



# English Language Travel Market 2019

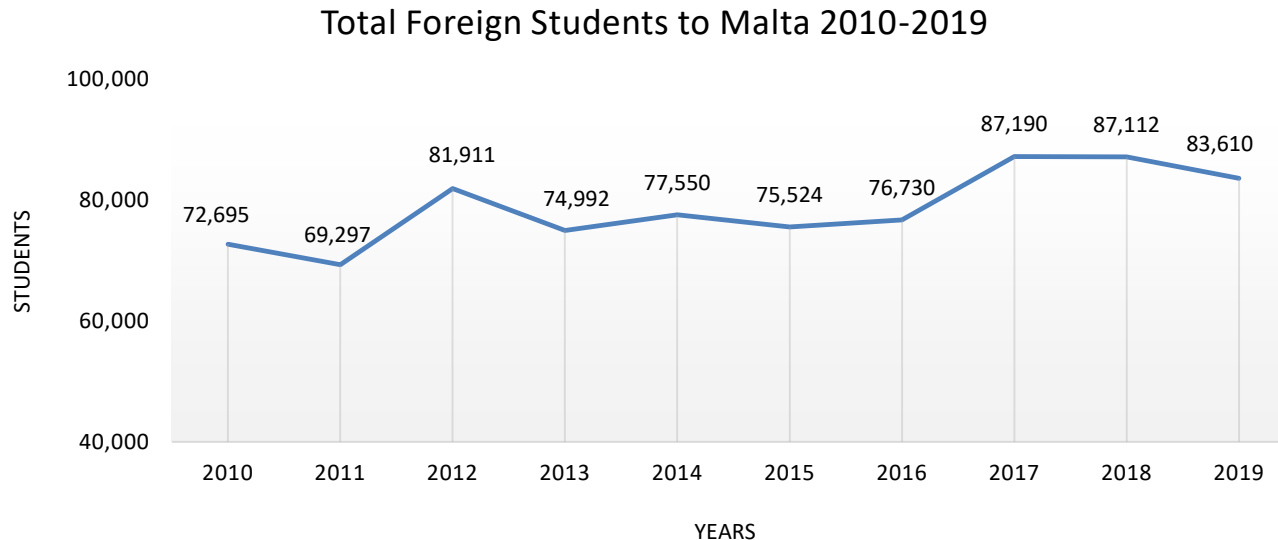
**March 2020**

Based on NSO TEFL News Release, dated 12<sup>th</sup> March 2020



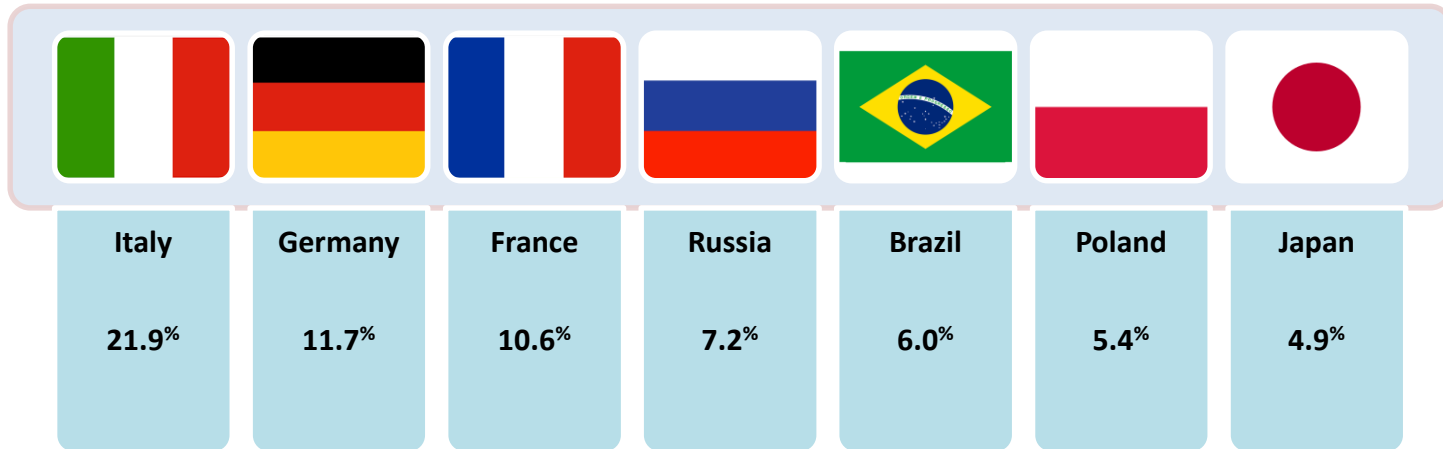
# Total Foreign Students to Malta 2010-2019

