

# English Language Travel Market 2018



**March 2019**

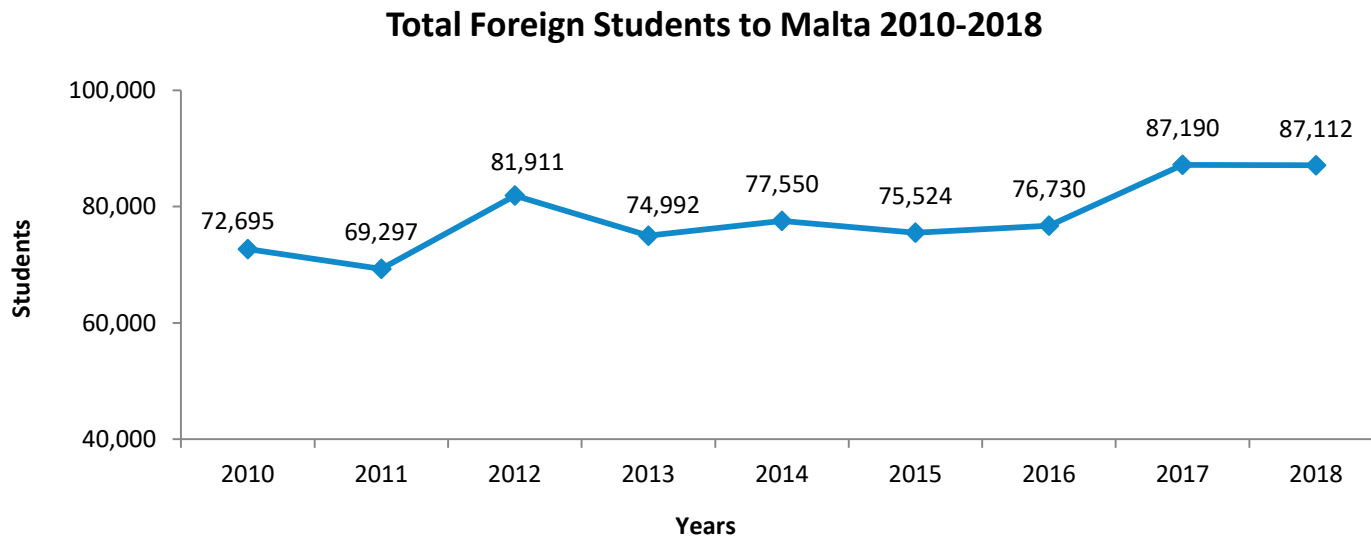
Based on NSO TEFL News Release dated 14<sup>th</sup> March 2019



**Malta**  
Gozo & Comino

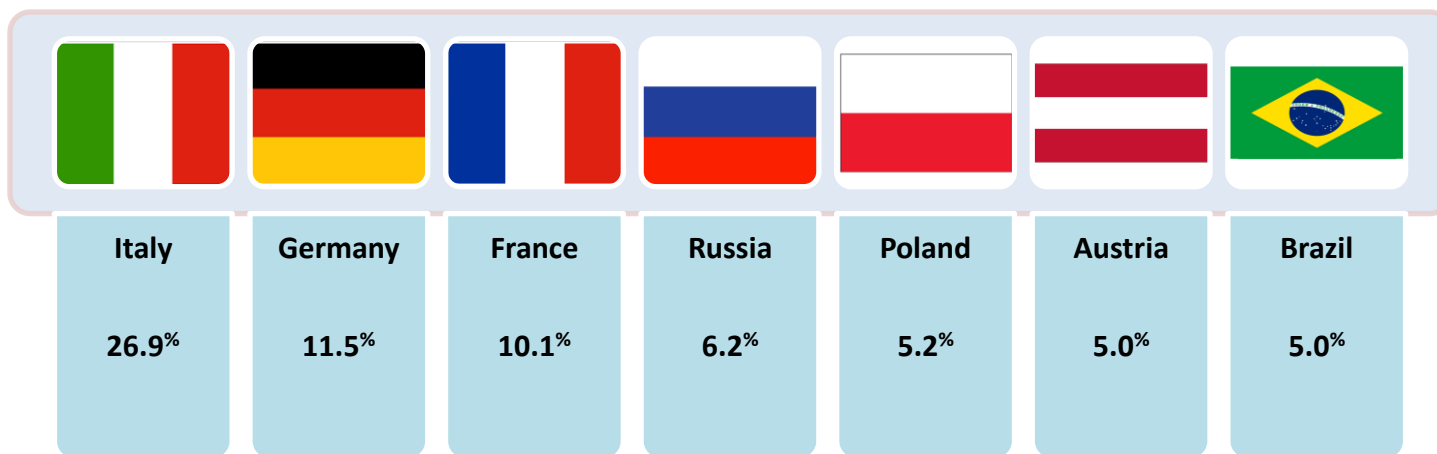
# Total Foreign Students to Malta 2010-2018

