

# International education & training snapshot:

## Queensland 2023

Publication date: September 2024

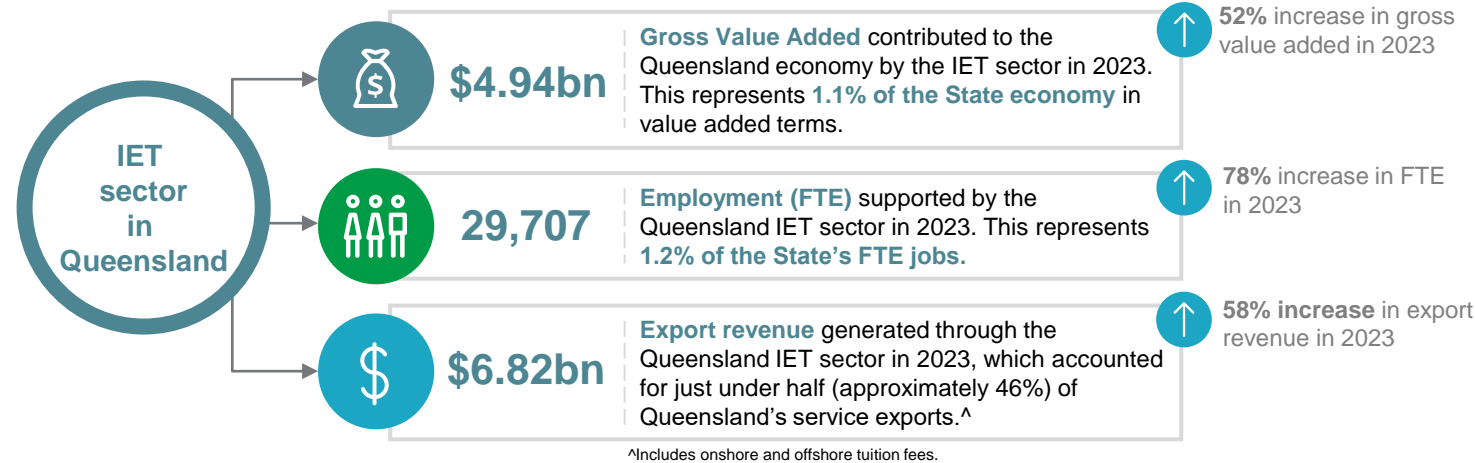
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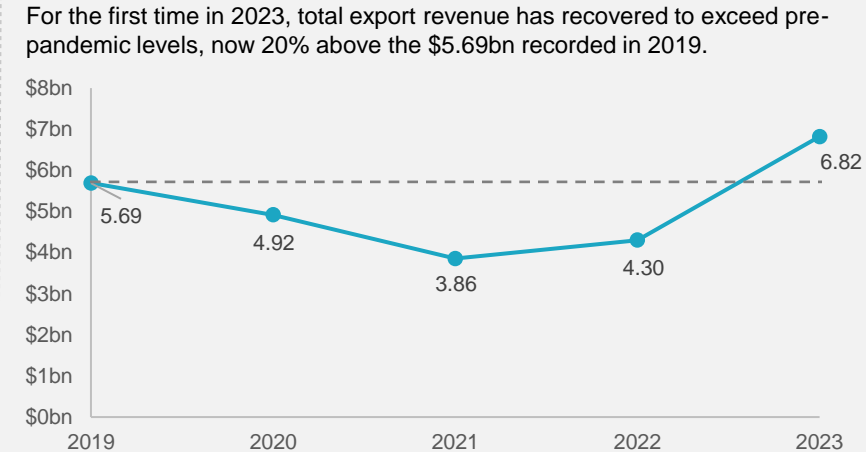


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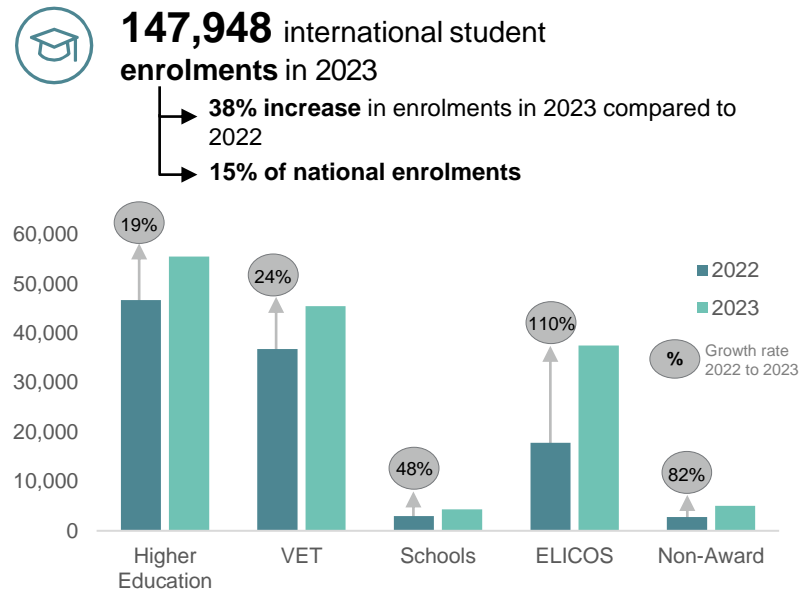
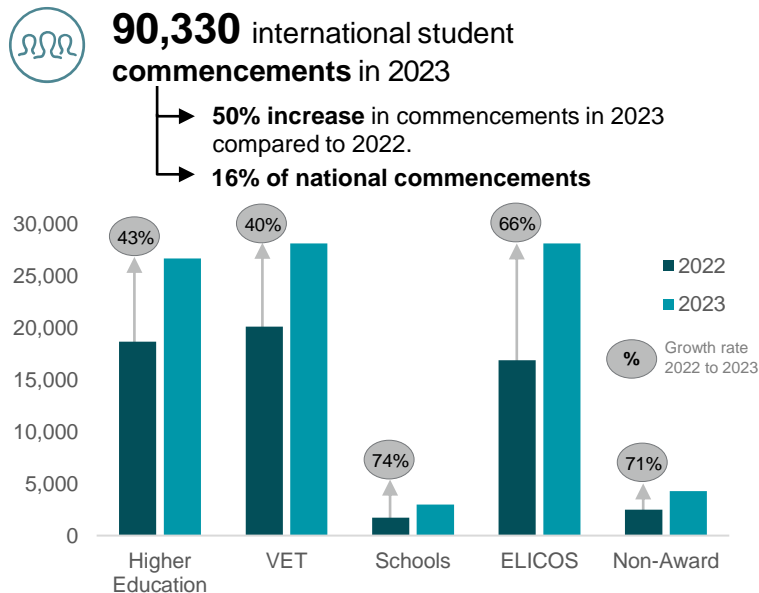
## Performance of the sector in 2023



## Export revenue from 2019 to 2023

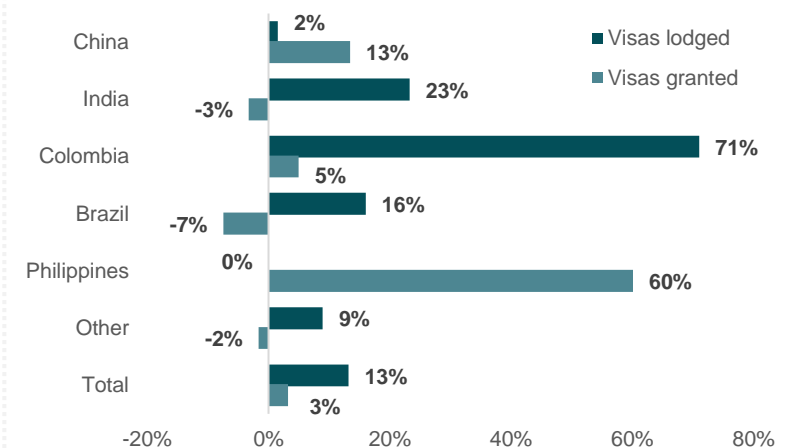


## International education and training in Queensland 2023 – at a glance



## Student visa activity

Growth in primary visas lodged and granted from 2022 to 2023 varied significantly across Queensland's top enrolment source markets.



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# IET policy landscape

## Queensland IET Strategy 2022 - 2027

The *Queensland International Education and Training (IET) Strategy 2022-2027* (the Strategy) outlines how Queensland will collaborate with local and offshore partners to promote services, develop workforce skills and support sector development in key international markets.<sup>1</sup> It builds on the sector collaboration fostered by the International Education and Training Strategy to Advance Queensland 2016-2026 and is reinforced by the 2021-2022 roadmap through the COVID-19 pandemic.<sup>2</sup> Further, the Strategy supports broader Queensland Government economic policy related to fostering future workforce skills and capability for emerging industries, such as the *Queensland Workforce Strategy and Queensland's Trade and Investment Strategy*.

The vision of the Strategy is underpinned by three pillars; promote, grow and foster. The Strategy aims to promote Queensland as a leading global destination of choice for quality education and meaningful experiences. This involves providing networks and opportunities to international students and generating global engagement through alumni and international business. To grow, the Strategy plans to increase its global diversification, provide support around career pathways and talent ecosystems, and attract talent for priority industries. Finally, the Strategy aims to foster international engagement through boosting the Queensland study experience, advocating for the sector and building the sector's capabilities. Each focus area is addressed in the action plan, contributing to the development and growth of Queensland's International Education and Training sector.

With post-pandemic recovery now well and truly realised, attention turns to the fast-approaching Brisbane 2032 Olympic and Paralympic Games, which will put the city in the global spotlight, driving the opportunity to attract international students to the state through enhanced international connections and worldwide promotion of Brisbane's offerings.

## National policy landscape

While Queensland's IET sector has seen strong recovery and intentional strategic development since the COVID-19 pandemic, the national policy landscape has tightened with greater regulations introduced in recent years.

Numerous policy changes came into effect during 2023, including:

- The reintroduction (by the Commonwealth Government) of the working hours cap for student visa holders at an increased level of 48 hours per fortnight (effective 1 July 2023).<sup>3</sup>
- The closure of the concurrent study function in the Provider Registration and International Student Management System (PRISMS) by the Commonwealth Government in August 2023 with the intention of minimising unscrupulous practices by providers.<sup>4</sup>

- A 17% increase in the student visa holder savings requirement to \$24,505 from 1 October.<sup>5</sup>
- The release of the national Migration Strategy in December, which included one action focused on the IET sector - *Action 3: Strengthening the integrity and quality of international education*.<sup>6</sup> The Department of Home Affairs indicated that this action aims to lift the standards for international students and education providers, while ensuring graduates help meet skills shortages and do not become 'permanently temporary'.

More policy and legislative changes have or are expected to occur in 2024, including:

- An increase in the English language requirement for student visas (effective March 2024).<sup>7</sup>
- The Genuine Temporary Entrant requirement replaced the Genuine Student requirement, and the Minister for Immigration was empowered with new abilities to consider further factors in issuing a provider suspension certificate under the ESOS Act.<sup>7</sup>
- A further increase in the savings requirements for obtaining a student visa to \$29,710 from 10 May.<sup>8</sup>
- An increase in the student visa fee from \$710 to \$1,600 from 1 July.<sup>9</sup>
- New legislation has been announced which will enable the Minister for Education and the Minister for Skills and Training to set an allocation for the maximum number of new international student enrolments education providers can offer. If universities want to enrol international students above that limit, they will be required to establish additional (new) purpose-built student accommodation to reduce pressure on the rental market. International student enrolment caps are due to be implemented in 2025.<sup>7</sup>

Cumulatively, these reforms seek to regulate the sector more carefully to ensure sustainable growth and positive experiences for all students.

