



The English Language Travel Market in Malta

Year 2023

20th May 2024

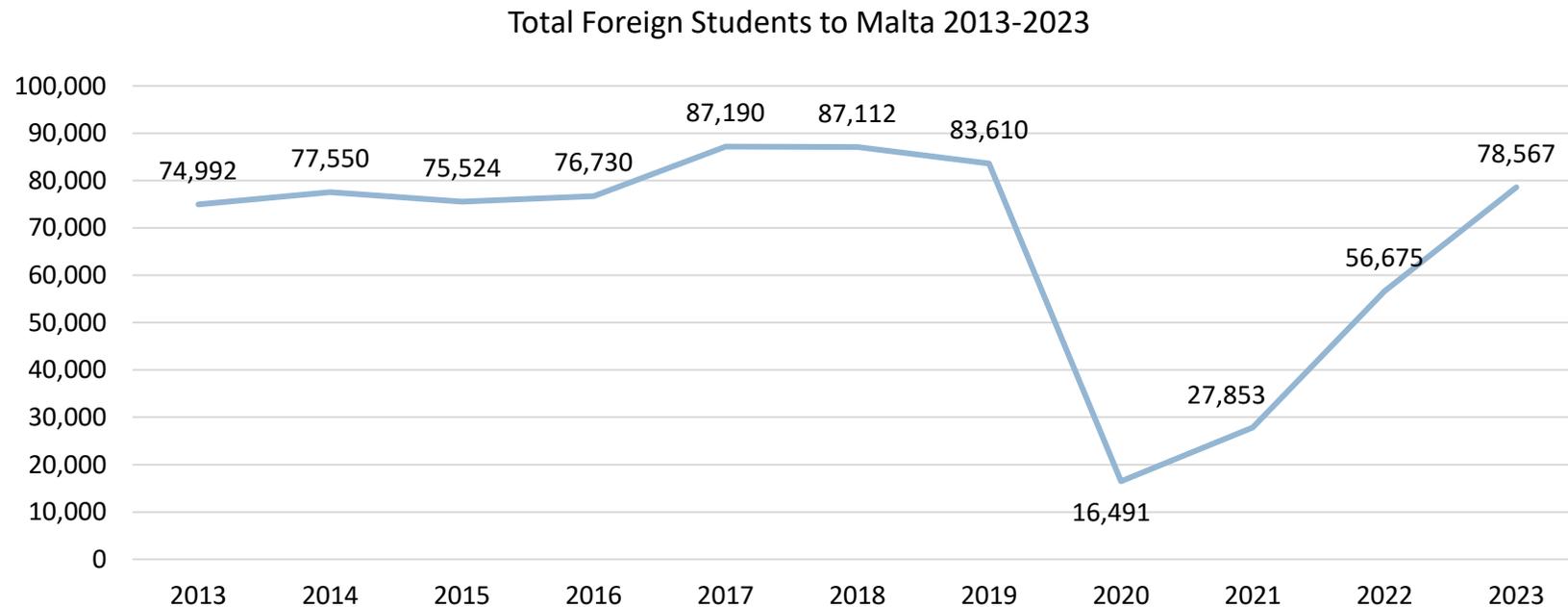
Summary of Performance

- In 2023, foreign students attending English language courses at local licensed English Language Teaching (ELT) schools amounted to 78,567, marking an increase of 21,892 or 38.6% over 2022.
- The largest share of students attending local licensed ELT schools in Malta came from Italy (27.8%), followed by Germany (10.4%).
- The most popular course uptake in local licensed ELT schools was General English: Standard at 73.1%.
- Foreign students enrolled in local licensed ELT schools accounted for 273,131 student weeks.
- In 2023, staff employed in local licensed ELT schools numbered 1,223, the majority being teaching/academic staff (50.7%).

