International education & training snapshot:

Moreton Bay 2021

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$33.5m — **Gross Value Added** to the Moreton Bay economy by the IET sector in 2021

18.6% decline relative to 2020

162 — **Full-Time Equivalent (FTE)** supported by the Moreton Bay IET sector in 2021

24.7% decline relative to 2020

$14.9m — **Export revenue** generated through the Moreton Bay IET sector in 2021

2.2% decline relative to 2020

268 — **International student enrolments** in 2021

7% growth relative to 2020

International student enrolments

International student enrolments

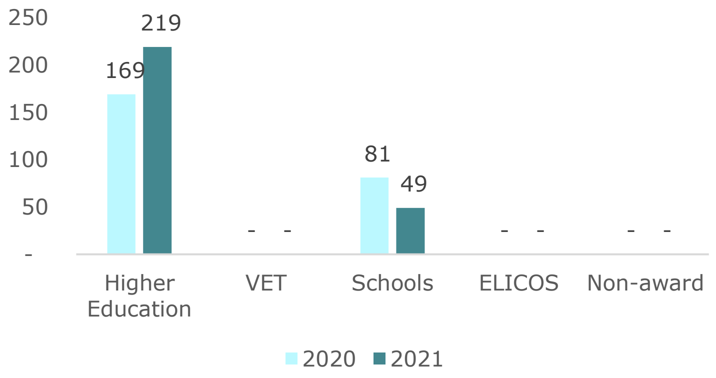
268
enrolments in 2021

In 2021, student enrolments in Moreton Bay (on student visas) totalled 268. **Higher education (HE)** remained the largest sub-sector, with **219** enrolments, followed by the schools sub-sector.

7%
growth in enrolments 2020 to 2021

Moreton Bay was **the only region in Queensland that experienced positive enrolment growth from 2020-21 (+7%).** This was primarily driven by growth in the Higher Education sector, with enrolments growing by 30%.

Chart 1: IET enrolments by sub-sector, 2021



Source: Australian Government Department of Education, international student enrolment data. Enrolments in December each year.

Enrolments by source market

The largest source markets for international student enrolments in Moreton Bay continued to be Nepal and India, which together accounted for **50% of total enrolments in 2021**.

Compared to the other regions in Queensland, Moreton Bay as a region attracts higher share of students from Nepal, India, Philippines and Korea.

Three of Moreton Bay's top ten source markets recorded growth in IET enrolments in 2021. These were Nepal (45%), India (4%) and Philippines (7%).

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

	2020		2021		
Country	Enrolments	Share	Enrolments	Share	Growth (share)
Nepal	74	25%	107	33%	⬆
India	52	17%	54	17%	-
Philippines	29	10%	31	10%	-
Korea	25	8%	20	6%	⬇
China	19	6%	13	4%	⬇
Total	199	66%	225	69%	⬆

Source: Australian Government Department of Education.

69%

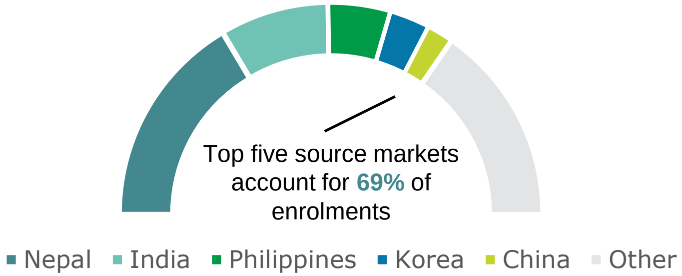
The share of total enrolments attributable to the top five source markets, higher than the Queensland total of 56%.

Source market concentration

Overall, Moreton Bay **is the tenth most diverse IET sector in Queensland**, with a diversity index score of **1,555** in 2021*. In 2021, Moreton Bay has become more concentrated, with the diversity index increasing from 1234 in 2020.

This is despite the decreased concentration of enrolments in Moreton Bay's top five source markets, which have decreased to account for 69% of enrolments in 2021, relative to 70% in 2020.

The top five source markets accounted for **69%** of IET enrolments in Moreton Bay, 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, Moreton Bay accounted for **0.3% of IET enrolments in Queensland in 2021.**

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.

Export revenue

$14.9m
Export revenue in 2021

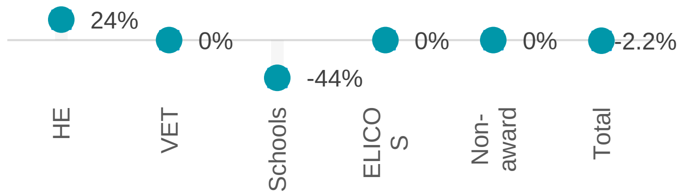
Total export revenue from international student expenditure on tuition fees and goods and services was **$14.9 million in 2021.**

The HE sub-sector made the largest contribution to revenue in Moreton Bay, with $11.8 million revenue for 2021, accounting for 79.4% of total IET export revenue.

