International education & training snapshot:

Gold Coast 2025

Publication date: July 2026

$950m

Gross Value Added to the Gold Coast economy by the IET sector in 2025

↓ *3% lower than 2024*

5,401

Employment (FTE) supported by the Gold Coast IET sector in 2025

↓ *7% lower than 2024*

$1.33bn

Export revenue generated through the Gold Coast IET sector in 2025

↓ *5% lower than 2024*

33,324

International student enrolments in 2025

↓ *5% lower than 2024*

99

CRICOS Providers operating in Gold Coast as at December 2025

↓ *3% lower than 2024*

International student enrolments and commencements

International student enrolments

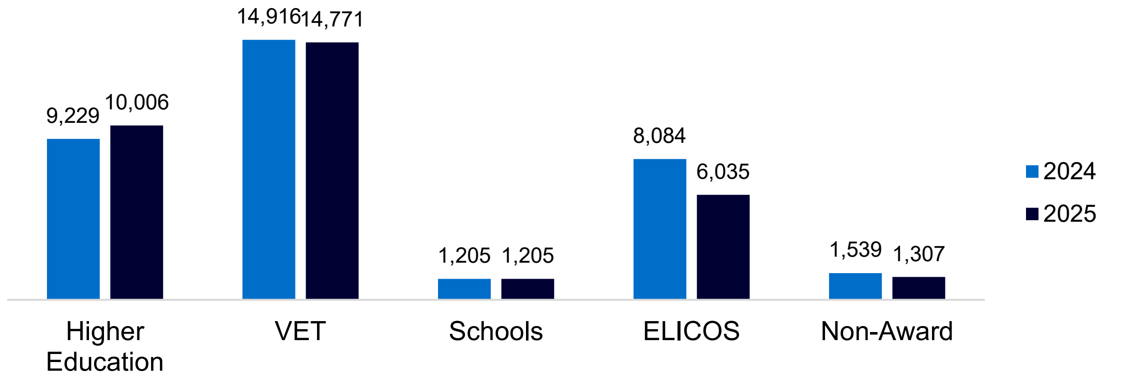
33,324
enrolments in 2025

In 2025, international student enrolments in the Gold Coast totalled 33,324. As in 2024, **Vocational Education and Training (VET)** remained the largest subsector, with **14,771** enrolments, followed by the Higher Education (HE) and English Language Intensive Courses for Overseas Students (ELICOS) subsectors (Chart 1).

↓ 5%

Total international student enrolments in the Gold Coast **decreased by 5%** compared with 2024 levels. This was driven by declines across the ELICOS (-25%), and Non-Award (-15%) subsectors, despite no change in the Schools subsector and an increase in the HE subsector (8%).

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.

International student commencements

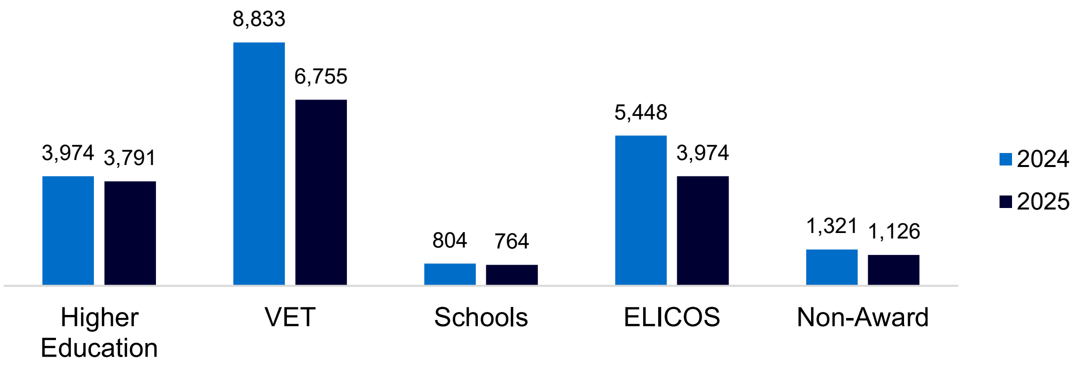
16,410
commencements in 2025

In 2025, international student commencements in the Gold Coast **totalled 16,410**. As in 2024, VET remained the largest subsector, with 6,755 commencements, followed by the ELICOS and the HE subsectors (Chart 2).

