



THE ENGLISH LANGUAGE TRAVEL MARKET IN MALTA

Year 2024

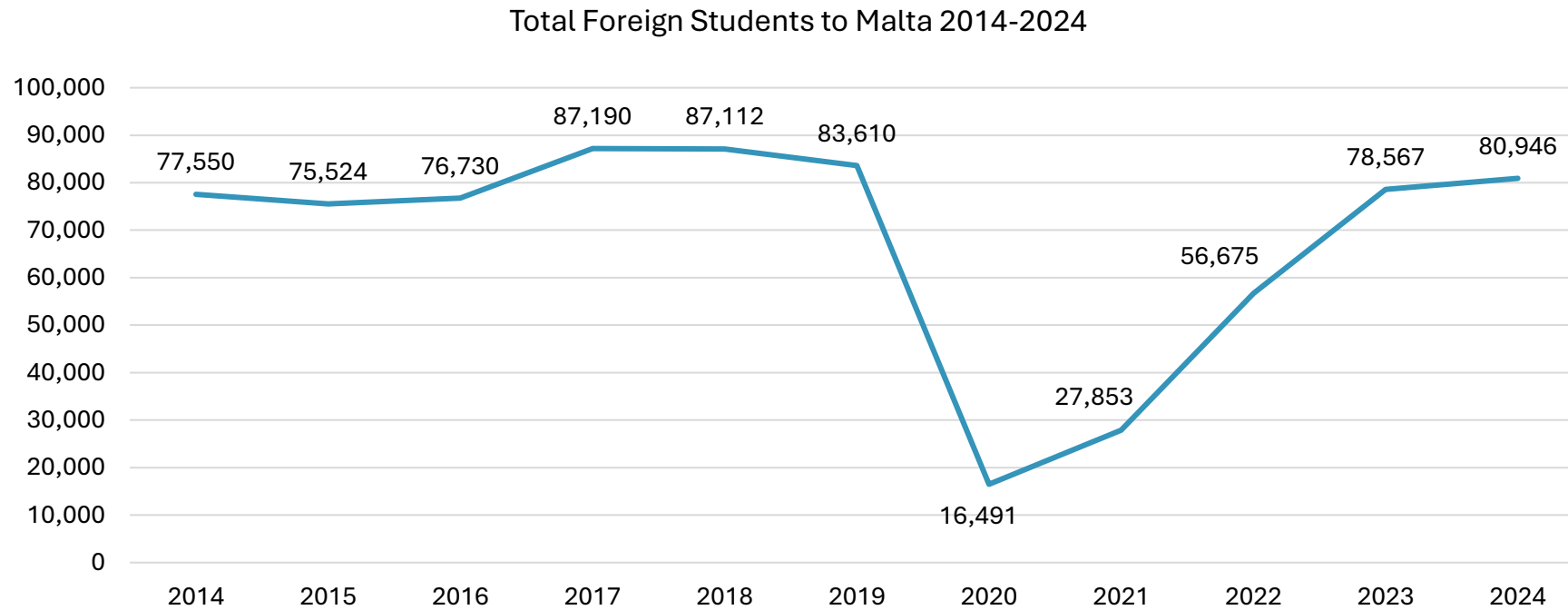
Summary of Performance

- In 2024, **80,946 foreign students** attended English language courses at 33 local licensed English Language Teaching (ELT) schools, an increase of 2,379 (**+3.0 per cent**) over 2023.
- The largest share of language students was in the **'15 and under'** age bracket, accounting for 28.1 per cent of the total students following ELT courses, followed by the **'16 and 17-year-old'** age group, which accounted for 22.0 per cent.
- The most popular course uptake in local licensed ELT schools was **'General English: Standard'** at 77.0 per cent.
- Foreign students enrolled in local licensed ELT schools accounted for **256,868 student weeks**.
- In 2024, staff employed in local licensed ELT schools numbered 1,381, the majority being teaching/academic staff (53.8 per cent).