<sup>1</sup> Study Queensland (2023), *Queensland International Education and Training Strategy 2022-2027*, <https://www.studyqueensland.qld.gov.au/queensland-iet-strategy>

<sup>2</sup> Trade and Investment Queensland (2016), *International Education and Training Strategy to Advance Queensland 2016-2026*, <https://cabinet.qld.gov.au/documents/2016/Oct/IETS/Attachments/Strategy.pdf>; Trade and Investment Queensland (2021), *Queensland's international education and training roadmap 2021-2022*, [https://www.tiq.qld.gov.au/getmedia/af08217e-c3de-49bd-a5f7-28a9309108ee/SQ-IET-Roadmap-2021-22\\_PDF.pdf](https://www.tiq.qld.gov.au/getmedia/af08217e-c3de-49bd-a5f7-28a9309108ee/SQ-IET-Roadmap-2021-22_PDF.pdf)

<sup>3</sup> Study Australia (2023), *Work hours limit for student visa holders to be re-introduced*, <https://www.studyaustralia.gov.au/en/tools-and-resources/news/work-hours-limit-for-student-visa-holders-to-be-re-introduced>

<sup>4</sup> Department of Education (2023), *Concurrent studies update*, <https://www.education.gov.au/international-education/announcements/concurrent-studies-update>

<sup>5</sup> Study Australia (2023), *Change to evidence of financial capacity for student visas*, <https://www.studyaustralia.gov.au/en/tools-and-resources/news/change-to-evidence-of-financial-capacity-for-student-visas>

<sup>6</sup> Department of Home Affairs (2023), *Migration Strategy*, <https://immi.homeaffairs.gov.au/what-we-do/migration-strategy>

<sup>7</sup> Ministers' Media Centre (2024), *Education Services for Overseas Students Amendment (Quality and Integrity) Bill 2024*, <https://ministers.education.gov.au/clare/education-services-overseas-students-amendment-quality-and-integrity-bill-2024>

<sup>8</sup> Study Australia (2024), *Student and Temporary Graduate visa changes: 2024*, <https://www.studyaustralia.gov.au/en/tools-and-resources/news/student-and-temporary-graduate-visa-changes-2024>

<sup>9</sup> Australian Government (2024), *Fee increase for international students part of July 1 migration reforms*, <https://minister.homeaffairs.gov.au/ClareONeil/Pages/fee-increase-for-international-students-July-1.aspx#:~:text=E2%80%8B%E2%80%8B%E2%80%8B%E2%80%8B%E2%80%8B,E2%80%8B,E2%80%8B.increase%20from%20%24710%20to%20%241%2C600.>

# International student enrolments

## International student enrolments

**147,948**  
enrolments in 2023

In 2023, international student enrolments in Queensland rebounded significantly to **147,948, 2% higher than pre-pandemic (i.e. 2019) levels. Higher Education and VET remained the two largest IET sub-sectors**, with 55,507 and 45,501 enrolments respectively (Table 1). However, rapid growth in English Language Intensive Courses for Overseas Students (ELICOS) enrolments has narrowed the gap, with this sector now much closer in size to Higher Education and VET, than to the comparatively smaller Schools and Non-award sectors.

**38%**  
increase in enrolments 2022 to 2023

Queensland IET enrolments grew by 38% between 2022 and 2023 (Chart 1). Enrolment growth was positive in every sub-sector, but to varying extents. The Higher Education and VET sectors experienced more moderate growth of 19% and 24% respectively. By contrast, School enrolments increased by 48% and the ELICOS (110%) and Non-award (82%) sectors experienced even more significant growth. These figures represent a second consecutive year of sustained growth in ELICOS and Non-award enrolments, having moderated slightly from growth rates of 138% and 135% respectively between 2021 and 2022. Given the role ELICOS and Non-award play as pipelines into Higher Education and VET courses, strong enrolment growth in these sectors has the potential to spur IET growth in coming years.

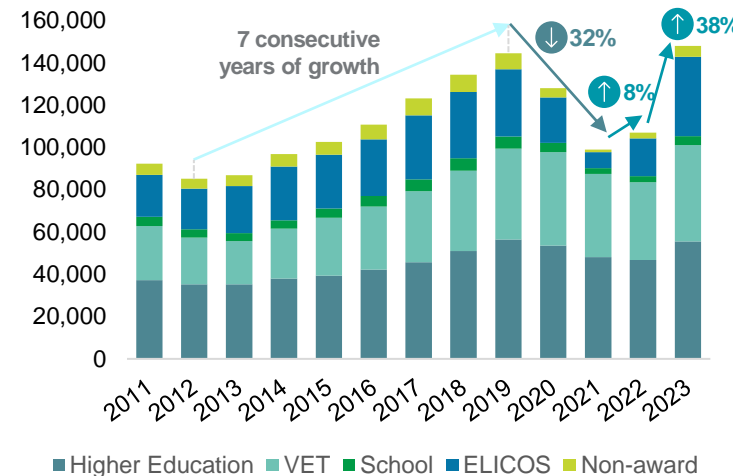
Note: (1) The totals presented in each table and chart may differ slightly from the sum of each of the component parts due to rounding (2) The total number of enrolments by subsector and source market may differ due to differences in the underlying data provided by the Department of Education.

Table 1: Enrolments by sub-sector, 2022-2023

	2022 enrolments	2023 enrolments	YOY growth
Higher Education	46,684	55,507	19%
VET	36,785	45,501	24%
Schools	2,938	4,355	48%
ELICOS	17,830	37,516	110%
Non-award	2,785	5,069	82%
<b>Total</b>	<b>107,022</b>	<b>147,948</b>	<b>38%</b>

Source: Australian Government Department of Education, international student enrolment data. Enrolments in December of each year. Data as of April 2024 release.

Chart 1: IET enrolments by sub-sector, 2011-2023



Source: Australian Government Department of Education, international student enrolment data. Enrolments in December of each year. Data as of April 2024 release.

## Enrolments by region

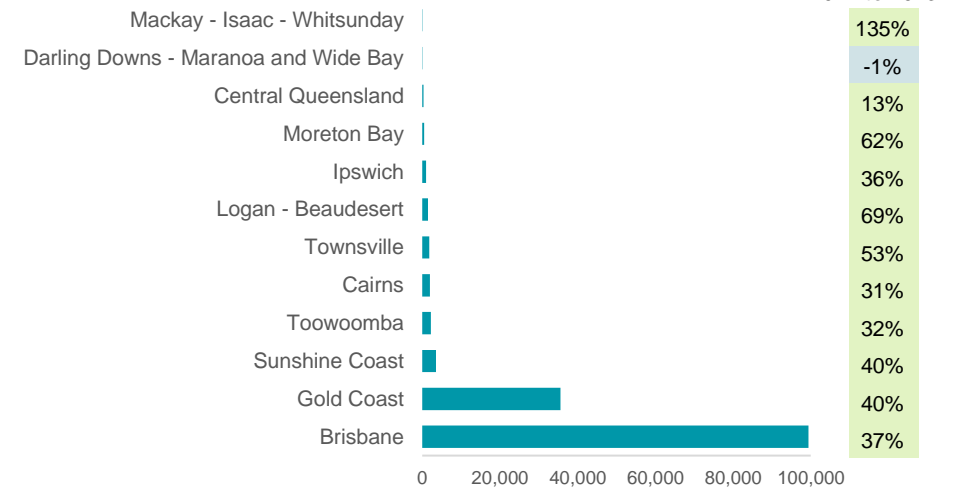
Due to data limitations, regional enrolments for the full calendar year (i.e. Dec YTD) have been extrapolated using Oct YTD data. As such, regional enrolments for 2023 (and subsequent growth rates) may vary to other data sources due to data revisions in subsequent releases and restricted reporting in regions with less than five enrolments.

Brisbane and the Gold Coast remain the two largest regions, accounting for approximately 91% of IET enrolments in 2023 (Chart 2).

Estimated enrolment growth between 2022 and 2023 was positive across all Queensland regions except for Darling Downs – Maranoa and Wide Bay which saw a modest 1% decline.

At 135%, the largest estimated growth in a single region occurred in the Mackay – Isaac – Whitsunday region, however, this region remained the smallest by overall number of enrolments. Enrolment growth was distributed fairly evenly across the other regions.

Chart 2: Enrolments across Queensland regions, 2023



Source: Australian Government Department of Education, international student enrolment data by ABS SA4. Enrolments in December of each year. Data as of April 2024 release. Note: 2023 enrolments for the full year (i.e. Dec YTD) have been extrapolated from Oct YTD data.

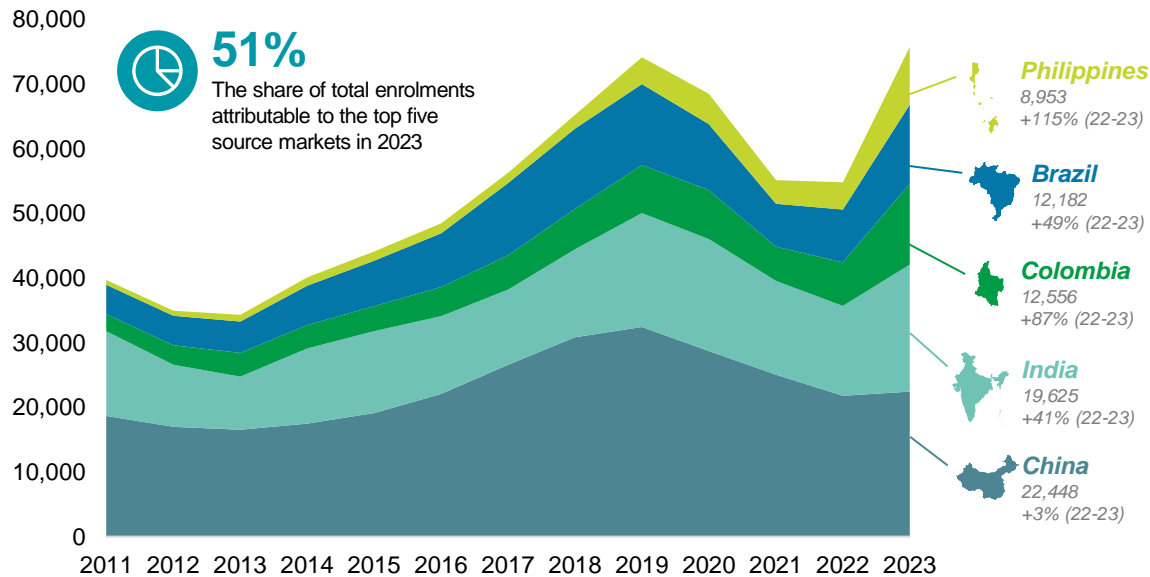
# International student enrolments

## Enrolments by source market

China and India continued to be the largest source markets for international student enrolments in Queensland reestablishing positive enrolment growth in 2023 (Table 2). Growth in India (41%) was much faster than in China (3%), with the former closing the gap in overall enrolments.

Colombia, Brazil and the Philippines rounded out Queensland's top five enrolment source markets – with Colombia narrowly overtaking Brazil for the first time, and the Philippines breaking into the top five, up from sixth in 2022. Despite significant growth in all three of these source markets, the concentration of the top five enrolment source markets fell from 52% in 2022 to 50% in 2023. This decrease in concentration was largely driven by a five-percentage point drop in the enrolment market share of China, compounding the increasing diversification seen in previous years.

**Chart 3: Queensland enrolments in top five source markets, 2011-2023**



Source: Australian Government Department of Education, international student enrolment data. Enrolments in December of each year. Data as of April 2024 release.

**Table 2: Enrolments in Queensland's top ten source markets, 2023**

QLD rank	National rank	Source market	2023 QLD enrolments	2023 QLD market share	Growth in enrolments from 2022
1	1	China	22,448	15%	3%
2	2	India	19,625	13%	41%
3	4	Colombia	12,556	8%	87%
4	8	Brazil	12,182	8%	49%
5	5	Philippines	8,953	6%	115%
6	7	Thailand	5,289	4%	67%
7	3	Nepal	5,082	3%	-2%
8	17	Japan	4,859	3%	41%
9	13	South Korea	3,952	3%	3%
10	18	Taiwan	3,771	3%	12%
		Other*	49,231	33%	48%
		<b>Total</b>	<b>147,948</b>	<b>100%</b>	

\* Enrolments in 153 countries are captured under 'Other'

Source: Australian Government Department of Education, international student enrolment data. Enrolments in December of each year. Data as of April 2024 release.

Queensland's top ten enrolment source markets remained largely unchanged in 2023 with the same countries represented, despite some changes in rank from 2022. Most notably, Nepal has fallen from fifth to seventh after a 2% reduction in enrolments and Thailand has risen from tenth to sixth after a second consecutive year of strong growth (67% from 2022 to 2023).

Thailand, Nepal, Japan, South Korea, and Taiwan rounded out Queensland's top ten source markets with varied enrolment growth as highlighted above. Japan also grew noticeably by 41%, while growth in enrolments from South Korea and Taiwan was moderate.

Note: (1) The totals presented in each table and chart may differ slightly from the sum of each of the component parts due to rounding (2) The total number of enrolments by subsector and source market may differ due to differences in the underlying data provided by the Department of Education.

