International education & training snapshot:

Logan - Beaudesert 2023

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$39.1m — **Gross Value Added** to the Logan - Beaudesert economy by the IET sector in 2023
↑ *77% increase relative to 2022*

225 — **Employment (FTE)** supported by the Logan - Beaudesert IET sector in 2023
↑ *107% increase relative to 2022*

$57.1m — **Export revenue** generated through the Logan - Beaudesert IET sector in 2023
↑ *85% increase relative to 2022*

1,481 — **International student enrolments** in 2023
↑ *69% increase relative to 2022*

International student enrolments and commencements
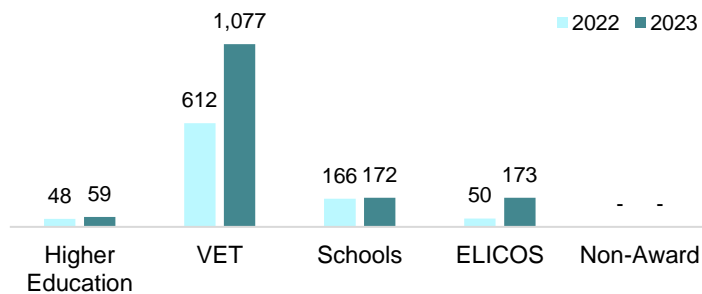
International student enrolments

1,481
enrolments in 2023

In 2023, student enrolments in Logan - Beaudesert (on student visas) totalled 1,481.* **Vocational Education and Training (VET)** remained the largest sub-sector with 1,077 enrolments, followed by the English Language Intensive Courses for Overseas Students (ELICOS) and School sub-sectors (Chart 1).

69%
increase in enrolments 2022 to 2023

Total international student enrolments in Logan - Beaudesert **increased by 69% compared to 2022 levels**. Logan - Beaudesert's ELICOS and VET sectors experienced significant positive enrolment growth of 246% and 76% respectively between 2022 and 2023. All sectors except Non-award recorded positive enrolment growth between 2022 and 2023.

Chart 1: IET enrolments by sub-sector, 2022 and 2023*

Source: Australian Government Department of Education, international student enrolments by SA4, in December of each year. Data as of April 2024 release.

*Due to limited data availability, the 2023 enrolments for the full year (i.e. December YTD) have been extrapolated from October YTD data.

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 55% of total enrolments** as of October 2023 (Table 1).

All of Logan - Beaudesert's top five enrolment source markets, observed positive enrolment growth between October 2022 and 2023.

**Table 1: Enrolments in top five source markets, Oct YTD 2022 to 2023**

	2022		2023		Growth (share)
	Enrolments	Share	Enrolments	Share	
India	438	52%	618	45%	↓
China	78	9%	137	10%	↑
Pakistan	50	6%	130	9%	↑
Hong Kong	53	6%	92	7%	↑
Republic of Korea	39	5%	71	5%	-

Source: Australian Government Department of Education, international student enrolments by SA4. Data as April 2024 release. Enrolments in October of each year.

Source market concentration

Enrolments in Logan - Beaudesert's top five source markets accounted for **76% of the region's international student enrolments** as of October 2023 (Chart 2). Logan - Beaudesert's source market concentration is slightly higher than that of Queensland, where the top five source markets accounted for 51% of international student enrolments.

Chart 2: Source market concentration, 2023
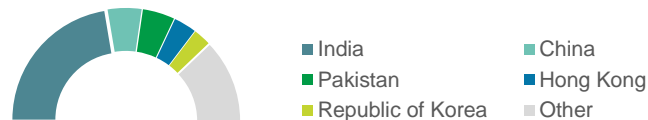
Source: Australian Government Department of Education, international student enrolments by SA4. Data as of April 2024 release. Enrolments in October of each year.
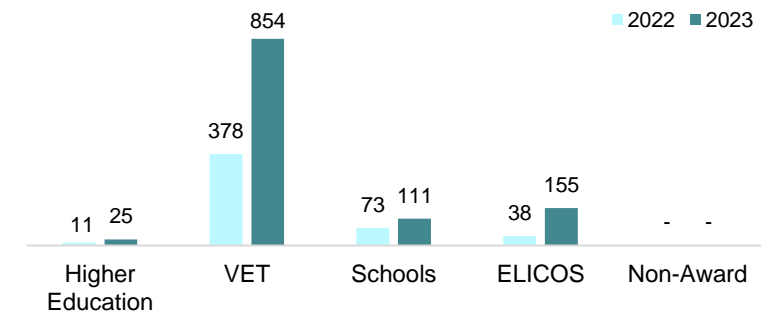
International student commencements

