

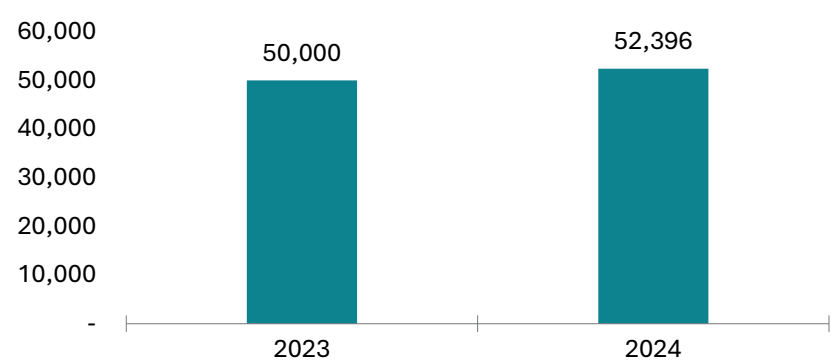
English Language Travel Industry Report 2024

Key Highlights

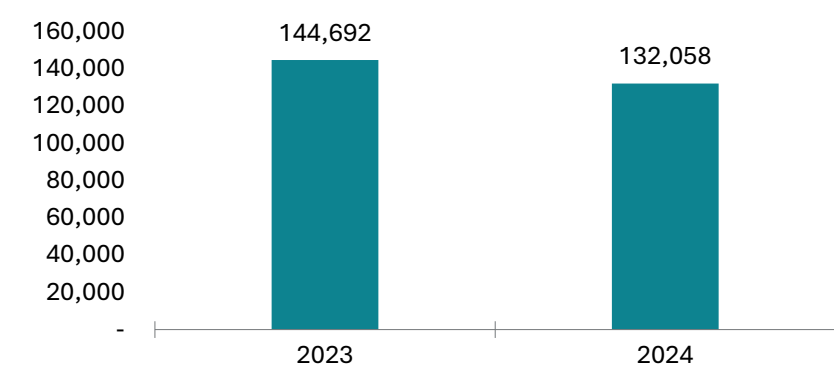
Participating FELTOM schools reported annual student arrivals of 52.4k, which is 4.8% higher than the 50.0k registered in 2023.

On the other hand, student weeks decreased by 8.7% in 2024 when compared to 2023. The average length of stay over this period decreased from 20.3 days in 2023 to 17.6 days in 2024.

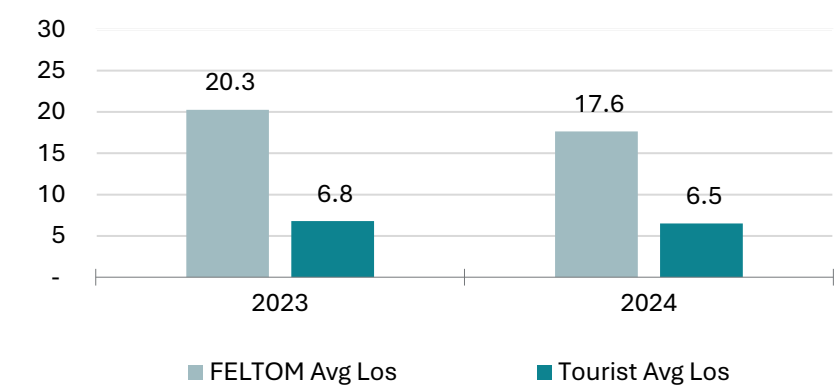
FELTOM Student arrivals



FELTOM Student weeks



Average length of stay (days)



