

International education & training snapshot:

Queensland 2025

Publication date: July 2026



SQ STUDY
QUEENSLAND



**TRADE +
INVESTMENT**
QUEENSLAND



\$4.83bn

Gross Value Added to the Queensland economy by the IET sector in 2025

↑ 2% higher than 2024



25,458

Employment (FTE) supported by the Queensland IET sector in 2025

↓ 2% lower than 2024



\$6.85bn

Export revenue generated through the Queensland IET sector in 2025

↓ 1% lower than 2024



148,589

International student enrolments in 2025

↓ 6% lower than 2024



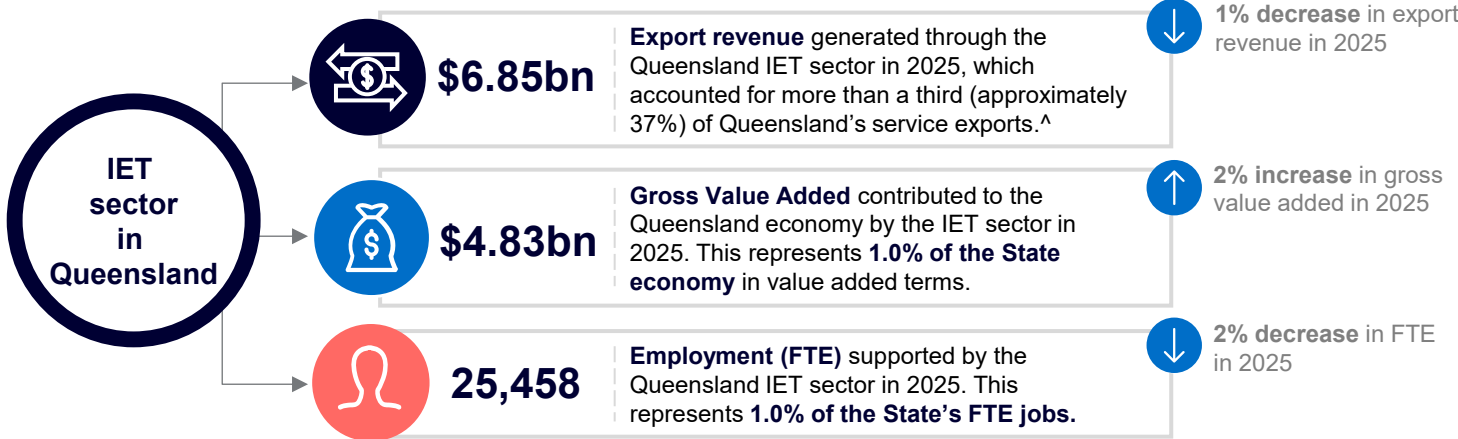
355

CRICOS Providers operating in Queensland in 2025

↓ 4% lower than 2024

International education & training snapshot: Queensland 2025

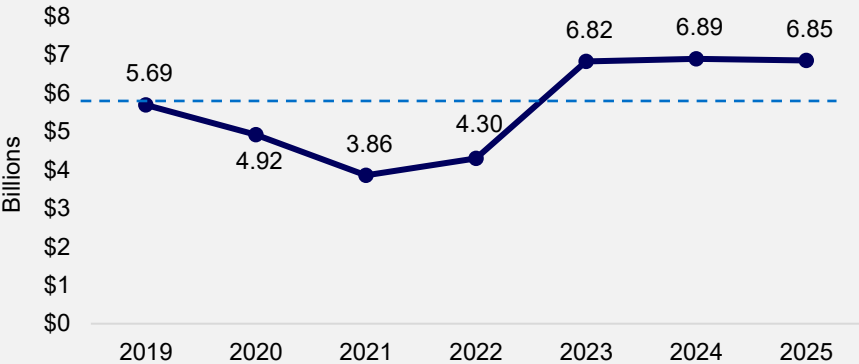
Performance of the sector in 2025



[^] Includes onshore and offshore tuition fees.

Export revenue from 2019 to 2025

Total export revenue in 2025 has stabilised for the third consecutive year following post-pandemic recovery, around 20% above the \$5.69bn recorded in 2019.



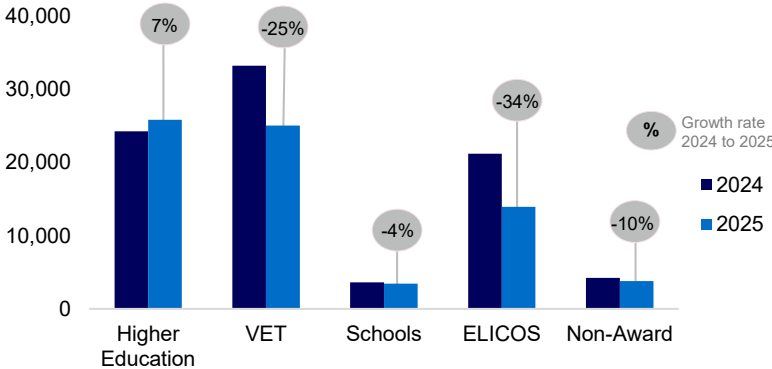
International education and training in Queensland 2025 – at a glance



72,116 international student commencements in 2025

17% lower than 2024

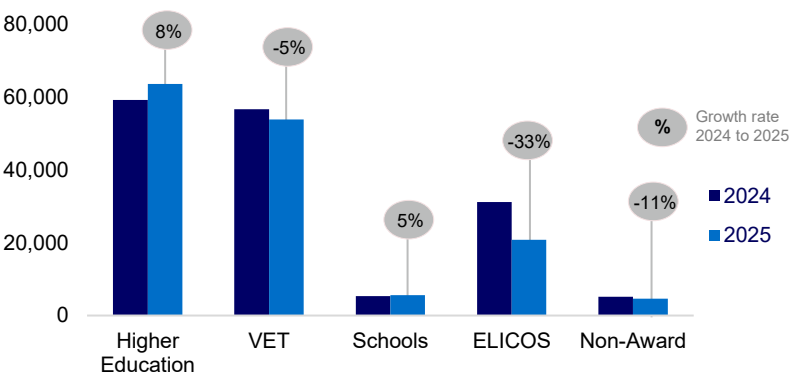
15% of national commencements



148,589 international student enrolments in 2025

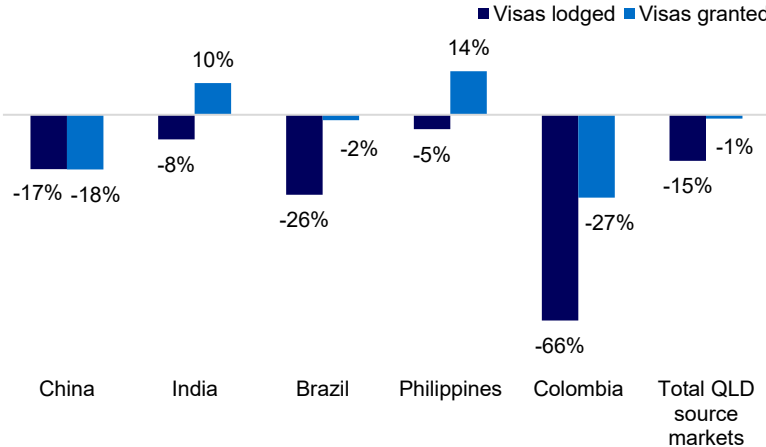
6% lower than 2024

14% of national enrolments



Student visa activity

Visa activity declined across all of Queensland's top enrolment source markets from 2024 to 2025. However, the extent of this decline varied substantially by source market.



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Abbreviations:

IET – International Education and Training

HE – Higher Education

VET – Vocational Education and Training

ELICOS – English Language Intensive Courses for Overseas Students

The Queensland IET Sector

The Queensland International Education and Training (IET) sector is facing global shifts and challenging headwinds including:

- restrictive national policies in response to continued concern over migration, alongside housing and cost of living pressures
- changing international education policy landscape in traditional source markets for Queensland, such as China, which is increasingly being shaped by the uptake of transnational education within the country rather than encouraging the flow of outbound students
- changing source markets driven by demographic and economic growth
- changing student preferences increasingly based on affordability and employment outcomes over ranking, and
- emerging competitors competing on access, relevance, and value, including the expansion of transnational education with offshore campuses delivering global education on location campuses.

Globally, ongoing uncertainty and conflict, and changing policy and geopolitical landscapes presents both challenges and opportunity for international education. While restrictive IET and migration policies by traditional competitors (the UK, Canada and the USA) open opportunities for further growth, these mirror local concerns and dialogue regarding rates of migration, and have also led to the emergence of other destinations as students seek greater affordability, stability and opportunity.

Study Queensland

Study Queensland (SQ), a business unit within Trade and Investment Queensland, is dedicated to promoting Queensland as a premier study destination and a preferred partner for education, training, research and innovation. SQ works with local and global partners to:

1. Promotes Queensland as a leading destination and provider of education, training, research and innovation.
2. Provides market entry, business matching and market intelligence advice and services to Queensland IET providers to support their commercial export outcomes.
3. Delivers programs and services to ensure that Queensland's international students have a quality study experience.
4. Provides policy advice to government and market insights to the sector, both underpinned by research and data analysis.

Queensland's Regions

Queensland has the most regionalised IET sector in Australia. Almost half of Queensland's IET providers are registered outside of Brisbane, and Queensland has the highest proportion of international students studying outside a capital city.

Study Queensland works in close collaboration with five regional study clusters to undertake a wide range of activities in their region, including Student Ambassador programs, regional specific promotional activity, industry events, student events, training, and employability programs to connect students with industry.

SQ will continue to promote the quality and diversity of Queensland's international education and training offerings, world class research and innovation capabilities, and lifestyle options located throughout the state.

National policy landscape

In 2025, the Australian Government introduced a suite of policy reforms aimed at improving the integrity, quality and sustainability of the IET sector, and reducing net overseas migration levels.

This was led by the introduction of a 'National Planning Level' (NPL) to direct provider-level quotas of international students through a visa prioritisation processing mechanism under Ministerial Directive 115, followed by substantial increases in student visa application fees.

The impact of these reforms has increased uncertainty among IET providers and international students and led to a softening in demand for IET across the country, in particular for VET and ELICOS providers.

Noting this document covers trends to 2025, the policy landscape in 2026 has continued to be challenging for the IET sector. The NPL was increased (allowing for some growth), however at the same time visa refusal rates have reached record highs. In response to ongoing quality and integrity concerns, the Minister announced a 12-month suspension on new CRICOS registrations (excluding public providers); reforms to the ESOS framework has increased scrutiny over providers; and a new 'Genuine Student Test' has raised the thresholds for entry for students.

SQ continues to monitor and assess the changing policy and geopolitical landscapes facing the Queensland IET sector, and to advocate at both a state and national level.

International student enrolments

International student enrolments



148,589

enrolments in 2025

↓ 6%

In 2025, international student enrolments in Queensland fell for the first time post-pandemic. Enrolments decreased to **148,589, 6% lower than the previous year**. Despite this fall, enrolments remain slightly above pre-pandemic levels.

As in past years, **Higher Education and VET remained the two largest IET subsectors**, with 63,670 and 53,855 enrolments respectively (Table 1).