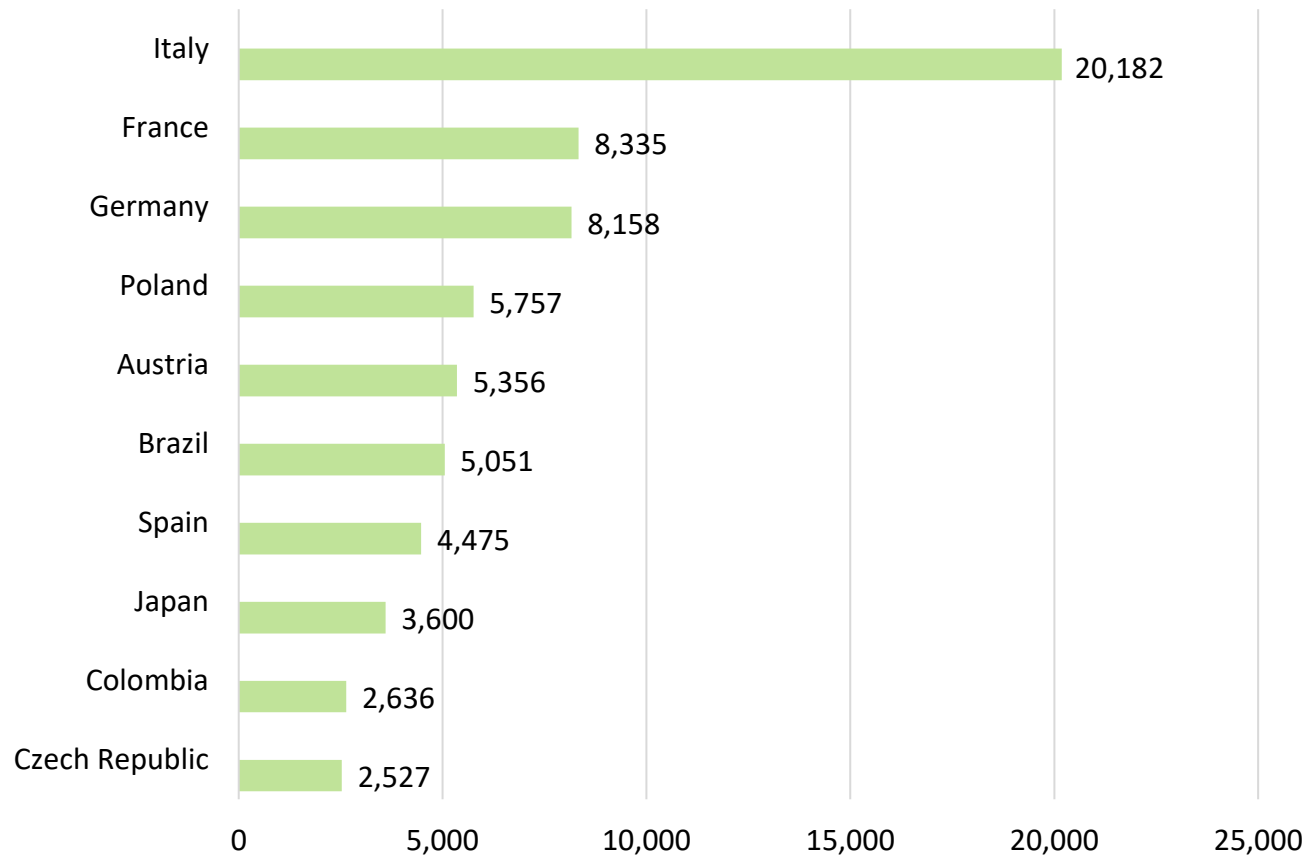


Total Foreign Students 2014-2024

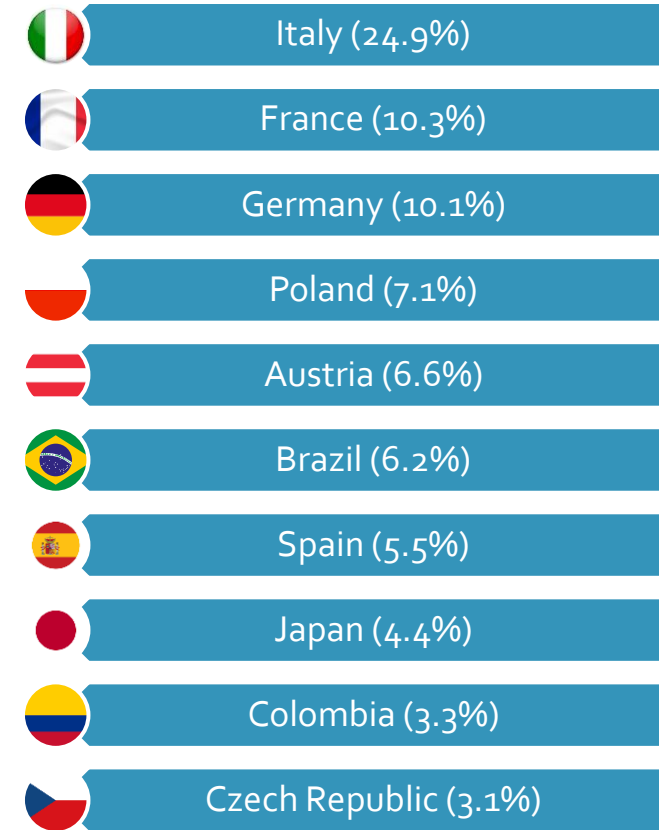
- In 2024, foreign students following courses at local licensed English Language Teaching (ELT) schools amounted to **80,946**, an increase of 2,379 students or 3.0% over 2023.



