VALLETTA 2018
EUROPEAN CAPITAL OF CULTURE

THEME 4
THE TOURIST EXPERIENCE

EVALUATION & MONITORING
Research Findings 2016

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INTRODUCTORY NOTE

The Valletta 2018 Evaluation & Monitoring process is a means through which the Valletta 2018 Foundation gains a deeper insight into the various impacts of the European Capital of Culture (ECoC) title on different spheres of cultural, social and economic life. The goal of this process is twofold (i) To understand the changes brought about by the ECoC title, and (ii) To address any shortcomings and challenges faced by the Valletta 2018 Cultural Programme throughout its implementation.

This process comprises a series of longitudinal studies commencing in January 2015, three full years before the European Capital of Culture year, and running through the ECoC, with results preented in 2019, thereby capturing data before, during, and in the immediate aftermath of Valletta holding the ECoC title.

This process is divided into five themes:

1. **Cultural & Territorial Vibrancy**
2. **Governance & Finance**
3. **Community Inclusion & Space**
4. **The Tourist Experience**
5. **The Valletta Brand**

This research is a collaborative, mixed-methods process, involving a number of public entities, collecting and analysing data primarily of a quantitative nature, together with independent researchers working with data that is predominantly qualitative. These entities and researchers constitute the Valletta 2018 Evaluation & Monitoring Steering Committee, that was set up to manage and implement this research process.

The public entities forming part of the Steering Committee are:

- National Statistics Office
- Malta Tourism Authority
- Jobsplus
- Economic Policy Department within the Ministry of Finance

The independent researchers participating within this process were selected according to their area of expertise. The areas covered are:

- Cultural Programme
- Branding
- Sociology
- Built Environment
- European Identity

Although each of these researchers, and their respective teams, are carrying out data collection and analysis specifically within their respective fields, various points of intersection and collaboration across the various areas have been established so far. The data being collected throughout each study is being shared with the Steering Committee in order to create synergies between the different fields being analysed.

The research methods adopted throughout the various studies that comprise this process vary greatly, ranging from quantitative surveys to in-depth interviews, focus groups and real-time experience tracking.

THE TOURIST EXPERIENCE
THEME 4

The impact of the European Capital of Culture title on the tourism industry cannot be understated. Although the title itself does not directly count an increase in tourism as its primary goal, this has often proven to be a strong secondary effect of the title in previous European Capitals of Culture. Various evaluation studies have shown that the ECOC title can have a significant short and long-term impact on incoming tourism .

This theme looks into the impact of Valletta 2018 on incoming tourism, seeking to understand the degree to which the European Capital of Culture title is affecting visitors' decision to visit Malta, as well as the extent of their participation in Valletta 2018-related activities and events once they are in Malta. This report consists of two studies carried out by the Malta Tourism Authority, namely the Locality Survey and Market Profile Survey.

The Locality Survey explores the ways in which tourists staying in different localities across Malta experience and participate in cultural activity, with a particular eye on those who choose to stay in Valletta during their trip to Malta. The Market Profile Survey, on the other hand, seeks to gain a deeper understanding of visitors to Malta and their primary motivations for visiting.

LOCALITY SURVEY

MALTA TOURISM AUTHORITY RESEARCH UNIT

Tania Sultana with **Mariella Attard** and **Ramona Saliba**

ABSTRACT

The Locality Survey is a research exercise carried out by the Malta Tourism Authority with the objective of gauging tourist experience in designated tourist localities. For the objectives of the Valletta 2018 Evaluation and Monitoring process, this survey will shed light on tourists' experience of Valletta, and more specifically their evaluation of the product and service offer.

Research findings indicate a positive tourist experience, with high satisfaction ratings being recorded across most aspects of Valletta's product and service offer. Valletta's rich cultural heritage was highly appreciated by visitors as well as the city's vantage points and panoramic views.

Areas for improvement mainly relate to infrastructure, basic amenities and upkeep. Lower satisfaction levels were recorded for parking facilities and traffic management, road signage, infrastructure for pedestrians, and public conveniences. The public transport and the service provided at museums and historical sites were also negatively rated.

All in all, tourists felt welcome in Valletta and thoroughly enjoyed their visit, and would consequently be very willing to recommend Valletta to family and friends.

An increase in awareness levels of Valletta's title as an ECOC in 2018 among respondents prior to their departure has been noted whereby the share of tourists being aware of ECOC title prior to their trip to Malta increased from 23% in 2015 to 28% in 2016.

Keywords: Tourist experience, Satisfaction Ratings, ECoC awareness

INTRODUCTION

The Locality Survey is a continuous research exercise carried out by the Research Unit, operating within the Malta Tourism Authority. The study concentrates on Malta's main heritage localities (Valletta, Mdina, Birgu) and coastal localities (Sliema, St Julians, St Paul's Bay/Bugibba/Qawra, Mellieha).

It seeks to gauge tourist experience in these localities, and more specifically tourists' evaluation of the physical product and service offer. The insights enable the Malta Tourism Authority to set priorities in its tourism product development strategy.

METHODOLOGY

The Locality Survey is a voluntary postal survey that is distributed to tourists of any nationality who are residing or visiting the identified heritage and coastal localities. Tourists are approached in the streets and are requested to complete the questionnaire at their convenience. Once completed, the questionnaire is returned to the Research Unit by pre-paid post. The questionnaire is available in 4 language versions – English, Italian, French, and German. Distribution occurs on three work shifts a month per locality throughout the whole year.

The questionnaire has been re-designed to meet specific research objectives of the Evaluation and Monitoring Committee: locality-specific questions relating to visits to cultural sites and attractions, participation on cultural events, and questions relating to Valletta 2018 ECoC awareness have been introduced. Following these adaptations, the survey was re-launched in February 2015.

Relevance to Valletta 2018 Evaluation & Monitoring Objectives
In relation to the objectives of the Evaluation and Monitoring process, this research project will:

- Enable the profiling of tourists visiting Valletta and more specifically of tourists opting to reside in Valletta during their trip to Malta.

- Provide tourists' evaluation of the product and service offer in Valletta, namely satisfaction levels relating to accommodation, restaurants, cultural and historic attractions, entertainment, shopping, tourist information, urban environment and amenities.

- Provide an assessment of tourists' overall experience in Valletta, and their perceptions of the capital.

- Enable the monitoring of levels of cultural participation, in terms of visits to cultural sites and attractions in Valletta, and attendance to cultural events and activities.

- Give insight into tourists' awareness of Valletta as European Capital of Culture - both "pre-trip" and "during trip" awareness – and whether Valletta 2018 has an impact on trip motivations.

Research Limitations

The Locality Survey is funded by the Malta Tourism Authority's budget allocation for market research, and the continuity of this study is reliant on the provision of such funds. The continuity of this project also depends on the research priorities of the Malta Tourism Authority, which may be subject to change during the timeframes of the Valletta 2018 Evaluation and Monitoring Project (2015 – 2019).

The Research Unit's data collection is currently outsourced to a contractor on the basis of a call for tenders. In relation to this, uninterrupted data collection hinges on the availability of data collection personnel and the ability of the contractor to meet the tender requirements set by the Research Unit.
The findings presented hereunder are based on data collected during the period of January to September 2016. A sample of 305 respondents participated in the Valletta-specific Locality Survey within this timeframe.

FINDINGS

Socio-Demographic Profile

Tourists participating in the Valletta-specific Locality Survey mainly came from the UK and Ireland (51.5%), Germany (16.8%), France (12.5%) and Italy (4.6%). The large majority were female respondents, with a share of 57.6% compared to 42.4% male respondents. They had an average age of 53 years, with 54.4% of respondents falling within the age bracket 55 and over.

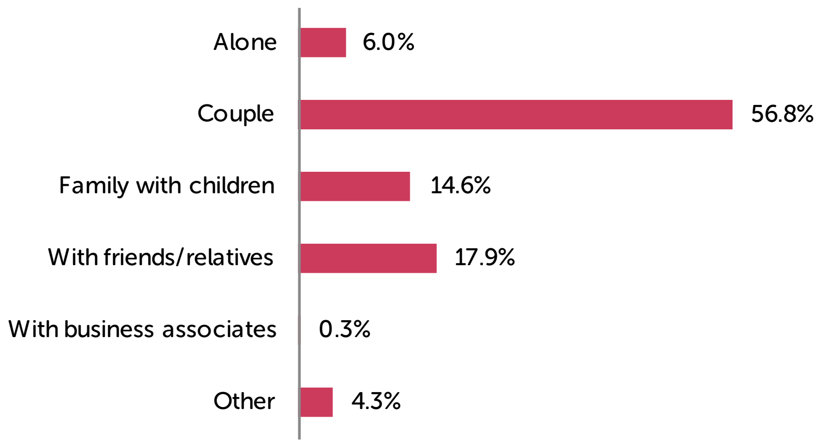
Table 1: Country of Origin and Age

Top Countries of Residence	
UK and Ireland	51.5%
Germany	16.8%
France	12.5%
Italy	4.6%
Australia	3 %
Eastern European Countries	1.9%
Nordic Countries	1.9%
Switzerland	1.3%
USA & Canada	1.3%
Austria	1.3%

Age	
Under 19 years	3.7%
19 – 24 years	3.7%
25 – 34 years	8 %
35 – 44 years	12.5%
45 – 54 years	17.7%
55 – 64 years	29.9%
65 years and over	24.5%

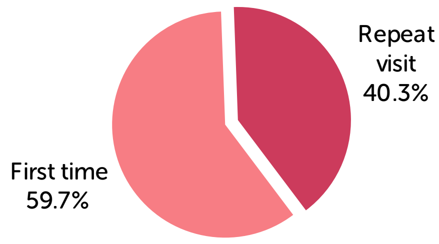
Over half of respondents were visiting Malta with their partner (56.8%). A further 17.9% made the trip with friends and/or relatives and 14.6% were travelling as a family with children.

Figure 1: Travelling Party



Nearly three in every five survey participants were visiting Malta for the first time. The remaining 40.3% were repeat visitors.