↓ 19%

Total international student commencements in the Gold Coast **decreased by 19%** compared with 2024 levels. This was driven by declines in commencements across all subsectors: HE (-5%), VET (-24%), Schools (- 5%), ELICOS (-27%), and Non-Award (-15%).

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.

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.

Enrolments, commencements, providers, and courses

Enrolments by source market

The largest source markets for international student enrolments in the Gold Coast continued to be **Brazil and India**, which together accounted for **31%** of total enrolments in 2025 (Table 1). Within the Gold Coast's top five enrolment source markets, only India (1%) and China (6%), observed enrolment growth between 2024 and 2025.

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

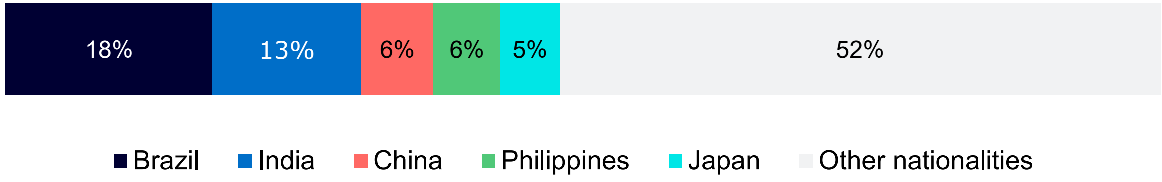
	2024		2025		
	Enrolments	Share	Enrolments	Share	Growth (share)
Brazil	6,364	18%	5,977	18%	–
India	4,228	12%	4,287	13%	↑
China	1,973	6%	2,091	6%	–
Philippines	2,529	7%	1,925	6%	↓
Japan	1,866	5%	1,718	5%	–

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

Source market concentration

Enrolments in the Gold Coast's top five source markets accounted for **48% of the region's international student enrolments** in 2025 (Chart 3). The Gold Coast's source market concentration is lower 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.

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
Society and Culture	9,642	29%	5,726	35%
Management and Commerce	6,386	19%	3,113	19%
Health	2,987	9%	1,357	8%
Information Technology	2,761	8%	765	5%
Food, Hospitality and Personal Services	2,613	8%	1,119	7%
Other	8,935	27%	4,330	26%

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^

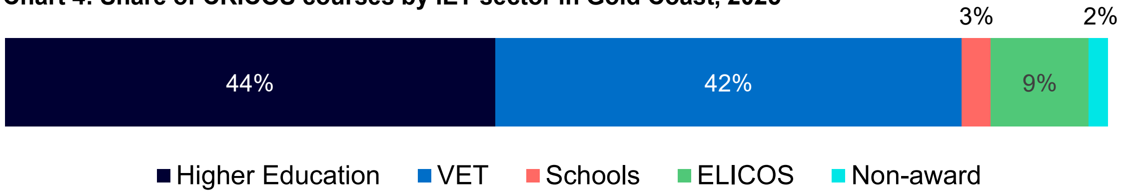
Table 3: CRICOS providers and courses between 2024 and 2025

	2024	2025	YOY Changee
Providers	102	99	-3%
Courses	1,614	1,437	-11%

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

Over 80% of the courses offered in the Gold Coast were in the HE and VET subsectors (Chart 4).

Chart 4: Share of CRICOS courses by IET sector in Gold Coast, 2025



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

^ 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.