- In year 2018, a **total of 87,112** students followed courses at local English language specialised schools in Malta, representing a decrease of 0.1% over 2017.
- From 2010 to 2018 this segment grew at an average annual rate of 2.3%.



## Top Source Markets

- The majority of students attending English language courses in Malta came from **Italy, Germany, and France**. Together, these accounted for 48.6% of total student visits.
- Russia ranked as the 4<sup>th</sup> largest market with a share of 6.2%, followed by Poland, Austria and Brazil.



## Time series of Main Source Markets

- During year 2018, the largest absolute increase was recorded from Austria, increasing by 1,256 students.
- Over the years, substantial increases were recorded from Brazil and Poland. Poland in fact now ranks as the 5<sup>th</sup> largest EFL market with a share of 5.2%, whilst Brazil ranks as the 7<sup>th</sup> largest market with a share of 5.0% .

	2012	2015	2016	2017	2018	Absolute change 2018/2017	% Change 2018/2017	Market Share 2018
Italy	15,712	17,956	18,798	25,594	23,482	-2,112	-8.3%	27.0%
Germany	11,573	10,364	10,917	10,277	9,991	-286	-2.8%	11.5%
France	8,485	7,657	8,517	9,138	8,844	-294	-3.2%	10.2%
Russia	11,379	5,720	4,156	4,818	5,396	578	12.0%	6.2%
Poland	1,800	2,749	3,131	4,512	4,501	-11	-0.2%	5.2%
Austria	4,633	3,751	3,534	3,107	4,363	1,256	40.4%	5.0%
Brazil	860	2,347	2,621	4,519	4,360	-159	-3.5%	5.0%
Spain	5,962	3,269	3,977	3,611	3,971	360	10.0%	4.6%
Japan	884	1,593	2,394	2,924	3,508	584	20.0%	4.0%
Switzerland	2,116	2,420	1,965	2,382	2,007	-375	-15.7%	2.3%
Turkey	2,783	2,290	2,752	2,329	1,737	-592	-25.4%	2.0%
Czech Republic	1,661	3,151	1,397	1,475	1,558	83	5.6%	1.8%
Other	8,308	12,257	12,571	12,504	13,394	890	7.1%	15.4%
<b>Total EL</b>	<b>76,156</b>	<b>75,524</b>	<b>76,730</b>	<b>87,190</b>	<b>87,112</b>	<b>-78</b>	<b>-0.1%</b>	<b>100.0%</b>



# EFL Students' Share Out of Inbound Tourists

- Students studying English as a foreign language in Malta accounted for **3.4% of total inbound tourists** visiting Malta in year 2018.
- It can be noted that around two out of five of Brazilian tourists visited Malta for English language learning.
- Other markets with a high share of students per incoming tourists are Russia (with a share of 18.6%), Japan (with a share of 15.3%) and Turkey (with a share of 14.1%).

