The Language of a Pearl
Language Tourism in Malta

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Summary

We have studied the tourism industry for three years, and we were interested in finding a different subject to conclude our studies. Language Tourism, a fairly small but upcoming niche in tourism, and one in which we have some experience, promised to be an interesting dissertation subject. In Europe there are three countries where English is a mother tongue - the United Kingdom, Ireland and Malta. The dissertation focuses on Malta.

Malta is a small island state in the Mediterranean Sea, south of Sicily. The island state has three islands, Malta, Gozo and Comino, and together they enjoy a huge number of tourists, particularly in the summer months when the warm climate makes a good sun and sea destination. The summer season is officially June to August, so there is a problem concerning what to do when the last tourist leaves the island after their summer holiday. The tourism industry has a huge impact on the country and sustains around 30 per cent of the country’s total GDP (Gross Domestic Product). Malta has been promoted for a long time as a sea-side destination, and the Maltese Government Tourist Board traditionally promoted the island for sun, sea and sand, and popular culture.

Back in the 1980s Malta had an established reputation. The Maltese Government now wanted to attract a different type of tourist, the ‘quality tourist’. The type of tourist they wanted to attract would also visit the island during the shoulder months. They were talking about the cultural tourist.

The importance of good cooperation between the language schools and the Malta Tourism Authority is a high priority if the development of steady all-year-round tourism is to be a possibility. Being an island state Malta is likely to suffer more from the issue of seasonality, as islands in general tend to be affected more than inland and coastal destinations. However, Malta’s climate is a major pulling factor.

Language tourism has grown on the island since the 1960’s; today there are between 40 and 50 schools registered on the island. There are three important factors contributing to a language trip: courses, teachers and the leisure programme. Even though Malta is facing competition from nearby destinations in the Mediterranean, it is on its own in this niche market and able to offer students a warm, friendly welcome with a combination of a unique experience and learning.
Words from the authors

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1. Introduction

With the increase of the low-cost airlines in Europe, travelling over the summer months has increased, especially to the summer holiday destinations. In Europe southern European destinations are very popular for a typical sun and sea holiday, but by the end of August the majority of tourists have left the destination. This forms what we call the seasonality issue.

There are countless of definitions for destination, the authors Wall and Mathieson (2006, p.17) define destination ‘ A ‘destination area’ is a place having characteristics which are known to a sufficient number of potential visitors to justify its consideration as an entity, attracting travel independent of the attractions of other locations’.

Many destinations in the southern Europe have the same problems of accommodation, full airports, crowded beaches, etc. in the peak season. There are many islands in the Mediterranean Sea that are considered important holiday destinations, such as the Balearics (Spain), Crete (Greece), Sicily (Italy) and Malta. All of these destinations offer historic places, rich culture, heritage and cuisine to their tourists. The local people have lived with seasonal tourism variations for many years, so the problems are not new. The Island destinations mentioned above experience more serious seasonal changes than other inland tourism destinations. This is because inland towns and cities have a continuous tourist flow of tourists all year round, and these may also visit the sea destinations for a shorter period over the winter /shoulder months (Baum, Hagen, 2007).

The purpose of this dissertation is to focus on the issue of seasonality and look at English Language Tourism, might have in making this issue less pronounced, focusing on a small island state in the south of the Mediterranean - Malta.

Malta is an island state with 440,000 inhabitants, consisting of three islands, the main island Malta, Gozo and Comino. Gozo has approximately 30,000 inhabitants, Comino only six and the remainder live in Malta. The reason for this niche of tourism existing in Malta is due to its history. Malta was an old British Colony, and is one of the few countries in the world that has two official languages, English and its own language Maltese (Sciriha, Vassallo, 2006).
Language tourism started in the 1960s in Malta. At the start there were 22 schools registered on the island, whereas today there are between 40 and 50. Overall, language tourism contributes 5-10 per cent of the total tourist arrivals for the islands. The total tourist arrivals for Malta in 2007 were 1.1 million, out of whom 63,700 were language students. The difference between this form of tourism and standard mass tourism is that stay are combined with learning as well as an activity programme and sightseeing. Due to the warm climate the country enjoys, it receives a large number of tourists over the summer (official) season. The off season, October-March will here be referred to as the shoulder months (NSO, Malta, www.mta.com.mt).

Language tourism is already important for the country but there is room for growth, in comparison with the mass tourism market. A director said; ‘Malta has hit its saturation point’, and tourism development from here needs to be focused on the shoulder months.

In Europe Malta is facing a big competitor, the United Kingdom. Around the world other competitors are the United States, Canada, Australia, New Zealand and South Africa. All these competitors have special attractions to offer to students, from natural resources to the
host population, and studying English while they visit (Interview, MTA, 080515, www.felton.com).

In order to be able to achieve all-year-round tourism there has to be good co-operation between the parties involved in the English Language sector (EL) in the country. According to the Ministry of Tourism's National Plan (2006) they mention that they will encourage the private sector to attract more students, over the winter months. The pattern at the moment is that the islands are receiving a large number of students as well as tourists over the summer months. The high impact the tourists have on the environment is becoming more of an issue from year to year (Andriotis, 2005).

As this tourism niche has been around in the country for some time, there are research and statistics for this market, available for use in order to be able to develop and expand markets. The main markets for Malta, with regard to Language Learning, established by the Malta Tourism Authority (to be referred to as the MTA), are Germany, Italy and France. The schools are located on both Malta and Gozo; although they are two separate islands they are working together in order to develop year-round tourism. This initiative will not only be of advantage to the schools, it will be of use for the whole country, as tourism is such an important industry for the islands (www.mta.com.mt).

The Malta Tourism Authority and the Ministry of Tourism are in charge of the tourism industry in Malta. They work closely together and are marketing Malta overseas. Focusing on language tourism, they are in charge of the standards and controlling establishments around the islands (www.mta.com.mt).

The foremost important aspect in this dissertation is seasonality and the problems that this has been causing, and is still causing, at many destinations. Neighboring destinations, previously mentioned, are all facing the same problem as Malta. The difference is that, unlike Malta, they are not enjoying the possibility of another different form of tourism. The problem with seasonality increases when the country in question is small.

Andriotis (2005) has experienced the seasonality theory and the employment situation, the over-use of facilities, and the low return on investment for tourist enterprises. As well as drawing attention to the problems, he focuses on two response options: extending the existing tourist season into shoulder periods, or creating new seasons of tourism activities.
1.2 Purpose
This dissertation focuses on the issue of the seasonality, Malta’s tourism industry and what it means to be an island state. The potential growth for language tourism is identified and whether it is possible to increase the influx of tourists to Malta over the shoulder months.

1.3 Problem
Following the purpose we have identified the following question that we will focus on:

- What is the potential growth for language tourism in the Maltese Islands?

1.4 Target Group
This dissertation will be targeting the language schools and the tourism industry.

1.5 Reason for choice of subject
Following two summers of working within the language tourism sector as a leader on Malta, Heidi found this industry interesting and wanted to research its potential. She had found Malta interesting as a country, and she had experienced the high season and knew how important the tourism industry is for Malta. Ivana was also keen to undertake research into this different aspect of tourism.
2. Methodology

There are two different types of methods, the qualitative method and the quantitative method. Methods are tools that are used to reach the goal which you have for your study. Each method has its own respective strengths and weaknesses, and it is important to choose the right research method to get the type of results required. It is also important to know that the method is a tool and doesn’t give an answer to the questions you have, but must be used to help you to gather information for your study. All methods are not suitable to use in every study and it is important for you as a researcher to choose the right method. The most significant point between the quantitative and the qualitative methods is how the researcher uses the numbers and statistics that have been gathered. It is important to make sure, when you are choosing your method, which it has a starting point in the issue or the problem the study is dealing with (Solvang, 1997).