- During year 2019, a **total of 83,610** students followed courses at local English language specialised schools in Malta, representing a decrease of 4.0% over 2018.
- From 2010 to 2019 this segment grew at an average annual rate of 1.57%.



# Top Source Markets

- The majority of students attending English language courses in Malta came from **Italy, Germany, and France**. Together, these accounted for 44.2% of total student visits.
- Russia ranked as the 4<sup>th</sup> largest market with a share of 7.2%, followed by Brazil, Poland and Japan.



## Timeseries of Top Source Markets

	2012	2015	2016	2017	2018	2019	Absolute change 2019/2018	% Change 2019/2018	Market Share 2019
Italy	15,712	17,956	18,798	25,594	23,482	18,335	-5,147	-21.9%	21.9%
Germany	11,573	10,364	10,917	10,277	9,991	9,764	-227	-2.3%	11.7%
France	8,485	7,657	8,517	9,138	8,844	8,878	34	0.4%	10.6%
Russia	11,379	5,720	4,156	4,818	5,396	5,997	601	11.1%	7.2%
Brazil	860	2,347	2,621	4,519	4,360	5,000	640	14.7%	6.0%
Poland	1,800	2,749	3,131	4,512	4,501	4,556	55	1.2%	5.4%
Japan	884	1,593	2,394	2,924	3,508	4,106	598	17.0%	4.9%
Austria	4,633	3,751	3,534	3,107	4,363	3,954	-409	-9.4%	4.7%
Spain	5,962	3,269	3,977	3,611	3,971	3,760	-211	-5.3%	4.5%
Switzerland	2,116	2,420	1,965	2,382	2,007	1,785	-222	-11.1%	2.1%
Colombia		739	1,093	1,288	1,297	1,746	449	34.6%	2.1%
Czech Republic	1,661	3,151	1,397	1,475	1,558	1,741	183	11.7%	2.1%
Other	11,091	13,808	14,230	13,545	13,834	13,988	154	1.1%	16.7%
<b>Total</b>	<b>76,156</b>	<b>75,524</b>	<b>76,730</b>	<b>87,190</b>	<b>87,112</b>	<b>83,610</b>	<b>-3,502</b>	<b>-4.0%</b>	<b>100.0%</b>

Over the years, substantial increases were recorded from Brazil, Poland and Japan, ranking as the 5<sup>th</sup>, 6<sup>th</sup> and 7<sup>th</sup> source markets respectively in year 2019.



# EFL Students' Share Out of Inbound Tourists

- Students studying English as a foreign language in Malta accounted for **3.0% of total inbound tourists** visiting Malta in year 2019.
- Brazil has the highest share of students out of inbound tourists, with a share of 31.8%.
- Other markets with a high share of students per incoming tourists are Russia (with a share of 18.5%), Japan (with a share of 15.8%) and Turkey (with a share of 12.6%).