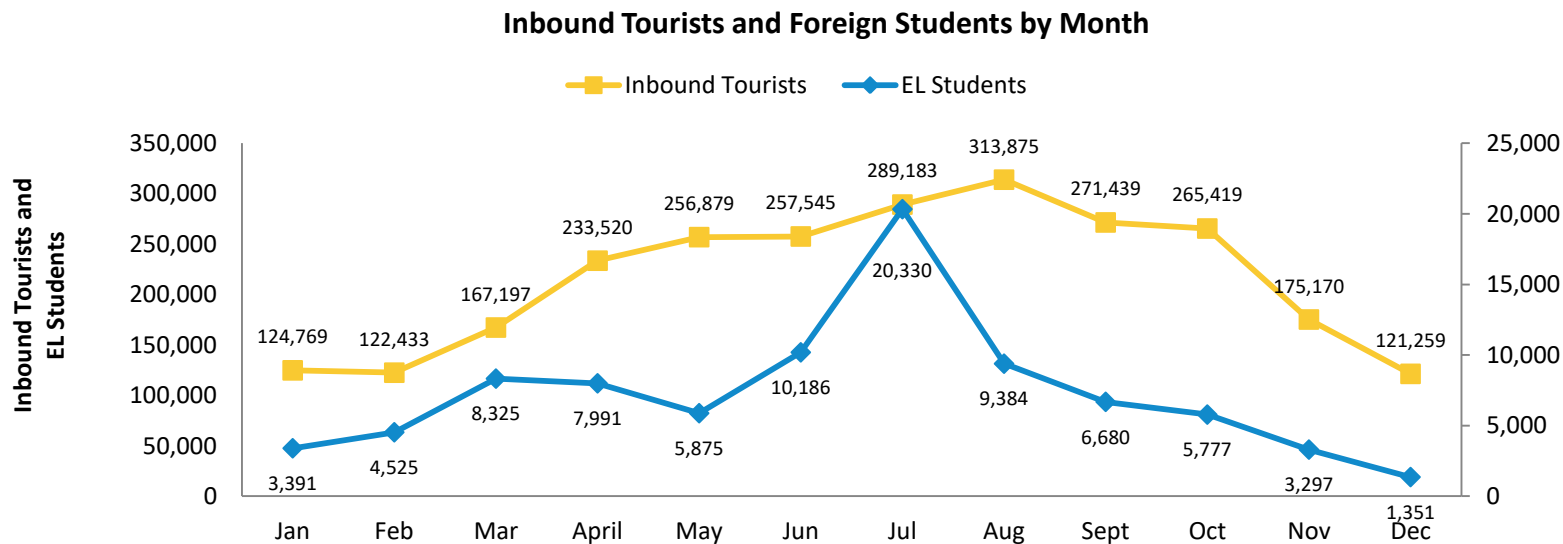
Main source markets	Students	Inbound Tourists	% of Students per incoming tourists
Italy	23,482	390,607	6.0%
Germany	9,991	226,962	4.4%
France	8,844	213,299	4.1%
Russia	5,396	28,944	18.6%
Poland	4,501	96,362	4.7%
Austria	4,363	39,029	11.2%
Brazil	4,360	10,749	40.6%
Spain	3,971	99,046	4.0%
Japan	3,508	22,863	15.3%
Switzerland	2,007	45,572	4.4%
Turkey	1,737	12,359	14.1%
Czech Republic	1,558	22,872	6.8%
<b>Total</b>	<b>87,112</b>	<b>2,598,690</b>	<b>3.4%</b>

