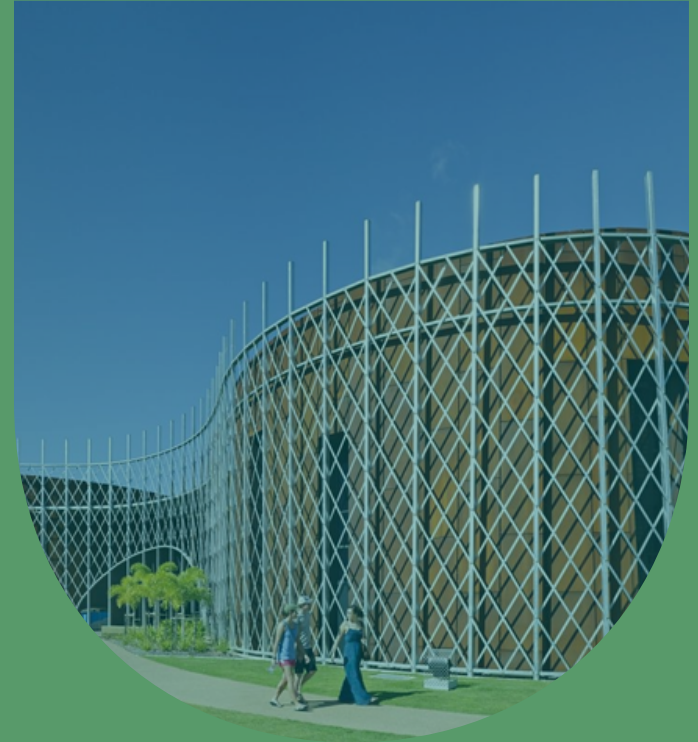


CAIRNS REGIONAL COUNCIL

EDUCATION AND TRAINING INDUSTRY

2021/22



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Industry Snapshot - 2022



\$1,003M

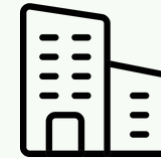
Output / Total Sales



8,418

Local Jobs

9.9% of total local jobs



217

Local Businesses

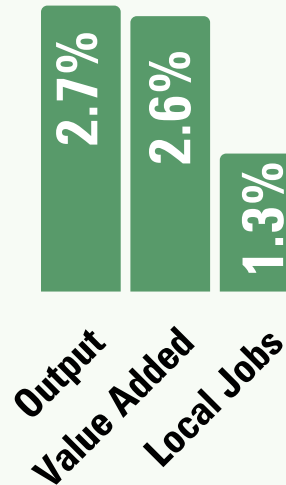


\$673M

Gross Value Added

7.9% of total industry value added

**5YR
ANNUAL
GROWTH**



KEY SUB-INDUSTRIES



School Education

\$390M Value Added

5,186 Jobs



Tertiary Education

\$236M Value Added

1,812 Jobs

Sources: NIEIR, 2023; ABS, 2022

Industry Size and Composition



Output/Sales



Value Added



Employment

Direct

\$1,003M

\$673M

8,418

Indirect/Flow-on Impacts

Industrial

\$261M

\$128M

1,096

+

+

+

Consumption

\$473M

\$234M

2,446

Total Impact

\$1,737M

\$1,035M

11,960

In 2021/22, the Education and Training Industry in Cairns was estimated to have generated \$673M in direct plus an additional \$362M in indirect impacts for a total contribution of \$1,035M in Value Added. The industry supported 8,418 jobs directly and an additional 3,542 in indirect employment. The largest sub-industry for direct employment was estimated to be School Education with 61.6% of the total sector's employment.