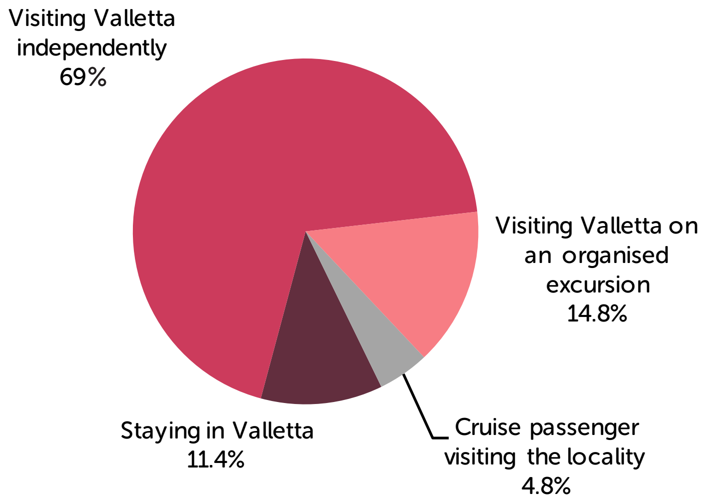
Figure 2: Visits to Malta



Type of Visit to Valletta

Most of the respondents were visiting Valletta independently (69 %). A further 14.8% were visiting the capital on an organised excursion and 11.4% were residing in Valletta for the duration of their stay in Malta. The remaining share of 4.8% was represented by cruise passengers who were on a day trip to Valletta.

Figure 2: Type of visit to Valletta

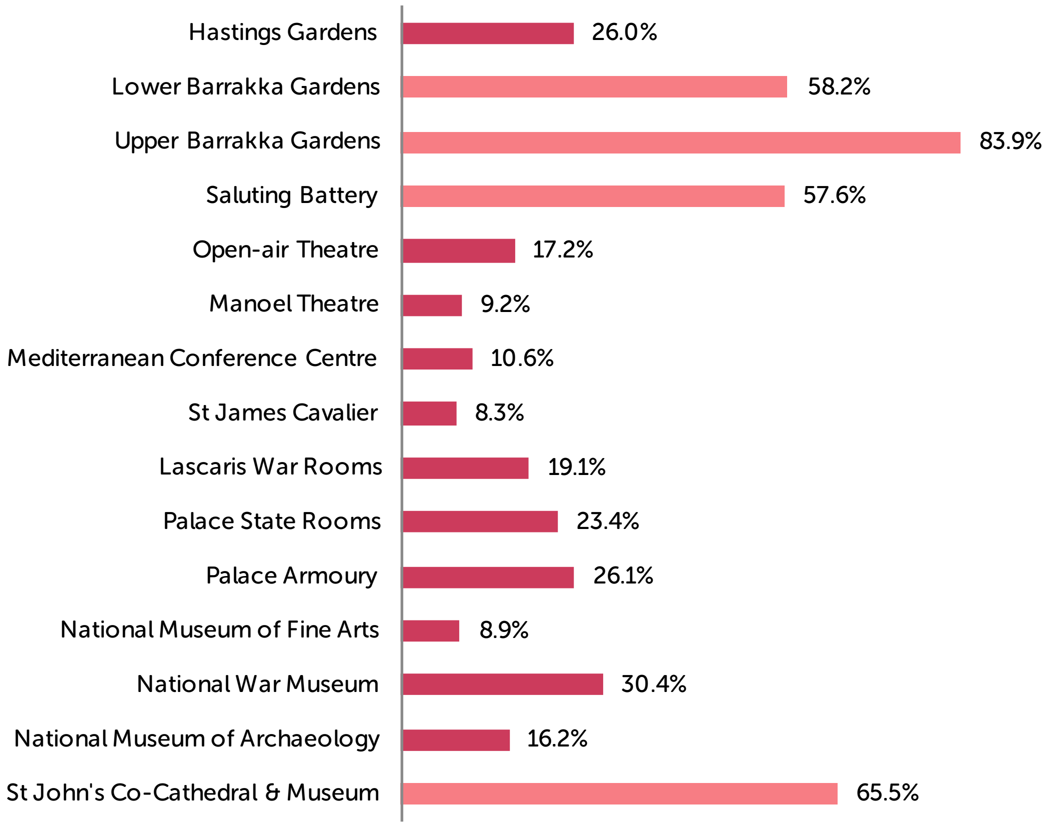


Cultural Participation

To assess the level of cultural participation amongst tourists, survey respondents were requested to identify the sites and attractions they visited whilst in Valletta.

Similar to last year, survey results for 2016 indicate that the public gardens within Valletta were the most popular outdoor attractions: the most frequented being the Upper Barrakka Gardens (83.9%), followed by the Lower Barrakka Gardens (58.2%), and Hastings Gardens ranking third (26 %). St John's Co-Cathedral and the Saluting Battery topped the list of historic attractions, with 65.5% and 57.6% of respondents visiting these historic attractions respectively. It was followed by the National War Museum (30.4%), the Palace Armoury (26.1%), and the Palace State Rooms (23.4%).

Figure 4: Sites & attractions visited in Valletta



Respondents were also invited to mention any events or activities that they attended. A small number of respondents mentioned specific events, namely the yearly Carnival celebrations, the International Baroque and the Malta Jazz Festival which are held annually each year in Valletta and the Valletta Market.

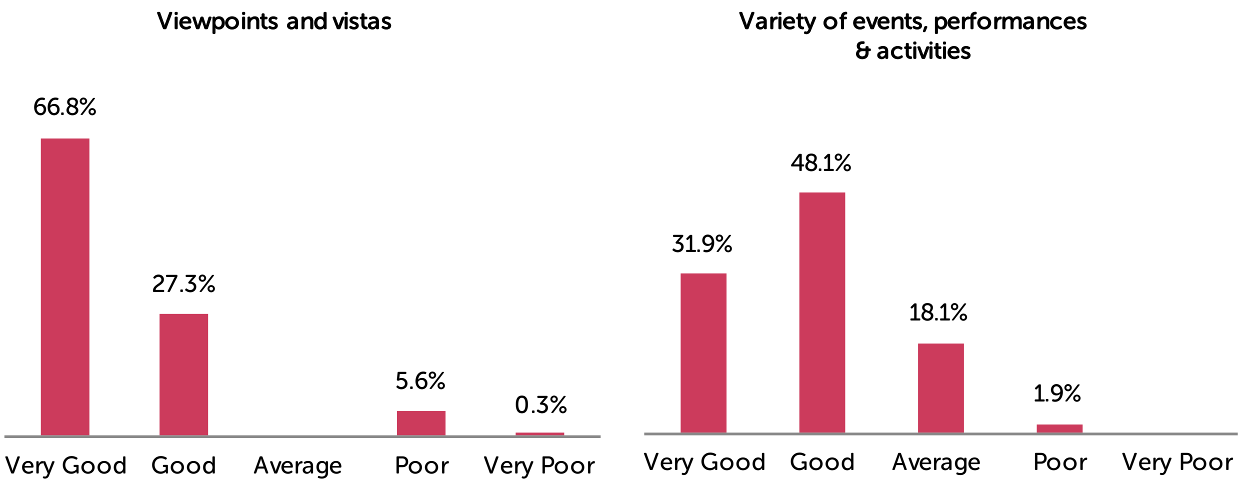
Figure 5: Evaluation of Cultural/Historic Attractions in Valletta

Respondents who visited cultural and historic attractions in Valletta were highly satisfied with the variety available, with the overwhelming majority attributing an above average rating (96.9%).

In terms of the presentation and valorisation of cultural and historic sites, satisfaction levels were also high albeit to a lesser extent (86.5%).

Quality of service offered at these sites was generally rated as 'good' (50.6%) or 'very good' (37.8%). In comparison, value for money (72.5%) and opening hours of sites (72 %) were less positively rated.

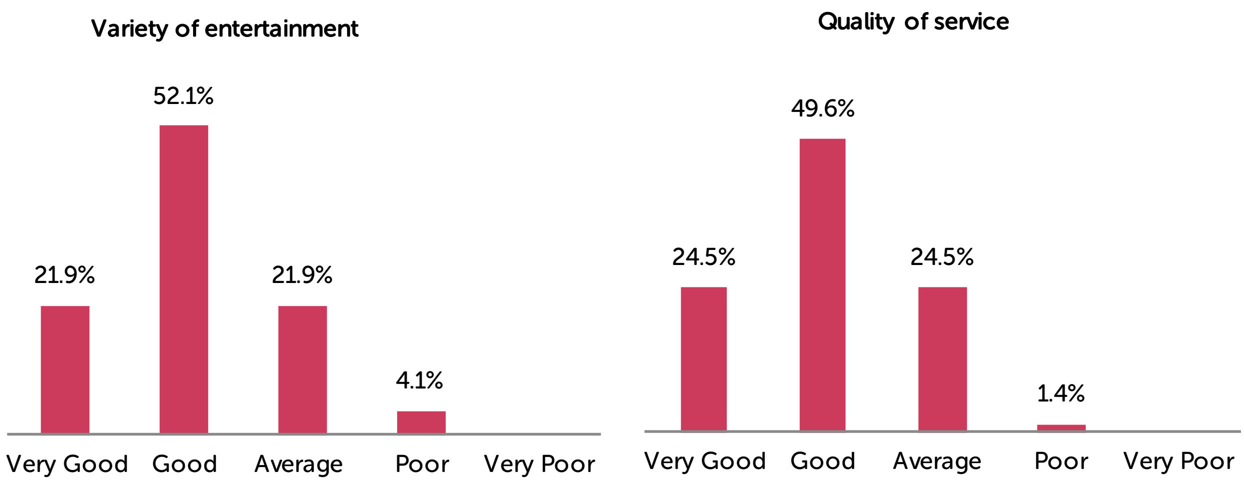
Figure 5 (continued): Evaluation of Cultural/Historic Attractions in Valletta



Four in five respondents expressed satisfaction in terms of the variety of events, performances and activities they attended in Valletta.

The capital's viewpoints and vistas were the most positively rated aspect in Valletta, with 94.1% of respondents attributing an above average rating.

Figure 6: Evaluation of Entertainment in Malta



Relating to the entertainment offer in Valletta, the majority of respondents expressed satisfaction with the variety and the quality of service offered.

In contrast, nearly three out of ten respondents considered value for money for entertainment to be average or below.