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



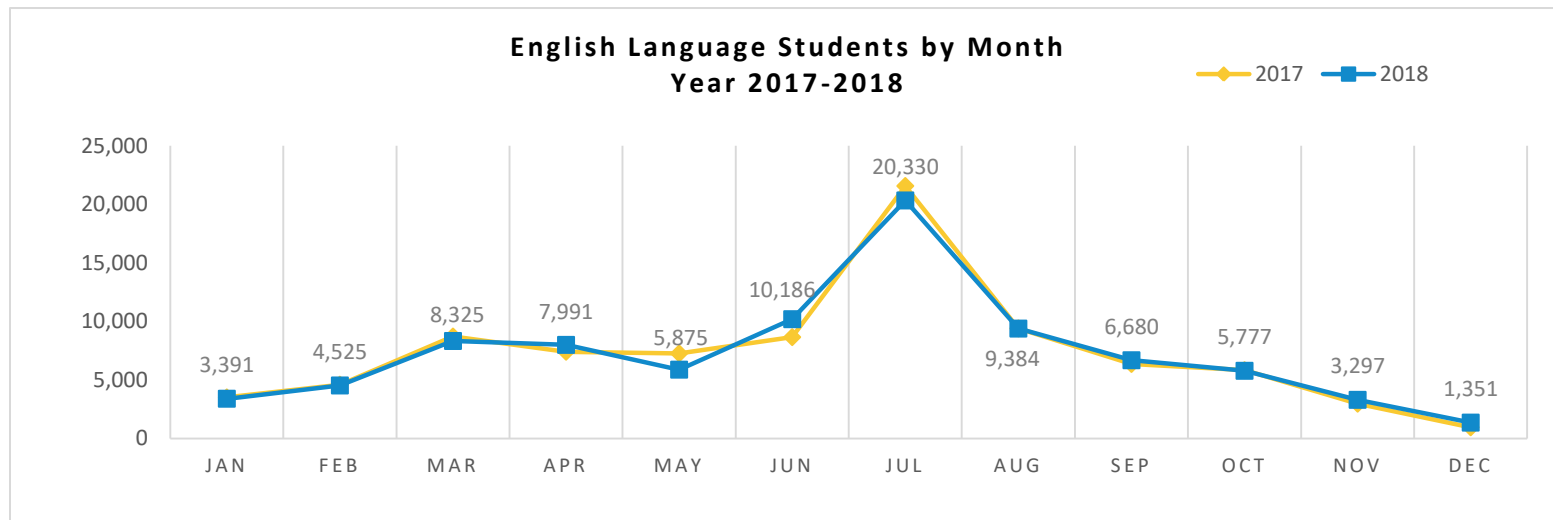
# Foreign Students and Inbound Tourists by Month

□ July had the highest share of students per incoming tourists, at 7.0%.



# English Language Students by Month 2018

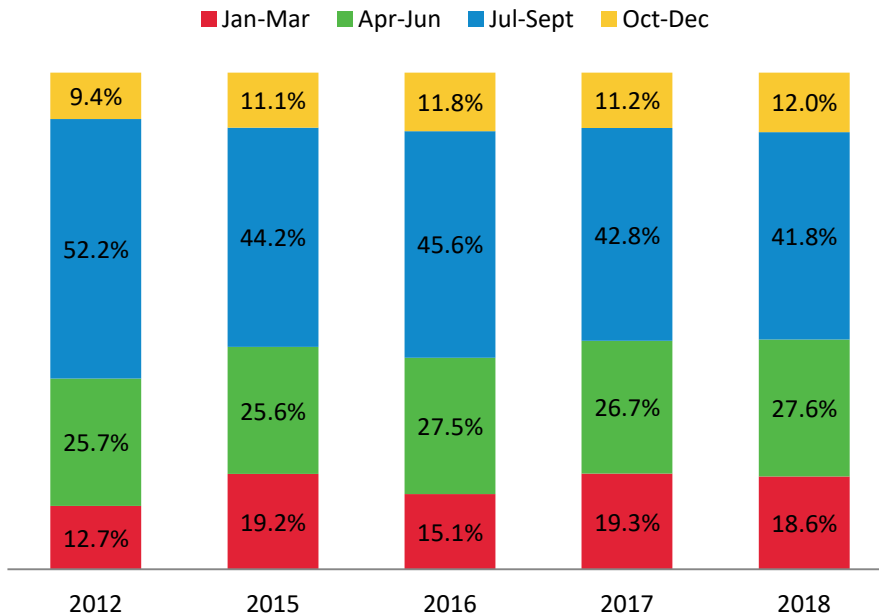
- July was the busiest month for English Language specialised schools with 20,330 arrivals, accounting for 23.3% out of the annual total. This was followed by June and August with a share of 11.7% and 10.8% of total arrivals respectively.
- December was the least busy month, receiving 1,351 students.
- A similar pattern was also recorded in 2017.