# International student enrolments

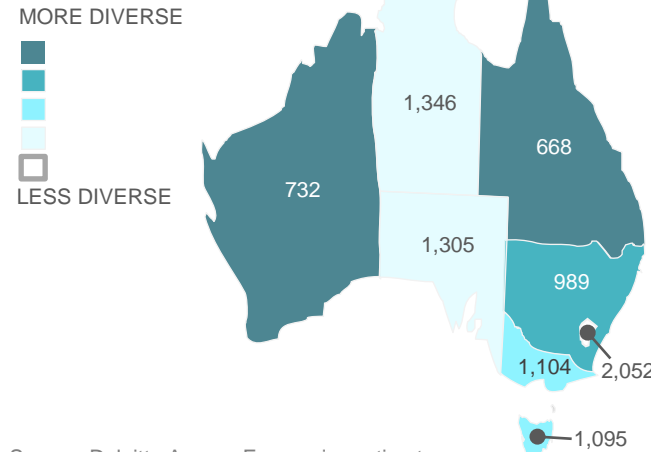
## Source market concentration

Deloitte Access Economics measures the degree of enrolment source market concentration within a region by the Herfindahl-Hirschman Index. This is defined as the sum of square of the source market shares of enrolments. The index can range from 0 to 10,000, with a low index suggesting that enrolments in the IET sector are spread over a diverse range of source markets. This can make the sector more resilient to shocks in the global market.

Queensland is now the most diverse IET sector in Australia, with a diversity index score of 668 in 2023 (Figure 1), 128 points (16%) lower than in 2022. Market concentration decreased in all jurisdictions in 2023, breaking the trend of increased concentration in recent years.

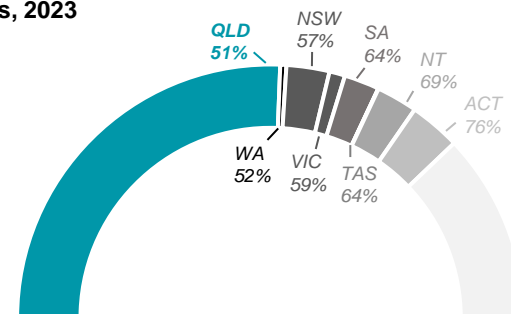
As previously highlighted, this diversification in Queensland was driven by a fall in the concentration of enrolments in the top five source markets, which have decreased to account for 51% of enrolments in 2023, down from 52% in 2022. Queensland's top five concentration is now the lowest of all states and territories (Figure 2). It is also comfortably below the national concentration, where the top five source markets accounted for 55% of enrolments Australia-wide.

**Figure 1: Source market concentration by state and territory, 2023**



Source: Deloitte Access Economics estimates

**Figure 2: Proportion of IET enrolments in top 5 source markets, 2023**



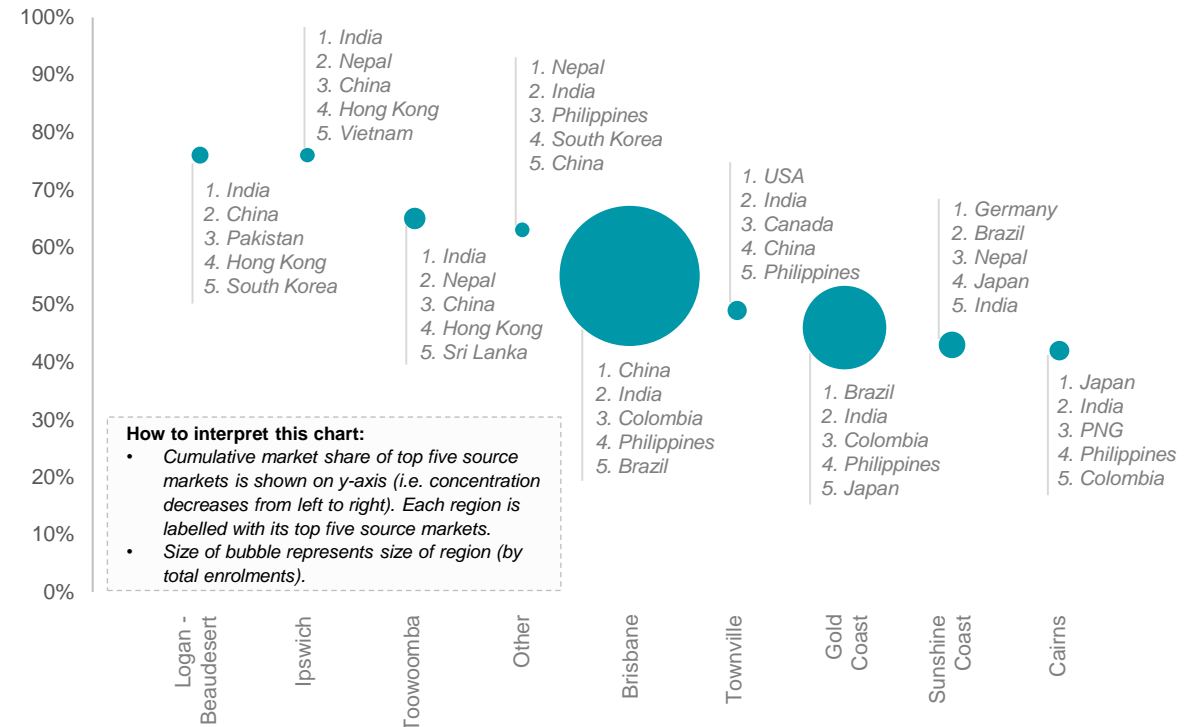
Source: Australian Government Department of Education. Data as of April 2024 release.

## Regional concentration

Geographically, IET enrolments are concentrated in Brisbane and the Gold Coast, which accounted for 91% of Queensland IET enrolments in 2023 (remaining unchanged since 2021).

Market concentration varied significantly across Queensland's regions. In 2023, Logan - Beaudesert and Ipswich were the most concentrated regions both with 76% of IET enrolments in the top five source markets (Chart 4). The most diverse markets were Townsville, the Gold Coast, the Sunshine Coast, and Cairns, all with less than 50% of enrolments in the top five source markets. This analysis relies on October year-to-date data.

**Chart 4: Cumulative enrolment market share of top five source markets, by region, 2023**



**How to interpret this chart:**

- Cumulative market share of top five source markets is shown on y-axis (i.e. concentration decreases from left to right). Each region is labelled with its top five source markets.
- Size of bubble represents size of region (by total enrolments).

Source: Australian Government Department of Education, international student enrolment data by ABS SA4. Enrolments from October 2023 YTD in April 2024 data release.

Note: Other Queensland Regions includes Central Queensland, Darling Downs - Maranoa & Widebay, Mackay - Isaac - Whitsunday, and Moreton Bay.

# International student commencements

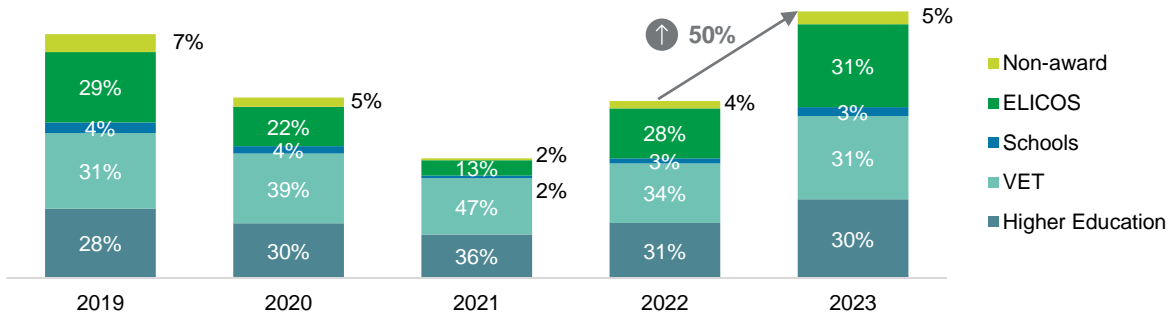
## International student commencements

**90,330**  
 commencements in 2023

In 2023, Queensland's IET commencements totaled 90,330 – representing 61% of total enrolments in 2023. This represented a significant increase of 51% from 2022 commencements as the sector continued to rebound post-COVID with a second consecutive year of positive growth. Further, positive commencement growth was observed across all IET sub-sectors in 2023. The School and Non-award sectors observed the largest growth of 74% and 71% respectively, followed by ELICOS (66% between 2022 and 2023), Higher Education (43%) and VET (40%). In 2023, Queensland's commencements rose above pre-pandemic levels for the first time, where commencements were 9% greater than 2019 levels.

In 2023, the distribution of commencements across sub-sectors were more aligned with pre-covid (i.e. 2019) trends (Chart 5). The ELICOS and Non-award sectors which had suffered the largest declines in commencements during the COVID-19 pandemic continued to rise to 31% and 5% of total commencements respectively. With the reestablishment of these sectors, those that had proved more resilient and adopted greater market share during the pandemic have given back some of those gains, with Higher Education lowering to 31% of all commencements and VET falling similarly to 30% in 2023. Meanwhile, the proportion of commencements in School settings have remained steady at 3%. These trends confirm that compositional changes during the pandemic years reflected short-term disruptions rather than long term shifts in student preferences.

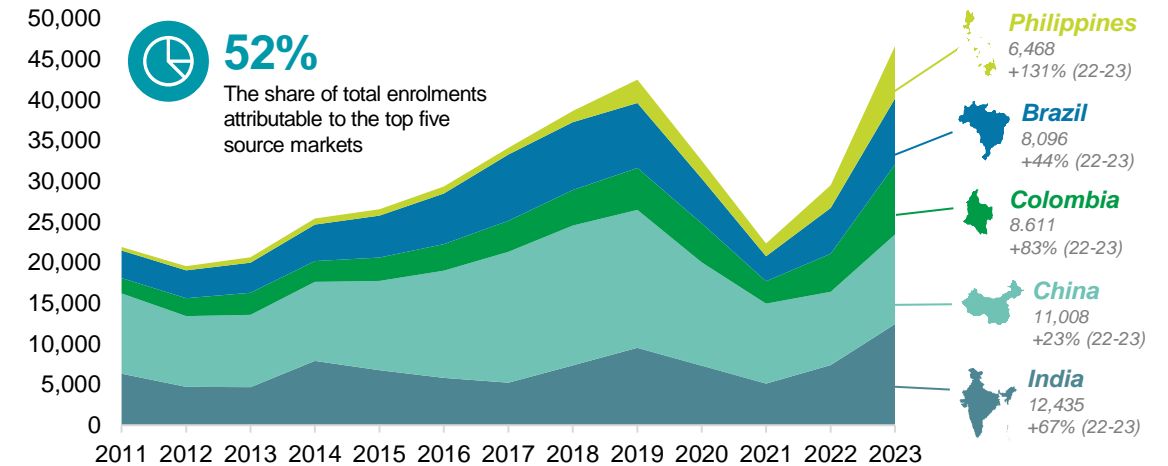
**Chart 5: Commencements by sub-sector, 2019-2023**



Source: Australian Government Department of Education, international student commencement data. Commencements in December of each year. Data as of April 2024 release.

## Commencements by source market

**Chart 6: Queensland commencements in top five source markets, 2011-2023**



Source: Australian Government Department of Education, international student commencement data. Commencements in December of each year. Data as of April 2024 release.

In 2023, Queensland's top five commencement source markets were India, China, Colombia, Brazil, and the Philippines, which together accounted for 52% of the state's IET commencements (Chart 6).

India overtook China for the first time to become Queensland's largest commencement source market in 2023, with a much higher growth rate of 67%, compared to China's 23% from 2022 to 2023. This reflects the national trend where Chinese commencements declined between 2020 and 2022 and remain more muted in their recovery in light of broader macroeconomic conditions and geopolitical factors.

The remaining top three source markets also experienced strong continued recovery including Colombia (83% growth between 2022 and 2023), Brazil (44%), and the Philippines (131%) which saw particularly rapid growth. Notably, Colombia also overtook Brazil for the first time making it Queensland's third largest commencement source market.