Top Source Markets



Market Shares



Top EL Source Markets 2019-2024

	2019	2022	2023	2024	Abs. Change 2024/2023	% Change 2024/2023	Market Share 2024
Italy	18,335	9,245	21,808	20,182	-1,626	-7.5%	24.9%
France	8,878	7,427	7,081	8,335	1,254	17.7%	10.3%
Germany	9,764	7,169	8,174	8,158	-16	-0.2%	10.1%
Poland	4,556	4,278	4,859	5,757	898	18.5%	7.1%
Austria	3,954	2,325	4,908	5,356	448	9.1%	6.6%
Brazil	5,000	2,088	4,623	5,051	428	9.3%	6.2%
Spain	3,760	3,111	3,807	4,475	668	17.5%	5.5%
Japan	4,106	3,029	3,407	3,600	193	5.7%	4.4%
Colombia	1,746	3,623	3,036	2,636	-400	-13.2%	3.3%
Czech Republic	1,741	2,090	2,829	2,527	-302	-10.7%	3.1%
Total	83,610	56,675	78,567	80,946	2,379	3.0%	100.0%

TEFL Students' Share Out of Inbound Tourists

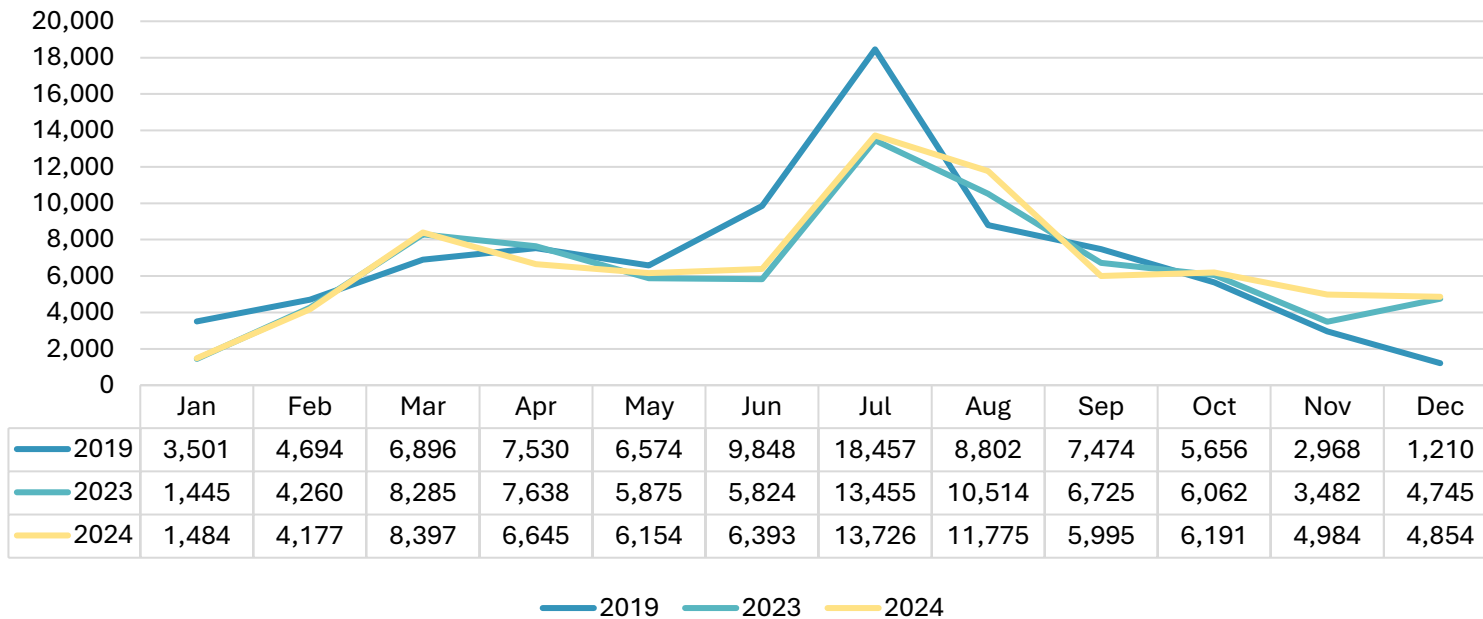
Students studying English as a foreign language in Malta accounted for **2.3% of total inbound tourists** visiting Malta in year 2024.

Note: Data for students and tourists are based on two different sources of data. EL students are based on Country of Citizenship' of students. Inbound tourists are based on the tourists' Country of Residence.