# Seasonality

- The summer months of July to September remain the peak months for learning English in Malta.
- The months of April to June attracted 27.6% of incoming students.
- Although the peak summer months attract a substantial share of students, the market share during the third quarter of the year is on the decline. On the contrary, the share of off-peak traffic is increasing – in year 2018, 18.6% of foreign students came to Malta during the winter months of January to March compared to 12.7% in year 2012.

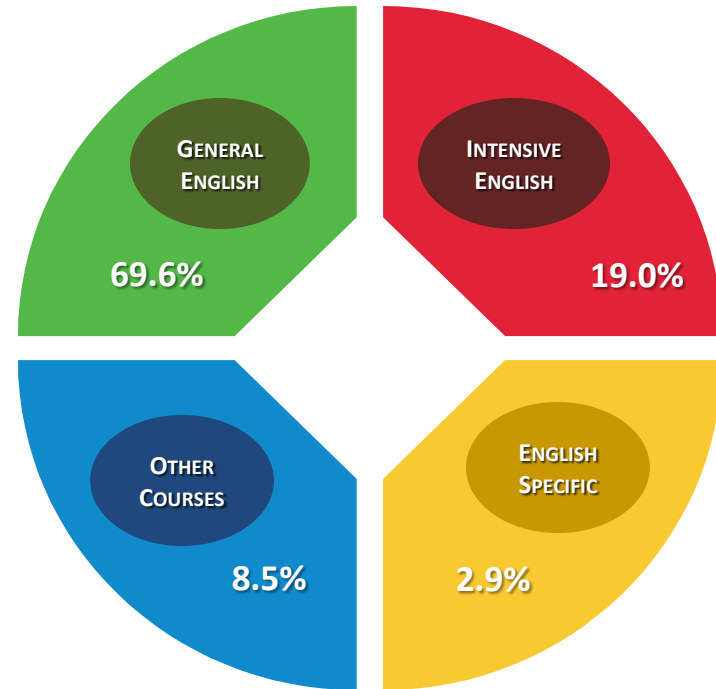
Seasonality of Foreign Students 2012-2018



