

THE ENGLISH LANGUAGE TRAVEL MARKET IN MALTA

YEAR 2025

Summary of Performance

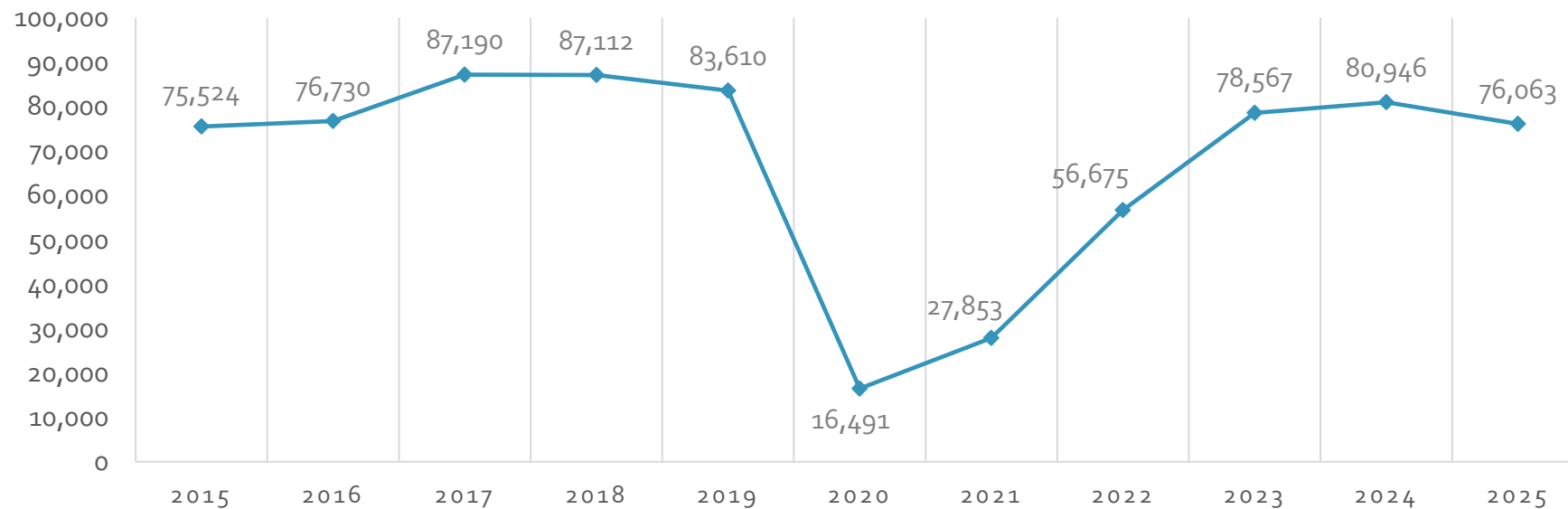
- In 2025, **76,063 foreign students** attended English language courses at 34 local licensed English Language Teaching (ELT) schools, a drop of 4,883 (-6.0%) over 2024.
- Foreign students enrolled accounted for **262,255 student weeks**, an increase of 2.1% when compared to 2024.
- The largest share of language students was in the 15- and under age bracket, accounting for 29.2% of the total students following ELT courses, followed by the 16 and 17-year-old age group, which accounted for 20.9%.
- Staff employed in local licensed ELT schools numbered 1,376, the majority being teaching/academic staff (51.7%).



Total Foreign Students 2015-2025

- In 2025, foreign students following courses at local licensed English Language Teaching (ELT) schools amounted to **76,063**, a drop of 4,883 students or 6.0% over 2024.

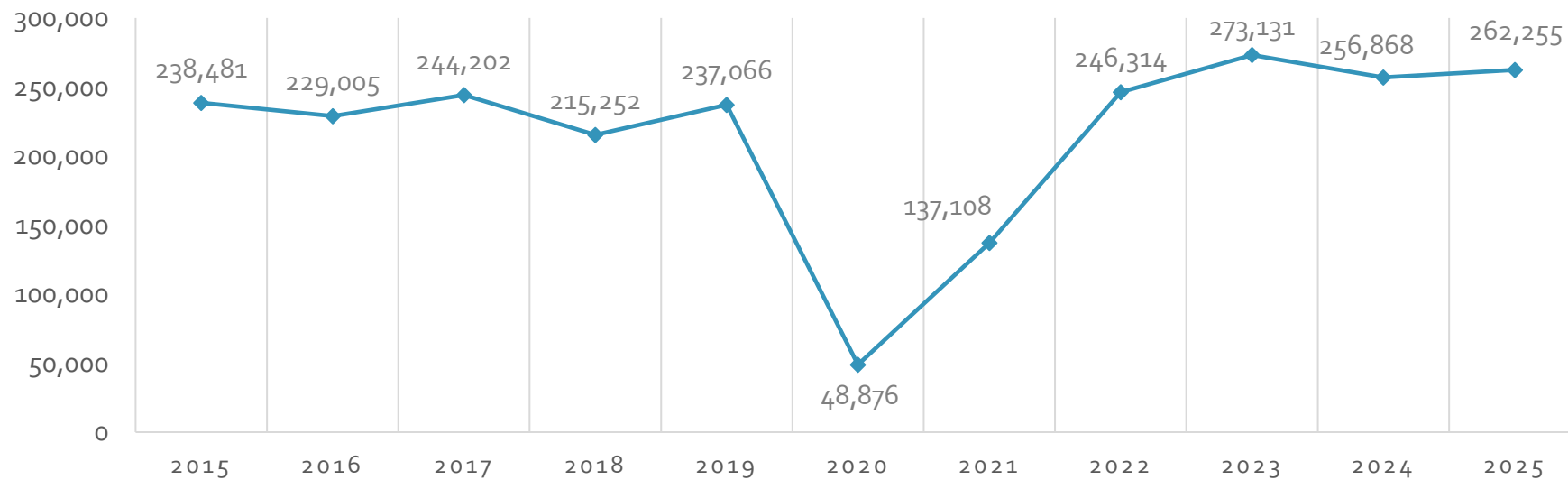
Total Foreign Students to Malta 2015-2025



