International education & training snapshot:

Sunshine Coast 2024

Publication date: August 2025

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$142 m — **Gross Value Added** to the Sunshine Coast economy by the IET sector in 2024
9% lower than 2023

846 — **Employment (FTE)** supported by the Sunshine Coast IET sector in 2024
15% lower than 2023

$163 m — **Export revenue** generated through the Sunshine Coast IET sector in 2024
5% lower than 2023

3,406 — **International student enrolments** in 2024
1% lower than 2023

24 — **Providers** operating in the Sunshine Coast as at December 2024
8% lower than 2023

International student enrolments and commencements

International student enrolments

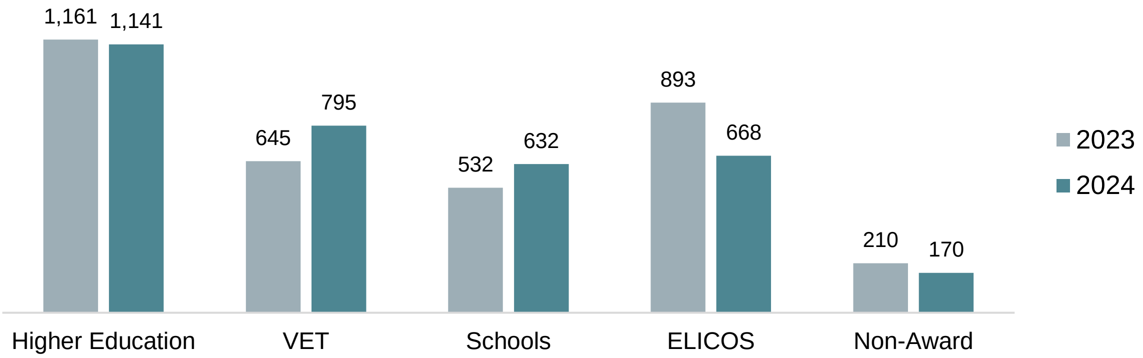
3,406
enrolments in 2024

In 2024, international student enrolments in the Sunshine Coast totalled 3,406. As in 2023, **Higher Education (HE)** remained the largest subsector, with **1,141** enrolments, followed by Vocational Education and Training (VET) and English Language Intensive Courses for Overseas Students (ELICOS) subsectors (Chart 1).

↓ 1%

Total international student enrolments in the Sunshine Coast **decreased by 1%** compared with 2023 levels. This was driven by a decline in ELICOS (-25%), HE (-2%), Non-Award (-19%), despite growth in the VET (23%) and Schools (19%) subsectors.

Chart 1: IET enrolments by subsector between 2023 and 2024



Source: Australian Government Department of Education, international student enrolments by SA4, in December of each year. Data as of May 2025 release.

International student commencements

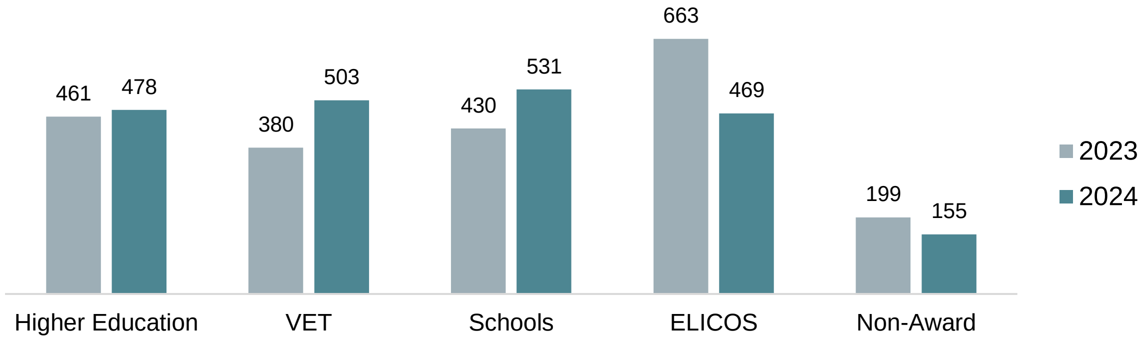
2,136
commencements in 2024

In 2024, international student commencements in the Sunshine Coast **totalled 2,136**. In contrast to 2023, Schools were the largest subsector, with **531** commencements, followed by the VET and HE subsectors (Chart 2).

