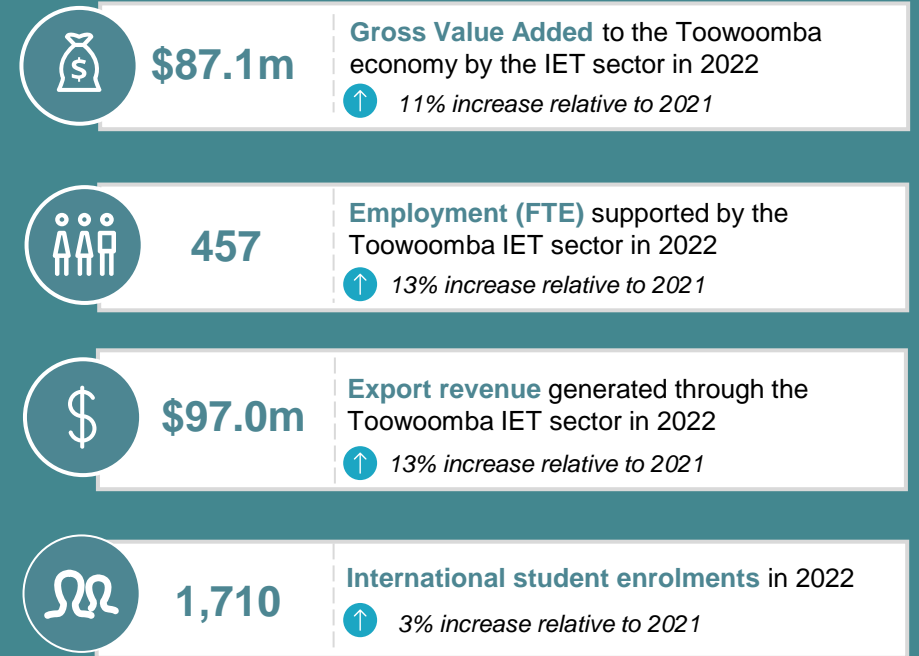


International education & training snapshot:

Toowoomba 2022

Publication date: September 2023



International student enrolments and commencements

International student enrolments

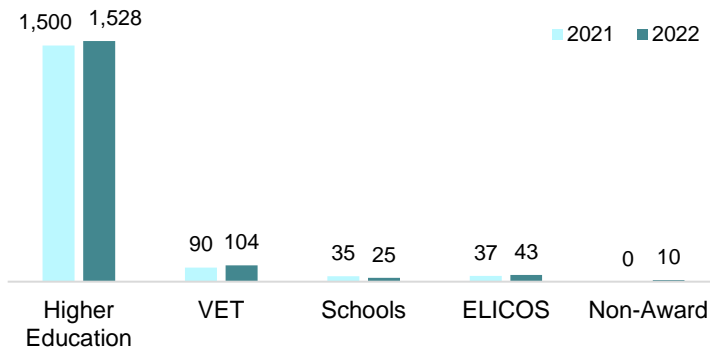
1,710
enrolments in 2022

In 2022, student enrolments in Toowoomba (on student visas) totalled 1,710. **Higher Education (HE) remained the largest sub-sector, with 1,528 enrolments**, followed by the Vocational Education and Training (VET), English Language Intensive Courses for Overseas Students (ELICOS), Schools and Non-Award sub-sectors (Chart 1).

3%
increase in enrolments 2021 to 2022

Total international student enrolments in Toowoomba **increased by 3% compared to 2021 levels**. This was driven by positive year-on-year (YOY) growth in enrolments in all sub-sectors, with the exception of Schools.

Chart 1: IET enrolments by sub-sector, 2021-2022



Source: Australian Government Department of Education, international student enrolment data by ABS SA4. Enrolments in December of each year. Data as of March 2023 release.

Enrolments by source market

The largest source markets for international student enrolments in Toowoomba continued to be India and Nepal, which together accounted for **44% of total enrolments in 2022** (Table 1).

Compared to the Queensland average, Toowoomba had a substantially higher share of enrolments from India and Nepal (12 and 14 percentage points higher respectively).

Nepal and Singapore were the only source markets in Toowoomba's top five to experience positive YOY enrolment growth in 2022.

