International education & training snapshot:

Logan - Beaudesert 2024

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$33m — **Gross Value Added** to the Logan – Beaudesert economy by the IET sector in 2024
16% lower than 2023

172 — **Employment (FTE)** supported by the Logan – Beaudesert IET sector in 2024
23% lower than 2023

$50m — **Export revenue** generated through the Logan – Beaudesert IET sector in 2024
12% lower than 2023

1,315 — **International student enrolments** in 2024
10% lower than 2023

28 — **Providers** operating in Logan – Beaudesert as at December 2024
4% higher than 2023

International student enrolments and commencements

International student enrolments

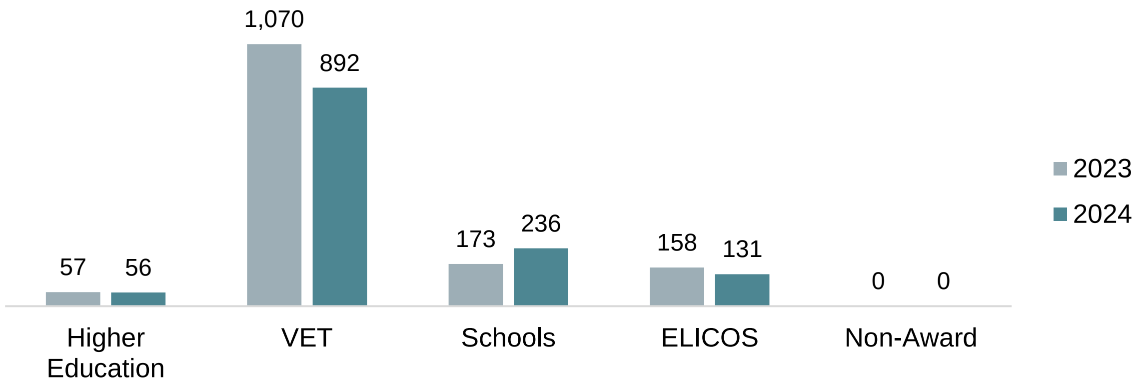
1,315
enrolments in 2024

In 2024, international student enrolments in Logan – Beaudesert totalled 1,315. As in 2023, **Vocational Education and Training (VET)** remained the largest subsector, with **892** enrolments, followed by the Schools and English Language Intensive Courses for Overseas Students (ELICOS) subsectors (Chart 1).

↓ 10%

Total international student enrolments in Logan – Beaudesert **decreased by 10%** compared with 2023 levels. This was driven by a decline in the HE (-2%), VET (-17%) and ELICOS (-17%) subsectors, despite growth in the Schools (36%) subsector.

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

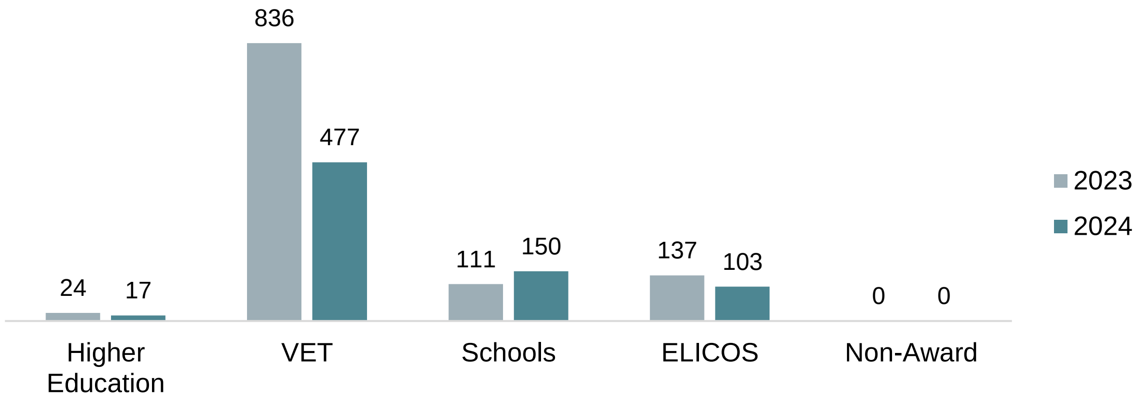
747
commencements in 2024

In 2024, international student commencements in Logan – Beaudesert **totalled 747**. As in 2023, VET remained the largest subsector, with **477** commencements, followed by the Schools and ELICOS subsectors (Chart 2).