Share of Total Sector Employment, 2021/22

Adult, Community and Other

16.9%

Tertiary Education

21.5%



School Education

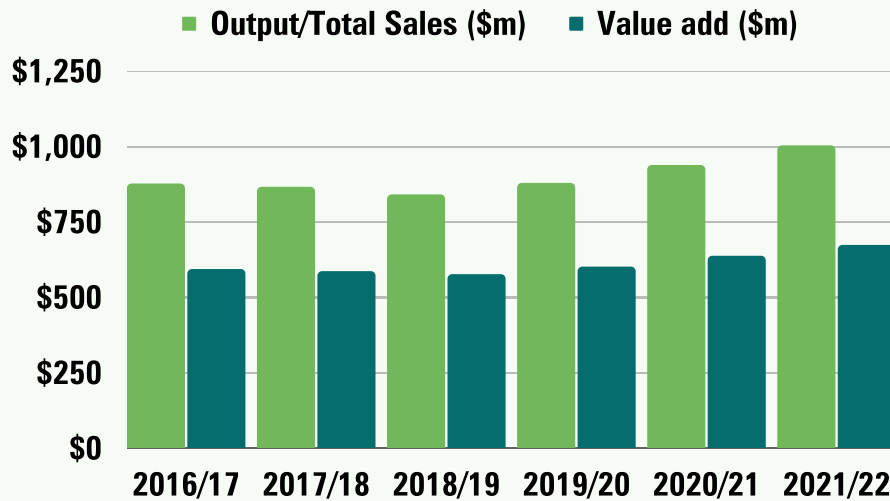
61.6%

Sources: NIEIR, 2022

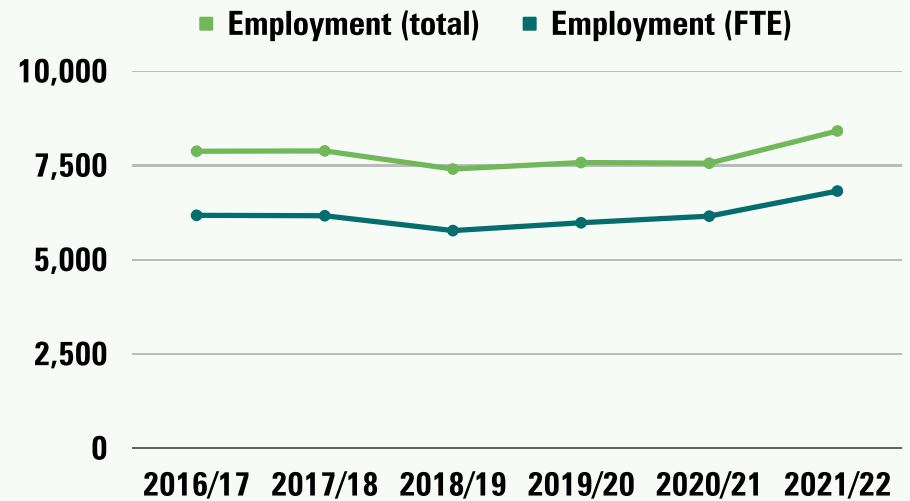
GROWTH TRENDS

In 2021/22, there were an estimated 8,418 employees working in the Education and Training Industry in Cairns and 6,823 full-time equivalents. The industry generated \$673M in Value Added, or \$79,933 per employee (\$98,608/FTE). Growth in the industry has averaged 1.3% p.a. for employment over the last five years and 2.6% p.a. for value added. Jobs growth has been below the state average, but economic value above state average suggesting increased productivity in the industry.

Economic Value, Cairns Region, Financial Year



Average Employment, Cairns Region, Financial Year



**5 YEAR
AVERAGE
ANNUAL
INDUSTRY
GROWTH**

2.7%

Output/Sales

1.5% p.a.

2.6%

Value Added

1.5% p.a.

**5 YEAR
AVERAGE
ANNUAL
INDUSTRY
GROWTH**

1.3%

Employment

2.3% p.a.