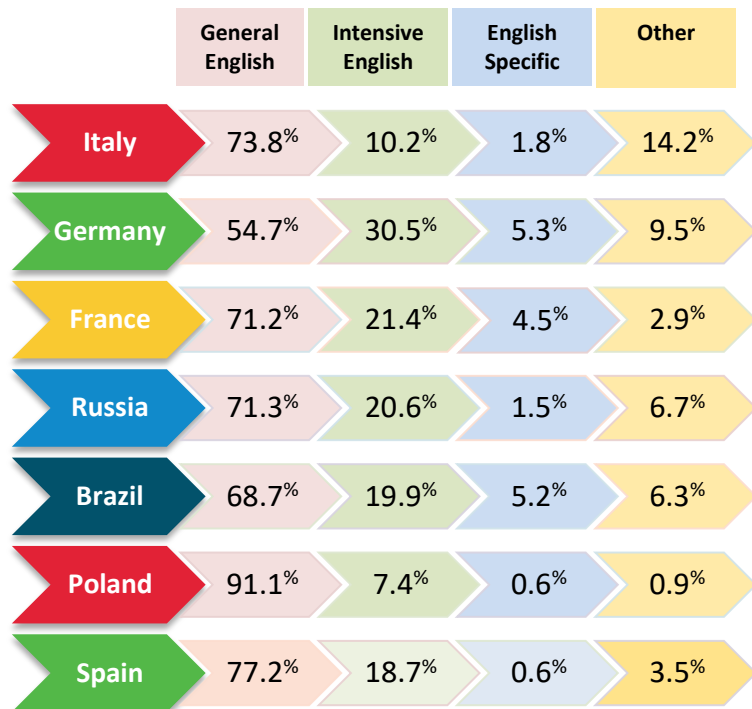


## Type of Course Followed

- The most popular course offered by specialised English Language schools is **General English**. Seven out of ten students attended this course during year 2018.
- This was followed by the **Intensive English** course, with a share of 19.0%.
- **English specific courses**, including Business English, had a share of 2.9% of total students.
- **Exam preparation courses, one-to-one lessons and other courses** accounted for 8.5% out of total.



## Type of Course Followed by Nationality



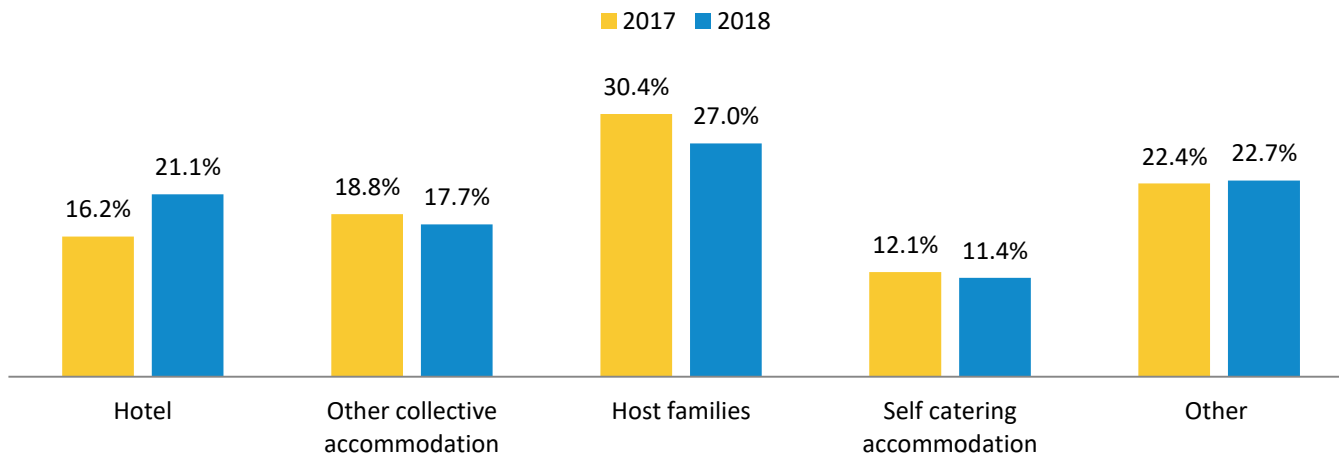
- **General English** is the most popular course followed amongst all of the studied nationalities. Out of the top seven EFL markets, the share of General English stood highest amongst Polish, Spanish and Italian markets.
- 30.5% of German, 21.4% of French and 20.6% of Russian students followed the **Intensive English** course. Furthermore, this course is sought by smaller EFL markets including Swiss, Colombian and Slovakian students.
- The **English Specific** course, which includes Business English, had the highest share amongst German and Brazilian students.
- 14.2% of Italian EFL students attended **exam preparation courses, one-to-one lessons and other courses**.