Future commencement growth in key source markets such as India, Colombia, and the Philippines may be impacted by changes in migration settings (e.g. visa refusal trends).<sup>1</sup>

<sup>1</sup> Department of Home Affairs (2023), *Student visa and Temporary Graduate visa program report*, <https://www.homeaffairs.gov.au/research-and-stats/files/student-temporary-grad-program-report-dec-2023.pdf>



# International student commencements

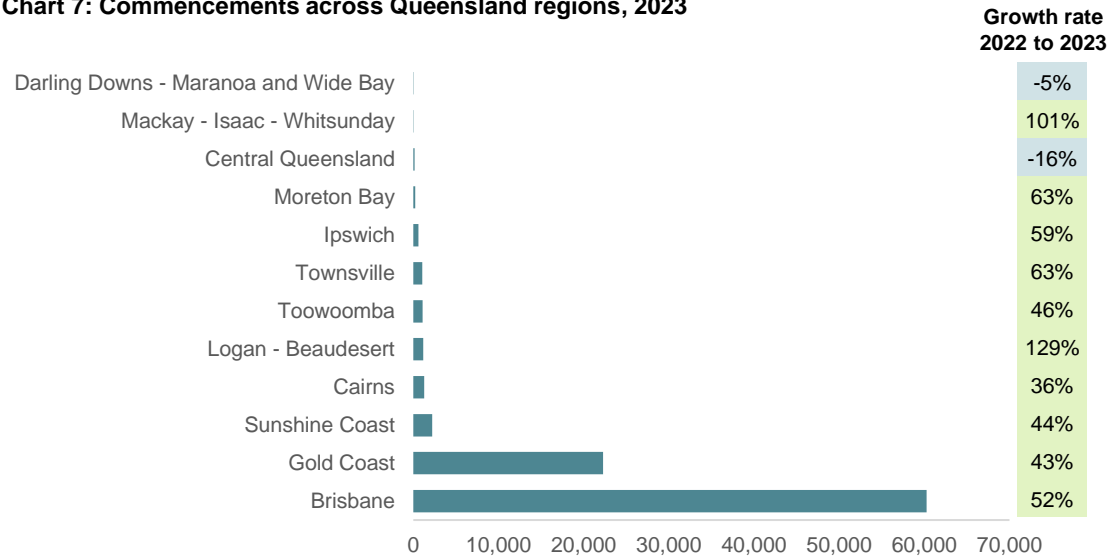
## Commencements by region

Due to data limitations, regional commencements for the full calendar year (i.e. Dec YTD) have been extrapolated using Oct YTD data. As such, regional commencements for 2023 (and subsequent growth rates) may vary to other data sources due to data revisions in subsequent releases and restricted reporting in regions with less than five commencements.

The estimated commencement growth was driven by significant year-on-year growth in ten out of twelve of Queensland's regions (Chart 7). Particularly large commencement growth was observed in Mackay – Isaac – Whitsunday, and Logan – Beaudesert where commencements were estimated to be more than doubled that of 2022 (i.e. much faster growth in these regions than from 2021 to 2022).

Other regions including Moreton Bay, Ipswich, Townsville, and Brisbane also experienced positive commencement growth greater than 50%. Darling Downs – Maranoa and Wide Bay (-5%), and Central Queensland (-16%) were the only two regions estimated to have negative growth – the former by a smaller margin but for a second consecutive year.

**Chart 7: Commencements across Queensland regions, 2023**

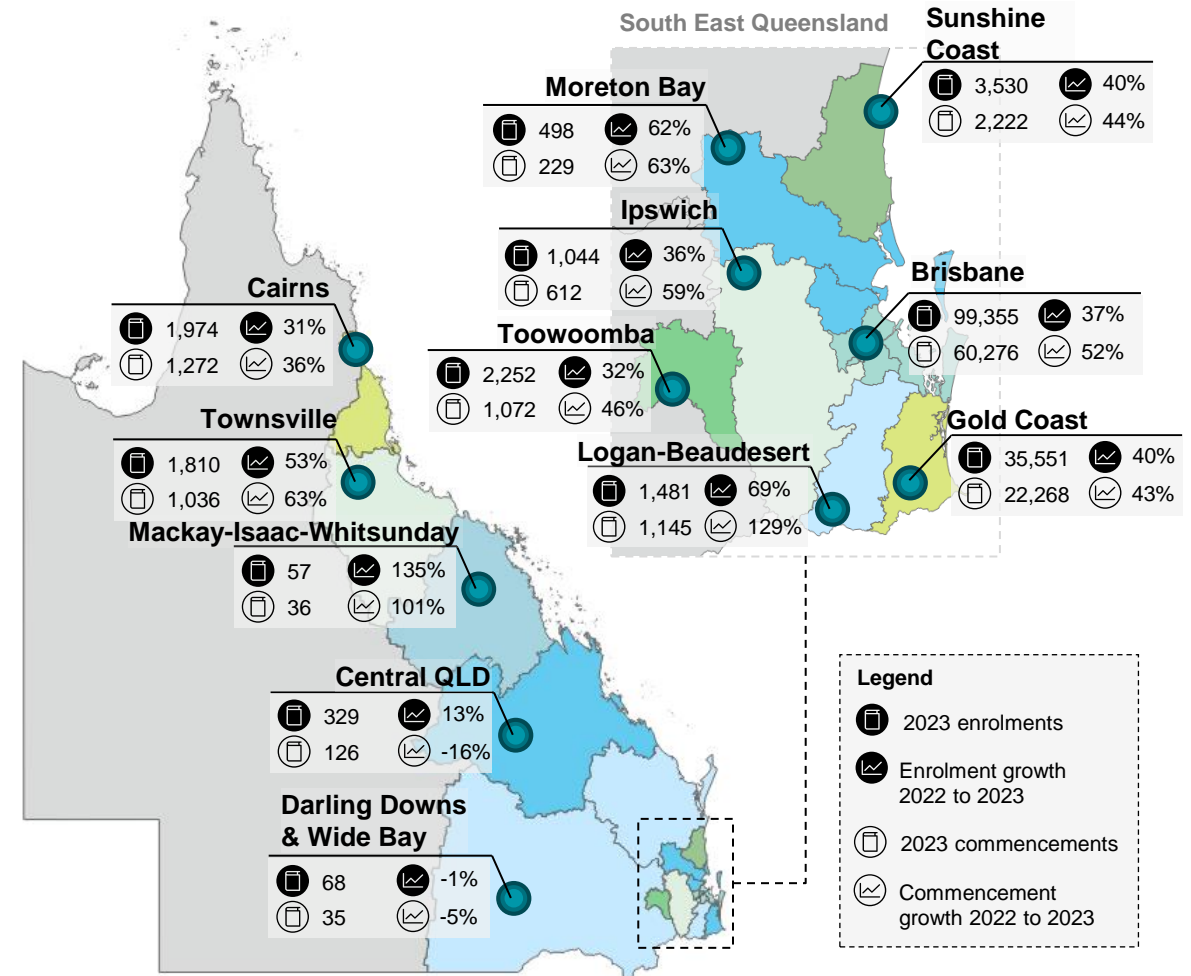


Source: Australian Government Department of Education, international student commencement data by ABS SA4. Commencements in December of each year. Data as of April 2024 release.

Note: 2023 commencements for the full year (Dec YTD) have been extrapolated from Oct YTD data.

## Regional enrolments and commencements summary

**Figure 3: IET total enrolments and commencements by region, 2023**



Note: Due to data limitations, Deloitte Access Economics extrapolated regional enrolments and commencements for the full year (i.e. Dec YTD) using Oct YTD data. It has been assumed that the proportion of enrolments and commencements in each SA4 in the first 10 months of the year by sector remained constant throughout October and December.

# Visa activity

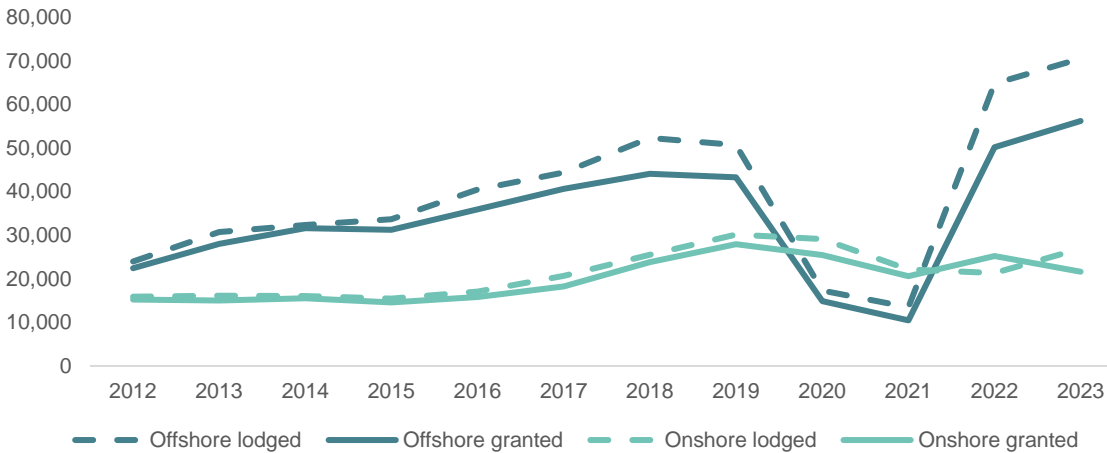
## Visas lodged and granted

Student visa applications are an enabler of international student enrolments and commencements. Historically, offshore visa applications have been a more significant enabler compared to onshore visa applications (as most students apply for their visa before coming to Australia).

The total number of lodged and granted visas continued to grow in 2023, but at a slower rate than the sharp rebound from 2021-2022, realigning with the stable pathway of longer-term historical growth (Chart 8). Given visas are largely a leading indicator of enrolments and commencements, these trends inform the rapid enrolment and commencement growth now observed in 2023, and suggest that enrolment and commencement growth may slow in 2024.

It is also important to note that the gap between lodged and granted visas has grown in recent years. Total student visas lodged in Queensland increased by 13% from 2022 to 97,417, but total visas granted only rose 3% to 77,777. The proportion of lodged visas being granted across the state peaked at 97% in 2014 and then remained relatively constant at 87-88% for five years from 2018-2022. However, in 2023 this ratio has fallen to the lowest ever, just below 80%. Consistent with the tightening national policy landscape described on pg.4, these trends are also reflected at the national level with 25% growth in visas lodged but only 7% growth in visas granted from 2022-23. The Australia-wide grant rate also fell from 91% to 78% over this twelve-month period.

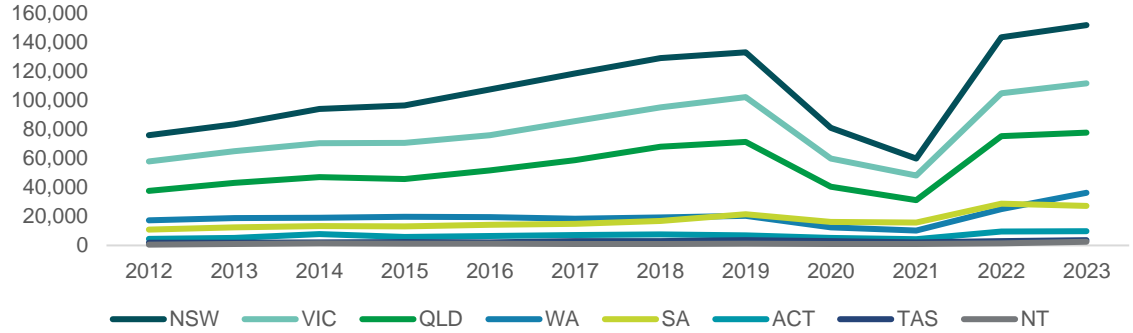
**Chart 8: Queensland student visas lodged and granted by location, 2012-2023**



Source: Department of Home Affairs: Student Visa Program. Years are financial years. Primary applicant visas.

Queensland is the third largest Australian destination for international student visas. It has followed a similar recovery trend to the other major east coast states but with slower growth in visas granted in 2023 (Chart 9). Meanwhile, Western Australia has shown the fastest growth.