Higher Education experienced the greatest growth, up 8% between 2024 and 2025. Although VET remained the second largest subsector for enrolments, growth declined by 5%.

Enrolments in Schools grew by 5% in 2025, following strong growth in 2024 (23%). Conversely, ELICOS enrolments declined by 33% following reforms in the international education sector, such as changes to student visa fees and other migration policies. These reforms were driven by concerns regarding the sector's integrity following exorbitant growth in recent years (110% between 2022 and 2023).

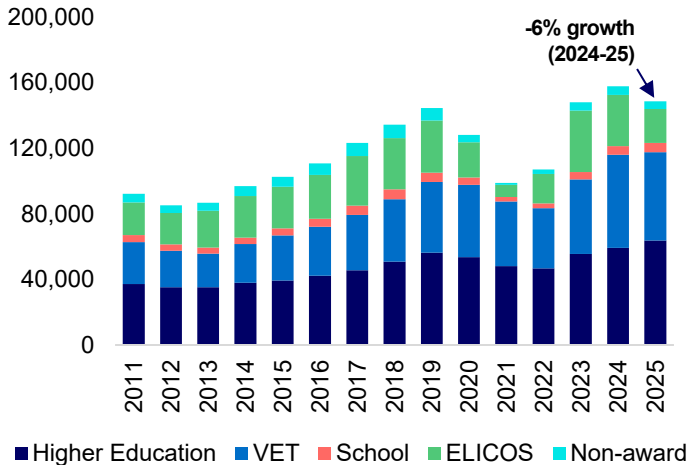
Meanwhile, Non-award subsector enrolments dropped by 11% to 4,600 between 2024 and 2025.

Table 1: Enrolments by subsector, 2024-2025

	2024 enrolments	2025 enrolments	YOY growth
Higher Education	59,219	63,670	8%
VET	56,688	53,855	-5%
Schools	5,380	5,630	5%
ELICOS	31,230	20,834	-33%
Non-award	5,141	4,600	-11%
Total	157,658	148,589	-6%

Source: Australian Government Department of Education, international student enrolment data. Enrolments in December of each year. Data as of April 2025 release.

Chart 1: IET enrolments by subsector, 2011-2025



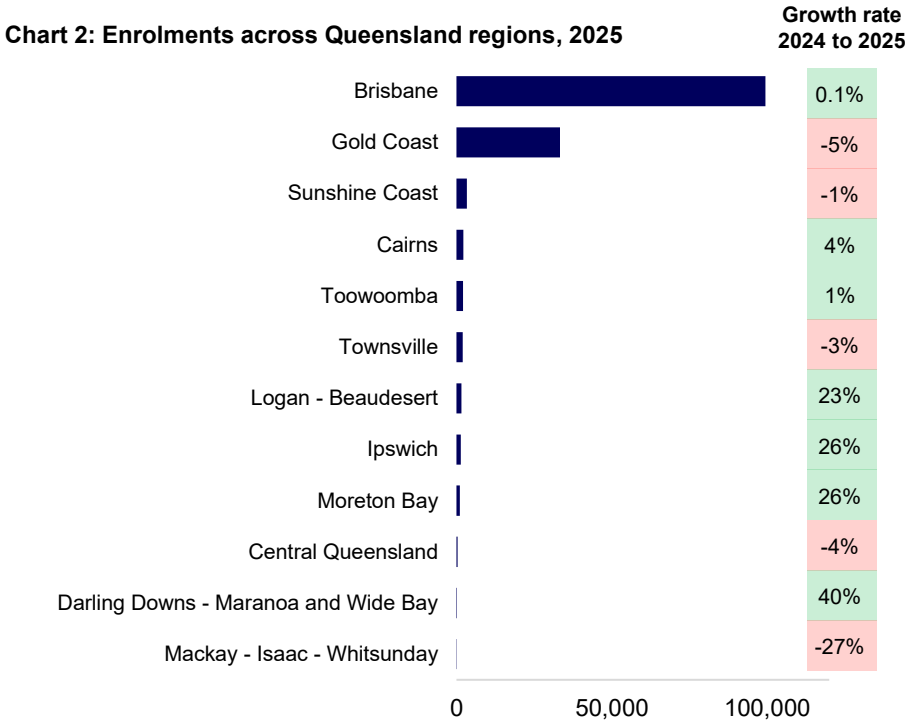
■ Higher Education ■ VET ■ School ■ ELICOS ■ Non-award

Source: Australian Government Department of Education, international student enrolment data. Enrolments in December of each year. Data as of May 2026 release.

Enrolments by region

Brisbane recorded no material change to IET enrolments in 2025, but remained the largest study destination, accounting for approximately 67% of the Queensland's IET enrolments in 2025 (Chart 2)*. Gold Coast, Sunshine Coast, Townsville, and Central Queensland all recorded modest negative growth, while the Mackay – Isaac – Whitsunday region declined by 27%. Some of the remaining (smaller) regions experienced significant enrolment growth, including Ipswich (26%), Moreton Bay (26%), and Darling Downs – Maranoa and Wide Bay (40%).

Chart 2: Enrolments across Queensland regions, 2025



Source: Australian Government Department of Education, international student enrolment data by ABS SA4. Enrolments in December of each year. Data as of May 2026 release.

Notes: *The total used to calculate this 99% share excludes enrolments unallocated to a region (representing 1% of total enrolments). (1) The results presented in the charts, tables and analysis in this document 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 in this document 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.

Enrolments by source market

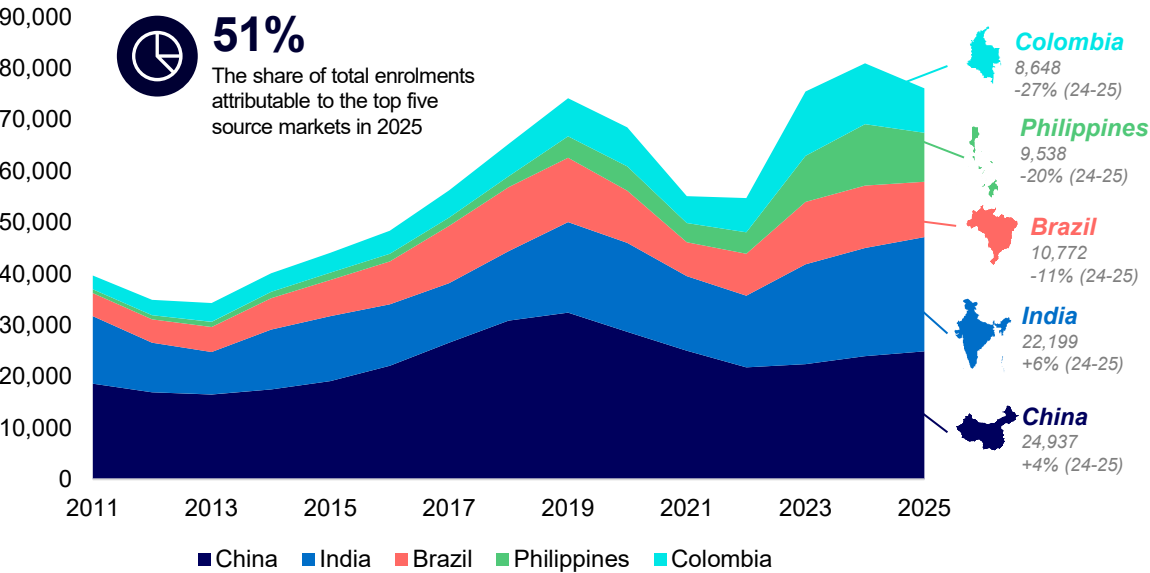
Enrolments by source market

As in previous years, China and India remained Queensland's largest source markets for international student enrolments, with both continuing to record growth in 2025 (Table 2). However, growth has moderated compared with previous years, with enrolments from China increasing by 4% (down from 7% between 2023 and 2024) and enrolments from India rising by 6% (down from 9% between 2023 and 2024).

Brazil, the Philippines and Colombia rounded out Queensland's top five source markets. In contrast to China and India, all three markets recorded declines in enrolments in 2025. Colombia experienced the largest decline (-27%), followed by the Philippines (-20%) and Brazil (-11%).

Enrolments from the top five source markets made up 51% of the state's total. This share has remained largely unchanged since 2022, representing a consistent level of market concentration across this period.

Chart 3: Queensland enrolments in top five source markets, 2011-2025



Source: Australian Government Department of Education, international student enrolment data. Enrolments in December of each year. Data as of May 2026 release.

Table 2: Enrolments in Queensland's top ten source markets, 2025

QLD rank	National rank	Source market	2025 QLD enrolments	2025 QLD market share	Growth in enrolments from 2024
1	1	China	24,937	17%	4%
2	2	India	22,199	15%	6%
3	10	Brazil	10,772	7%	-11%
4	4	Philippines	9,538	6%	-20%
5	6	Colombia	8,648	6%	-27%
6	3	Nepal	5,716	4%	9%
7	17	Japan	4,647	3%	-10%
8	16	Taiwan	4,450	3%	3%
9	14	South Korea	4,446	3%	2%
10	11	Thailand	3,803	3%	-20%
		Other*	49,433	33%	-6%
		Total	148,589	100%	

* Representing enrolments in the remaining 170 countries not shown.
Source: Australian Government Department of Education, international student enrolment data. Enrolments in December of each year. Data as of May 2026 release.

Queensland's top ten enrolment source markets were exclusively from Asian and South American countries. This list remain largely unchanged in 2025, despite some changes in market share within the top 10. Notably, Thailand dropped from eighth to tenth place after a 20% decline in enrolments, and was succeeded by Taiwan and South Korea.

Queensland is the preferred Australian study destination for students from Japan, South Korea and Taiwan, attracting a larger share of enrolments from these markets than the national average. Consistent with this, all three countries are among Queensland's top 10 source markets but fall outside Australia's national top 10.

Concentration of enrolments

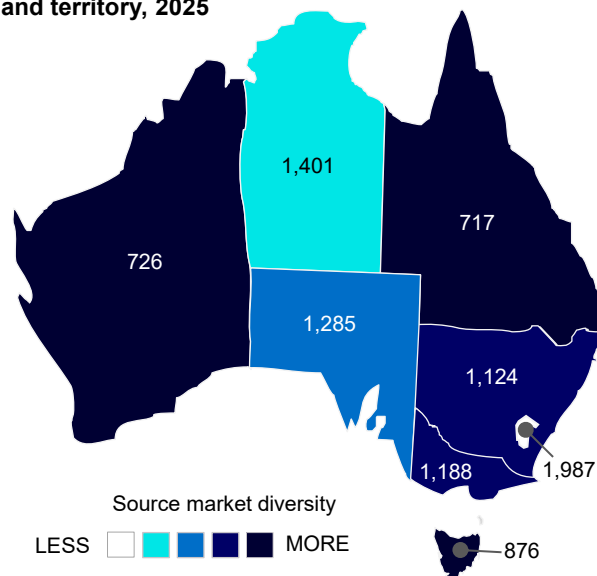
Source market concentration

Deloitte Access Economics measures the degree of enrolment source market concentration within a region using a concentration index.* More diverse sectors can make the region more resilient to shocks in the global market.