# Type of Accommodation Used

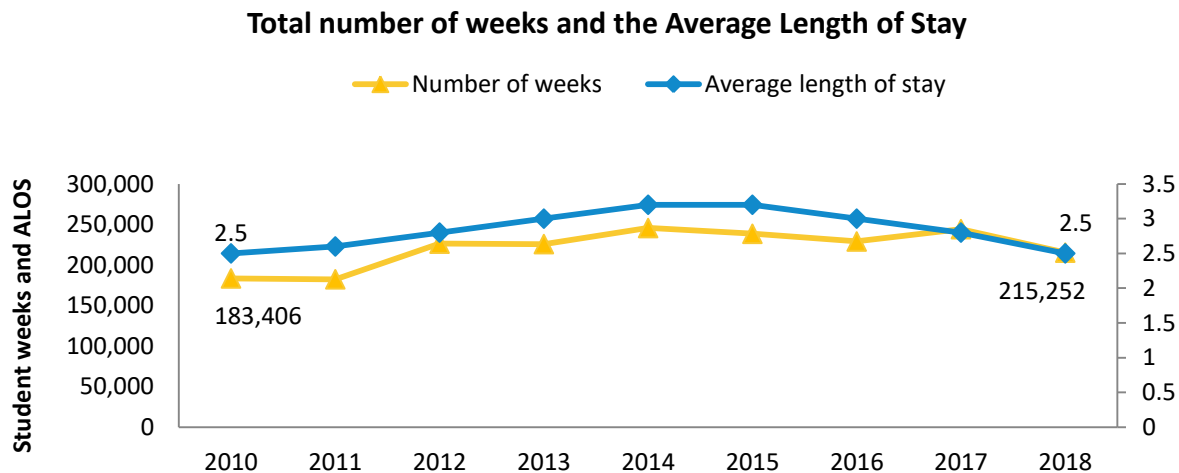
- As in the previous year, the larger share of students (27.0%) resided with **host families**.
- The **other collective accommodation category**, including residences, hostels and guest houses, was utilised by 17.7% of students.
- 21.1% of students chose to stay in **hotels**, mainly within 3-star hotels (12.2%) and 4-star hotels (8.8%).
- **Other accommodation**, including accommodation not provided by the school, had a share of 22.7%.

Share of Foreign Students by Type of Accommodation



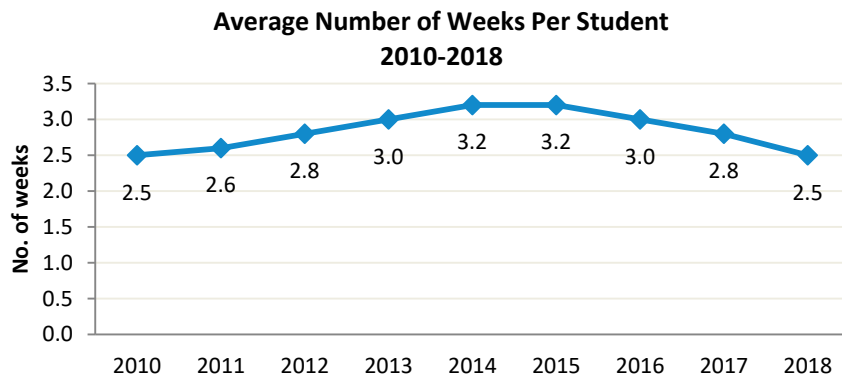
# Number of Students Weeks

- With an average length of stay of 2.5 weeks, foreign students enrolled in local licensed ELT schools spent a total of 215,252 weeks in Malta, recording a decrease of 11.9% when compared to year 2017.
- The number of student weeks registered an average annual growth rate of 2.0% during the last 8 years (2010-2018).



# Average Number of Weeks by Market

- English language students stayed in Malta for an average of 2.5 weeks, down by 0.3 weeks when compared to year 2017. The decline in the average length of stay is a common trend across the different source markets.
- Longer stays were prevalent among students from Colombia (11.0 weeks) and South Korea (7.9 weeks).
- On the contrary, students from Austria (0.9 weeks), Italy (1.4 weeks), Poland (1.4 weeks), Germany (1.7 weeks) and the Netherlands (1.7 weeks), had shorter stays.