The quantitative method is often more structured and is also more formalised then the qualitative method. The quantitative method can be controlled by the researcher. It also shows what approach the research is taking in considering the study’s issue or problem. This method also tells us which answers are suitable. A selectivity and space is used to the information source. To make formalised analyses and comparisons, but also to test the results of the research, it is important to take everything in consideration. This will make it possible for the researcher to comment upon the results. Statistical measurements play a central role when you are analysing the quantitative information (Solvang, 1997).

An insignificant amount of formalisation is used in the qualitative method. The qualitative method is often used to understand something. The information is not tested to see if it has general validity. This method is used to gather information in different ways to get a deeper understanding of the issue we are studying as researchers. With this information researchers also can describe the entire consistency. The thing that distinguishes the qualitative method is the closeness to the source that we are gathering our information from (Solvang, 1997).

In this study we have chosen the qualitative approach to our study. This is because we need to interact closely with the people interviewed, and we found it to be the best method to use when we were gathering all the necessary information for this study.


2.1 Qualitative Method

The qualitative method is a generic term which describes the way a researcher chooses his method to undertake the research. This consists of five different techniques:

1. Direct observation
2. Participating observation
3. Information
4. Respondent interviews
5. Analysis of sources

These are all highlighted and expounded in depth by the researcher Solvang (1997).

The qualitative method has a distinct feature in seeking to exceed the subject-object relationship. Subsequently, the researcher is seeking to evaluate an issue from both sides of the fence. This helps to establish an objective approach to the study under review (Solvang p.92).

There are no specific hard and fast rules governing the practical execution regarding the qualitative method (Solvang, 1997).

It is imperative that the researcher should be objective when performing a qualitative research. Their relationship and familiarity to the object being studied is equally important. Any prejudice and preconceived opinions should preferably not be included within the research. The person who is chosen for the interview should preferably be interviewed face to face. This personal form of interviewing helps in providing a more holistic approach to the research problem and ultimately the research design. The researcher needs to familiarise himself with the respondent so that a more profound profile can be established. This approach helps a more direct appreciation of the research - not just in terms of outcomes but also in terms of methodologies adopted (Solvang, 1997).
2.2. Performance

In order to give a good picture of the issue that is to be covered a few interviews were made in order to get a wide perspective. As the government plays an important role, the Malta Tourism Authority was approached in this matter and employees within the EL sector. With these interviews the researchers had the advantage of a governmental point of view and could combine this with the view from the management side of the private sector.

2.2.1 Selection

When using the qualitative method special techniques are used in order to make your selection. This can sometimes mean that the information chosen is too simple. However, there is also a degree of truthfulness, which highlights how representative our research is. What is important is that the selection must give a true picture of the outcomes of the research. The representativeness of a quantitative method is not too difficult to assess but only if the research is being made on the people who are part of the selection. There are two factors that can affect the final results and make them invalid. The research can become invalid if the researcher becomes too emotionally or intellectually involved with the respondents. One important point is to research only what is to be researched. The qualitative research method assumes there is a distance between the researcher and the object that is being studied. From this information many interpretations can be made, and misinterpretations can lead to misunderstandings and wrong conclusions that are without foundation (Solvang, 1997).

Even when the researcher notices that the information material is not valid this can still be analysed with the tool of statistical techniques. The most important reason for this is that this method is constantly showing proofs of targeting the right object when researching social relations (Solvang, 1997). Our selection of respondents was carefully chosen in order to get different responses, but also to note where there was agreement. Our choice of respondents was the MTA, a director, HR Manager, Director of Studies and an owner/director, all working at different schools. The similarities of the respondents are that they have many years of experience within the business in various fields, which made the interviews interesting.
2.2.2 Interviews

There are diverse types of interviews ranging from the structured to unstructured. The questions for a structured interview are decided before the interview (Solvang, 1997).

For the compilation of this research, the researchers decided to adopt the unstructured type. Some set questions were designed prior to the interview. Other questions developed spontaneously during the interview. It is interesting to note that the unstructured interview gave space for further questions, which served as leads to enable the researchers to understand the subject/issue under review in substantial depth. The reason for using this type of interview is to enable the researchers to retrieve as much information as possible from the oral sources (Solvang, 1997).

A decisive factor in a qualitative method is what is being studied. If the researcher chooses the wrong person to interview, it can mean that the whole research fails and becomes useless. The phenomenon that is chosen for the research helps the researcher to get deeper into the subject and give a better and clearer picture of the information that has been found. When the researcher has chosen a qualitative interview the choice is neither by mere accident nor temporary. It is more a systematic as well as a deliberate choice. Interviews have their foundation within the frame of the choice of theory that plays an important role in the choice of subject. Questions that have a clear foundation are and can be elaborated during the interview (Solvang, 1997).

There are two types of interviews - a respondent interview and an informant interview. The respondent interview means that the person is part of the phenomenon that is studied. The informant interview can be called a source, someone seeing the subject which is being studied from the outside (Solvang, 1997).

The interviews carried out for this dissertation had four different respondent interviews, which were all made with people that have different positions within different language schools in Malta, and one informative interview that we made with the MTA. The other interviews had four different respondents and the interview questions were made prior the interviews, but other questions did appear during the interviews. The information that we retrieved from these interviews has helped us to draw our own conclusions in this research. More structured interviews were made by telephone and also personal interviews. These interviews had structured questions, prepared prior the interviews.
The questions were sent out to the persons being interviewed in advance and they later answered the questions when we met them face to face. One of the interviews was made over the telephone and this interview also contained structured questions that were answered by the person being interviewed. Questions in this interview were also sent out in advance to the person being interviewed so they could be prepared ahead.

2.3 Primary and secondary sources

The interviews that were carried out are used as a primary source as well as to relate with the theories expounded within the literature review. The Maltese Tourism Authority’s homepage is effectively employed as a secondary source, together with other relevant pages for the study. The researcher, for his part, considers that the primary source must be of relevance and trustworthy. Subsequently this can be helped by 'originals' such as official statistics and alternative scientific literature (Solvang, 1997).

By means of secondary source scientific writings, PhD reports and theses within various science journals will be taken for granted. The author has been rather strict in controlling and comparing the data, so as to ensure that there is a direct link as regards to the information presented. In this case, the encyclopaedia is moreover considered as a secondary source (Solvang, 1997).
3 Malta and Language Tourism

3.1 Malta

In the south of the Mediterranean Sea, at end of Europe, and just south of Sicily (Italy), you will find the Maltese Islands (with a resident population of 440,000). The country consists of three islands, Malta, Gozo and Comino, with Malta being the largest and most densely populated. The Islands joined the European Union in May 2004, and adopted the Euro in 2008. Malta has a bilingual culture, with the Maltese and English language spoken alongside each other (Scrihia, Vassallo, 2006).

Tourism is a major contributing factor to the Maltese economy, sustaining around 30 per cent of the islands' total GDP. Malta has a great natural and cultural experience to offer tourists. The Islands have a rich archaeological and historical wealth, influenced by diverse cultures, foremost Italian and British. Some factors which explain the growth of tourism in Malta are safety, accessibility from other states, the flexibility and the initiative of the Maltese who have adjusted to the needs of their various guests (www.visitmalta.com, www.mta.com.mt).