Queensland remains the most diverse IET sector in Australia, with a concentration index score of 717 in 2025 (Figure 1). Western Australia is the second most diverse state (726), followed by Tasmania (876). Changes in market concentration varied across other jurisdictions, from the Northern Territory becoming less diverse (by 133 points), while Tasmania's diversity index score increased by 19 points.

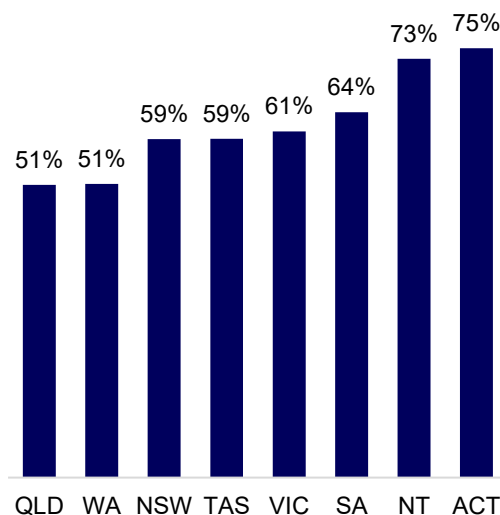
The combined share of the top 5 source markets in each state also provides a useful reference for examining source market concentration. Queensland's top five source markets represent 51% of the State's IET enrolments – the equal lowest in the country alongside Western Australia. (Figure 2).

Figure 1: Source market concentration index by state and territory, 2025



Source: Deloitte Access Economics

Figure 2: Proportion of enrolments from top 5 source markets by state, 2025



Source: Australian Government Department of Education. Data as of May 2026 release.

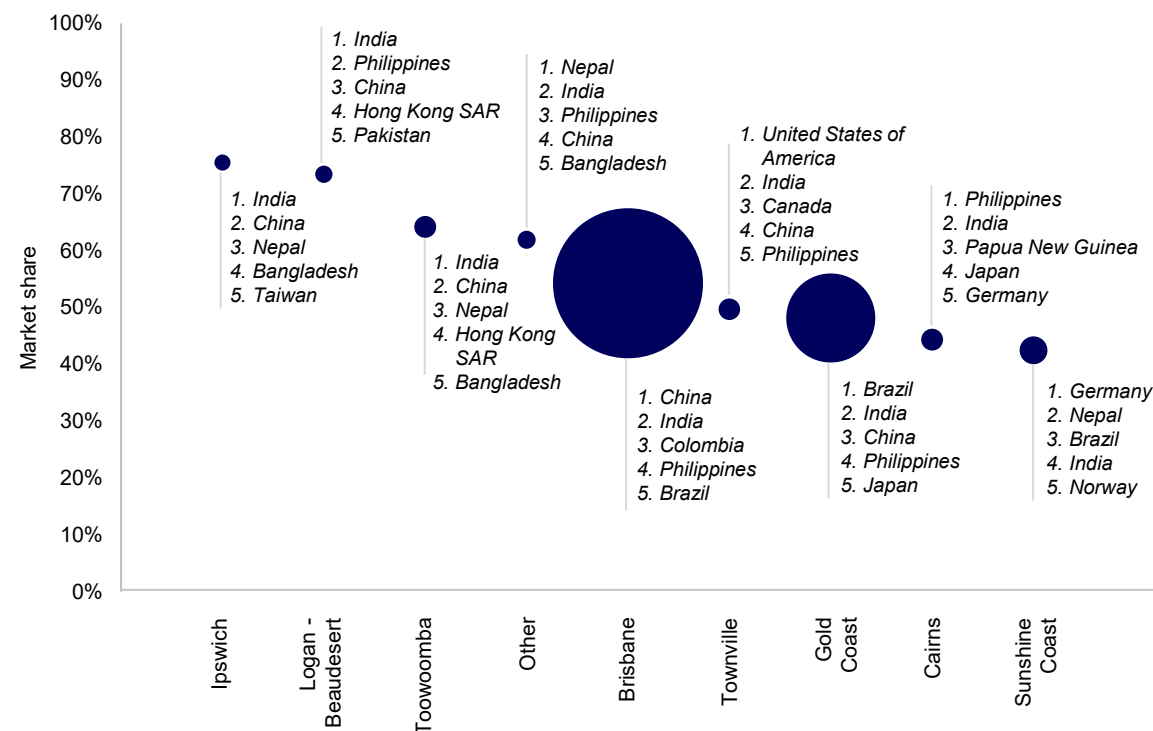
Note: *This index is calculated using a Herfindahl-Hirschman Index approach. This is a commonly used approach for measuring concentration and diversity (in any setting), and here is defined as the sum of squares of the source market shares (percentages) of enrolments. The index range from 0 to 10,000, where a lower index value is more diverse, whereas a higher index value is less diverse.

Regional concentration

Source market concentration varied significantly across Queensland's regions. Chart 4 displays the top 5 enrolment source markets and their concentration for selected Queensland regions. The size of the bubbles represents the size of each region by total enrolments.

In 2025, Ipswich and Logan - Beaudesert remained as the most concentrated regions, with 76% and 71% of IET enrolments from their top five source markets, respectively. The Sunshine Coast, Cairns, and the Gold Coast derived less than 50% of their enrolments from their top five source markets, making them the most diverse markets in the state.

Chart 4: Cumulative enrolment market share of top five source markets, by region, 2025



Source: Australian Government Department of Education, international student enrolment data by ABS SA4. Enrolments for the smallest regions (including Central Queensland, Darling Downs - Maranoa & Wide Bay, Mackay - Isaac - Whitsunday, and Moreton Bay) are only available in a combined "Other Queensland Regions" category and are reported accordingly.

International student commencements

International student commencements



71,223

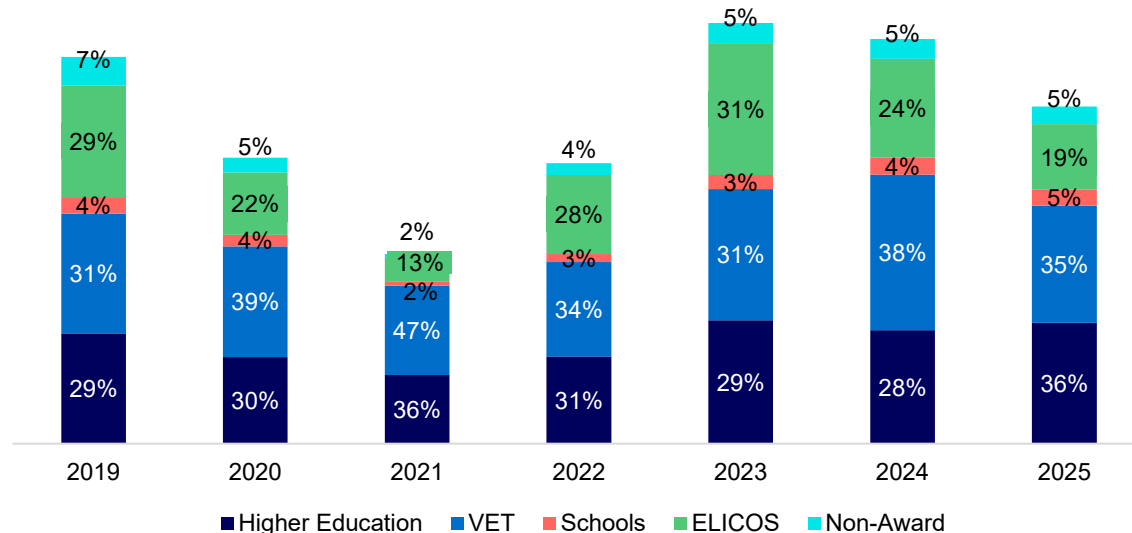
commencements in 2025

In 2025, Queensland's IET commencements totalled 71,223 – down by 11% from 2024. This represented 15% of all Australian commencements, and 49% of total Queensland enrolments (55% in 2024). New student commencements have softened, falling back below pre-pandemic levels for the first time since 2022, likely reflecting the first year of national planning levels.

The reduction in commencements was largely driven by a decline in ELICOS (-25%) and Higher Education (-7%). Commencements increased for the VET and Schools subsectors, up 19% and 21% respectively from the previous year.

The composition of international student commencements across subsectors shifted slightly in 2025, with the share of Higher Education commencements rising by 8 percentage points (Chart 5). Meanwhile, the share of VET commencements and ELICOS declined by 3 percentage points and 5 percentage points, respectively.

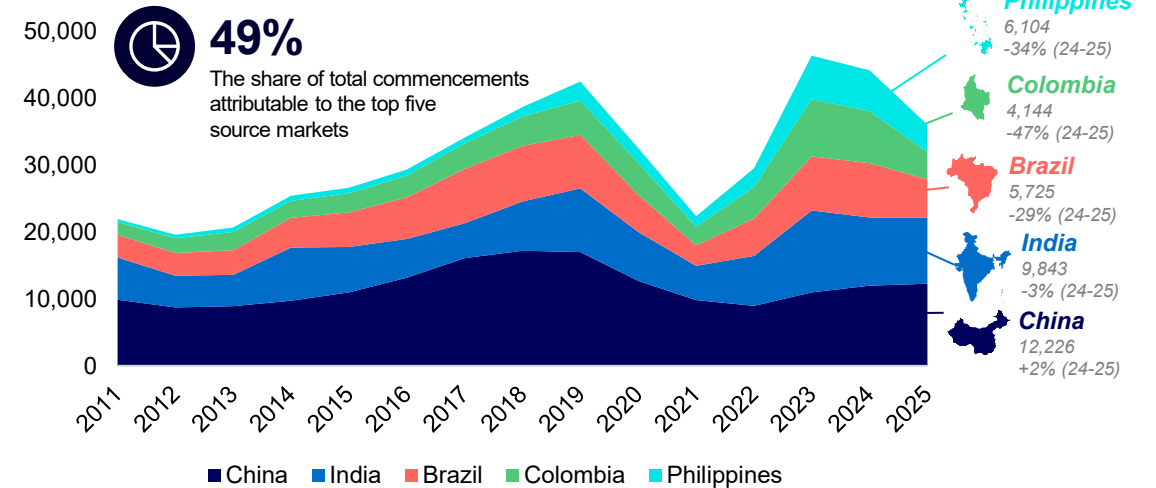
Chart 5: Commencements by subsector, 2019-2025



Source: Australian Government Department of Education, international student commencement data. Commencements in December of each year. Data as of May 2026 release.

Commencements by source market

Chart 6: Queensland commencements in top five source markets, 2011-2025



Source: Australian Government Department of Education, international student commencement data. Commencements in December of each year. Data as of May 2026 release.

As in 2024, Queensland's top five commencement source markets for 2025 were China, India, Brazil, Colombia and the Philippines. Together, these accounted for 50% of the state's IET commencements in 2025 (Chart 6).

China remained as Queensland's largest source of commencements in 2025, with a 2% growth rate. In contrast, India saw a 3% in 2025, off the back of a 17% decline in the previous year.

Across the remaining top source markets, growth contracted this year, reflecting the series of government reform, student visa fees and other migration policy changes.[^] India recorded a moderate decrease (-2%), while Colombia and the Philippines declined by 47% and 34% respectively. These declines follows a period of exceptional recovery between 2022 and 2023, when Colombia surged by 83%, Brazil by 44%, and the Philippines by 131%.

