International education & training snapshot:

Queensland 2024

Publication date: August 2025

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$4.73bn — **Gross Value Added** to the Queensland economy by the IET sector in 2024
↓ *4% lower than 2023*

26,040 — **Employment (FTE)** supported by the Queensland IET sector in 2024
↓ *12% lower than 2023*

$6.89bn — **Export revenue** generated through the Queensland IET sector in 2024
↑ *1% higher than 2023*

157,658 — **International student enrolments** in 2024
↑ *7% higher than 2023*

368 — **Providers** operating in Queensland in 2024
↑ *1% higher than 2023*

Performance of the sector in 2024

IET sector in Queensland

$6.89bn — **Export revenue** generated through the Queensland IET sector in 2024, which accounted for just under half (approximately 41%) of Queensland's service exports.^

↑ **1% increase** in export revenue in 2024

$4.73bn — **Gross Value Added** contributed to the Queensland economy by the IET sector in 2024. This represents **1.0% of the State economy** in value added terms.

↓ **4% decrease** in gross value added in 2024

26,040 — **Employment (FTE)** supported by the Queensland IET sector in 2024. This represents **1.0% of the State's FTE jobs.**

↓ **12% decrease** in FTE in 2024

^ *Includes onshore and offshore tuition fees.*

Export revenue from 2019 to 2024

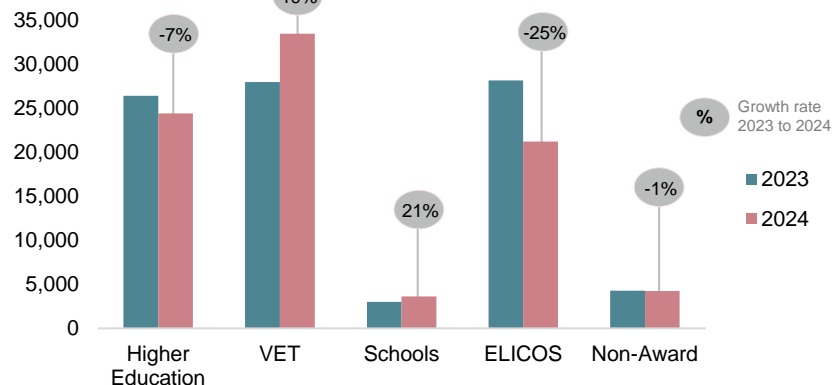Total export revenue in 2024 continues to exceed pre-pandemic levels, now 21% above the $5.69bn recorded in 2019.

Line chart (Billions): 2019 $5.69, 2020 $4.92, 2021 $3.86, 2022 $4.30, 2023 $6.82, 2024 $6.89
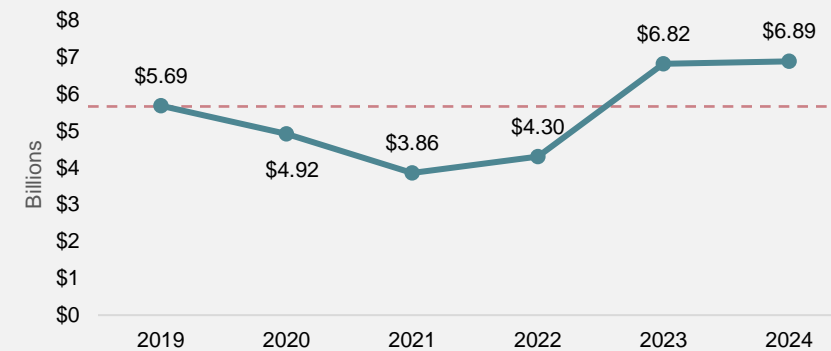
International education and training in Queensland 2024 – at a glance

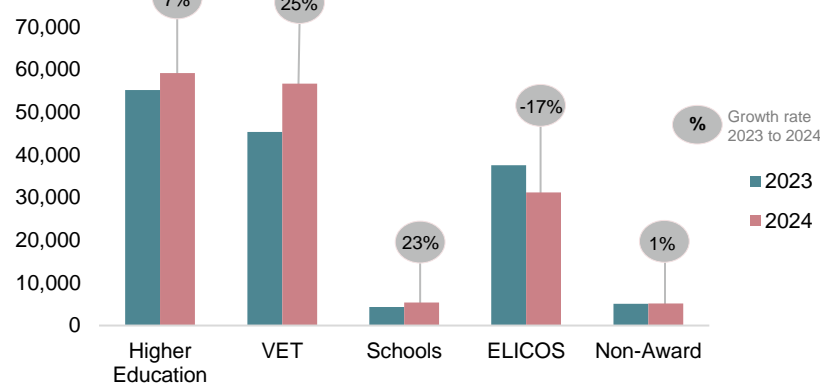**87,026** international student **commencements** in 2024

→ **3%** lower than 2023

→ **15% of national commencements**

Commencements bar chart (2023 vs 2024) with growth rate 2023 to 2024:
- Higher Education: -7%
- VET: 19%
- Schools: 21%
- ELICOS: -25%
- Non-Award: -1%

157,658 international student **enrolments** in 2024

→ **7%** higher than 2023

→ **14% of national enrolments**

Enrolments bar chart (2023 vs 2024) with growth rate 2023 to 2024:
- Higher Education: 7%
- VET: 25%
- Schools: 23%
- ELICOS: -17%
- Non-Award: 1%

Student visa activity

Visa activity declined across all of Queensland's top enrolment source markets from 2023 to 2024. However, the extent of this decline varied substantially by source market.
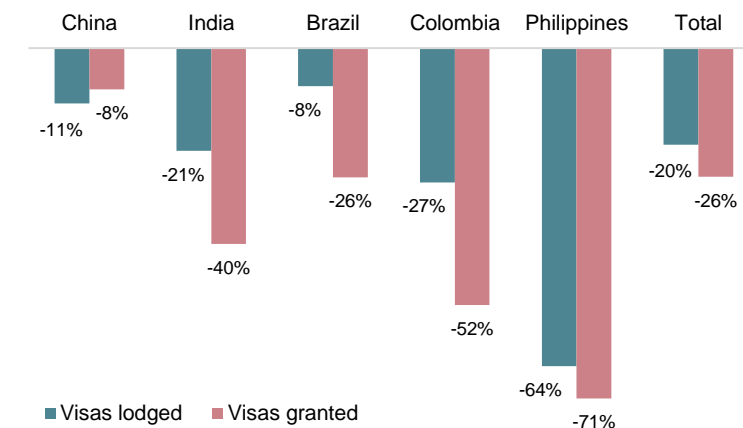
Visa activity chart (Visas lodged, Visas granted):
- China: -11%, -8%
- India: -21%, -40%
- Brazil: -8%, -26%
- Colombia: -27%, -52%
- Philippines: -64%, -71%
- Total: -20%, -26%

Contents

Abbreviations:

IET – International Education and Training
HE – Higher Education
VET – Vocational Education and Training
ELICOS – English Language Intensive Courses for Overseas Students

IET policy landscape

The Queensland IET Sector

The Queensland International Education and Training (IET) sector is facing global shifts and challenging headwinds including:

- restrictive policies in response to changing migration sentiment
- changing markets driven by demographic and economic growth
- changing student preferences increasingly based on affordability and employment outcomes over ranking, and
- emerging competitors competing on access, relevance, and value.

Study Queensland (SQ), a business unit within Trade and Investment Queensland, is dedicated to promoting Queensland as a premier study destination and a preferred partner for education, training, research and innovation. SQ works with local and global partners to:

(1) **Promote Queensland** as a leading global destination for quality education and enriching experiences by:

- Showcasing Queensland's education strengths internationally
- Creating networks and opportunities for international students
- Driving global engagement through alumni and business connections

(2) **Grow and diversify** Queensland's education footprint for a future-ready workforce by:

- Supporting career pathways and talent ecosystems
- Attracting global talent for priority industries
- Strengthening partnerships in emerging and established markets

(3) **Foster sector growth** in key international markets and build long-term resilience in the face of changes by:

- Enhancing the Queensland study experience
- Advocating for the international education sector
- Building sector capability and innovation.

The upcoming Brisbane 2032 Olympic and Paralympic Games presents a transformational opportunity to elevate Queensland's profile on the global stage, deepen our international ties and strengthen our appeal to international students.

Queensland's Regions

Queensland has the most regionalised IET sector in Australia. Almost half of Queensland's IET providers are registered outside of Brisbane, and Queensland has the highest proportion of international students studying outside a capital city.

To support our regions, SQ's Regional Funding Framework provides grant funding to five study clusters across Queensland (Cairns, Townsville, Sunshine Coast, Toowoomba and Gold Coast).

Study clusters undertake a wide range of activities in their region in collaboration with SQ, including Student Ambassador programs, regional specific promotional activity, industry events, student events, training, and employability programs to connect students with industry.

SQ will continue to promote the quality and diversity of Queensland's international education and training offerings, world class research and innovation capabilities, and lifestyle options located throughout the state.

National policy landscape

After a review into the Migration System in March 2023, the Australian Government introduced numerous policy reforms aimed at improving the integrity, quality and sustainability of the sector and at reducing net overseas migration levels.

The impact of these reforms has increased uncertainty among IET providers and international students and led to a softening in demand for IET in Queensland.

Globally, changing policy and geopolitical landscapes presents both challenges and opportunity for international education. Restrictive IET and migration policies by traditional competitor countries such as the UK, Canada and the USA open opportunities for further growth, while also leading to the emergence of alternative education destinations as international students seek affordability, stability and opportunity.

SQ continues to monitor and assess the changing policy and geopolitical landscapes facing the Queensland IET sector, and to advocate at both a state and national level.

International student enrolments

157,658 enrolments in 2024   ↑ **7%**

In 2024, international student enrolments in Queensland continued to grow. Enrolments rose to **157,658, 7% higher than the previous year**. This was an extension of the post-COVID rebound in enrolments, which began in 2022 and then accelerated throughout 2023. (Chart 1).

As in 2023, **Higher Education and VET remained the two largest IET subsectors,** with 59,219 and 56,688 enrolments respectively (Table 1). However, VET has noticeably closed the gap with Higher Education, recording 25% growth between 2023 and 2024 – the highest of any subsector and much greater than the 7% growth experienced by Higher Education.

Enrolments in Schools continued to grow, up 23% to 5,380 in 2024. After significant growth of 110% between 2022 and 2023, enrolments in ELICOS declined by 17% to 31,230 after changes to student visa fees and other migration policies. Meanwhile, the Non-award subsector held comparatively steady, growing by 1% to 5,141 enrolments.