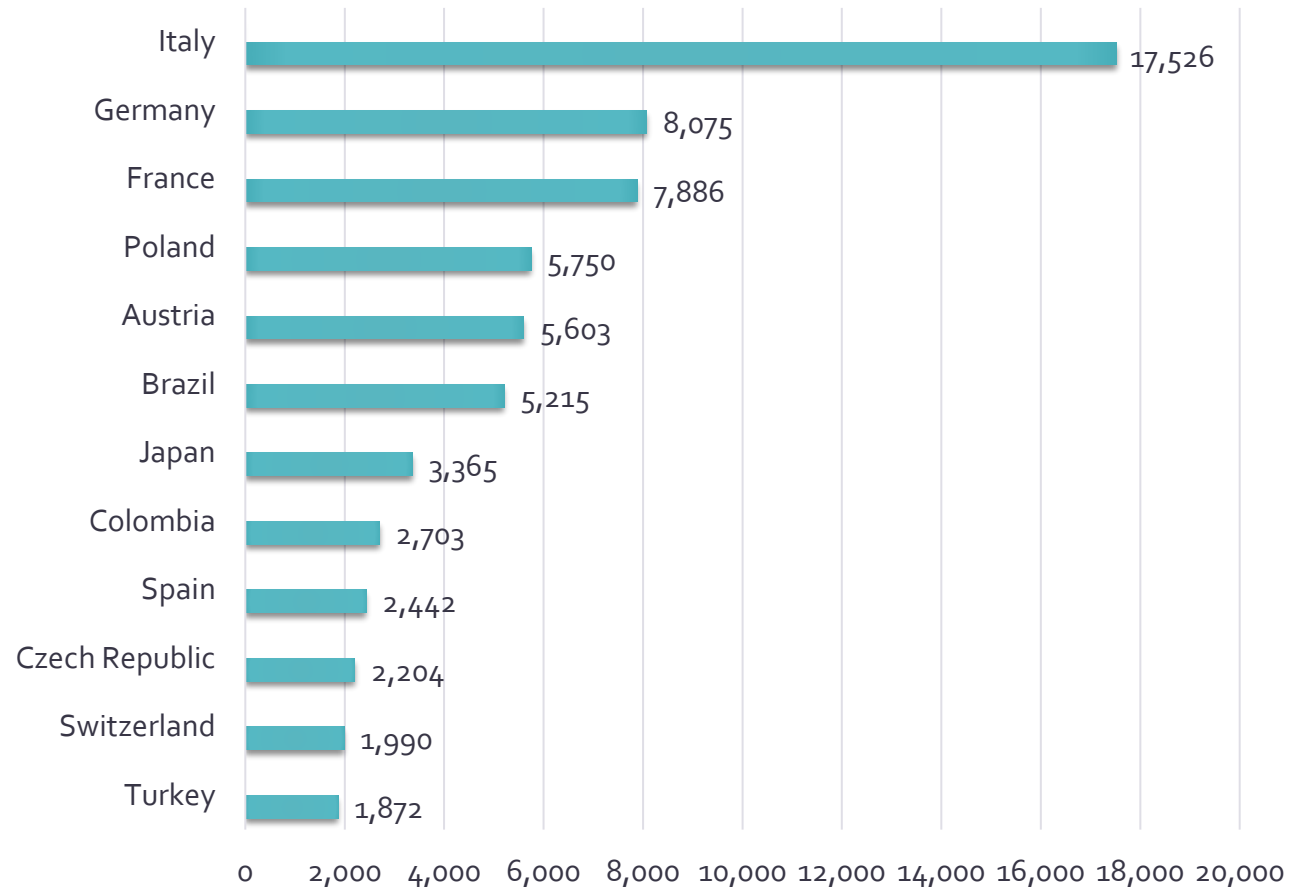
Total Foreign Students Weeks 2015-2025

- Total student weeks amounted to **262,255 weeks**, an increase of 2.1% when compared to 2024.