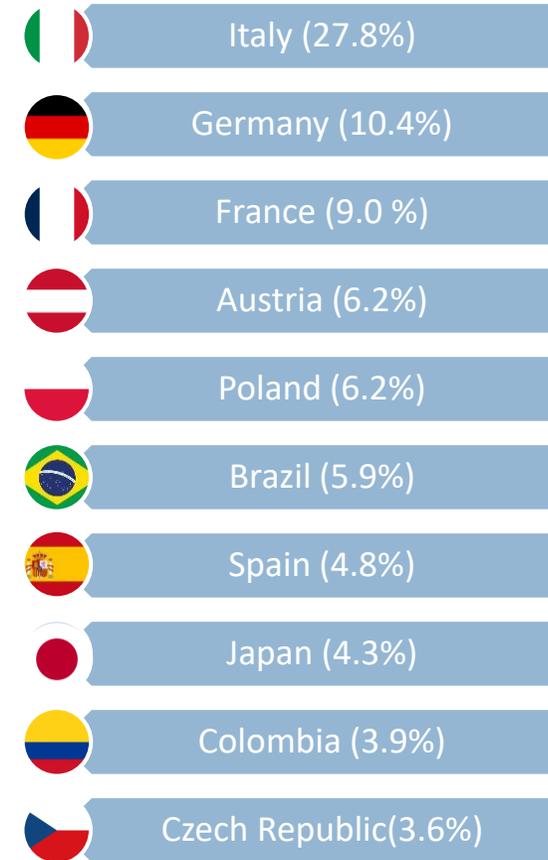
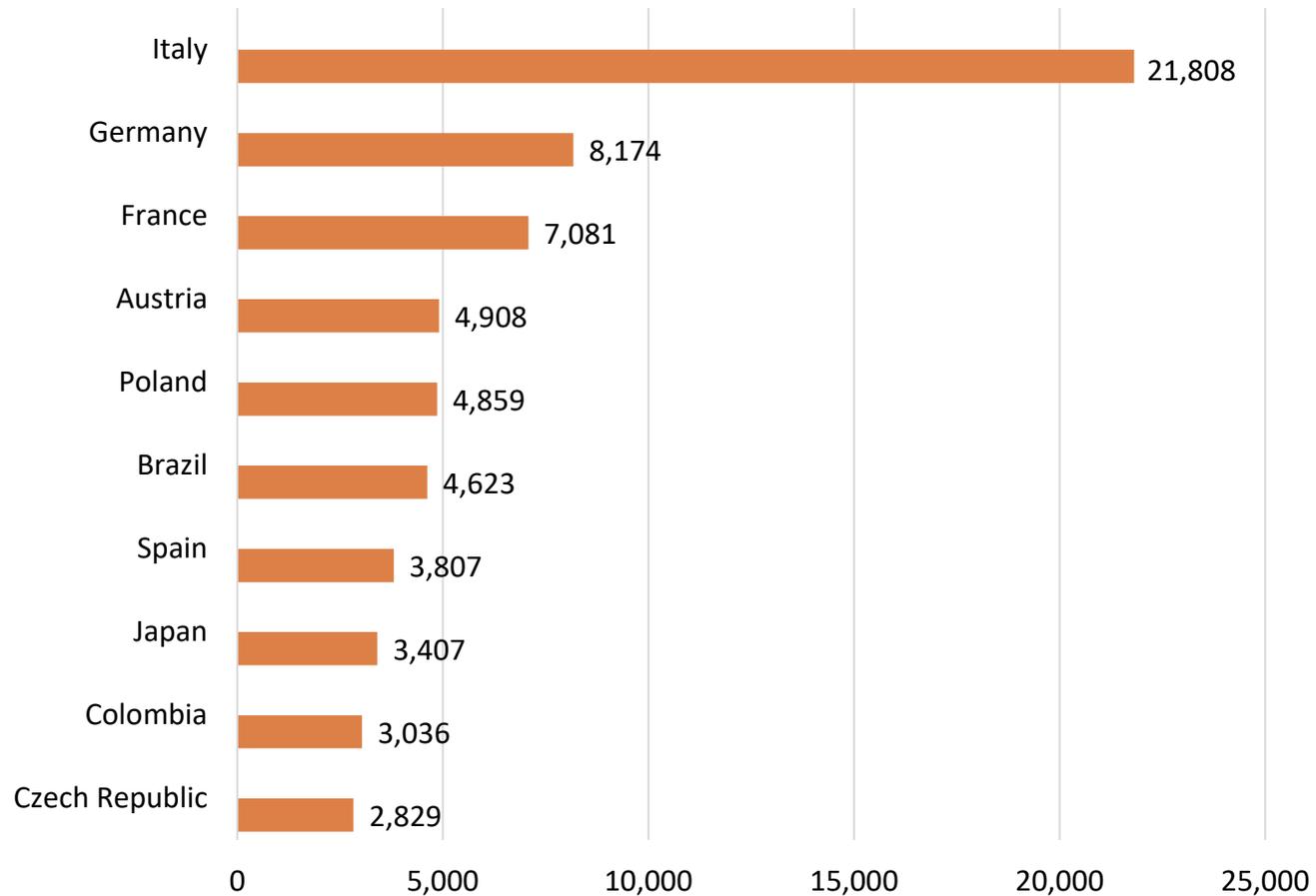


Total Foreign Students 2013-2023

- In 2023, foreign students following courses at local licensed English Language Teaching (ELT) schools amounted to **78,567**, an increase of 21,892 students or 38.6% over 2022 and reaching 94.0% of 2019 figures.