Export revenue in the IET sector

Export revenue

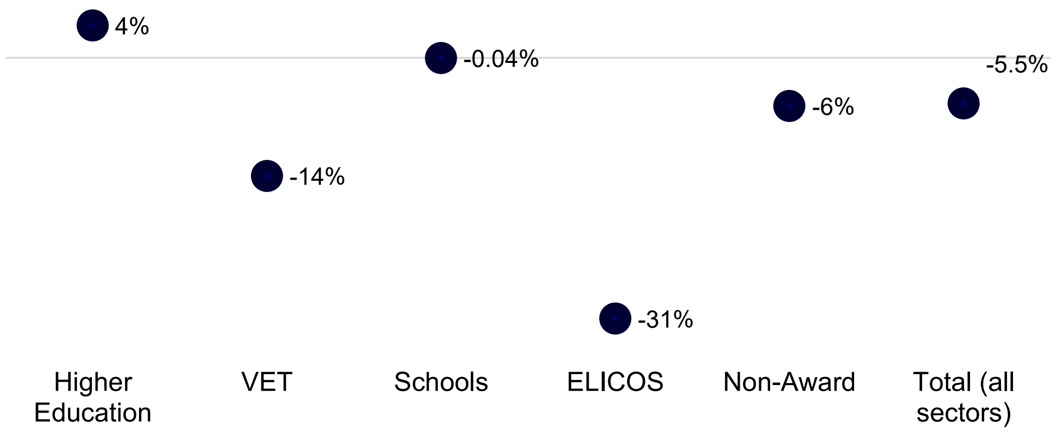
$1.33bn
Export revenue in 2025

Total export revenue from international student expenditure on tuition fees, goods and services, and visiting friends and relatives (VFR) was **$1.33 billion** in 2025, down 5.5% from 2024 (Chart 5). Onshore student expenditure accounted for 99% of the Gold Coast region's total export revenue, with the final 1% made up of offshore students and VFRs.

The Gold Coast accounted for **19.5%** of Queensland's IET export revenue in 2025. The HE subsector made the largest contribution to IET export revenue in the Gold Coast, accounting for **$0.74 billion**, or 55%.

Export revenue decreased across all subsectors except for the HE subsector, which increased by 4%.

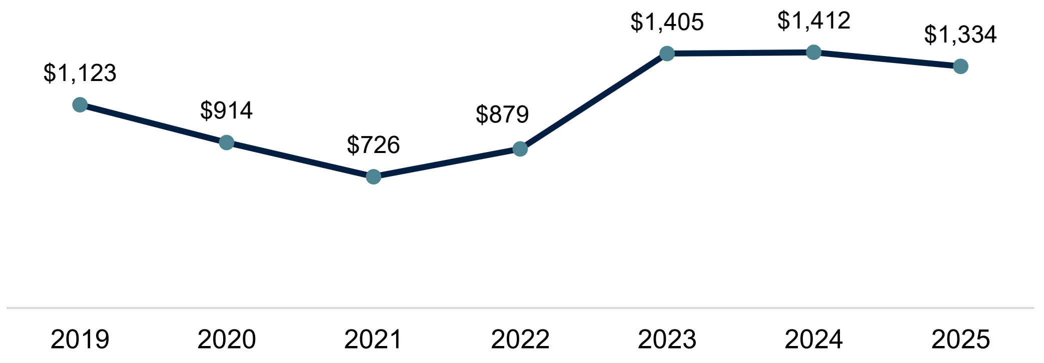
Chart 5: Export revenue growth by IET subsector between 2024 and 2025



