

International education & training snapshot: Darling Downs – Maranoa and Wide Bay 2025

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\$23m

Gross Value Added to the Darling Downs – Maranoa and Wide Bay economy by the IET sector in 2025

↑ 6% higher than 2024



149

Employment (FTE) supported by the Darling Downs – Maranoa and Wide Bay IET sector in 2025

↑ 1% higher than 2024



\$8m

Export revenue generated through the Darling Downs – Maranoa and Wide Bay IET sector in 2025

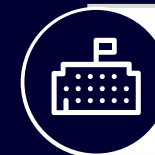
↑ 17% higher than 2024



155

International student enrolments in 2025

↑ 40% higher than 2024



8

CRICOS Providers operating in Darling Downs – Maranoa and Wide Bay as at December 2025

➡ No change compared to 2024

International student enrolments and commencements

International student enrolments



155

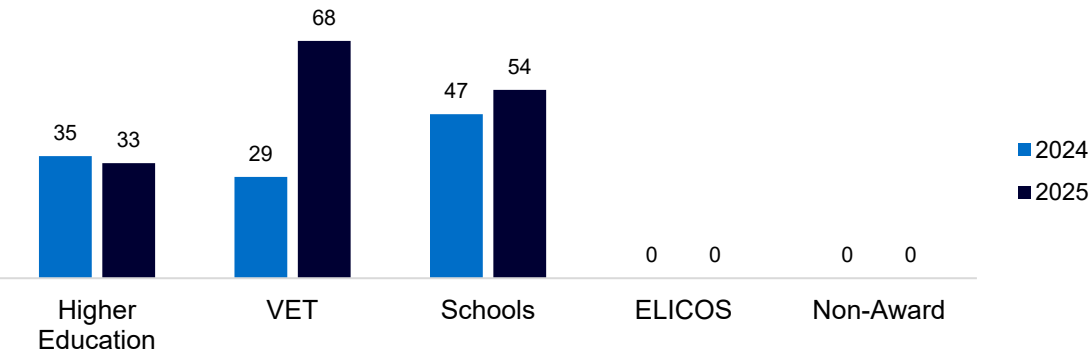
enrolments in 2025

In 2025, international student enrolments in Darling Downs – Maranoa and Wide Bay totalled 155. **Vocational Education and Training (VET)** became the largest subsector, with **68** enrolments, followed by the Schools and Higher Education (HE) subsectors. As in 2024, there were no enrolments in the English Language Intensive Courses for Overseas Students (ELICOS) and Non-Award subsectors (Chart 1).

↑ 40%

Total international student enrolments in Darling Downs – Maranoa and Wide Bay **increased by 40%** compared with 2024 levels. This was driven by substantial growth in the VET (134%) and Schools (15%) subsectors, despite a decline in HE (-6%). Subsequently, VET enrolments increased from 26% to 44% of all enrolments in Darling Downs – Maranoa and Wide Bay.

Chart 1: IET enrolments by subsector between 2024 and 2025



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

Notes: (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.

International student commencements



76

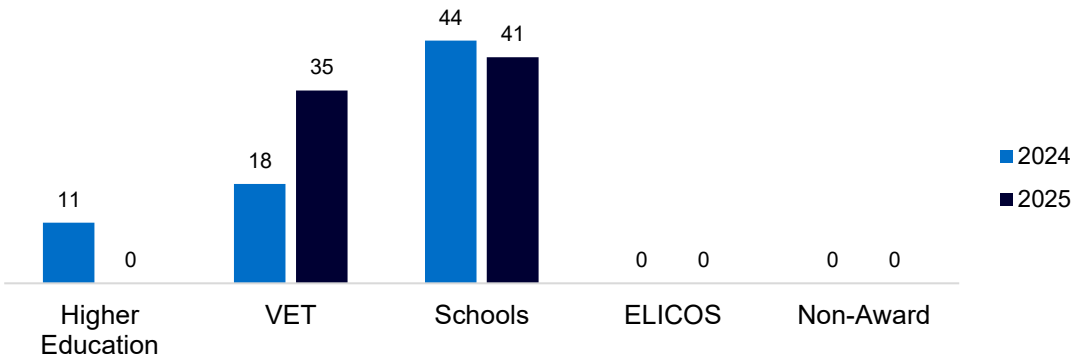
commencements in 2025

In 2025, international student commencements in Darling Downs – Maranoa and Wide Bay **totalled 76**. As in 2024, Schools remained the largest subsector, with **41** commencements, followed by the VET subsector (Chart 2). There were no commencements in the HE, ELICOS and Non-Award subsectors.

↑ 4%

Total international student commencements in Darling Downs – Maranoa and Wide Bay **increased by 4%** compared with 2024 levels. This was driven by substantial growth in the VET subsector (94%), a decline in the Schools subsector (-7%) and no commencements in the HE subsector.