Top Source Markets



Timeseries of Top EL Source Markets

Timeseries of Foreign Students Following Courses in Local Licensed ELT Schools

	2018	2019	2020	2021	2022	2023	Abs. Change 2023/2022	% Change 2023/2022	2023 as a share of 2019
Italy	23,482	18,335	1,615	4,913	9,245	21,808	12,563	135.9%	118.9%
Germany	9,991	9,764	2,761	3,096	7,169	8,174	1,005	14.0%	83.7%
France	8,844	8,878	1,760	4,164	7,427	7,081	-346	-4.7%	79.8%
Austria	4,363	3,954	611	297	2,325	4,908	2,583	111.1%	124.1%
Poland	4,501	4,556	921	3,396	4,278	4,859	581	13.6%	106.7%
Brazil	4,360	5,000	921	155	2,088	4,623	2,535	121.4%	92.5%
Spain	3,971	3,760	1,270	1,925	3,111	3,807	696	22.4%	101.3%
Japan	3,508	4,106	1,153	1,521	3,029	3,407	378	12.5%	83.0%
Colombia	1,297	1,746	854	1,112	3,623	3,036	-587	-16.2%	173.9%
Czech Republic	1,558	1,741	527	1,000	2,090	2,829	739	35.4%	162.5%
Total	87,112	83,610	16,491	27,853	56,675	78,567	21,892	38.6%	94.0%

TEFL Students' Share Out of Inbound Tourists

Students studying English as a foreign language in Malta accounted for **2.6% of total inbound tourists** visiting Malta in year 2023.

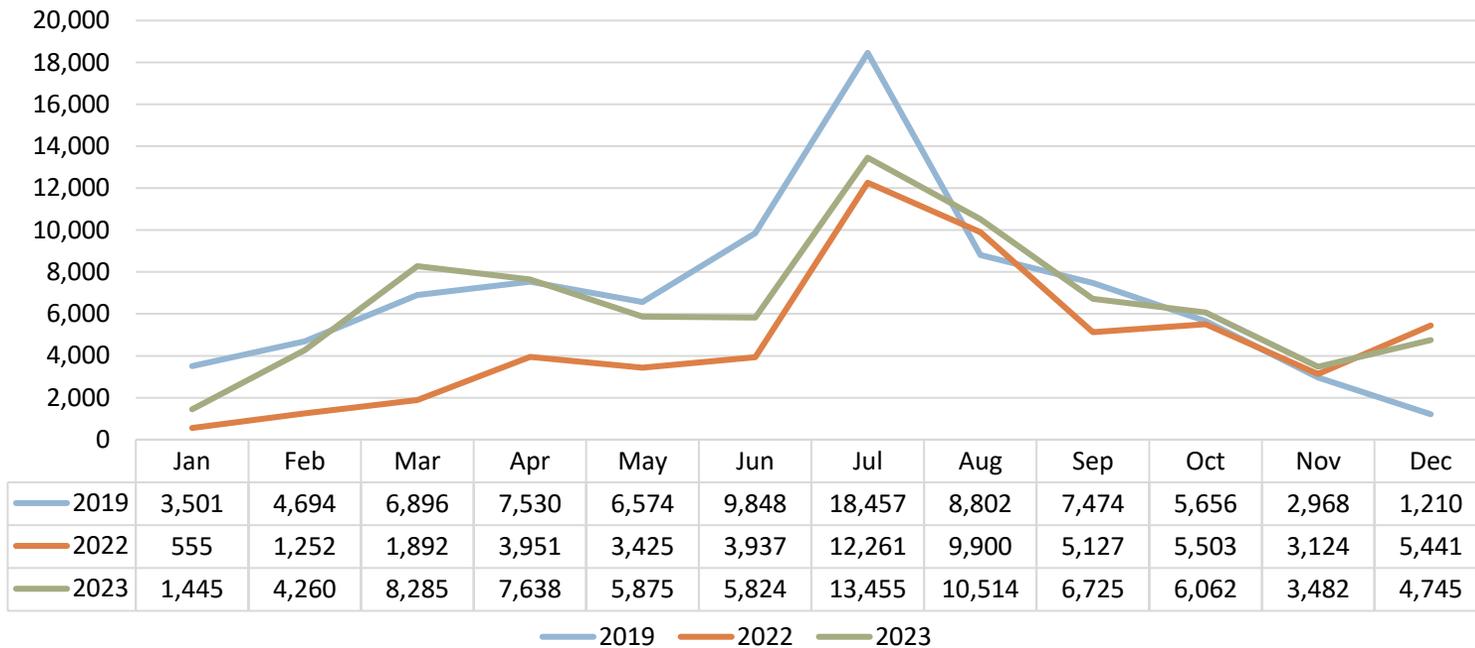
The largest share of students out of total inbound tourists came from Colombia, Brazil and Japan.