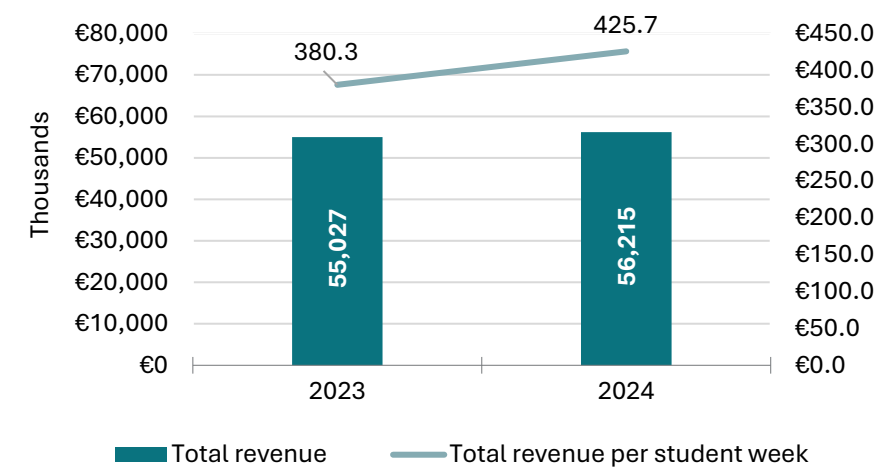
Source: FELTOM Schools

The annual FELTOM survey carried out by Deloitte shows that participating FELTOM-affiliated schools reported increases in total revenue in 2024 of 2.2% when compared to 2023. This revenue growth was mainly driven by increased fees across the board.

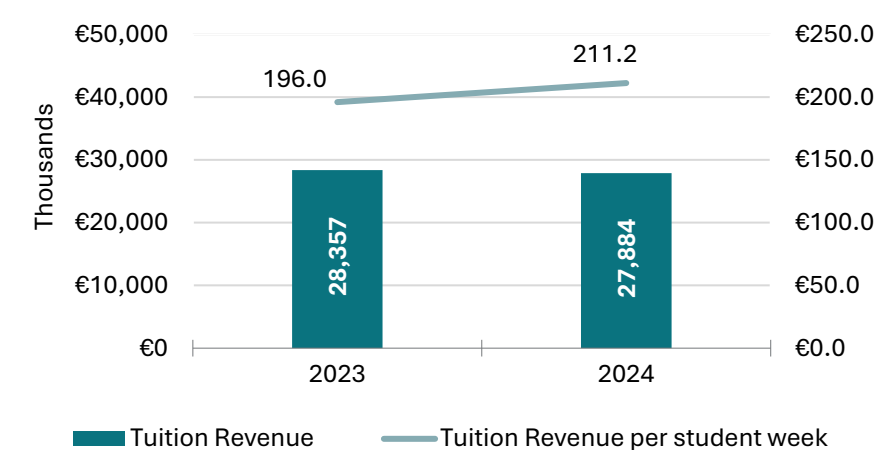
Tuition revenue per student week increased by 7.8% relative to 2023. Weekly Accommodation revenue also saw an increase of 13.2% compared to 2023 levels.

Other ancillary revenue generated through activities decreased by 29.9%, from €35.4 per student week in 2023 to €46.0 in 2024.

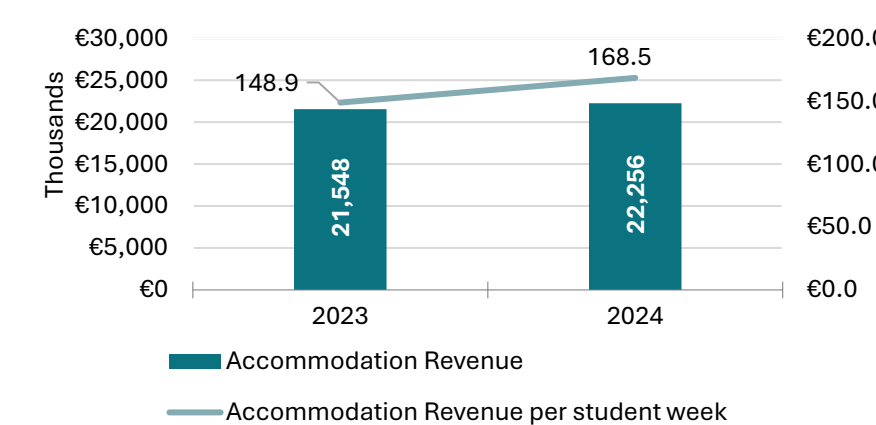
Total revenue (€000s)