Figure 6 (continued): Evaluation of Entertainment in Malta

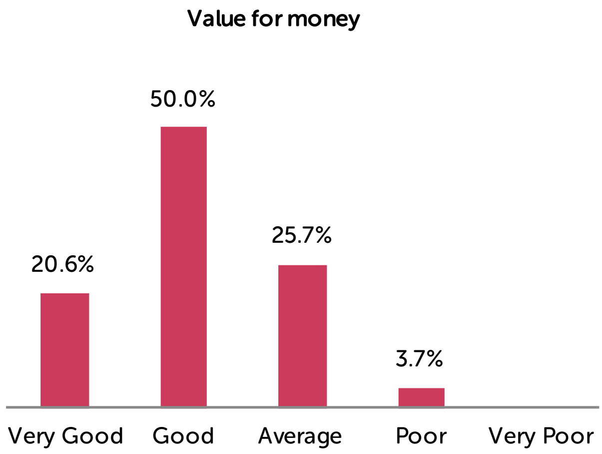
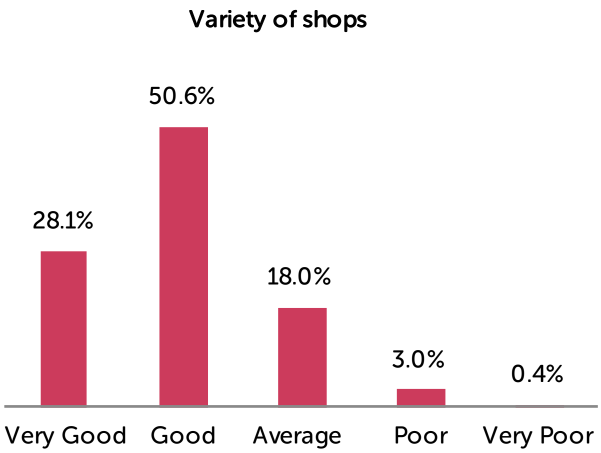
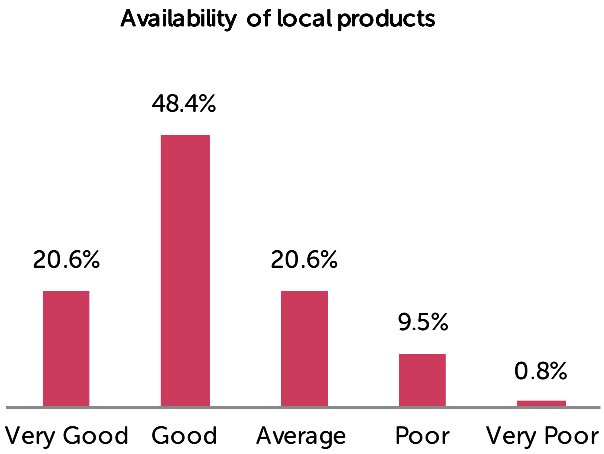


Figure 7: Evaluation of Retail Offer in Valletta



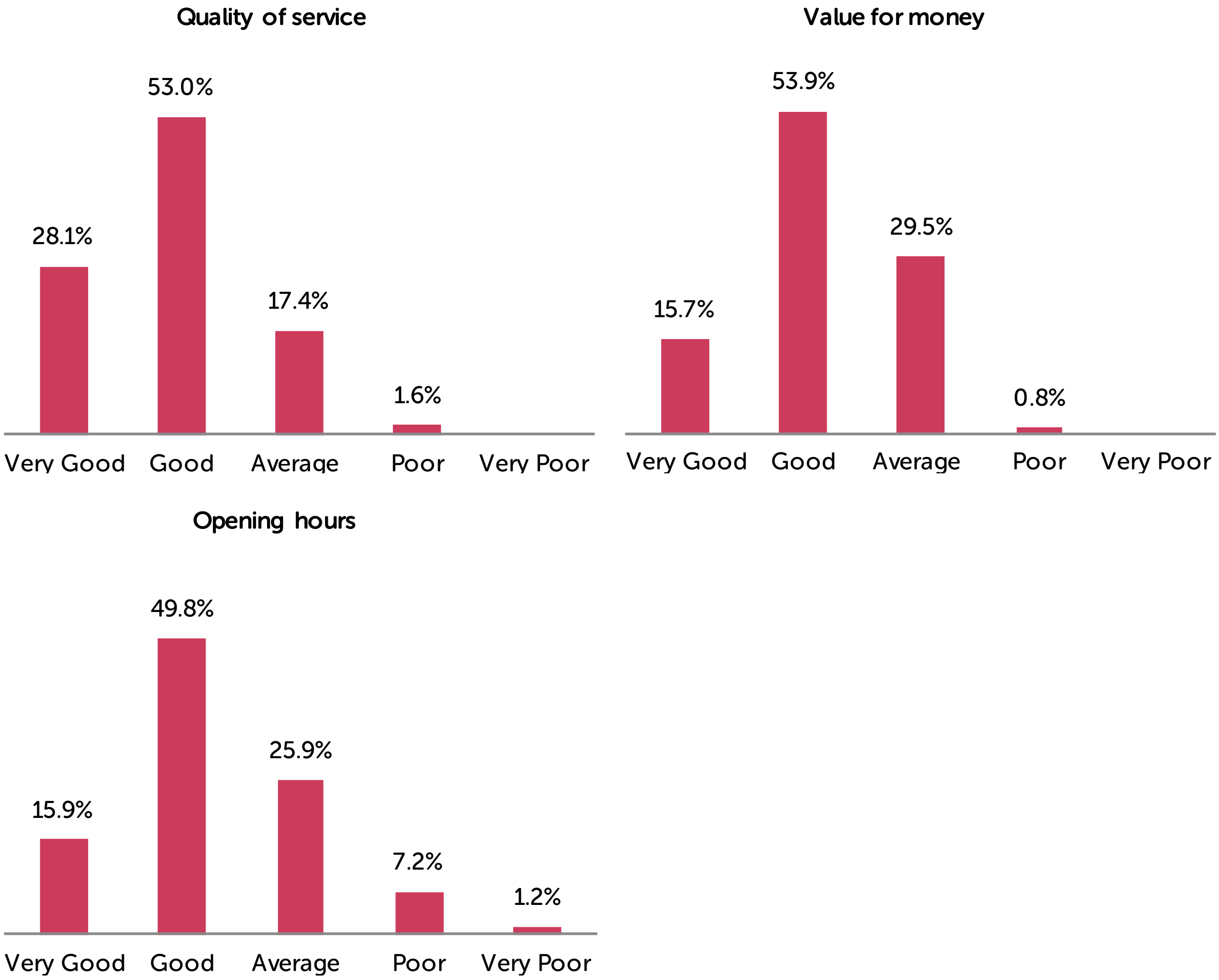


Nearly four in five respondents rated the variety of retail outlets as above average.

Specifically on the availability of local products in shops, however, satisfaction ratings were lower; where three in ten respondents attributed an average or below average rating.

The quality of local products (51.5%) was deemed to be generally good by most survey participants. The majority of respondents were pleased with the quality of service received at the shops. On the other hand, value for money and to a lesser extent shop opening hours were rated less favourably.

Figure 7 (continued): Evaluation of Retail Offer in Valletta



Evaluation of Restaurant Offer in Valletta

Tourists expressed high satisfaction levels in terms of the choice of restaurants available in Valletta, with

Figure 8: Evaluation of Restaurant Offer in Valletta

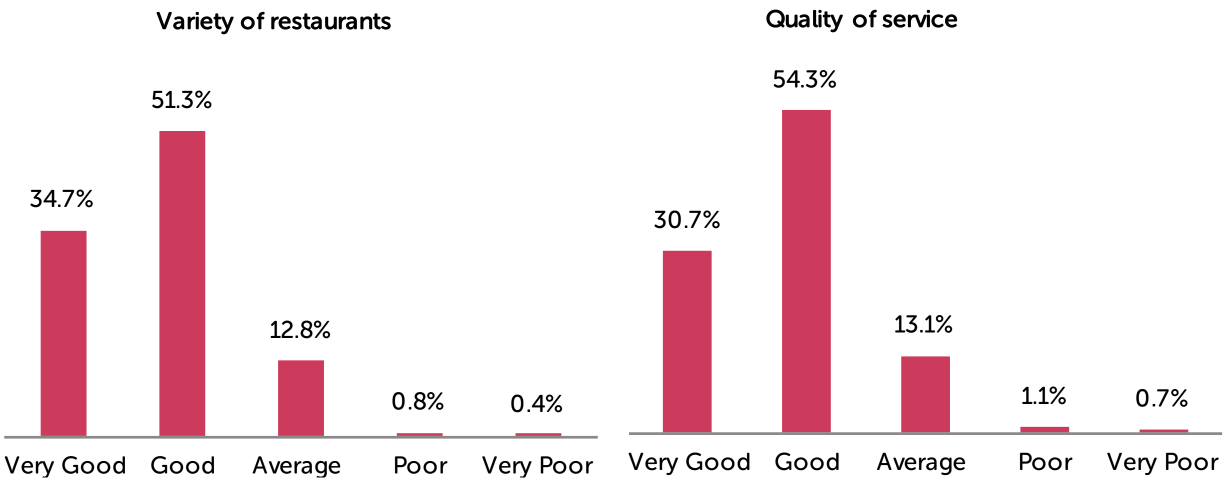
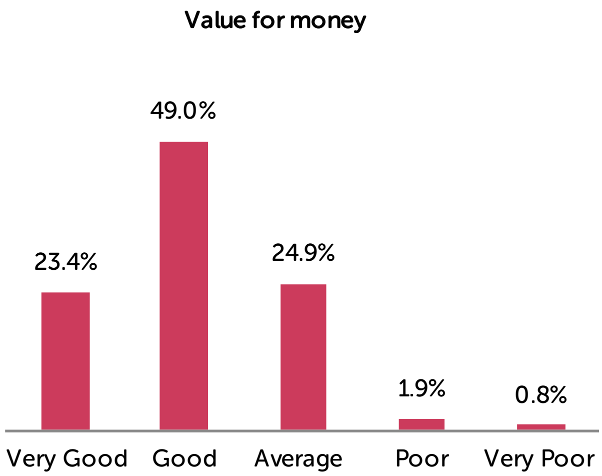


Figure 8 (continued): Evaluation of Restaurant Offer in Valletta



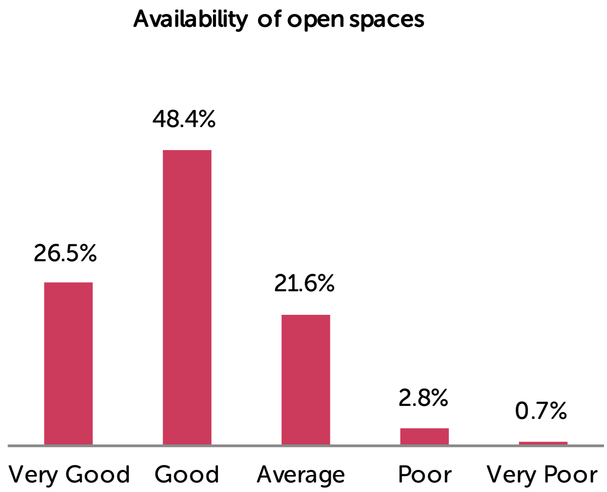
over 85% attributing above average ratings.