Chart 2: IET commencements by subsector between 2024 and 2025



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

Enrolments, commencements, providers, and courses

Enrolments by source market

The largest source markets for international student enrolments in the other Queensland regions* continued to be **Nepal and India**, which together accounted for **48%** of total enrolments in 2025 (Table 1). Within the top five enrolment source markets, Nepal, China and Bangladesh observed enrolment growth between 2024 and 2025, with Bangladesh growing by 68%.

Table 1: Enrolments in top five source markets, 2024 and 2025

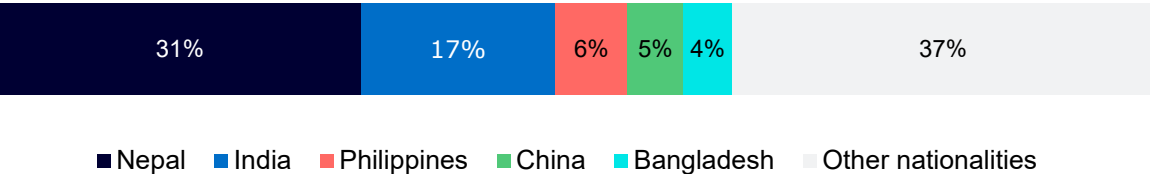
	2024		2025		Growth (share)
	Enrolments	Share	Enrolments	Share	
Nepal	443	29%	514	31%	↑
India	265	18%	277	17%	↓
Philippines	115	8%	102	6%	↓
China	56	4%	80	5%	↑
Bangladesh	41	3%	69	4%	↑

Source: Australian Government Department of Education, international student enrolments by SA4, May 2026 release.

Source market concentration

Enrolments in the other Queensland regions* top five source markets accounted for **63% of the region’s international student enrolments** in 2025 (Chart 3). Their source market concentration is higher than the total Queensland market, where the top five source markets accounted for 51% of international student enrolments.

Chart 3: Source market concentration, 2025



Source: Australian Government Department of Education, international student enrolments by SA4, 2025 Dec YTD.

[^] 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.
^{*} ‘Other Queensland regions’ includes Central Queensland, Darling Downs – Maranoa and Wide Bay, Mackay – Isaac – Whitsunday, and Moreton Bay.

Enrolments and commencements by broad field of education

Table 2: Enrolments and commencements for the top five broad fields of education, 2025

Field of education	Enrolments	Share	Commencements	Share
Mixed Field Programmes	54	35%	41	54%
Health	31	20%	0	0%
Agriculture, Environmental and Related Studies	28	18%	25	33%
Engineering and Related Technologies	21	14%	10	13%
Natural and Physical Sciences	12	8%	0	0%
Other	9	6%	0	0%

Source: Australian Government Department of Education, international student enrolments and commencements by SA4, May 2026 release. Note: the top five broad fields of education are ranked by enrolments.

CRICOS providers and courses[^]

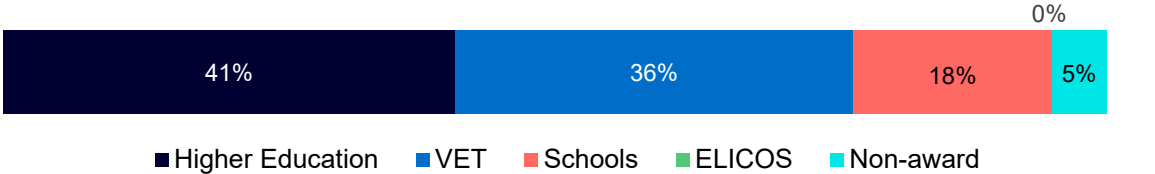
Table 3: CRICOS providers and courses between 2024 and 2025

	2024	2025	YOY Change
Providers	8	8	0%
Courses	79	61	-23%

Source: Deloitte Access Economics estimates using Australian Government Department of Education data.

Over three-quarters of the courses offered in Darling Downs – Maranoa and Wide Bay were in the HE and VET subsectors (Chart 4).

Chart 4: Share of CRICOS courses by IET sector in Darling Downs - Maranoa and Wide Bay, 2025