2.0%

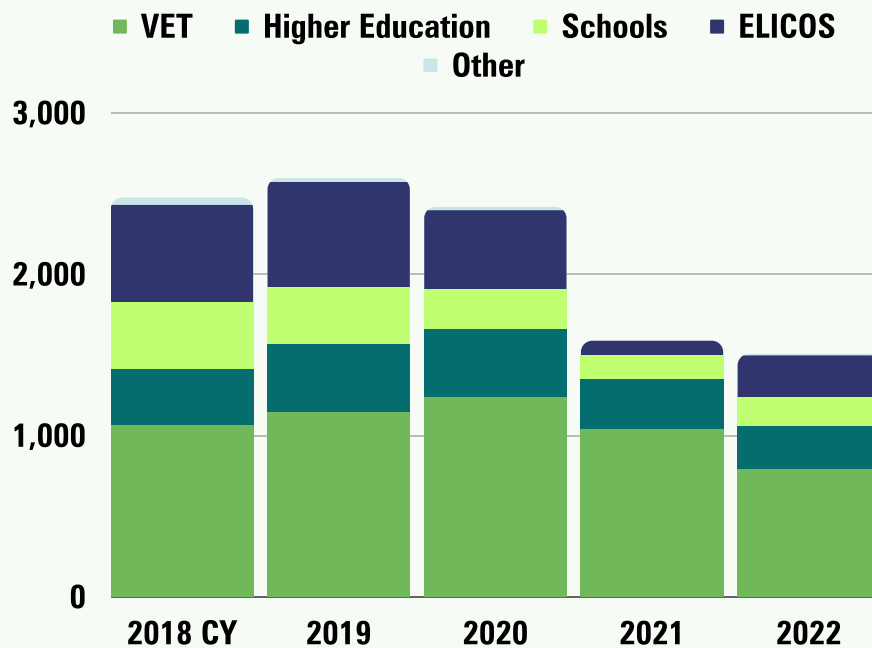
FTEs

3.0% p.a.

Sources: NIEIR, 2022

INTERNATIONAL EDUCATION

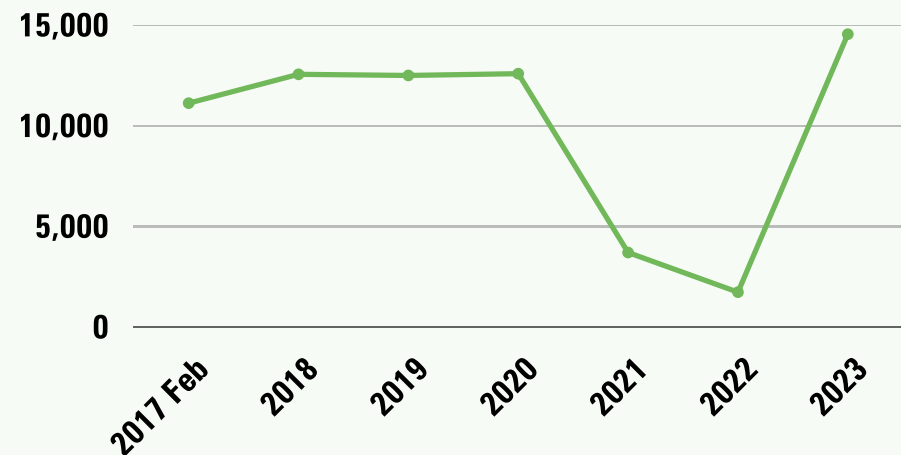
International Student Enrolments, Cairns SA4 Region, Calendar Year (CY)



International students play an important role in the Cairns economy. Prior to COVID, they were an estimated average of 2,500 international student enrolments per year in the Cairns region (ABS SA4 geography). This number fell by almost a 1,000 enrolments in 2021 and 2022.

The most impacted sub-sector was English Language Intensive Courses for Overseas Students (ELICOS) enrolments, which more than halved in Cairns between 2019 and 2022. However, the outlook appears promising with ELICOS enrolments in Queensland in 2023 (YTD February) exceeding pre-COVID levels in 2023.

ELICOS Enrolments, QLD, February Year-to-Date



Source: Department of Education, Commonwealth Provider Registration and International Student Management System (PRISMS) database, 2023

COMPETITIVE ANALYSIS



James Cook University and CQUniversity have large campuses in Cairns providing courses to about 5000 students. TAFE Queensland also has major facility in the city.



Cairns is attractive to international students offering lifestyle advantages, major city facilities and access to the Great Barrier Reef. Employment opportunities for students are also in good supply.



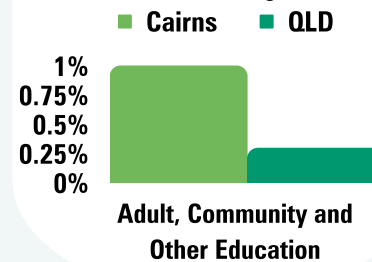
Cairns is home to world-class training facilities in specialised areas such as the Cairns Aviation Skills Centre and the Great Barrier Reef International Marine College. Hospitality and health disciplines are also key focus areas.