1,145
commencements in 2023

In 2023, student commencements in Logan - Beaudesert (on student visas) totalled 1,145.^ VET remained the largest sub-sector, with **854** commencements, followed by the School sub-sector (Chart 3).

129%
increase in commencements 2022 to 2023

Total international student commencements in Logan - Beaudesert **increased by 129% compared to 2022 levels**. This was driven by positive year-on-year (YOY) growth in all sub-sectors except Non-Award. The ELICOS, HE and VET sub-sectors experienced significant YOY growth of 308%, 128% and 126% respectively between 2022 and 2023.

Chart 3: IET commencements by sub-sector, 2022 and 2023^

Source: Australian Government Department of Education, international student commencements by SA4, in December of each year. Data as of April 2024 release.

^Due to limited data availability, the 2023 commencements for the full year (i.e. December YTD) have been extrapolated from October YTD data.

Notes: (1) The results presented in the charts, tables and analysis 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 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.

Export revenue of the IET sector

Export revenue

$57.1m
Export revenue in 2023

Total export revenue from international student expenditure on tuition fees, goods and services, and visiting friends and relatives (VFR) expenditure totalled $57.1 million in 2023. Logan - Beaudesert remained the eighth largest region of the IET sector, accounting for approximately **0.8% of Queensland's IET export revenue** in 2023. The VET sector made the largest contribution to IET export revenue in Logan - Beaudesert. The sector contributed $37.8 million, which accounted for approximately 66% of IET export revenue in Logan - Beaudesert in 2023.

Overall, Logan - Beaudesert's **IET export revenue increased by 85% from 2022 to 2023** (Chart 4). Export revenue increased at a faster rate than enrolments (69%) due primarily to a large number of students returning onshore and increasing per-student expenditure.

Chart 4: Export revenue growth between 2022 and 2023, by IET sub-sector
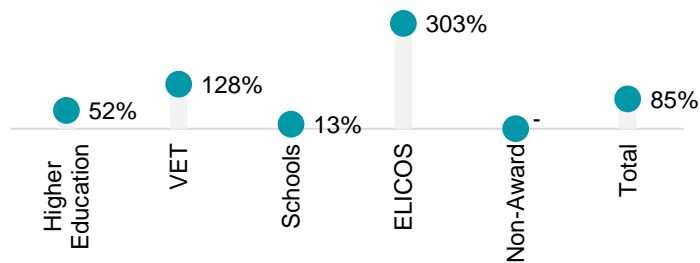
Source: Australian Bureau of Statistics, Australian Government Department of Education, Tourism Research Australia, Deloitte Access Economics estimates.

Between 2022 and 2023, export revenue increased across all IET sub-sectors (Chart 5). The ELICOS and VET sectors observed the largest growth of 303% and 128% respectively in 2023.

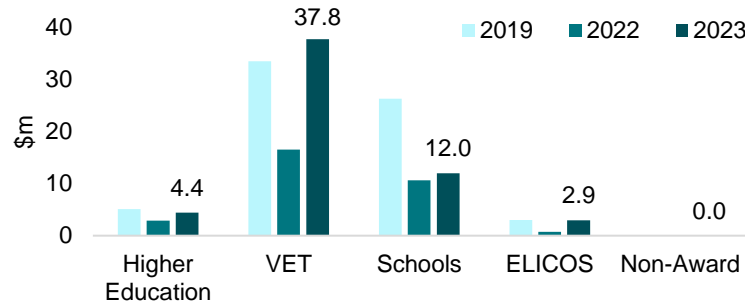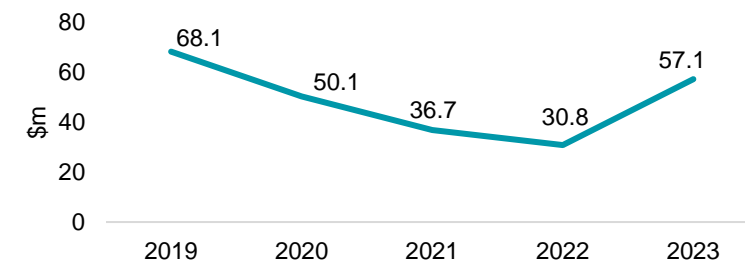**Chart 5: IET export revenue by sub-sector, 2019, 2022-2023 ($m)**