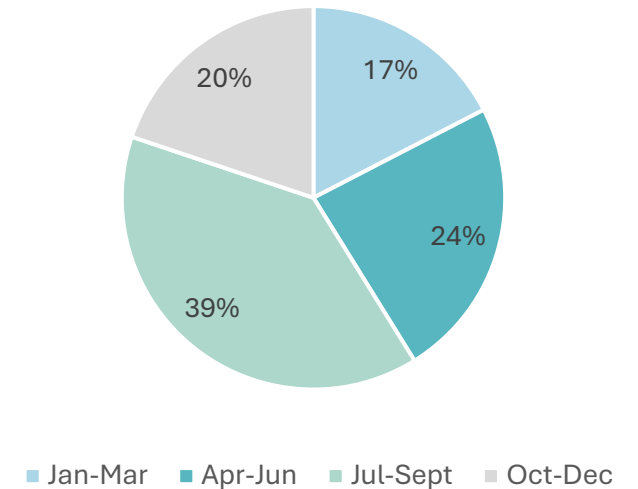
Main source markets	Students Year 2024	Inbound Tourists Year 2024	% of Students per incoming tourists
Italy	20,182	616,326	3.3%
France	8,335	295,396	2.8%
Germany	8,158	248,778	3.3%
Poland	5,757	264,479	2.2%
Austria	5,356	63,199	8.5%
Brazil	5,051	15,535	32.5%
Spain	4,475	132,081	3.4%
Colombia	2,636	5,778	45.6%
Czech Republic	2,527	34,836	7.3%
Turkey	1,841	18,959	9.7%
Switzerland	1,715	67,857	2.5%
Hungary	1,155	67,631	1.7%
South Korea	920	6,204	14.8%
Slovakia	898	31,448	2.9%
Total	80,946	3,563,618	2.3%

Seasonality of Foreign Students

TEFL Students Visiting Malta by Month



Seasonality of TEFL Segment Year 2024



July continued to be the busiest month for local licensed ELT schools, accounting for 17.0% of the total (excluding students who followed a course online). This was followed by the month of August at 14.6%.

Student Weeks by Age and by Gender

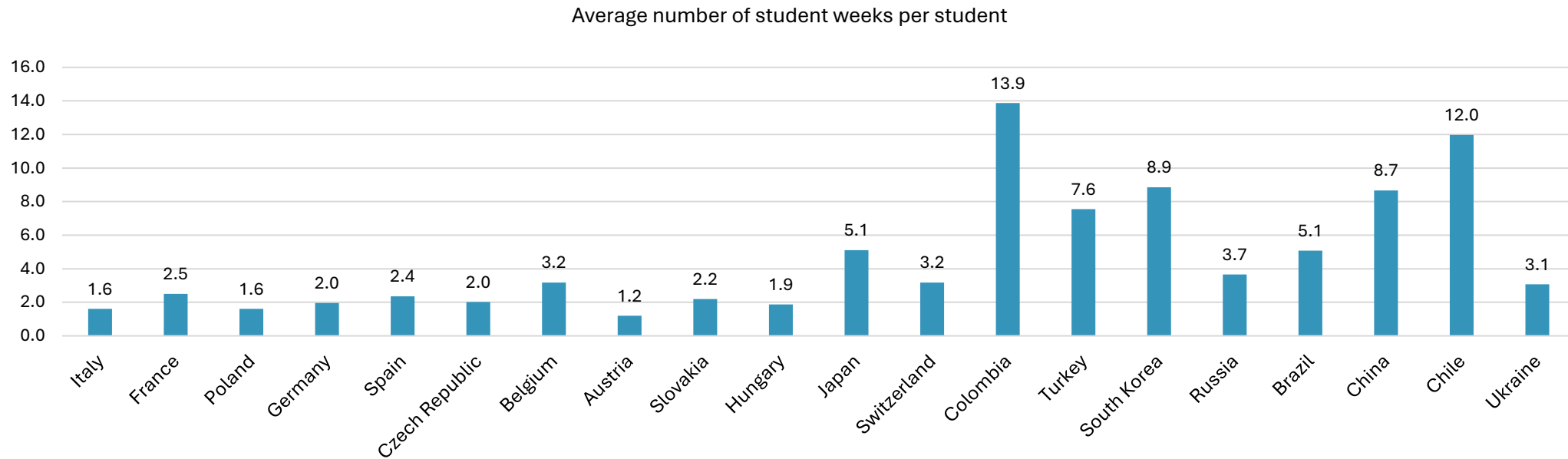
- In 2024, the total number of student weeks amounted to 256,867 weeks.
- The average number of student weeks stood at 3.2 weeks.
- Students aged 26 to 35 years had the highest average length of stay at 6.7 weeks.