The need for higher education is increasing - the share of key working age residents in Cairns with qualifications rose 4.5% between 2016 and 2021. The majority of this growth was in residents with degrees.



Share of pre-COVID exports value generated by adult education was more than three times the state average.



WORKFORCE PROFILE

KEY CHARACTERISTICS OF THE EDUCATION AND TRAINING INDUSTRY, 2021 - CAIRNS REGION

Workers in the Education and Training Industry in Cairns were slightly older than the state as a whole in 2021 with a median age of 46. Three quarters of workers were female and a quarter born overseas.

More than half the workforce was degree educated (58%) and working in professional or managerial roles (61%).

In 2021, the FTE median income of the local workforce was slightly lower than the state median.



46 years

Median Age

QLD - 44 years



\$85,059

Median Income FTE

QLD - \$88,469

♂ 26% **♀ 74%**
Male **Female**

QLD - 26%/74%



56%

Full Time

QLD - 55%



25%

Born Overseas

QLD - 24%



4%

Owner Manager

QLD - 5%



58%

**Degree or
Above**

QLD - 61%

29%

**Certificate III to
Advanced Diploma**

QLD - 25%



61%

Professionals/Managers

QLD - 62%

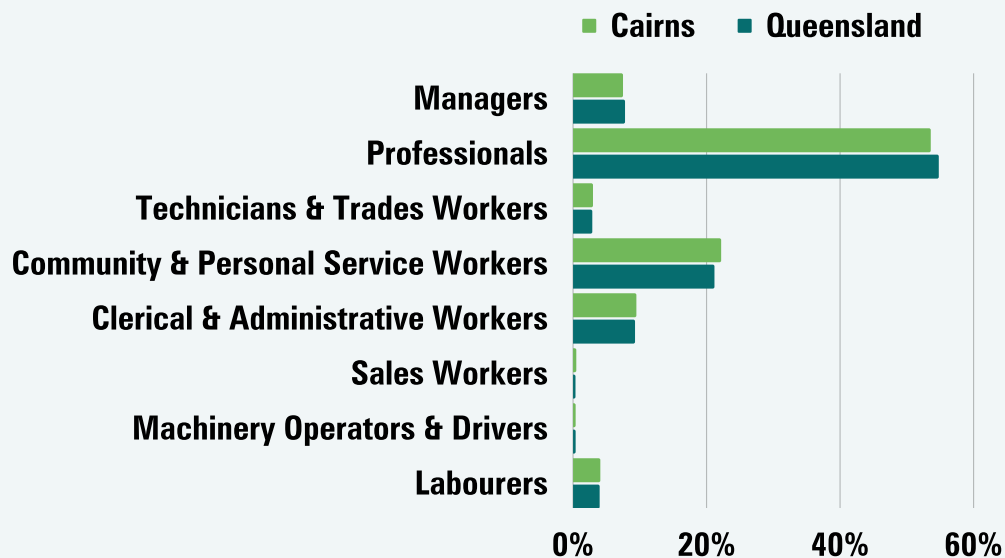
Sources: ABS Census of Population and Housing, 2022

EDUCATION & SKILLS

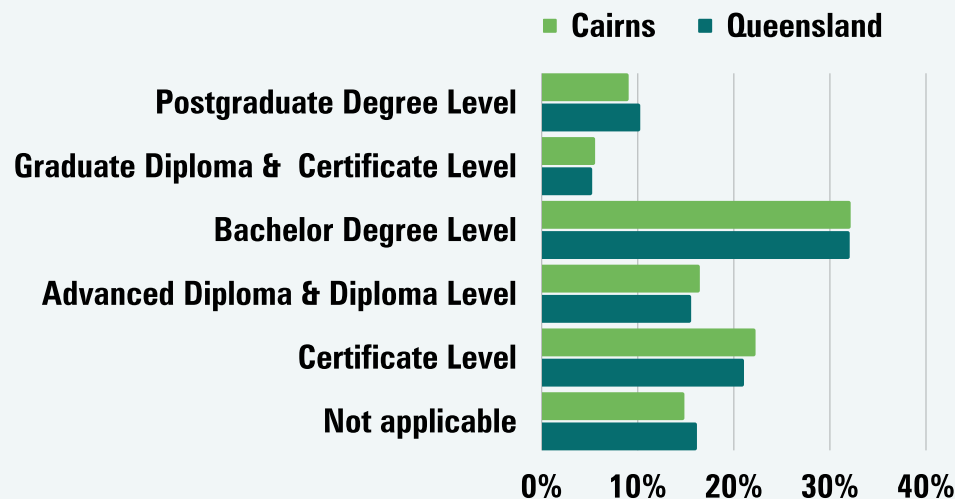
The Education and Training Industry in Cairns had an equivalent share of workers in professional occupations in 2021 (54%) compared to the QLD average (54%). The top occupations were secondary and primary teachers.