Main source markets	Students Year 2019	Inbound Tourists Year 2019	% of Students per incoming tourists
Italy	18,335	392,955	4.7%
Germany	9,764	211,546	4.6%
France	8,878	239,140	3.7%
Russia	5,997	32,445	18.5%
<b>Brazil</b>	<b>5,000</b>	<b>15,729</b>	<b>31.8%</b>
Poland	4,556	104,228	4.4%
Japan	4,106	25,950	15.8%
Austria	3,954	33,251	11.9%
Spain	3,760	116,296	3.2%
Switzerland	1,785	48,954	3.6%
Czech Republic	1,741	23,421	7.4%
Turkey	1,689	13,392	12.6%
Ukraine	1,437	19,101	7.5%
<b>Total</b>	<b>83,610</b>	<b>2,753,239</b>	<b>3.0%</b>

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

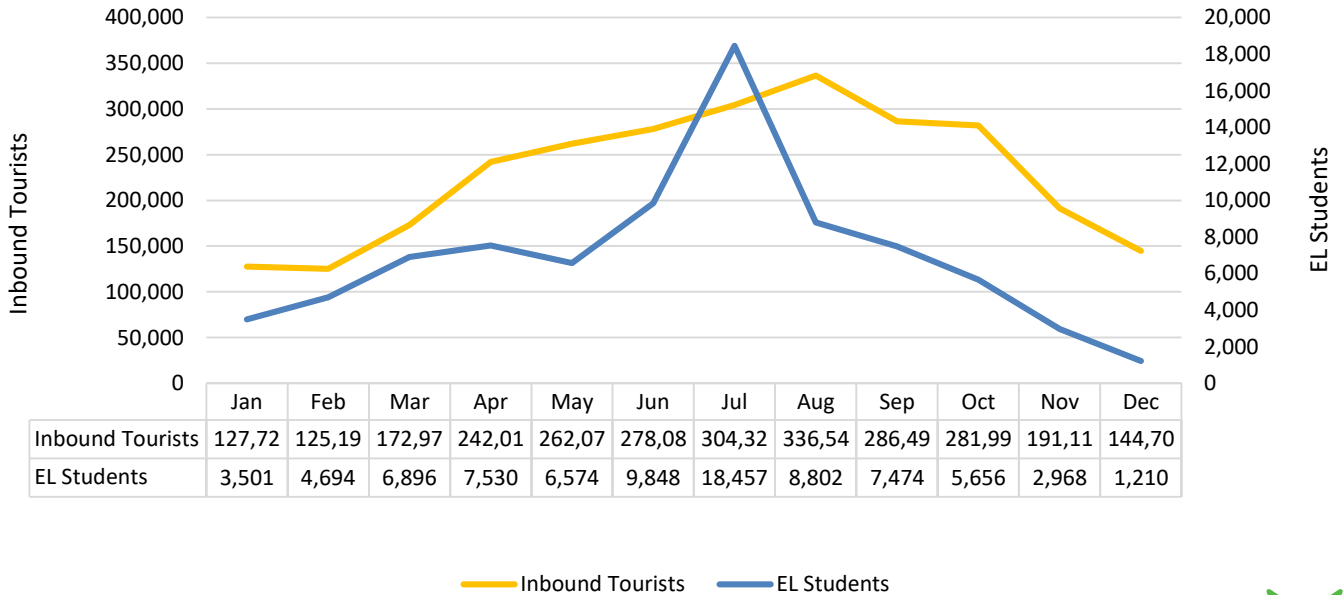


# Foreign Students and Inbound Tourists by Month

Seasonality of Inbound Tourists and English Language Tourists  
Year 2019

July was the busiest month for local licensed ELT schools with 18,457 arrivals, or 22.1% of the annual total.