[^] Refer to Chart 10 on page 10.

Commencements by region

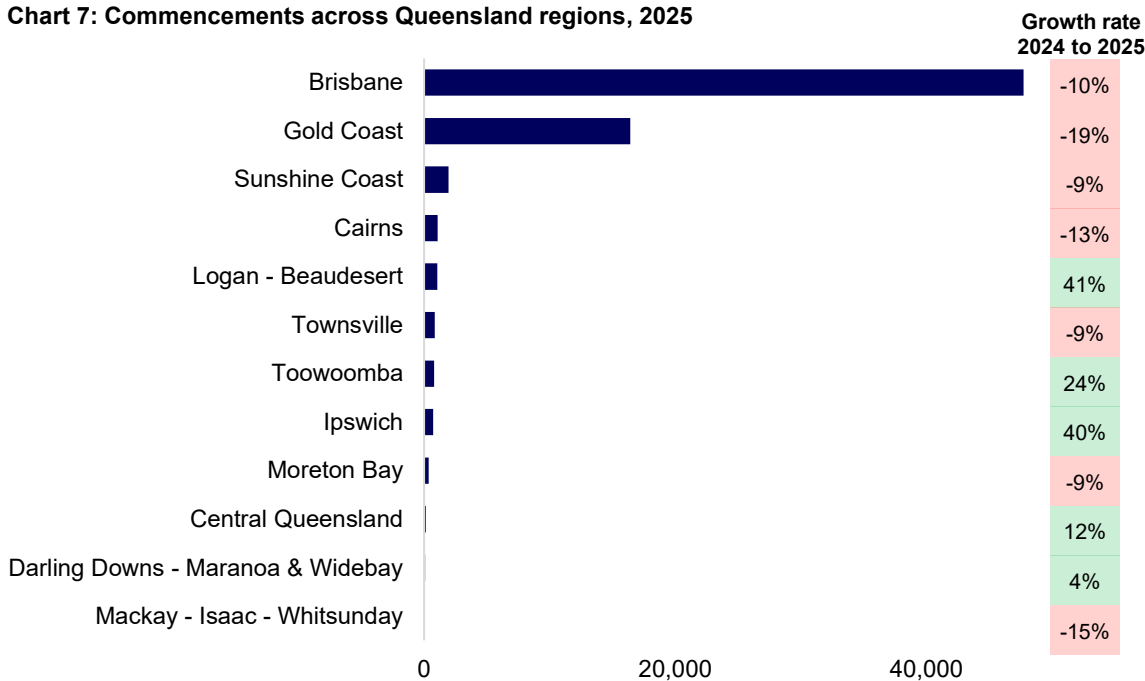
Commencements by region

The decline in commencements (-17%) between 2024 and 2025 was driven by falling enrolments across seven of Queensland’s 12 regions (Chart 7). The downturn was concentrated in Brisbane and the Gold Coast, which together account for around 90% of all commencements in Queensland. Commencements in these regions fell by 10% and 19%, respectively, contributing substantially to the statewide decline.

Among the remaining regions, commencements also declined in the Sunshine Coast (-9%), Cairns (-13%), Townsville (-9%), Moreton Bay (-9%), and Mackay - Isaac - Whitsunday (-15%).

Meanwhile, several smaller regions recorded strong commencement growth in 2025. Logan–Beaudesert experienced the largest increase in commencements (41%), followed by Ipswich (40%), and Toowoomba (24%). More moderate increases were observed in Central Queensland (12%) and Darling Downs - Maranoa and Wide Bay (4%).

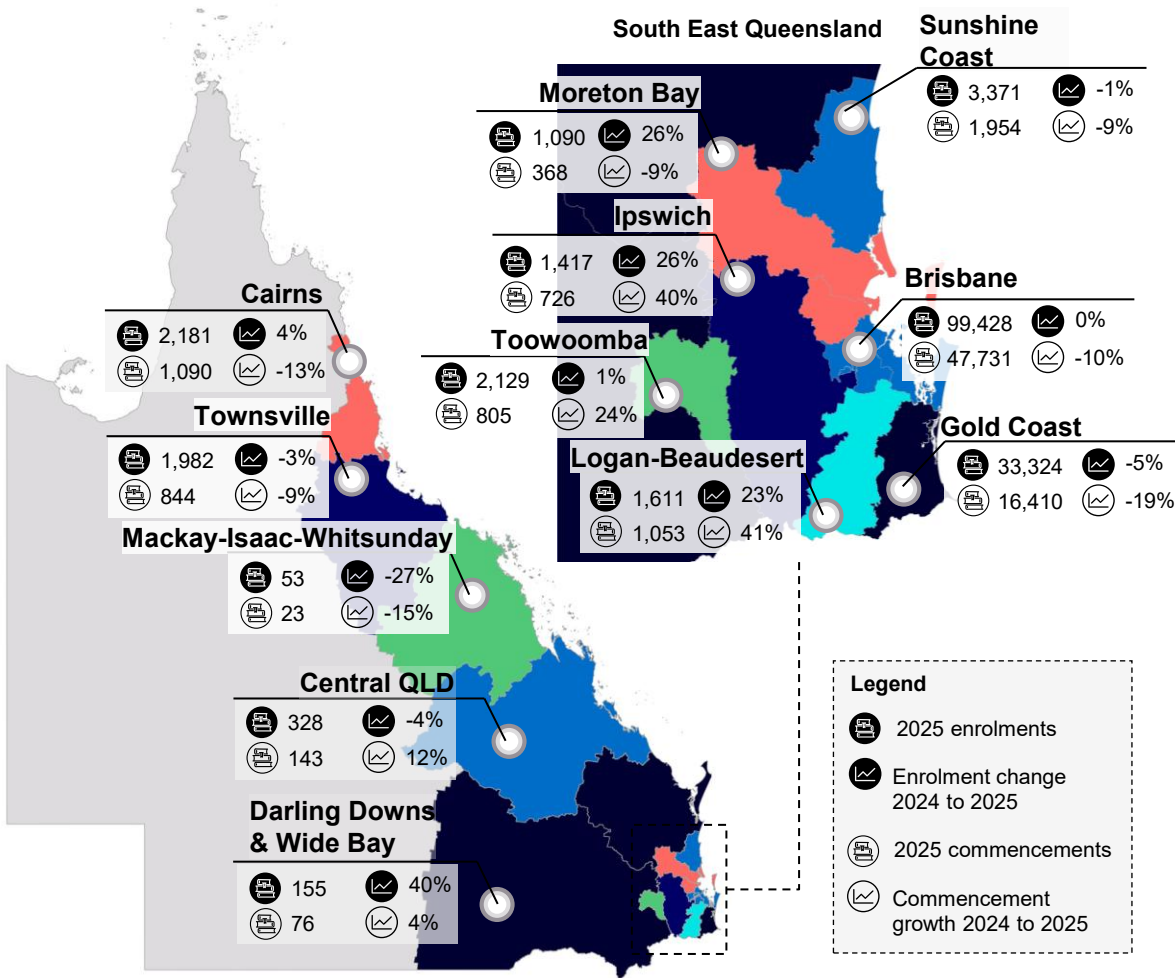
Chart 7: Commencements across Queensland regions, 2025



Source: Australian Government Department of Education, international student commencement data by ABS SA4. Commencements in December of each year. Data as of May 2026 release.

Regional enrolments and commencements summary

Figure 3: IET total enrolments and commencements by region, 2025



Source: Australian Government Department of Education, international student enrolment and commencement data by ABS SA4. Data as of May 2026 release. Results may not sum to values listed elsewhere as 1,520 Queensland enrolments and 893 commencements are unallocated to a specific region.

Visa activity

Visas lodged and granted

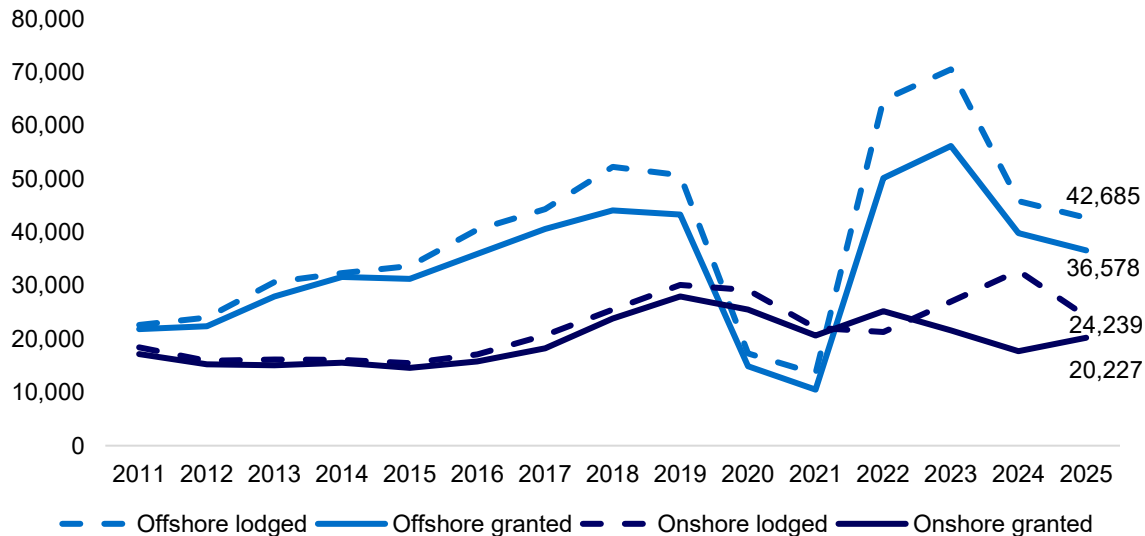
Student visa applications are a lead indicator of international student enrolments and commencements. The total number of lodged student visas continued to decline by 15% to 66,954 in 2025, following a sharp decline in 2024. However, the total number of granted visas remained fairly stable at 56,805 (-1%).

As a result, the state's grant rate rose to 85%, following its lowest point on record in 2024 (75%). The 2025 rate is slightly below the 87-88% range observed consistently between 2018 and 2022.¹

This marks a clear realignment with longer-term growth trends and signals a cooling in the international education pipeline, alongside recent government reforms, following significant growth in the post-COVID recovery period. The slightly downward but stable trends are also consistent with the broader policy tightening and increased scrutiny facing the IET sector in recent times.

Historically, offshore visa applications have been the larger channel compared with onshore visa applications, as most students apply for their visa before coming to Australia. This distribution has continued in 2025 but has narrowed slightly with onshore grants growing by 14% while offshore grants fell by 8%. Onshore visas now represent 36% of total visas granted (Chart 8).