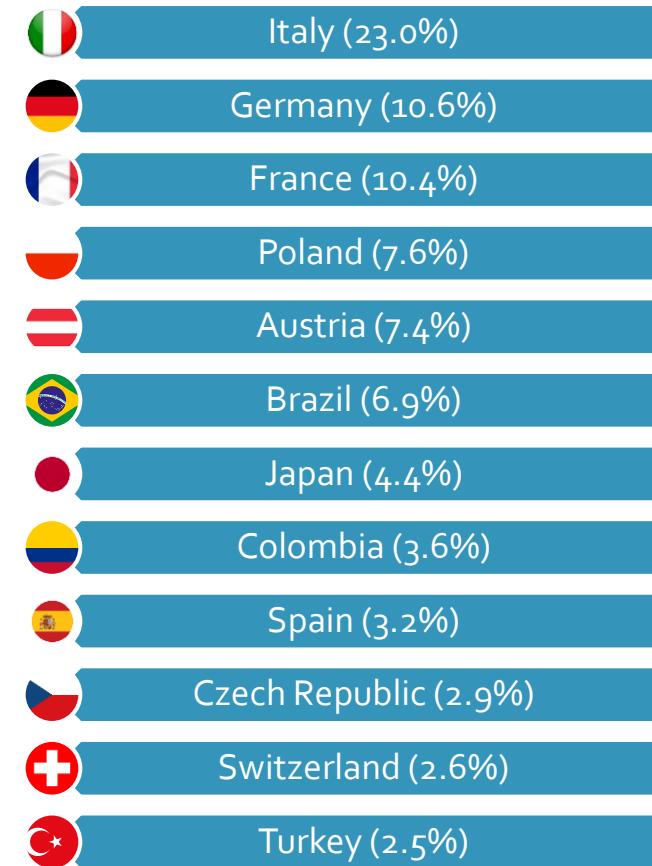
Total Foreign Students to Malta 2015-2025



Top Source Markets



Market Shares



Top EL Source Markets 2019-2025

	2019	2023	2024	2025	Abs. Change 2025/2024	% Change 2025/2024	Market Share 2025
Italy	18,335	21,808	20,182	17,526	-2,656	-13.2%	23.0%
Germany	9,764	8,174	8,158	8,075	-83	-1.0%	10.6%
France	8,878	7,081	8,335	7,886	-449	-5.4%	10.4%
Poland	4,556	4,859	5,757	5,750	-7	-0.1%	7.6%
Austria	3,954	4,908	5,356	5,603	247	4.6%	7.4%
Brazil	5,000	4,623	5,051	5,215	164	3.2%	6.9%
Japan	4,106	3,407	3,600	3,365	-235	-6.5%	4.4%
Colombia	1,746	3,036	2,636	2,703	67	2.5%	3.6%
Spain	3,760	3,807	4,475	2,442	-2,033	-45.4%	3.2%
Czech Republic	1,741	2,829	2,527	2,204	-323	-12.8%	2.9%
Switzerland	1,785	1,530	1,715	1,990	275	16.0%	2.6%
Turkey	1,689	1,849	1,841	1,872	31	1.7%	2.5%
Total	83,610	78,567	80,946	76,063	-4,883	-6.0%	100.0%

TEFL Students' Share Out of Inbound Tourists

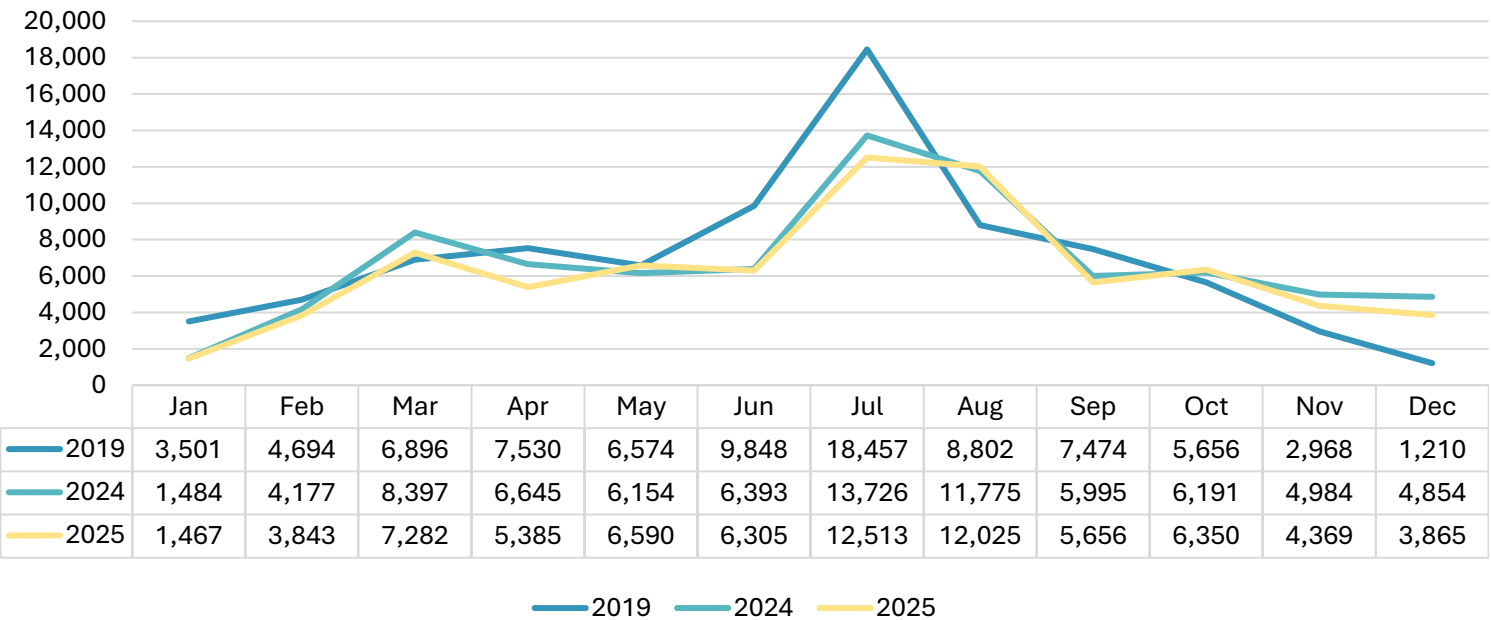
Students studying English as a foreign language in Malta accounted for **1.9% of total inbound tourists** visiting Malta in year 2025.