The Mediterranean climate of the islands attracts a huge number of tourists in search of the traditional sun and sea holiday. More and more people are also coming to the islands to study English, as the country is officially bilingual, English and Maltese. (Scrihia, Vassallo, 2006).

Over the past years there have been many changes that impacted negatively on the Maltese hospitality industry, and local stakeholders tend to have no control over them. The global tourism industry reacted to the growth of international terrorism with signs of vulnerability. The tourism industry within the Mediterranean has also suffered a negative impact from inflationary pressures on the part of tourism-generating countries (Fsadi, Selwyn, 1996)

Malta faces intense competition from a host of other destinations within the Mediterranean - in particular the Balearics (Spain), Crete (Greece), Sicily (Italy) and North Africa (Morocco, Egypt and Tunisia). All these destinations enjoy a Unique Selling Proposition (USP); thanks to this they can differentiate and highlight the particular benefits of their host country. Initially, Malta adopted a Mass Marketing strategy. This was considered appropriate in view of limitations of its infrastructure, and the need to compete within the price-sensitive segments (Briguglio, Vella, 1995).
However, lately Maltese stakeholders within the industry have embarked on a highly ambitious upmarket strategy. This option was appropriate in view of various considerations. One central factor is the growth of aspirations on the part of the prospective tourist, together with the highly competitive nature of the industry. Further, many stakeholders believe that the upmarket strategy will generate higher levels of revenues, and thus an injection of foreign income within the economy. An upmarket tourism strategy attracts quality tourism. (www.visitmalta.com).

Malta has long been promoted as a sea-side destination, and the Maltese Government Tourist Board promoted the island more for the sun, sea and sand, with popular culture. Back in the 1980s Malta had an established reputation. The Maltese Government now wanted to attract a different type of tourist, the quality tourist. The type of tourist they wanted to attract would also visit the island during the shoulder months. They were talking about the cultural tourist. This change was shown in a brochure in 1992 by the National Tourist Organisation (NTO), which aimed to offer more than just the sun and nightlife. The brochure gave more emphasis to the shoulder months, explaining the islands' geography, history, population and culture in detail. Malta was here experiencing a change in its promotion (Fsadi, Selwyn, 1996).

3.1.2 History

For the past 7,000 years Malta has been inhabited. The first signs of civilisation on the island can be found in form of large stone temples. Some were erected around 1,000 years before the famous pyramids of Giza. Nowadays these are considered to be the oldest freestanding monuments in the world. The Neolithic tribes were the first to step on the island, and in 2,000BC the island was conquered by the Phoenicians, Carthaginians and Romans (Zammit, 2007).

Malta has been Christian apart from a period of Arab occupation in AD870 until 1090, when it was conquered by the Normal Sicilians who remained in control until 1530. The Maltese language had its foundation during the Arab period. Malta was handed over to the Knights in 1530 by Charles V, which had a positive and significant effect. The living conditions on the island were improved, hospitals were built and the trade and commerce market got a start and forts were built (www.malta.com, www.visitmalta.com).

The great and magnificent Suleiman sent his navy in 1565 to Malta to remove the Knights. His goal was to make Malta his base, which he could use to attack southern Europe with the Ottomans. He succeeded in the southern part of the island and took over the countryside. The
Knights did not give up hope on Malta and, in September 1565, relief forces arrived and the Ottomans abandoned the siege and the island. This war had caused many casualties. After the Great Siege of 1565 was over, Malta established itself as an important strategic fortress. Not only did this victory bring glory to the island and the people for culture, arts and architecture, but the Grandmaster, Jean Parisot de la Valette, laid the foundation for a new fortress city which was to become Malta’s capital, Valletta (bearing his name) (Scrihia, Vassallo, 2006).

The history of the following 268 years has been equally important to the Maltese islands. Napoleon attacked the island in 1798 and conquered it. Following the conquest a civil code was laid down for Malta. Slavery was abolished and the Turkish slaves were freed. Napoleon created during his time on Malta a primary and secondary education system. He also managed to achieve a more science-based university, which replaced the old form of university (Scrihia, Vassallo, 2006).

Shortly after Napoleon the British throne took over Malta for the next 160 years and ruled the Islands. Due to its location Malta was bombed by the Germans during the World War II. Germany wanted Malta as it was strategically placed for a European conflict. For two months in 1942 there were more bombs dropped on Malta than on London during the entire war. Even during the hardest times neither the Maltese culture nor spirit could be broken and the island was awarded the George Cross by King Georg VI (Scrihia, Vassallo, 2006).

‘To honour her brave people I award the George Cross to the Island Fortress of Malta, to bear witness to heroism and a devotion that will long be famous in history’ (www.malta.com).

This cross can today be seen in the Maltese flag. The Maltese were granted their independence in 1964 and then they also became a neutral republic. It was this neutrality and peacefulness that led Presidents Gorbachev and Bush to attend a summit aboard a ship anchored at Marsaxlokk bay. This summit effectively ended the cold war (Zammit, 2007).
3.1.3 Government

‘The mission of the Malta Tourism Authority is to advance the economic and social activity of tourism in the national interest, by working with all stakeholders to develop a sustainable industry for current and future generations’ (www.mta.com.mt).

The MTA was established in September 1999 and has overseas offices in the United Kingdom and Germany with representatives around Europe in Austria, Switzerland, Czech Republic, France and Sweden just to mention a few (www.mta.com.mt).

The Ministry of Tourism and Culture (MTAC) works closely with the Malta Tourism Authority. It provides the Tourism Authority with the necessary funding for Malta to be able to market itself overseas, as a travel and tourism destination. The ministry sets the policies and monitors the implementation of the Tourism Authority's strategic plan to meet the tourism industry's needs. Malta has improved as a tourism product, and the tourism authorities set the standards for accommodation and establishments around the islands (www.tourismandculture.gov.mt). The two authorities work in close contact with each other to ensure that the development of Malta as a destination is working in a positive direction (www.tourismandculture.gov.mt, www.visitmalta.com).

3.1.4 English Language Learning segment

The National Tourism Plan in Malta is stressing the importance of the niche sector of English Language Learning (ELL) on the island. Therefore it is important to understand the role of the government, in this case the MTA and the Ministry of Tourism and Culture. Their plan will be specified in this section.

The Ministry of Tourism says they will work closely with the police, FELTOM (Federation of English Language Teaching Organizations of Malta), and the language schools (including the host families). They aim reduce the impact on the environment during the peak season. They continue to try to increase seat capacities to Malta with the low-cost airlines. The Ministry says Malta must attract secondary and tertiary education groups, through marketing the island for its geographic and sociological attributes.

The Ministry believes that the MTA should work more closely with the English as a Foreign Language (EFL) Monitoring Board. This is to make sure the tuition is being delivered according to professional standards. In addition the private sector will be encouraged by the Ministry to attract more students during the winter months (www.tourismandculture.gov.mt).
‘We will support private sector efforts to improve quality of instruction delivered at EL schools and quality of programme organized. Differentiated and specialized language learning needs to be developed by start-ups. We will support quality initiatives aimed at increasing the number of students coming over in the shoulder months’ (www.tourismandculture.gov.mt)

[We will] capitalize more on English Plus courses. Particular attention should be given to the development of the adult market and specialized courses aimed at attracting the mature, higher-spending clientele. We will develop a code of ethics for the English Language sector in order to ensure that proper behavior is manifested by EFL employees. MTA will also support training courses aimed at EFL teachers, group leaders and event organizers. We will strengthen our efforts on the Asian and South American markets. We will ensure that flight connections between major European Airports and Malta are in place to assist these efforts (www.tourismandculture.gov.mt).

