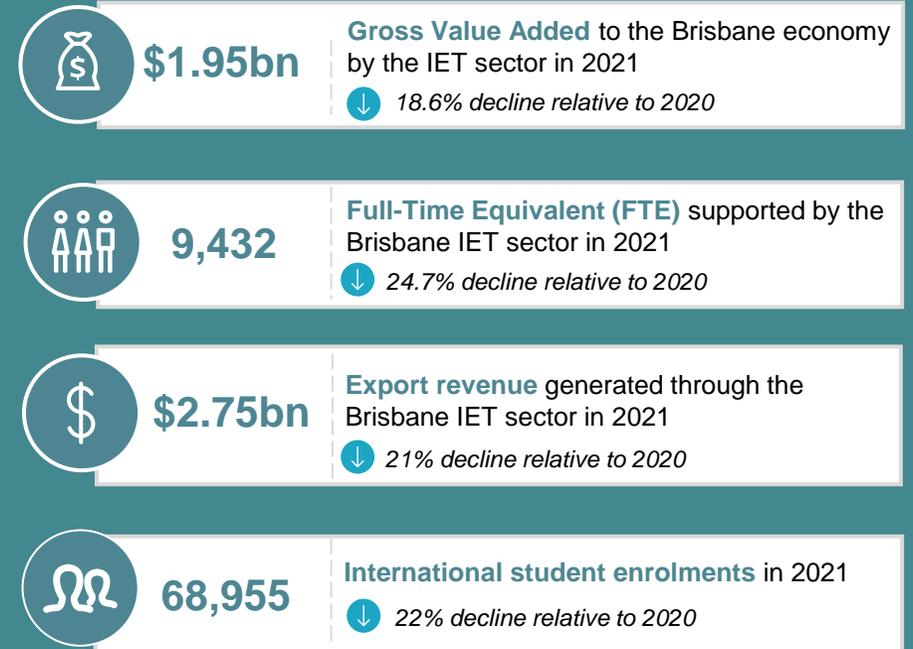


International education & training snapshot: Brisbane 2021



International student enrolments

International student enrolments

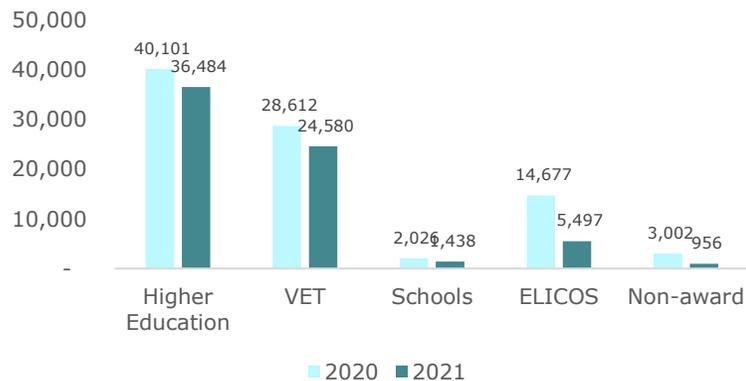
 **68,955**
enrolments in 2021

In 2021, student enrolments in Brisbane (on student visas) totalled 68,955. **Higher education (HE)** remained the largest sub-sector, with **36,484** enrolments, followed by the VET and ELICOS sub-sectors.

 **-22%**
decline in enrolments 2020 to 2021

Total international student enrolments in Brisbane **declined by 22% compared to 2020 levels**. ELICOS and Non-award programs experienced the largest percentage decline of 63% and 68% respectively.

Chart 1: IET enrolments by sub-sector, 2021



Source: Australian Government Department of Education. Enrolments in December each year.

Note: (1) The totals presented in each table 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.

Enrolments by source market

The largest source markets for international student enrolments in Brisbane continued to be China and India, which together accounted for **45% of total enrolments in 2021**.