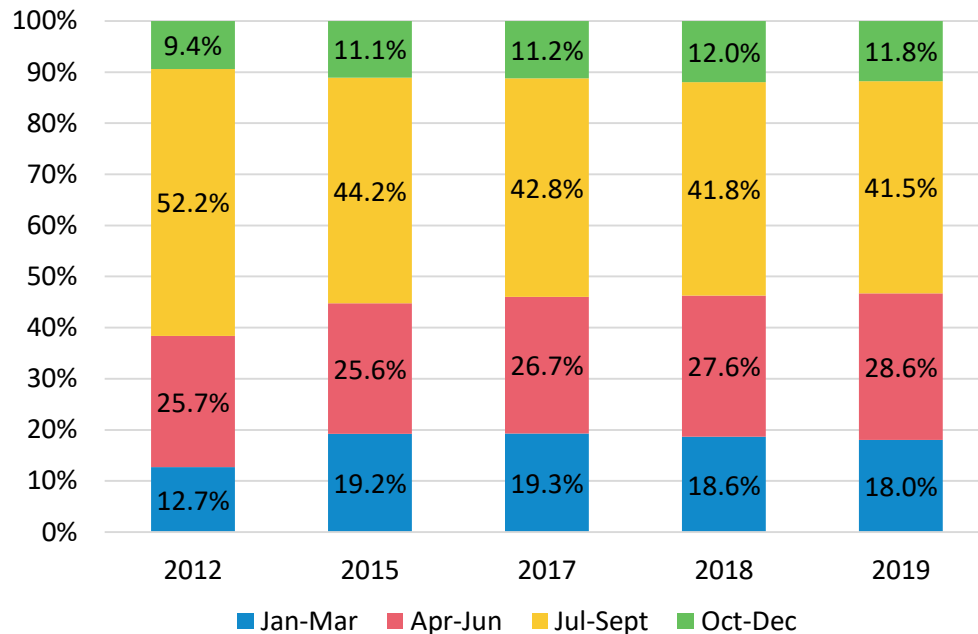
July also had the highest share of students per incoming tourists at 6.1%.



# Seasonality

- The summer months of July to September remain the peak months for learning English in Malta.
- The months of April to June 2019 attracted 28.6% of incoming students.
- Three out of ten students visited Malta during the off-peak months of January to March or October to December.

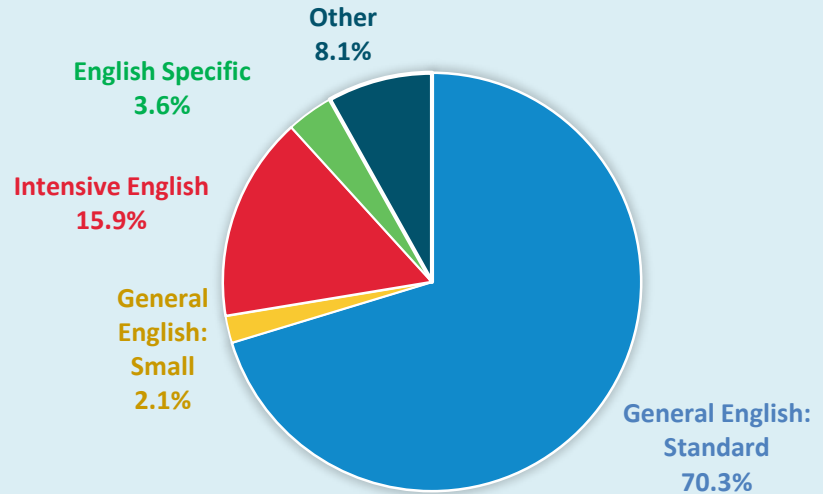
Seasonality of Foreign Students 2012-2019



# Type of Course Followed

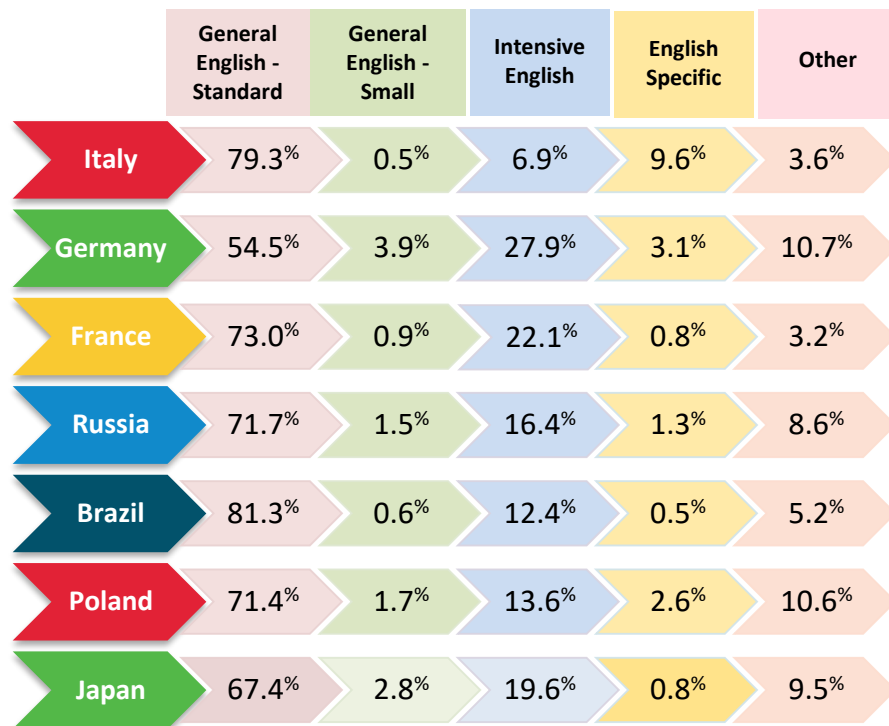
- The most popular course offered by specialised English Language schools is **General English**. 7 out of 10 students followed the Standard course and a further 2% followed the Small course.
- The **Intensive English** course is the second most popular course with a share of 15.9%.
- **English specific courses**, including Business English, had a share of 3.6% of total students.
- **Exam preparation courses, one-to-one lessons and other courses** accounted for 8.1% out of total.