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*	37,872	35,782	77,493	55,186	32,937	17,599	256,868	Total (excluding remote learning)	80,775	256,462	3.2
Students*	22,747	17,825	16,026	8,222	8,889	7,237	80,946	Remote learning	171	406	2.4
Average number of student weeks by age group	1.7	2.0	4.8	6.7	3.7	2.4	3.2	Total (including remote learning)	80,946	256,868	3.2

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

Average Number of Student Weeks by Market

With an average of 13.9 weeks, students from Colombia recorded the highest number of student weeks per student, followed by Chilean students at 12.0 weeks and South Korean students at 8.9 weeks.



Type of Course Followed

The most popular course uptake in local licensed ELT schools was 'General English: Standard' with a total of 62,299 students, or 77.0% out total students.

This was followed by the 'Intensive' course, with 14.8% out of total students.

'Other', with a share of 5.4%, includes exam preparation courses, one-to-one lessons, combination of courses and other courses.

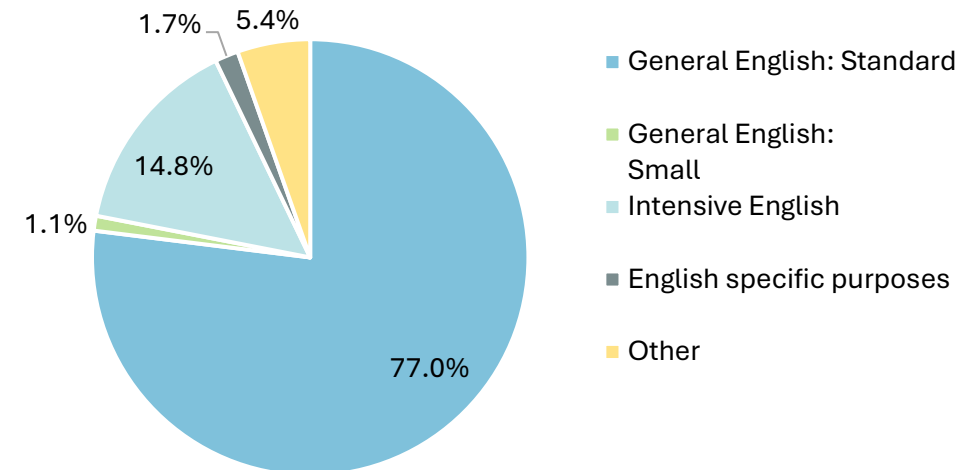
Note:

'English specific' includes business English

² Includes business English.

³ Includes exam preparation courses, one-to-one lessons, combination of courses, and other courses.

