

## English Language Travel Industry Report 2023

### Key highlights

Following the difficult Covid-19 pandemic which brought to a sudden halt the growth of the English Language Teaching (ELT) sector, statistics for 2023 issued by NSO reported annual student arrivals of 78.6k, which is 6.1% lower compared to the 83.6k registered in 2019.

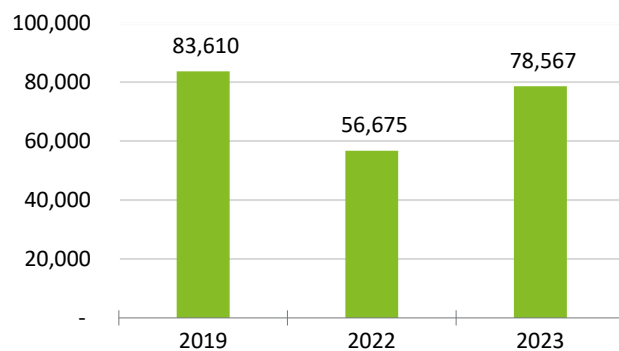
On the other hand, student weeks increased by 15.2% in 2023 when compared to 2019. This increase in student weeks was due to longer stays during the shoulder months. The average length of stay over this period increased from 19.8 day in 2019 s to 24.3 days in 2023.

The English Language Travel (ELT) sector in 2023 accounted for approximately 9.4% of total tourist guest nights and around 5.8% of total tourist expenditure. NSO place indicative total expenditure by ELT students in 2023 at approximately €155 million.

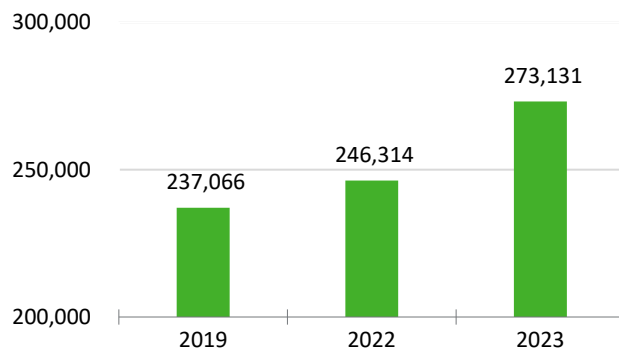
The ELT sector remains an important niche market for the tourism industry in Malta. The sector plays an important role in the diversification strategy of the local tourism sector to promote a more diverse profile of visiting tourists and less reliance on traditional core inbound markets.

During 2023, the sector continued to attract students from markets which are not traditional tourist source markets for Malta, such as Brazil, Japan and Colombia. Student arrivals from non-EU/EEA countries accounted for 26% of total student arrivals but represented 59% of total student weeks due to the longer training programmes followed by this cohort.

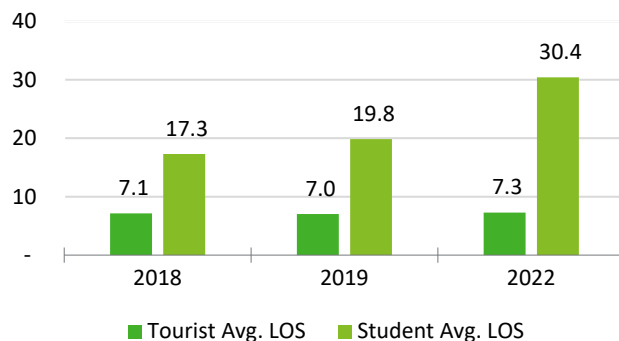
Student arrivals\*



Student weeks\*



Average length of stay (days)\*

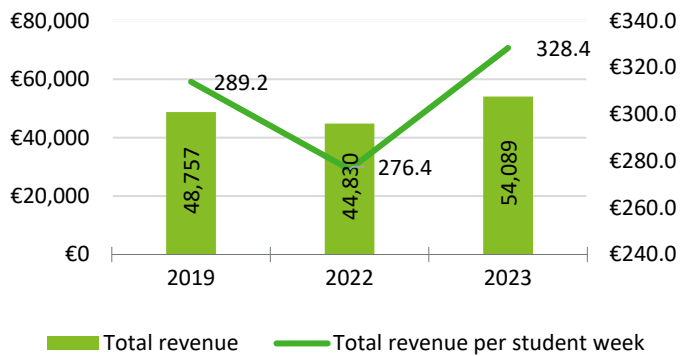


The annual FELTOM survey carried out by Deloitte shows that FELTOM affiliated schools reported increases in total revenue in 2023 of 10.9% when compared to 2019. This revenue growth was mainly driven by increased tuition and accommodation fees, while student weeks were only marginally lower by 2.3%.