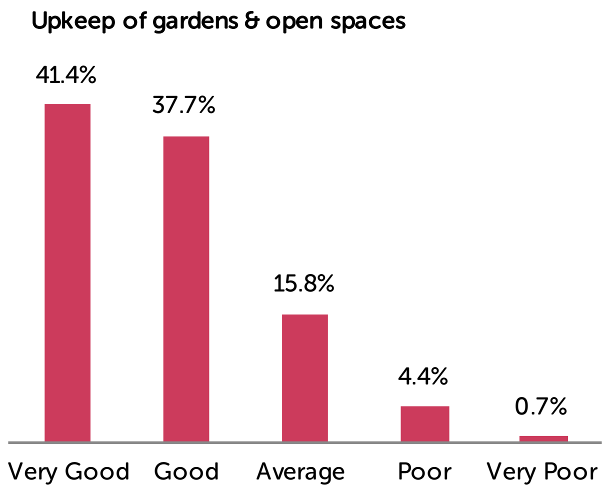
Favourable satisfaction levels were also achieved in terms of the quality of service in restaurants. Nonetheless, slightly more than one fourth of respondents attributed average or below average rating for value of money in restaurants.

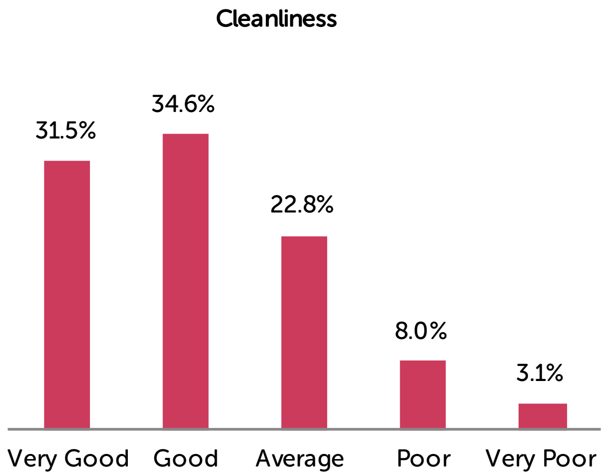
Evaluation of Urban Environment & Amenities in Valletta

Most respondents rated the upkeep of gardens and open spaces in Valletta positively. More specifically

Figure 9: Evaluation of Urban Environment & Amenities in Valletta



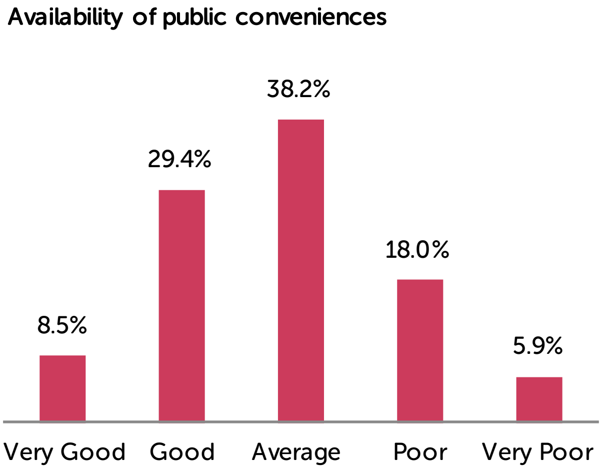


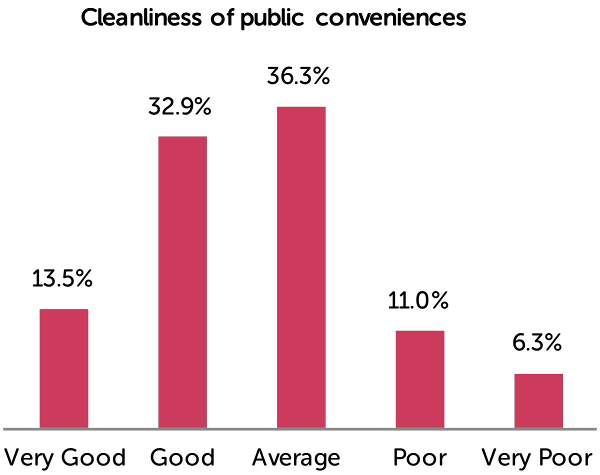


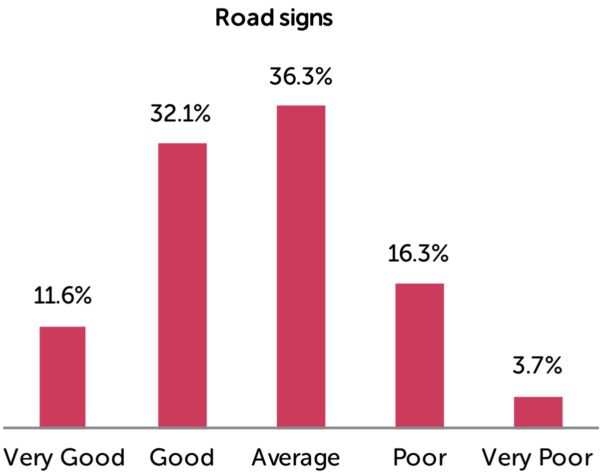
with regard to the availability of open spaces, feedback was largely positive although to a lesser extent; with a quarter of respondents attributing an average or below average rating.

Similarly, the larger share of respondents rated Valletta's overall cleanliness favourably. However the share of respondents rating cleanliness as 'very good' or 'good' declined from 74.3% in 2015 to 66.1% in 2016. Lower satisfaction levels were also recorded for public conveniences, particularly in terms of availability, with 62.1% attributing 'average' to 'very poor' ratings. Cleanliness of public conveniences was also deemed as mediocre by more than half of respondents.

Figure 9 (continued): Evaluation of Urban Environment & Amenities in Valletta







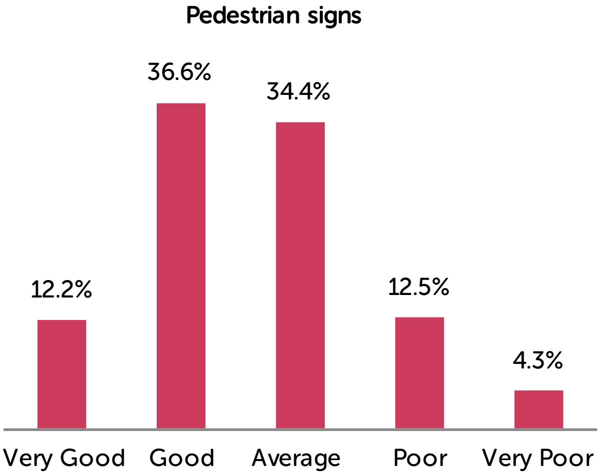
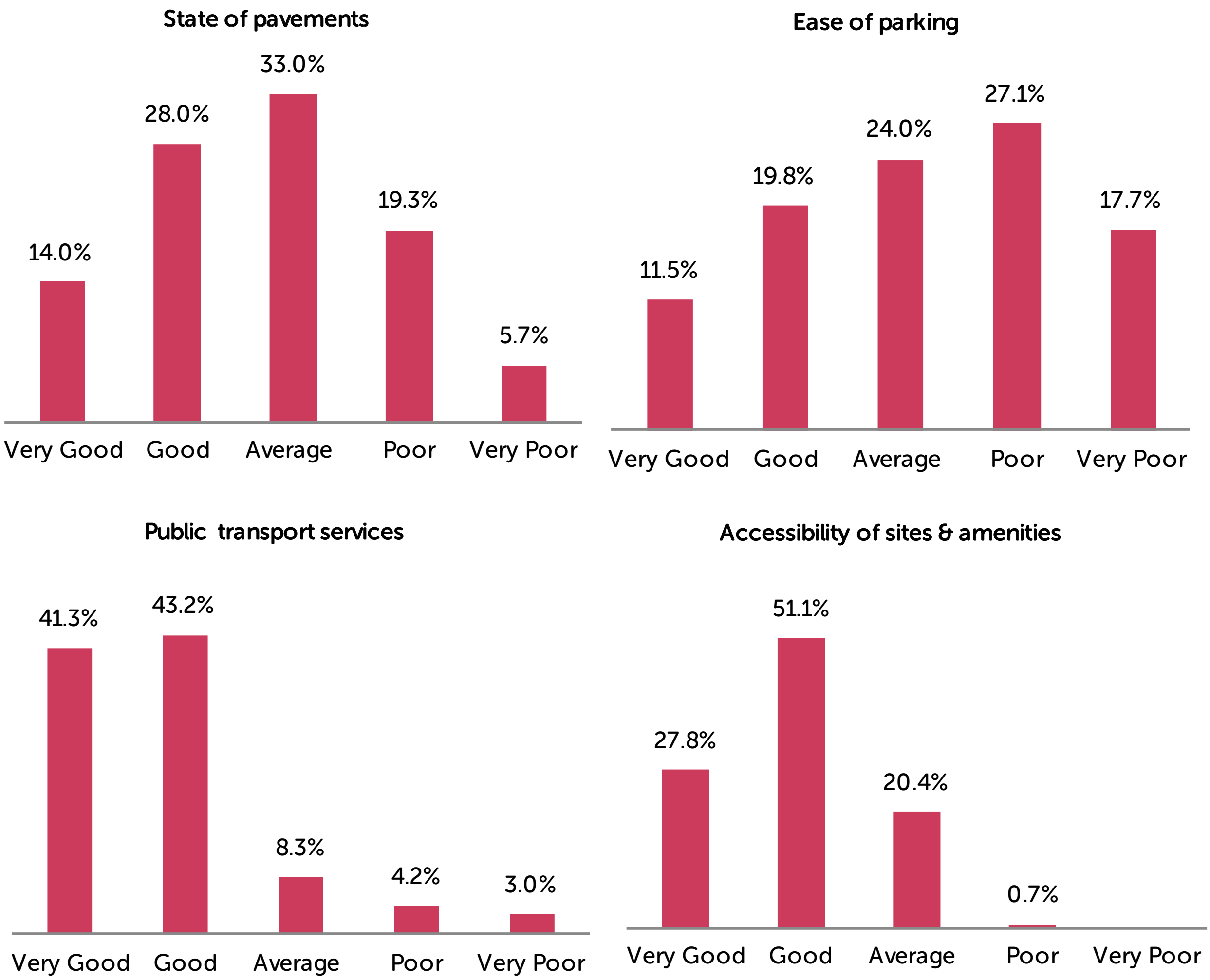