Share of students by type of course followed
Year 2024

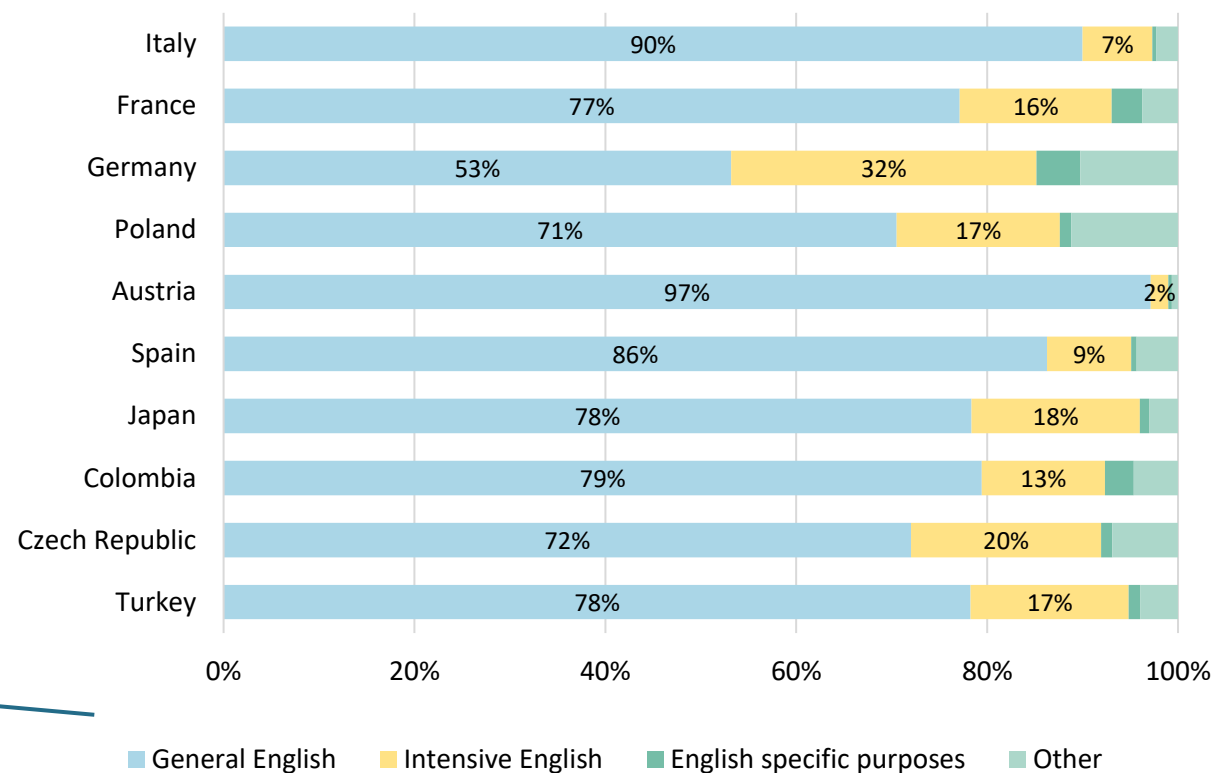


Type of Course Followed of Main Markets

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

This was followed by the 'Intensive English' course; German students had the largest share at 32%.

Share of students by market and by type of course followed
Year 2024

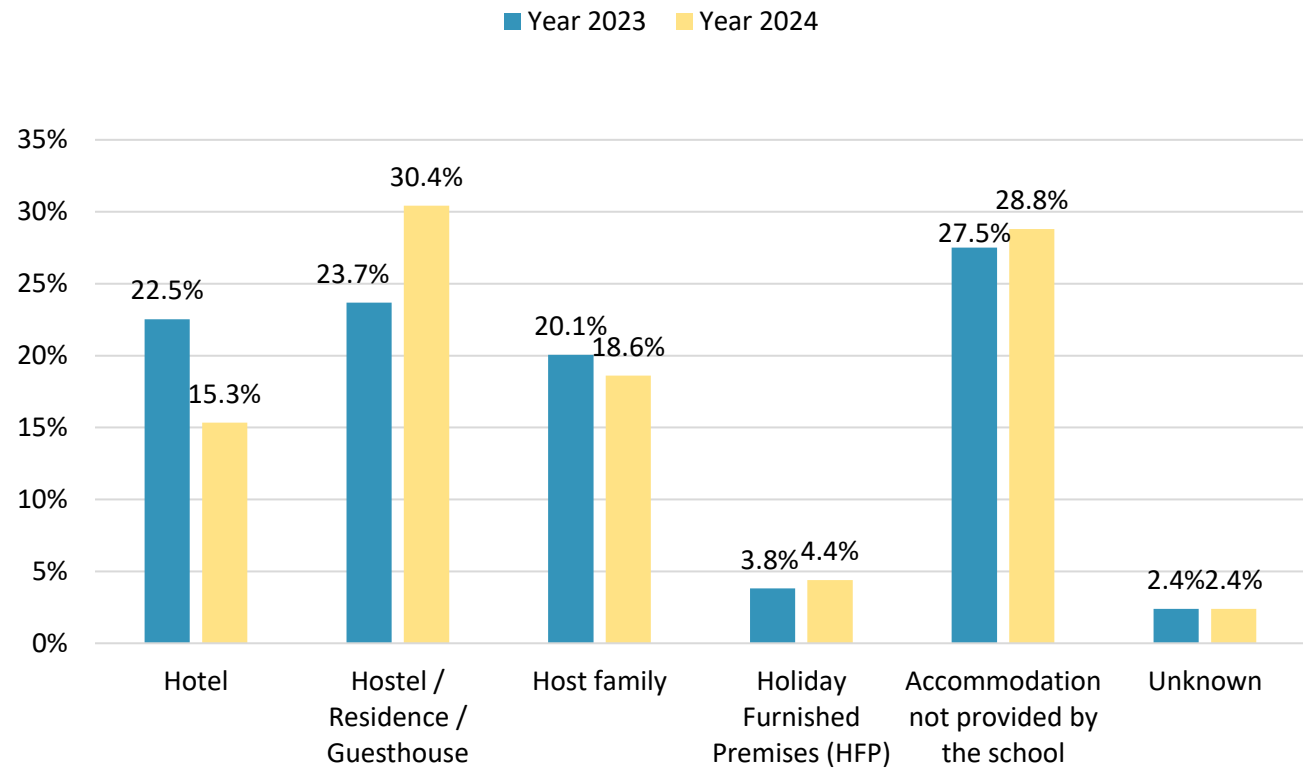


Type of Accommodation Used

- In year 2024, the preferred type of accommodation of TEFL students was a hostel/residence/guesthouse. This share rose from 23.7% in 2023 to 30.4% in 2024.
- This was followed by nearly 29% who chose to stay in an accommodation not provided by the school.
- Meanwhile, 18.6% stayed with a host family and 15.3% in a hotel type of accommodation, both of which registered a decline in market share when compared with year 2023.