↓ 33%

Total international student commencements in Logan – Beaudesert **decreased by 33%** compared with 2023 levels. This was driven by a decline in the HE (-29%), VET (-43%) and ELICOS (-25%) subsectors, despite growth in the Schools (35%) subsector.

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 Logan – Beaudesert continued to be **India and China,** which together accounted for **53%** of total enrolments in 2024 (Table 1). Within Logan – Beaudesert's top five enrolment source markets, China, Hong Kong, the Philippines and South Korea observed enrolment growth between 2023 and 2024, with the Philippines growing significantly by 65%.

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

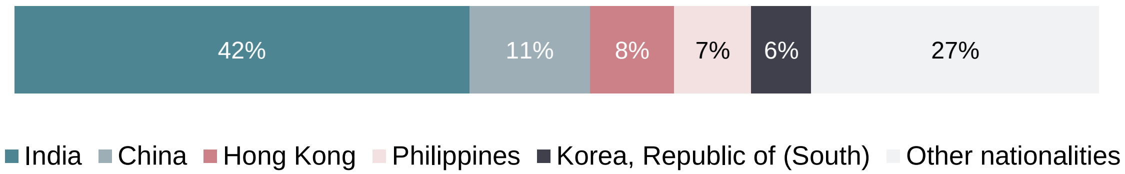
	2023		2024		
	Enrolments	Share	Enrolments	Share	Growth (share)
India	610	45%	553	42%	⬇
China	124	9%	147	11%	⬆
Hong Kong	91	7%	102	8%	⬆
Philippines	57	4%	94	7%	⬆
Korea, Republic of (South)	71	5%	73	6%	⬆

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

Source market concentration

Enrolments in Logan – Beaudesert's top five source markets accounted for **73% of the region's international student enrolments** in 2024 (Chart 3). Logan – Beaudesert's source market concentration is significantly higher 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
Society and Culture	283	22%	227	30%
Engineering and Related Technologies	243	18%	125	17%
Mixed Field Programmes	236	18%	150	20%
Architecture and Building	208	16%	75	10%
Management and Commerce	206	16%	108	14%
Other	139	11%	62	8%

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^

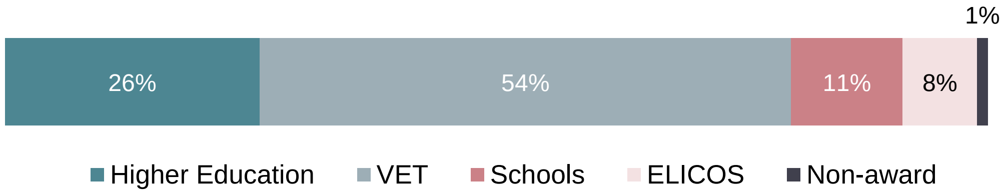
Table 3: CRICOS providers and courses between 2023 and 2024

	2023	2024	Growth
Providers	27	28	4%
Courses	193	185	-4%

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

Just over half of the courses offered in Logan – Beaudesert were in the VET subsector (Chart 4).

Chart 4: Share of CRICOS courses by IET subsectors in Logan – Beaudesert, 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