Share of Students by Type of Course Followed: 2019





## Type of Course Followed by Nationality – Top Markets



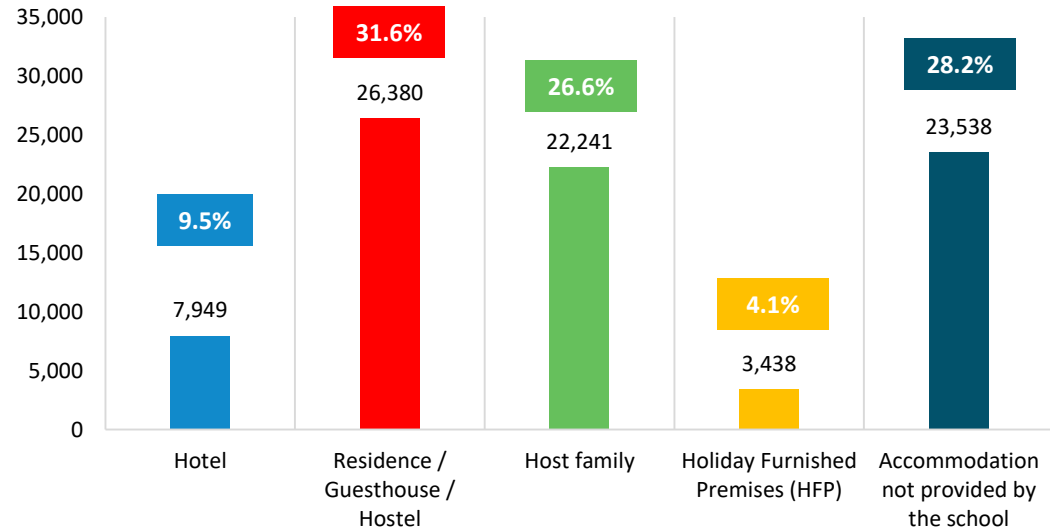
- **General English - Standard** is the most popular course followed amongst all of the studied nationalities. Out of the top seven EFL markets, the share of General English stood highest amongst Brazilian and Italian markets. Other smaller markets with a high share of students following this course include Sweden and Austria.
- The Intensive English course was mostly popular amongst Germans, French and Japanese students.
- The **English Specific** course, which includes Business English, had the highest share amongst Italian students.
- Around 11% of German and Polish EFL students attended **exam preparation courses, one-to-one lessons and other courses.**



# Type of Accommodation Used by Foreign Students

- Around 3 out of 10 students stayed in school residence, guesthouse or hostel.
- 28.2% used accommodation not provided by the school.

