

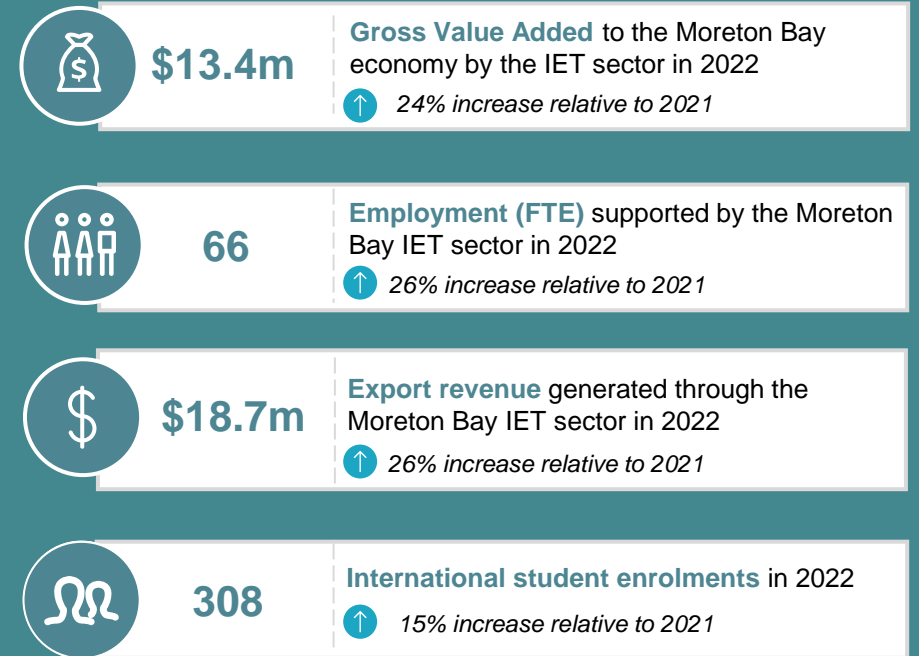
International education & training snapshot: Moreton Bay 2022

Publication date: September 2023

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International student enrolments and commencements

International student enrolments

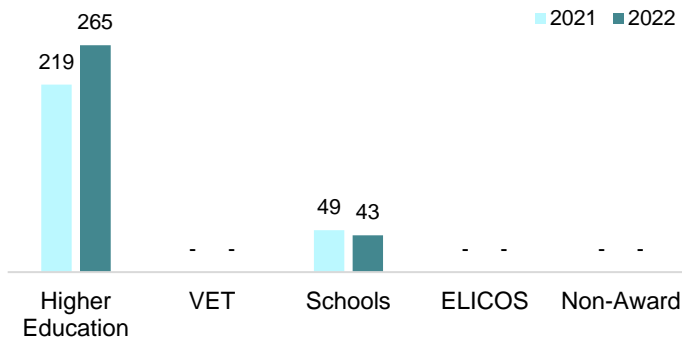
308
enrolments in 2022

In 2022, international student enrolments in the Moreton Bay region (on student visas) totalled 308. IET enrolments were spread across the Higher Education (HE) and School sub-sectors (Chart 1).

15%
increase in enrolments 2021 to 2022

Total international student enrolments in the Moreton Bay region **increased by 15% compared to 2021 levels**. The HE sector observed positive growth of 21% in 2022 and the Schools sector observed a 12% drop in IET enrolments in 2022.

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



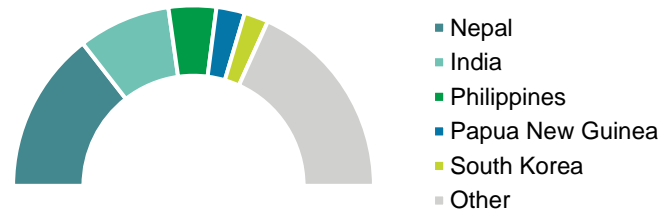
Source: Australian Government Department of Education, international student enrolment data by ABS SA4. Enrolments in December of each year. Data as of March 2023 release.

Note: Reporting is restricted when there are less than five enrolments.

Enrolments by source market

Source market data was not available for some of Queensland's smaller IET markets due to imposed data restrictions (i.e. less than five enrolments in a given sector or source market). To overcome these restrictions and potential volatility in the data, source market data was aggregated and analysed across multiple regions including the Central Queensland, Darling Downs – Maranoa and Widebay, Mackay-Isaac-Whitsunday and Moreton Bay regions.

Across Queensland's smaller IET markets (by enrolment share)[^], enrolments in the **top five source markets accounted for 64%** of total enrolments in these regions.* The source market concentration among the top five source markets in these regions is lower than Queensland's concentration (52%).