These results reflect not only the ongoing post-pandemic recovery but also some changes in the distribution of enrolments across subsectors.

Table 1: Enrolments by subsector, 2023-2024

	2023 enrolments	2024 enrolments	YOY growth
Higher Education	55,220	59,219	7%
VET	45,354	56,688	25%
Schools	4,358	5,380	23%
ELICOS	37,550	31,230	-17%
Non-award	5,066	5,141	1%
Total	**147,548**	**157,658**	**7%**

Source: Australian Government Department of Education, international student enrolment data. Enrolments in December of each year. Data as of April 2025 release.

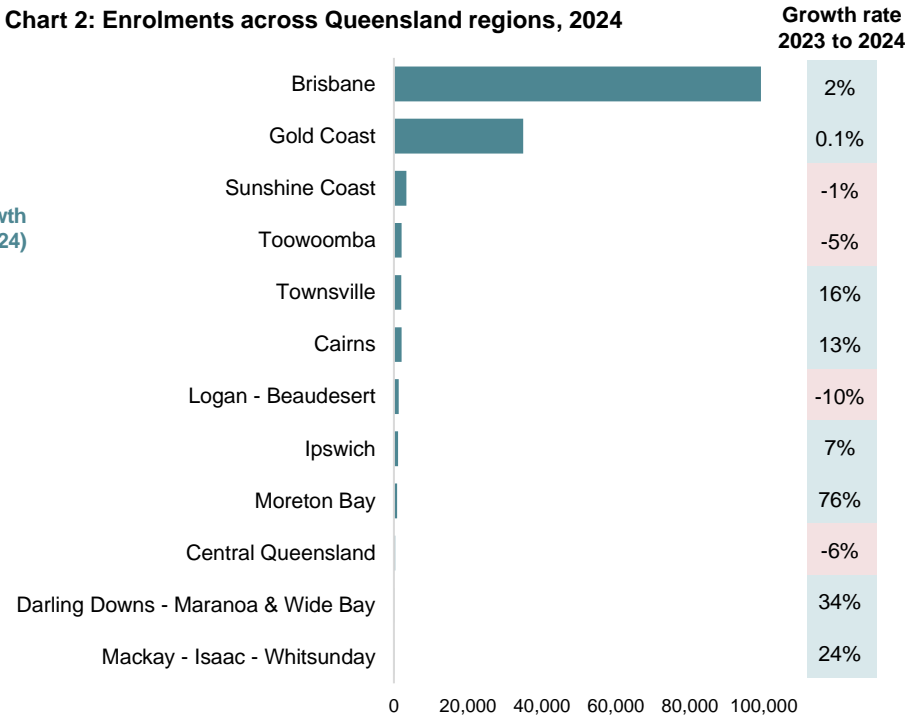**Chart 1: IET enrolments by subsector, 2011-2024**
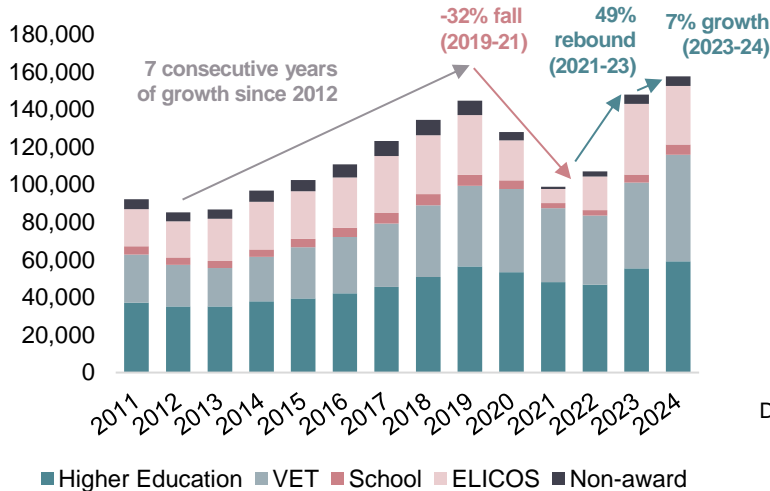
Source: Australian Government Department of Education, international student enrolment data. Enrolments in December of each year. Data as of May 2025 release.

Enrolments by region

Brisbane remains the largest region for enrolments accounting for approximately 67% of allocated IET enrolments.* Both it, and the second largest region, the Gold Coast, experienced minimal growth between 2023 and 2024 (Chart 2).

Most of Queensland's smaller regions experienced significant enrolment growth between 2023 and 2024. Moreton Bay experienced the largest growth (76%) of all regions, albeit from a small base of 494 in 2023, to 867 in 2024.

Chart 2: Enrolments across Queensland regions, 2024

Region	Growth rate 2023 to 2024
Brisbane	2%
Gold Coast	0.1%
Sunshine Coast	-1%
Toowoomba	-5%
Townsville	16%
Cairns	13%
Logan - Beaudesert	-10%
Ipswich	7%
Moreton Bay	76%
Central Queensland	-6%
Darling Downs - Maranoa & Wide Bay	34%
Mackay - Isaac - Whitsunday	24%

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

Notes: *The total used to calculate this 91% share excludes enrolments unallocated to a region (representing 6% of total enrolments). (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.
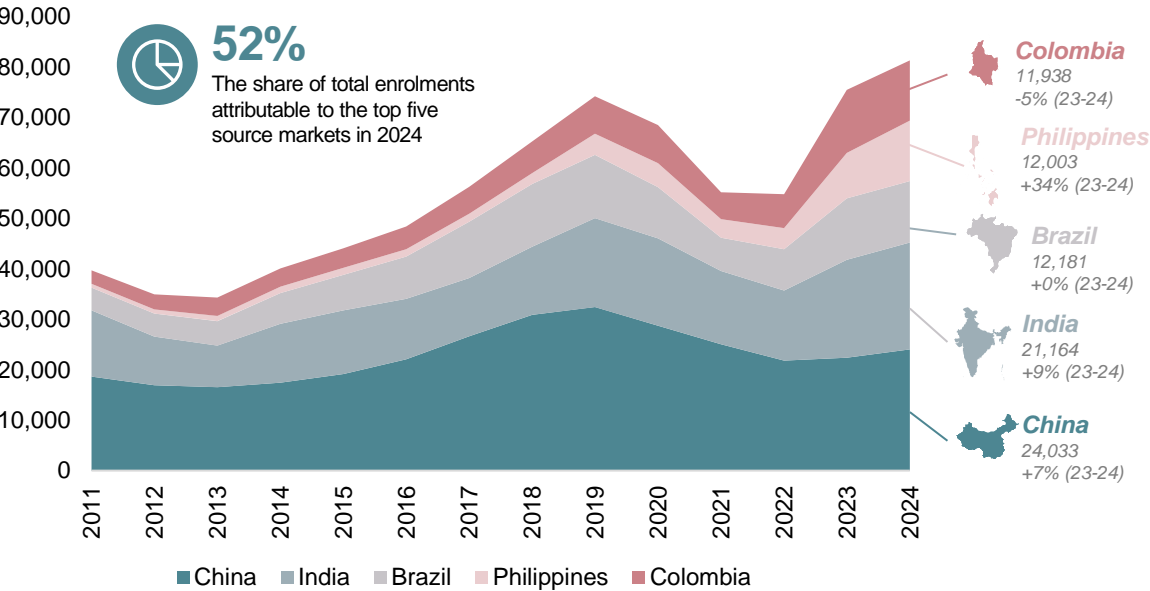
Enrolments by source market

As in 2023, China and India remained the largest source markets for international student enrolments in Queensland, continuing enrolment growth in 2024 (Table 2). Despite slowing from last year's rate, enrolments from India (9%) grew at a faster rate than those from China (7%). Brazil, the Philippines, and Colombia rounded out Queensland's top five enrolment source markets. Of these, the Philippines experienced the largest growth rate, overtaking Colombia for the first time and narrowly behind enrolments from Brazil.

Enrolments from the top five source markets made up 52% of all enrolments, 2% higher than in 2023 and similar to their enrolment share in 2022. This increase in concentration was largely driven by higher growth in Queensland's top three source markets.

Chart 3: Queensland enrolments in top five source markets, 2011-2024

52%
The share of total enrolments attributable to the top five source markets in 2024

Colombia
11,938
-5% (23-24)

Philippines
12,003
+34% (23-24)

Brazil
12,181
+0% (23-24)

India
21,164
+9% (23-24)

China
24,033
+7% (23-24)

Source: Australian Government Department of Education, international student enrolment data.
Enrolments in December of each year. Data as of May 2025 release.

Table 2: Enrolments in Queensland's top ten source markets, 2024

QLD rank	National rank	Source market	2024 QLD enrolments	2024 QLD market share	Growth in enrolments from 2023
1	1	China	24,033	15%	7%
2	2	India	21,164	13%	9%
3	8	Brazil	12,181	8%	0%
4	4	Philippines	12,003	8%	34%
5	5	Colombia	11,938	8%	-5%
6	3	Nepal	5,242	3%	3%
7	16	Japan	5,154	3%	6%
8	7	Thailand	4,769	3%	-9%
9	14	South Korea	4,356	3%	10%
10	18	Taiwan	4,307	3%	14%
		Other*	52,511	33%	7%
		Total	**157,658**	**100%**	

* Representing enrolments in the remaining 181 countries not shown.
Source: Australian Government Department of Education, international student enrolment data.
Enrolments in December of each year. Data as of May 2025 release.

Queensland's top ten enrolment source markets remained largely unchanged in 2024, with the same countries represented, albeit with some changes in rank compared with 2023. Most notably, Colombia fell from third to fifth after a 5% reduction in enrolments, Thailand fell by two to eighth place, and the Philippines rose from fifth to fourth after a third consecutive year of strong growth. Queensland has a higher share of enrolments from Japan, South Korea and Taiwan compared with the national average. All three of these countries rank in Queensland's top 10 source markets but do not appear nationally.

Source market concentration

Deloitte Access Economics measures the degree of enrolment source market concentration within a region using a concentration index.* More diverse sectors can make the region more resilient to shocks in the global market.

Queensland remains the most diverse IET sector in Australia, with a concentration index score of 669 in 2024 (Figure 1), a similar result to last year. Changes in market concentration varied across other jurisdictions, from New South Wales becoming less diverse (by 54 points), to Tasmania becoming more diverse (by 200 points).

As another measure of market concentration, Queensland's top five source markets represent 52% of all IET enrolments within the state, which is the lowest share across the country (Figure 2). This makes Queensland less reliant on its top five enrolment source markets than all other states and territories.