Main source markets	Students Year 2023	Inbound Tourists Year 2023	% of Students per incoming tourists
Italy	21,808	547,991	4.0%
Germany	8,174	218,540	3.7%
France	7,081	286,088	2.5%
Austria	4,908	51,880	9.5%
Poland	4,859	167,113	2.9%
Brazil	4,623	15,309	30.2%
Spain	3,807	114,513	3.3%
Japan	3,407	11,796	28.9%
Colombia	3,036	3,958	76.7%
Czech Republic	2,829	31,966	8.9%
Turkey	1,849	13,767	13.4%
Switzerland	1,530	57,791	2.6%
Hungary	1,076	49,848	2.2%
South Korea	940	4,352	21.6%
Slovakia	845	25,390	3.3%
Total	78,567	2,975,670	2.6%

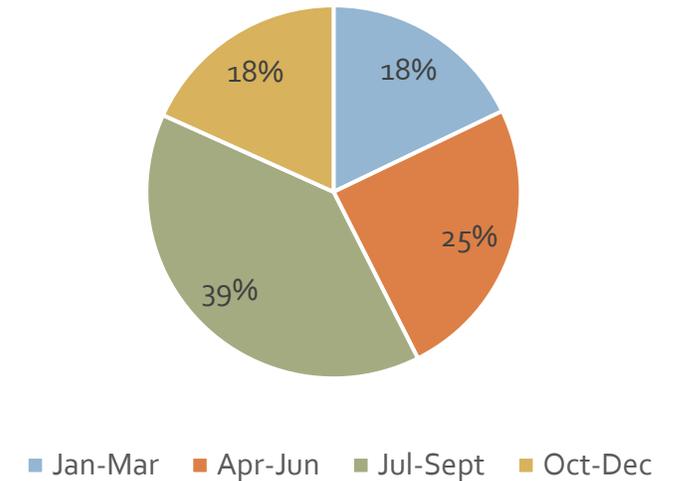
Note: EL students are based on Country of Citizenship' of students. Inbound tourists are based on the tourists' Country of Residence.

Seasonality of Foreign Students

TEFL Students Visiting Malta by Month



Seasonality of TEFL Segment Year 2023



July continued to be the busiest month for local licensed ELT schools, accounting for 17.2% of the total (excluding students who followed a course online). This was followed by the month of August at 13.4%.

Student Weeks by Age and by Gender

- In 2023, the total number of student weeks amounted to 273,131 weeks.
- The average number of student weeks stood at 3.5 weeks.
- Students aged 26 to 35 years had the highest average length of stay at 7.5 weeks.

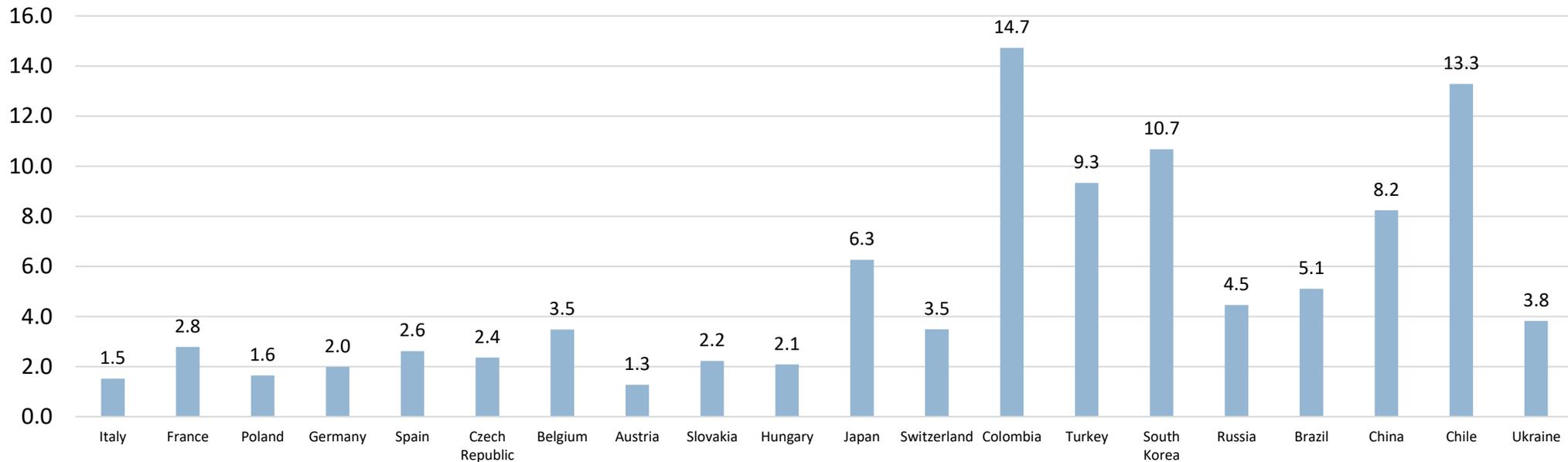
Age Category	15 and under	16-17	18-25	26-35	36-49	50 and over	Total		Students	Student Weeks	Average length of stay
Student weeks*	35,838	33,600	87,578	65,867	35,554	14,695	273,131	Total (excluding remote learning)	78,310	270,460	3.5
Students*	22,224	17,475	15,069	8,785	8,934	6,080	78,567	Remote learning	257	2,671	10.4
Average number of student weeks by age group	1.6	1.9	5.8	7.5	4.0	2.4	3.5	Total (including remote learning)	78,567	273,131	3.5