The Government will analyze the impacts made by EL students staying for longer periods and searching for part-time job to sustain them and to assist them in practicing their English. MTA will support initiatives aimed at encouraging more families to host students. MTA will also invest in training for the host families (www.tourismandculture.gov.mt).

The MTAC states that they will have to work closer with the Ministry for Justice and Home Affairs (MJHA) as well as the Police. In the first instance this is to increase the safety in the entertainment areas. A good working relationship with the Malta Transport Authority (ADT) is also of importance. This is to ensure the frequency of the bus connections between the different tourism zones as well as connections between Malta and Gozo. The private sector will carry out the necessary studies in order to assess which new markets can be tapped for the EFL segment (National Tourism Plan, 2006).
3.2 English Language Tourism

English Learning is an established niche in Malta. English language learning is a mature segment, targeting specific submarkets, for example business English and age-group 25+. The main generating markets for the Maltese archipelago are Germany, Italy and France (www.visitmalta.com).

The established English language schools in Malta founded a national body in December 1989 – FELTOM, their objectives are to set, improve and ensure the maintenance of standards in all aspects of the EL market in Malta. Primarily they are interested in the academic content, but also the services which together form the infrastructure of a language stay (www.feltom.com).

FELTOM is the Maltese counterpart of English UK - the association of accredited private and state English language centers in Britain, and of MEI-RELSA - the Irish association of schools recognized by the Advisory Council for English Language Schools.

FELTOM Fact File

- self-regulating national body
- established codes of conduct and national standards of service for its members
- monitors and maintains such standards of service
- maintains a professional identity for its members
- promotes Malta as an English language learning destination of quality and repute
- formally recognized by English UK (formerly known as the Association of Recognized English Language Schools) as the sole Malta Association of English Language Schools that promotes quality and customer protection
- invited by English UK to participate at the annual International Languages & Education UK Fair

The language tourism niche has expanded rapidly throughout the past decade. Language schools, in particular those focusing on English, a global language, have been organised largely within FELTOM. The underlying objective is to ensure a quality product to their esteem guests (http://www.feltom.com).
The main established competitors within the Language Tourism industry include the UK, America, Canada, Australia, New Zealand, Ireland and South Africa. Competitors enjoy diverse natural resources which they offer to their students, together with prospects of working within the host country while studying English. This combination is highly attractive, since it ensures the sustainable development of language tourism on a year-round basis. It is, however, difficult to establish new language schools, since there are already 40 to 50 registered on this small island. Together with the national authorities, FELTOM is working on marketing initiatives to attract visits from potential agents. FELTOM is evaluating the strategies the EL sector associations are adopting, that is to search for and encourage prospective businesses. The EL sector has had a degree of success, with the seasonality factor particularly important. One way this has been achieved is by launching more tailor-made programmes throughout the winter season (www.feltom.com).
3.3 Malta Statistics

The globalisation of English is also apparent from the number of students attending language courses within the Maltese archipelago. In 2006, 65,983 foreign students undertook courses in one of the 36 English-language centres. There was a higher degree of participation by female students than male. The age factor is also of prime importance, since English as a global language is gaining ground not only among teenagers but also among older students. This is typical not only in the case of Malta as a language centre, but within practically all language centres worldwide. The interest in English is generated from a wide diversity of countries ranging from North Africa, Europe, the Middle Eastern and the Far Eastern regions. However the highest level of interest in English language study has been from the EU countries. Since Malta joined the European Union, many EU citizens tend to prefer Malta to other non-EU countries. Among these, 77.1 per cent came from EU Member States in 2006, thus implying an increase of 5.2 percentage points over the previous year. Africa and America accounted for 2.6, 0.4 and 0.4 per cent respectively (www.nso.gov.mt).

Throughout 2006, 5.9 per cent of the gross numbers of tourists visiting Malta were foreign students, who came specifically to the island to learn English. This is worth commenting on. In some generating markets the number was appreciably high, particularly in the case of Ukraine, Slovakia and the Czech Republic. For instance, out of every hundred tourists coming from the Ukraine, 42 were English Language students (www.nso.com.mt). Statistically last year the language learning segment contributed to a total of 5.4 per cent meaning 63,700 tourists. It also contributed to a total of 10.1 per cent guest nights and 9.6 per cent of total tourism expenditure. Students aged between 21 and 25 years tended to stay longer in Malta with an average stay of 26 days. By contrast, the shortest stays were recorded among students aged 15 years and under, and also those aged 16-17 years, with an average duration of 15 days per student. Austrian students had the shortest stays with an average 11 days per student. Although the figures support summer as the most popular season among foreign students, the longest stays tended to be in winter. With regard to the seasonality factor, it is imperative to note that 57 per cent visited Malta during the summer months, in contrast with 43 per cent who visited Malta in the other seasons, which can be referred to as the shoulder months (www.nso.gov.mt).
English Language teaching to foreigners in Malta has expanded, particularly in terms of the numbers of teaching staff employed. In fact in 2007, there was an increase of 6.3 per cent over the previous year. The vast numbers of these teachers are employed part-time. In fact only 7.8 per cent in 2007 were employed on a full-time basis. With the development of English Language schools, there is a likelihood that more full-time teachers are going to be employed (www.feltom.com).

Statistics 2007

<table>
<thead>
<tr>
<th>VOLUME</th>
<th>English Language Learning</th>
<th>Market Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Quarter (Jan-Mar)</td>
<td>6,200</td>
<td>9.7%</td>
</tr>
<tr>
<td>2nd Quarter (Apr – Jun)</td>
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<tr>
<td>3rd Quarter (Jul – Sept)</td>
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<tr>
<td>4th Quarter (Oct – Dec)</td>
<td>9,800</td>
<td>15.4%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>63,700</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

Figure 2 The Language Segment 2007

The MTA is constantly working in developing markets. Germany accounts for 25.4 per cent of the total language tourists, followed by Italy on 14.2 per cent and France on 10.7 per cent. There has always been a good relationship with the Italians due to their location and the climate, which Italians find attractive. The MTA needs to work on developing the market for the Nordic Countries, France, Italy and Belgium. The total tourist arrivals for 2007 were 1.1 million (www.nso.gov.mt).
The National Statistics Office has a comparison of the source markets for Malta with the average length of stay over the years 2004/2005. The majority of countries experienced a drop, apart from Poland and Austria which remained the same (NSO, 2006).

Figure 3 Average Length of Stay 1
The NSO also conducted some research back in 2004/2005 regarding the pattern of student travelling. As can be seen from the graph, the majority of students travelled over the summer, the shoulder months had a significant fall in numbers, and the winter months experienced a drop of over 20 per cent from the shoulder months (National Tourism Plan, 2006).
4 Theories

4.1 The seasonality factor

According to Butler (1994) there is no general accepted definition of seasonality, that reference particularly to tourism. Though he defines seasonality to be; ‘a temporal imbalance in the phenomenon of tourism, [which] may be expressed in terms of dimensions of such elements as numbers of visitors, expenditure of visitors, traffic on highways and other forms of transportation, employment, and admissions to attractions’ (Butler, 1994, p.332).

Another author, Hylleberg (1992, p.4) also tried to define seasonality ‘Seasonality is the systematic, although not necessarily regular, intra-year movement caused by changes in the weather, the calendar, and timing of decisions, directly or indirectly through the production and consumption decisions made by the agents of the economy. These decisions are influenced by the endowments, the expectations and the preferences of the agents, and the production techniques available in the economy’.