Total tuition revenue (€000)



Total accommodation revenue (€000)



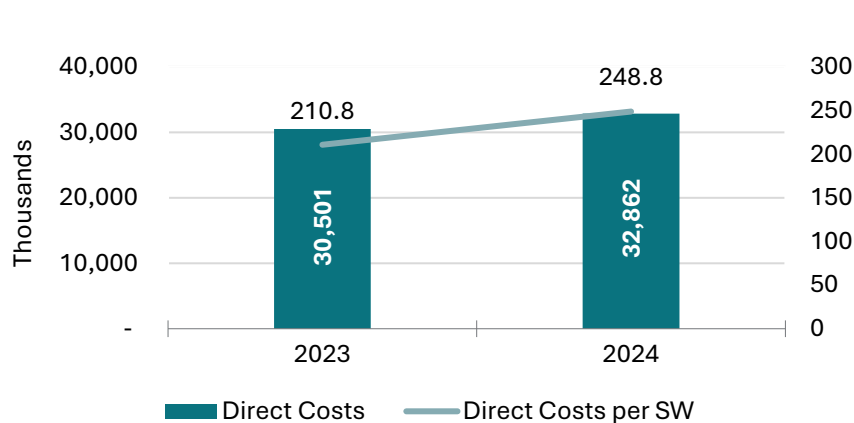
Source: FELTOM Schools

Total direct costs increased by 7.7% over 2023. Total direct costs per week increased by 18.0% compared to 2023.

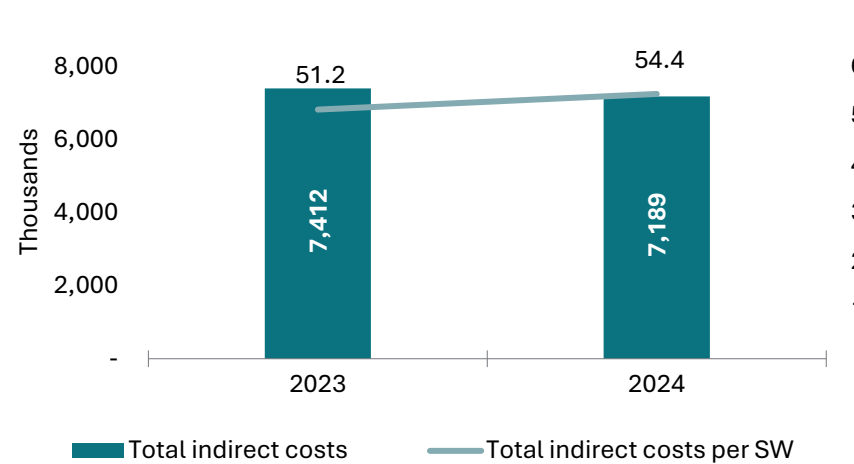
Total indirect costs decreased by 3.0% compared to 2023. On a weekly basis, however, a 6.3% increase was registered.

Reported profits before tax stood 4.6% below 2023 levels. On a per week basis, a 4.4% was registered.

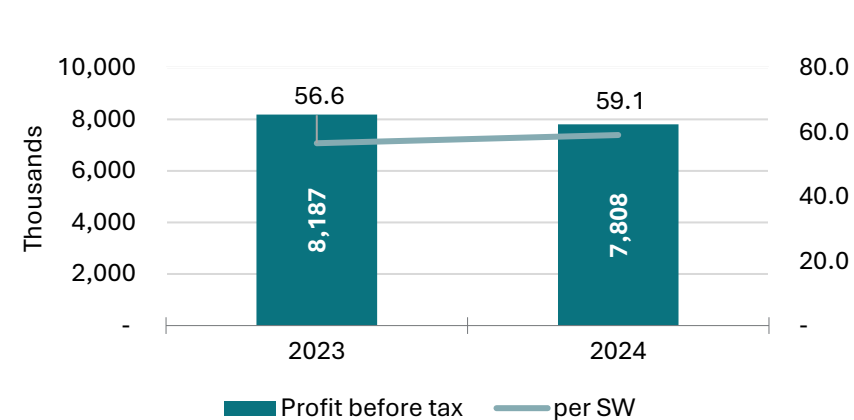
Total direct costs (€000s)