*Both the figures of 'students' weeks' and 'students' include 'remote learning'.

Average Number of Student Weeks by Market

With an average of 14.7 weeks, students from Colombia recorded the highest number of student weeks per student, followed by Chilean students at 13.3 weeks and South Korean students at 10.7 weeks.

Average number of student weeks per student



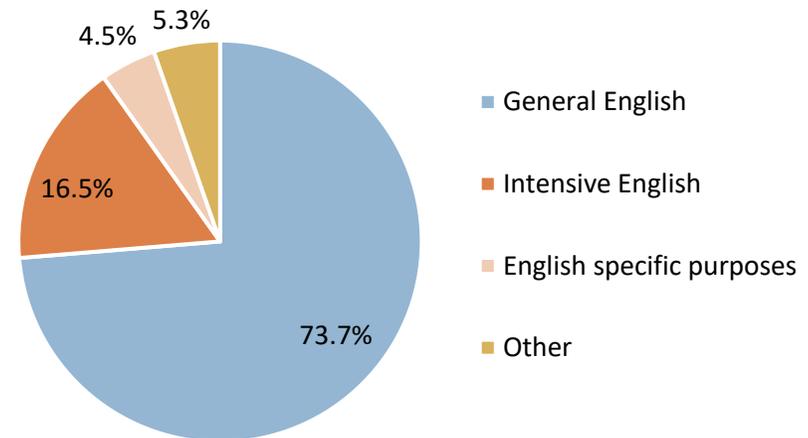
Type of Course Followed

The most popular course uptake in local licensed ELT schools was 'General English' with a total of 57,894 students, or 73.7% out total students.

This was followed by the 'Intensive' course, with 16.5% out of total students.

'Other', with a share of 5.3%, includes exam preparation courses, one-to-one lessons, combination of courses and other courses.