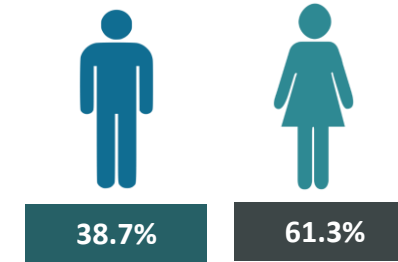
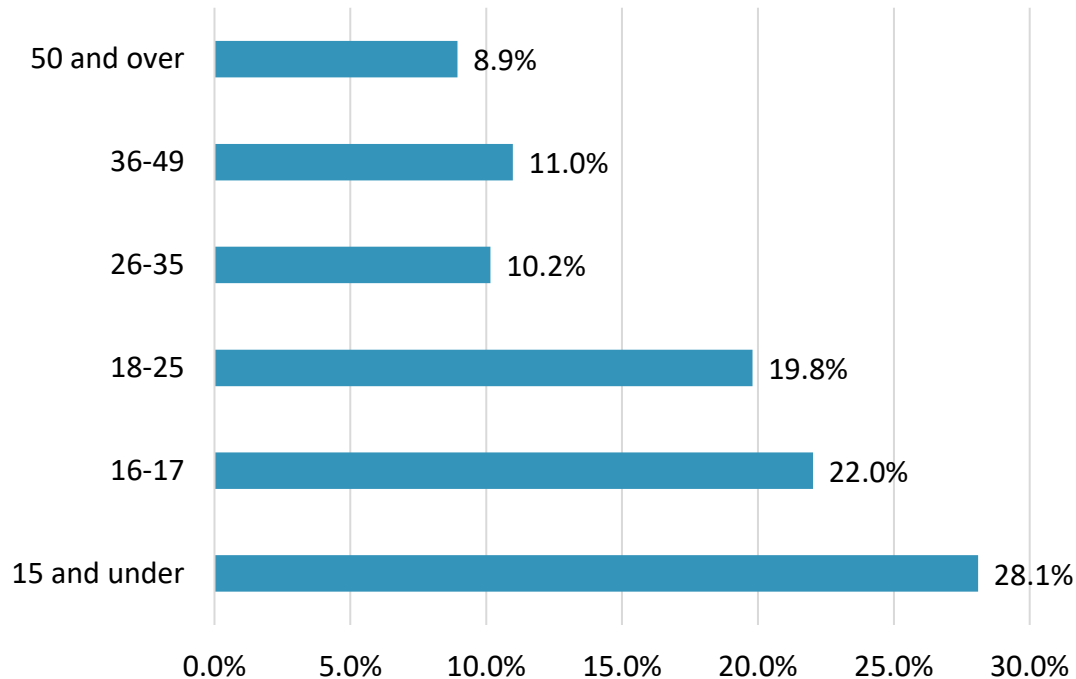
Share of Foreign Students by Type of Accommodation Used



TEFL Year 2024

Student Population by Gender and Age Group

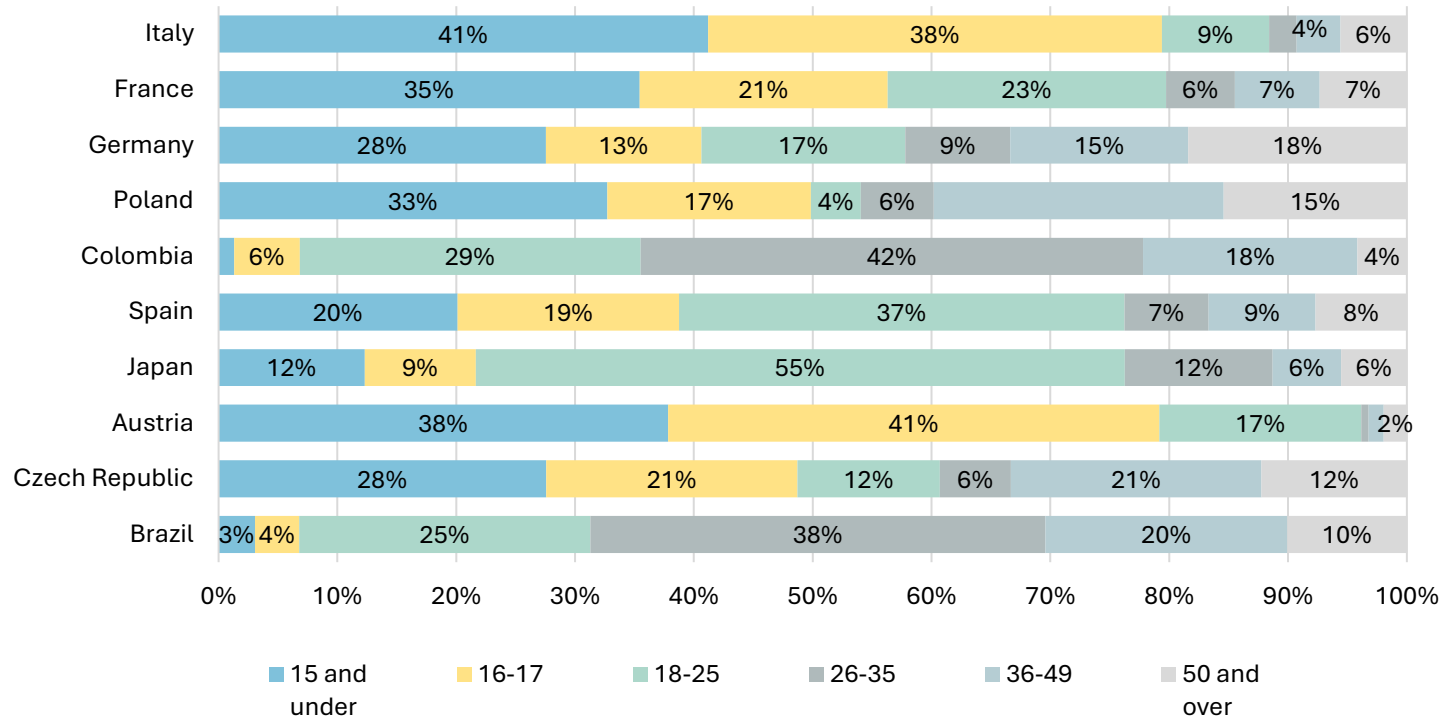
Share of student population by age group