Figure 9 (continued): Evaluation of Urban Environment & Amenities in Valletta



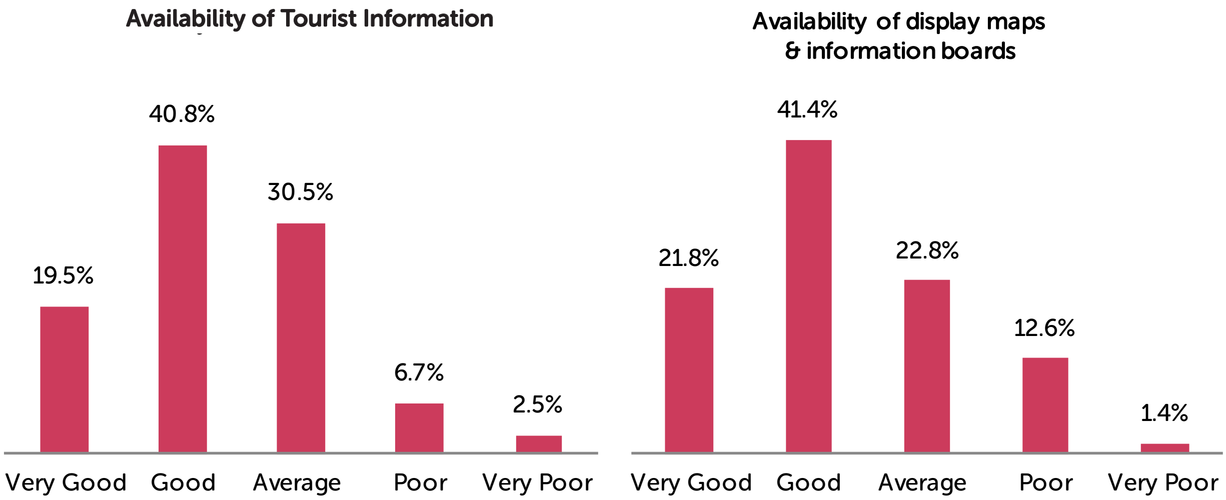
Various aspects of infrastructure in Valletta were deemed to be relatively mediocre by visitors participating in the survey.

Pavements, in particular, were rated as average or below by nearly three out of five respondents. Similarly, pedestrian and road signage were rated as average or below average by over half of respondents.

Respondents making use of a vehicle during their stay expressed dissatisfaction with the parking facilities in Valletta, with nearly seven out of ten encountering difficulties to find parking within Valletta. On the other hand, tourists making use of public transport were mostly satisfied with the service provided to and from Valletta; 84.5% of respondents rated the public transport as either 'very good' or 'good'.

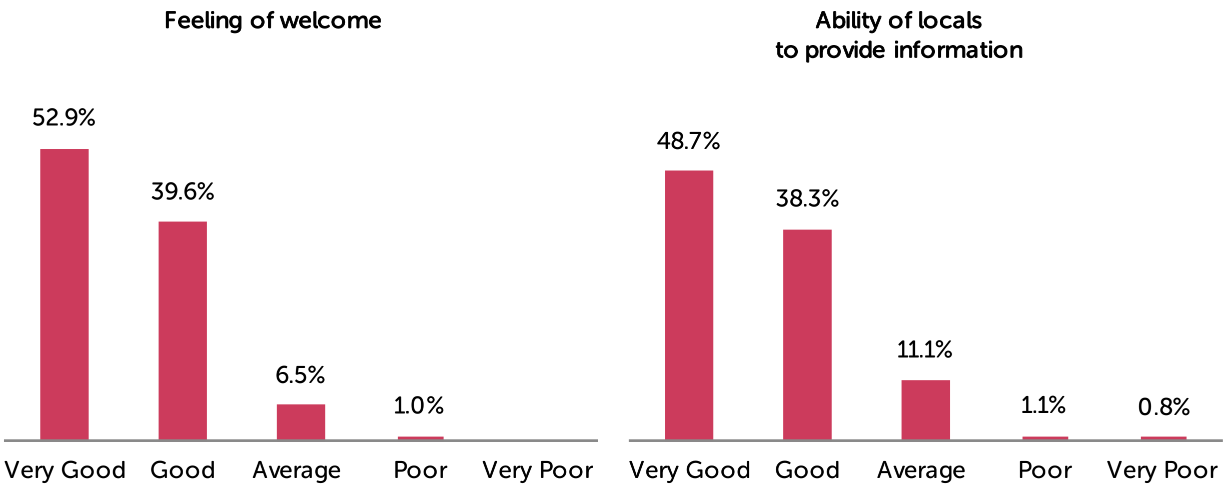
Sites and amenities in Valletta were considered to be easily accessible by most respondents, with 78.9% attributing an above average rating.

Figure 10: Evaluation of Tourist Information in Valletta



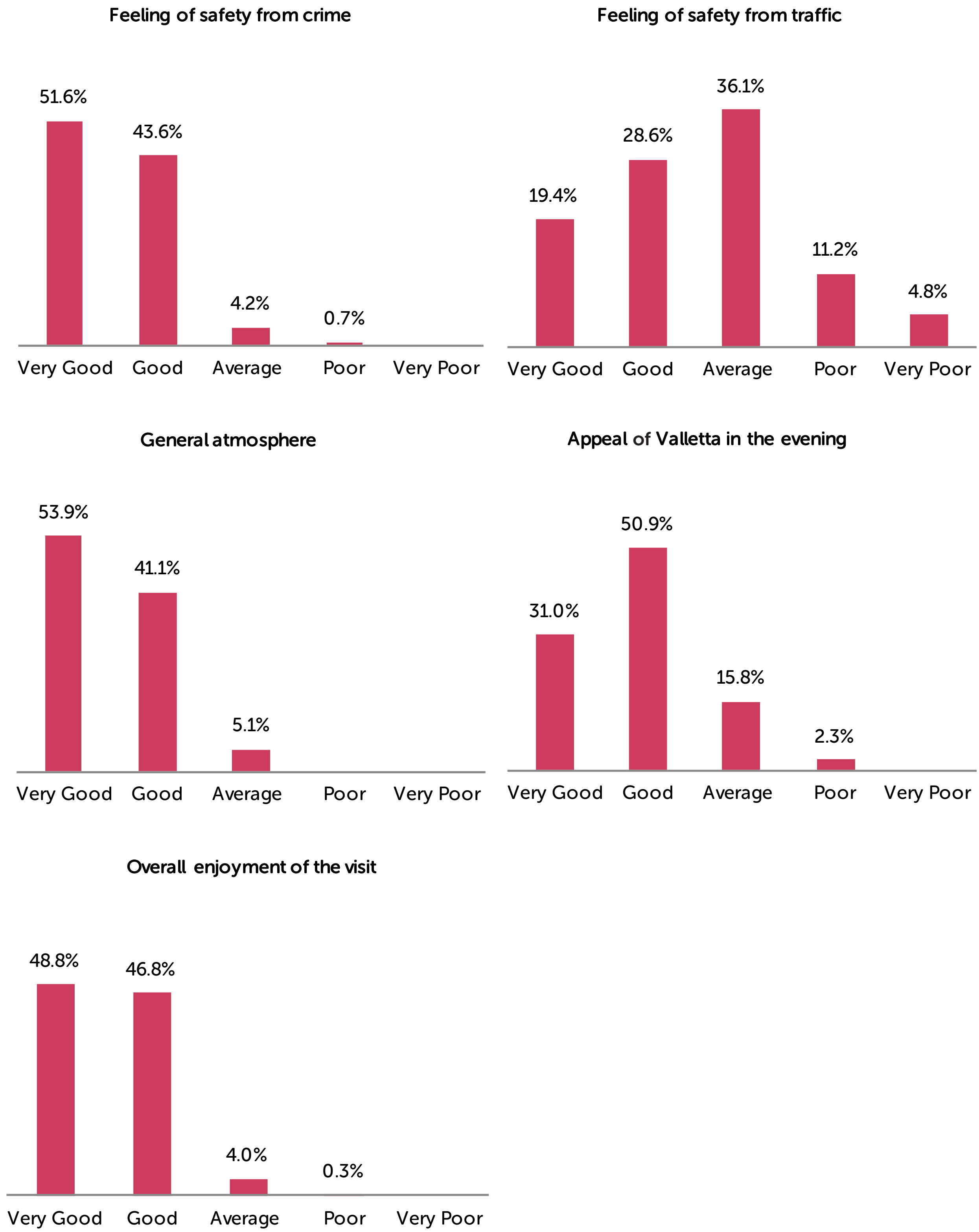
Easily available tourist information plays an important role in overall visitor experience. In relation to this, although feedback is generally positive, there is potential for improvement: 39.7% rated the availability of tourist information as average or below. Likewise, 36.8% of respondents deemed the availability of display maps and information boards as being average or poor.

Figure 11: Overall Tourist Impressions of Valletta



The long-term development of a tourism destination is very much reliant on a good relationship and constructive interaction between tourists and local hosts. In this regard, similar to last year, tourists visiting Valletta expressed highly positive reactions: slightly more than half of respondents rated the feeling of welcome in Valletta as 'very good', and a further 39.6% attributed a 'good' rating. Furthermore, the overwhelming majority (87 %) also perceived the local community to be willing and capable of assisting them by providing information.

Figure 11 (continued): Overall Tourist Impressions of Valletta



95.2% of visitors participating in the survey felt safe from crime whilst touring Valletta. This was not the case as regards feeling of safety from oncoming traffic within the parameters of the city; over half of respondents attributed an average or below average rating.

Valletta's ambiance was thoroughly enjoyed by the overwhelming majority of respondents (95 %). Similarly, visitors found Valletta an appealing place to be at during the evening, albeit to a lesser extent (81.9%).

Overall, tourists highly enjoyed their visit to Valletta, with 48.8% attributing a 'very good' rating, and a further 46.8% attributing a 'good' rating.

Recommending Valletta
Linked to a positive tourist experience isthe willingness to recommend Valletta to family and friends. Nearly three out of five respondents said that they are 'very likely' to recommend Valletta, and a further three out of ten said they are 'likely' to do so.