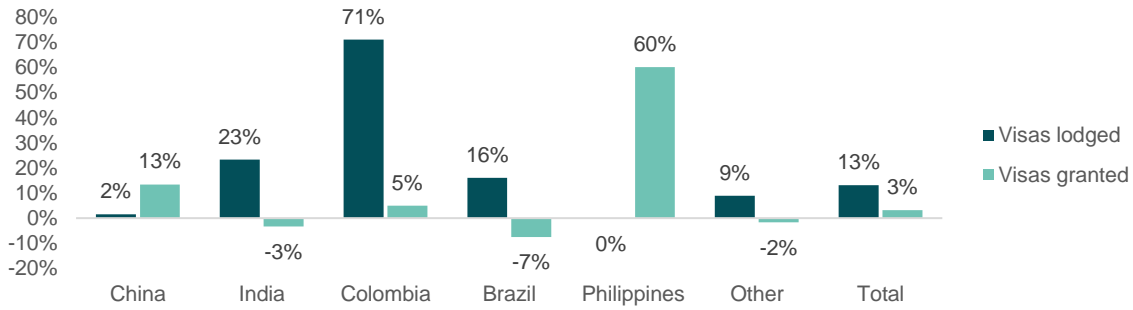
**Chart 9: Visas granted across Australian jurisdictions, 2012-2023**



Source: Department of Home Affairs: Student Visa Program. Years are financial years. Primary applicant visas.

Growth in visas lodged and granted in from 2022 to 2023 varies notably across Queensland's top five enrolment source markets (Chart 10), revealing differing overseas demand and changes in migration settings (e.g. visa refusal trends).<sup>1</sup> As previously noted, growth in commencements from 2022-23 is consistently much higher than is reflected in visas granted, suggesting a large return of students on visas granted in previous years.

**Chart 10: Growth rates in Queensland student visas lodged and visas granted from 2022-23 in the top five enrolment source markets**



Source: Department of Home Affairs: Student Visa Program. Years are financial years. Primary applicant visas.

<sup>1</sup> Department of Home Affairs (2023), *Student visa and Temporary Graduate visa program report*, <https://www.homeaffairs.gov.au/research-and-stats/files/student-temporary-grad-program-report-dec-2023.pdf>

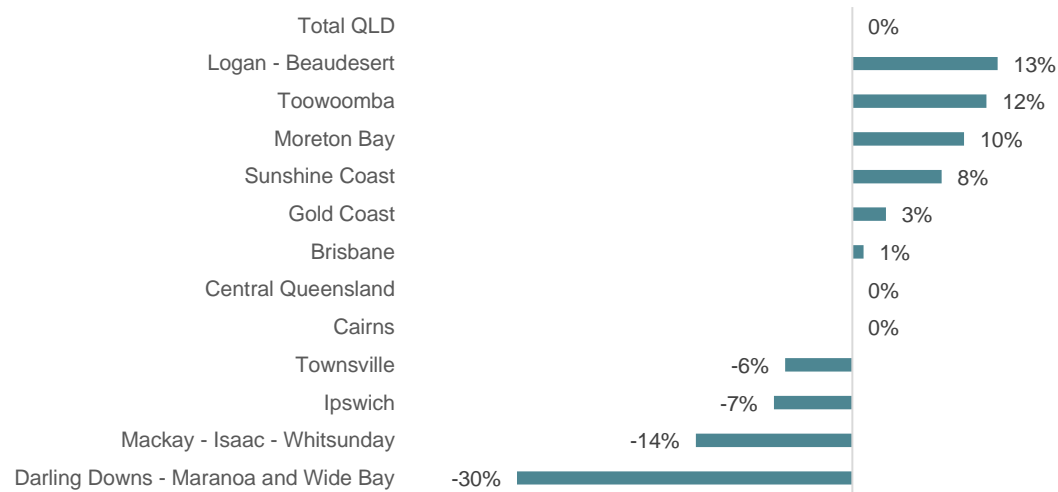
# CRICOS providers and courses

## CRICOS providers<sup>^</sup>

In 2023, there were **363 unique CRICOS education providers operating in Queensland\*** - the same total number as in 2022. However, the number of providers operating in each region shifted noticeably from year to year (Chart 11).

It is estimated that these providers offered 7,350 courses statewide, down 2% on 2022 levels. This represents some consolidation in the number of different courses offered. The change was modest in the largest regions of Brisbane (+1%) and the Gold Coast (-0.4%), but there were more notable reductions in the number of courses offered in regional centres such as the Darling Downs - Maranoa & Widebay (-31%), Central Queensland (-14%), Mackay – Isaac – Whitsunday (-13%), and Townsville (-13%).

**Chart 11: Growth in unique providers operating in Queensland regions between 2022 and 2023**

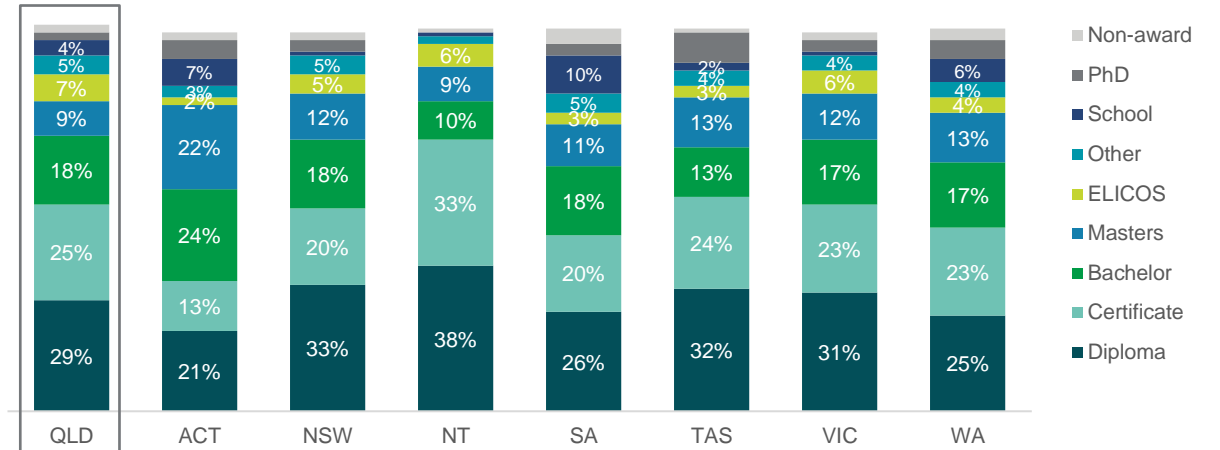


Source: Australian Government Department of Education. Deloitte Access Economic estimates. Data current as of 1 December 2023.

<sup>^</sup>Deloitte Access Economics uses the Commonwealth Register of Institutions and Courses for Overseas Students (CRICOS) data to estimate the number of providers and courses. These are estimates based on assumptions. Providers can operate in multiple regions within Queensland and/or in multiple jurisdictions across Australia. As such, the estimated number of providers and courses presented in this analysis may not equal provider records. \*Some providers operate in multiple regions, hence the sum of unique providers in each region is greater than the sum of unique providers in Queensland.

CRICOS courses offered in Queensland are relatively diverse by qualification type, with Diplomas (29% of total), Certificates (25%), and Bachelors (18%) all forming major categories (Chart 12).

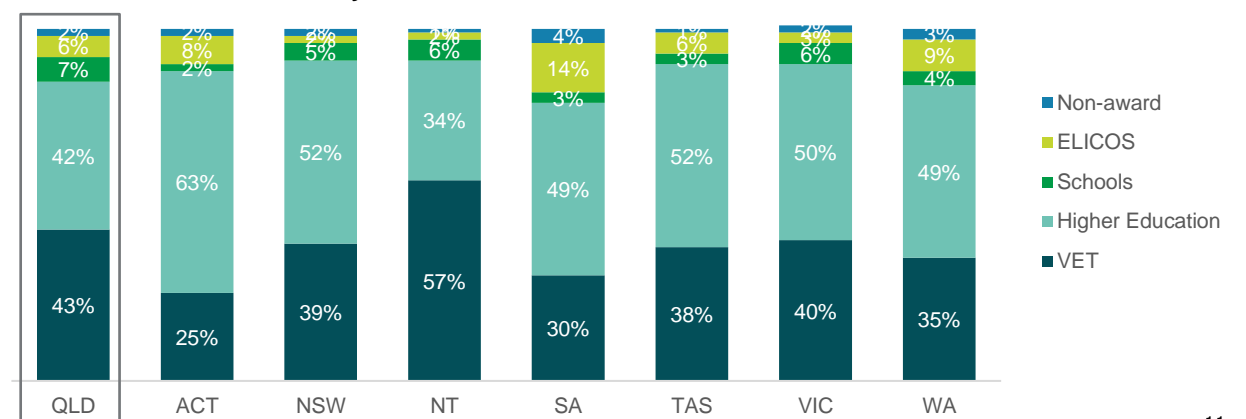
**Chart 12: CRICOS courses by qualification type, 2023**



Source: Australian Government Department of Education. Data current as of 1 December 2023.

In 2023, VET providers accounted for **43% of all courses** in Queensland, overtaking Higher Education which remained at 42% (Chart 13). Queensland had the highest proportion of School courses and the second lowest proportion of Higher Education courses after the Northern Territory.

**Chart 13: CRICOS courses by sector, 2023**



Source: Australian Government Department of Education. Data current as of 1 December 2023.

# Export revenue

## Export revenue

**\$6.82bn**

export revenue from onshore and offshore students and their visiting friends and relatives

Queensland's IET sector export revenue totalled **\$6.82 billion in 2023\***, which accounted for almost half (approximately 46%) of Queensland's services exports. The Higher Education sector made the largest contribution to export revenue (\$4.16bn; 61% of export revenue), followed by VET (\$1.59bn; 23%), ELICOS (\$0.63bn; 9%), Schools (\$0.30bn; 4%) and Non-award (\$0.13bn; 2%) (Chart 14).

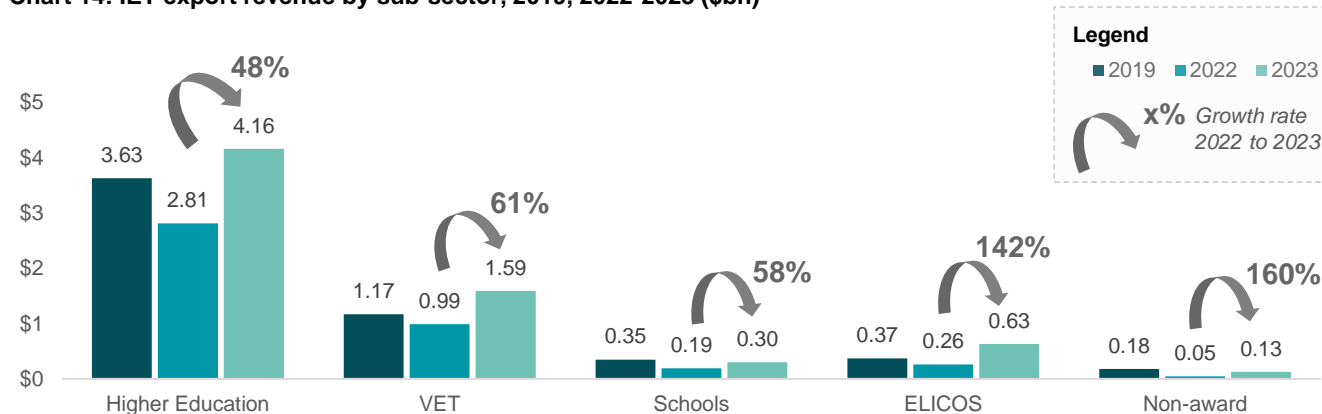
\* Export revenue estimates capture the export revenue of international students on student visas and their visiting friends and relatives.

**58%**

increase in export revenue from 2022 to 2023

Queensland's IET export revenue increased by 58% between 2022 and 2023, rising 22% above pre-pandemic levels (\$5.60 billion in 2019). This was driven by major increases in all IET sub-sectors (Higher Education, VET, and ELICOS all well above 2019), with the smaller ELICOS and Non-award sectors observing the largest uptick (Chart 14). The significant growth in export revenue was also reflected at the national level and is driven by growth in enrolments, but also by a large increase in goods and services expenditure. This rise in goods and services spending is due primarily to a large number of students returning onshore and increasing per-student expenditure.