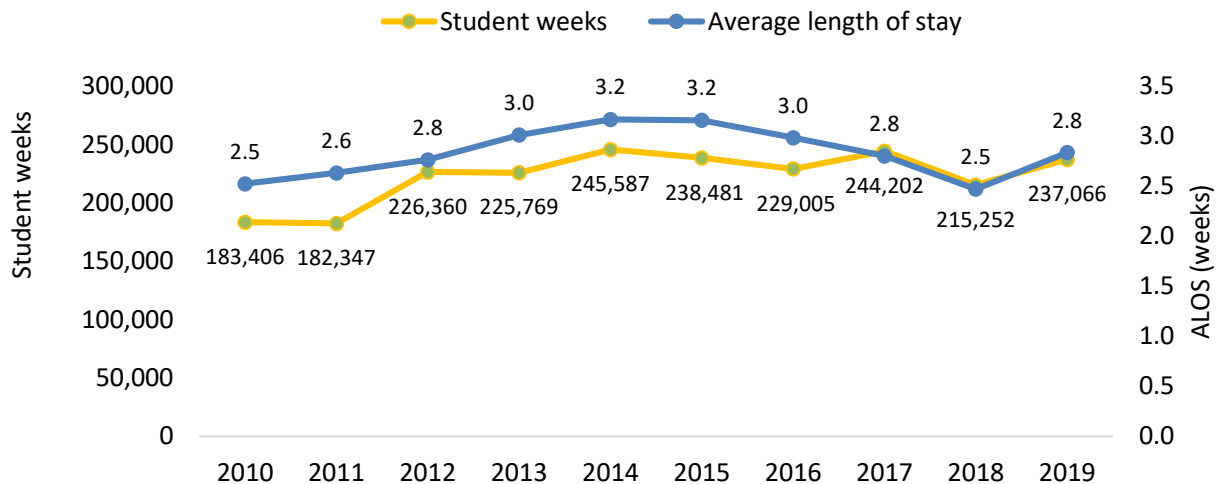
Accommodation Used by Foreign Students Year 2019



# Number of Students Weeks

- With an average length of stay of 2.8 weeks, foreign students enrolled in local licensed ELT schools spent a total of 237,066 weeks in Malta, recording an increase of 10.1% when compared to year 2018.
- The average length of stay increased from 2.5 weeks in 2018 to 2.8 weeks in 2019.

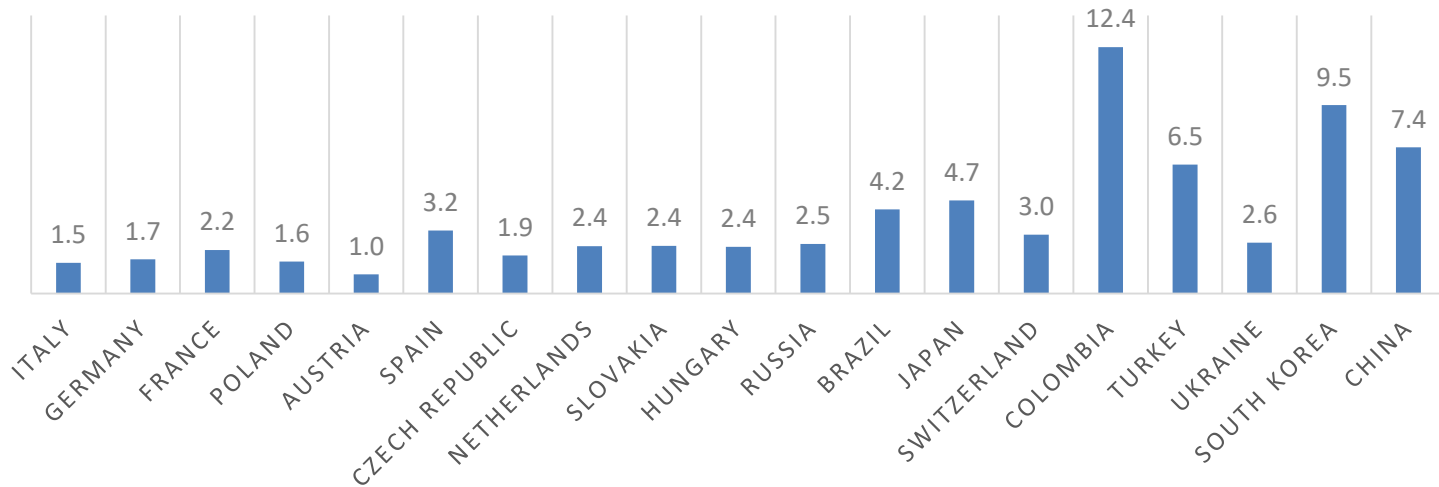
Total Number of Weeks and the Average Length of Stay