- Female students outnumber males and accounted for 61.3% of the entire student population. Female dominance is prevalent across all age categories.
- The largest share of students were 15 years or under at 28.1%, followed by the 16-17 age bracket at 22.0%.

Age Group of Main Source Markets

Student Population by Age Group – Year 2024



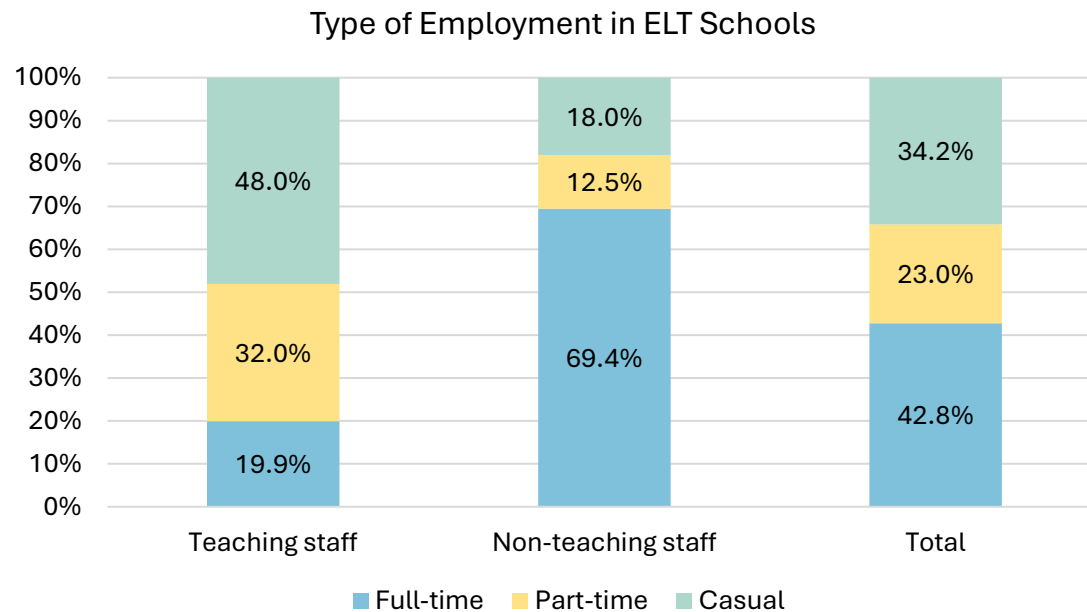
Out of the top source TEFL markets, the larger share of Italians, Germans, French, and Polish were 15 years or under.

Around 2 out of 5 of Austrians were 16 to 17 years of age, followed by 38% of Italians.

55% Japanese students, were between 18 to 25 years of age, comprising the larger share of students from Japan.

Type of Employment in ELT Schools

- In 2024, staff employed in local licensed ELT schools numbered 1,381, of which 53.8% were teaching/academic staff.
- The larger share of teaching staff (48.0%) were casual workers whilst the larger share of non-teaching staff (69.4%) were full-timers.



Share of Teaching and Non-teaching staff at ELT Schools