Figure 1: Source market concentration index by state and territory, 2024

Source market diversity

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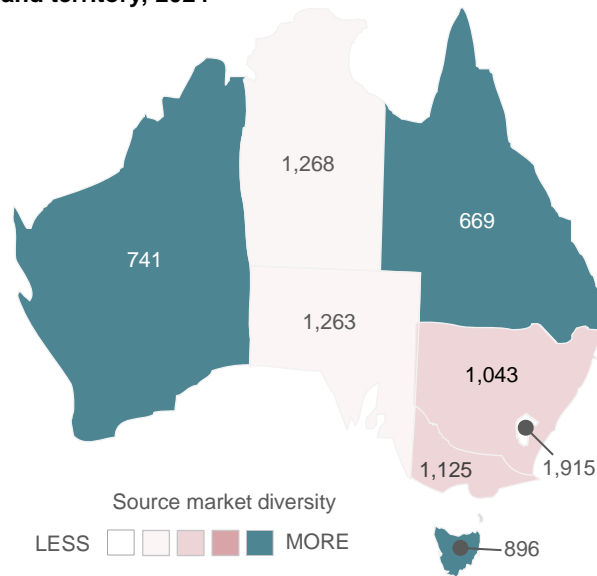
Source: Deloitte Access Economics

Figure 2: Proportion of enrolments from top 5 source markets by state, 2024

QLD	WA	NSW	TAS	VIC	SA	NT	ACT
52%	52%	57%	59%	60%	64%	70%	75%
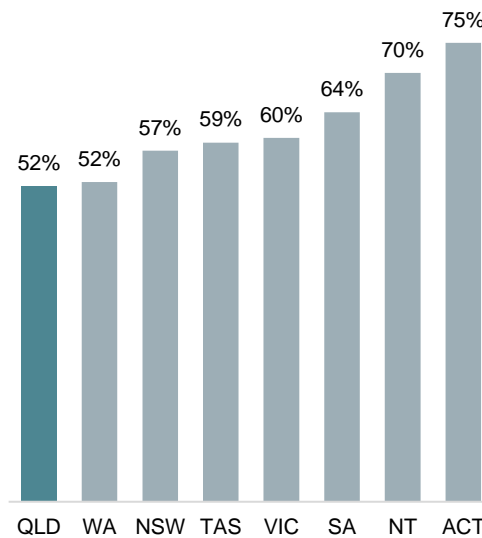
Source: Australian Government Department of Education. Data as of May 2025 release.

Regional concentration

Source market concentration varied significantly across Queensland's regions. Chart 4 displays the top 5 enrolment source markets and their concentration for selected Queensland regions. The size of the bubbles represents the size of each region by total enrolments.

In 2024, Ipswich and Logan - Beaudesert were the most concentrated regions, with 76% and 73% of IET enrolments from their top five source markets, respectively. The Sunshine Coast, Cairns, Gold Coast and Townsville derived less than 50% of their enrolments from their top five source markets, making them the most diverse markets in the state.

Chart 4: Cumulative enrolment market share of top five source markets, by region, 2024

Source: Australian Government Department of Education, international student enrolment data by ABS SA4. Enrolments for the smallest regions (including Central Queensland, Darling Downs - Maranoa & Wide Bay, Mackay - Isaac - Whitsunday, and Moreton Bay) are only available in a combined "Other Queensland Regions" category and are reported accordingly.
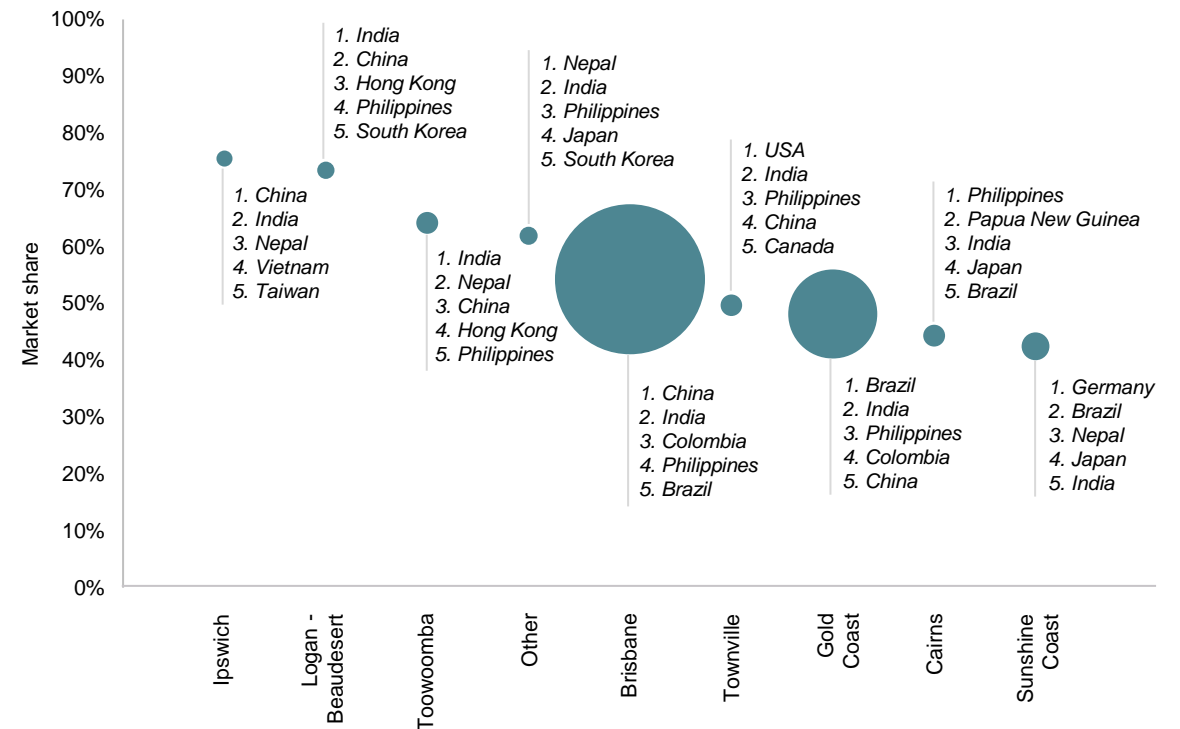
Note: *This index is calculated using a Herfindahl-Hirschman Index approach. This is a commonly used approach for measuring concentration and diversity (in any setting), and here is defined as the sum of squares of the source market shares (percentages) of enrolments. The index range from 0 to 10,000, where a lower index value is more diverse, whereas a higher index value is less diverse.

7

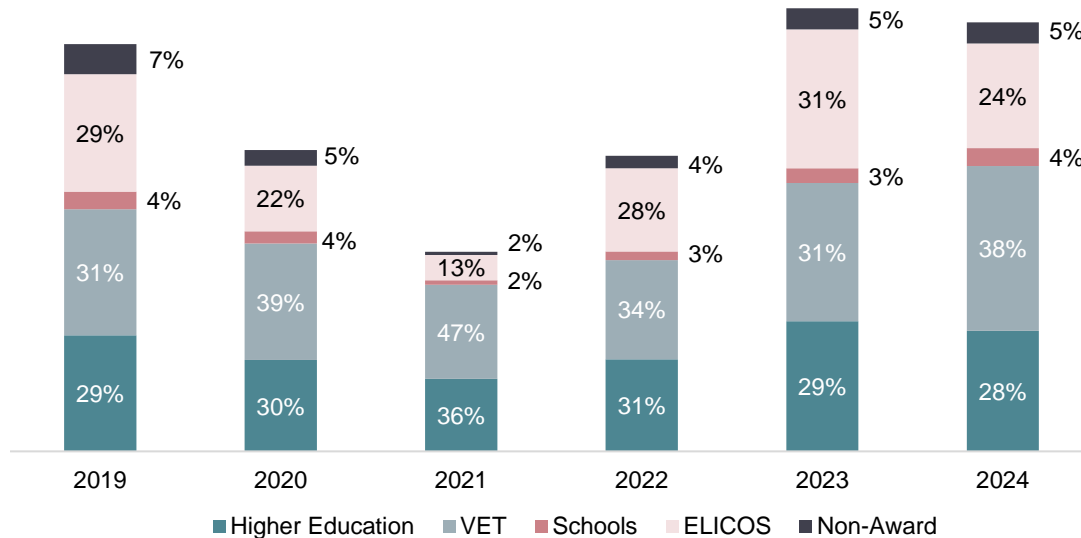## International student commencements

87,026
commencements in 2024

In 2024, Queensland's IET commencements totalled 87,026 – down by 3% from 2023. This represented 15% of all Australian commencements (16% in 2023), and 55% of total Queensland enrolments (61% in 2023). While the growth in enrolments this year was largely due to continuing students, new student commencements have softened, reflecting moderating demand.

The reduction in commencements was largely driven by a decline in ELICOS (-25%) and Higher Education (-7%). Commencements increased for the VET and Schools subsectors, up 19% and 21% respectively from the previous year.

The composition of international student commencements across subsectors shifted notably in 2024, with the share of ELICOS commencements falling by 7 percentage points and a corresponding rise in the share of VET commencements (Chart 5). The share of commencements across other subsectors, including Higher Education, remained relatively stable.
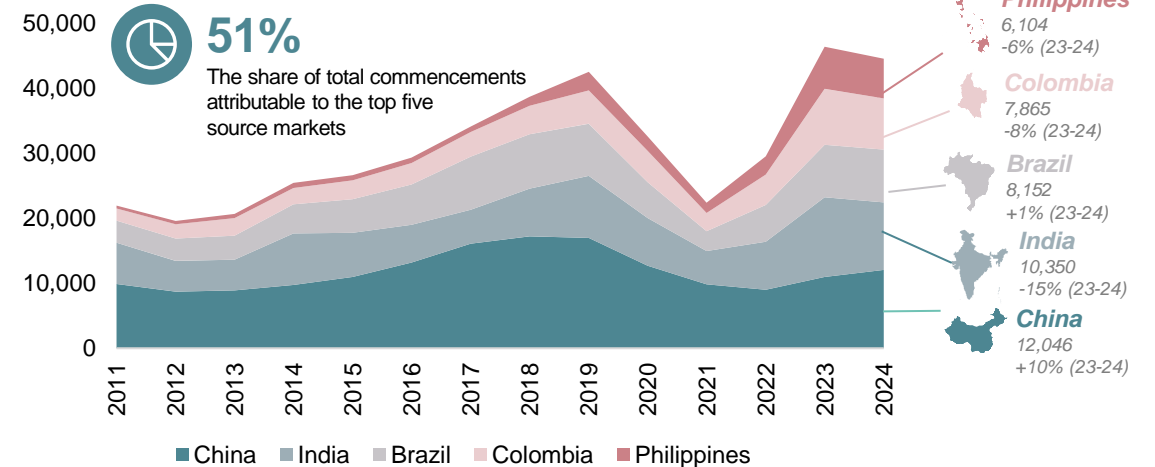
Chart 5: Commencements by subsector, 2019-2024

Source: Australian Government Department of Education, international student commencement data. Commencements in December of each year. Data as of May 2025 release.