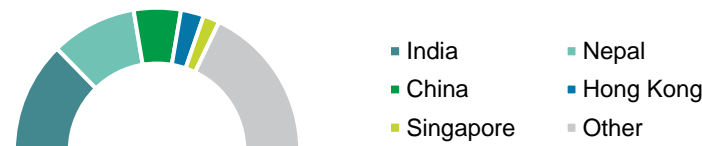
Table 1: Enrolments in top five source markets, 2021-2022

	2021		2022		Growth (share)
	Enrolments	Share	Enrolments	Share	
India	477	29%	438	25%	↓
Nepal	289	17%	335	19%	↑
China	199	12%	184	11%	↓
Hong Kong SAR	90	5%	90	5%	-
Singapore	59	4%	64	4%	-

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

Source market concentration

Enrolments in the top five source markets accounted for **64% of the Toowoomba's international student enrolments** in 2022. The concentration of the Toowoomba's top five source markets was higher than that of the state's concentration of 52%.



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

International student commencements

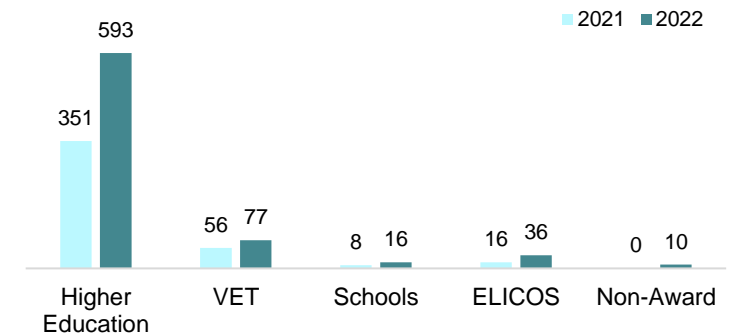
732
commencements in 2022

In 2022, student commencements in Toowoomba (on student visas) totalled 732. **HE** observed the largest number of commencements, followed by VET and ELICOS, Schools and Non-Award (Chart 2).

70%
increase in commencements 2021 to 2022

Total international student commencements in Toowoomba **increased by 70% compared to 2021 levels**. The regions smaller sub-sectors ELICOS and Schools experienced the largest percentage increases of 125% and 100% respectively.

Chart 2: IET commencements by sub-sector, 2021-2022



Source: Australian Government Department of Education, international student commencement data by ABS SA4. Commencements in December of each year. Data as of March 2023 release.

Export revenue of the IET sector

Export revenue

\$97.0m
Export revenue in 2022

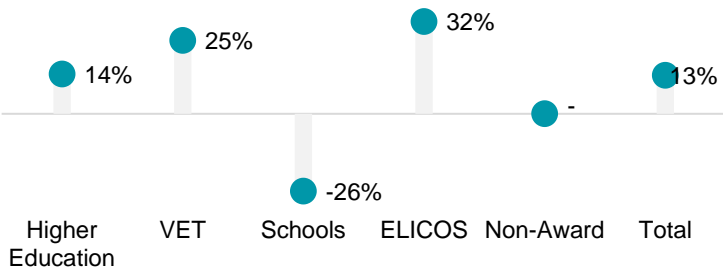
Total export revenue from international student expenditure on tuition fees, goods and services, and visiting friends and relatives expenditure totalled \$97.0 million in 2022. Toowoomba was the fifth largest segment of the IET sector, accounting for **2.3% of Queensland's IET export revenue** in 2022.

The HE sub-sector made the largest contribution to IET export revenue. The sector contributed \$91.7 million, which accounted for 95% of IET export revenue in Toowoomba.

13%
increase in export revenue from 2021 to 2022

Overall, IET export revenue increased by 13% from 2021 to 2022 (Chart 3). This was driven by positive YOY growth in export revenue across all IET sub-sectors, with the exception of Schools.

Chart 3: Export revenue growth between 2021 and 2022, by IET sub-sector

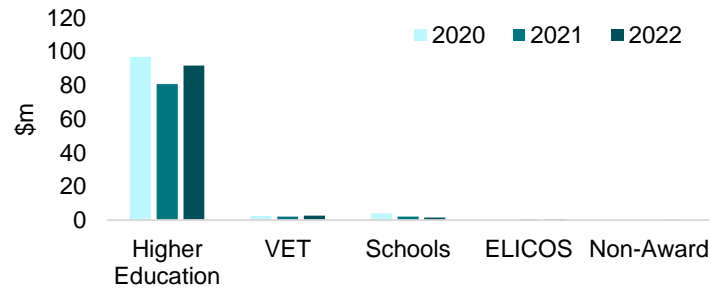


Source: Australian Bureau of Statistics, Australian Government Department of Education, Tourism Research Australia, Deloitte Access Economics estimates.