Chart 8: Queensland student visas lodged and granted by location, 2011-2025

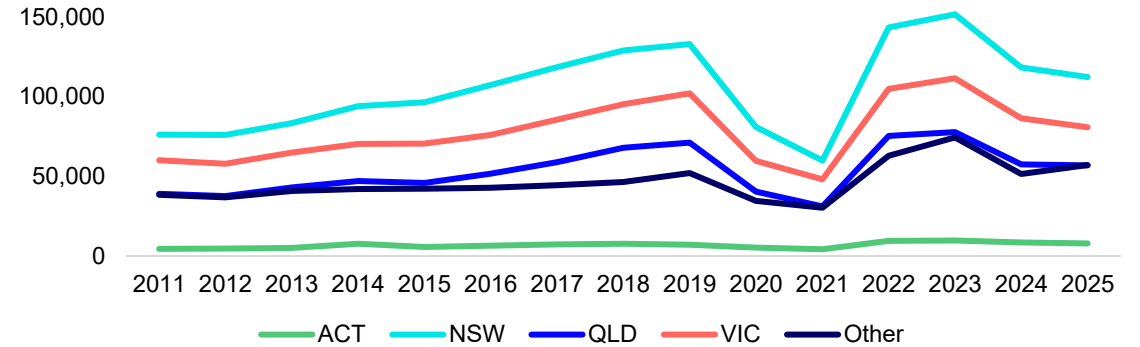


Source: Department of Home Affairs: Student Visa Program. Primary applicant visas. Data as of April 2026.

¹ This rate is calculated as total visas granted divided by total visas lodged.

Queensland continues to be the third-largest Australian destination for international student visas. Queensland experienced a 1% decline in Student visa grants in 2025, which was a more modest fall than key competitors New South Wales (-5%) and Victoria (-7%).

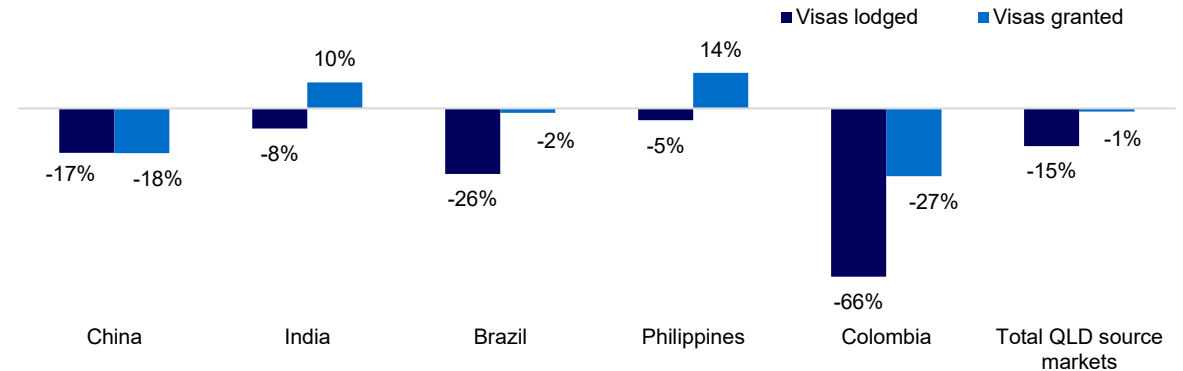
Chart 9: Visas granted across Australian jurisdictions, 2011-2025



Source: Department of Home Affairs: Student Visa Program. Primary applicant visas. Data as of April 2026.

Visas grants from Queensland's top five enrolment source markets grew at varying rates between 2024 and 2025 (Chart 10). Growth was strongest among key source market India (10%) and the Philippines (14%). Notably, China recorded a significant decline (-18%) in visa grants, consistent with a broader shift towards TNE and domestic study. Colombia (-27%) also recorded a significant declines in visa grants.

Chart 10: Growth rates in Queensland student visas lodged and visas granted from 2024 to 2025 in the top five enrolment source markets



Source: Department of Home Affairs: Student Visa Program. Primary applicant visas. Data as of April 2026.

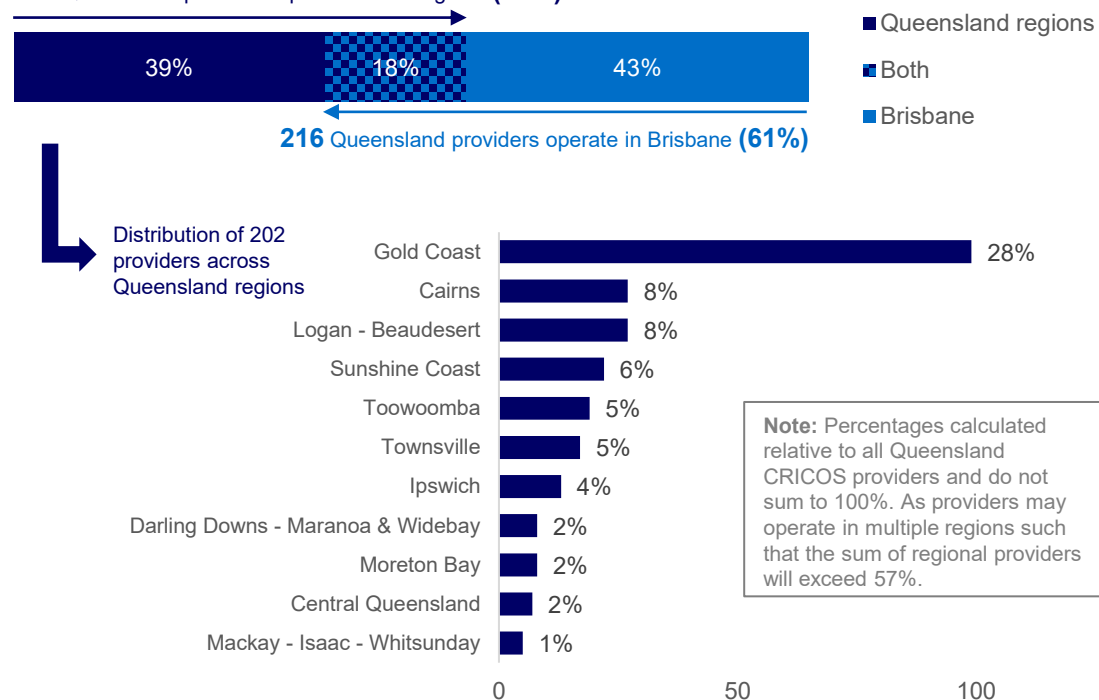
CRICOS providers and courses

CRICOS providers

In 2025, there were **355 unique CRICOS education providers operating in Queensland*** - 13 fewer than in 2024. The majority of these providers (57%) operate in the regions (Chart 11).

Chart 11: Proportion of unique providers operating in Queensland regions in 2025

202 Queensland providers operate in the regions (**57%**)

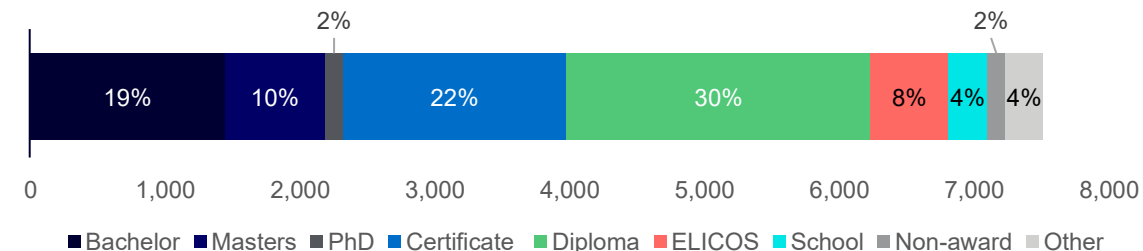


Source: Australian Government Department of Education. Data as of December 2025.

It is estimated that these providers offered 6,488 courses statewide, down 11% from 2024 levels.[^] This represents some further consolidation in the number of different courses offered compared to previous years, likely reflecting recent national reforms.

The decline was similar in most regions but notably larger in regional centres such as Mackay - Isaac - Whitsunday (-35%), Central Queensland (-28%), and Darling Downs - Maranoa and Wide Bay (-23%), and notably smaller in Logan - Beaudesert (-2%). CRICOS courses offered in Queensland are relatively diverse by level of qualification, with Diplomas (30% of total), Certificates (22%), and Bachelors (19%) the leading categories (Chart 12).

Chart 12: Queensland CRICOS courses by qualification type, 2025



Source: Australian Government Department of Education. Data as of December 2025

In 2025, Higher Education providers accounted for 45% of all courses in Queensland (+1% from 2024), by far the lowest of all jurisdictions (Table 3). Queensland had the highest proportion of ELICOS courses (8%) and the joint highest proportion of VET courses (39%), alongside the Northern Territory.

Table 3: Share of CRICOS courses by sector across jurisdictions, 2025

	QLD	NSW	VIC	SA	WA	ACT	TAS	NT
HE	45%	53%	51%	57%	52%	59%	53%	54%
VET	39%	38%	38%	24%	31%	28%	38%	39%
ELICOS	8%	6%	6%	3%	4%	3%	2%	2%
School	6%	2%	3%	12%	10%	8%	6%	3%
Non-award	2%	2%	2%	4%	2%	2%	1%	2%

Source: Australian Government Department of Education. Data as of December 2025.

*The Commonwealth Register of Institutions and Courses for Overseas Students (CRICOS) data is used to estimate the number of providers and courses. 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. [^] Courses are only counted once per region.

Export revenue

Export revenue



\$6.85bn

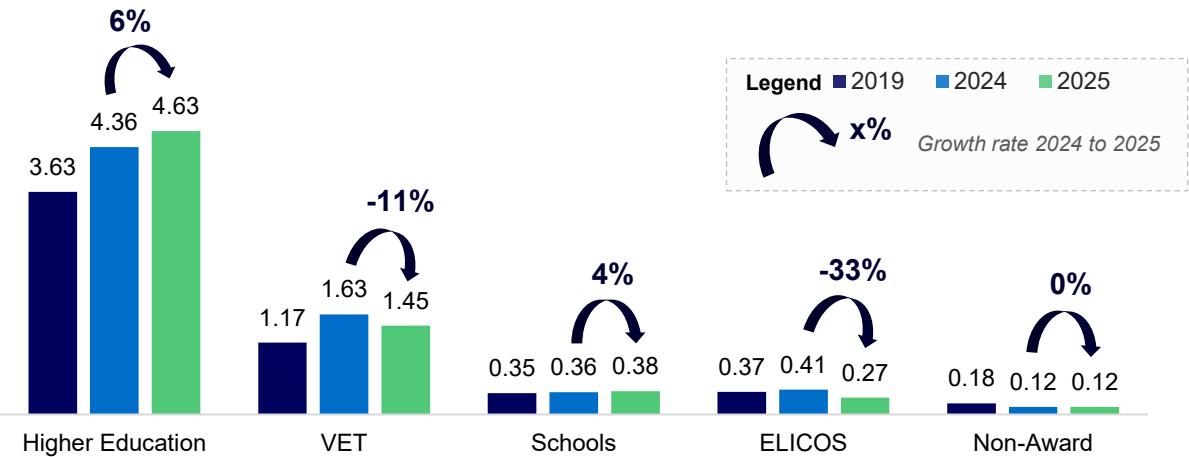
export revenue from onshore and offshore students and visiting friends and relatives

Queensland's IET sector export revenue totalled **\$6.85 billion in 2025***, which accounted for 37% of Queensland's services exports (down from 46% in 2023 and 41% in 2024). The Higher Education sector made the largest contribution to export revenue (67%), followed by VET (21%), Schools (6%), ELICOS (4%), and Non-Award (2%) (Chart 14).

↓ 1%

Queensland's IET export revenue decreased by 1% between 2024 and 2025. This was driven by a significant decrease in the ELICOS (-33%) and VET (-11%) subsectors, and smaller growth in the Higher Education (6%) and Schools subsectors (4%) (Chart 13).