Total indirect costs (€000s)



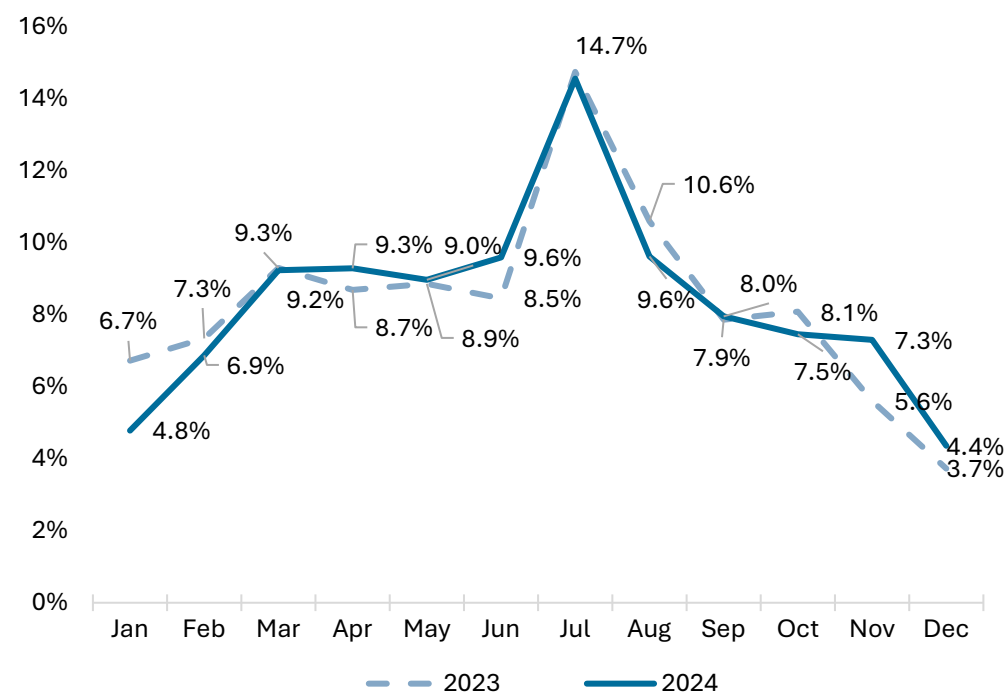
Profit before tax (€000s)



Source: FELTOM Schools

The shoulder season in the latter half of the year has widened, with 19.2% of total student weeks registered in the Oct-Dec period, compared to 17.4% registered in the corresponding period in 2023. This illustrates how the ELT sector has continued its trend of helping to drive tourist volumes during the shoulder months.

Monthly student weeks as % of total student weeks



Source: FELTOM Schools

Industry Highlights (NSO)

Statistics for 2024 issued by NSO reported annual student arrivals of 80.9k, which is 3.0% higher than the 78.6k registered in 2023.