The seasonality factor shapes the prospects of the tourism industry, in relation to the respective destination - in our context the Maltese archipelago.

Seasonality is a very distinctive feature in tourism but it is also the most typical characteristic of the tourism industry on a more global level. The tourism industry is highly subject to the seasonality factor. This is typically the case for continental destinations, but most significantly for island destinations, which are highly dependent on the hospitality industry. Planning has been carried out by national tourism authorities aimed at balancing tourism arrivals throughout the year. It is important to note that the respective degree of planning and the incentives which are being granted show that seasonality is still a major issue, posing specific problems (Carlsen, Getz, 2000).

Most tourism destinations have been trying to extend their season, but the development of a new market, to cover the shoulder months, is a challenge on its own. Seasonality is something that impacts upon all aspects of the supply side of the tourism industry. This includes, for example, marketing, business finance, etc. Upmarket tourists tend to travel throughout the year, not merely within specific seasons. Moreover it should be noted that island destinations
tend to experience season changes more profoundly in comparison with other larger tourist bound destinations (Baum, Hagen, 2007).

Seasonality can be a natural and an institutional thing according to Butler (Baum, Lundtorp, 2001). Naturally seasonality is formed by the climate, temperature, rainfall, snowfall and the daylight hours. It is most marked near the polar circle and near the equator, with extreme temperatures and monsoon rainfall (Baum, Lundtorp, 2001).

Baum and Lundtorp (2001) states Flognfeldt, who thinks some destinations have to learn to live with the strong seasonality. Also they have to fit different types of tourism production into the seasonal pattern. The Institutional seasonality is more affected by our own human decisions. It has many aspects and is not as predictable as the natural form of seasonality. It is affected by issues of culture, religion and ethics, but also the social factors. School and business holidays are factors that affect institutional seasonality. They make great fluctuating demands on the tourism services being offered. Institutional seasonality is also often affected by fashion, which influences our choice of destination. Sport can also influence the choice of a destination - skiing, hunting, and the consequent need for sun hours are examples (Almedia, Kastenholz, 2008).

Seasonality has always been seen as a great problem within the tourism industry. These problems and difficulties can include access to the capital city, obtaining and keeping full-time staff, low returns on investments, and also overuse of facilities during the peak season (Andriotis, 2005).

Andriotis (2005) indicated that seasonality is mostly apparent within tourism dependent on destinations. Most of the strategies adopted by both the private and public sectors to combat seasonality can be directly traced to three main factors:

- Diversification of the product mix
- Change of the customer mix
- Aggressive pricing

Andriotis (2005) further indicated that these fluctuations are attributed to divers factors these are mainly climatic conditions, human decisions, inertia or tradition. The supply restrictions results in various problems for the tourist-receiving destinations.

Among the problems for tourist-receiving destinations which are created by seasonality are:
• Seasonal environmental congestion
• Low return on investment for tourist enterprises
• Overuse of facilities
• Off-season unemployment

Andriotis, (2005), Baum and Hagen (1999) highlighted the point that island destinations tend to suffer most by seasonal tourism. There are many aspects of this tendency, in particular:

• Accessibility difficulties during the winter
• Distance from large urban centres
• Limited local market
• Dependence on carriers and tour operators

Figure 5 (on the next page) developed by Butler and Mao (1997 is illustrating the seasonality issue in the middle surrounded by the demand, supply and modifying processes. The model below was developed by Butler and Mao (1997) to illustrate the seasonality issue in the middle and demand and supply and modifying process.

Butler and Mao (1997) are emphasizing that tourism seasonality involves not just a temporal variance, its also a spatial component. The physical factors and climate in the receiving area are the foundations to what they call ‘true tourism seasons’. The temporal distribution of religious, cultural and ethic, social events and activities in a destination are not only influencing the number of visitors, also the characteristics of visitors. To be able to handle the seasonality problem efficiently in a destination it is therefore important to realize where seasonality is generated.
Figure 5 The Mechanism of Seasonality 1 (own build, implemented from Butler and Mao, 1997).
Andriotis (2005), stated that responses to seasonality, by both public and private sectors, focus mainly on two options: the extension of the existing tourist season into shoulder periods and the creation of new seasons with the help of new tourism activities.

The first option can be attained by smartly engineering the product mix. In this regard Language schools need to focus on a wide-ranging strategy. This should be typically directed at the creation of a unique product, based on heavy investment in product features such as technology, infrastructure, buildings, landscaping, and intangibles such as research, customer service, marketing or design image (Andriotis, 2005).

An alternative option is to focus on a small number of market segments. Thus seasonality can reduce by reengineering the customer mix. This can be attained to a very high degree by attracting an innovative market segments (Andriotis, 2005).

Seasonality has prevented the tourism industry being a viable economic activity in many areas. Nowadays destinations are desperately trying to reduce the seasonality effect through different strategies. Despite the fact that the seasonality has created many problems in the tourism industry, there has been relatively little research on this important topic. There is also a problem with defining this phenomenon, why it exists and how to measure it (Kelly, 2001).

It is important to find out if seasonality really is a problem for all the different parties involved in the tourism industry. There are very few studies exploring the positive aspects of the seasonality phenomenon (Baum, Hagen, 2007).
4.2 Island Tourism

According to Chen (2006), islands are privileged with exceptional natural and cultural environments, but also bear many constraints. EU strategists have developed the Island Tourism Multi-Dimensional model (ITMDM). This is part of an EU sponsored Geder project which has been heavily promoted by the Island Commission. This focuses on the development of policies in order to enhance sustainable tourism, focusing on eleven island regions of Europe (Chen, 2006).

Subsequently the overall goal of this EU Island Geder Project is to use the regional know how in order to structure each island region, to be able to provide better information to the insular political and administrative factors. The ITMDM is designed to investigate the evolutional economy and society and this interaction with geography and environment with advance understandings of island tourism dynamics under selected time series factors according to Chen (2006).

Donatos, Zairis (1991) have also been researching in Islands and states they tend to organise diverse tourism-related activities. The climate on the islands and their other natural attractions help give them a competitive edge. The authorities of these island states seek to ensure the attractiveness of these destinations, so that they appeal particularly to tourists. In order to ensure such an objective, they seek to enhance air and sea travel to other countries, neighbouring and distant. Tourism inevitably generates a major impact on the economy, and it is a major source of foreign exchange. Over the past years, empirical evidence highlights clearly that tourism is a major income earner for island states, particularly if they are seeking to become more service orientated. This is very important for economic welfare.

When prospective tourists choose to visit an island destination, their decision is influenced by various factors, which are mainly outside of the control of the island and its stakeholders, both within the administration, as well as within the complex structures of the hospitality industry. Islands are often minute, handicapped by a highly vulnerable natural environment. This means that a great deal of planning must be undertaken to ensure an appropriate development of the hospitality industry, both now and in the future (Hoti, et.al, 2007).
5. Empirics

This chapter includes the Interviews that were carried out. The subheadings states who was interviewed.

5.1 Malta Tourism Authority

The importance of English language learning for the MTA can be assessed in terms of the attention granted to this niche over the last years. The MTA Strategic Plan 2002-2004, emphasises that this institution is seeking to establish the specific requirements essential for the language learning market. The MTA is seeking to ensure that the appropriate marketing tools are employed. It assists the language learning market through support services, and will further encourage language schools and host families to provide an improved service to meet demands.