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

Logan - Beaudesert's IET export revenue fell by 16% between 2019 and 2023 (Chart 5). Over the past five years, there has been negative growth in total export revenue in IET sub-sectors except VET.

Chart 6: IET export revenue from 2019-2023 ($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 99% of Logan - Beaudesert's total export revenue (Chart 7). Offshore students and visiting friends and relatives accounted for the remaining IET export revenue in Logan - Beaudesert.

Chart 7: Breakdown of IET export revenue, 2023

- Onshore students
- Offshore students
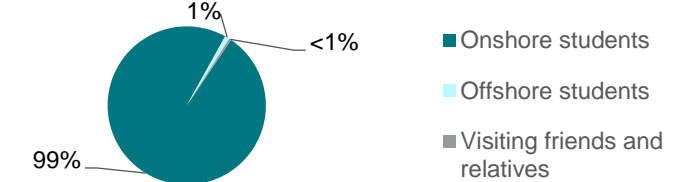- Visiting friends and relatives

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 27 providers operated in Logan - Beaudesert with approximately 193 courses offered to international students. The number of providers is up 13% and courses are up 3% on 2022 levels (Table 2).

Table 2: CRICOS providers and courses, 2022 and 2023

	2022	2023	YOY growth
Providers	24	27	13%
Courses	188	193	3%

The VET sector accounted for approximately two thirds of courses offered in the Logan - Beaudesert region (Table 3).

Table 3: Share of CRICOS courses by IET sector, 2023

	Higher Education	VET	Schools	ELICOS	Non-award
Logan - Beaudesert	20%	63%	10%	6%	1%

Source: Australian Government Department of Education. Deloitte Access Economics estimates. Data current as of 1 December 2023.

^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.

Note: The results presented in the charts, tables and analysis 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.

Economic contribution of the IET sector

Direct economic contribution

The IET sector directly contributed **$22.0 million** and supported **128 full-time equivalent (FTE)** jobs in the Logan - Beaudesert region in 2023 (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, 2022 and 2023

	2022 value-added ($m)	2023 value-added ($m)	Growth in value-added	2022 jobs (FTE)	2023 jobs (FTE)	Growth in jobs
Onshore students	$11.0	$21.6	95%	57	127	121%
Offshore students	$1.9	$0.4	-81%	2	0	-80%
VFRs^	$0.01	$0.06	803%*	0	1	857%*
IET sector	**$13.0**	**$22.0**	**70%**	**59**	**128**	**116%**

Source: Deloitte Access Economics estimates.
Note: The results 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.

Indirect economic contribution

The IET sector also indirectly contributed **$17.1 million** and supported **97 jobs (FTE)** in the Logan - Beaudesert region in 2023 (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, 2022 and 2023

	2022 value-added ($m)	2023 value-added ($m)	Growth in value-added	2022 jobs (FTE)	2023 jobs (FTE)	Growth in jobs
Onshore students	$8.2	$16.8	106%	45	95	110%
Offshore students	$0.9	$0.2	-80%	4	1	-80%
VFRs^	$0.01	$0.07	842%*	0	0	842%*
IET sector	**$9.1**	**$17.1**	**87%**	**50**	**97**	**95%**

Source: Deloitte Access Economics estimates.
Note: The results 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.