↑ 0.1%

Total international student commencements in the Sunshine Coast **increased by 0.1%** compared with 2023 levels. This was driven by growth in HE (4%), Schools (24%), and VET (32%), despite a decline in the Non-Award (-22%) and ELICOS (-29%) subsectors.

Chart 2: IET commencements by subsector between 2023 and 2024



Source: Australian Government Department of Education, international student commencements by SA4, in December of each year. Data as of May 2025 release.

Notes: (1) The results presented in the charts, tables and analysis in this document 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. (2) Figures in this document may vary to other data sources due to data revisions in subsequent releases and restricted reporting in regions with less than five enrolments or commencements.

Enrolments, commencements, providers, and courses

Enrolments by source market

The largest source markets for international student enrolments in the Sunshine Coast continued to be **Germany and Brazil,** which together accounted for **22%** of total enrolments in 2024 (Table 1). Within the Sunshine Coast's top five enrolment source markets, only Germany and Nepal observed growth in enrolments between 2023 and 2024.

Table 1: Enrolments in top five source markets, 2023 and 2024

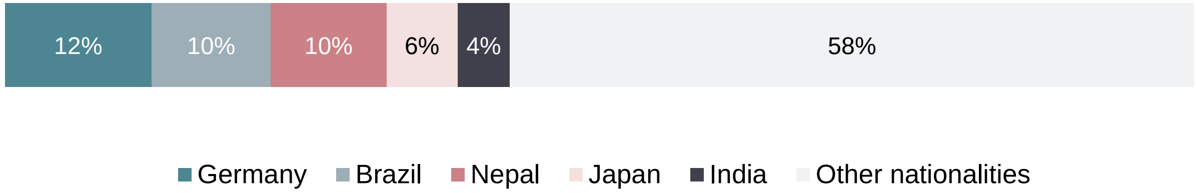
	2023		2024		
	Enrolments	Share	Enrolments	Share	Growth (share)
Germany	367	11%	422	12%	↑
Brazil	344	10%	341	10%	–
Nepal	305	9%	333	10%	↑
Japan	235	7%	203	6%	↓
India	191	6%	151	4%	↓

Source: Australian Government Department of Education, international student enrolments by SA4, May 2025 release.

Source market concentration

Enrolments in the Sunshine Coast's top five source markets accounted for **42% of the region's international student enrolments** in 2024 (Chart 3). The Sunshine Coast's source market concentration is lower than the total Queensland market, where the top five source markets accounted for 52% of international student enrolments.

Chart 3: Source market concentration, 2024



Source: Australian Government Department of Education, international student enrolments by SA4, 2024 Dec YTD.

Enrolments and commencements by broad field of education

Table 2: Enrolments and commencements for top five broad fields of education, 2024

Field of education	Enrolments	Share	Commencements	Share
Mixed Field Programmes	923	27%	758	35%
Society and Culture	856	25%	535	25%
Health	522	15%	164	8%
Management and Commerce	426	13%	282	13%
Food, Hospitality and Personal Services	236	7%	168	8%
Other	443	13%	229	11%

Source: Australian Government Department of Education, international student enrolments and commencements by SA4, May 2025 release. Note: top five broad fields of education are ranked by enrolments.

CRICOS providers and courses^

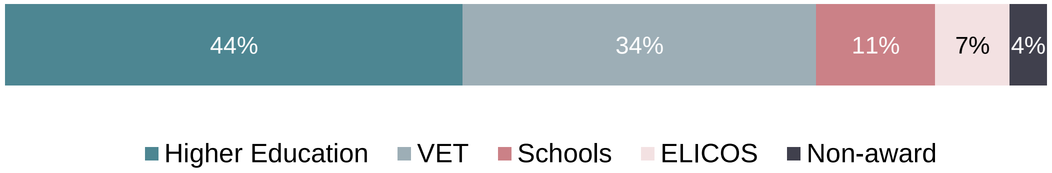
Table 3: CRICOS providers and courses between 2023 and 2024

	2023	2024	Growth
Providers	26	24	-8%
Courses	322	280	-13%

Source: Deloitte Access Economics estimates using Australian Government Department of Education data.