Compared to the Queensland average, Brisbane has a substantially higher share of enrolments from China (6 percentage points)

None of Brisbane's top ten source markets experienced positive enrolment growth in 2021.

Table 2: Enrolments in top five source markets, 2020 to 2021

	2020		2021		Growth (share)
	Enrolments	Share	Enrolments	Share	
China	24,359	28%	21,769	31%	↑
India	11,538	13%	9,313	13%	-
Colombia	5,992	7%	3,882	6%	↓
Nepal	4,459	5%	3,275	5%	-
Korea	4,205	5%	3,102	4%	↓
Total	50,630	57%	41,341	60%	↑

Source: Australian Government Department of Education.

 **60%**

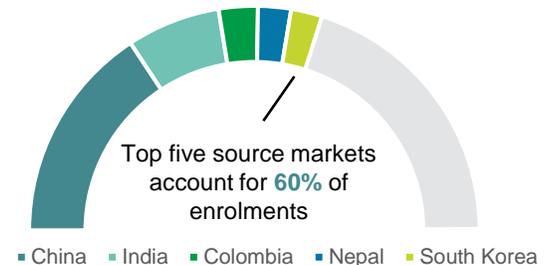
The share of total enrolments attributable to the top five source markets, higher than the Queensland total of 56%.

Source market concentration

Overall, Brisbane is the **fourth most concentrated IET sector in Queensland**, with a diversity index score of **1,320** in 2021*. From 2020 to 2021, Brisbane has become slightly more concentrated, with the diversity index increasing from 1,121 in 2020.

This was driven by an increased concentration of enrolments in Brisbane's top five source markets, which have increased to account for 60% of enrolments in 2021, a slight increase from 57% in 2020. Underlying this was the increased share of the Chinese market.

The top five source markets accounted for **60%** of IET enrolments in Brisbane, compared to 56% for Queensland.



*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.

Regional concentration

Geographically, Brisbane accounted for **70% of IET enrolments in Queensland in 2021**.

Export revenue

\$2.75bn
Export revenue in 2021

Total export revenue from international student expenditure on tuition fees and goods and services, and visiting friends and relatives expenditure, was **\$2.75 billion in 2021**.

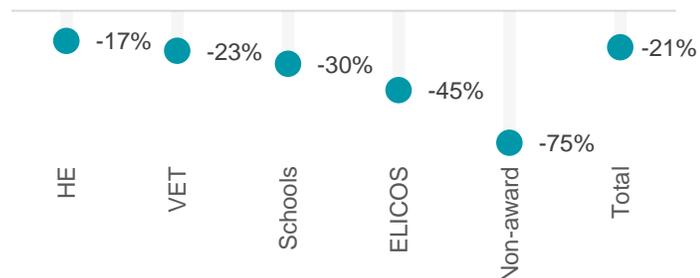
The HE sub-sector made the largest contribution to revenue in Brisbane, with \$2.0 billion revenue for 2021, accounting for 71% of total IET export revenue in Brisbane.

-21%
decline in export revenue from 2020 to 2021

Overall, export revenue declined by 21% from 2020 to 2021.

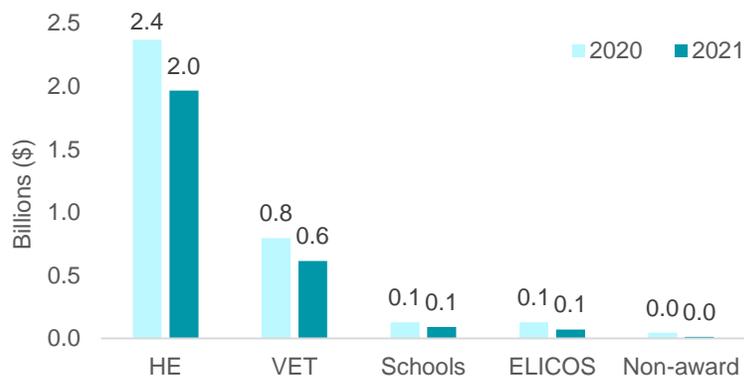
Export revenue declined at a similar rate than enrolments in 2021.