The MTA, through the establishment of the Human Resources and Support Services Directorate, highlighted the point that service is about delivering value for money. The HR&SS is responsible for training persons already working in the industry, while encouraging the positive prospects of making a career within the tourism sector. Over the years, feedback presented by English Language Schools contributes to the upgrading of training programmes for stakeholders working in the ELL sector. The MTA needs to continue initiatives concerning host families, which play a valuable role in the English Language industry.

The MTA identifies that students visiting the islands during the summer months are there for a shorter period, one to three weeks. During the shoulder months the stays tend to be longer, even over two months in many cases.

This year the MTA is approaching all language schools with a development programme for their leisure staff, with the aim of making their jobs easier. They are hoping for a positive outcome of the courses they are providing for the schools and leisure staff.

Furthermore, EFL Tourism has to develop and all schools have to set standards following the MTA. The MTA requires the following for the development of EFL Tourism in Malta:

- Quality courses and teachers
- Competitive Price
- English Language speaking country
• Variety of things to do (English plus)

• Safety

• Hospitality

• Opportunity to work part-time

• Host Families, self catering accommodation

• Climate

• Beaches

The efforts to encourage students during the shoulder months are geared more towards adults, and work and study visits are to be promoted. Business English is also being developed. This is something they see as a possibility during the shoulder months, and with the right marketing they hope to attract more students. Contacts are always valuable and there is a continuous growth of contacts within educational institutions to market EFL. English-plus courses are also a market they are developing. The summer season occurring from May to September represents the apex of the tourist inflow. However, from October until March, the tourism industry registers its lowest ebb, with the exception of the last weeks of December.

Potential source markets

• Lately the market has grown for Eastern European Countries, and this also applies to China, Japan and South Korea. The South American market is new and in need of development.

• The closest competitors are the UK and Ireland; even Cyprus is becoming a competitor. Destinations in other parts of the world are the United States, New Zealand and Australia, but truly the biggest competition comes from Europe.

The MTA want to highlight the following issues

• Seasonality – peak months of summer have reached saturation

• Clear procedures for the issue of visas

• Attract more host families and improve quality of service provided by host families
• Law enforcement in places of entertainment

• Emphasise values of hospitality and diversity

• Together with relevant stakeholders adopt an innovative approach in developing English-plus courses and study/work offer

• Strengthen position in established markets (Germany, France, Italy, Scandinavia, Austria, Russia, South America, and Middle East)

• Maximise on potential of growing markets (Eastern European, Iberian Peninsula, Korea, China, Japan, and Turkey).

The MTA mentions their survey that they carried out in 2007, which was to look forward towards a possible development for Language Tourism. The categories that were mentioned here were: age, class and the length of stay.

Malta is already attracting the younger market and the younger learners over the summer period. The potential growth for the young learners' market is classed to be medium, but this market is not the main market to be targeted for the shoulder months. There is a potential to target the undergraduate/first job group better. The professional group is classed as between medium and high, and senior citizens are of medium potential.

It is also important that the courses that students want are available. The generic English course was found to be of medium and high potential. All other courses - Business English, Professionals, Exam and University preparations are all found to be of high potential.

To conclude the MTA wanted to highlight;

Student Profile

• Consolidate the senior and the youth market (12 to 17)

• Focus on attracting more children (under 12), undergraduates/first job, and professionals

• Attract undergraduates, professionals, and seniors from both short and long haul markets

• Promote courses for young learners in Western/Central/Eastern European markets
Courses

- Attract students interested in Generic English courses, Business English, Professional in all quarters except Summer
- Potential for growth in Exam/University Preparation course throughout the year
- Combine leisure holidays with English language for Seniors Length of Stay
- Increase length of stay to more than 4 weeks, especially in long-haul regions

‘Focus promotion vis-à-vis short stay trips within European borders’

Also the length of stay has an impact for the schools. The short stay, here classed as maximum one week, has a medium potential growth this also applies to the medium stays of two to three weeks. According to the MTA stays over one month was seen to have a high potential growth.

5.2 Director EL School

Back in the 1960s and 70s, when the language tourism started on Malta, there were only 22 language schools on the island and today the number fluctuates between 40 and 50.

‘All of the schools have a great deal to offer their students’.

Some have more demand than others and larger resources to offer different kinds of lessons, accommodation and leisure programmes to their students. All of these have a great importance in making up the sum total for a student's holiday and learning at the school. The increase in this industry over the years has enabled some schools to develop their own accommodation as well as having their own classrooms rather than renting too many rooms in schools that are closed for the summer holiday. Most of the schools are moving to larger premises. As many schools are expanding they are also building their own accommodation, and this has boosted the industry.

‘The closest competition for Malta is England’

In England you experience the English. What Malta can do to compete is to bring out its own characteristics. People are choosing Malta for different reasons and one of them has been that 'Malta seems to have a unique character and something different'.

30
'Today there is a lot of competition in most markets and it is important to distinguish yourself from the others'.

One way is to have partners in different countries, creating networks. The only way to expand is by making yourself known - by establishing contacts able to market the school in the best way for each country you want to expand to.

'Market the schools for a better image as it is difficult to sell as a whole'.

The image of Malta as a destination is clearly a sun and sea destination, guaranteed sunshine over the summer months. This statement cannot be ignored. Being an island is seen as a positive factor, and also as a safety issue. Accessibility on an island is also easy, as nothing is very far away and all activities can be enjoyed for longer because of the shorter transport time. Of course Malta can be considered small, but there is much to be gained from the closeness of the local population. The possibility of developing a programme of work and study for older students is something we have looked into. This would be a niche market and probably is this the way forward over the shoulder months. Even a development of more specialized courses, moving into different markets and with different needs with this work combination would be something we think well worth trying.

The accessibility of the island is not seen as an issue any more. The increase of tourist activity from all over Europe, with the lower-fare airlines accessing the island, has affected tourism overall very positively. With this expansion the typical, and so often mentioned, issue of seasonality is slowly vanishing. The season is getting longer, and as overall tourism is extending the season, language tourism is hitching a ride on this, as people are discovering the benefits of language learning on the island.
5.3 Interview HR Manager

The first question we talked about was the contribution to Malta’s tourism industry. He commented that the Language industry is one of the main pillars of Malta’s tourism industry. This also contributes close to 10 per cent of tourist arrivals.

It is interesting to take one's viewpoint from actually seeing the demand, and you can see a demand for extending the season. As we experience in the summer, when the programme for both adults and juniors run, and the adult programme runs all year round.

*The peaks and troughs in the industry’s activity remain consistent*.

It is important to understand the development of Language Tourism and what is to come next. The competitors are the UK and USA and Malta will face stiff competition and will struggle to maintain current volumes. This is especially the case if the dollar and sterling currencies remain weak, which basically means that it will be cheaper to take language training in the UK and the US.

The need to develop and extend the season is one issue, but what needs to be done to achieve higher numbers for the low season - what is missing?

*It is probably a question of marketing; do English Language Schools in Malta market their services as being available all year round?*

*Where is the English Language market heading, and what is the situation today?*

The market is still buoyant and with room for growth, so the following are going to be critical in realizing the market’s potential:

- Malta’s image as a safe and a quality destination
- Reasserting English Language Schools’ professional credentials
- Schools ensuring that the products they offer are in line with customers´ expectations
- The overall price is a competitive one and there is perceived price value
- Research and investment in new products
- Less bureaucratic visa regulations for non-EU citizens
The development of language skills is viewed as a critical element of an individual’s development. Since 80 per cent of the Maltese can speak English, several multinational companies have favored Malta for opening businesses. Since the majority of the Maltese can speak a good level of English, it means that the local population is able to integrate themselves into the international community to a much fuller extent.