Chart 13: IET export revenue by subsector, 2019, 2024-2025



Source: Deloitte Access Economics estimates using data from the Australian Bureau of Statistics, Australian Government Department of Education, and Tourism Research Australia.

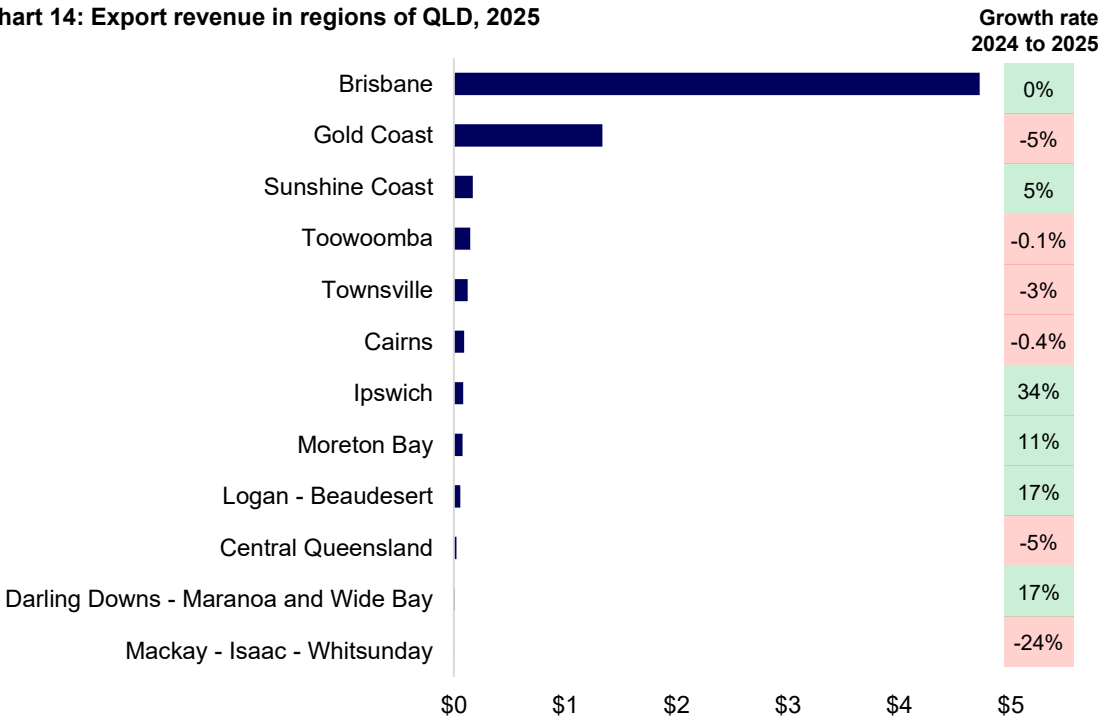
* Export revenue estimates capture the export revenue of international students on student visas and their visiting friends and relatives

Regional breakdown

As in 2024, **Brisbane and the Gold Coast** remained the two largest regions of the Queensland IET sector, accounting for **88% of IET export revenue** in 2025 (Chart 14).

Export revenue grew in 5 of 12 regions in 2025, though growth rates varied widely. Ipswich and Logan - Beaudesert, and Darling Downs - Maranoa and Wide Bay saw the strongest growth, up 34% and 17% (both regions), respectively. Of the regions who recorded a decline, Mackay - Isaac - Whitsunday experienced a steep decline, followed by more minor declines in Central Queensland (-5%), the Gold Coast (-5%), and Townsville (-3%). Brisbane remained the largest source of export revenue, although growth was effectively flat between 2024 and 2025 (0.01%).

Chart 14: Export revenue in regions of QLD, 2025



Source: Deloitte Access Economics estimates using data from the Australian Bureau of Statistics, Australian Government Department of Education, and Tourism Research Australia.

Export revenue breakdown

Onshore student export revenue



\$6.80bn

in onshore export revenue in 2025

Onshore student export revenue (i.e. expenditure on goods and services and onshore tuition fees) totalled **\$6.80 billion in 2025** - reflecting a **1% decrease on 2024 levels** (Table 4).

This flat overall result masks a meaningful fall of 10% in onshore expenditure on goods and services (the largest component of export revenue) and a corresponding rise of 13% in tuition fees between 2024 and 2025. This is broadly consistent with trends in these two revenue categories at the national level where tuition fee growth is much greater than growth in goods and services spending. Goods and services now represent about 54% of onshore student export revenue while tuition fees account for the other 46% (Chart 15).

Apart from this rise in education services (tuition fees) compared with other goods and services spending, the composition of onshore student expenditure across industries remained largely unchanged from 2024. Onshore students continued to spend more than two-thirds (69%) of their expenditure on education and accommodation services (Figure 4).

Figure 4: Onshore student export revenue by goods and services, 2025



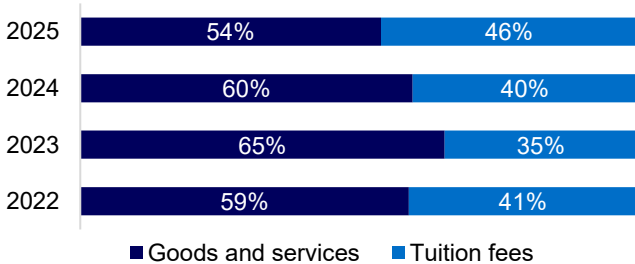
Source: Deloitte Access Economics estimates using data from the Australian Bureau of Statistics and Tourism Research Australia.

Table 4: Onshore student export revenue, 2024-2025

	2024 onshore export revenue (\$bn)	2025 onshore export revenue (\$bn)	Growth (%)
Goods and services	\$4.09	\$3.69	-10%
Tuition fees	\$2.76	\$3.11	13%
Total	\$6.85	\$6.80	-1%

Source: Deloitte Access Economics estimates using data from the Australian Bureau of Statistics, and the Australian Government Department of Education.

Chart 15: Onshore student export revenue by expenditure category, 2022-2025



Source: Deloitte Access Economics estimates using data from the Australian Bureau of Statistics, and the Australian Government Department of Education.

Offshore student export revenue



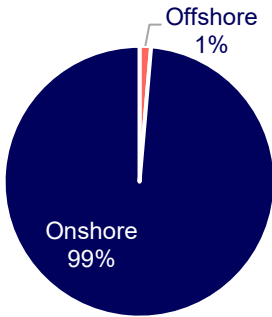
\$43.0m

in offshore export revenue in 2025

Estimated offshore student expenditure (i.e. offshore tuition fees) totalled \$43 million in 2025, representing a 13% increase from 2024. This followed a significant decline of 60% between 2023 and 2024, which largely reflected changes in student location, as a greater proportion of international students returned onshore in 2024.

Further, this shift reflects the change in the composition of onshore and offshore tuition fees, with only 1% of tuition fees incurred offshore in 2024, 3 percentage points lower than 2023 levels (Chart 16).

Chart 16: Tuition fee export revenue by student location, 2025



Source: Deloitte Access Economics estimates using data from the Australian Bureau of Statistics, Australian Government Department of Education and the Australian Government Department of Home Affairs.

Notes: Onshore tuition fee export revenue is estimated using ABS international trade data and offshore export revenue (i.e. offshore tuition fees) is estimated using ABS correspondence course data.

Export revenue from visiting friends and relatives

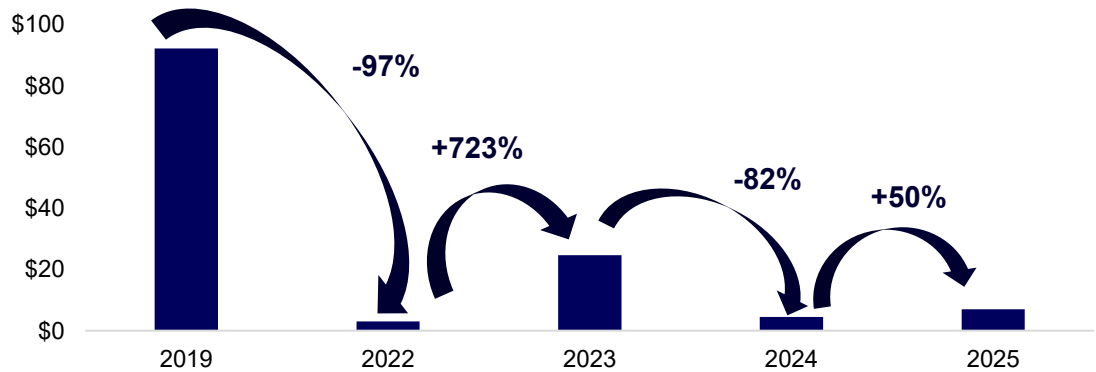
Visiting friends and relatives

 **\$7m***
in export revenue from visiting friends and relatives in 2025

Tourism Research Australia data indicates that in 2025, over 5,700 visitors stayed for approximately 79,000 nights for the purpose of visiting an international student relative or friend in Queensland. While total visitors fell by 19% between 2024 and 2025, total visitor nights rose by 56%.

Export revenue from international students visiting friends and relatives (VFR) was estimated at **\$7.0 million in 2025**, representing a **50% increase on 2024 levels**. This **follows a significant decline of 82% between 2023 and 2024**, which came after a sharp rebound of 715% from \$3.0 million in 2022 to \$24.7 million in 2023. While VFR-related spending in 2025 is still 133% higher than 2022 levels, it's less than 10% of pre-pandemic levels, which stood at \$92.2 million in 2019 (Chart 17).

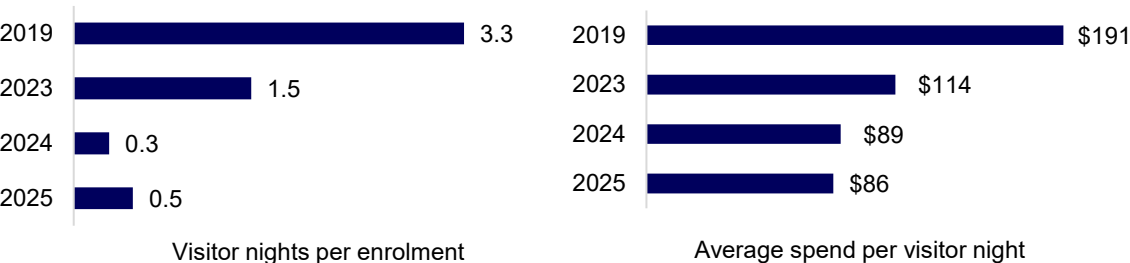
Chart 17: QLD IET VFR export revenue, 2019, 2023-2025 (\$m)



Source: Deloitte Access Economics using data from Tourism Research Australia.

Despite a 67% growth in visitor nights per enrolments between 2024 and 2025, there has been a significant decline since 2019 (-85%) (Chart 18). Although there was growth in the night stayed average spend per night declined by 4%, and reflects broader declines since 2019 (-55%). This decline after a surge in 2023 may reflect persistent global economic and geopolitical uncertainty, as well as continued uncertainty and disruption in visa policy settings.