Chart 3: Growth rate (%) of export revenue by IET sub-sector, 2020 to 2021



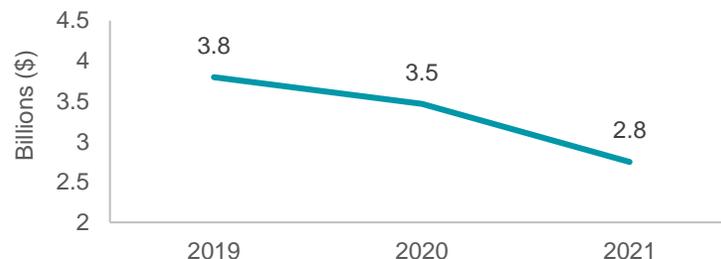
Source: Australian Bureau of Statistics, Australian Government Department of Education, Deloitte Access Economics estimates.

Chart 4: IET revenue by sub-sector, 2020 and 2021 (\$bn)



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

Chart 5: IET export revenue from 2019 to 2021 (\$bn)



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

Regional breakdown

Brisbane remained the largest segment of the Queensland IET sector, attracting **71.3% of export revenue** in 2021. Export revenue declined by **21%** in 2021.

Capacity of CRICOS providers

79%
Operating capacity of Brisbane institutions.

In 2021, there were approximately **274 CRICOS education providers in Brisbane** with a total capacity of 86,831 CRICOS registered places.*

Brisbane's educational institutions were operating at approximately 79% capacity in 2021.

Brisbane is operating at the second highest capacity compared to other regions in the state, and higher than Queensland's operating capacity of 47%. However, there exists capacity to facilitate further growth in the region.

*Deloitte Access Economics uses CRICOS registered places as a measure of capacity and student enrolments as a measure of demand.

Economic contribution of the IET sector

Direct economic contribution

The IET sector directly contributed **\$1.15 billion** to the Brisbane economy and supported **5,134 full-time equivalent (FTE)** jobs in 2021 (Table 1).

This represents the value of economic activity associated with businesses that directly supply goods and services to international students and their visitors.

Table 1: Direct economic contribution of the IET sector, 2021

	Value added (\$m)	Employment (FTE)
Onshore students	893.5	4,899
Offshore students	257.9	218
VFRs	1.8	17
IET sector	1,153.2	5,134

Source: Deloitte Access Economics estimates.

Indirect economic contribution

The IET sector also indirectly contributed **\$799 million** and **4,298 jobs (FTE)** to Brisbane in 2021. 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 2: Indirect economic contribution of the IET sector, 2021

	Value added (\$m)	Employment (FTE)
Onshore students	669.6	3,729
Offshore students	127.4	558
VFRs	1.7	11
IET sector	798.7	4,298

Source: Deloitte Access Economics estimates.

Total economic contribution



\$1.95bn

Value added to the Brisbane economy by the IET sector in 2021

In total, the IET sector contributed **\$1.95 billion** and supported **9,432 full-time equivalent (FTE) jobs** in the Brisbane regional economy in 2021. This represents a decline of **18.6%** in total value added contribution, and **24.7%** in employment from 2020.

Table 3: Growth in economic contribution of the IET sector, 2020 to 2021

	2020 to 2021
Value added	-18.6%
Employment (FTE)	-24.7%

Source: Deloitte Access Economics estimates; Australian Bureau of Statistics.

Key industries

The most significant industries supporting the IET sector in Brisbane are **education and training** (49%), **accommodation services** (21%), and **takeaway and restaurant meals** (8%). Together, they comprised of 78% of Brisbane export revenue from the IET sector.