Share of students by type of course followed
Year 2023

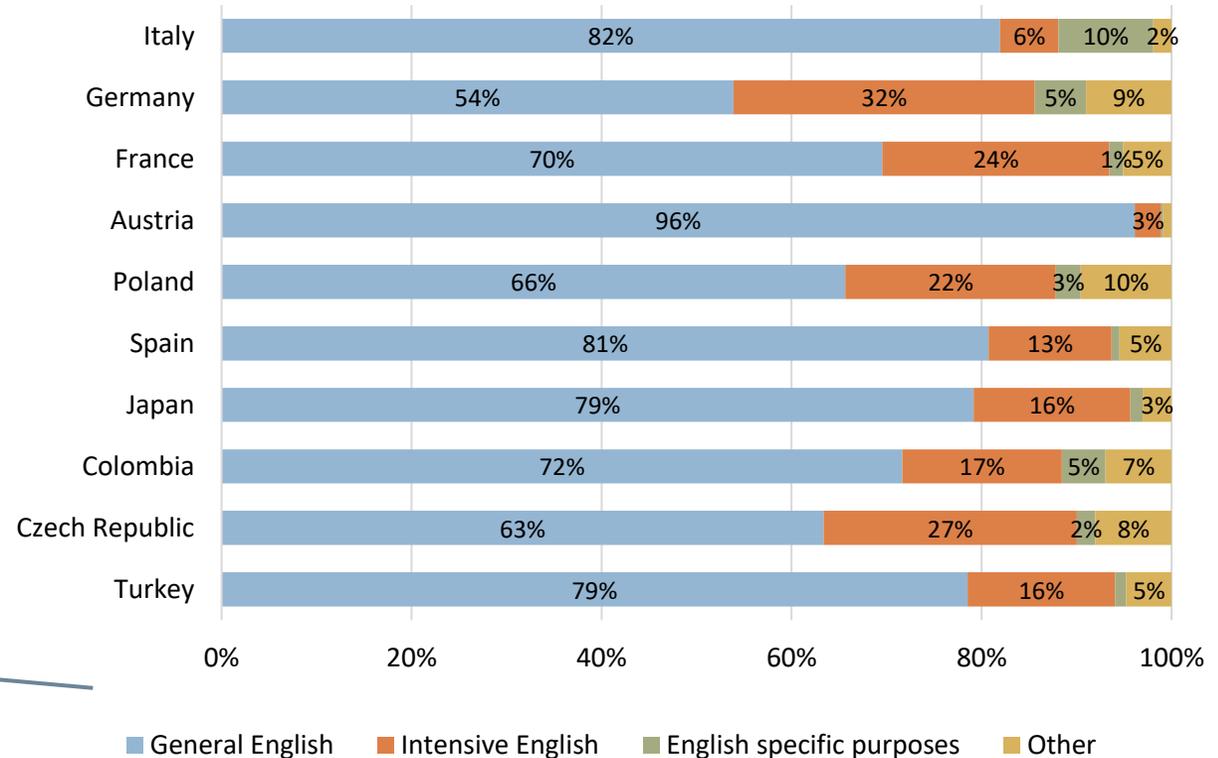


Type of Course Followed of Main Markets

The 'General English' course was the most popular intake across all markets. This stood highest amongst Austrian, Italian and Spanish tourists.

This was followed by the 'Intensive English' course; German students had the largest share at 35%.

Share of students by market and by type of course followed
Year 2023

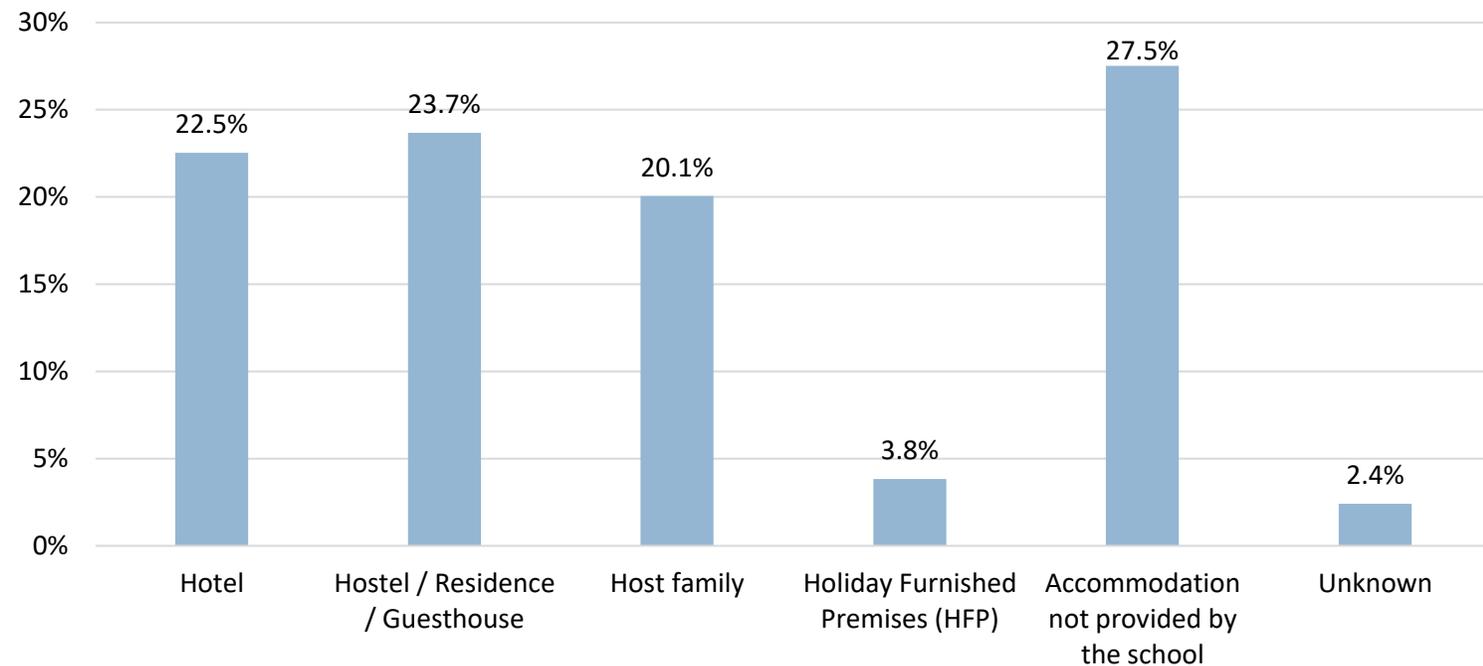


Type of Accommodation Used

- The larger share of students utilised accommodation not provided by the school.
- 23.7% stayed in a hostel, residence or guesthouse.
- 1 out of 5 students stayed with a host family while 22.5% used hotel accommodation.