Commencements by source market

Chart 6: Queensland commencements in top five source markets, 2011-2024

51%
The share of total commencements attributable to the top five source markets

Philippines
6,104
-6% (23-24)

Colombia
7,865
-8% (23-24)

Brazil
8,152
+1% (23-24)

India
10,350
-15% (23-24)

China
12,046
+10% (23-24)

Source: Australian Government Department of Education, international student commencement data. Commencements in December of each year. Data as of May 2025 release.

As in 2023, Queensland's top five commencement source markets were China, India, Brazil, Colombia and the Philippines. Together, these accounted for 51% of the state's IET commencements in 2024 (Chart 6).

China reclaimed its position as Queensland's largest source of commencements in 2024, overtaking India with a 10% growth rate after falling behind in 2023. In contrast, India saw a 15% decline, following its sharp rise to 12,228 commencements the previous year.

Growth across the remaining top source markets was mixed, reflecting a return to more typical patterns. Brazil recorded a marginal increase (1%), while Colombia and the Philippines declined by 8% and 6% respectively. This softer or negative growth follows a period of exceptional recovery between 2022 and 2023, when Colombia surged by 83%, Brazil by 44%, and the Philippines by 131%. Notably, Brazil regained its place as the third-largest source market, after briefly falling behind Colombia in 2023.

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).^
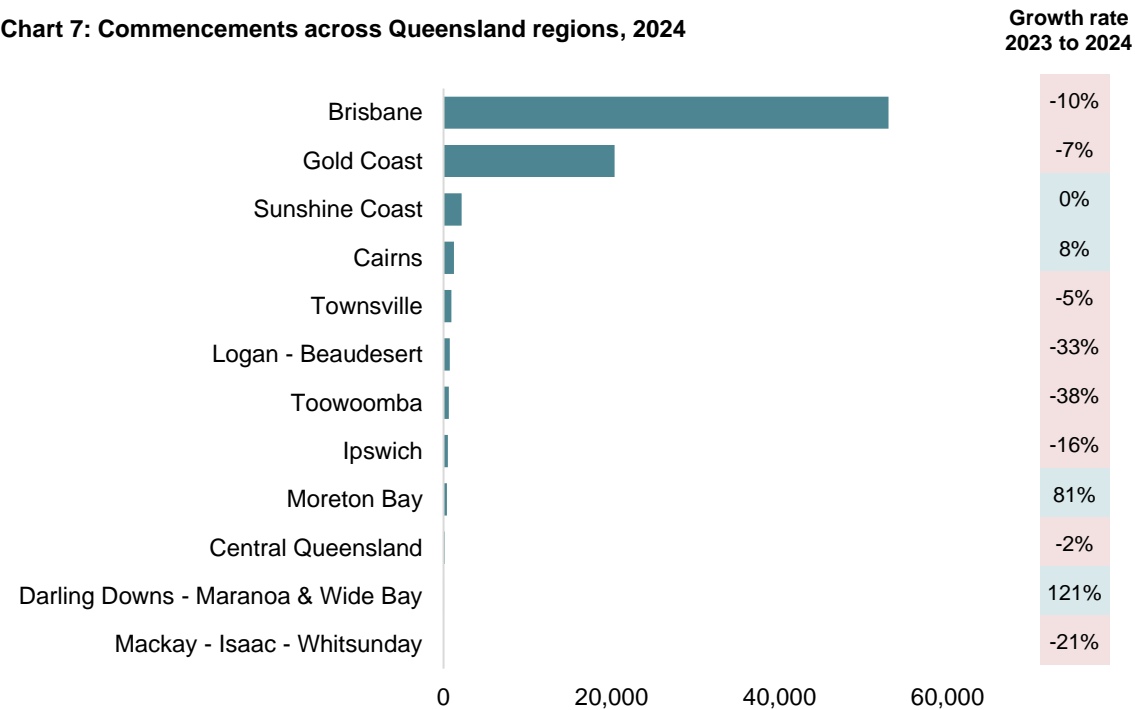
^ Refer to Chart 10 on page 10.

Commencements by region

The decrease in commencements from 2023 to 2024 was driven by a decline in 8 of 12 Queensland regions (Chart 7). However, this followed significant growth in the previous year. For instance, commencements in Logan - Beaudesert and Mackay - Isaac - Whitsunday more than doubled between 2022 and 2023, before declining by 33% and 21%, respectively, over the subsequent twelve months. Toowoomba (-38%), Ipswich (-16%), and Brisbane (-10%) were the other regions that experienced the largest falls over the past year.

Darling Downs - Maranoa & Wide Bay experienced significant growth of 121% in 2024, despite falling in 2023, while Moreton Bay had the second highest growth of the Queensland regions at 81%.
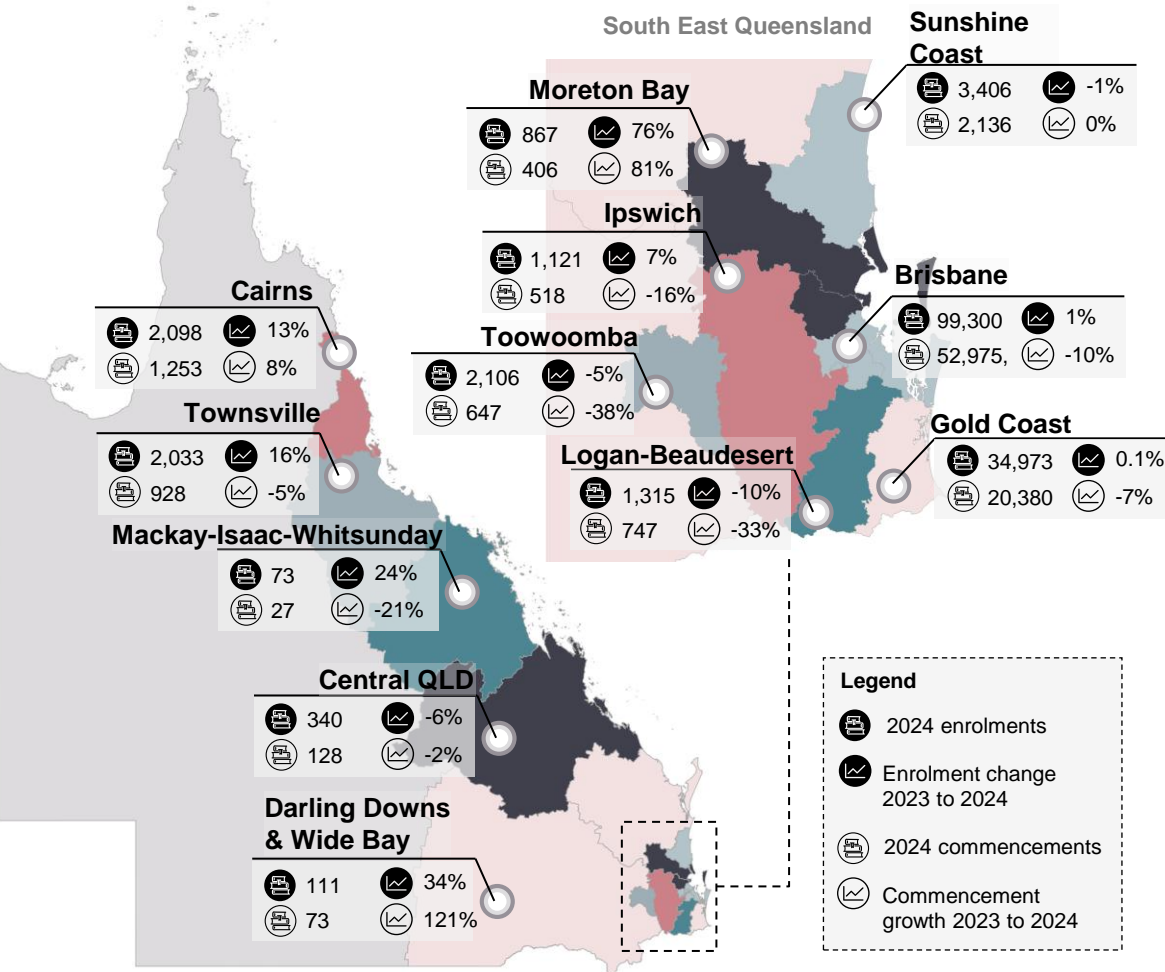
Chart 7: Commencements across Queensland regions, 2024

Growth rate 2023 to 2024

Region		Growth rate 2023 to 2024
Brisbane		-10%
Gold Coast		-7%
Sunshine Coast		0%
Cairns		8%
Townsville		-5%
Logan - Beaudesert		-33%
Toowoomba		-38%
Ipswich		-16%
Moreton Bay		81%
Central Queensland		-2%
Darling Downs - Maranoa & Wide Bay		121%
Mackay - Isaac - Whitsunday		-21%

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

Regional enrolments and commencements summary

Figure 3: IET total enrolments and commencements by region, 2024

South East Queensland

Sunshine Coast
- 2024 enrolments: 3,406 | Enrolment change: -1%
- 2024 commencements: 2,136 | Commencement growth: 0%

Moreton Bay
- 2024 enrolments: 867 | Enrolment change: 76%
- 2024 commencements: 406 | Commencement growth: 81%

Ipswich
- 2024 enrolments: 1,121 | Enrolment change: 7%
- 2024 commencements: 518 | Commencement growth: -16%

Brisbane
- 2024 enrolments: 99,300 | Enrolment change: 1%
- 2024 commencements: 52,975, | Commencement growth: -10%

Cairns
- 2024 enrolments: 2,098 | Enrolment change: 13%
- 2024 commencements: 1,253 | Commencement growth: 8%

Toowoomba
- 2024 enrolments: 2,106 | Enrolment change: -5%
- 2024 commencements: 647 | Commencement growth: -38%

Townsville
- 2024 enrolments: 2,033 | Enrolment change: 16%
- 2024 commencements: 928 | Commencement growth: -5%

Logan-Beaudesert
- 2024 enrolments: 1,315 | Enrolment change: -10%
- 2024 commencements: 747 | Commencement growth: -33%