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.

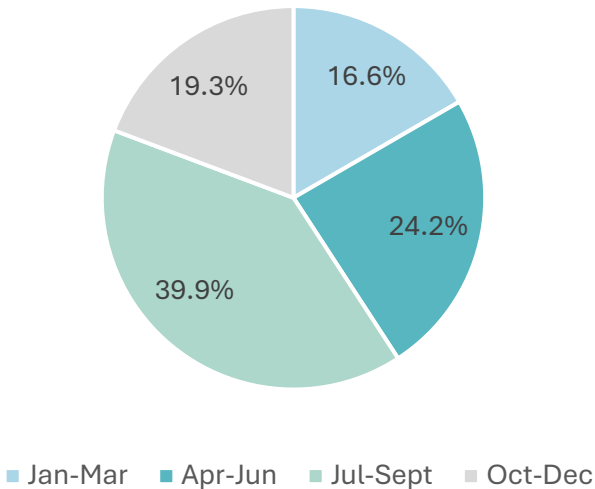
Main source markets	Students Year 2025	Inbound Tourists Year 2025	% of Students per incoming tourists
Italy	17,526	583,323	3.0%
Germany	8,075	261,939	3.1%
France	7,886	284,834	2.8%
Poland	5,750	386,654	1.5%
Austria	5,603	62,266	9.0%
Brazil	5,215	15,964	32.7%
Japan	3,365	16,952	19.8%
Colombia	2,703	7,641	36.2%
Spain	2,442	145,600	1.7%
Czech Republic	2,204	42,725	5.2%
Switzerland	1,990	72,560	2.7%
Turkey	1,872	18,130	10.3%
Hungary	1,256	79,770	1.6%
Slovakia	1,126	37,964	3.0%
South Korea	836	4,639	18.0%
Total	76,063	4,022,310	1.9%

Seasonality of Foreign Students

TEFL Students Visiting Malta by Month



Seasonality of TEFL Segment
Year 2025



July continued to be the busiest month for local licensed ELT schools, closely followed by August, together accounting for 32.4% of the total (excluding students who followed a course online).

Student Weeks by Age and by Gender

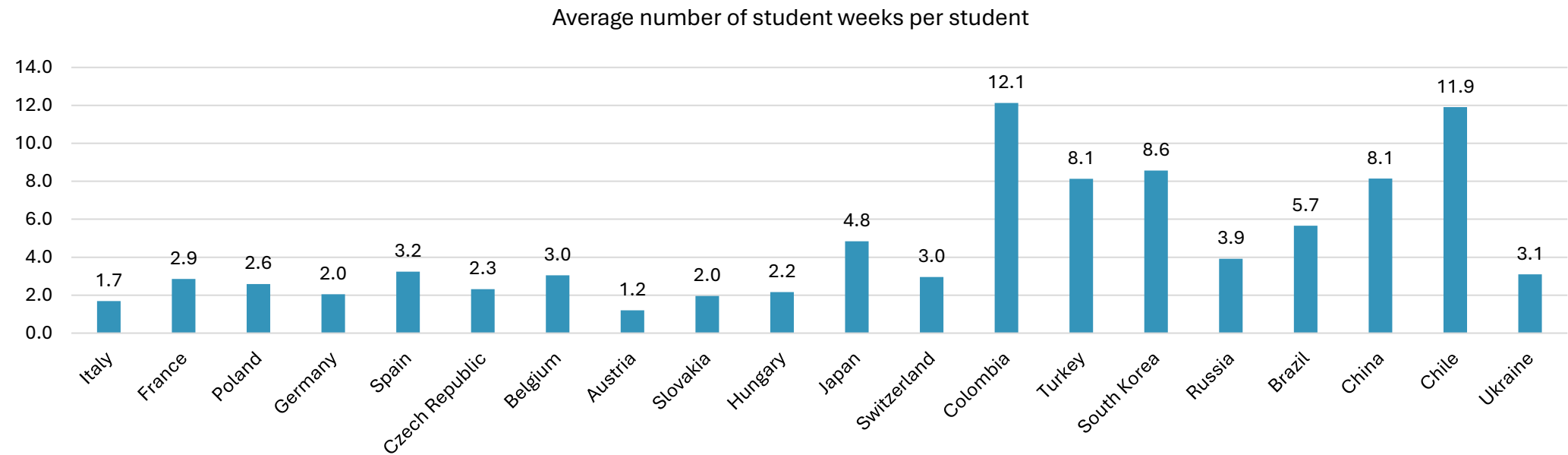
- In 2025, the total number of student weeks amounted to **262,255 weeks**, with an overall average of **3.4 weeks**.
- The **18–25** cohort generated the highest number of student weeks at 76,314, followed by **26–35** at 55,881, indicating that the core demand is concentrated in younger adult learners.
- Students aged **26 to 35 years** had the highest average length of stay at 7.0 weeks.
- The **15 and under** and **50 and over** groups had the shortest length of stays at 1.9 weeks and 2.3 weeks respectively.