Chart 14: IET export revenue by sub-sector, 2019, 2022-2023 (\$bn)



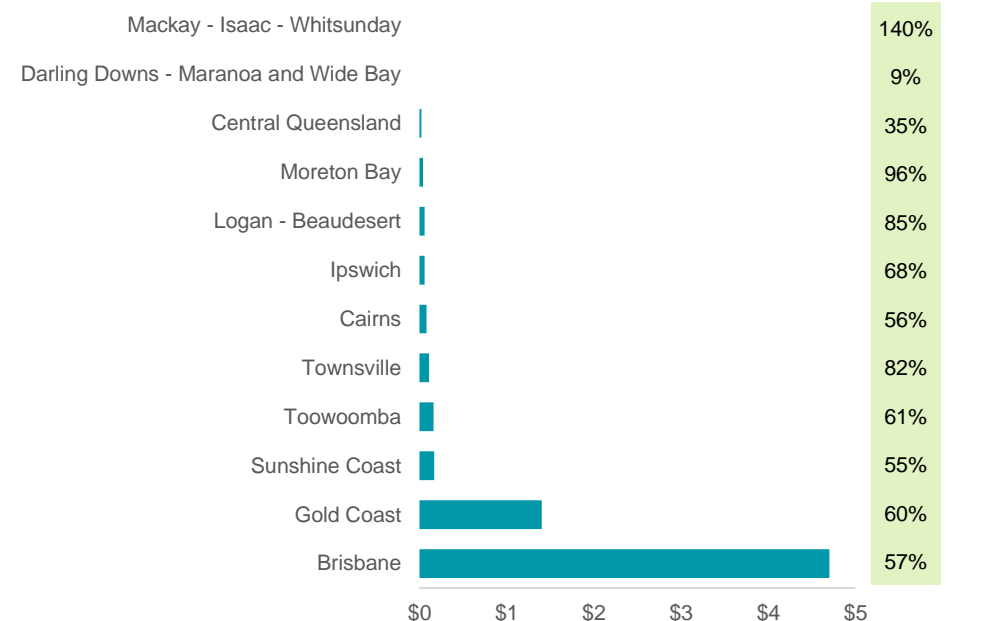
Source: Australian Bureau of Statistics, Australian Government Department of Education, Tourism Research Australia, Deloitte Access Economics estimates.

## Regional breakdown

**Brisbane and the Gold Coast** remained the two largest segments of the Queensland IET sector, accounting for **89% of IET export revenue** in 2023 (Chart 15).

All twelve regions experienced positive growth in export revenue in 2023, including 57% in Brisbane and 60% in the Gold Coast where the most revenue was generated. The Sunshine Coast (55% growth) maintained third position over Toowoomba (61%) which narrowed the gap from 2022. Townsville (82%) also grew quickly to remain Queensland's fifth largest IET export region. Meanwhile, the greatest outliers were in the smallest regions: Mackay – Isaac – Whitsunday grew significantly by 140%, while the Darling Downs – Maranoa and Wide Bay only rose 9%.

Chart 15: Export revenue in regions of QLD (\$bn), 2023



Source: Australian Bureau of Statistics, Australian Government Department of Education, Tourism Research Australia, Deloitte Access Economics estimates.

Note: The totals (and subsequent growth rates) presented in each chart and table may differ slightly from the sum of each of the component parts due to rounding.

# Export revenue

## Onshore student export revenue

**\$6.71bn**  
in onshore export revenue in 2023

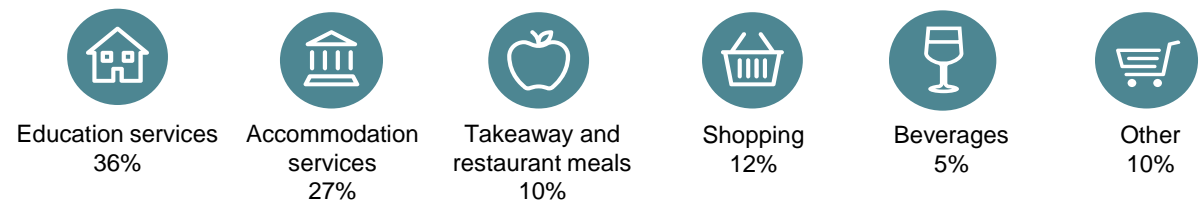
Onshore student\* export revenue (i.e. expenditure on goods and services and onshore tuition fees) totalled **\$6.71 billion in 2023** - reflecting a **77% increase on 2022 levels** (Table 3). Beyond total enrolment growth (38%) and a major increase in the proportion of onshore students (evident in the 51% rise in onshore tuition fee expenditure compared to 2022 levels), goods and services spending increased significantly by 94% from 2022 to 2023. This is consistent with a comparable increase of 103% at the national level.

This disproportionate growth in goods and services spending (relative to tuition fees) has led to a compositional change where goods and services now account for 65% of onshore expenditure in 2023 (Chart 16). By contrast, between 2022 and 2023 onshore students share of expenditure on tuition fees decreased by approximately six percentage points.

Besides this increase in goods and services, the composition of onshore student expenditure across industries remained similar to previous years. Onshore students continued to spend close to two-thirds (63%) of their expenditure on education and accommodation services (Figure 4).

\* Onshore international students on student visas.

**Figure 4: Onshore student export revenue by industry, 2023**



Source: Australian Bureau of Statistics, Tourism Research Australia, Deloitte Access Economics estimates.

Note: The totals (and subsequent growth rates) presented in each chart and table may differ slightly from the sum of each of the component parts due to rounding.

**Table 3: Onshore student export revenue, 2021-2022**

	2022 onshore export revenue (\$bn)	2023 onshore export revenue (\$bn)	YOY growth (%)
Goods and services	\$2.26	\$4.39	94%
Tuition fees	\$1.54	\$2.32	51%
<b>Total</b>	<b>\$3.80</b>	<b>\$6.71</b>	<b>77%</b>

Source: Australian Bureau of Statistics, Australian Government Department of Education, Deloitte Access Economics estimates.

**Chart 16: Onshore student export revenue by expenditure category, 2022 and 2023**



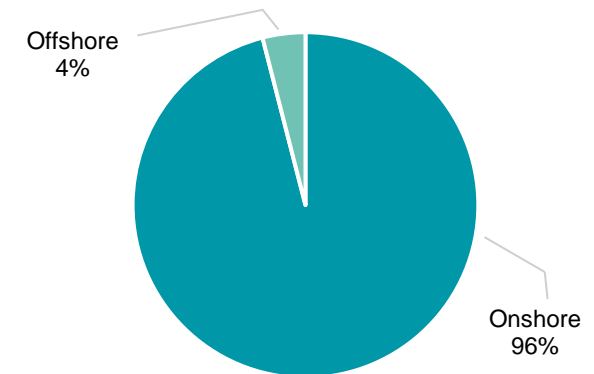
Source: Australian Bureau of Statistics, Australian Government Department of Education, Deloitte Access Economics estimates.

## Offshore student export revenue

**\$85.7m**  
in offshore export revenue in 2023

Estimated offshore student expenditure (i.e. offshore tuition fees) totalled \$85.7 million in 2023 – reflecting an 83% decrease on 2022 levels. This drop in offshore export revenue largely reflects changes in student location, where a greater proportion of students returned onshore in 2023.\* Further, this shift is reflected in the composition of onshore and offshore tuition fees. In 2022, 25% of tuition fees were incurred offshore. This has dropped by approximately 21 percentage points where in 2023, only 4% of tuition fees were incurred offshore (Chart 17).

**Chart 17: Tuition fee export revenue by student location, 2023**



Source: Australian Bureau of Statistics, Australian Government Department of Education, Australian Government Department of Home Affairs, Deloitte Access Economics estimates.

Notes: Onshore tuition fee export revenue is estimated using ABS international trade data and offshore export revenue (i.e. offshore tuition fees) is estimated using ABS correspondence course data. The methodology for calculating offshore tuition fees has been simplified for 2023 to be more fit for purpose following the pandemic recovery.

\*This shift in location was particularly notable in 2023 given some source markets such as China instituted [online learning bans](#) leaving students no choice but to return onshore.

# Export revenue

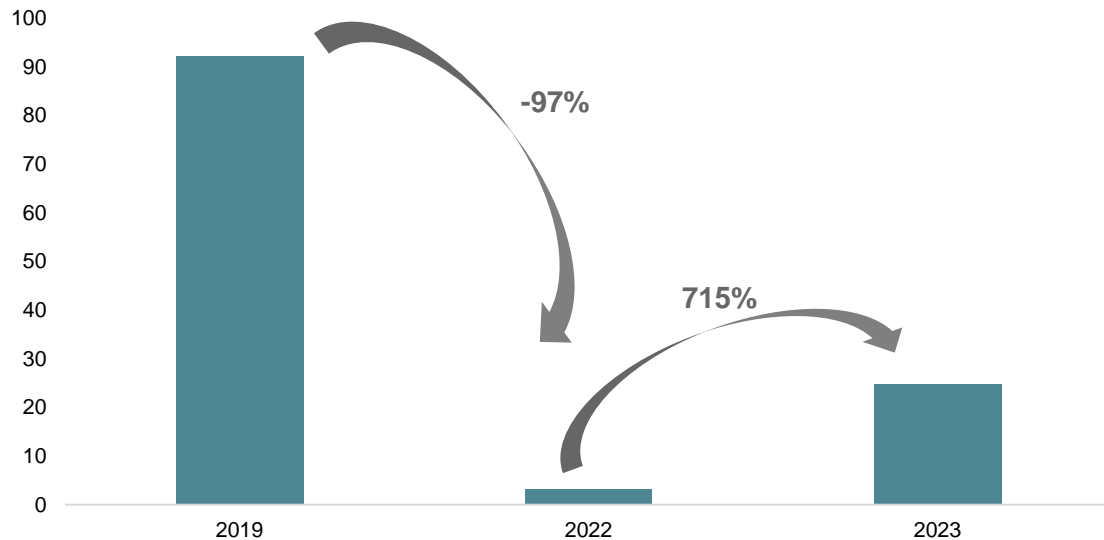
## Visiting friends and relatives

 **\$24.7m\***  
 in export revenue from visiting friends and relatives in 2023

Tourism Research Australia data indicates that in 2023, 14,000 visitors stayed for approximately 217,000 nights for the purpose of visiting an international student relative or friend in Queensland.

Export revenue from international students visiting friends and relatives (VFR) was estimated to be **\$24.7 million in 2023** - reflecting a **715% increase on 2022 levels**. While this growth represents a significant rebound from a trough during the COVID-19 pandemic, VFR spending in 2023 was significantly lower than pre-pandemic levels at just **27% of the \$92.2 million recorded in 2019** (Chart 18).

**Chart 18: QLD IET VFR export revenue, 2019, 2022-2023 (\$m)**

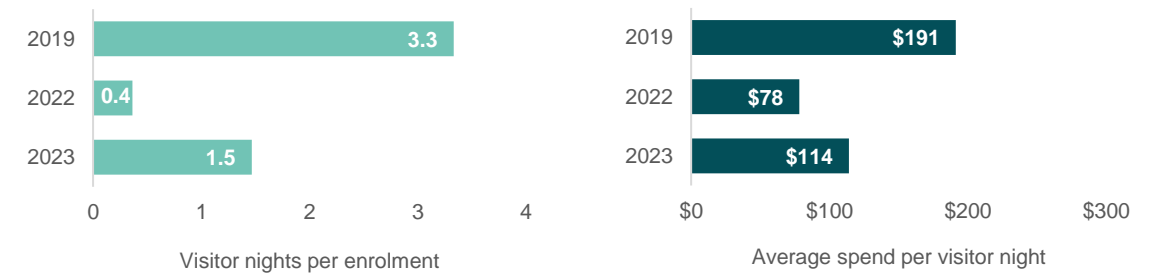


Source: Tourism Research Australia. Deloitte Access Economics estimates.

\*This estimation is based on available Tourism Research Australia data. This data is volatile meaning that actual VFR expenditure may be different than the estimated value. There has been a methodological change in the estimation of IET related VFR expenditure from 2022 to 2023 due to a change in the sampling method for data collection. See the methodology for details (pg.19).

Growth in visitor nights per enrolment and average spend per night have both independently followed similar patterns (Chart 19). Likely due to border closures, worsened economic conditions, and uncertainty surrounding international travel, both metrics fell dramatically during the pandemic before rebounding notably in 2023, but still to levels significantly below those in 2019. Total visitors and length of stay (i.e., visitor nights per visitor) rose by 295% and 46% respectively, driving VFR export revenue growth through a 459% surge in visitor nights.

**Chart 19: Visitor nights per enrolment (left) and average spend per night (right), 2019, 2022-2023**



Source: Tourism Research Australia. Australian Government Department of Education. Deloitte Access Economics estimates.