# Average Number of Weeks by Market

- English language students stayed in Malta for an average of 2.8 weeks, an increase of 0.3 of a week when compared to year 2018.
- Longer stays were prevalent among students from Colombia (12.4 weeks) and South Korea (9.5 weeks). These were followed by Chinese students with an average duration of 7.4 weeks.

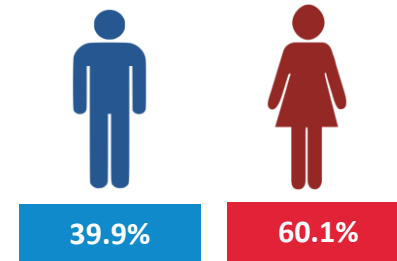
**Average Length of Stay Per Student  
Year 2019**



# Age Group by Gender

- Female students outnumber males and accounted for 60.1% of the entire student population.
- Female dominance is prevalent across all age categories.

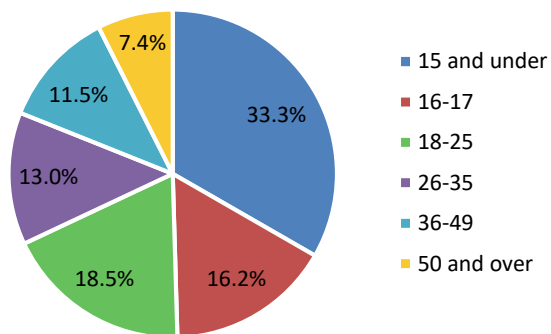
	Male	Female	Total	Market Share 2019
15 and under	11,503	16,346	27,849	33.3%
16-17	5,775	7,799	13,574	16.2%
18-25	6,353	9,083	15,436	18.5%
26-35	3,974	6,936	10,910	13.0%
36-49	3,541	6,076	9,617	11.5%
50 and over	2,227	3,997	6,224	7.4%
<b>Total</b>	<b>33,373</b>	<b>50,237</b>	<b>83,610</b>	<b>100.0%</b>
<b>Market Share</b>	<b>39.9%</b>	<b>60.1%</b>	<b>100.0%</b>	



## Average Number of Weeks by Age Group

- One third of language students were aged **15 years and under**. This group comprised the largest share of students.
- Students aged 50 years and over were in the minority.
- Students aged **18 to 25 and 26 to 35** have the **longest length of stay at 4.9 weeks each**.