Age Category	15 and under	16-17	18-25	26-35	36-49	50 and over	Total
Student weeks*	42,835	36,460	76,314	55,881	32,381	18,383	262,255
Students*	22,232	15,928	13,574	7,976	8,517	7,836	76,063
Average number of student weeks by age group	1.9	2.3	5.6	7.0	3.8	2.3	3.4

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

Average Number of Student Weeks by Market

With an average of 12.1 weeks, students from Colombia recorded the highest number of student weeks per student, followed by Chilean students at 11.9 weeks and South Korean students at 8.6 weeks.



Type of Course Followed

As in previous years, **General English: Standard** remained the most popular course, attracting 55,432 students and accounting for 72.9% of total students.

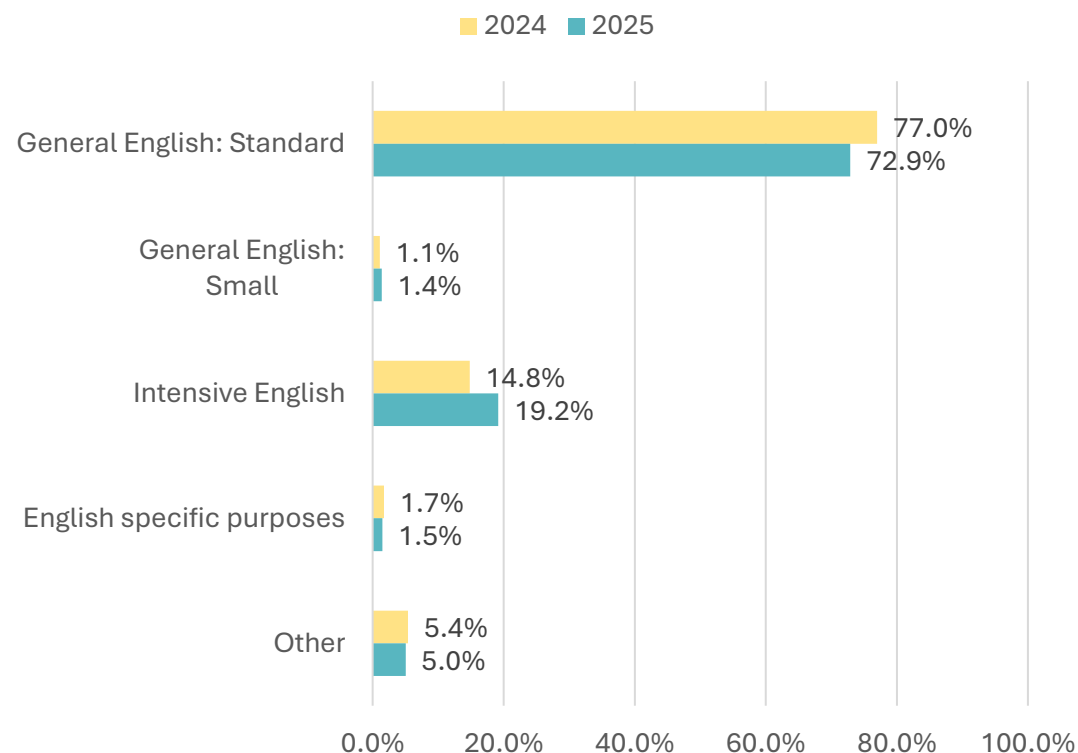
Despite this, the course registered a decline in market share compared to 2024, in favour of the **Intensive English Course**, whose share rose from 14.8% to 19.2%.

Other courses accounted for 5.0% of total enrolments and include exam preparation courses, one-to-one tuition, combined programmes, and other specialised courses.

Note:

‘English specific’ includes business English

Share of English students by type of course followed

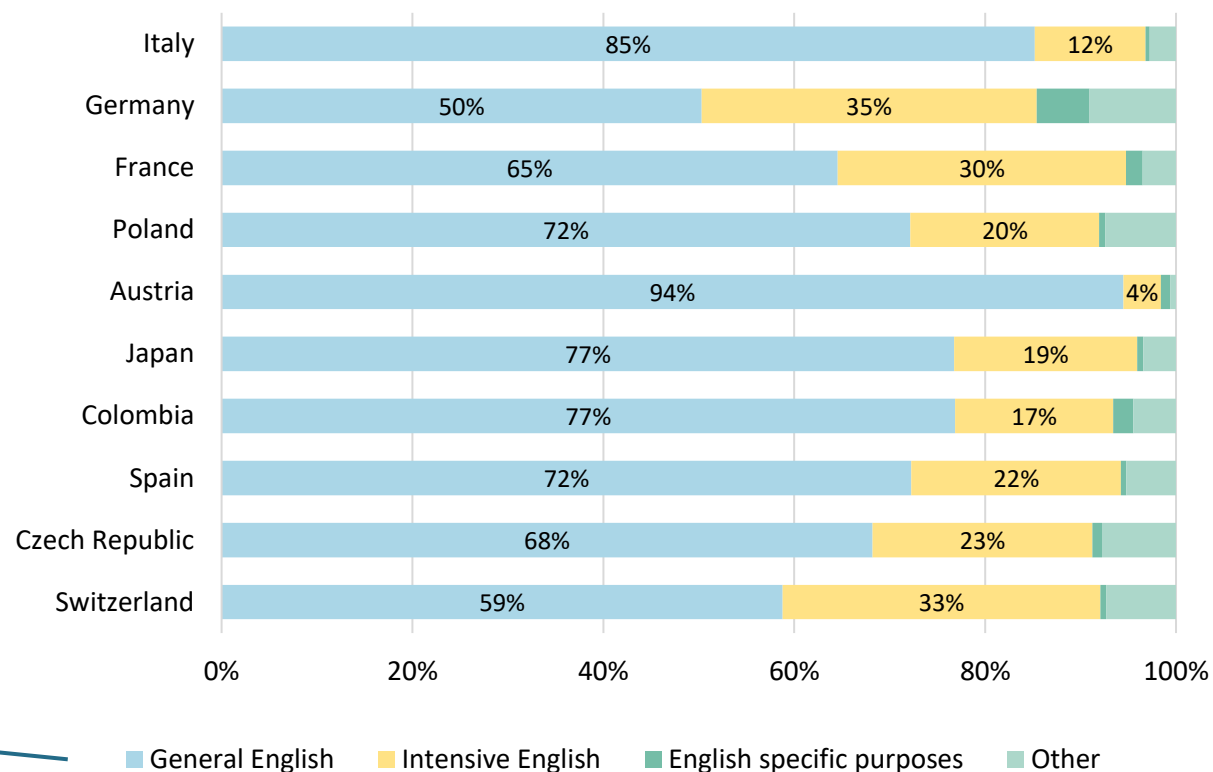


Type of Course Followed of Main Markets

General English was the most popular course across all markets, with particularly high participation among Austrian (94%) and Italian (85%) students.

This was followed by the **Intensive English** course, which featured most popular among German (35%), Swiss (33%), and French (30%) students.

Share of students by market and by type of course followed
Year 2025

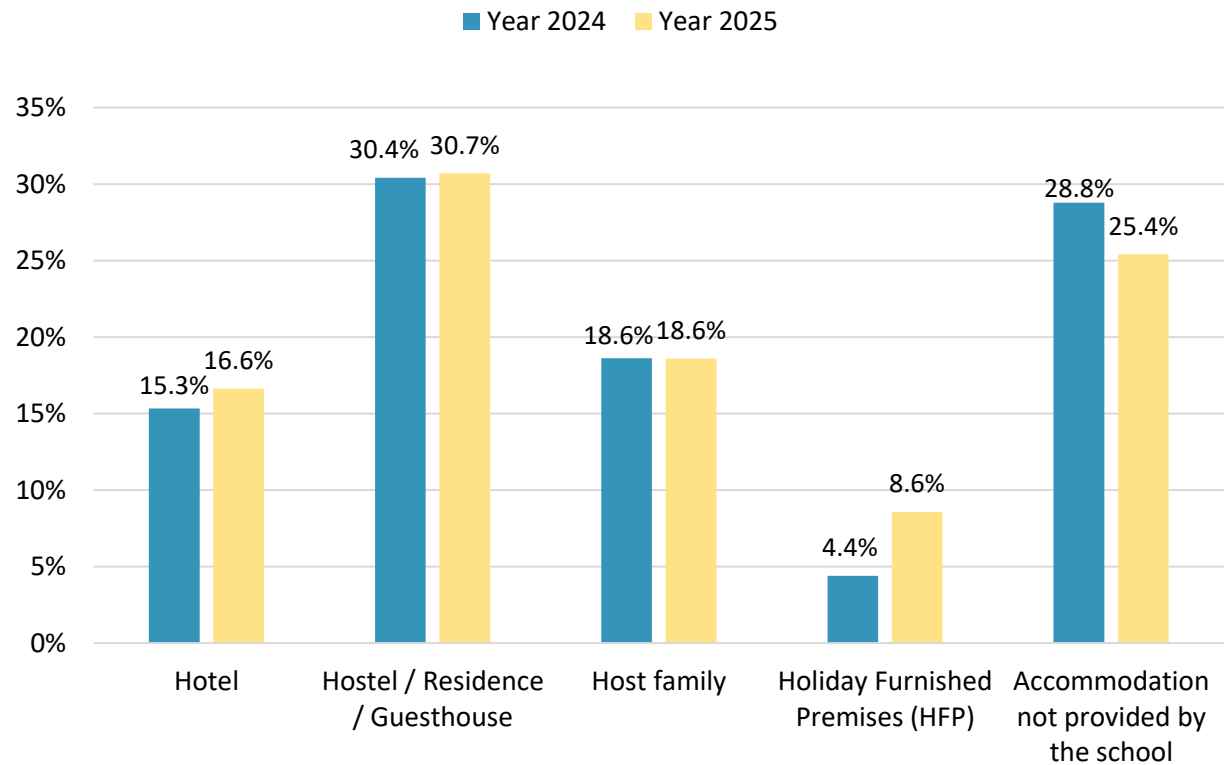


Type of Accommodation Used

- As in the previous year, the preferred type of accommodation of TEFL students was a **hostel/residence/guesthouse** with a share of 30.7%.
- One fourth of students chose to stay in an **accommodation not provided by the school**.
- Meanwhile, 18.6% stayed with a **host family** and 16.6% stayed in a **hotel** type of accommodation.