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

Export revenue in the IET sector

Export revenue



\$8m

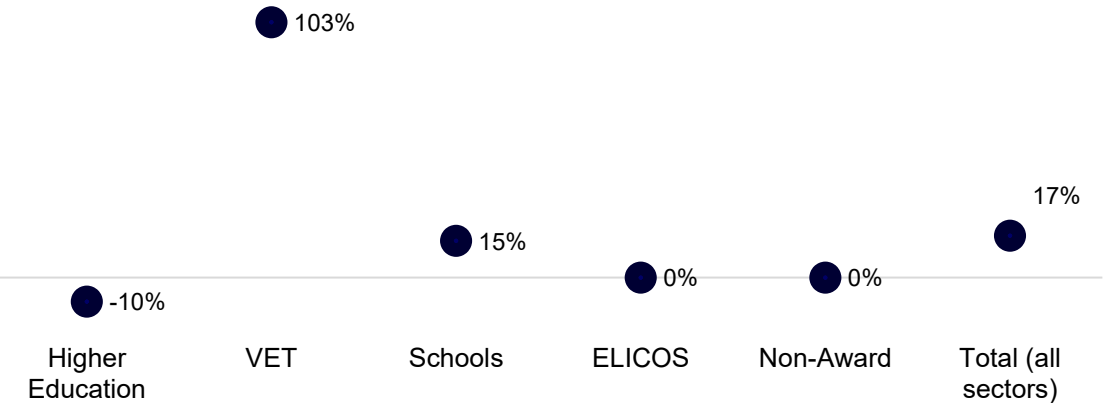
Export revenue in 2025

Total export revenue from international student expenditure on tuition fees, goods and services, and visiting friends and relatives (VFR) expenditure was **\$8 million** in 2025, an increase of 17% compared with 2024 (Chart 5). Onshore student expenditure accounted for 99% of Darling Downs – Maranoa and Wide Bay’s total export revenue, with the final 1% made up of offshore students and VFRs.

As in 2024, Darling Downs – Maranoa and Wide Bay remained one of the smallest regions of the IET sector, accounting for **0.1%** of Queensland’s IET export revenue in 2025. The Schools subsector made the largest contribution to IET export revenue in Darling Downs – Maranoa and Wide Bay, contributing \$4 million, or 46%, towards IET export revenue.

Export revenue increased across all subsectors except HE, which declined by 10%. The VET subsector experienced significant growth of 103%. There were no enrolments, resulting in no export revenue in the ELICOS and Non-Award subsectors for 2025, consistent with previous years.

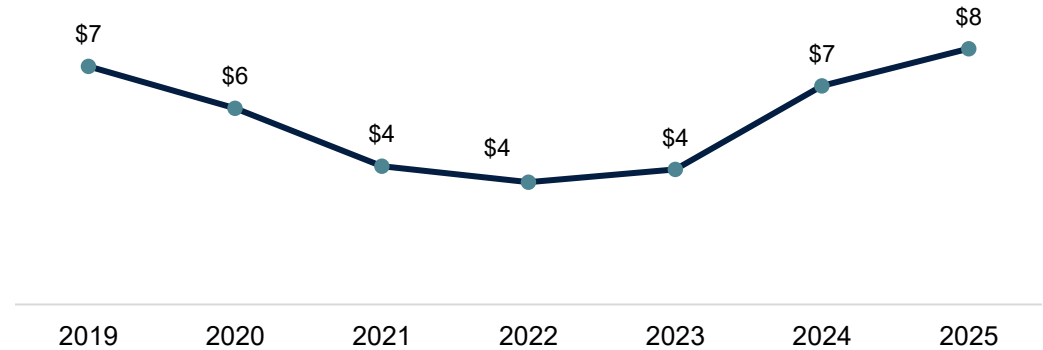
Chart 5: Export revenue growth by IET subsector between 2024 and 2025



Source: Deloitte Access Economics estimates using Australian Bureau of Statistics (ABS), Tourism Research Australia (TRA), and Australian Government (Commonwealth) Department of Education data.
Darling Downs – Maranoa and Wide Bay

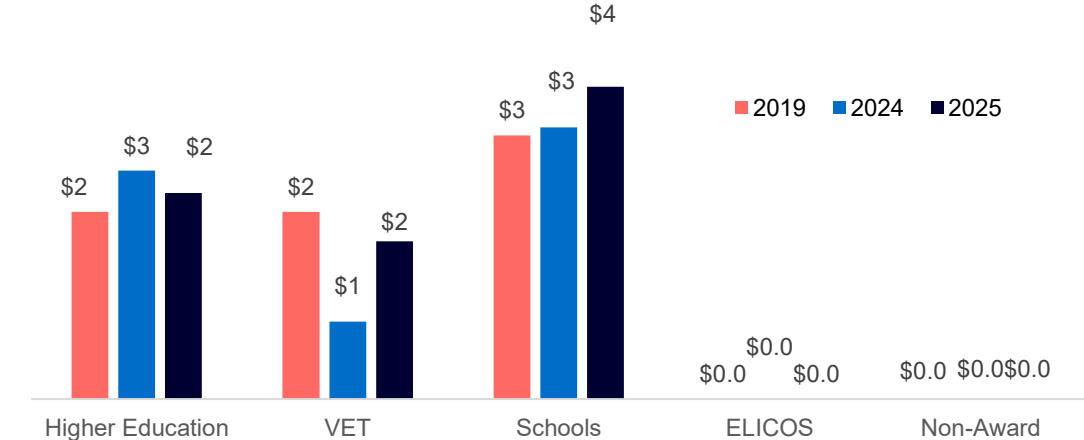
As of 2025, IET export revenue for Darling Downs – Maranoa and Wide Bay has surpassed 2019 pre-pandemic levels. This was driven by continued growth in the Schools (18%) and a recovery in the VET subsector.

