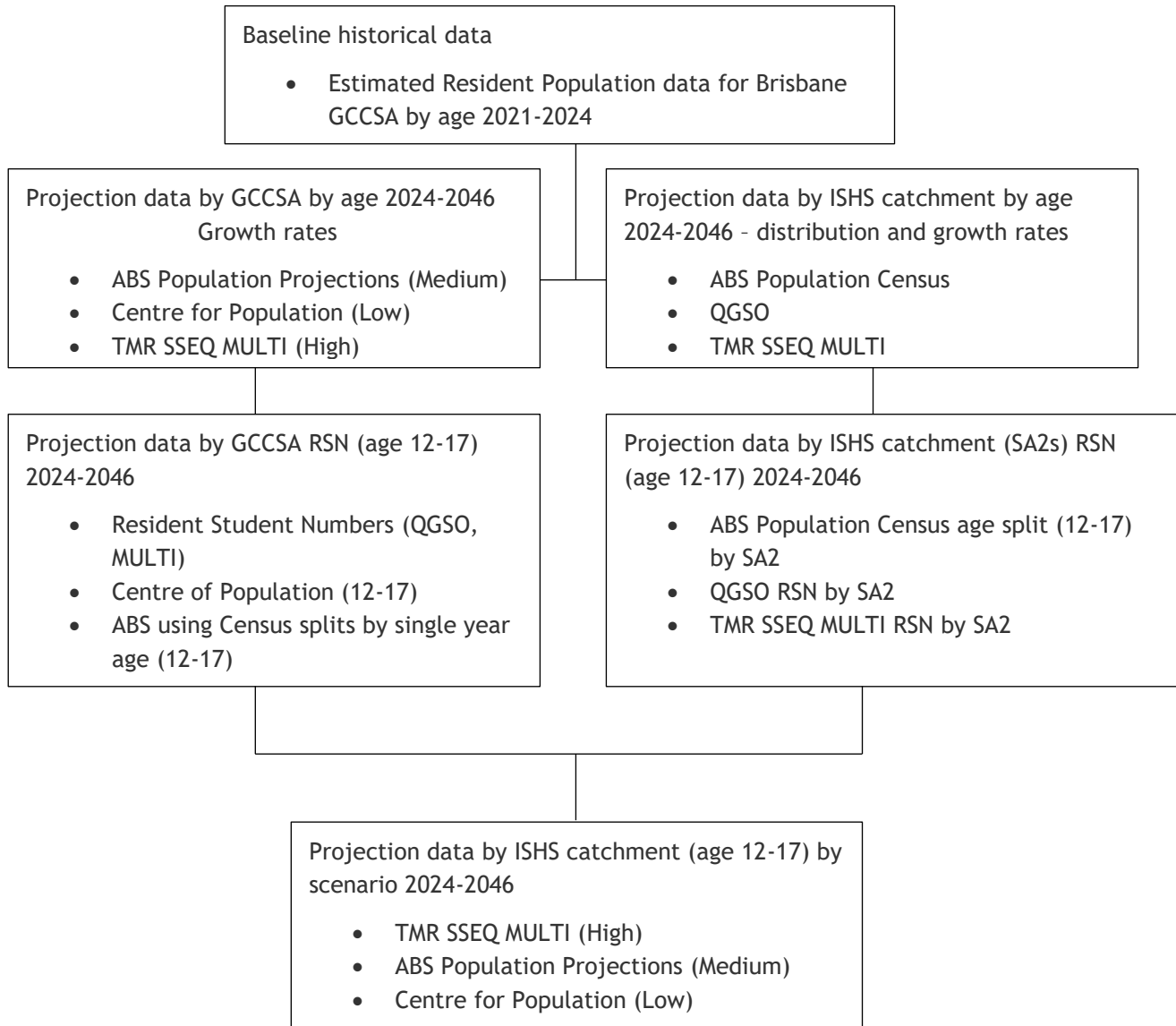
This methodology integrates top-down population trends with bottom-up localised adjustments to provide robust and reliable enrolment forecasts for ISHS. By using diverse data sources and scenario modelling, it captures the impact of demographic shifts, migration, and enrolment policies.