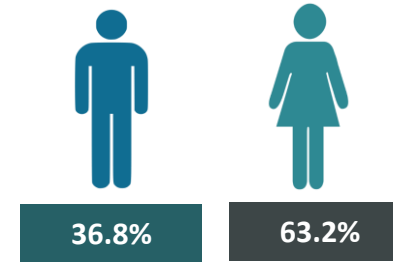
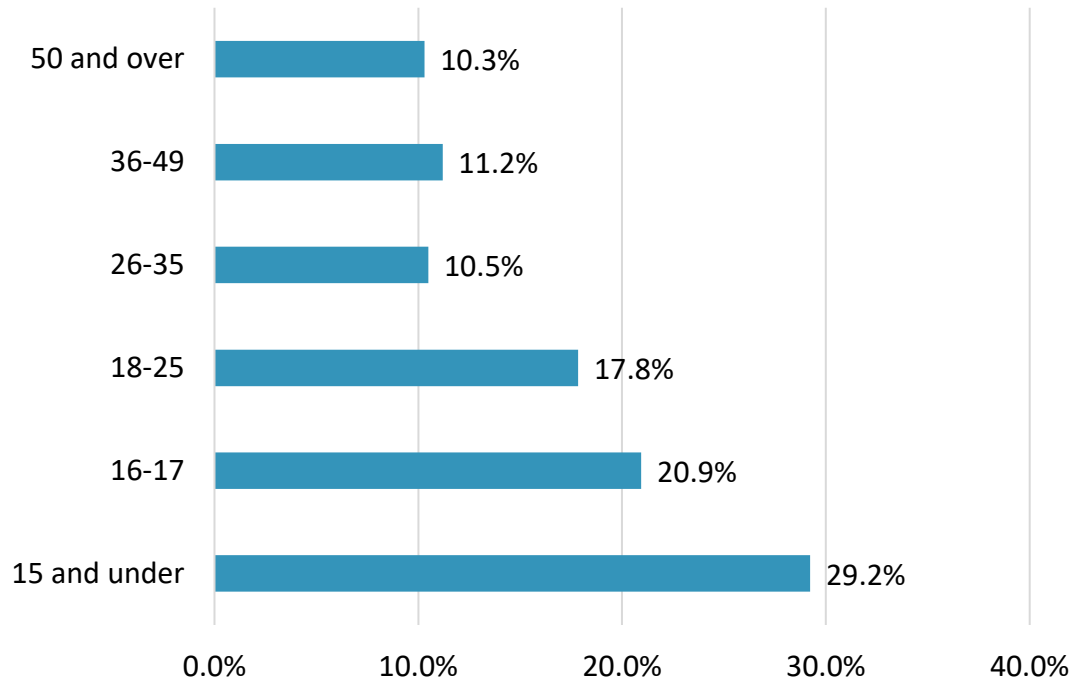
Share of Foreign Students by Type of Accommodation Used