Retail trade accounts for the largest proportion of VFR expenditure, followed by food/drinks, accommodation, education and training, and transport (Chart 20). As the estimated regional allocation is based on enrolment share, most spending is in Brisbane and the Gold Coast.

**Chart 20: VFR export revenue by industry (left) and region (right), 2023**



Source: Tourism Research Australia. Australian Government Department of Education. Deloitte Access Economics estimates. 14

# Contribution of the IET sector

## Direct economic contribution

The IET sector directly contributed **\$2.83 billion** to the Queensland economy and supported **17,709 full-time equivalent (FTE)** jobs in 2023 (Table 4). This represents the value of economic activity associated with education providers and businesses that directly supply goods and services to international students and their visitors.

**Table 4: Direct economic contribution of the IET sector, 2022-2023**

	2022 value-added (\$bn)	2023 value-added (\$bn)	Growth in value-added	2022 jobs (FTE)	2023 jobs (FTE)	Growth in jobs
Onshore students	\$1.65	\$2.78	68%	9,279	17,585	90%
Offshore students	\$0.28	\$0.05	-83%	249	42	-83%
VFRs*	\$0.00	\$0.01	676%	10	82	721%
<b>IET sector</b>	<b>\$1.93</b>	<b>\$2.83</b>	<b>47%</b>	<b>9,537</b>	<b>17,709</b>	<b>86%</b>

Source: Deloitte Access Economics estimates.

Notes: (1) The underlying VFR data can be highly volatile from year-to-year, as such the results should be treated with caution. (2) The results have been rounded for reporting purposes, as such the totals (and subsequent growth rates) may not equal the sum of (or growth between) the rounded component parts.

## Indirect economic contribution

The IET sector also indirectly contributed **\$2.11 billion** and **11,997 jobs (FTE)** to Queensland in 2023 (Table 5). This represents the flow-on effects for industries that supply goods and services to the IET sector. This includes the maintenance services supplied to training providers, and the agricultural producers that restaurants source their food from.

**Table 5: Indirect economic contribution of the IET sector, 2022-2023**

	2022 value-added (\$bn)	2023 value-added (\$bn)	Growth in value-added	2022 jobs (FTE)	2023 jobs (FTE)	Growth in jobs
Onshore students	\$1.18	\$2.08	77%	6,576	11,849	80%
Offshore students	\$0.13	\$0.02	-83%	582	98	-83%
VFRs*	\$0.00	\$0.01	709%	6	50	708%
<b>IET sector</b>	<b>\$1.31</b>	<b>\$2.11</b>	<b>61%</b>	<b>7,165</b>	<b>11,997</b>	<b>67%</b>

Source: Deloitte Access Economics estimates.

Notes: (1) The underlying VFR data can be highly volatile from year-to-year, as such the results should be treated with caution. (2) The results have been rounded for reporting purposes, as such the totals (and subsequent growth rates) may not equal the sum of (or growth between) the rounded component parts.

\* Due to changes in the International Visitor Survey data collection methods, there has been a methodological change in the estimation of IET related VFR expenditure from 2022 to 2023.

## Total economic contribution



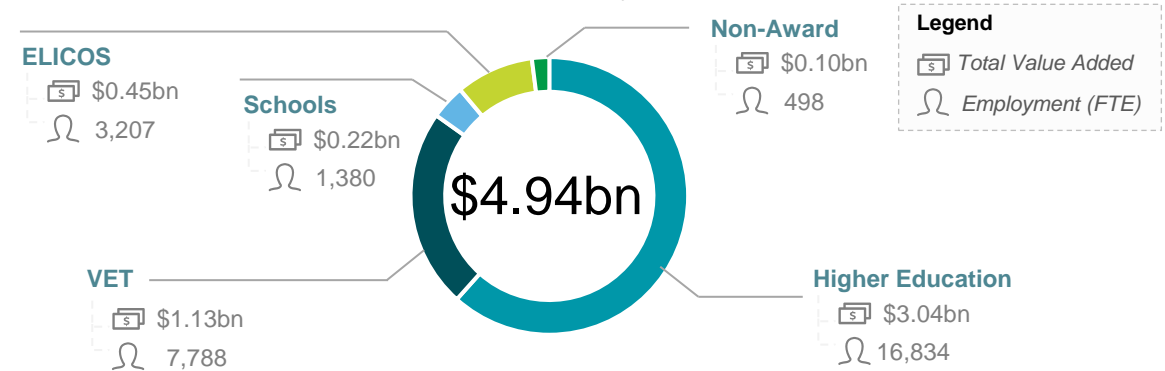
**\$4.94bn**

value added contributed to the Queensland economy by the IET sector in 2023

In total, the IET sector contributed **\$4.94 billion** to the Queensland economy and supported **29,707 full-time equivalent (FTE)** jobs in 2023 (Table 6). This represents an increase from 2022 to 2023 of 52% in terms of value added, and 78% in terms of FTE employment. Such significant growth restores the sector's total economic contribution to above pre-pandemic levels, 23% higher than \$4.02 billion value added and 8% above the 27,480 FTE jobs in 2019.

The largest contribution to total IET industry value added was made by the **Higher Education sector**, which contributed approximately 61% of the total value added in 2023 (Chart 21).

**Chart 21: Sub-sector contribution to total IET industry value added, 2023**



**Table 6: Total economic contribution of the IET sector, 2022-2023**

	2022 value-added (\$bn)	2023 value-added (\$bn)	Growth in value-added	2022 jobs (FTE)	2023 jobs (FTE)	Growth in jobs
Onshore students	\$2.83	\$4.85	71%	15,855	29,434	86%
Offshore students	\$0.41	\$0.07	-83%	830	141	-83%
VFRs*	\$0.00	\$0.02	692%	16	132	716%
<b>IET sector</b>	<b>\$3.24</b>	<b>\$4.94</b>	<b>52%</b>	<b>16,702</b>	<b>29,707</b>	<b>78%</b>

Source: Deloitte Access Economics estimates.

Notes: (1) The underlying VFR data can be highly volatile from year-to-year, as such the results should be treated with caution. (2) The results have been rounded for reporting purposes, as such the totals (and subsequent growth rates) may not equal the sum of (or growth between) the rounded component parts.

# Regional significance of IET

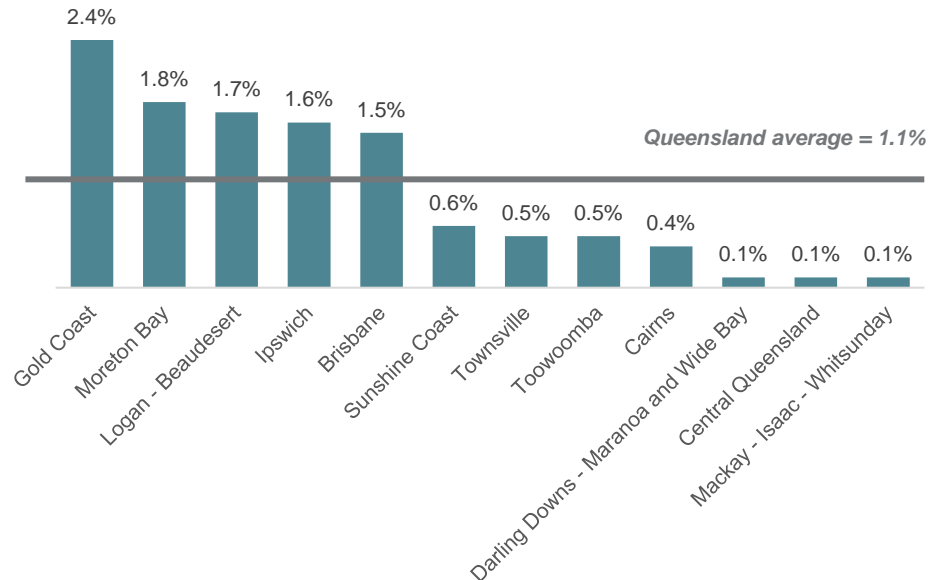
## Regional significance of IET

In 2023, it is estimated that the **IET sector directly represented 0.6% of the total Queensland economy** in value added terms.

When the indirect contribution is included, **the total contribution of the IET sector represented 1.1% of the State economy** (in terms of value added). These represent significant increases from 0.4% (direct) and 0.7% (total) in 2022.

The sector makes a **broad contribution to both metropolitan and regional areas**. In 2023, the sector made the largest proportional contribution (direct and indirect) to the **Gold Coast**, where it accounted for 2.4% of the regional economy, while four other regions have a share above 1% each including Moreton Bay, Logan – Beaudesert, Ipswich and Brisbane (Chart 22).

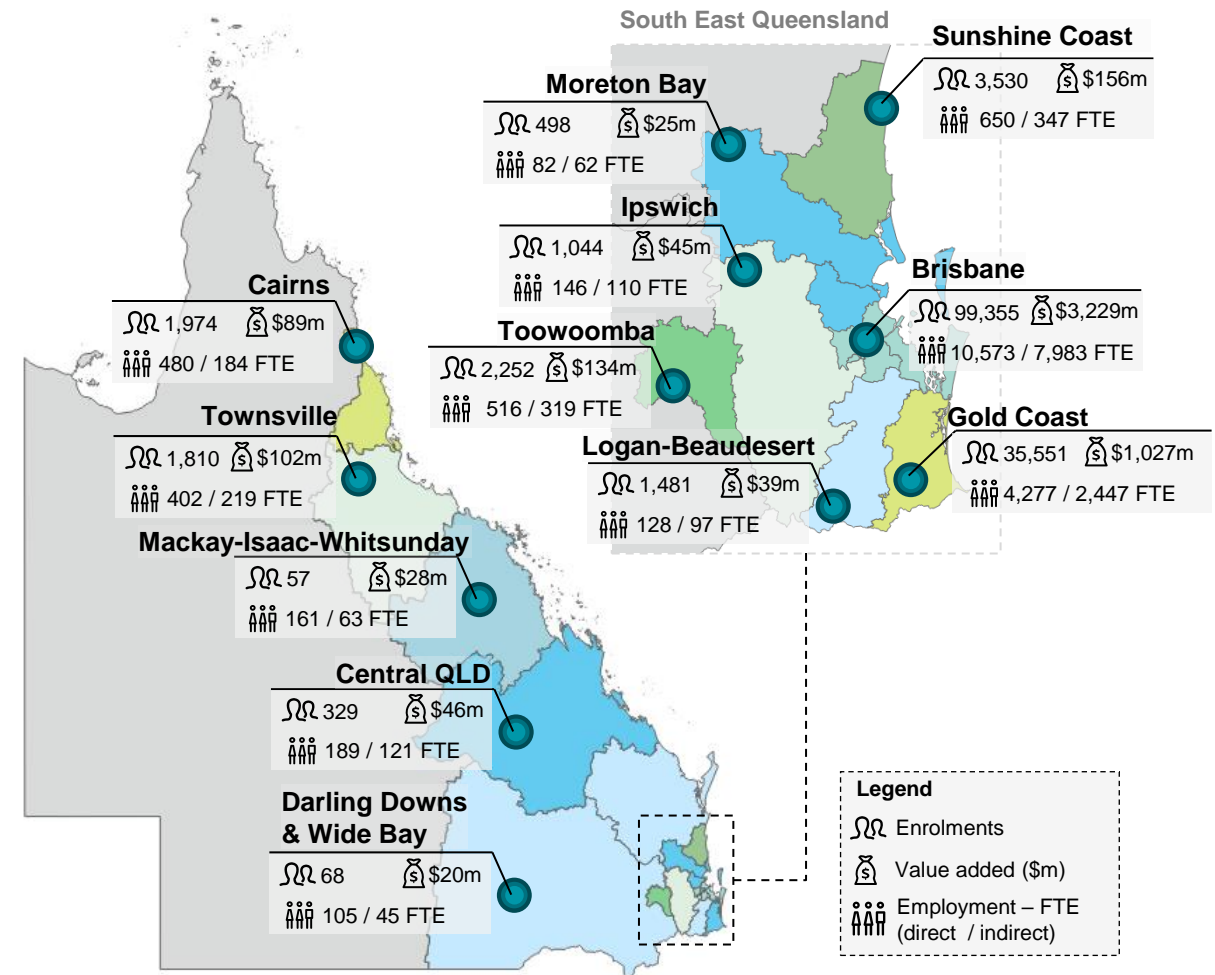
**Chart 22: Contribution of the IET sector to regional economies (total economic contribution), 2023**



Source: Deloitte Access Economics estimates.