Gold Coast
- 2024 enrolments: 34,973 | Enrolment change: 0.1%
- 2024 commencements: 20,380 | Commencement growth: -7%

Mackay-Isaac-Whitsunday
- 2024 enrolments: 73 | Enrolment change: 24%
- 2024 commencements: 27 | Commencement growth: -21%

Central QLD
- 2024 enrolments: 340 | Enrolment change: -6%
- 2024 commencements: 128 | Commencement growth: -2%

Darling Downs & Wide Bay
- 2024 enrolments: 111 | Enrolment change: 34%
- 2024 commencements: 73 | Commencement growth: 121%

Legend
- 2024 enrolments
- Enrolment change 2023 to 2024
- 2024 commencements
- Commencement growth 2023 to 2024

Source: Australian Government Department of Education, international student enrolment and commencement data by ABS SA4. Data as of May 2025 release. Results may not sum to values listed elsewhere due to 9,915 Queensland enrolments unallocated to a specific region.
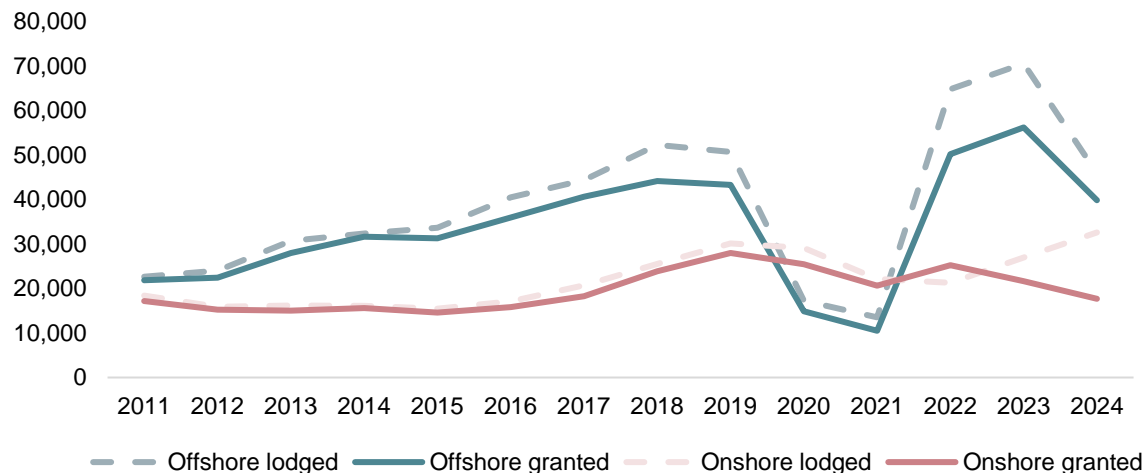
Visas lodged and granted

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

The total number of lodged and granted student visas declined in 2024, following a period of sharp growth between 2021 and 2023. This marks a clear realignment with longer-term growth trends and signals a cooling in the international education pipeline (Chart 8). Given their role as a lead indicator, this fall suggests a moderation in future growth after the unprecedented increase in 2023.

The gap between lodged and granted visas has also widened further in recent years. Total student visas lodged fell to 78,391 in 2024, 20% below the 2023 rate. Grants declined even more sharply, down 26% to 57,530. As a result, the state's grant rate dropped to 73%, its lowest point on record, and significantly below the 87–88% range observed consistently between 2018 and 2022.[1] This downward trend is consistent with the tightening national policy landscape described on pg.4 and is consistent with national trends.

Chart 8: Queensland student visas lodged and granted by location, 2011-2024

Source: Department of Home Affairs: Student Visa Program. Primary applicant visas. Data as of April 2025.

[1] This rate is calculated as total visas granted divided by total visas lodged.

Queensland continues to be the third largest Australian destination for international student visas. It has followed a similar trend to the other major east coast states since COVID-19, with a slightly larger fall in visas granted in 2024 (-26%), compared with New South Wales and Victoria (-22% respectively). The Australian Capital Territory has been the most resilient, with visas granted falling by 14% over the past year (Chart 9).
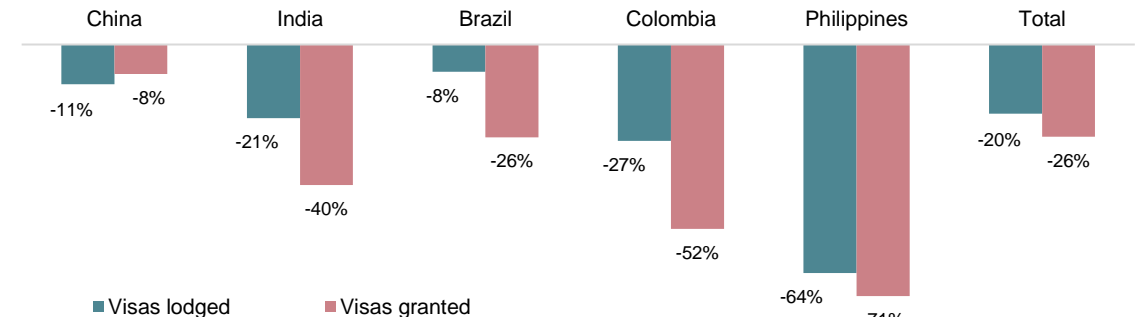
Chart 9: Visas granted across Australian jurisdictions, 2011-2024
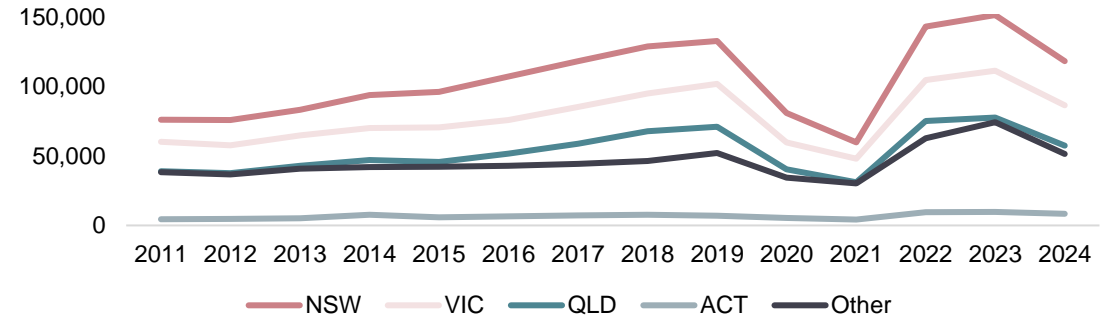
Source: Department of Home Affairs: Student Visa Program. Primary applicant visas. Data as of April 2025.

Growth in visas lodged and granted from 2023 to 2024 has significantly declined from previous years in Queensland's top five enrolment source markets, reflecting changes in the national policy landscape (Chart 10). As in previous years, commencements are generally higher than the number of visas granted, suggesting a return of students on visas granted in previous years.

Chart 10: Growth rates in Queensland student visas lodged and visas granted from 2023 to 2024 in the top five enrolment source markets


Source: Department of Home Affairs: Student Visa Program. Primary applicant visas. Data as of April 2025.

CRICOS providers

In 2024, there were **368 unique CRICOS education providers operating in Queensland*** - five more than in 2023. However, the number of providers operating in each region varied noticeably between 2023 and 2024 (Chart 11).

Chart 11: Growth in unique providers operating in Queensland regions between 2023 and 2024
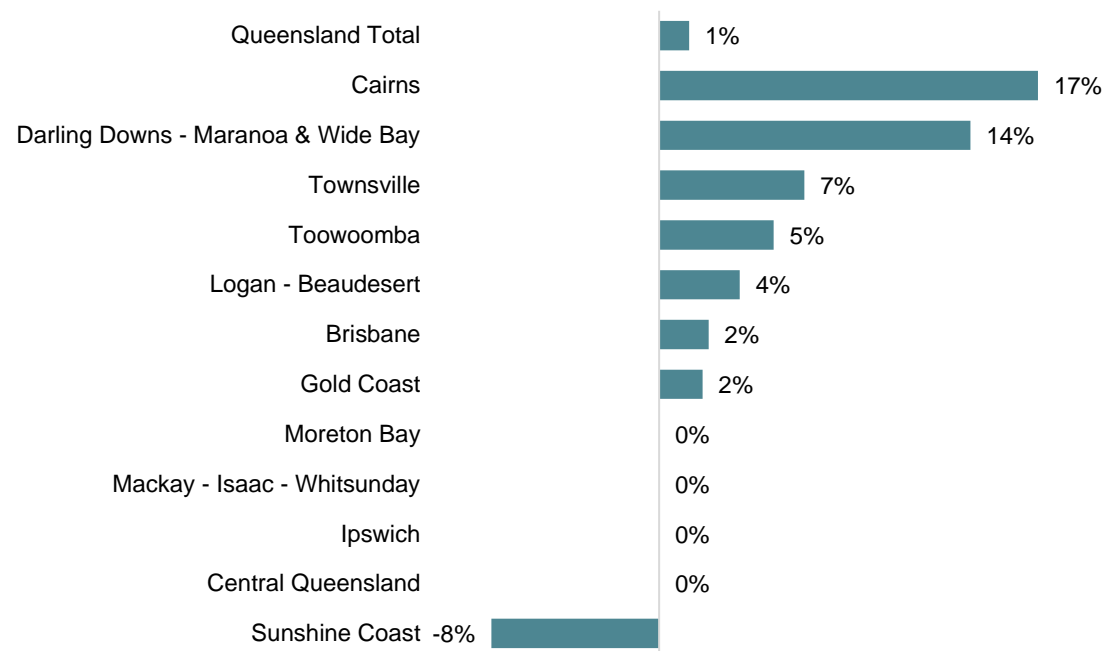

Source: Deloitte Access Economics estimates using Australian Government Department of Education data as of December 2024.

It is estimated that these providers offered 7,267 courses statewide, down 1% from 2023 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 (-2%). However, there were more notable reductions in the number of courses offered in regional centres such as Mackay - Isaac - Whitsunday (-19%), the Sunshine Coast (-13%), and Central Queensland (-8%).

CRICOS courses offered in Queensland are relatively diverse by level of qualifications, with Diplomas (29% of total), Certificates (24%), and Bachelors (18%) all forming major categories (Chart 12).