44% of courses offered in the Sunshine Coast were in the Higher Education subsector (Chart 4).

Chart 4: Share of CRICOS courses by IET subsectors in the Sunshine Coast, 2024



Source: Deloitte Access Economics estimates using data from the Australian Government Department of Education.

^ 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. Further, similar courses may be delivered by dual-sector institutions so the matching between course and sector may differ to the estimates.

Export revenue in the IET sector

Export revenue

$163m

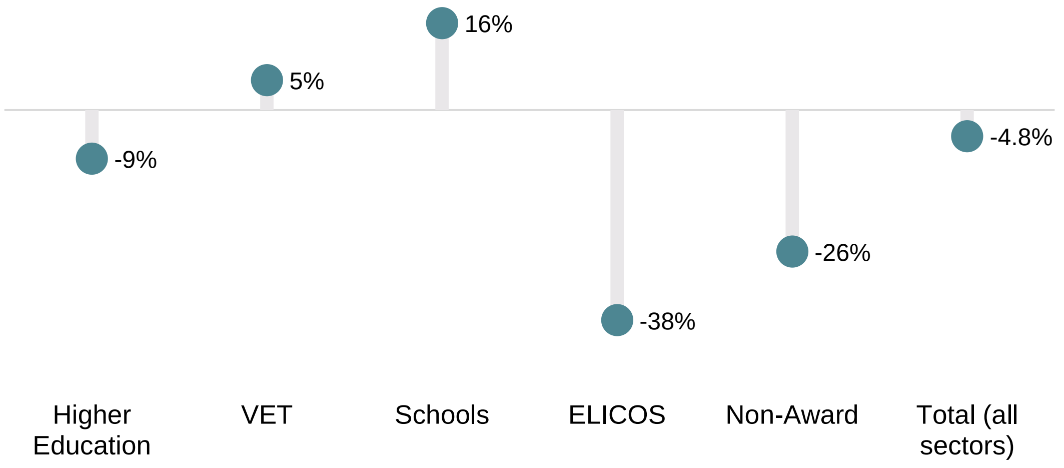
Export revenue in 2024

Total export revenue from international student expenditure on tuition fees, goods and services, and visiting friends and relatives (VFR) expenditure was **$163 million** in 2024, a decrease of 5% compared with 2023 (Chart 5). This growth was lower than that of enrolments (-1%), primarily due to a decrease in student spending on goods and services. Onshore student expenditure accounted for 99% of the Sunshine Coast's total export revenue, with the final 1% made up of offshore students and VFRs.

The Sunshine Coast accounted for **2%** of Queensland's IET export revenue in 2024. The HE subsector made the largest contribution to IET export revenue in the Sunshine Coast, contributing **$81 million**, or 50% towards IET export revenue.

Export revenue increased across all subsectors except for the HE, Non-Award, and ELICOS subsectors, which fell by 9%, 26% and 38%, respectively.

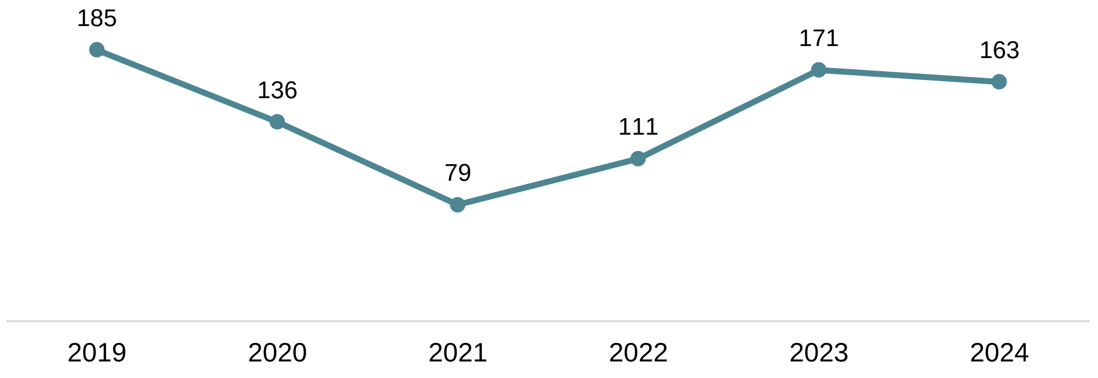
Chart 5: Export revenue growth by IET subsector between 2023 and 2024



Source: Deloitte Access Economics estimates using Australian Bureau of Statistics (ABS), Tourism Research Australia (TRA), and Australian Government (Commonwealth) Department of Education data.