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

Between 2021 and 2022 export revenue increased in all sub-sectors except for Schools (Chart 4). Despite growth, IET export revenue remains below 2020 levels.

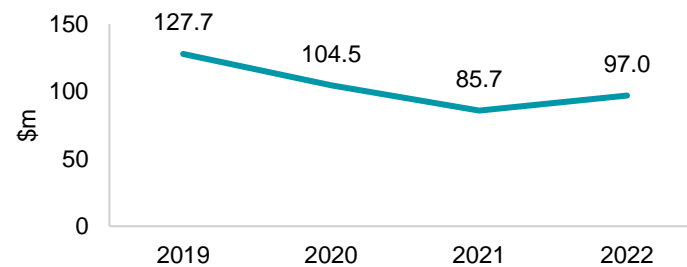
Chart 4: IET export revenue by sub-sector, 2020-2022 (\$m)



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

IET export revenue began to recover in 2022, following a low in 2021. While export revenue experienced positive YOY growth, it is yet to reach pre-pandemic levels (i.e. 2019 levels) (Chart 5).

Chart 5: IET export revenue from 2019-2022 (\$m)

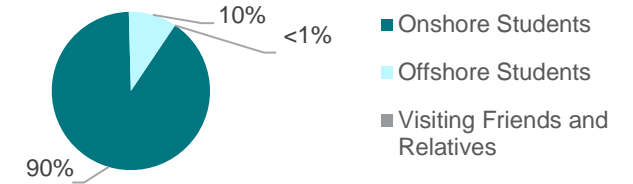


Source: Australian Bureau of Statistics, Australian Government Department of Education, Tourism Research Australia, Deloitte Access Economics estimates.

Breakdown of export revenue

Onshore student expenditure accounted for 90% of Toowoomba's total IET export revenue. Offshore students and VFRs accounted for the remaining IET export revenue in Toowoomba.

Chart 6: Breakdown of IET export revenue



Source: Australian Bureau of Statistics, Australian Government Department of Education, Tourism Research Australia, Deloitte Access Economics estimates. Note: Visiting Friends and Relatives expenditure is estimated using Tourism Research Australia data.

CRICOS providers and courses[^]

An estimated 17 providers operated in Toowoomba with approximately 9,620 places offered to international students. The number of providers is up 6% and places are down 0.1% on 2021 levels (Table 2).

Table 2: CRICOS providers, courses and places, 2021-2022

	2021	2022	YOY growth
Providers	16	17	6%
Courses	222	224	1%
Places	9,632	9,620	-0.1%

An estimated 224 courses were offered in Toowoomba, of which 62% were offered in HE (Table 3).

Table 3: Share of CRICOS courses by IET sector, 2022

	Higher Education	VET	Schools	ELICOS	Non-award
Toowoomba	62%	23%	11%	3%	2%

Source: Australian Government Department of Education. Deloitte Access Economic estimates. Data current as of 1 December 2022.

[^]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, courses and places 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.

Economic contribution of the IET sector

Direct economic contribution

The IET sector directly contributed **\$53.6 million** to the Toowoomba region and supported **274 full-time equivalent (FTE)** jobs in 2022 (Table 4). This represents the value of economic activity associated with businesses that directly supply goods and services to international students and their visitors.

Table 4: Direct economic contribution of the IET sector, 2021-2022

	2021 value-added (\$m)	2022 value-added (\$m)	Growth in value-added	2021 jobs (FTE)	2022 jobs (FTE)	Growth in jobs
Onshore students	\$35.3	\$44.5	26%	225	262	16%
Offshore students	\$12.9	\$9.1	-29%	16	11	-29%
VFRs	\$0.06	\$0.02	-61%	1	0	-67%
IET sector	\$48.2	\$53.6	11%	242	274	13%

Source: Deloitte Access Economics estimates.

Notes: (1) This table includes the most contemporary results from 2021 and 2022. Factsheets from previous years have been reissued such that they contain revised results. (2) Due to changes in VFR data availability, there has been a methodological change in the estimation of IET related VFR expenditure from 2021 to 2022. VFR data can be highly volatile from year-to-year, meaning that results should be treated with caution.