Notes: There was no available data for Gross Regional Product in 2023 so 2022 figures were scaled by growth in Queensland's Gross State Product from 2022-23 (obtained from the ABS) to obtain size of regional economy.

**Figure 5: IET total contribution to regional economies, 2023**



**Legend**

- Ω Enrolments
- 💰 Value added (\$m)
- 👤 Employment – FTE (direct / indirect)



# IET ecosystem

## Key industries

In 2023, the IET sector directly supported a variety of industries, the most significant of which were **accommodation** (37% of direct FTE employment in the IET sector in 2023), **cafes, restaurants and takeaway food services** (17%) and **retail trade** (13%) (Table 7).

**Table 7: Direct employment breakdown by IET industry (economic contribution), 2023**

Industry	Direct employment (FTE)	Direct employment (%)
Accommodation	6,470	37%
Cafes, restaurants and takeaway food services	2,943	17%
Retail trade	2,265	13%
Road transport and transport equipment rental	1,265	7%
Education and training	1,202	7%
All other industries	1,104	6%
Clubs, pubs, taverns and bars	1,047	6%
Other sports and recreation services	561	3%
Cultural services	292	2%
Air, water and other transport	240	1%
Casinos and other gambling services	186	1%
Rail transport	133	1%
<b>Total</b>	<b>17,709</b>	<b>100%</b>

Source: Deloitte Access Economics estimates.

## Other cohorts of international students

While the economic contribution analysis in this factsheet is limited to students on subclass 500 student visas (which represent the vast majority of international students), it is acknowledged that some other visa holders also engage in study while abroad. Students who hold other visas also contribute economically, socially and culturally to the Queensland economy, including:



### ELICOS students

English Australia indicated that approximately 27% of ELICOS students in Queensland held a non-student visa (e.g. visitor visa, working holiday visa, or other/no visa) in 2023.<sup>1</sup>

<sup>1</sup> English Australia, National ELICOS Market Report 2023, <https://www.englishaustralia.com.au/documents/item/2442>



### Study tours

Study tours combine education, cultural exchange and tourism activities for students. International students on study tours may hold a subclass 600 visitor visa.<sup>2</sup>

<sup>2</sup> Australian Government, Other ways to study, <https://www.studyaustralia.gov.au/en/plan-your-studies/other-ways-to-study>

# Understanding economic contribution

## Defining economic contribution

Economic contribution is an estimate of how much economic activity an entity (e.g. sector, industry etc) contributes to an economy in a defined period of time. Two metrics are used to estimate an entity's contribution to an economy, including:

- **Value added:** A measure of the entity's return on capital and labour (Figure 6). It is the indication of the entity's value and contribution to an economy.
- **Employment:** The number of jobs supported by the entity in full-time equivalent (FTE) terms.

For both measures of economic contribution, a direct and indirect contribution component is estimated:

- **Direct contribution:** Represents the flow from labour and capital involved in direct economic activity.
- **Indirect contribution:** Measures the demand for goods and services produced in other sectors as a result of demand generated by the direct economic activity.
- **Total contribution:** Summation of direct and indirect contribution.

The two metrics of economic contribution (i.e. value added and employment) are estimated using an economic contribution model. See pg.19 for methodological details.

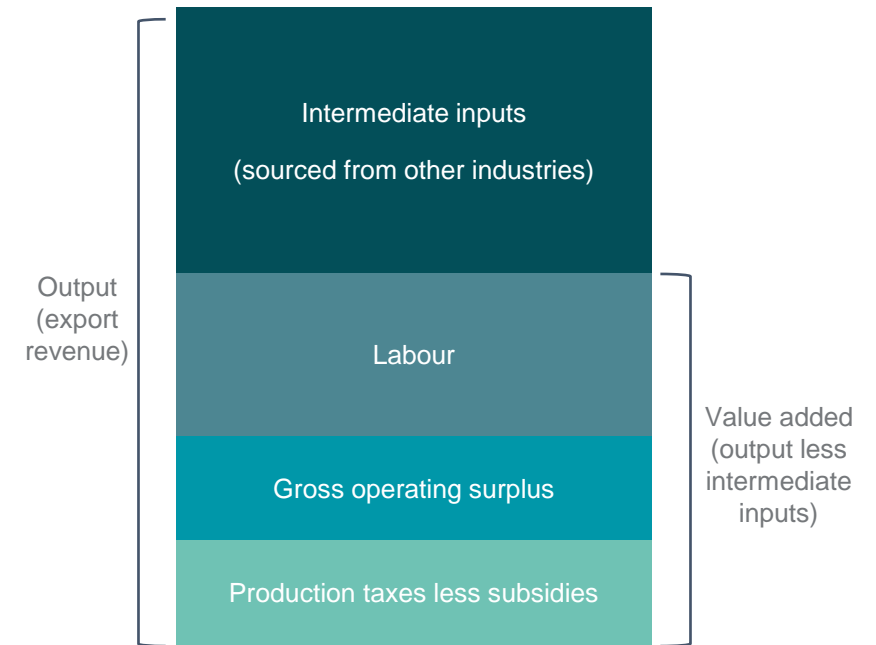
## Economic contribution in the IET context

An economic contribution model can be used to estimate the total economic contribution (i.e. value added and employment) of IET students to the Queensland economy (including contributions to regional economies) in a given year. This factsheet summarises the results from an economic contribution model which estimates the value added and employment supported by Queensland's IET students (on student visas) in CY2023.

Export revenue (i.e. output) captures where international students are based and spend their money. Economic contribution (GVA and employment) captures where the economic activity resultant from international student spending occurs. While a large proportion of economic activity occurs locally, some activity can occur in other regions, including through students travelling to the area and spending money on goods and services, or businesses in one region supplying goods and services being consumed by students in other regions. In smaller regional markets, a substantial portion of the economic contribution of the sector is driven by students from other regions in Queensland. As such, some regions will obtain indirect economic contribution from other regions, leading to gross value added (which is derived based on student export revenue across multiple regions) being greater than export revenue in some instances.

Economic contribution is driven by IET student expenditure on (1) Goods and services (2) Tuition fees and (3) The expenditure of student's visiting friends and relatives<sup>^</sup>. The summation of student expenditure provides an estimate of export revenue, which is a key input into the economic contribution model. As economic contribution is a derivative of export revenue, **export revenue and value added should not be summed.**

Figure 6: National accounting framework



Source: Deloitte Access Economics

## Using the economic contribution results

For consistency in reporting, value added and employment (rather than export revenue) are the appropriate metrics to use in measuring the significance of the IET sector to a region. While it is appropriate to refer to the *total* value added and employment when referring to the overall size or contribution of the IET sector in a particular region, only the *direct* value added and employment figures should be used when comparing the IET sector against other industries within the same region.

<sup>^</sup>Visitors who specifically indicate in the International Visitor Survey that they are visiting Queensland for the purpose of visiting an international student.

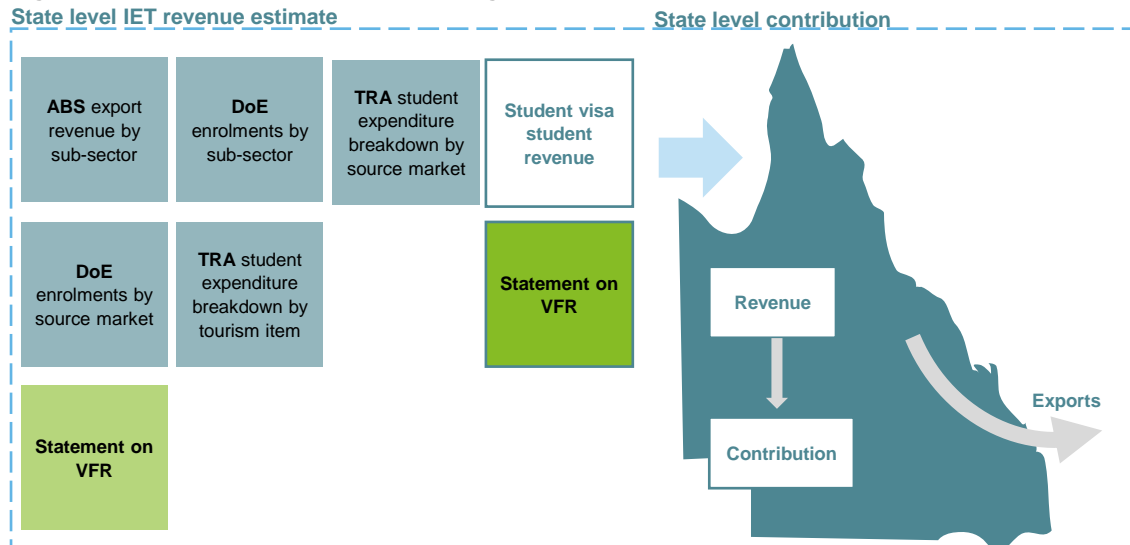
# Methodology

## Model overview

The economic contribution estimates presented in these factsheets (including both value added and employment) represent the total economic contribution of international students in Queensland to a specific region (e.g. Brisbane or Cairns). This means that in smaller regional markets (e.g. Mackay) a substantial portion of the economic contribution of the sector is driven by students from other regions in Queensland travelling to the area and spending money on goods and services, or local businesses supplying goods and services being consumed by students in other regions.

Trade and Investment Queensland (TIQ) has worked with Deloitte Access Economics to produce consistent and comparable regional estimates of the contribution of IET to Queensland and its regions. The contribution analysis in this report considers the contribution of international students who hold a student visa. Economic contribution estimates are produced using modelling assumptions consistent with Tourism Research Australia's (TRA) latest available Regional Tourism Satellite Account (RTSA) model. This input-output model is the most contemporary and sophisticated of its kind in Australia, and been applied in a wide range of contexts to understand the economic contribution of tourism related industries. TRA are due to update the model benchmarks in 2024, where it is anticipated that the production structures could shift considerably. This update will have implications for future economic contribution modelling exercises and the results they generate.

**Figure 7: Economic contribution modelling overview**



Source: Deloitte Access Economics

## Key data sources and methodological notes

The contribution analysis in this report has been informed by publicly available data (Figure 7) including: enrolment and commencement data from the Australian Government Department of Education (DoE), student visa data from the Department of Home Affairs (DoHA), export revenue data from the Australian Bureau of Statistics (ABS) and expenditure item and visiting friends and relatives data from Tourism Research Australia (TRA). The frequency of data publication is dependent on the data custodian where some data is published on a monthly basis<sup>^</sup> (e.g. DoE enrolment and commencement data) while other data is published on an annual basis (e.g. ABS and TRA data). In 2023, the latest available SA4 data on enrolments and commencements only accounted for October year-to-date. As a result, Deloitte Access Economics was required to extrapolate this data to obtain full calendar year estimates by assuming that the proportion of enrolments and commencements in each SA4 in the first 10 months by sector remained consistent in November and December. Analytical checks verified the robustness of this approach.

During COVID-19 there was an increase in the number of international students studying offshore. However, this trend has reversed noticeably in 2023 following post-pandemic recovery. While offshore export revenue (i.e. offshore tuition fees) is still estimated using the ABS correspondence course data as in previous years, more detailed methodological calibrations are no longer fit-for-purpose and have been removed.

Tourism Research Australia data is used to estimate the expenditure of international students' visiting friends and relatives (VFRs). VFRs are visitors who specifically indicate in the International Visitor Survey (IVS) that they are visiting Queensland for the stopover purpose of visiting an international student. From April 2020 to December 2022, the IVS was imputed using Overseas Arrivals and Departures data. However, for 2023, the collection returned to conducting interviews, sampling 30,000 departing, short-term international travellers aged 15 years and over who had been visiting Australia. A more detailed summary of the methodology can be found [here](#). The updated data collection method has considerably reduced the sample size of key IVS variables. To avoid the risk of volatility skewing the robustness of the estimates, the national average VFR expenditure per night has been adopted for all source markets with a sample size below 30.

### Disclaimer

These are Deloitte Access Economics' estimates for international student enrolments and contribution based on the best available data. The results do not include the contribution to Queensland from international students studying elsewhere in Australia (e.g. through tourism).

The information presented in this factsheet is distributed by the Queensland Government as an information source only. The Queensland Government makes no statements, representations, or warranties about the accuracy or completeness of, and you should not rely on, any information contained in this publication.

<sup>^</sup> Enrolment data is updated in each data release, meaning that historical enrolment counts may change over time.