Table A1: RSN and enrolment forecasting general assumptions

Item	Assumption	Source
Base year	Estimated Resident Population	ERP at 2023 for capital cities and SA2s by age
RSN Scenario		
High	Baseline dataset	Population growth from SSEQ Shaping SEQ MULTI data (medium forecast series)
Medium		Population growth from ABS Population Projections for Brisbane GCCSA High Series
Low		Population Growth from Centre for Population Centre 2023-24 Capital City Projections
Proportion of ISHS RSN attending Government Secondary School		

Item	Assumption	Source
High	ABS Population Census split 44.9% at 2021	Growth in proportion at 1% p.a. to 57.6% at 2046
Medium		Growth in proportion at 0.5% p.a. to 50.9% at 2046
Low		Proportion at Govt Schools remains at 44.9%
ISHS Enrolment forecasts		
Option 1 (applied to each scenario)	% of RSN enrolled at ISHS	Remains constant at 2024 figure of 76.4%
	% OOC enrolments	Remains constant at 2024 figure of 63.9%
Option 2 (applied to each scenario)	% of RSN enrolled at ISHS	Increases to reflect historical changes (1%)
	% OOC enrolments	Decreases to reflect historical changes (-8%)

Figure A1: Process Map of RSN methodology



Appendix B Sensitivity and Error Analysis

Resident Student Number Sensitivity Analysis

The scenario-based enrolment projections for ISHS incorporate a range of assumptions, particularly around school preference rates and out-of-catchment (OOC) enrolments, which have been identified as the most sensitive parameters impacting Resident Student Numbers (RSN). A detailed sensitivity analysis was conducted to understand the extent to which variations in these key parameters influence the projections.

Table B1 below shows the RSN forecast under the three scenarios from the demographic analysis.

Table B1: Resident Student number (RSN) forecasts by attendance at Government School (12-17 years), ISHS catchment, 2021-2046

Scenario	2021 (actual)	2026	2031	2036	2041	2046
Low	2,090	2,215	2,234	2,236	2,344	2,473
Medium	2,090	2,323	2,433	2,514	2,712	2,941
High	2,090	2,338	2,598	2,802	3,141	3,486

Source: BDO, ABS; Centre of Population Projections

Key Sensitivity Variables

The demographic analysis showed that there were two key drivers of resident student numbers and of enrolments. These are:

- **School Preference Rates:** The proportion of in-catchment students choosing government schools.
- **OOC Enrolments:** Changes in OOC policies influencing total enrolments.

Resident Student Number Sensitivity Analysis

Sensitivity tests were performed to evaluate how variations in state school preference rates impact the long-term RSN projections under the High, Medium, and Low scenarios.

High RSN Scenario - Sensitivity to State School Preference Growth

Table B2: High RSN Scenario - Sensitivity to State School Preference Growth

State School Preference	2026	2031	2036	2041	2046
Proportion grows 1% p.a.	2,388	2,598	2,802	3,141	3,486
Proportion grows 0.5% p.a.	2,329	2,473	2,601	2,844	3,079

State School Preference	2026	2031	2036	2041	2046
Proportion stays the same	2,272	2,352	2,413	2,574	2,718

Table B3: Medium RSN Scenario - Sensitivity to State School Preference Growth

State School Preference	2026	2031	2036	2041	2046
Proportion grows 1% p.a.	2,381	2,557	2,708	2,995	3,329
Proportion grows 0.5% p.a.	2,323	2,433	2,514	2,712	2,941
Proportion stays the same	2,266	2,314	2,333	2,454	2,596

Table B4: Low RSN Scenario - Sensitivity to State School Preference Growth

State School Preference	2026	2031	2036	2041	2046
Proportion grows 1% p.a.	2,328	2,467	2,596	2,861	3,171
Proportion grows 0.5% p.a.	2,271	2,348	2,410	2,590	2,801
Proportion stays the same	2,215	2,234	2,236	2,344	2,473

5% and 3% Sensitivity Adjustments on Resident Student Numbers

Further sensitivity testing was conducted using +5% and +3% adjustments to the RSN forecasts to assess the potential range of variation in projected enrolments.

Demographic forecasting inherently involves some degree of uncertainty. Historical enrolment forecasting accuracy in Queensland schools and international education planning benchmarks suggest that:

- Short-term projections (5 years) generally maintain an error margin of $\pm 3\%$ to $\pm 5\%$.
- Long-term projections (20+ years) can have errors exceeding $\pm 10\%$, due to greater uncertainty in migration, fertility rates, and policy changes.

We have applied a $\pm 3\%$ to $\pm 5\%$ error margin to the RSN numbers under each of the three scenarios.

Table B5: RSN +5% Sensitivity

Scenario	2026	2031	2036	2041	2046
High	2,507	2,728	2,942	3,298	3,660

Scenario	2026	2031	2036	2041	2046
Medium	2,439	2,554	2,639	2,848	3,088
Low	2,325	2,345	2,348	2,462	2,596

Table B6: RSN +3% Sensitivity

Scenario	2026	2031	2036	2041	2046
High	2,459	2,676	2,886	3,235	3,591
Medium	2,393	2,506	2,589	2,793	3,029
Low	2,281	2,301	2,303	2,415	2,547

Magnitude of Difference in RSN Projections

The magnitude of difference between the base Low, Medium, and High RSN scenarios and the sensitivity-adjusted projections (+3% and +5%) highlights the variability in resident student numbers based on key assumptions.