Chart 12: Queensland CRICOS courses by qualification type, 2024
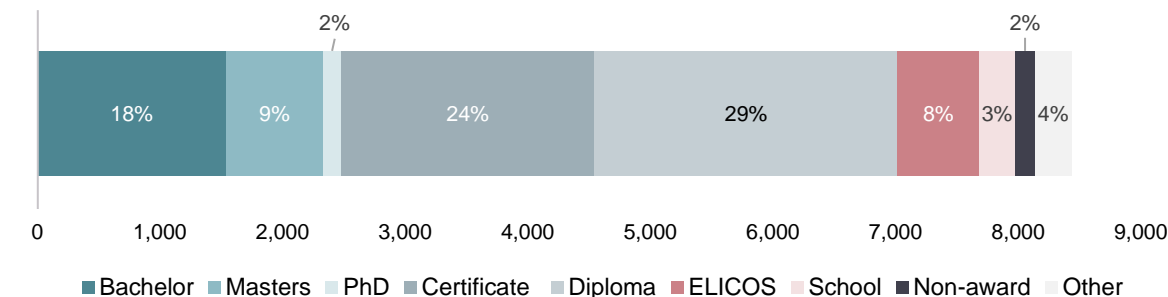
Source: Australian Government Department of Education. Data as of December 2024

In 2024, Higher Education providers accounted for 44% of all courses in Queensland (+2% from 2023), followed by VET (41%) (Table 3). Queensland had the highest proportion of ELICOS courses (8%) and tied as the second highest proportion of VET courses with Tasmania (41%).

Table 3: Share of CRICOS courses by sector across jurisdictions, 2024

	QLD	NSW	VIC	SA	WA	ACT	TAS	NT
HE	44%	51%	49%	57%	51%	64%	49%	40%
VET	41%	39%	40%	24%	33%	24%	41%	50%
ELICOS	8%	6%	6%	3%	4%	2%	3%	6%
School	6%	2%	3%	12%	10%	8%	6%	2%
Non-award	2%	2%	2%	4%	2%	2%	1%	2%

Source: Australian Government Department of Education. Data as of 1 December 2024.

Export revenue

$6.89bn
export revenue from onshore and offshore students and visiting friends and relatives

Queensland's IET sector export revenue totalled **$6.89 billion in 2024*,** which accounted for 41% of Queensland's services exports (down from 50% in 2022 and 46% in 2023). The Higher Education sector made the largest contribution to export revenue (63%), followed by VET (24%), ELICOS (6%), Schools (5%) and Non-Award (2%) (Chart 14).

↑ 1%

Queensland's IET export revenue increased by 1% between 2023 and 2024 but was 23% higher than pre-pandemic levels ($5.60 billion in 2019). This was driven by a significant increase in the Schools s u b sector (20%), and smaller growth in the Higher Education (5%) and VET s u b sectors (2%) (Chart 13). The ELICOS subsector experienced a notable decrease in export revenue growth, down by 36%, followed by a modest reduction in the Non-Award s u b sector by 7%, which has dampened overall growth, consistent with national trends.

Chart 13: IET export revenue by subsector, 2019, 2023-2024
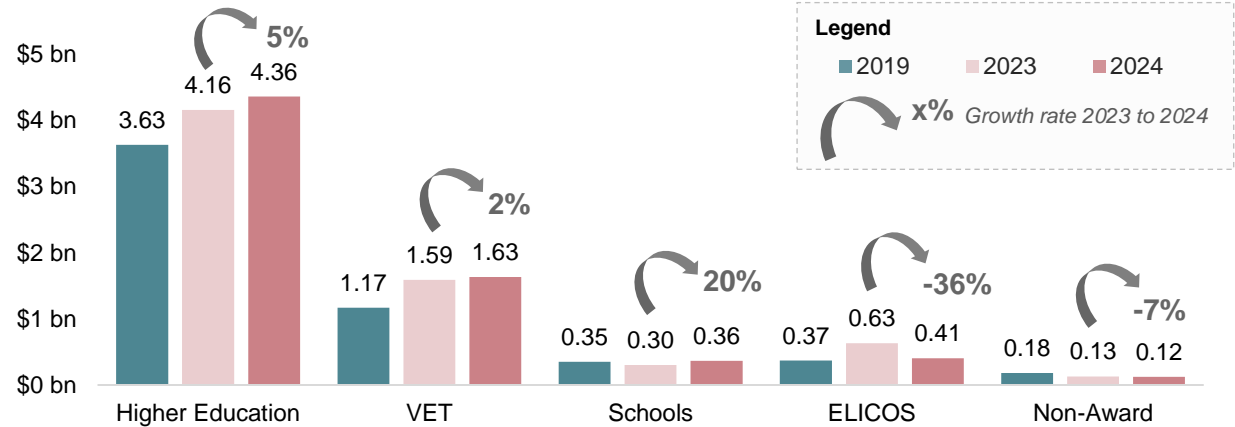
Legend
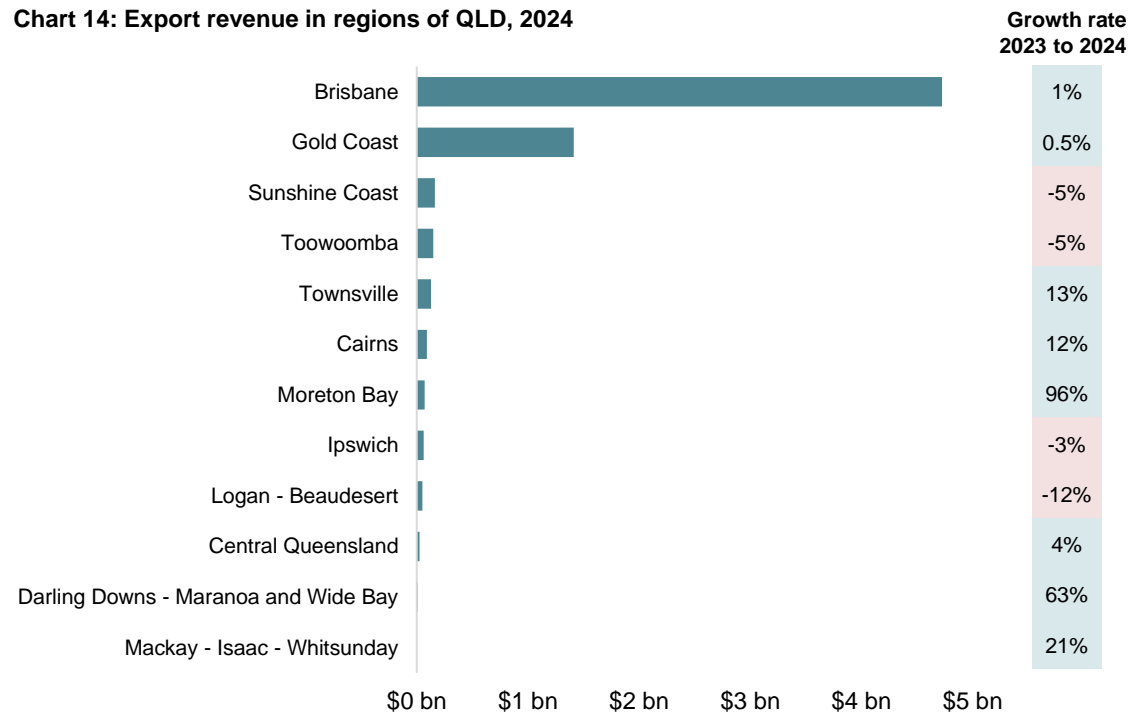■ 2019 ■ 2023 ■ 2024

x% *Growth rate 2023 to 2024*

Source: Deloitte Access Economics estimates using data from the Australian Bureau of Statistics, Australian Government Department of Education, and Tourism Research Australia.

Regional breakdown

As in 2023, **Brisbane and the Gold Coast** remained the two largest regions of the Queensland IET sector, accounting for **89% of IET export revenue** in 2024 (Chart 14).

Export revenue grew in 8 of 12 regions in 2024, though growth rates varied widely. Moreton Bay and Darling Downs - Maranoa & Wide Bay saw the strongest increases, up 96% and 63%, respectively. Growth in the two largest regions, Brisbane and the Gold Coast, was modest at 0.4%. Four regions recorded declines, including Logan – Beaudesert, which fell 12% after strong growth in 2023.

Chart 14: Export revenue in regions of QLD, 2024

Growth rate 2023 to 2024

Region	Growth rate 2023 to 2024
Brisbane	1%
Gold Coast	0.5%
Sunshine Coast	-5%
Toowoomba	-5%
Townsville	13%
Cairns	12%
Moreton Bay	96%
Ipswich	-3%
Logan - Beaudesert	-12%
Central Queensland	4%
Darling Downs - Maranoa and Wide Bay	63%
Mackay - Isaac - Whitsunday	21%

Source: Deloitte Access Economics estimates using data from the Australian Bureau of Statistics, Australian Government Department of Education, and Tourism Research Australia.

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

Onshore student export revenue

$6.85bn
in onshore export revenue in 2024

Onshore student export revenue (i.e. expenditure on goods and services and onshore tuition fees) totalled **$6.85 billion in 2024** - reflecting a **2% increase on 2023 levels** (Table 4). While total enrolments grew by 7%, and onshore tuition fees by 19%, expenditure on goods and services (the largest component of export revenue) decreased by 7% between 2023 and 2024. This is broadly consistent with the 3% decrease in goods and services spending at the national level

Following a disproportionate rise in goods and services spending by international students in Queensland of 94% from 2022 and 2023, these trends represent a return to the approximate split of 59% goods and services spending and 41% tuition fees observed in 2022 (Chart 15).

Apart from this rise in education services (tuition fees) compared with other goods and services spending, the composition of onshore student expenditure across industries remained largely unchanged since 2023. Onshore students continued to spend almost two-thirds (66%) of their expenditure on education and accommodation services (Figure 4).

Figure 4: Onshore student export revenue by goods and services, 2024

| Education services 41% | Accommodation services 25% | Food, alcohol and other beverage products 10% | Takeaway and restaurant meals 9% | Shopping, gifts and souvenirs 6% | All other goods and services 9% |

Source: Deloitte Access Economics estimates using data from the Australian Bureau of Statistics and Tourism Research Australia.