Figure 12: Likelihood of recommending Valletta

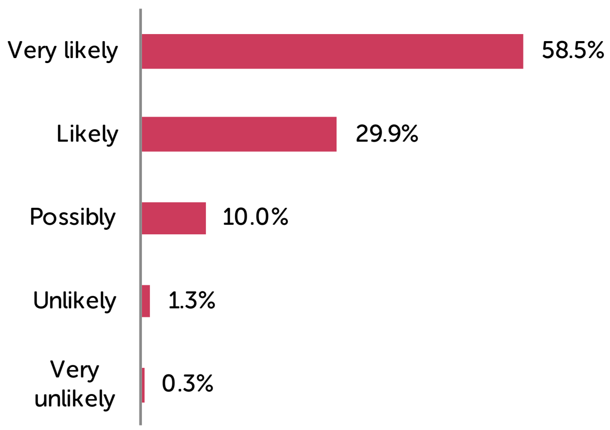
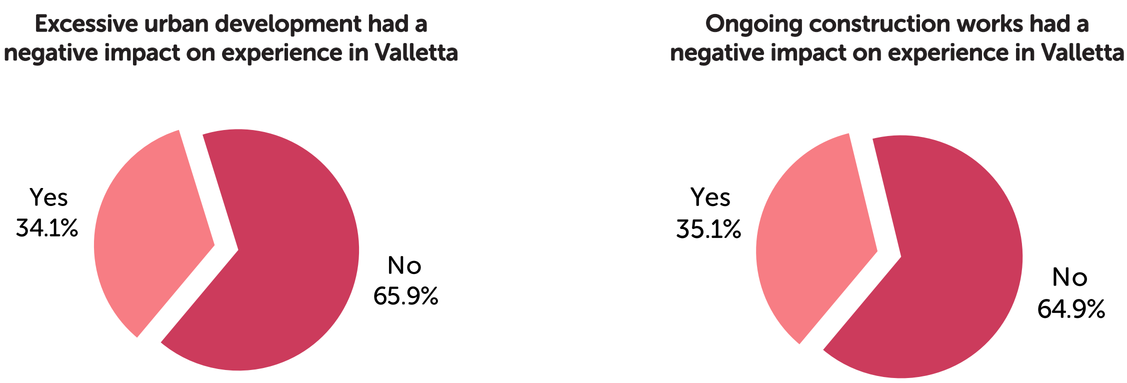


Figure 13: Impact of Urban Development and Ongoing Construction Works on Experience in Valletta



Survey results indicate that although tourist impressions of Valletta were largely positive, ongoing construction works together with excessive urban development within the city had a negative impact on visitor experience; indeed, around 35% answered in the affirmative.

Tourist Perceptions of Valletta

As a further gauge of tourist perceptions, tourists participating in the survey were requested to identify aspects of Valletta they appreciated the most, and any aspects that may have tainted their visitor experience. Feedback was largely positive: out of the total sample of 305 respondents, 282 indicated favorable aspects and 140 identified shortcomings.

The rich historic and cultural offer was the most outstanding asset of Valletta according to survey participants, followed by the grand architecture and streetscape. Other highly appreciated characteristics of the capital included picturesque views and viewpoints, the charming atmosphere, public gardens and open spaces, churches, and the locals' welcoming nature.

On the downside, the most mentioned problem areas related to lack of cleanliness and upkeep, inadequate service in the public transport sector and museums /historical attractions. In comparison to last year, the share of tourists referring to litter in the city increased by 5 %. In addition other negative aspects cited by respondents relate to traffic in the city, lack of public conveniences and overdevelopment and construction within Valletta.

Table 2: Positive and Negative Aspects of Valletta

Valletta: Positive Aspects – Most mentioned (Multiple response)	
History and culture (including heritage sites and museums)	34 %
Architecture and streetscape (including old buildings, facades, streets and alleys)	18.8%
Atmosphere, ambiance and charm	16.3%
Views and landscape	12.4%
Friendliness of local people	9.2%
Gardens, nature reserve, natural environment	7.8%
Churches	6 %
Valletta: Negative Aspects – Most Mentioned (Multiple response)	
Lack of cleanliness, dirty streets, litter, pollution	19.3%
Public Transport Service (delays, disorganised, overcrowded, lack of information, unfriendly drivers, bad driving)	13.6%
Museum/historical attractions Service (lack of staff, no audio tour, lack of information, poor audio guide)	8.6%
Bad traffic, irresponsible driving, over speeding, cars in pedestrian areas	7.9%
Public conveniences (lack of public conveniences, not clean, lack of signage)	6.4%
Overdevelopment and construction	5.7%
Overcrowding in attractions and organised event/groups	5.7%

Awareness of Valletta as the European capital of culture in 2018

The findings presented hereunder are based on data collected during the period of January to September 2016. The sample comprises 683 respondents who completed the Valletta, Mdina, and Birgu-specific Locality Survey.

Awareness of Valletta 2018 Prior to Visit to Malta

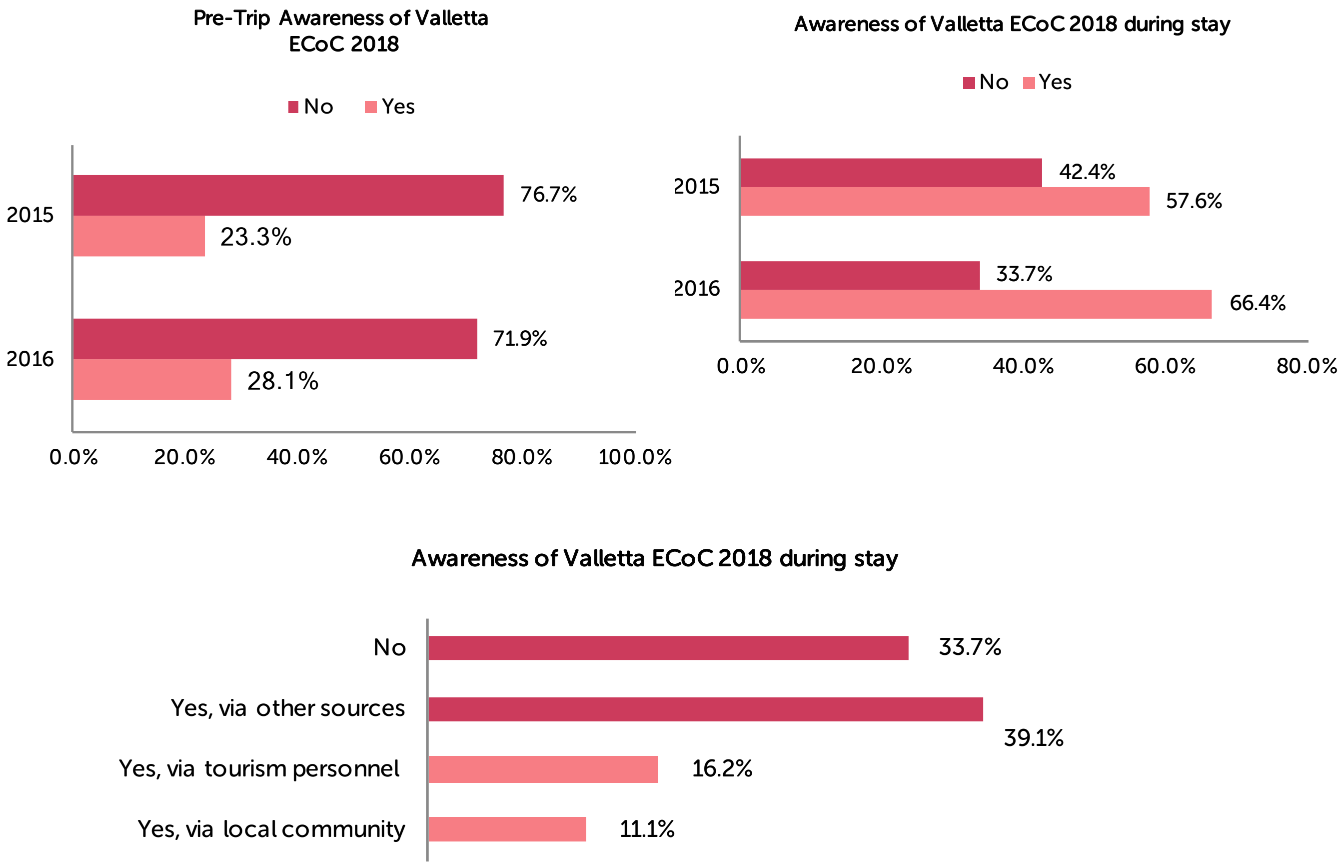
Out of the total sample, slightly more than one fourth of respondents (28.1%) were aware that Valletta will be the European Capital of Culture in 2018 prior their trip to Malta. Pre-trip awareness increased from 23.3% in 2015 to 28.1% in 2016.

Awareness of Valletta 2018 during stay in Malta

6.3% of respondents who were not aware of Valletta ECoC 2018 prior to their trip to Malta became aware during their stay on the islands. This share represents an increase of 8.7% over 2015.

Tourism personnel were the main source of such awareness with a share of 16.2%. The local community also contributed in this regard, with a share of 11.1%.

Figure 14: Awareness of Valletta 2018



CONCLUSIONS & WAY FORWARD

Research findings presented here indicate to a positive tourist experience, with high satisfaction ratings being recorded across most aspects of Valletta's product and service offer. Valletta's rich cultural heritage was highly appreciated by visitors as well as the city's vantage points and panoramic views.

Areas for improvement have also emerged, mainly relating to infrastructure, basic amenities and upkeep. More specifically, lower satisfaction levels were recorded in terms of lack of cleanliness, bad traffic management and cars parked in pedestrian areas, over development and public conveniences. The public transport service and services provided at museums and historical sites also represent areas of improvement.

All in all, tourists felt welcome in Valletta and thoroughly enjoyed their visit, and would consequently be very willing to recommend Valletta to family and friends.

With regards to awareness levels of Valletta being the European Capital of Culture in 2018, compared to 2015, more tourists were aware of this title prior to their visit to Malta.

The Locality Survey is being conducted on an ongoing basis, and once data for the year 2016 is compiled and analysed, it will serve as the base year for the Valletta 2018 Evaluation and Monitoring process. Data collection will continue in 2017 through to 2019, and the identified indicators will be monitored for the duration of these set timeframes.

MARKET PROFILE SURVEY

MALTA TOURISM AUTHORITY RESEARCH UNIT

Tania Sultana with **Mariella Attard** and **Ramona Saliba**

ABSTRACT

The Market Profile Survey is a tourist profiling exercise carried out by the Malta Tourism Authority with the objective of obtaining important insights on tourist behaviour (pre-trip, during trip, and post-trip), levels of satisfaction with elements of Malta's tourism offer and overall tourist experience. For the objectives of the Valletta 2018 Evaluation and Monitoring process, Market Profile Survey data will be used to formulate a profile of tourists opting to reside in accommodation within the parameters of Valletta and Floriana. The share of tourists who are greatly motivated by culture is significantly higher for those staying in accommodation in Valletta and its vicinity compared to tourists staying in other parts of Malta. Indeed, the former express an interest and higher participation in culture-related activities and events.

Keywords: Tourist profile, Cultural participation

INTRODUCTION

The Market Profile Survey is a tourist profiling exercise carried out on an ongoing basis by the Research Unit, operating within the Malta Tourism Authority. The project gives important insights on tourist behaviour (pre-trip, during trip, and post-trip), levels of satisfaction with elements of Malta's tourism offer and overall tourist experience. This market intelligence serves as the basis of the Malta Tourism Authority's decision-making processes in terms of marketing strategy, product and human resource development.