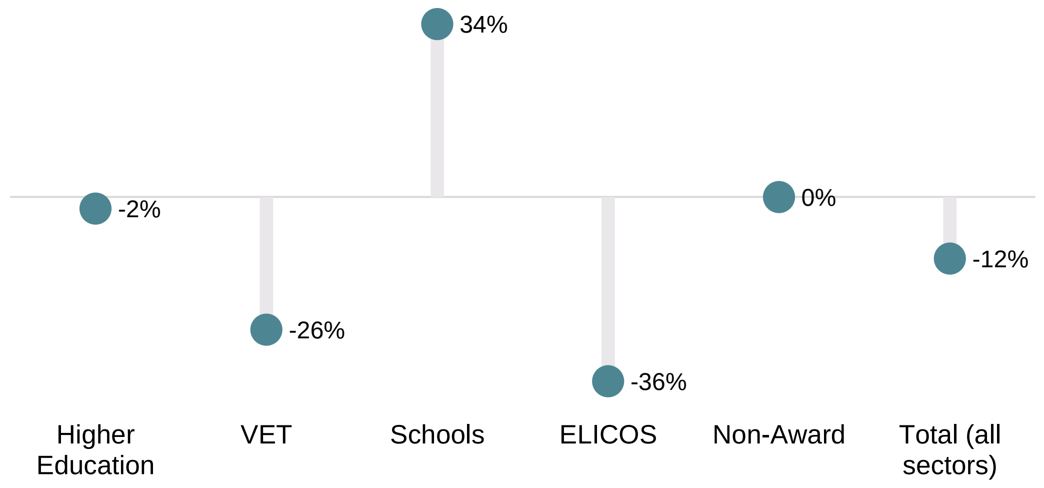
$50m
Export revenue in 2024

Total export revenue from international student expenditure on tuition fees, goods and services, and visiting friends and relatives (VFR) expenditure was **$50 million** in 2024, a decrease of 12% compared with 2023 (Chart 5). Onshore student expenditure accounted for 99% of Logan – Beaudesert's total export revenue, with the final 1% made up of offshore students and VFRs.

Logan – Beaudesert accounted for **1%** of Queensland's IET export revenue in 2024. The VET subsector made the largest contribution to IET export revenue in Logan – Beaudesert, contributing **$28 million**, or 56% towards IET export revenue.

Export revenue decreased across all IET subsectors except for the Schools subsector, which rose by 34%.

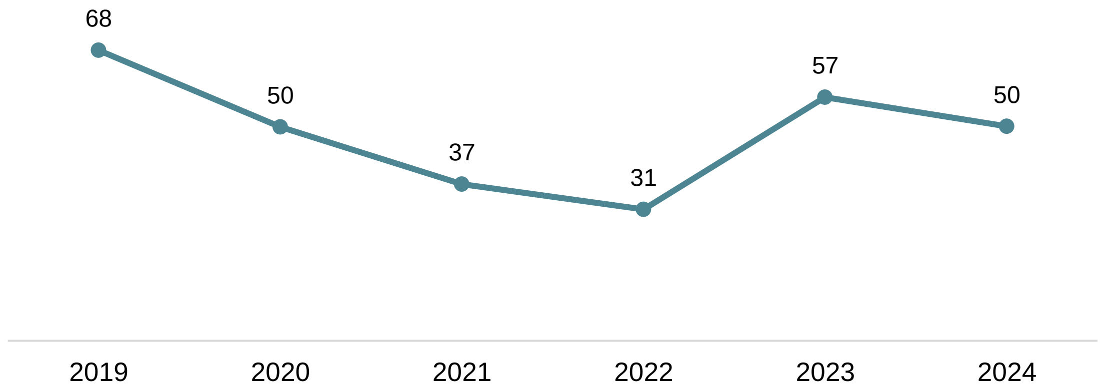
Chart 5: Export revenue growth by IET subsector between 2023 and 2024