There is a global demand for English language schools which means they increase from year to year, thus highlighting the importance that several international community’s attribute to the language.

Malta’s geographical location, i.e. a gateway to Africa and Europe, denoted its strategic impact in promoting the island’s development as an international learning centre for the English Language. While the English language industry is one of the main market segments in Malta’s tourism, it does receive a lot of adverse publicity and is deemed to be a low budget segment. While an element of seasonality will always prevail, it is desirable that the business activity is spread throughout the year therefore enables better planning. This in turn delivers quality services which will result in increased investments and appropriate deployment of resources.
5.4 Director of Studies

Over the winter period the schools are receiving the mature students. These students are interested in improving their English, either following completion of their degree or prior to their studies or professional lives. Students that are staying for a longer period over the winter months will be seeking different types of teaching and experience than the summer students. This has of course to do with the length of stay and the purpose of their visit. Students arriving from the Far East; China, South Korea and Japan tend to stay for a minimum of three weeks. Even the Latin American market has increased but the competition is of course from the USA, being geographically closer.

The EL sector is a big contributor to Malta’s economy and this extension of the season is important, as the students are already distinguishing themselves from the normal mass tourists, by spending at a minimum 15 nights, and the tourist can spend as little as one or two nights. In order to overcome this challenge of having a higher number of incoming students over the shoulder months it would be easier if the visa issue disappeared. This applies especially for the Asian market, Turkish, and Latin American, with Columbia as the main market. It is increasingly difficult to come to Malta for a longer period. The students that come over the shoulder months are generally very motivated students. Malta should be seen as a destination for learning business English and for taking more demanding courses, as the courses are available for everything from general English to exam preparation courses lasting for a minimum of 12 weeks. The product has to be varied.

‘The majority of the schools are not operating all year round and this is also a factor that is affecting the opportunity of having a longer season and a more continuous flow of students’.

He continues to mention the summer;

‘The summer has reached it saturation point I think’.

The leisure programme that is available in the summer is of course easier to match with the academic as there are more options, while in winter there are limitations. There is the option of having more cultural activities in the winter, which we do find very important, as experiencing the local culture is part of the whole learning process. What needs to be highlighted is that the programme over the shoulder months/winter is for adults. The product must be geared to suit most students.

‘Malta as a destination is safe and I would say it is an advantage of it being small’.
Transport from the school to the various activities is easier on a small island, including the closeness of the local people makes it easier to feel safe; which we do consider to be an important aspect.

The increase of the low-fare airlines to Malta has of course been of benefit to the general tourism industry for the country, but for the summer saturation point has been reached. With this I mean everything, the quality of services and hotels, these two are highly important factors and with the huge amount of people in the summer all factors affecting a holiday are being affected. To conclude the interview the visa issue was said to be of great importance as this would solve a lot of problems.

5.5 Director/Owner

I am sure that many schools would like to have more students over the shoulder months, the supply is there but I am unsure about the demand apart from the summer schools. The numbers have been increasing over the last years and I do think that they will continue to increase as well. What needs to be available especially over the shoulder/winter months are more professional and attractive programmes for the adults from 25 and over and for executives. Malta is small and friendly, has excellent facilities, a good climate also during the winter, as well as high-quality tuition and teachers, a safe environment and friendly people. I would not consider it being a disadvantage nor an advantage in Malta being an island. It does not make any difference at all. It is however important that the area where the students are studying has the necessary facilities of a good standard.

‘However, Malta being a small island makes it a friendly place where students feel well treated, apart from the point that host families have a positive impact on the students as well’.

The beauty for students from the age of 8 to 18 coming to Malta in the summer, spending part of their summer holiday in a warm country as well as learning the English language is a good experience. But as most of them at this age can only travel during the school holidays and there is nothing that we can do about this.

As I said earlier it is important to attract the older students that can get time off work to be able to study.
6. Results and discussion

This chapter includes a combination of the theories previously mentioned and applies them to Malta, having studied the country in close context.

The previous chapters have covered the importance and the possibilities for a longer season. There is a lot of work that needs to be done and all parties have to contribute if this expansion could become a reality. The MTA is taking this growth of tourism seriously as it is contributing to families’ incomes on the island - those acting as host families, for instance. Each school looks after their own host families but the MTA sets the standards. It also demands an extensive combination of language learning and leisure. The learning market that needs to be targeted in order help this extension is the 25+, due to the relevance of summer holidays for the younger ones. So the learning market can be expanded; it all comes down to resources for each school.

‘There is no need for Malta to develop anything for the summer period as this season is already an issue, it is overcrowded. Malta has reached its saturation point, for the summer months’ (Director of Studies, Interview).

There is however a change in language tourism according to the Director (Interview); ‘...a few years ago we used to be busy up to end of August but the season has by itself been extended to October’.

The seasonality issue has shaped the Maltese tourism industry particularly over the past decades. This characteristic is typical of many alternative and competing Mediterranean destinations. The tourism industry is of great importance to Malta over the summer months. Kelly (2001) has pointed out that seasonality has prevented the tourism industry of being a viable economic activity, and destinations are desperately trying to reduce the seasonality effect through different strategies. According to the Director of Studies many schools are not operating all year round, and the HR Manager commented that it is desirable that businesses spread their marketing activities throughout the year. These are important factors in making Language Tourism possible as an all year round industry.

It is clear that the climate is a factor that influences people to visit the island for the summer months, but the warm climate nowadays stretches into the autumn. In the interview with the Director it emerged that a development plan of more specialized courses would be of help and might attract more mature students (as younger students are at school). The option of a work
and study programme could also be developed as a way attracting more students. All the other respondents agreed that the market that needs to be targeted harder is the 25+ as they are more available for travelling. The courses are there, says the Director of Studies, ‘we need to solve the visa issue, for non-Europeans, especially for student’s from Asian countries’.

One other form of extending the season is by having partners marketing the schools in different countries. This has increased the number over the last years a little, the Director mentions. However, the number still needs to increase. As Malta is in the middle of the Mediterranean Sea the island is suffering from the accessibility issue as mentioned by Andriotis (2005). It is possible to travel from Sicily by ferry between 1½ and 3 hours. Accessibility has been mentioned both by the MTA and the Director, and all agreed that the increase of flights from Europe has been a great help.

Andriotis (2005) mentioned the pollution that is caused by ferries and aeroplanes. Islands are also considered to have a very fragile environment and ecosystem, which raises important considerations. The increase of air traffic to Malta including the Sicily ferries are both contributing to the pollution. All pollution from ferries and aircraft can have negative effects on the ecosystem and environment on the island.

Many destinations in Europe do not enjoy another form of tourism as Malta does. The importance of this broad industry for the country is vital, and as Andriotis (2005) also mentions, it is the way that seasonality affects destinations economically, and how to overcome this, that is still not clear.