Student Population by Age Group



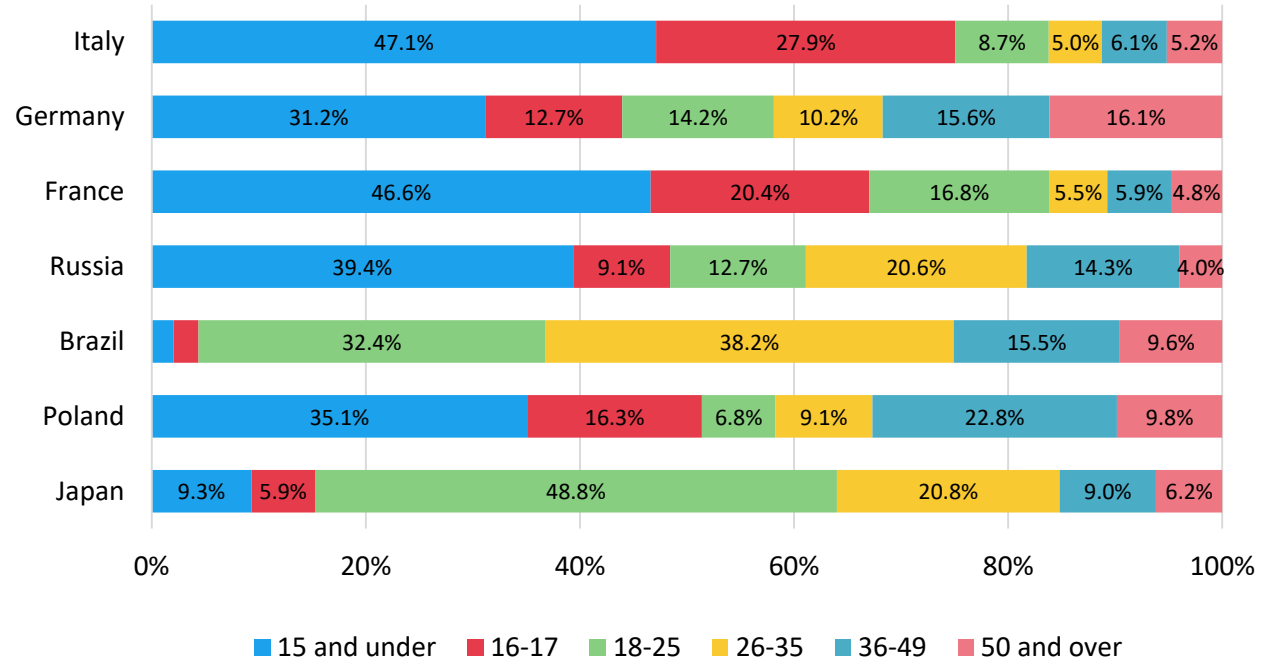
Average number of weeks by age group - Year 2019			
Age group	Total	Total	Average
	students	weeks	no. of weeks
15 and under	27,849	43,130	1.5
16-17	13,574	24,363	1.8
18-25	15,436	74,993	4.9
26-35	10,910	53,672	4.9
36-49	9,617	27,657	2.9
50 and over	6,224	13,251	2.1
<b>Total</b>	<b>83,610</b>	<b>237,066</b>	<b>2.8</b>



# Age Group of Main Markets

- Out of the top main EFL market, the largest share of language students aged **15 years or less** were Italians and French.
- The largest share of Japanese students (48.8%) were 16 or 17 years of age.
- Out of the featured markets, students over 36 years of age were mostly Polish and Germans.

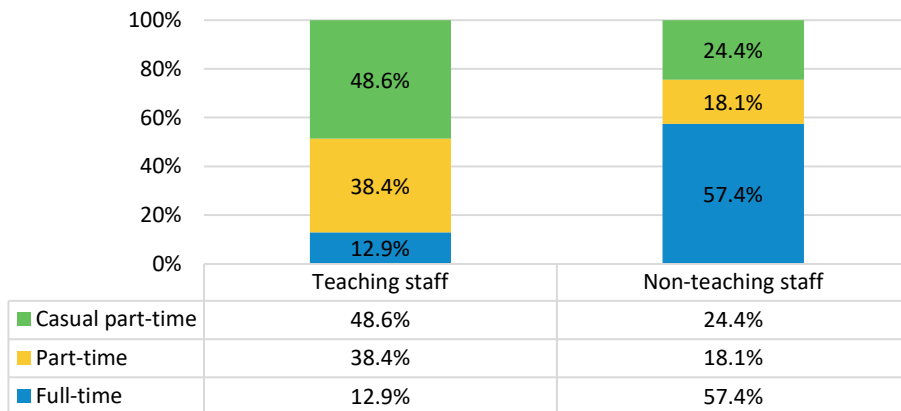
Age Group of Main EFL Markets : Year 2019



# Staff in Specialised English Language Schools

- In 2019, total staff in English language specialised schools numbered 1,796, of which 42.7% were teaching staff and 57.3% were non-teaching staff.
- The largest share of **teaching staff** (31.9%) were between 18 and 24 years of age.
- **Female teachers** accounted for 72.6% of total teaching staff.
- The larger share of teaching staff (48.6%) were casual part-timers whilst the larger share of non-teaching staff (57.4%) were employed on a full-time basis.

**Type of Employment**



■ Full-time ■ Part-time ■ Casual part-time

**Staff in Specialised Schools for English Language: Year 2019**