Table 4: Onshore student export revenue, 2023-2024

|	2023 onshore export revenue ($bn)	2024 onshore export revenue ($bn)	Growth (%)
Goods and services	$4.39	$4.09	-7%
Tuition fees	$2.32	$2.76	19%
Total	**$6.71**	**$6.85**	**2%**

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

Chart 15: Onshore student export revenue by expenditure category, 2023 and 2024
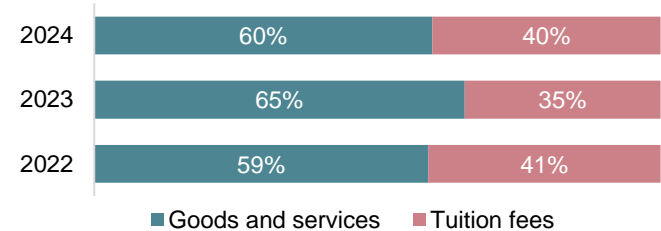
	Goods and services	Tuition fees
2024	60%	40%
2023	65%	35%
2022	59%	41%

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

Offshore student export revenue

$38.0m
in offshore export revenue in 2024

Estimated offshore student expenditure (i.e. offshore tuition fees) totalled $38 million in 2024, 60% lower than in 2023. This drop in offshore export revenue largely reflects changes in student location, as a greater proportion of international students returned onshore in 2024. Further, this shift reflects the change in the composition of onshore and offshore tuition fees, with only 1% of tuition fees incurred offshore in 2024, approximately 3 percentage points lower than 2023 levels (Chart 16).

Chart 16: Tuition fee export revenue by student location, 2024
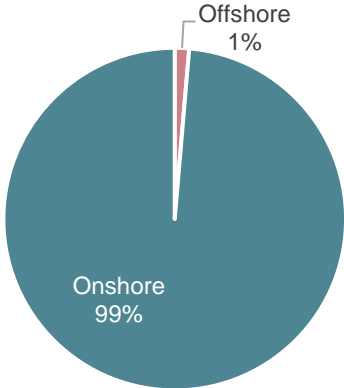
Offshore 1%
Onshore 99%

Source: Deloitte Access Economics estimates using data from the Australian Bureau of Statistics, Australian Government Department of Education and the Australian Government Department of Home Affairs.

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.

Visiting friends and relatives

$4.5m*
in export revenue from visiting friends and relatives in 2024

Tourism Research Australia data indicates that in 2024, 7,100 visitors stayed for approximately 51,000 nights for the purpose of visiting an international student relative or friend in Queensland. Total visitors and visitor nights fell 49% and 77%, respectively, from post-COVID highs in 2023.

Export revenue from international students visiting friends and relatives (VFR) was estimated at **$4.5 million in 2024, marking an 82% fall from 2023 levels**. This decline followed a sharp **rebound of 715% from $3 million in 2022 to $24.7 million in 2023**. While VFR-related spending in 2024 is still 67% higher than 2022 levels, it remains less than 5% of pre-pandemic levels, which stood at $92.2 million in 2019 (Chart 17).

Chart 17: QLD IET VFR export revenue, 2019, 2023-2024 ($m)
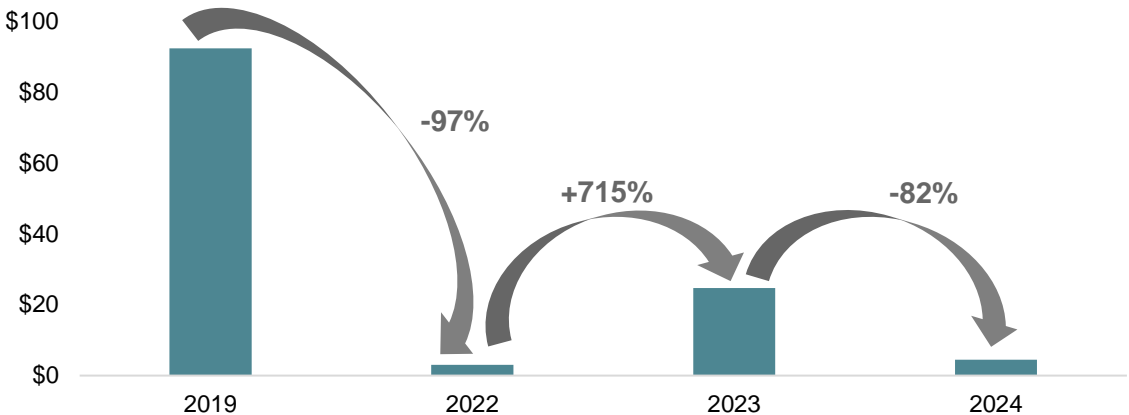
Source: Deloitte Access Economics using data from Tourism Research Australia.

There has been a significant decline visitor nights per enrolment (-80%) and average spend per night (-22%) (Chart 18); however, average spend per night is still 14% higher than in 2022. This decline after a surge in 2023 may reflect persistent global economic and geopolitical uncertainty, as well as continued uncertainty and disruption in visa policy settings.

Chart 18: Visitor nights per enrolment (left) and average spend per night (right), 2019, 2023-2024
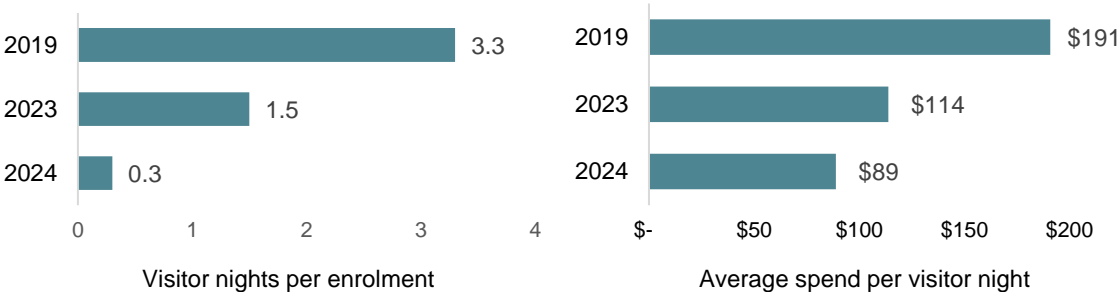
Visitor nights per enrolment

Average spend per visitor night

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

Food and drink accounts for the largest proportion of VFR expenditure, followed by retail trade, accommodation, and education and training (Chart 19). As the estimated regional allocation is based on enrolment share, most spending is concentrated in Brisbane and the Gold Coast.

Chart 19: VFR export revenue by industry (left) and region (right), 2024
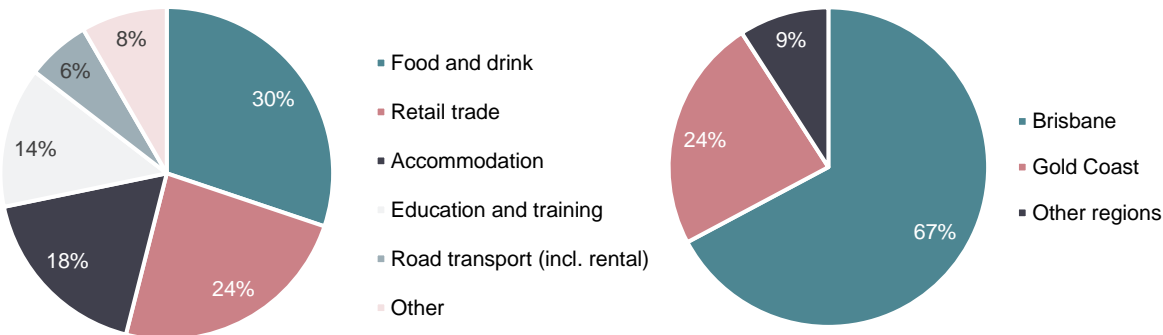
Source: Deloitte Access Economics estimates using data from Tourism Research Australia and the Australian Government Department of Education.

*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.

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 **$2.76 billion** to the Queensland economy and supported **15,443 full-time equivalent (FTE)** jobs in 2024 (Table 5).

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

	2023 value-added ($bn)	2024 value-added ($bn)	Growth in value-added	2023 jobs (FTE)	2024 jobs (FTE)	Growth in jobs
Onshore students	$2.78	$2.74	-1%	17,585	15.412	-12%
Offshore students	$0.05	$0.02	-57%	42	18	-57%
VFR*	$0.01	$0.001	-83%	82	13	-84%
IET sector	**$2.83**	**$2.76**	**-3%**	**17,709**	**15,443**	**-13%**

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 **$1.97 billion** and supported **10,597 FTE** jobs to Queensland in 2024 (Table 6).

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

	2023 value-added ($bn)	2024 value-added ($bn)	Growth in value-added	2023 jobs (FTE)	2024 jobs (FTE)	Growth in jobs
Onshore students	$2.08	$1.96	-6%	11,849	10,549	-11%
Offshore students	$0.02	$0.01	-57%	98	41	-58%
VFRs	$0.01	$0.001	-84%	50	8	-85%
IET sector	**$2.11**	**$1.97**	**-6%**	**11,997**	**10,597**	**-12%**

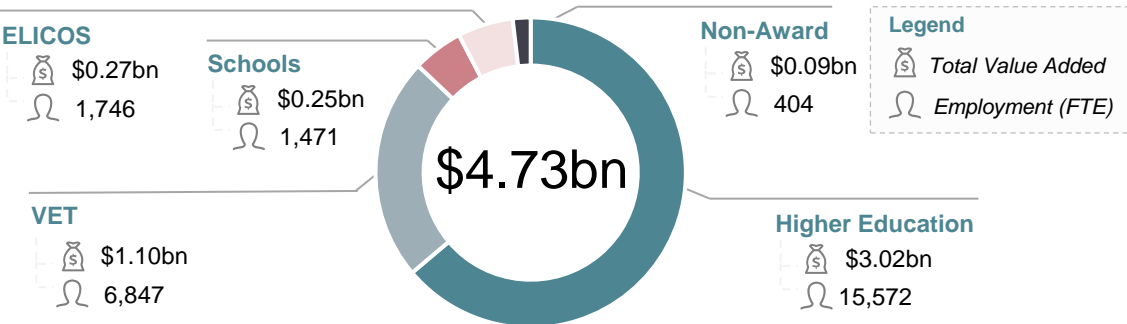Source: Deloitte Access Economics estimates.

Total economic contribution

$4.73bn
value added contributed to the Queensland economy by the IET sector in 2024

In total, the IET sector contributed **$4.73 billion** to the Queensland economy and supported **26,040 full-time equivalent (FTE)** jobs in 2024 (Table 7). This represents a 4% decrease from 2023 to 2024 in terms of value added, and a drop of 12% in FTE employment. Notably, this contraction follows strong growth in 2023, which had lifted the sector's total economic contribution above pre-pandemic levels. The largest contribution to total IET industry value added was made by the **Higher Education** subsector, which contributed approximately 64% of the total value added in 2024 (Chart 20).

Chart 20: subsector contribution to total IET industry value added, 2024

ELICOS $0.27bn 1,746
Schools $0.25bn 1,471
Non-Award $0.09bn 404
VET $1.10bn 6,847
Higher Education $3.02bn 15,572
$4.73bn

Legend: Total Value Added, Employment (FTE)

Source: Deloitte Access Economics estimates.