TEFL Year 2025

Student Population by Gender and Age Group

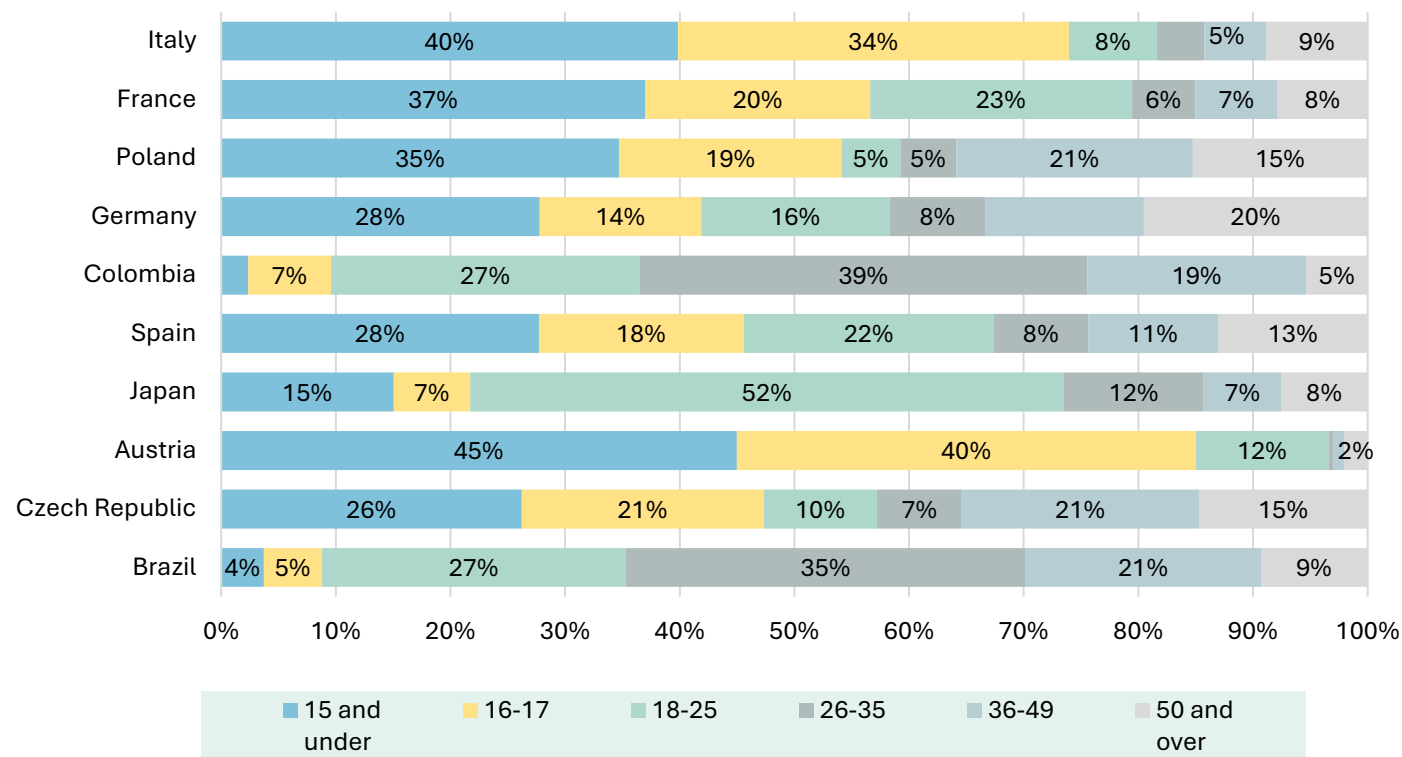
Share of student population by age group



- Female students outnumber males and accounted for 63.2% of the entire student population. Female dominance is prevalent across all age categories.
- The largest share of students were **15 years or under** at 29.2%, followed by the **16-17** age bracket at 20.9%.

Age Group of Main Source Markets

Student Population by Age Group – Year 2024



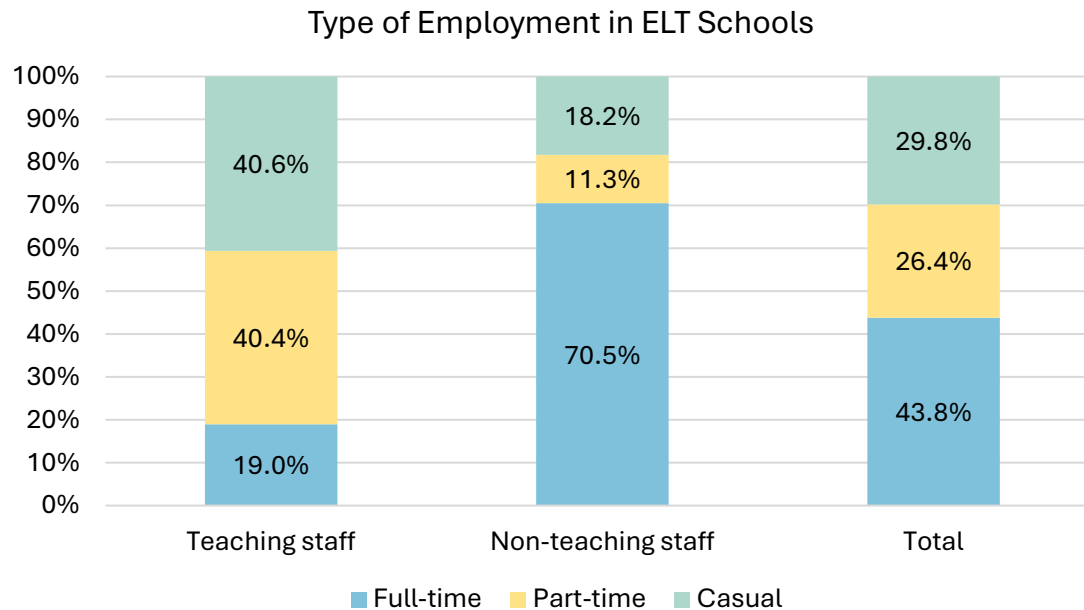
Among the leading TEFL source markets, Italians, Germans, French, Polish, and Austrians had the highest share of students aged 15 years or younger.

Close to 2 in 5 Austrians fell into the 16 to 17 age group, with Colombians next at 39%.

For Japan, students aged 18 to 25 accounted for the largest segment, representing 52% of Japanese TEFL students.

Type of Employment in ELT Schools

- In 2025, staff employed in local licensed ELT schools numbered 1,376, of which 51.7% were teaching/academic staff and 48.3% were non-teaching staff. Women were the majority in both groups
- Only 19.0% of teaching staff were full-timers, compared to 70.5% of non-teaching staff. Teaching roles were mainly part-time or casual, while non-teaching roles were mainly full-time.



Share of Teaching and Non-teaching staff at ELT Schools