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

[^]Includes enrolments from the following regions: Central Queensland, Darling Downs – Maranoa and Widebay, Mackay-Isaac-Whitsunday and Moreton Bay.

International student commencements

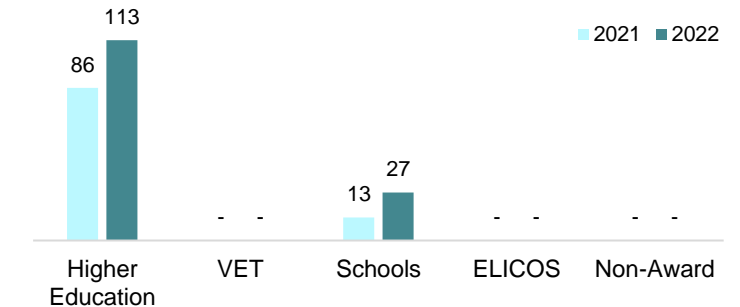
140
commencements in 2022

In 2022, 140 international students commenced education and training in the Moreton Bay region. The two sub-sectors with commencements were **HE and Schools** with commencements of 113 and 27, respectively (Chart 3).

41%
increase in commencements 2021 to 2022

Total international student commencements in Moreton Bay **increased by 41% compared to 2021 levels**. Commencements grew by 31% and 108% respectively in the HE and school sectors.

Chart 3: IET commencements by sub-sector, 2021 and 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.

Note: Reporting is restricted when there are less than five commencements.

Export revenue of the IET sector

Export revenue

\$18.7m
Export revenue in 2022

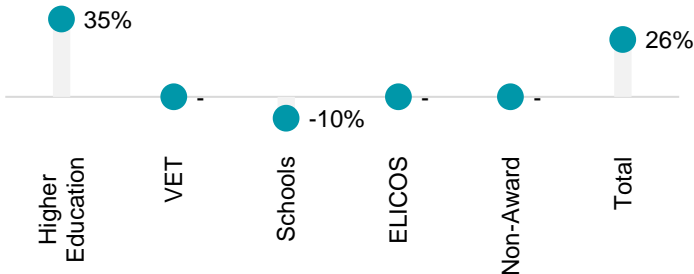
Total export revenue from international student expenditure on tuition fees, goods and services, and visiting friends and relatives expenditure totalled \$18.7 million in 2022. The Moreton Bay region was the ninth largest segment of the IET sector, accounting for **0.4% of Queensland's IET export revenue** in 2022.

The HE sub-sector made the largest contribution to IET export revenue in the Moreton Bay region, with \$15.9 million export revenue, accounting for 85% of the region's IET export revenue in 2022.

26%
increase in export revenue from 2021 to 2022

Total IET export revenue increased by 26% from 2021 to 2022. HE was only the sub-sector that experienced positive growth in export revenue, in line with enrolment growth (Chart 4).

Chart 4: Export revenue growth between 2021 and 2022, by IET sub-sector

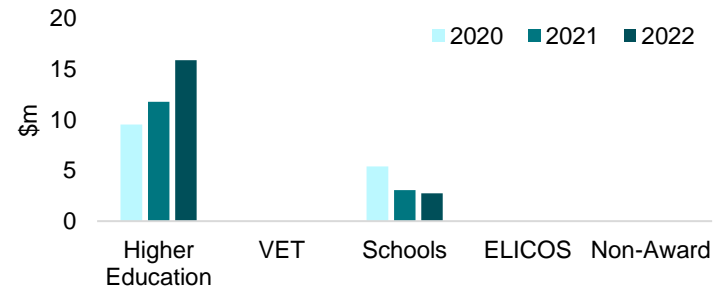


Source: Australian Bureau of Statistics, Australian Government Department of Education, Tourism Research Australia, Deloitte Access Economics estimates.

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.

Export revenue in HE increased YOY from 2020 to 2022, while export revenue in Schools decreased each year over the same period. All other sub-sectors remained at \$0 in line with enrolments (Chart 5).

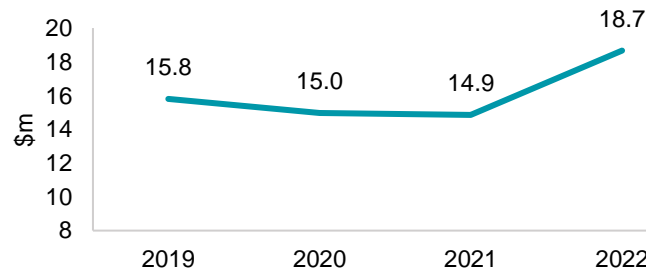
Chart 5: IET export revenue by sub-sector, 2020-2022 (\$m)



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. IET export revenue exceeded pre-pandemic levels (i.e. 2019 levels) in 2022 (Chart 6).