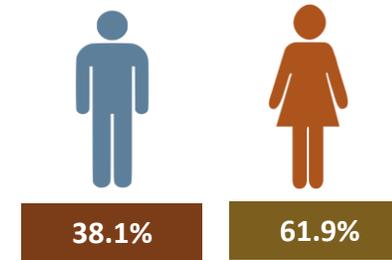
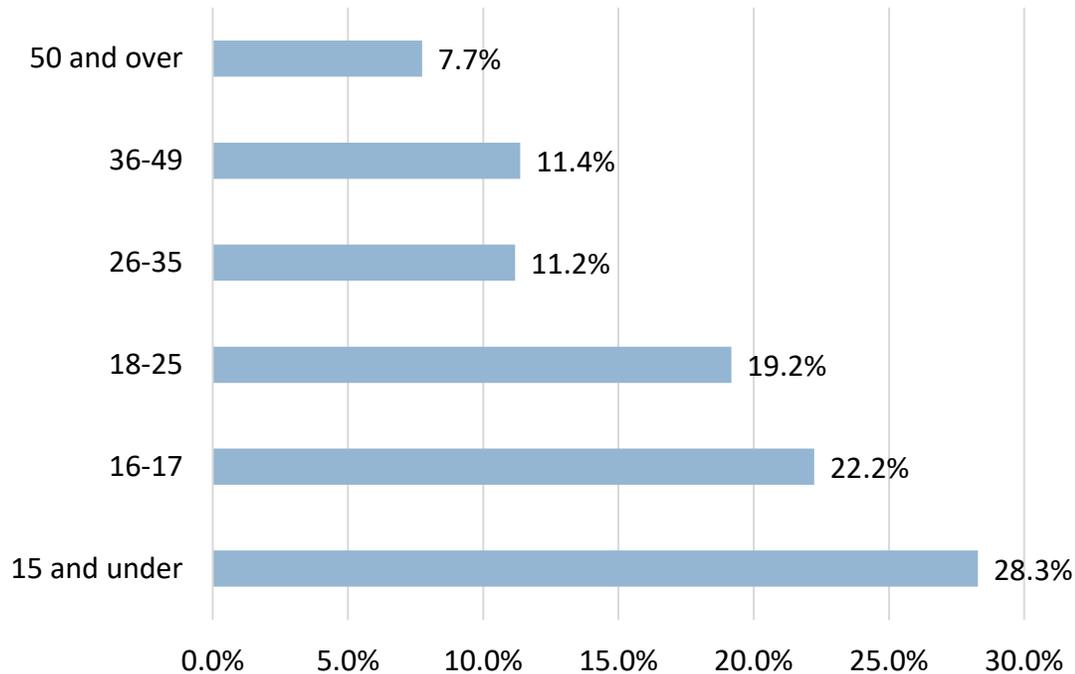


Type of Accommodation Used by Foreign Students following courses in local licensed ELT schools in Year 2023



Student Population by Gender and Age Group

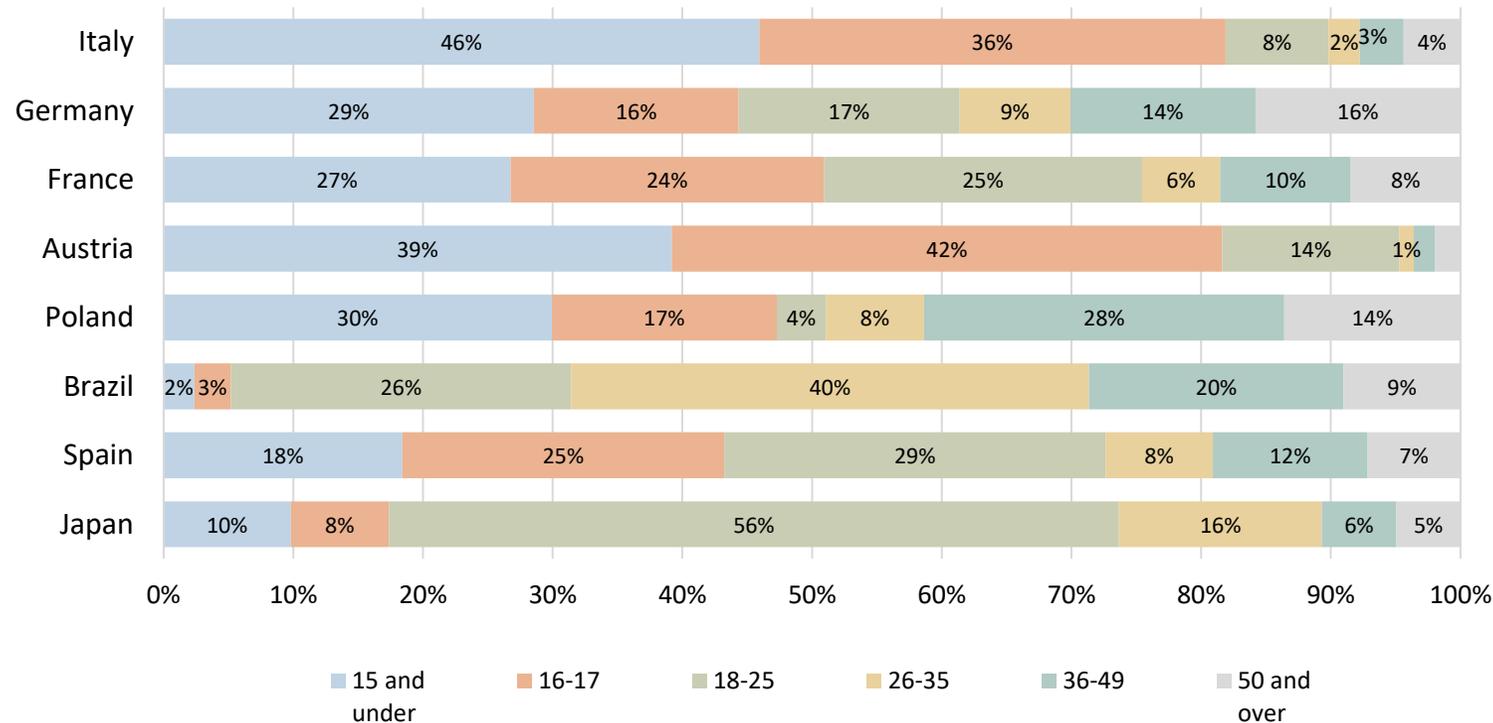
Share of student population by age group