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

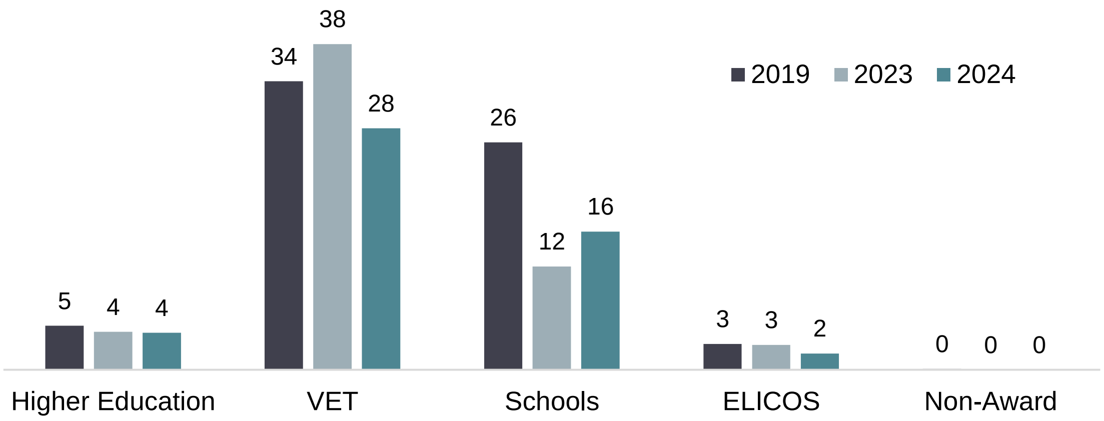
The Logan – Beaudesert region's IET export revenue decreased by 26% between 2019 and 2024 (Chart 6). Over the last five years, the IET export revenue has decreased across all subsectors, especially in the Schools subsector (-39%).

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

$33m
value added to the Logan – Beaudesert region by the IET sector in 2024

In total, the IET sector contributed **$33m million** and supported **172 full-time equivalent (FTE) jobs** in the Logan – Beaudesert region in 2024. This represents a decrease of **16%** in total value-added, and **23%** in employment from 2023.

Key industries

The expenditure of international students on various goods and services supports the direct employment of 97 FTE across a variety of industries as shown in Table 4. More than half of this employment (53%) is in accommodation, and cafes, restaurants and takeaway food services.

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

Employment tourism industry	Direct employment (FTE)	Share of total
Accommodation	35	36%
Cafes, restaurants and takeaway food services	17	17%
Retail trade	11	11%
Education and training	9	9%
Road transport and transport equipment rental	8	8%
Clubs, pubs, taverns and bars	5	5%
Other sports and recreation services	3	3%
Cultural services	2	2%
Air, water and other transport	1	1%
Casinos and other gambling services	1	1%
Rail transport	1	<1%
All other industries	5	5%
Total	**97**	**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 **$19 million** and supported **97 FTE** jobs in the Logan – Beaudesert 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	$22	$19	-14%	127	97	-24%
Offshore students	$0.4	$0.1	-62%	0.3	0.1	-63%
VFRs	$0.1	$0.01	-85%	1	0.1	-86%
IET sector	**$22**	**$19**	**-15%**	**128**	**97**	**-24%**

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 **$14 million** and supported **75 FTE** jobs in the Logan – Beaudesert 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	$17	$14	-17%	95	74	-22%
Offshore students	$0.2	$0.1	-62%	1	0.3	-64%
VFRs	$0.1	$0.01	-86%	0.4	0.1	-86%
IET sector	**$17**	**$14**	**-18%**	**97**	**75**	**-23%**

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.***

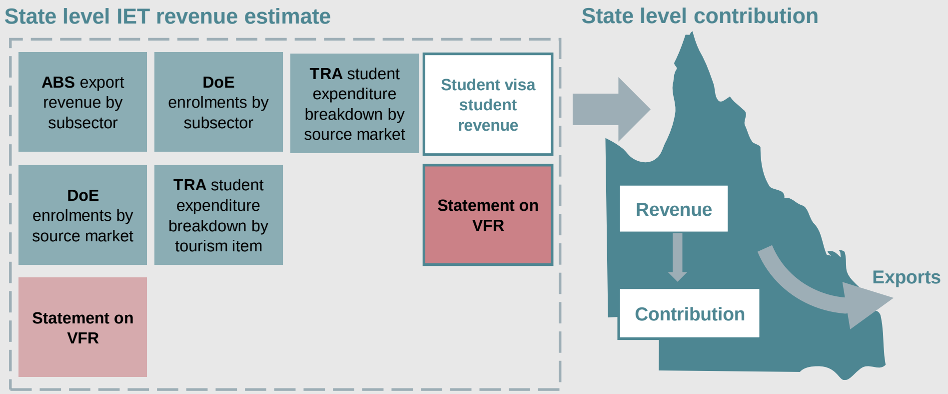
Economic contribution model

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.