Chart 6: IET export revenue from 2019-2022 (\$m)

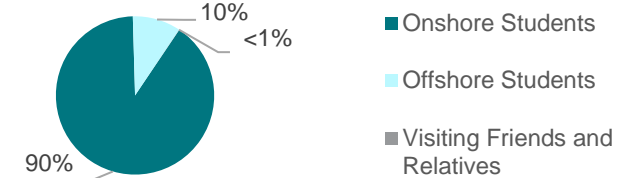


Source: Australian Bureau of Statistics, Australian Government Department of Education, Tourism Research Australia, Deloitte Access Economics estimates.

Breakdown of export revenue

Onshore student expenditure accounted for 90% of Moreton Bay's total export revenue (Chart 7). Offshore students and VFRs accounted for the remaining export revenue in the Moreton Bay region.

Chart 7: 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^A

An estimated 10 providers operated in Moreton Bay with approximately 2,716 places offered to international students. The number of providers is down 9% and places are down 5% on 2021 levels (Table 1).

Table 1: CRICOS providers, courses and places, 2021-2022

	2021	2022	YOY growth
Providers	11	10	-9%
Courses	98	119	21%
Places	2,867	2,716	-5%

An estimated 119 courses were offered in Moreton Bay, over half of which were offered in HE (Table 2).

Table 2: Share of CRICOS courses by IET sector, 2022

	Higher Education	VET	Schools	ELICOS	Non-award
Moreton Bay	57%	28%	12%	0%	3%

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

^AThese 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 **\$7.9 million** to the Moreton Bay region and supported **36 full-time equivalent (FTE)** jobs in 2022 (Table 3). This represents the value of economic activity associated with businesses that directly supply goods and services to international students and their visitors.

Table 3: 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	\$4.9	\$6.7	35%	27	35	28%
Offshore students	\$1.4	\$1.2	-19%	1	1	-18%
VFRs	\$0.01	\$0.00	-57%	0	0	-61%
IET sector	\$6.4	\$7.9	23%	28	36	26%

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 **\$5.5 million** and supported **30 jobs (FTE)** in the Moreton Bay region in 2022 (Table 4). 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 4: 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	\$3.7	\$4.9	33%	21	27	33%
Offshore students	\$0.7	\$0.6	-19%	3	3	-18%
VFRs	\$0.01	\$0.00	-56%	0	0	-57%
IET sector	\$4.4	\$5.5	25%	24	30	26%

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



\$13.4m

value added to the Moreton Bay region by the IET sector in 2022

In total, the IET sector contributed **\$13.4 million** and supported **66 full-time equivalent (FTE) jobs** in the Moreton Bay region in 2022. This represents an increase of **24%** in total value added contribution, and **26%** in employment from 2021 levels (Table 5)*.

Table 5: Growth in economic contribution of the IET sector, 2021 to 2022

Value added	24%
Employment (FTE)	26%

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 Moreton Bay were **accommodation** (31%), cafes, restaurants and takeaway food services (16%) and retail trade (13%) (Table 6). Together, these industries accounted for 60% of the direct FTE employment supported by the IET sector in the Moreton Bay region.

Table 6: Direct employment breakdown by IET industry (economic contribution), 2022

Industry	Direct employment (FTE)
Accommodation	11
Cafes, restaurants and takeaway food services	6
Retail trade	5
Education and training	4
Road transport and transport equipment rental	3
Clubs, pubs, taverns and bars	2
Air, water and other transport	1
Cultural services	1
Other sports and recreation services	1
Rail transport	0
Casinos and other gambling services	0
All other industries	2

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.

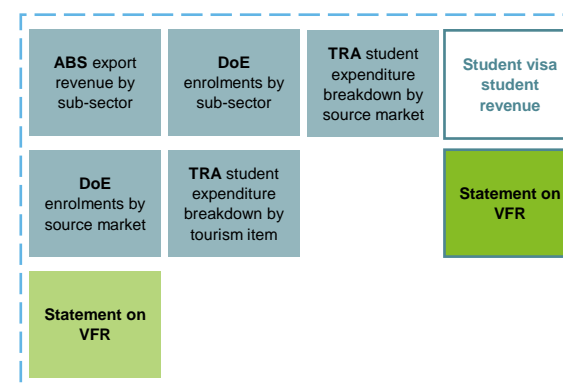
Data sources

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.