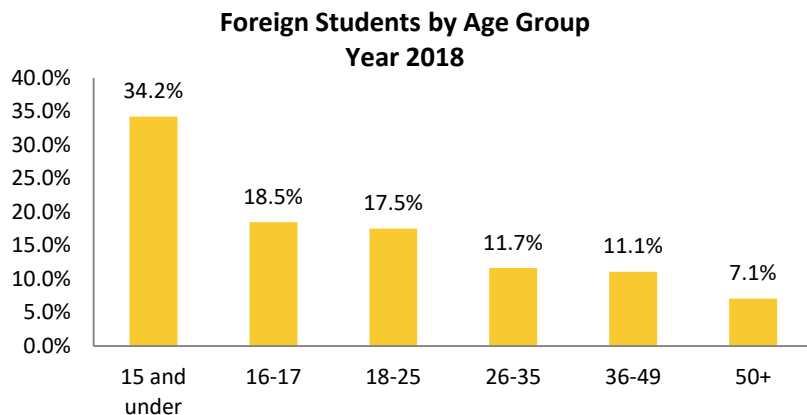


Citizenship Year 2018	Total number of weeks	Average number of weeks per student
Italy	33,166	1.4
Germany	16,974	1.7
France	18,461	2.1
Russia	12,970	2.4
Poland	6,492	1.4
Austria	4,111	0.9
Brazil	19,137	4.4
Spain	10,465	2.6
Japan	15,188	4.3
Switzerland	5,667	2.8
Turkey	11,199	6.4
Czech Republic	3,076	2.0
Colombia	14,229	11.0
Ukraine	2,805	2.6
South Korea	7,884	7.9
Netherlands	1,577	1.7
Slovakia	1,864	2.2
Sweden	2,135	2.5
Hungary	1,603	2.4
Other countries	26,251	3.9
<b>Total</b>	<b>215,252</b>	<b>2.5</b>



# Age of Students

- The largest share of language students were aged **15 years and under**, with a share of 34.2% out of total students. Students aged 50 years and over were in the minority.
- Students aged **26 to 35** have the **longest length of stay at 4.2 weeks**, closely followed by the 18 to 25 age category at 4.0 weeks.



Average number of weeks by age group - Year 2018			
Age group	Total	Total	Average
	students	weeks	no. of weeks
15 and under	28,060	44,928	1.6
16-17	17,096	26,171	1.5
18-25	16,858	67,149	4.0
26-35	10,127	42,309	4.2
36-49	9,253	23,113	2.5
50+	5,741	11,551	2.0
Age unknown	55	30	0.5
Total	87,190	215,251	2.5



## Gender of Students 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.

	Male	Female	Total	Market Share 2018
15 and under	12,134	17,678	29,812	34.2%
16-17	6,507	9,568	16,075	18.5%
18-25	6,164	9,086	15,250	17.5%
26-35	3,656	6,497	10,153	11.7%
36-49	3,225	6,427	9,652	11.1%
50+	2,056	4,103	6,159	7.1%
<b>Total</b>	<b>33,748</b>	<b>53,364</b>	<b>87,112</b>	<b>100.0%</b>



38.7%



61.3%



# Staff in Specialised English Language Schools

- In 2018, total staff in English language specialised schools numbered 1,749, of which 58.8% were teaching staff and 41.2% were non-teaching staff.
- The largest share of **teaching staff** (33.1%) were between 18 and 24 years of age.
- **Female teachers** accounted for 71.9% of total teaching staff.
- The larger share of teaching staff (54.7%) were casual part-timers whilst the larger share of non-teaching staff (52.1%) were employed on a full-time basis.

Type of employment	Teaching staff			Non-teaching staff			Total		
	Males	Females	Total	Males	Females	Total	Males	Females	Total
Full-time	41	86	<b>127</b>	146	230	<b>376</b>	187	316	<b>503</b>
Part-time	96	243	<b>339</b>	24	31	<b>55</b>	120	274	<b>394</b>
Casual part-time	152	410	<b>562</b>	163	127	<b>290</b>	315	537	<b>852</b>
<b>Total</b>	<b>289</b>	<b>739</b>	<b>1,028</b>	<b>333</b>	<b>388</b>	<b>721</b>	<b>622</b>	<b>1,127</b>	<b>1,749</b>

Staff in Specialised Schools for English Language  
Year 2018