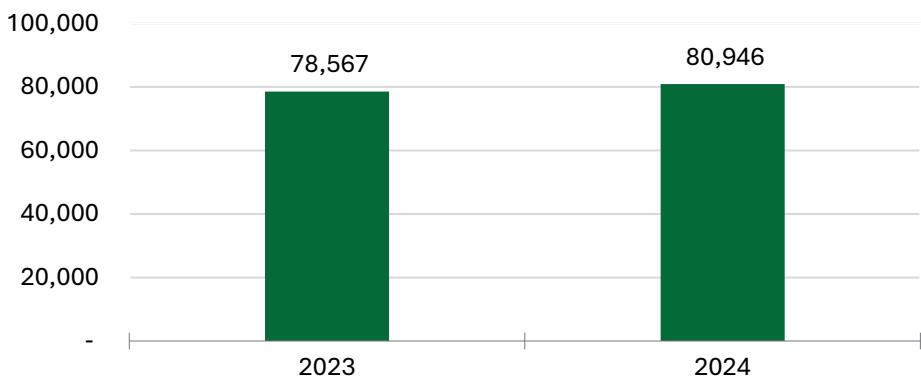
On the other hand, student weeks decreased by 6.0% in 2024 when compared to 2023. The average length of stay over this period decreased from 24.3 days in 2023 to 22.2 days in 2024.

The English Language Travel (ELT) sector in 2024 accounted for approximately 7.8% of total tourist guest nights and around 5.4% of total tourist expenditure. NSO place indicative total expenditure by ELT students in 2024 at approximately €178 million.

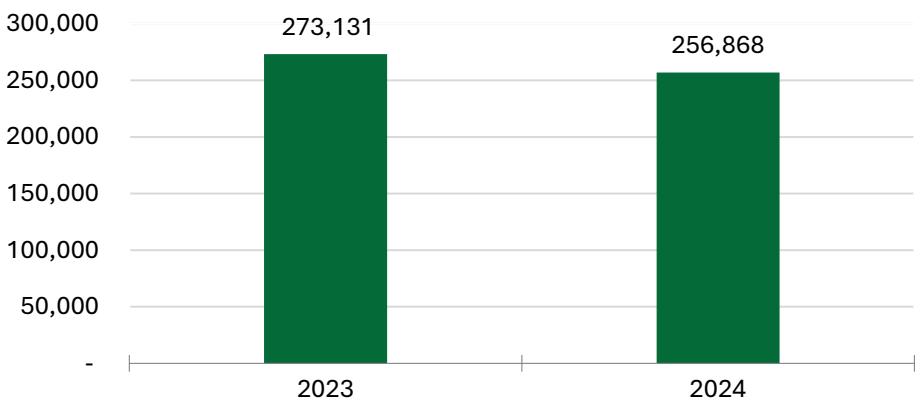
The ELT sector remains an important niche market for the tourism industry in Malta. The sector plays an important role in the diversification strategy of the local tourism sector to promote a more diverse profile of visiting tourists and less reliance on traditional core inbound markets.

During 2024, 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 44% of total student weeks due to the longer training programmes followed by this cohort.

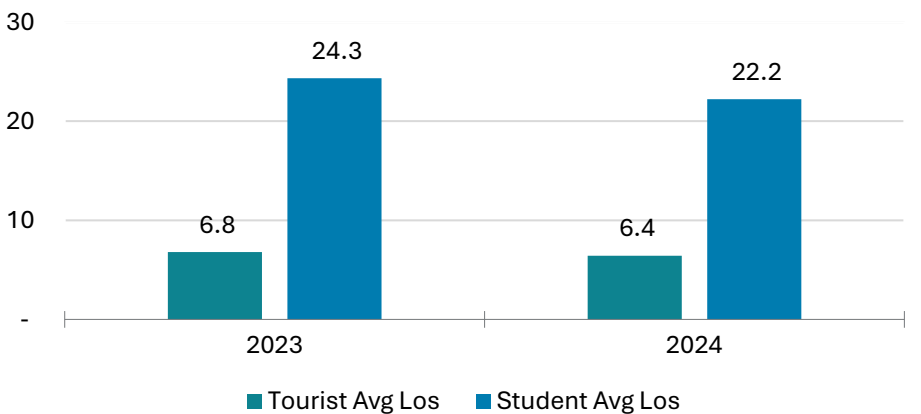
Student arrivals*



Student weeks*



Average length of stay (days)*



*Source: NSO

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