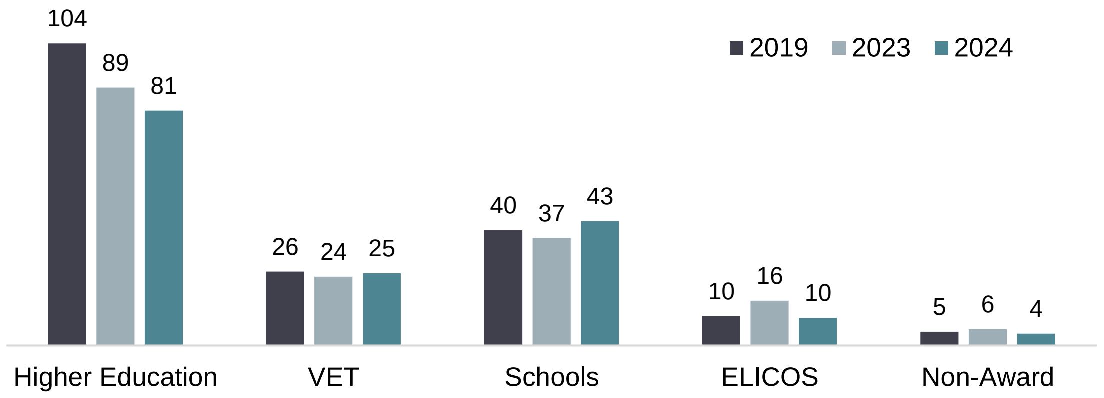
The Sunshine Coast's IET export revenue fell by 12% between 2019 and 2024 (Chart 6). Over the last five years, there has been growth in export revenue in the Schools subsector (8%).

Chart 6: IET export revenue between 2019 and 2024 ($m)



Source: Deloitte Access Economics estimates using ABS, TRA, and Commonwealth Department of Education data.

Chart 7: IET export revenue by subsector, 2019, 2023 and 2024 ($m)



Source: Deloitte Access Economics estimates using ABS, TRA, and Commonwealth Department of Education data.

Economic contribution of the IET sector

Total economic contribution

$142m

value added to the Sunshine Coast region by the IET sector in 2024

In total, the IET sector contributed **$142 million** and supported **846 full-time equivalent (FTE) jobs** in the Sunshine Coast region in 2024. This represents a decrease of **9%** in total value-added, and **15%** in employment from 2023.

Key industries

The expenditure of international students on various goods and services supports the direct employment of 552 FTE across a variety of industries as shown in Table 4. More than half of this employment (60%) is in accommodation, and cafes, restaurants and takeaway food services.

Table 4: Direct employment breakdown by industry supported by international student spending, 2024

Tourism employment industry	Direct employment (FTE)	Share of total
Accommodation	232	42%
Cafes, restaurants and takeaway food services	99	18%
Retail trade	58	11%
Education and training	46	8%
Clubs, pubs, taverns and bars	31	6%
Road transport and transport equipment rental	30	6%
Other sports and recreation services	14	3%
Cultural services	12	2%
Air, water and other transport	4	< 1%
Casinos and other gambling services	2	< 1%
Rail transport	1	<1%
All other industries	22	4%
Total	**552**	**100%**

Source: Deloitte Access Economics estimates. Note: 'Tourism employment industry' is the standard classification set by the ABS Tourism Satellite Account methodology and map to ABS ANZSIC. 'Rail transport' is separately identified and 'Travel agency and information centre services' is excluded given zero direct employment.

Direct economic contribution

The direct economic contribution represents the value of economic activity associated with businesses that directly supply goods and services to international students and their visitors. In 2024, the IET sector directly contributed **$88 million** and supported **552 FTE** jobs in the Sunshine Coast region (Table 5).