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

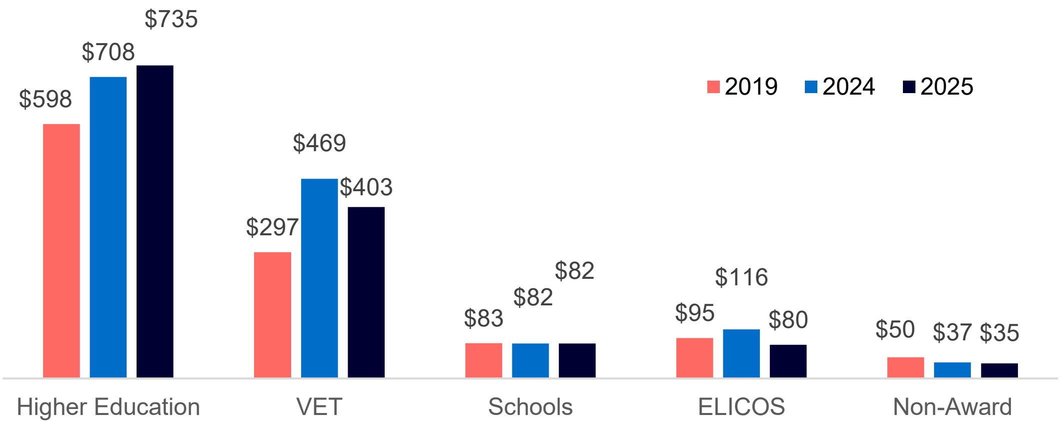
The Gold Coast's IET export revenue is declining but remains 19% larger than 2019 levels (Chart 6). Over the last five years, the HE subsector has consistently grown, with only HE (23% larger) and VET (36%) at levels higher than pre-pandemic (Chart 7).

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

$0.95bn

value added to the Gold Coast region by the IET sector in 2025

In total, the IET sector contributed **$0.95 billion** and supported **5,401 full-time equivalent (FTE)** jobs in the Gold Coast region in 2025. This represents a 2.7% decrease in total value-added and a 7.2% decrease in employment from 2024.

Key industries

The expenditure of international students on various goods and services supports the direct employment of 3,370 FTE across a variety of industries, as shown in Table 4. More than half of this employment (57%) is in accommodation, and 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	1,316	39%
Cafes, restaurants and takeaway food services	621	18%
Retail trade	341	10%
Education and training	289	9%
Road transport and transport equipment rental	218	6%
Clubs, pubs, taverns and bars	177	5%
Other sports and recreation services	136	4%
Cultural services	49	1%
Casinos and other gambling services	42	1%
Air, water and other transport	41	1%
Rail transport	12	<1%
All other industries	128	4%
Total	**3,370**	**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 **$0.57 billion** and supported **3,370 FTE** jobs in the Gold Coast 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	$574	$566	-1%	3,672	3,361	-8%
Offshore students	$4	$4	10%	4	4	11%
VFRs	$0.3	$0.5	38%	3	6	69%
IET sector	**$578**	**$571**	**-1%**	**3,678**	**3,370**	**-8%**

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 **$0.38 billion** and supported **2,030 FTE** jobs in the Gold Coast 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	$392	$374	-5%	2,130	2,019	-5%
Offshore students	$2	$2	10%	8	9	11%
VFRs	$0.3	$0.5	51%	2	3	57%
IET sector	**$394**	**$376**	**-5%**	**2,139**	**2,030**	**-5%**

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.***

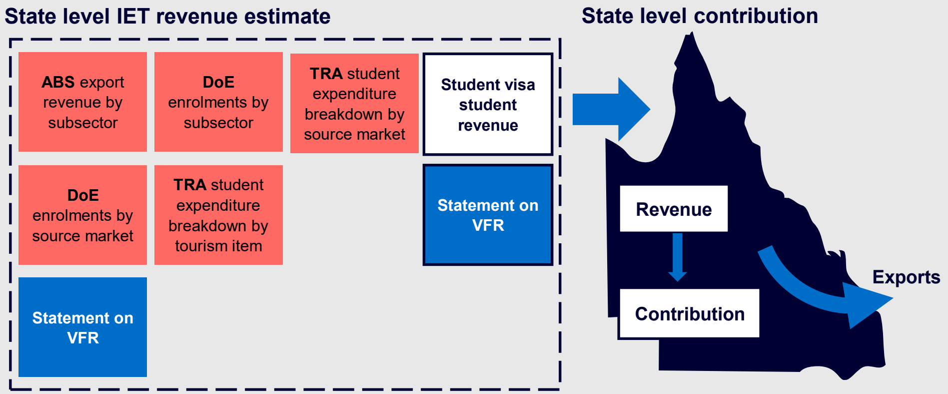
Economic contribution model

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).



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.