^Due to changes in TRA's data collection method, there has been a methodological change in the estimation of IET related VFR expenditure (i.e. export revenue) from 2022 to 2023. VFR data can be highly volatile from year-to-year, meaning that results should be treated with caution.
*VFR activity across Queensland has grown significantly from 2022 to 2023, beginning with export revenue. While the statewide averages for expenditure per night and length of stay (i.e., visitor nights per visitor) have both risen by 46% and 41% respectively, the largest driver of this growth is the number of visitors which is 295% higher in Queensland in 2023 compared to 2022. All three aforementioned factors have contributed to significant growth in export revenue which is a key driver of growth in economic contribution. These trends are reflected in most regions.

Total economic contribution

$39.1m
value added to the Logan - Beaudesert region by the IET sector in 2023

In total, the IET sector contributed **$39.1 million** and supported **225 full-time equivalent (FTE) jobs** in the Logan - Beaudesert region in 2023. This represents an increase of **77%** in total value added contribution, and **107%** in employment from 2022 (Table 6).

Table 6: Growth in economic contribution of the IET sector, 2022 to 2023

Value added	77%
Employment (FTE)	107%

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

Key industries

The most significant industries supporting the IET sector in Logan - Beaudesert were accommodation (34%), cafes, restaurants and takeaway food services (17%) and retail trade (13%) (Table 7). Together, they accounted for 64% of Logan - Beaudesert's direct FTE employment supported by the IET sector.

Table 7: Direct employment breakdown by industry (economic contribution), 2023

Industry	Direct employment (FTE)	Direct employment (%)
Accommodation	44	34%
Cafes, restaurants and takeaway food services	22	17%
Retail trade	17	13%
Road transport and transport equipment rental	10	8%
Education and training	9	7%
Clubs, pubs, taverns and bars	8	6%
Other sports and recreation services	4	3%
Cultural services	2	2%
Air, water and other transport	2	2%
Casinos and other gambling services	1	<1%
Rail transport	1	<1%
All other industries	9	7%

Source: Australian Bureau of Statistics; 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 proportions outlined in the table may not sum to 100% due to rounding.

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. This is the third year in which this methodology has been available to use in the IET context, and hence represents a substantial methodological change to previous years. Tourism Research Australia (TRA) are due to update the model benchmarks in 2024 where it is anticipated that the production structures could shift considerably. This update will have implications for future economic contribution modelling exercises and the results they generate.
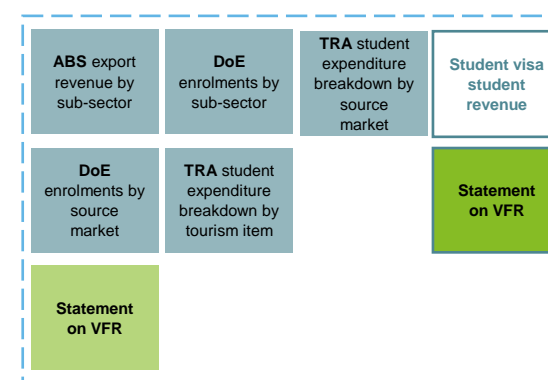
Data sources

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.^

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. The approach to estimating offshore tuition fees has been simplified in 2023, to remove a historical calibration against the proportion of offshore visa holders by sector.

During COVID-19, there were changes in the availability of TRA data (i.e. limited International Visitor Survey (IVS) data was collected), which contributed to methodological changes in the estimation of VFR expenditure over time. In 2023, TRA updated its data collection approach for the IVS, which resulted in reduced sample sizes of key variables in the IVS dataset. There have been methodological updates in the estimation of 2023 VFR expenditure to avoid the risk of small sample sizes and volatility skewing the robustness of the estimates.

State level IET revenue estimate **State level contribution**
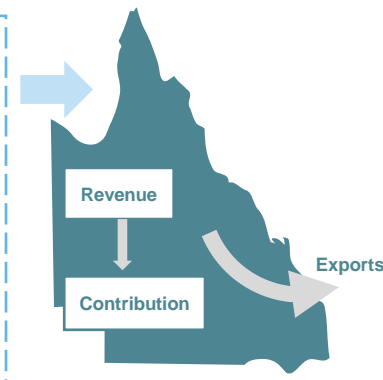
Using economic contribution results

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.

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* Due to limited data availability, the 2023 enrolments for the full year (i.e. December YTD) have been extrapolated from October YTD data.
^ Enrolment and commencement data is updated in each data release, meaning that historical counts may change over time.