The industry had a slightly higher share of qualified workers (85%) than the QLD average (84%), but a slightly lower share with post-graduate degree level qualifications (9% vs 10% for QLD).

Local Workforce Occupations, 2021



Local Workforce Qualifications, 2021



Top Occupations

- Secondary School Teachers
- Primary School teachers
- Education Aides
- Child Carers

Top Study Fields

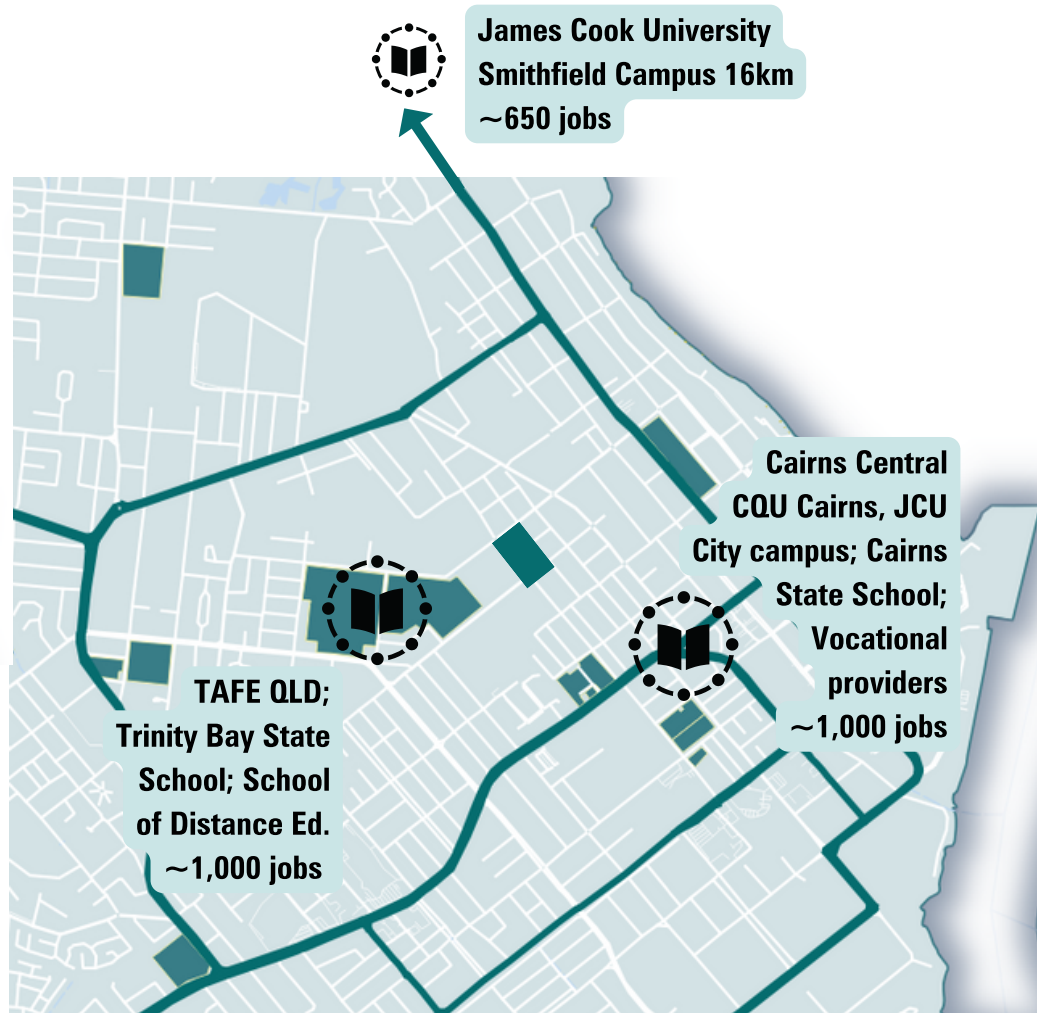
- Teacher Education (Secondary and Primary)
- Business and Management
- Children's Services