- **Percentage Difference Between Base and Sensitivity Scenarios:**
 - The High RSN Scenario in 2046 increases from 3,486 students in the base model to 3,591 (+3%) and 3,660 (+5%), adding up to 174 additional RSNs at the upper bound.
 - In the Medium RSN Scenario, the increase from 2,941 to 3,029 (+3%) and 3,088 (+5%) suggests a potential 147 RSN variation.
 - The Low RSN Scenario sees the smallest variation, reflecting its more conservative assumptions.
- **Cumulative Growth Differences:**
 - The Low Scenario projects a total increase of 383 RSNs (+18.3%) from 2021 to 2046.
 - The Medium Scenario projects a growth of 851 RSNs (+40.7%).
 - The High Scenario shows the greatest increase, with 1,396 additional RSNs (+66.8%).
- **Interpretation of Variability:**
 - The difference between the High and Low scenarios is over 1,000 students by 2046, demonstrating how assumptions around school preference growth and migration impact long-term enrolments.
 - The sensitivity tests (+3% and +5%) show that enrolments remain highly responsive to minor shifts in state school preference rates.

- These findings highlight the importance of tracking real-time demographic and enrolment trends to refine future forecasts.

The sensitivity analysis confirms that state school preference rates are a key driver of RSN forecasts, with higher school preference leading to significantly increased enrolments across all scenarios. Additionally, overall RSN numbers remain sensitive to broader demographic shifts, as reflected in the +3% and +5% variations in the projections.

Effects on Short-term Enrolments

The short-term enrolment forecasts (2025-2029) were tested under different state school preference and OOC enrolment proportions across High, Medium, and Low RSN scenarios. Two enrolment options were applied:

- **Option 1:** Assumes constant in-catchment and OOC enrolment proportions.
- **Option 2:** Assumes increasing in-catchment enrolments and decreasing OOC proportions.

Key Observations from Sensitivity Testing

- **State School Preference Sensitivities**
 - A 5% increase in state school preference rates leads to higher enrolment projections, with up to 159 more students in 2029 under the High scenario.
 - A 3% increase shows more moderate growth, with Option 1 growing by ~96 students in 2029 under the High scenario.
 - If school preference remains unchanged, enrolments stabilise at lower levels, particularly in the Low RSN scenario.
- **OOC Enrolment Sensitivities**
 - A 5% increase in OOC enrolments results in an increase of ~62 students by 2029 in the High scenario.
 - A 3% increase in OOC enrolments has a smaller impact, adding ~37 students by 2029 in the High scenario.
 - Conversely, stricter OOC policies result in lower enrolments, with up to a 200-student difference between Option 1 and Option 2 in 2029 across all scenarios.
- **Overall Magnitude of Change**
 - The difference between High and Low RSN scenarios remains significant, reaching up to 350 students by 2029.
 - Increasing state school preference has a more pronounced impact on enrolments than changes in OOC proportions, particularly under Option 2.
 - The highest projected enrolment (3,334 in 2029) occurs under the High RSN scenario with a 5% school preference increase (Option 1), while the lowest projection (2,564) occurs under the Low RSN scenario with a stable school preference rate (Option 2).

Implications for Planning

- Higher state school preference rates could lead to capacity pressures at ISHS, especially if current infrastructure planning does not account for these shifts.
- OOC enrolment policies significantly influence overall enrolments, with stricter enforcement likely stabilising numbers in the medium-term.
- The interplay between in-catchment growth and policy adjustments will be critical in determining actual enrolment trends.

Conclusion

The sensitivity analysis confirms that school preference rates are the primary driver of enrolment fluctuations, reinforcing the robustness of the original Resident Student Number (RSN) forecasts. The projected trends remain consistent across different assumptions, with school preference exerting a greater influence on enrolments than out-of-catchment (OOC) enrolment policies.

While fluctuations in OOC enrolments contribute to short-term variations, the long-term enrolment trajectory is primarily shaped by shifts in school preference rates within the catchment, with OOC enrolments playing a secondary role.

The range of potential enrolment outcomes highlights the need for flexible planning, as variations in school preference and OOC enrolments can create short-term fluctuations despite the overall stability of long-term RSN forecasts. While enrolment projections generally align with historical trends, potential shifts in policy or demographic behaviour could influence the pace and magnitude of future enrolment growth.

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