- Female students outnumber males and accounted for 61.9% of the entire student population. Female dominance is prevalent across all age categories.
- The largest share of students were 15 years or under at 28.3%, closely followed by the 18 to 25 age bracket at 19.2%.

Age Group of Main Source Markets

Student Population by Age Group – Year 2023



Out of the top source TEFL markets, the larger share of Italians, Germans, French, and Polish were 15 years or under.

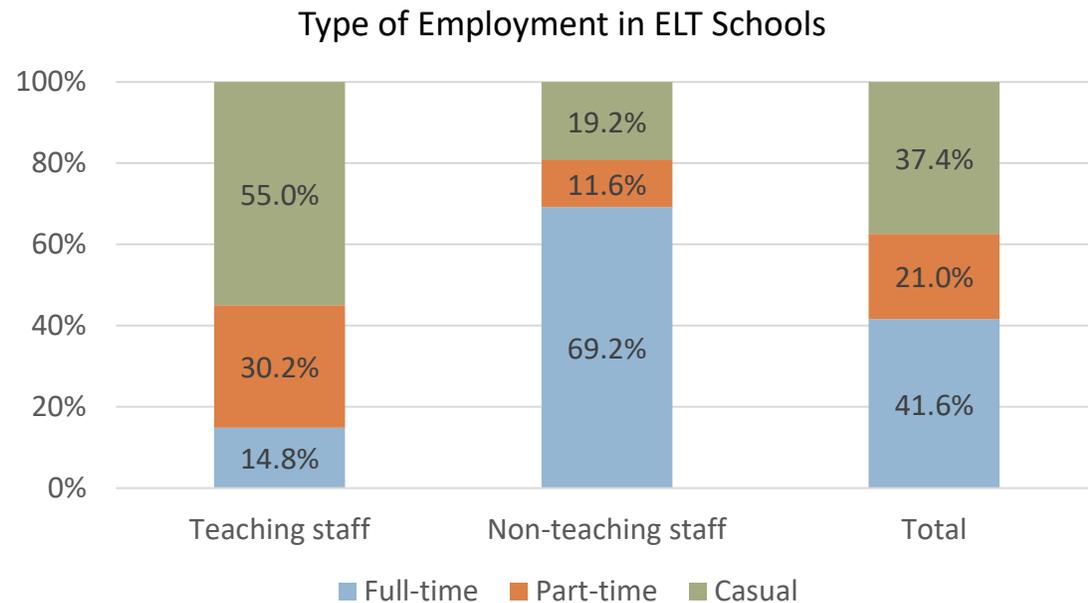
Around 2 out of 5 of Austrians were 16 to 17 years of age.

3 out of 5 Japanese, were between 18 to 25 years of age.

The larger share of Japanese students were 18 to 25 years of age.

Type of Employment in ELT Schools

- In 2023, teaching and non-teaching staff in ELT schools numbered 1,223, of which 50.7% were teaching staff and 49.3% were non-teaching staff.
- The majority of teaching staff (55%) were casual workers whilst the larger share of non-teaching staff (69%) were full-timers.



Share of Teaching and Non-teaching staff at ELT Schools