Sources: ABS Census of Population and Housing, 2022

Main employment precincts



Estimated Industry Jobs, 2021



Sources: ABS Census of Population and Housing, 2022

Key employers

- Cairns Aviation Skills Centre
- Cairns College of English & Business
- Cairns State High School
- Catholic Education in the Diocese of Cairns
- CQUniversity
- Great Barrier Reef International Marine College
- Holmes Institute
- James Cook University
- Redlynch State College
- Saint Augustine's College Cairns
- Saint Monica's College Cairns
- TAFE Queensland
- Trinity Bay State School

PROJECTS & TRENDS SHAPING THE FUTURE



CQUniversity (CQU) city campus

CQU has received Federal Government funding to develop a \$50M new city based campus. This will allow them to deliver an expanded range of training, education and research offerings to 4,500 expected students per year by 2030.



Cairns Tropical Enterprise Centre

James Cook University has received \$60M in funding to establish a technology-led facility featuring a clinical school, research, and innovation activities. This will create a multi-disciplinary centre for applied technology and enterprise with a focus on health.



Increase in online learning

The ABS estimates online learning for work-related courses more than doubled from 19% in 2016/17 to 55% in 2020/21. This provides opportunities for regional areas, but is also a threat to location-based international education.



Changing nature of education facilities

Education facilities are increasingly becoming integrated into larger precincts and incorporating different community services. Schools are building real world training facilities to support better career pathways e.g. Bentley Park College's Medical Training Precinct.

SWOT Analysis

STRENGTHS

- Strong higher education providers supplying courses that cater to local needs and export opportunities
- Specialist facilities such as Cairns Aviation Skills Centre and the Great Barrier Reef International Marine College that complement growth industries.
- Designated Area Migration Agreements (DAMA) for FNO allows Cairns to attract more overseas workers
- Lifestyle factors attractive to workers and students
- Proximity to Asia attractive for overseas students



WEAKNESSES

- Distance to other major domestic population bases can limit schools growth
- Higher education facilities and vocational centres vulnerable to exchange rate movements which can impact demand from international students
- Low demand for particular courses as a result of low awareness of job availability and relevant qualifications needed in certain professions



THREATS

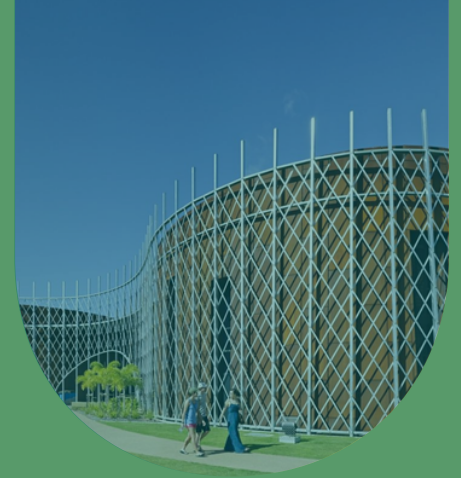
- Labour constraints to potentially continue for sometime
- Increases in online provision of courses may limit growth in on-campus learning
- Rising living costs
- Higher education is counter cyclical to the economy, so in times of low unemployment, people tend to move away from studying



OPPORTUNITIES

- CQUniversity Cairns city campus to support additional students and employment
- Designation of Cairns as a Defence Regional Maintenance Hub will create training opportunities in marine and manufacturing areas
- Investment at Cairns Hospital will see the facility transition to a university hospital, improving the region's capabilities to build its own medical, nursing, and allied health workforce, to expand its clinical services, and to translate research into practice. James Cook University is also now offering a full medical degree in Cairns
- A \$16M investment by the QLD Government to expand the world-class training facilities at the Great Barrier Reef International Marine College in Cairns will enable growth in both program delivery and student numbers





For more economic data on the
Cairns Region, visit economy.id