Table 4: Direct employment breakdown by IET industry (economic contribution), 2021

Industry	Employment (FTE)
Accommodation	1,664
Cafes, restaurants and takeaway food services	811
Clubs, pubs, taverns and bars	288
Rail transport	42
Road transport and transport equipment rental	355
Air, water and other transport	74
Travel agency and tour operator services	0
Cultural services	114
Casinos and other gambling services	68
Other sports and recreation services	205
Retail trade	594
Education and training	584
All other industries	334

Source: Deloitte Access Economics estimates; Australian Bureau of Statistics.

Note: (1) The totals presented in each table 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.

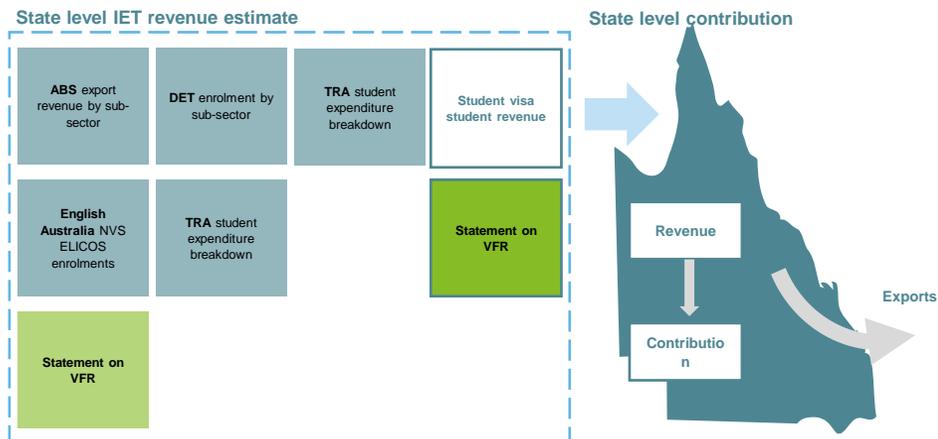
Frequently Asked Questions

Methodology

Trade and Investment Queensland has worked with Deloitte Access Economics to produce consistent and comparable regional estimates of the contribution of IET to Queensland and its regions. The analysis has been informed by publicly available enrolment and expenditure data from the Commonwealth Department of Education, the Australian Bureau of Statistics (ABS), and Tourism Research Australia (TRA).

The ABS accounts for the impact of COVID-19 on IET export revenue by: (1) capturing the course fee of students studying offshore through 'correspondence courses' rather than 'education-related personal travel', (2) reflecting lower expenditure resultant from any students that have deferred their enrolments, and (3) reflecting any potential changes in students' expenditure on goods and services by using the latest TRA data on student expenditure.

Economic contribution estimates are produced using modelling assumptions consistent with Tourism Research Australia's Regional Tourism Satellite Account (RTSA) model. This 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. This is the first year in which this methodology has been available to use in the IET context, and hence represents a substantial methodological change to previous years. To account for this change and enable fair year-on-year comparisons, the 2020 economic contribution estimates in these factsheets have been 'back-cast' by applying the new methodology to the previous year's data. Hence, there are minor differences between the 2020 results presented in these factsheets, and those included in the previous year's factsheets (as noted in the results).



Understanding economic contribution

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.

Using the results

For consistency in reporting, value added and employment (rather than export revenue) are the correct 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.

Glossary

Contribution

<i>Direct contribution</i>	The contribution generated by direct transactions between the international student and the producer of goods and services. This includes their education fees, as well as living expenses.
<i>Indirect contribution</i>	The subsequent flow-on effects created by the requirement for inputs from those industries supplying goods and services to IET. For example, this might include the fresh produce supplied to supermarkets visited by students.
<i>Total contribution</i>	The sum of the direct and indirect contributions from IET.

Export revenue

The sales revenue received by the IET sector in providing goods and services to international students.

Value added

A measure of the sector's return on its capital and labour. It is the indication of the sector's value and contribution to the regional economy. Export revenue and value added should not be summed.

Visiting friends and relatives (VFR)

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

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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