Chart 6: IET export revenue between 2019 and 2025 (\$m)



Source: Deloitte Access Economics estimates using ABS, TRA, and Commonwealth Department of Education data.

Chart 7: IET export revenue by subsector, 2019, 2024 and 2025 (\$m)



Source: Deloitte Access Economics estimates using ABS, TRA, and Commonwealth Department of Education data.

Economic contribution of the IET sector

Total economic contribution



\$23m

value added to the Darling Downs – Maranoa and Wide Bay by the IET sector in 2025

In total, the IET sector contributed **\$23 million** and supported **149 full-time equivalent (FTE)** jobs in the Darling Downs – Maranoa and Wide Bay region in 2025. This represents a 5.9% increase in total value-added and a 1.1% increase in employment from 2024.

Key industries

The expenditure of international students on various goods and services supports the direct employment of 102 FTE across a variety of industries, as shown in Table 4. More than half of this employment (63%) is in accommodation, cafes, restaurants and takeaway food services.

Table 4: Direct employment breakdown by industry supported by international student spending, 2025

Tourism employment industry	Direct employment (FTE)	Share of total
Accommodation	48	47%
Cafes, restaurants and takeaway food services	16	15%
Retail trade	11	11%
Education and training	10	10%
Road transport and transport equipment rental	5	5%
Clubs, pubs, taverns and bars	4	4%
Cultural services	1	<1%
Other sports and recreation services	1	<1%
Air, water and other transport	1	<1%
Rail transport	1	<1%
Casinos and other gambling services	0	<1%
All other industries	4	4%
Total	102	100%

Source: Deloitte Access Economics estimates. Note: '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.

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 **\$15 million** and supported **102 FTE** jobs in the Darling Downs – Maranoa and Wide Bay region (Table 5).

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

	Value-added (\$m)			Jobs (FTE)		
	2024	2025	Growth	2024	2025	Growth
Onshore students	\$14	\$15	7%	102	102	-0.2%
Offshore students	\$0.1	\$0.1	19%	\$0.1	\$0.1	22%
VFRs	\$0.01	\$0.01	46%	\$0.1	\$0.1	73%
IET sector	\$14	\$15	7%	102	102	-0.1%

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 **\$8 million** and supported **47 FTE** jobs in the Darling Downs – Maranoa and Wide Bay region in 2025 (Table 6).

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

	Value-added (\$m)			Jobs (FTE)		
	2024	2025	Growth	2024	2025	Growth
Onshore students	\$8	\$8	4%	45	46	4%
Offshore students	\$0.03	\$0.04	23%	0.1	0.2	23%
VFRs	\$0.01	\$0.01	70%	0.03	0.06	75%
IET sector	\$8	\$8	4%	45	47	4%

Source: Deloitte Access Economics estimates.

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. 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.

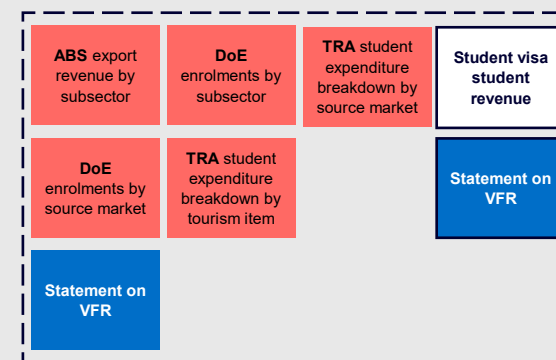
Data sources

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

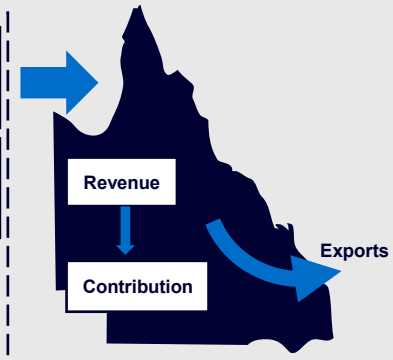
informed by publicly available data including: enrolment and commencement data from the Australian Government Department of Education (DoE), student visa data from the Department of Home Affairs (DoHA), export revenue data from the Australian Bureau of Statistics (ABS) and expenditure item and visiting friends and relatives data from TRA. The frequency and availability of data is dependent on the data custodian.[^]

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).

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.