Indirect economic contribution

The IET sector also indirectly contributed **\$33.5 million** and supported **183 jobs (FTE)** in the Toowoomba region in 2022 (Table 5). This represents the flow-on effects for industries that supply goods and services to the IET sector. This includes the maintenance services supplied to training providers, and the agricultural producers that restaurants source their food from.

Table 5: Indirect economic contribution of the IET sector, 2021-2022

	2021 value-added (\$m)	2022 value-added (\$m)	Growth in value-added	2021 jobs (FTE)	2022 jobs (FTE)	Growth in jobs
Onshore students	\$25.0	\$30.0	20%	141	168	20%
Offshore students	\$4.8	\$3.4	-30%	21	15	-29%
VFRs	\$0.06	\$0.02	-63%	0	0	-64%
IET sector	\$29.9	\$33.5	12%	162	183	13%

Source: Deloitte Access Economics estimates.

Notes: (1) This table includes the most contemporary results from 2021 and 2022. Factsheets from previous years have been reissued such that they contain revised results. (2) Due to changes in VFR data availability, there has been a methodological change in the estimation of IET related VFR expenditure from 2021 to 2022. VFR data can be highly volatile from year-to-year, meaning that results should be treated with caution.

Note: The totals and growth rates presented in each table may differ slightly from the sum or growth of each component part due to rounding.

Total economic contribution



\$87.1m

value added to the Toowoomba region by the IET sector in 2022

In total, the IET sector contributed **\$87.1 million** and supported **457 full-time equivalent (FTE) jobs** in the Toowoomba regional economy in 2022. This represents a decline of **11%** in total value added contribution, and **13%** in employment from 2021 (Table 6)*.

Table 6: Growth in economic contribution of the IET sector, 2021 to 2022

Value added	11%
Employment (FTE)	13%

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

*This factsheet includes the most contemporary results from 2021 and 2022.

Key industries

The most significant industries supporting the IET sector in Toowoomba were accommodation (33%), education and training (16%), and cafes, restaurants and takeaway services (16%) (Table 7). Together, these industries accounted for 65% of the direct FTE employment supported by the IET sector in Toowoomba.

Table 7: Direct employment breakdown by IET industry (economic contribution), 2022

Industry	Direct employment (FTE)
Accommodation	90
Education and training	44
Cafes, restaurants and takeaway food services	43
Retail trade	32
Road transport and transport equipment rental	20
Clubs, pubs, taverns and bars	15
Other sports and recreation services	6
Air, water and other transport	3
Rail transport	2
Cultural services	2
Casinos and other gambling services	2
All other industries	15

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

*This factsheet includes the most contemporary results from 2021 and 2022.

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 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 second year in which this methodology has been available to use in the IET context, and hence represents a substantial methodological change to previous years.

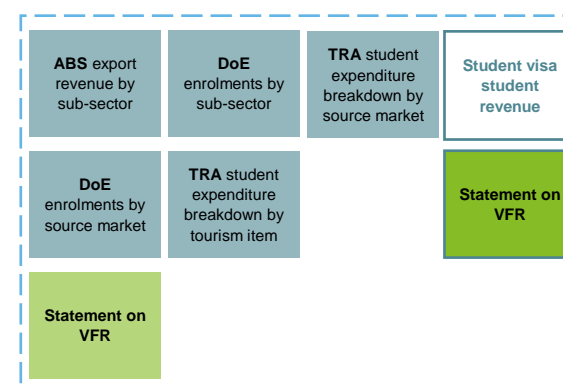
Data sources

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 Tourism Research Australia (TRA). The frequency of data publication is dependent on data custodian where some data is published on a monthly basis (e.g. DoE enrolment and commencement data[^]) while others are published on an annual basis (e.g. ABS)

During COVID-19 there was an increase in the number of international students studying offshore. 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. Offshore export revenue (i.e. offshore tuition fees) is estimated using the ABS correspondence course data.

During COVID-19, there were changes in the availability of TRA data (i.e. limited International Visitor Survey (IVS) data was collected). Due to changes in data availability, there has been methodological changes in the estimation of VFR expenditure over time. In 2021, VFR expenditure was estimated using national level data as Queensland observed insufficient sample sizes across key IVS variables. In 2022, Queensland observed sufficient sample sizes across key IVS variables meaning Queensland data was used in estimations.

State level IET revenue estimate



State level contribution



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.