Chart 18: Visitor nights per enrolment (left) and average spend per night (right), 2019, 2023-2025

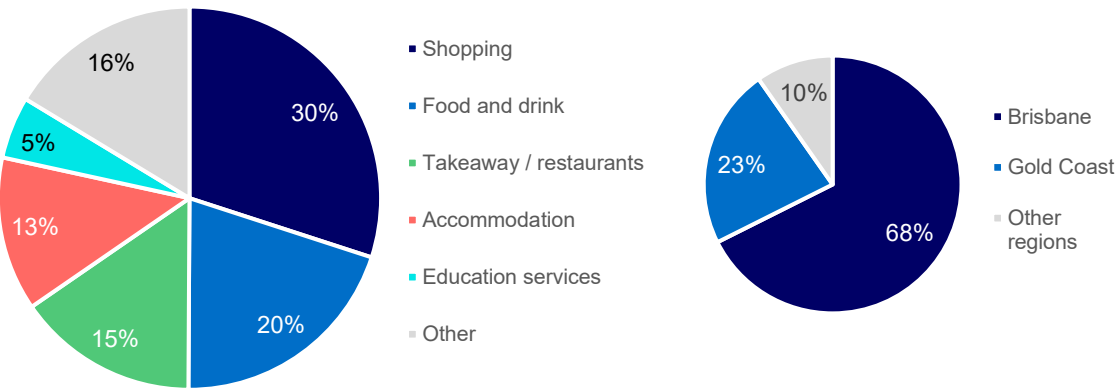


Source: Deloitte Access Economics estimates using data from Tourism Research Australia and the Australian Government Department of Education.

Shopping (including gifts and souvenirs) accounts for the largest proportion of VFR expenditure, followed by food, alcohol, and other beverage products, takeaway and restaurant meals, and accommodation services (Chart 19).

As the estimated regional allocation is based on enrolment share, most spending is concentrated in Brisbane and the Gold Coast.

Chart 19: VFR export revenue by industry (left) and region (right), 2024



Source: Deloitte Access Economics estimates using data from Tourism Research Australia and the Australian Government Department of Education.

*This estimation is based on available Tourism Research Australia data. This data is volatile meaning that actual VFR expenditure may be different than the estimated value.

Contribution of the IET sector

Direct economic contribution

The direct economic contribution represents the value of economic activity associated with businesses that directly supply goods and services to international students and their visitors. In 2025, the IET sector directly contributed **\$2.85 billion** to the Queensland economy and supported **14,896 full-time equivalent (FTE)** jobs in 2025 (Table 5).

Table 5: Direct economic contribution of the IET sector, 2024-2025

	2024 value-added (\$bn)	2025 value-added (\$bn)	Growth in value-added	2024 jobs (FTE)	2025 jobs (FTE)	Growth in jobs
Onshore students	\$2.74	\$2.83	3%	15,412	14,853	-4%
Offshore students	\$0.02	\$0.02	13%	18	21	14%
VFRs	\$0.001	\$0.002	42%	13	22	74%
IET sector	\$2.76	\$2.85	3%	15,443	14,896	-4%

Source: Deloitte Access Economics estimates.

Indirect economic contribution

The indirect economic contribution represents the flow-on effects for industries that supply goods and services to the IET sector, such as maintenance services supplied to training providers and the agricultural producers that supply to restaurants. The IET sector indirectly contributed **\$1.97 billion** and supported **10,562 FTE** jobs to Queensland in 2025 (Table 6).

Table 6: Indirect economic contribution of the IET sector, 2024-2025

	2024 value-added (\$bn)	2025 value-added (\$bn)	Growth in value-added	2024 jobs (FTE)	2025 jobs (FTE)	Growth in jobs
Onshore students	\$1.96	\$1.96	-0.1%	10,549	10,503	-0.4%
Offshore students	\$0.01	\$0.01	13%	41	46	14%
VFRs	\$0.001	\$0.002	57%	8	13	63%
IET sector	\$1.97	\$1.97	0%	10,597	10,562	-0.3%

Source: Deloitte Access Economics estimates.

Total economic contribution

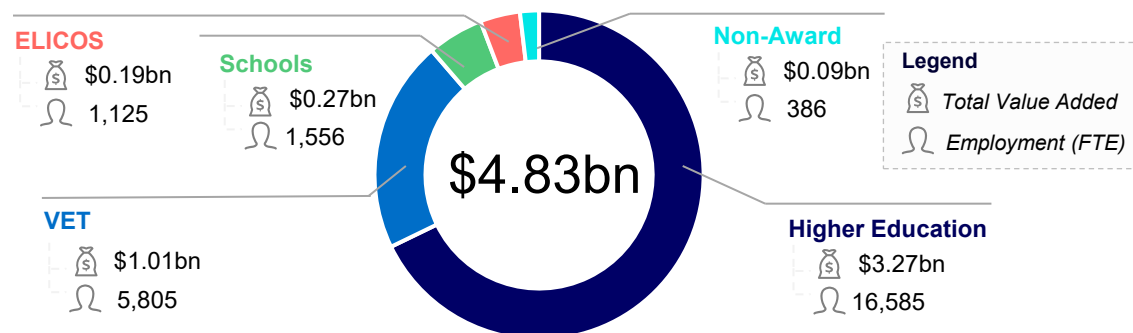


\$4.83bn

value added contributed to the Queensland economy by the IET sector in 2025

In total, the IET sector contributed **\$4.83 billion** to the Queensland economy and supported **25,458 full-time equivalent (FTE)** jobs in 2024 (Table 7). This represents a 2% increase from 2024 to 2025 in terms of value added, and a drop of 2% in FTE employment. Notably, this contraction follows strong growth in 2023, which had lifted the sector's total economic contribution above pre-pandemic levels. The largest contribution to total IET industry value added was made by the **Higher Education** subsector, which contributed approximately 65% of the total value added in 2025 (Chart 20).

Chart 20: subsector contribution to total IET industry value added, 2025



Source: Deloitte Access Economics estimates.

Table 7: Total economic contribution of the IET sector, 2024-2025

	2024 value-added (\$bn)	2025 value-added (\$bn)	Growth in value-added	2024 jobs (FTE)	2025 jobs (FTE)	Growth in jobs
Onshore students	4.70	4.79	2%	25,961	25,356	-2%
Offshore students	0.03	0.03	13%	59	67	14%
VFRs	0.003	0.004	49%	21	35	70%
IET sector	4.73	4.83	2%	26,040	25,458	-2%

Source: Deloitte Access Economics estimates.

Notes: The underlying VFR data can be highly volatile from year-to-year, as such the results should be treated with caution.

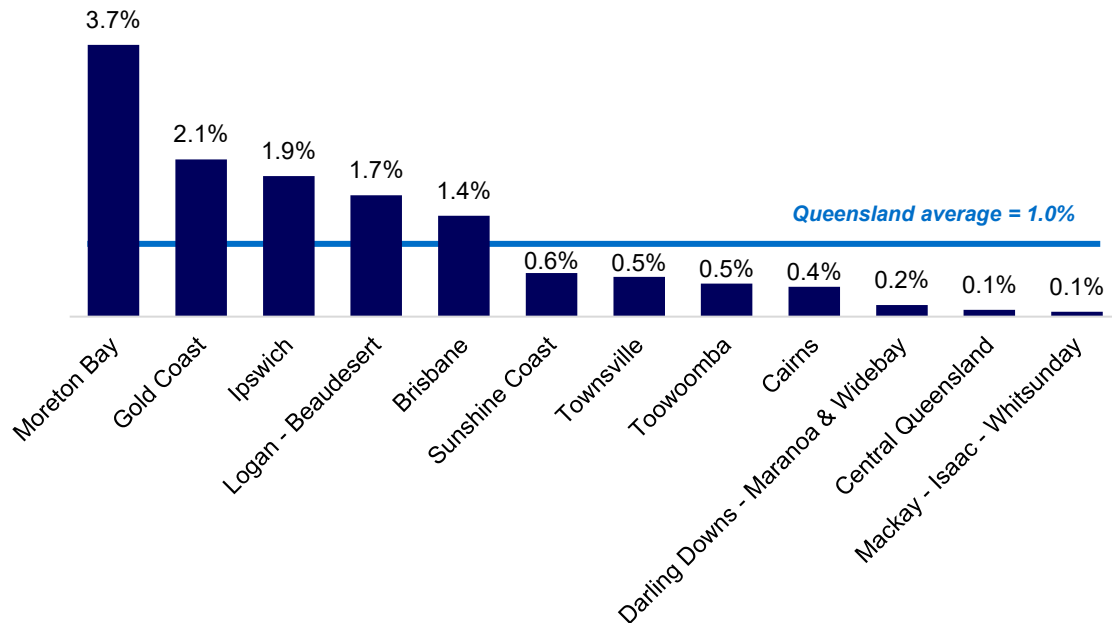
Regional significance of IET

Regional significance of IET

In 2025, it is estimated that the **IET sector directly contributed 0.6% of the total Queensland economy** in value-added terms. When the indirect contribution is included, **the total contribution of the IET sector represented 1.0% of the state economy** (in terms of value added). These overall figures remain unchanged from 2024.

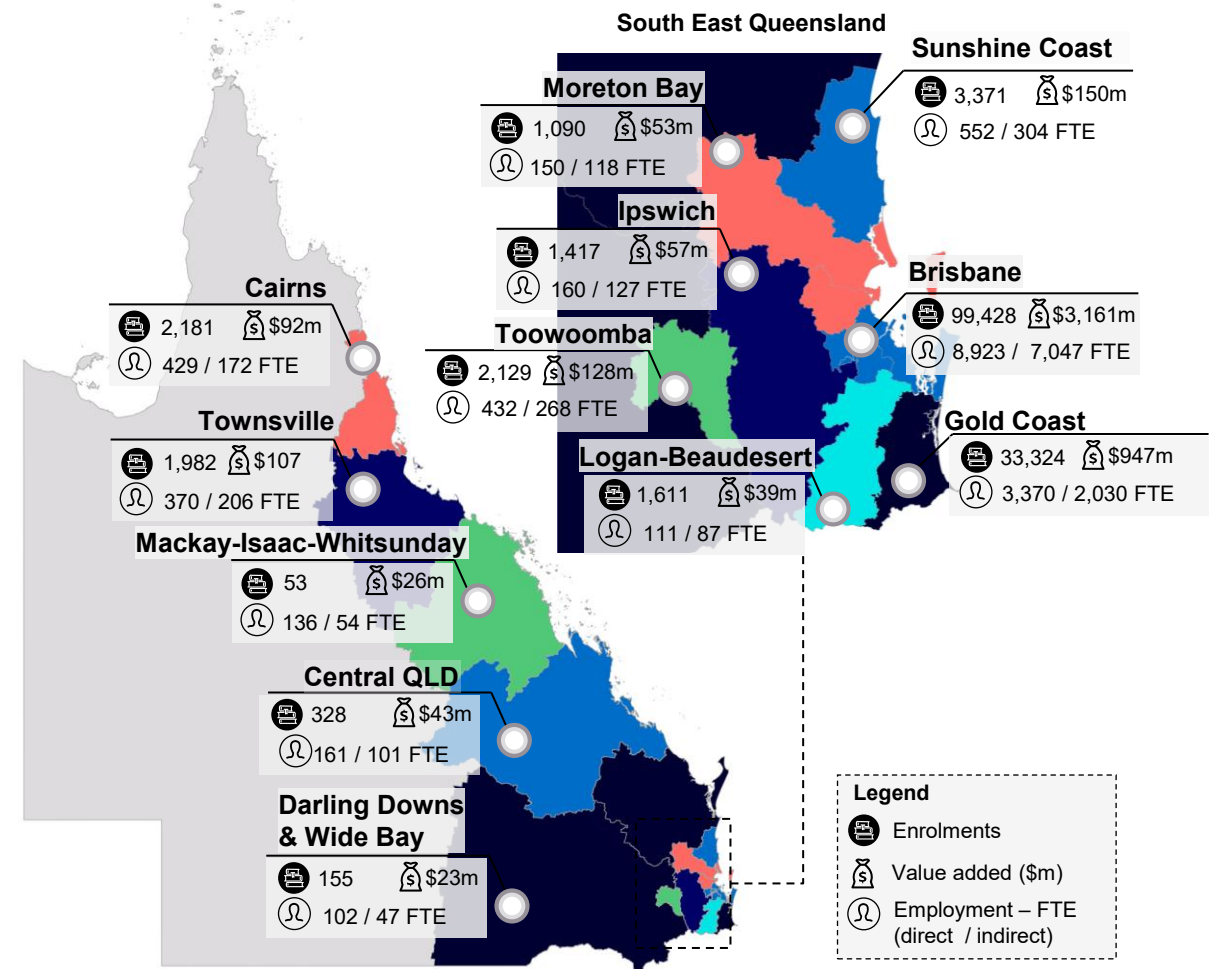
The sector makes a **broad contribution to both metropolitan and regional areas**. In 2025, the sector made the largest proportional contribution (direct and indirect) to **Moreton Bay** for the second year in a row, where it accounted for 3.7% of the regional economy (almost double the 1.8% seen in 2023). Similar to last year, four other regions have a share above 1% including the Gold Coast, Ipswich, Logan - Beaudesert, and Brisbane (Chart 21).