METHODOLOGY

The Market Profile Survey is a voluntary postal survey, with questionnaires distributed to tourists on their arrival at the Malta International Airport. Survey participants self-complete the questionnaire towards the end of their stay in Malta and return it to the Research Unit via pre-paid post.

The target audience comprises tourists residing in Malta's main source tourism markets, namely UK and Ireland, Italy, Germany, France, Spain, Netherlands, Belgium, Austria, Switzerland and the Nordic countries (Sweden, Norway, Denmark, Finland). Questionnaire distribution occurs daily (Monday to Sunday), targeting incoming flights from the aforementioned geographic markets. The survey is available in 6 language versions: English, Italian, French, German, Dutch and Spanish

Relevance to Valletta 2018 Evaluation & Monitoring Objectives
In relation to the objectives of the Evaluation and Monitoring process, Market Profile Survey data will:

- Enable the monitoring of trends in visitor profiles, experiences, perceptions, and preferences for the period 2015 – 2019.
- Serve to formulate a profile of tourists opting to reside in accommodation within the parameters of Valletta and Floriana.

Research Limitations
The Market Profile Survey is funded by the Malta Tourism Authority's budget allocation for market research, and the continuity of this study is reliant on the provision of such funds. The continuity of this project also depends on the research priorities of the Malta Tourism Authority, which may be subject to change during the timeframes of the Valletta 2018 Evaluation and Monitoring Project (2015 – 2019).

The Research Unit's data collection is currently outsourced to a contractor on the basis of a call for tenders. In relation to this, uninterrupted data collection hinges on the availability of data collection personnel and the ability of the contractor to meet the tender requirements set by the Research Unit.

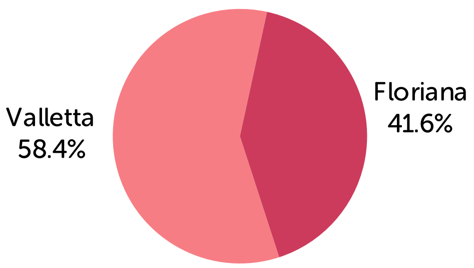
FINDINGS

Profile of Tourists residing in Valletta & Floriana

The findings presented hereunder are based on data collected over the period of January to June 2016. 7.9% of total respondents (190 out of 2,398) resided in accommodation facilities in Valletta/Floriana during their trip to Malta. This share is in line with last year's results.

The sample of 190 respondents is comprised of 111 residing in Valletta (58.4%) and 79 residing in Floriana (41.6%).

Figure 1: Locality of accomodation



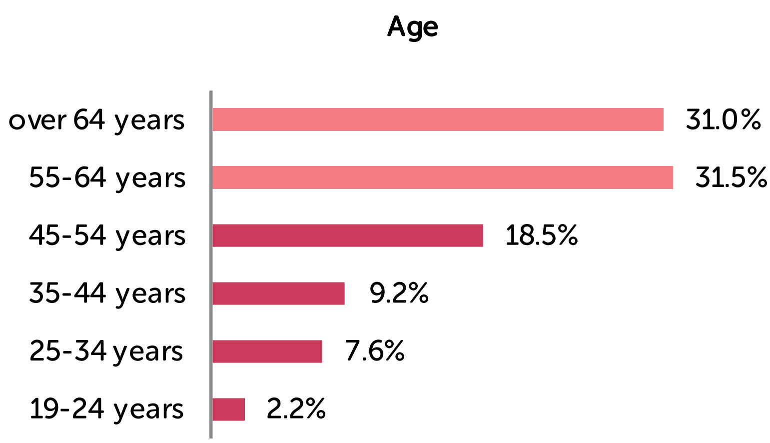
Socio-Demographic Profile

Respondents mainly came from the UK and Ireland (51.1%), France (16.8%), Germany (14.2%), and Italy (4.2%). There was a prevalence of female respondents, with a share of 56.7% compared to 43.3% male respondents. A significant percentage of respondents lived with their spouse or partner (65.1%).

The majority of survey participants had a tertiary education (67.4%) and were mostly employed full-time (39.2%) or retired (38.2%). Average net monthly income was estimated at €3,677. The average age of participants was 56.4 years.

Figure 2: Country of Residence & Age

Country of Residence	
UK & Ireland	51.1%
France	16.8%
Germany	14.2%
Italy	4.2%
Scandinavia	3.7%
Belgium	3.2%
Switzerland	3.2%
Netherlands	1.6%
Spain	1.1%
Austria	1.1%



Sources of Influence in Choosing to Visit Malta

Recommendation by friends/relatives featured to be the most influential communication channel to visit Malta influencing 39.5% of respondents. Internet ranked second (35.8%). The internet is followed by other information channels including travel guide books, tour operator brochures/websites, newspaper and magazine articles, and books. In comparison with last year, the share of respondents influenced by friends (+4.2 %) and the internet (+8.8 %) is relatively higher.

Novelty of the destination featured as the prime influential factor for choosing the Maltese Islands (61.6%). Two out of five respondents chose Malta as there were good flight connections whilst slightly more than one out of three respondents were influenced to come to Malta since English is spoken widely. Other influential factors mentioned were cost value for money, as a result of previous visit and Maltese hospitality.

Figure 3: Sources of Influence - Communication Channels

Sources of Influence - Communication Channels (Multiple Response)	
Recommendation by friends/relatives	39.5%
Internet	35.8%
Travel guide book	16.3%
Tour Operator brochure/website	13.2%
Newspaper/magazine article	6.8%
Books	6.8%

Reasons for Choosing Malta

The categorisation and measurement of cultural tourists is based on respondents' replies to the question on main motivations for visiting Malta. The cultural tourists visiting Malta are classified into two categories 'the greatly motivated' and 'the motivated in part'. 'The greatly motivated' are people who travel to a destination specifically because of its cultural opportunities, such as museums, cultural festivals and theatre. On the other hand, 'the motivated in part' are persons who travel both because of cultural opportunities along with other motivations such as sun, sea and leisure.

Figure 4: Sources of Influence - Influential Factors

Sources of Influence – Influential Factors (Multiple Response)	
Novelty of the destination	61.6%
Good flight connections	40 %
English spoken widely	35.3%
Cost/value for money	25.3%
Previous visit	24.2%
Maltese Hospitality	17.4%

Tourists opting to stay in Valletta/Floriana exhibit a relatively high interest in history and culture. In fact, 24.7% can be termed as 'greatly motivated' by culture in their decision to visit Malta. In comparison, tourists staying in other parts of the island who are 'greatly motivated' by culture represent a lower share of 11 %.

The estimated share of tourists staying in Valletta/Floriana who are 'motivated in part' by culture (40 %) is in line with the share of tourists staying in other parts of Malta (40 %).

Figure 5: Segmentation of Cultural Tourists

Segmentation of Cultural Tourists		
	Tourists residing in Valletta /Floriana	**Tourists residing in other parts of Malta**
'Greatly motivated': People who travel to a destination specifically because of its cultural opportunities, such as museums, cultural festivals and theatre.	24.7%	11%
'Motivated in part': Persons who travel both because of the cultural opportunities along with other motivations such as sun, sea, and leisure.	40 %	40%

Trip Booking Arrangements

On organising their trip to Malta, the majority of respondents preferred to book travel components independently (71.8%). A further 21.8% opted for a holiday package, and the remaining 6.4% booked a combination of package and non-package travel products.

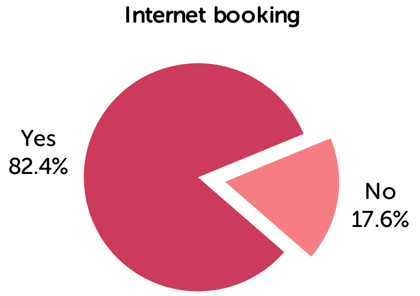
Tourists residing in Valletta/Floriana are more inclined to book a non-package type of trip (71.8%) compared to those staying in other parts of Malta (36.9%).

Similar to last year, around four out of five of respondents booked aspects of their trip to Malta via the internet, particularly flights and accommodation. Some respondents also booked visits to sites and attractions (5.5%) and bought event tickets (4.4%) online.

Figure 6: Type of Booking

Type of Booking	
Package	21.8%
Non-Package	71.8%
Partly Package / Partly Non-Package	6.4%

Figure 6 (continued): Type of Booking

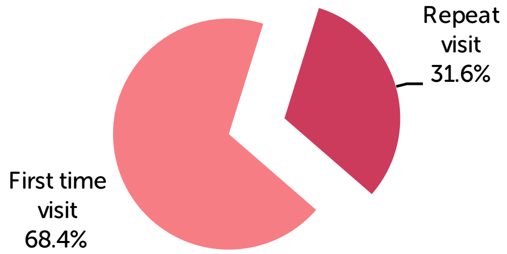


Trip Components Booked via Internet	
Flights	83 %
Accommodation	82.4%
Transfers	22.5%
Vehicle Hire	11 %
Site / Attraction visits	5.5%
Event tickets	4.4%
Excursions	1.1%

Visit to Malta

Similar to last year, around three out of ten respondents were on a repeat trip to Malta.

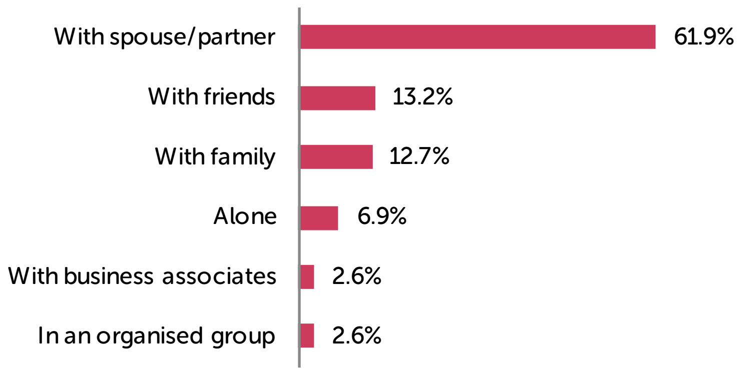
Figure 7: Visita to Malta



Travelling Party

Respondents were mainly travelling with their spouse/partner (61.9%). A further 25.9% were travelling with family members or friends. Solo travellers represented a share of 6.9%.