Andriotis (2005) and Baum and Hagen (2007) highlight that island destinations tend to suffer most by seasonal tourism. After studying the case of Malta, criteria such as access to the capital city, employment and the over use of the facilities are all seen to be relevant to Malta over the summer period. Malta being an island state is the first consideration, and that it is small. The last mentioned is during the summer months an issue as the island gets overcrowded at this time. Staffs are employed for the summer months, and following the peak season they are forced to leave, as there is not enough work. The over use of the facilities over the summer months are also an issue for Malta, and all these problems stem from the country being an island. Due to the mass of tourists on the island over the summer, together with the language tourists, the area containing the majority of the restaurants and clubs and bars is more than overcrowded, and this does not make a good impression on a first-time visitor to the island.
The increase of tourists from the shoulder months to the summer season overwhelms the public transport system as well as restaurants and shops. The season is, according to the Director (Interview 080510), getting longer. The normal season used to stretch to end of August; however nowadays there are still movements until September/October. The gap is still there, but has been postponed. Of course this is seen as positive, but there is room for development. Both respondents agree that the development of a varied programme with quality courses, and extensive courses such as business courses would be profitable; they have to enter a niche market in order to develop.

Regarding the competition from countries with the same climate, the MTA (Interview), was alone in mentioning Cyprus as a competitor. Cyprus is a close competitor due to its location in the Mediterranean and its similar climate. However, the greatest competitor is still England. The biggest difference between the two countries is that England does not face the seasonality issue as Malta does. The climate has been spoken about as being a major attraction for Malta. This factor is a determining factor for the seasonality issue, and cannot unfortunately be controlled (Andriotis, 2005).

Factors that were also commented on by the MTA and the Director (Interview) were accessibility and dependence on the tour operators. This issue as a combined one seems to have solved itself due to the increase of low-fare airlines routes to/via Malta. There is not a need any more to rely on the tour operators.

In order to be able to use language tourism as a way to extend the season, the public sector has to be of assistance, in this case the MTA/MTAC. Andriotis (2005) opinion in regards to the responses to seasonality are that it is mainly focusing on two options one being the extension of the existing season into shoulder periods or creation of tourism activities. The language schools have the sources to extend tourism activities and create new ones as well. All respondents agreed to an extensive and worthwhile leisure offer to keep students occupied in their free time - which also brings down the barrier of speaking English in everyday life.

Andriotis (2005) brings up the issue of market segments and the importance of focusing on a small number of segments, which all respondents found to be of great importance. The schools on the island have a wide range of suppliers over the summer months and their network on the island is also growing, as this industry is considered to be in important source for the island. The respondents have agreed on the importance of targeting the more mature students as they are more flexible to move over the year, due to studies at university and
working life. They can also stay for a longer period of time and the development of a study-work programme could be a very positive forward development.

Being an island destination is both positive and negative for Malta. The accessibility issue is being solved with the increase of the airlines accessing the island. The safety aspect, important for some destinations, is not much of an issue here, due to Malta being small. There is a worldwide trend towards a different type of tourism. Though sea, sand and sea remain attractive, tourists now increasingly look for cultural experiences during more frequent but shorter holidays. They are leaving seaside establishments and heading inland to see authentic local culture (Chen, 2006, Director of Studies, Director, Interviews).
7. Conclusion

Taking a final look at this issue of Malta, its extensive Language tourism and the issue of seasonality, as well as discovering a wide range of facts together with theories, there is a way forward for this industry on the island.

A wide range of issues have been covered in order to give the best possible perspective on this small island state and its tourism industry together with language tourism as a niche market.

The MTA has been covered and they play an important role for the schools' further development. If their relationship with the schools is working, a clear development can be made. There are issues that the schools can deal with, such as their suppliers. All schools are themselves doing their utmost to develop a stable and good relationship with their suppliers, and this way they are also giving each other good business - and once the number of students over the shoulder months begins to rise, the suppliers will take advantage of this increase as well as the schools.

Malta cannot, to any significant extent compete with its closest competitor in Europe, England. This is mainly focused on some of the extensive courses that are offered, but as the MTA is aware of this situation as well as the schools a development in this matter is highly prioritised. The qualities of the teachers and courses have to be to the same standard as in England if they are to compete. Malta has its own characteristics that are attracting tourists, i.e. the warm climate over the summer, but also a warmer spring with a pleasant climate that is an attraction of its own.

The option of the development of a work and study programme that would be more targeted towards older students, and for the shoulder months, is in our eyes seen to be a perfect solution. Another option we have seen is the development of the courses. Many students studying English have a major purpose for their learning: this can be for work or having the pressure of gaining a language certificate to enter university in an English-speaking country. These qualifications are few in Malta, and as seen in the statistics for the summer months raising the number of students gaining a qualification during their stay would be a good result for all concerned. There is clearly a market for the more mature students (who mostly arrive when the hectic season is over, as the Director of Studies mentioned). Such students, however, are very academically demanding and are working hard, for example, to take one of the English examinations.
An interesting direction for further development and research in this subject might be to make an extensive study of the students visiting the island, presenting the work and study option to them and discovering the type of businesses that are needed. The major issue of seasonality will always exist; the mass tourism makes this very obvious. Because Malta is a major European tourist destination the seasonality factor is very pronounced, but there are still tourists interested in coming to the island during the shoulder months, just not as many as in the summer. All parties need to work together so that this push in the right direction can be on its way.

So is the issue of seasonality really a serious problem for all the different parties involved, and those who participated in our case studies? When carrying out our observations and surveys on Malta and its different parties we have recognised it is an issue that needs to be taken care of.

During our work we have noticed one important issue. The destination is competing with other destinations such as England and the US, but also Australia. England is seen as the biggest EL competitor to Malta. Malta is using its resources to attract students to the island with its culture and great service quality. This is not always enough to attract new students who wish to study a language.

A solution for Malta could be to put more money into marketing. Let people all over the world know that you can study English in Malta. It is very important for the schools on the island to have a good marketing plan.

Furthermore it is also important to focus on the issue of transportation to and from the island. Low-fare airlines fly regularly to and from the island. This gives an opportunity for more people to visit the island and also for students to study there. Students don’t have a lot of money, so for them it is important that they travel at a low cost.

The way forward for Malta in this matter is to use all its resources to develop a national plan focused on the EL sector and to promote the assets that are highly rated and that can be used in combination all year round to help generate an all-year-round tourism.

The tourism industry in Malta is a base for Language tourism. If the main tourism market is working well, the smaller dependent markets can make use of this and grow, and with solid cooperation from all, development will take a good step in the right direction. It was also highlighted by Kelly (2001) that many destinations are trying to find different strategies to
reduce the seasonality tendency. In this matter it is clearly the case that Malta has many advantages. To conclude this research and dissertation the following question have risen, this can be development of further studies;

Are all the stakeholders in Malta making the best use of all possible resources to achieve year-round tourism?
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8.3 Interview

Director; 080510

Director of Studies; 080829

Human Resource Manager; 080826

Malta Tourism Authority; 080430

Owner/Director; 080827
Appendix I

Interview
Language tourism’s contribution to Malta’s tourism industry

Is there a demand for extending the season?

Language tourism development and what is to be expected

Where is the EL Market today in Malta today and where is it heading?

From a development point of view what needs to be done to have a higher number for the low season? What is 'missing'?

Language learning in Malta, why Malta?

Importance of English and English as a global language

A general point of view of the EL sector in Malta today

Malta as a centre for learning/teaching

Do you consider it being a negative/positive aspect of Malta being an island state and is this a positive aspect for the English Language Market?

What is your opinion on the seasonality issue?
Appendix II

Abbreviations

ADT     Malta Transport Authority [Awtorita Dwar it-Trasport]
EFL     English as a Foreign Language
EL      English Language
ELL     English Language Learning
FELTOM  Federation of English Language Teaching Organizations of Malta
MTA     Malta Tourism Authority
MTAC    Ministry of Tourism and Culture
NSO     National Statistics Office
NTO     National Tourist Organisation
MJHA    Ministry for Justice and Home Affairs
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