Table 7: Total economic contribution of the IET sector, 2023-2024

	2023 value-added ($bn)	2024 value-added ($bn)	Growth in value-added	2023 jobs (FTE)	2024 jobs (FTE)	Growth in jobs
Onshore students	4.85	4.70	-3%	29,434	25,961	-12%
Offshore students	0.07	0.03	-57%	141	59	-58%
VFRs	0.02	0.003	-83%	132	21	-84%
IET sector	**4.94**	**4.73**	**-4%**	**29,707**	**26,040**	**-12%**

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.

Regional significance of IET

In 2024, it is estimated that the **IET sector directly contributed 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 1.0% of the State economy** (in terms of value added). These overall figures remain unchanged from 2023.

The sector makes a **broad contribution to both metropolitan and regional areas**. In 2024, the sector made the largest proportional contribution (direct and indirect) to **Moreton Bay**, where it accounted for 3.3% of the regional economy (almost double the 1.8% seen in 2023). Four other regions have a share above 1% including the Gold Coast, Ipswich, Logan – Beaudesert, and Brisbane (Chart 21).

Chart 21: Contribution of the IET sector to regional economies (total economic contribution), 2024

Source: Deloitte Access Economics estimates. Data for Gross Regional Product for 2024 is unavailable. Figures rely on 2023 values scaled by the growth in Queensland's State Product from 2023 to 2024 (obtained from the ABS).

Figure 5: IET total contribution to regional economies, 2024
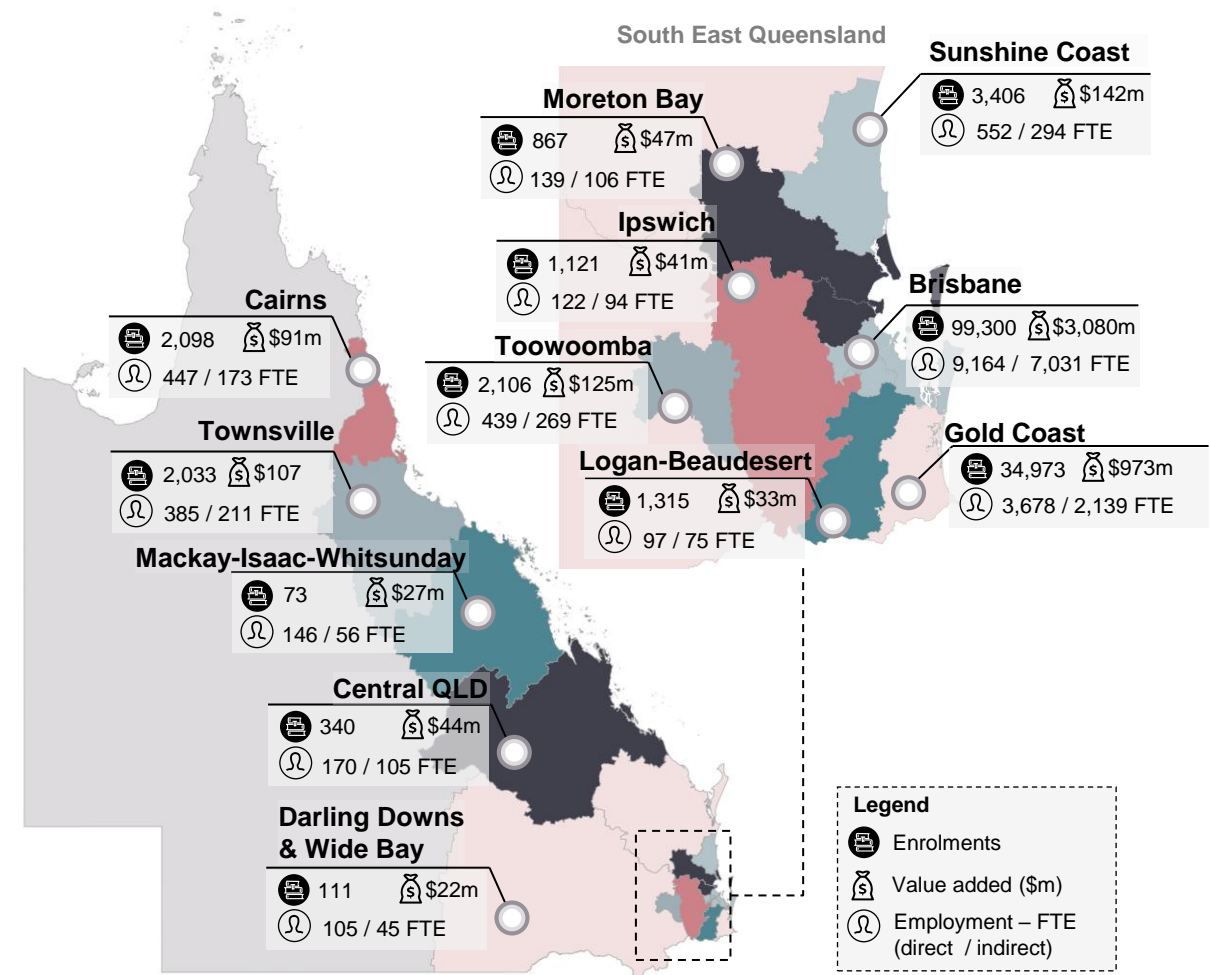
Source: Deloitte Access Economics estimates. Results may not sum to values listed elsewhere due to 9,915 Queensland enrolments unallocated to a specific region.

IET ecosystem

Key industries

In 2024, the expenditure of international students on various goods and services supported the direct employment of 15,443 FTE across a variety of industries, as shown in Table 8. More than half of this employment (56%) is in accommodation, and cafes, restaurants and takeaway food services.

Table 8: Direct employment breakdown by industry supported by international student spending, 2024

Tourism employment industry	Direct employment (FTE)	Share of total
Accommodation	5,973	39%
Cafes, restaurants and takeaway food services	2,621	17%
Retail trade	1,642	11%
Education and training	1,328	9%
Road transport and transport equipment rental	1,189	8%
Clubs, pubs, taverns and bars	832	5%
All other industries	709	5%
Other sports and recreation services	437	3%
Cultural services	228	1%
Air, water and other transport	193	1%
Casinos and other gambling services	168	1%
Rail transport	124	1%
Total	**15,443**	**100%**

Source: Deloitte Access Economics estimates. '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.

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 the latest data.^

^ English Australia, National ELICSO 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.*

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

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.
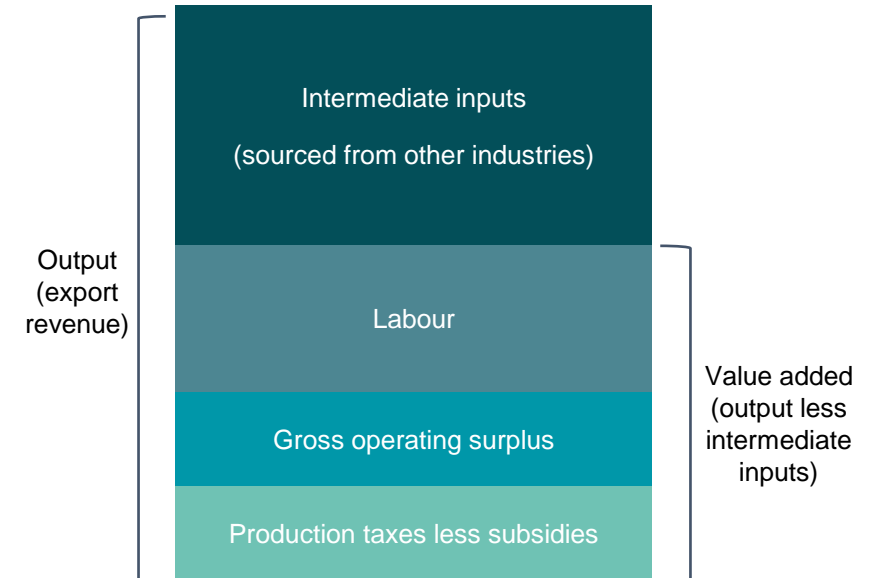
Economic contribution in the IET context

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 CY2024.

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^. 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

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.

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

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) Regional Tourism Satellite Account (RTSA) model. This input-output model is the most contemporary and sophisticated of its kind in Australia, and has 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.

Figure 7: Economic contribution modelling overview
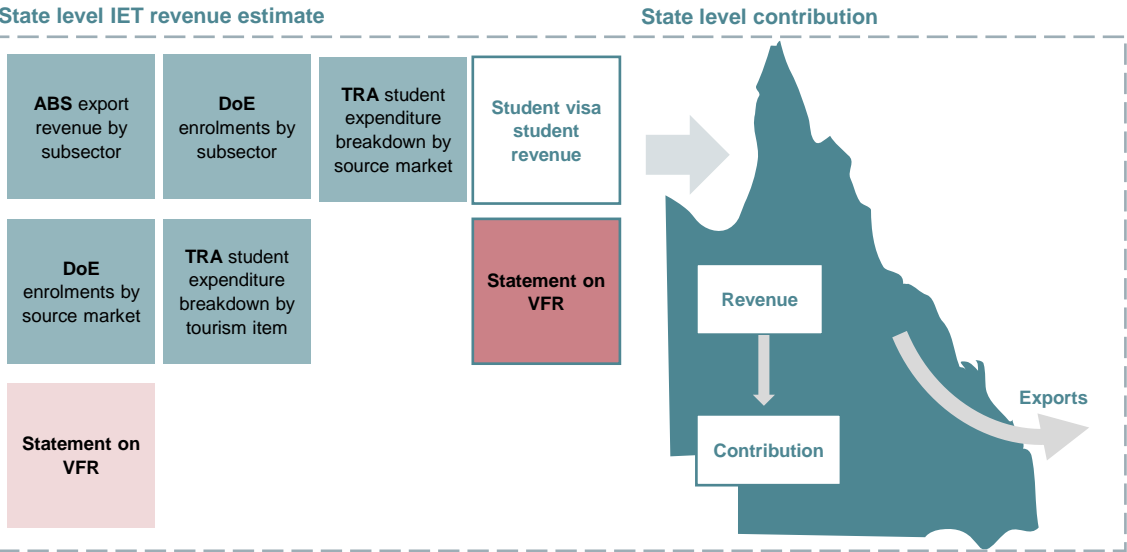
Source: Deloitte Access Economics

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^ (e.g. DoE enrolment and commencement data) while other data is published on an annual basis (e.g. ABS and TRA data).

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).

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, since 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).

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