Chart 21: Contribution of the IET sector to regional economies (total economic contribution), 2025



Source: Deloitte Access Economics estimates. Data for Gross Regional Product for 2025 is unavailable. Figures rely on 2023 values scaled by the growth in Queensland's State Product from 2023 to 2025 (obtained from the ABS).

Figure 5: IET total contribution to regional economies, 2025



Source: Deloitte Access Economics estimates. Results may not sum to values listed elsewhere due to 1,520 Queensland enrolments unallocated to a specific region.

Key industries

In 2025, the expenditure of international students on various goods and services supported the direct employment of 14,896 FTE across a variety of industries, as shown in Table 8. More than half of this employment (54%) is in accommodation, and cafes, restaurants and takeaway food services.

Table 8: Direct employment breakdown by industry supported by international student spending, 2025

Tourism employment industry	Direct employment (FTE)	Share of total
Accommodation	5,386	36%
Cafes, restaurants and takeaway food services	2,747	18%
Education and training	1,511	10%
Retail trade	1,496	10%
Road transport and transport equipment rental	1,074	7%
Clubs, pubs, taverns and bars	786	5%
Other sports and recreation services	474	3%
Cultural services	248	2%
Air, water and other transport	233	2%
Casinos and other gambling services	174	1%
Rail transport	103	<1%
All other industries	663	4%
Total	14,896	100%

Source: Deloitte Access Economics estimates. 'Tourism employment industry' is the standard classification set by the ABS Tourism Satellite Account methodology and map to ABS ANZSIC. 'Rail transport' is separately identified and 'Travel agency and information centre services' is excluded given zero direct employment.

Other cohorts of international students

While the economic contribution analysis in this factsheet is limited to students on subclass 500 student visas (which represent the vast majority of international students), it is acknowledged that some other visa holders also engage in study while abroad. Students who hold other visas also contribute economically, socially and culturally to the Queensland economy, including:



ELICOS students

English Australia indicated that approximately 41% of ELICOS students in Queensland held a non-student visa (e.g. visitor visa, working holiday visa, or other/no visa) in the latest data.[^]

[^] English Australia, *National ELICOS Market Report 2024*, <https://www.englishaustralia.com.au/documents/item/2867>



Study tours

Study tours combine education, cultural exchange and tourism activities for students. International students on study tours may hold a subclass 600 visitor visa.*

* Australian Government, *Other ways to study*, <https://www.studyaustralia.gov.au/en/plan-your-studies/other-ways-to-study>

Understanding economic contribution

Defining economic contribution

Economic contribution is an estimate of 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 an entity's contribution to an economy, including:

- **Value added:** A measure of the entity's return on capital and labour (Figure 6). It is the indication of the entity's value and contribution to an economy.
- **Employment:** The number of jobs supported by the entity 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.

The two metrics of economic contribution (i.e. value added and employment) are estimated using an economic contribution model. See pg.19 for methodological details.

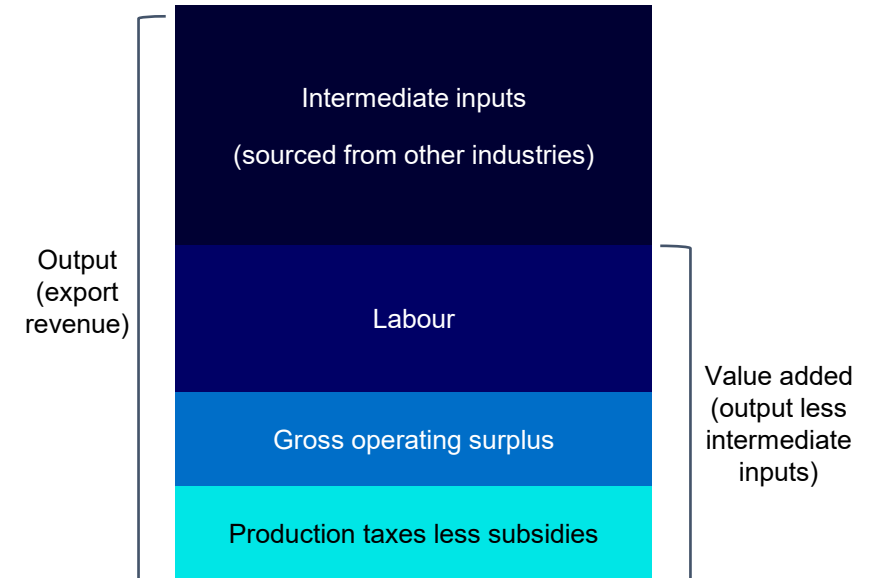
Economic contribution in the IET context

An economic contribution model can be used to estimate the total economic contribution (i.e. value added and employment) of IET students to the Queensland economy (including contributions to regional economies) in a given year. This factsheet summarises the results from an economic contribution model which estimates the value added and employment supported by Queensland's IET students (on student visas) in CY2025.

Export revenue (i.e output) 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.**

Figure 6: National accounting framework



Source: Deloitte Access Economics

Using the 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.

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

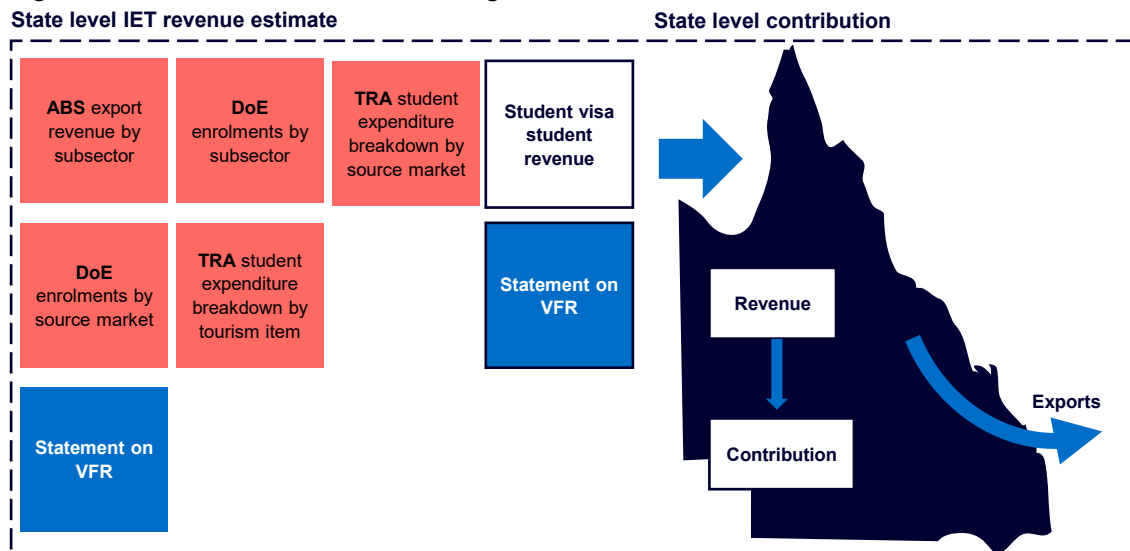
Methodology

Model overview

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.

Trade and Investment Queensland (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 considers the contribution of international students who hold a student visa. Economic contribution estimates are produced using modelling assumptions consistent with Tourism Research Australia's (TRA) Regional Tourism Satellite Account (RTSA) model. This input-output model is the most contemporary and sophisticated of its kind in Australia, and has been applied in a wide range of contexts to understand the economic contribution of tourism related industries. Future updates to model benchmarks could shift production structures, with implications for future economic contribution modelling exercises and the results they generate. In 2025, the modelling estimates for employment (FTE) were adjusted to account for nominal wage rises. The model produces results for each factsheet region based on a correspondence with tourism regions, tourism products, and tourism employment industry classifications.

Figure 7: Economic contribution modelling overview



Source: Deloitte Access Economics

Key data sources and methodological notes

The contribution analysis in this report has been informed by publicly available data (Figure 7) 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 the data custodian where some data is published on a monthly basis[^] (e.g. DoE enrolment and commencement data) while other data is published on an annual basis (e.g. ABS and TRA data).

The DoE data for enrolments by SA4 region have historically included a small number of unallocated enrolments such that the total enrolments and commencements across each region differ slightly from the overall total for Queensland. In 2025, this number of unallocated enrolments decreased significantly from more than 6% of all enrolments in 2024 to approximately 1%, returning to a more modest divergence as seen in historical data prior to 2024. In the modelling process, export revenue is distributed to the regions based on the known enrolment share (with unallocated enrolments distributed proportionally).

Tourism Research Australia data is used to estimate the expenditure of international students' visiting friends and relatives (VFRs). VFRs are visitors who specifically indicate in the International Visitor Survey (IVS) that they are visiting Queensland for the stopover purpose of visiting an international student. From April 2020 to December 2022, the IVS was imputed using Overseas Arrivals and Departures data. However, since 2023, the collection returned to conducting interviews, sampling 30,000 departing, short-term international travellers aged 15 years and over who had been visiting Australia. A more detailed summary of the methodology can be found [here](#). The updated data collection method has considerably reduced the sample size of key IVS variables. To avoid the risk of volatility skewing the robustness of the estimates, the national average VFR expenditure per night has been adopted for all source markets with a sample size below 30.

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 data is updated in each data release, meaning that historical enrolment counts may change over time.