Table 5: Direct economic contribution of the IET sector, 2023 and 2024

	Value-added ($m)			Jobs (FTE)		
	2023	2024	Growth	2023	2024	Growth
Onshore students	$93	$87	-6%	646	551	-15%
Offshore students	$1	$1	-60%	2	1	-60%
VFRs	$0	$0	-84%	3	0	-85%
IET sector	**$95**	**$88**	**-7%**	**650**	**552**	**-15%**

Source: Deloitte Access Economics estimates.

Indirect economic contribution

The indirect economic contribution represents the flow-on effects for industries that supply goods and services to the IET sector, such as maintenance services supplied to training providers and the agricultural producers that supply to restaurants. The IET sector indirectly contributed **$54 million** and supported **294 FTE** jobs in the Sunshine Coast region in 2024 (Table 6).

Table 6: Indirect economic contribution of the IET sector, 2023 and 2024

	Value-added ($m)			Jobs (FTE)		
	2023	2024	Growth	2023	2024	Growth
Onshore students	$60	$54	-10%	342	293	-15%
Offshore students	$1	$0	-60%	3	1	-61%
VFRs	$0	$0	-84%	1	0	-85%
IET sector	**$61**	**$54**	**-10%**	**347**	**294**	**-15%**

Source: Deloitte Access Economics estimates.

Economic contribution modelling FAQs

Understanding economic contribution modelling

Economic contribution modelling is used to estimate 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 contribution to an economy, including:

- **Value added:** A measure of a sector's return on capital and labour. It is the indication of the sector's value and contribution to an economy.
- **Employment:** The number of jobs supported by the sector 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.

Economic contribution modelling in the IET context

Export revenue 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. 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.***

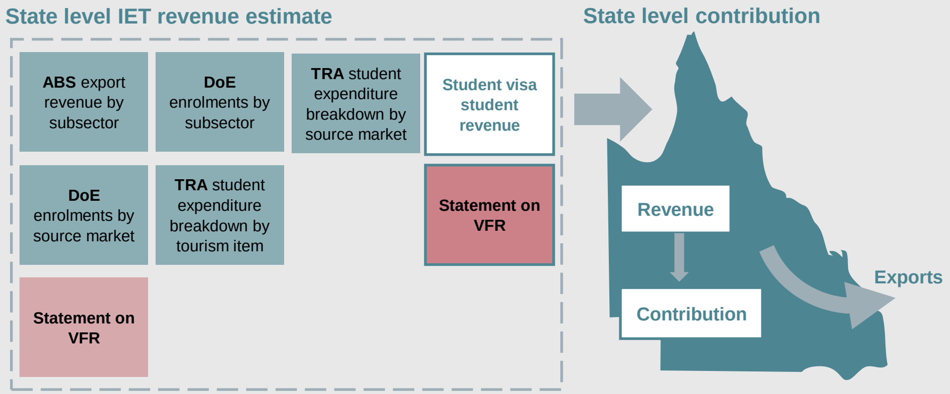
Economic contribution model

The economic contribution estimates in this report are produced using modelling assumptions consistent with Tourism Research Australia's 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. Future updates to model benchmarks could shift production structures, with implications for future economic contribution modelling exercises and the results they generate. In 2024, the modelling estimates for employment (FTE) were adjusted to account for nominal wage rises. The model produces results for each factsheet region based on a correspondence with tourism regions, tourism products, and tourism employment industry classifications.

Data sources

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 has been informed by publicly available data 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 TRA. The frequency and availability of data is dependent on the data custodian.^

The DoE data for enrolments by SA4 region have historically included a small number of unallocated enrolments such that the total enrolments and commencements across each region differ slightly from the overall total for Queensland. In 2024, this number of unallocated enrolments increased significantly from approximately 1% of all enrolments to approximately 6%, leading to a larger divergence than in previous years. In the modelling process, export revenue is distributed to the regions based on the known enrolment share (with unallocated enrolments distributed proportionally).



Using 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.

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.

^ Enrolment and commencement data is updated in each data release, meaning that historical counts may change over time.