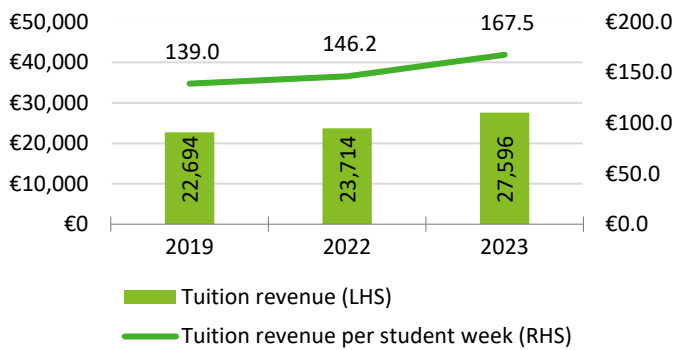
Tuition revenue per student week increased by 17.7% relative to 2019. Accommodation revenue also saw an increase of 7.1% compared to 2019 levels.

Other ancillary revenue generated through activities decreased by 4.8%, from €31.9 per student week in 2019 to €31.1 in 2023.

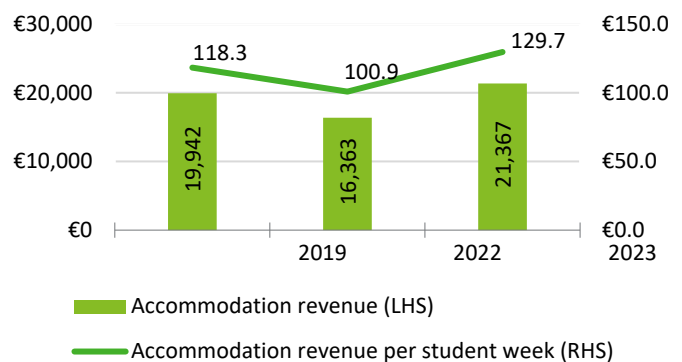
**Total revenue (€000s)**



**Total tuition revenue (€000)**

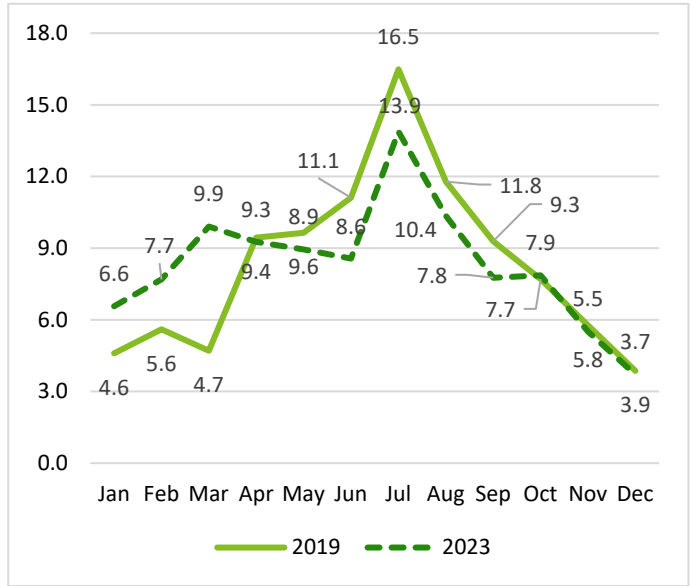


**Total accommodation revenue (€000)**



There has been a clear reduction in the seasonality of ELT students, with Quarters 1 and 4 combined accounting for 41.2% of total student weeks in 2023 compared to 32% in 2019. This places the ELT sector as an important niche to drive tourist volumes in the traditional shoulder months.

Monthly student weeks as % of total student weeks



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