-2.2%
decline in export revenue from 2020 to 2021

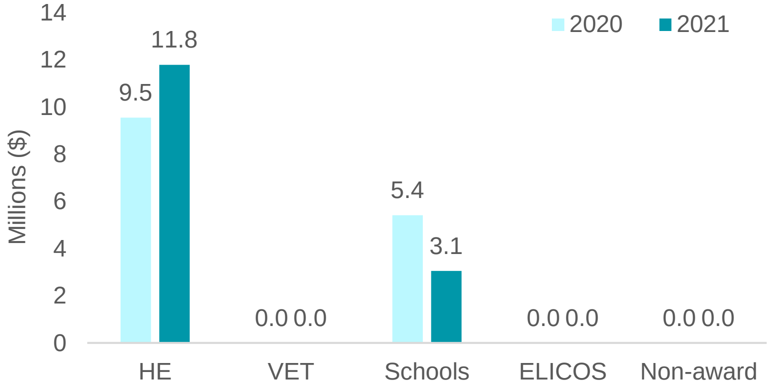
Overall, export revenue declined by 2.2% from 2020 to 2021, despite enrolments growing over the same period.

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



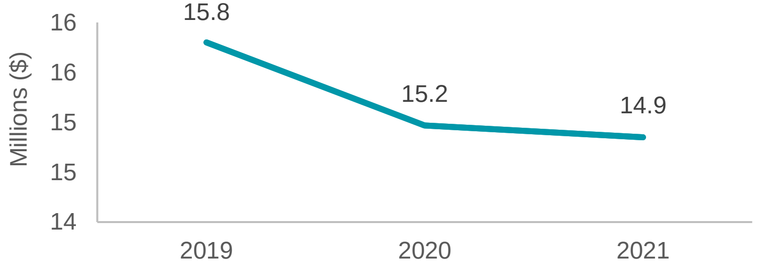
Source: Australian Bureau of Statistics, Australian Government Department of Education, Deloitte Access Economics estimates.

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



Source: Australian Bureau of Statistics, Australian Government Department of Education, Skills and Employment.

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



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

Regional breakdown

Moreton Bay was the ninth largest segment of the Queensland IET sector, attracting **0.4% of export revenue** in 2021. Export revenue declined by **2.2%** in 2021.

Capacity of CRICOS providers

15%
Operating capacity of Moreton Bay institutions

In 2021, **there were approximately 13 CRICOS education providers in Moreton Bay** with a total capacity of 1,813 CRICOS registered places.*

Moreton Bay's educational institutions were operating at approximately 15% capacity in 2021.

Moreton Bay was operating at lower capacity compared to other regions in the state, and lower than Queensland's operating capacity of 47%. Hence, 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.

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.

Economic contribution of the IET sector

Direct economic contribution

The IET sector directly contributed **$19.8 million** to the Moreton Bay economy and supported **88 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	15.3	84
Offshore students	4.4	4
VFRs	0.0	0
IET sector	**19.8**	**88**

Source: Deloitte Access Economics estimates.

Indirect economic contribution

The IET sector also indirectly contributed **$13.7 million** and **74 jobs (FTE)** to Moreton Bay 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	11.5	64
Offshore students	2.2	10
VFRs	0.0	0
IET sector	**13.7**	**74**

Source: Deloitte Access Economics estimates.

Total economic contribution

$33.5m
Value added to the Moreton Bay economy by the IET sector in 2021

In total, the IET sector contributed **$33.5 million** and supported **162 full-time equivalent (FTE) jobs** in the Moreton Bay 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 Moreton Bay are **education and training** (49%), **accommodation services** (21%), and **takeaway and restaurant meals** (8%). Together, they comprised of 78% of Moreton Bay export revenue from the IET sector.

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

Industry	Employment (FTE)
Accommodation	29
Cafes, restaurants and takeaway food services	14
Clubs, pubs, taverns and bars	5
Rail transport	1
Road transport and transport equipment rental	6
Air, water and other transport	1
Travel agency and tour operator services	0
Cultural services	2
Casinos and other gambling services	1
Other sports and recreation services	4
Retail trade	10
Education and training	10
All other industries	6

Source: Deloitte Access Economics estimates.

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.

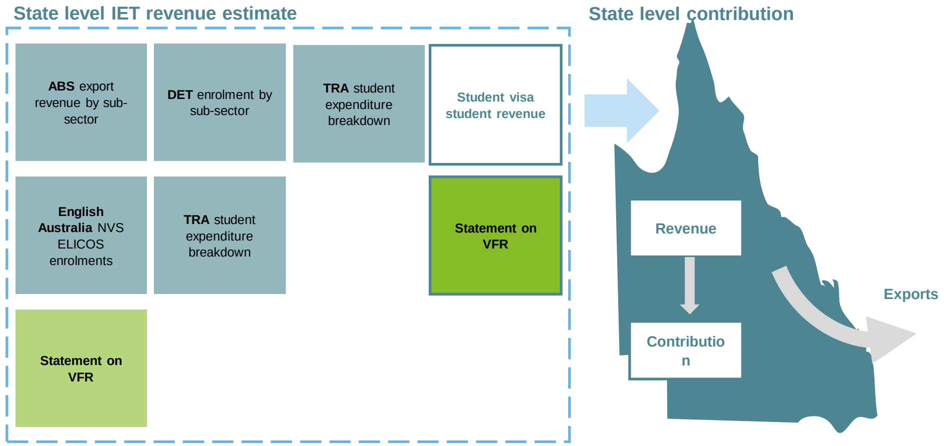
Frequently Asked Questions

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	
Direct contribution	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.
Indirect contribution	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.
Total contribution	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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