Figure 8: Travelling Party



Accommodation Stayed in Valletta & Floriana

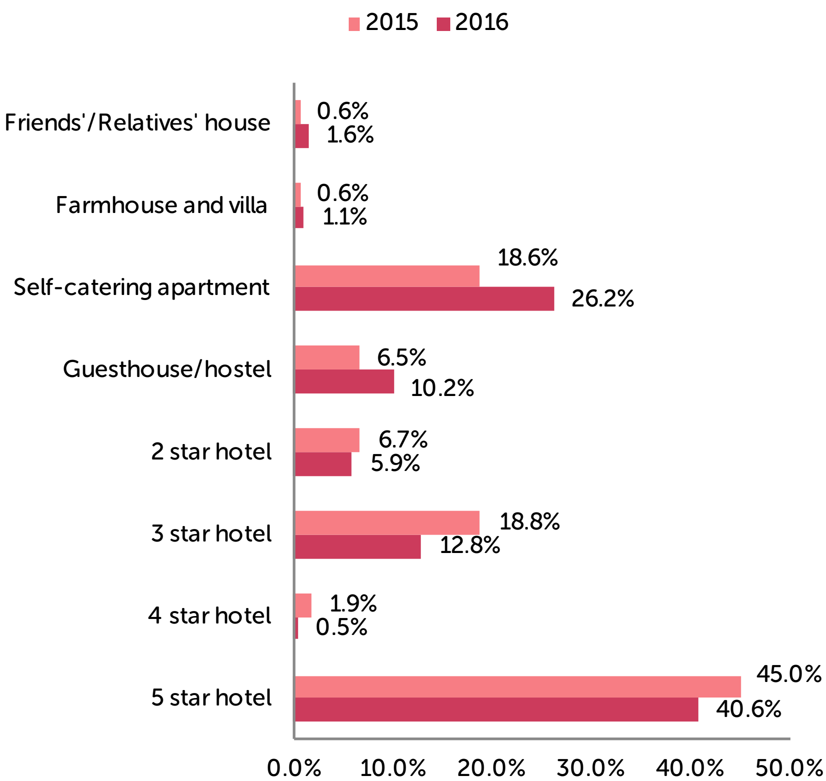
Seven in ten respondents opted for serviced accommodation, namely 5-star and 3-star hotels (40.6% and 12.8% respectively). The remaining 29.9% stayed in self-catering or private accommodation.

Bed and breakfast was the most preferred accommodation basis (59.2%), followed by self-catering (20.7%).

Survey results indicate that in comparison to last year, the share of respondents staying in self-catering/ private accommodation is higher (+8.7 %) whilst the share of tourists staying in 3-star accommodation experienced a decline.

Further analysis shows that tourists residing in Valletta (excluding Floriana), mainly stayed in 3-star hotels (22.2%), self-catering apartments (34.3%), 2-star hotels (10.2%) or guesthouses/hostels (17.6%). Amongst tourists residing in Floriana, 5-star hotel accommodation was the prevalent option (92.4%).

Figure 9: Type of Accomodation



Activities Engaged in whilst in Malta

For the purposes of this project, comparisons were drawn between tourists residing in Valletta/Floriana and tourists residing in other parts of the Malta during their trip. It is worth noting that tourists staying in Valletta/Floriana have a higher participation in culture-related activities when compared to tourists staying in other parts of Malta. Indeed, the former have a higher engagement in terms of visits to museums, churches, historical buildings and temples/archaeological sites. Likewise, there is also a higher engagement in events such as live music events/concerts, local festival events and the performing arts.

Multiple Response

The share of participation in the various cultural activities is in line with last year's results (this includes those elements which could be compared due to the revamped Market Profile Survey launched in 2016).

Figure 10: Cultural Participation

Cultural activities engaged in:	%	%	Cultural events attended:	%	%
Sightseeing	92.1%	91.2%	Attend theatre/ musical/opera/ dance	7.9%	2.8%
Visit temple/archaeological sites	54.7%	49 %	Attend live music event/ concert	11.1%	3.6%
Visit historical buildings	86.8%	77.6%	Attend local festival/event	15.8%	10.7%
Visit museums	69.5%	46.6%	Attend traditional religious feast	7.9%	4.6%
Visit churches	83.7%	69.5%	Attend visual arts event	4.2%	2.8%
Visit arts/crafts sites	20 %	25.6%			
Visit local produce sites /agro-experiences	8.9%	10.5%			

Tourists residing in Valletta & Floriana

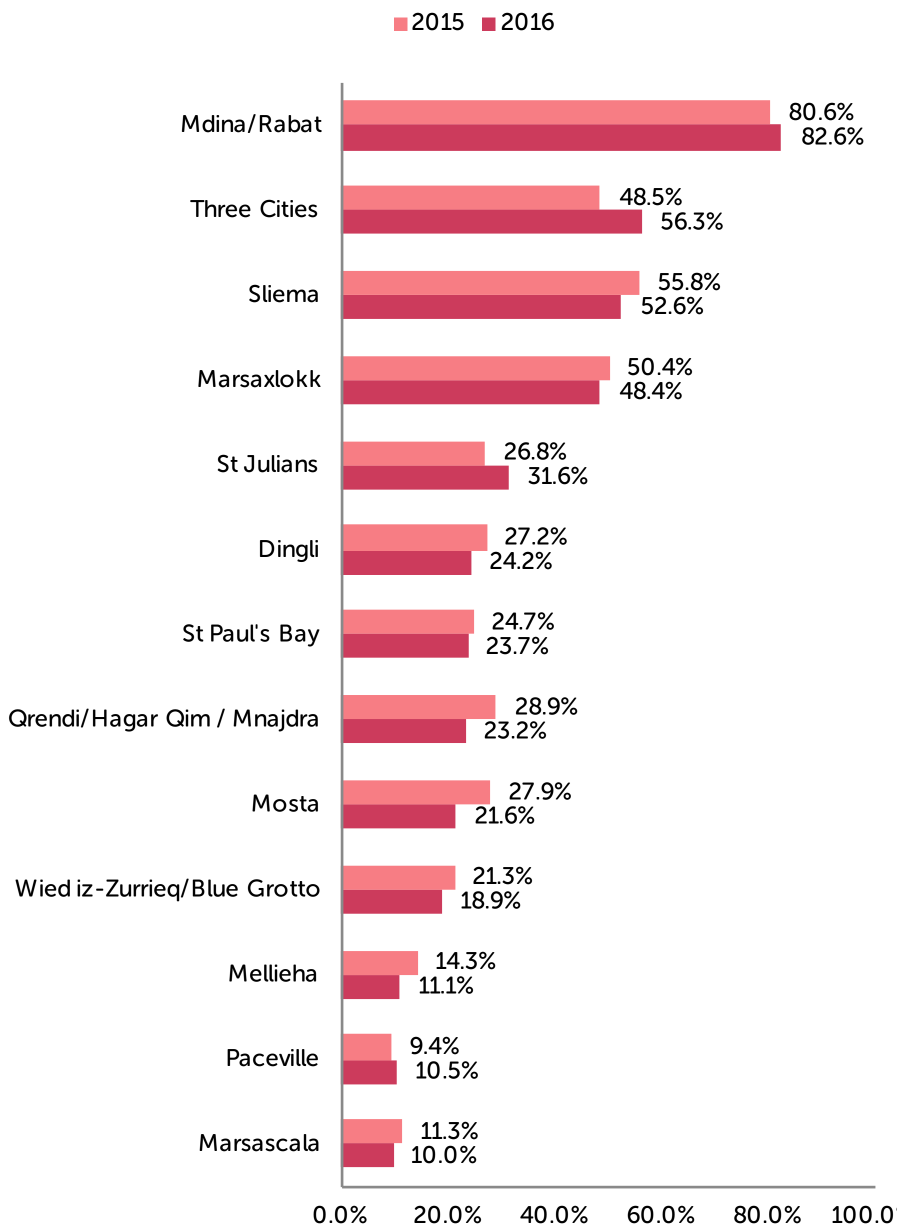
Tourists residing in other parts of Malta

Localities Visited During Stay in Malta

Tourists residing in Valletta/Floriana also expressed an interest in other historic localities, and have visited Mdina/Rabat (82.6%) and the Three Cities (56.3%) during their stay. Coastal areas were also highly visited, particularly Sliema (52.6%), Marsaxlokk (48.4%) and St.Julians (31.6%)

Compared to last year, the share of respondents visiting the Three Cities is relatively higher (+7.8 %).

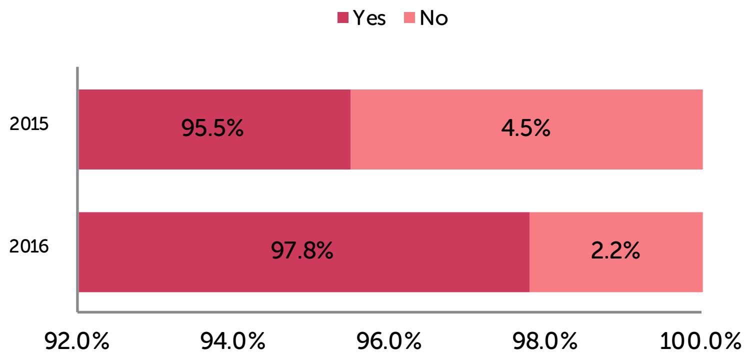
Figure 11: Localities visited in Malta



Recommending Malta and Intention to Visit Again

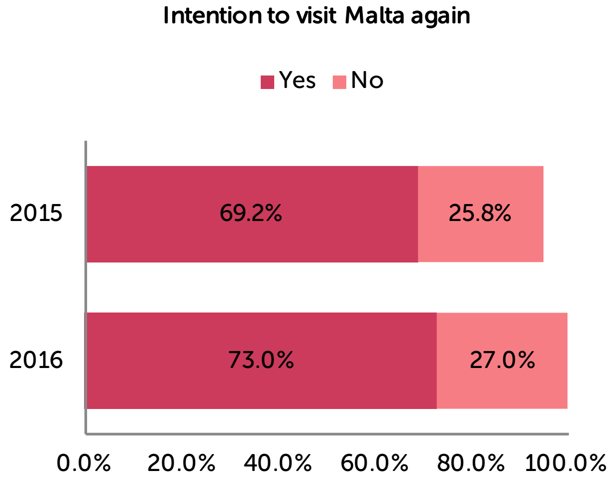
The overwhelming majority said that they would happily recommend Malta to friends and relatives (97.8%). Compared with last year's figures the share of tourists willing to recommend Malta registered an increase of 2.3 %.

Figure 12: Willingness to recommend Malta



Following a positive experience in Malta, a substantial 73 % expressed an intention to re-visit Malta in the near future, mainly in the next one to two years (39.2%) or in five years or more (24.2%). Compared to last year's figures, the share of tourists willing to visit Malta again registered an increase (+3.8 %).

Figure 13: Intention to visit Malta again

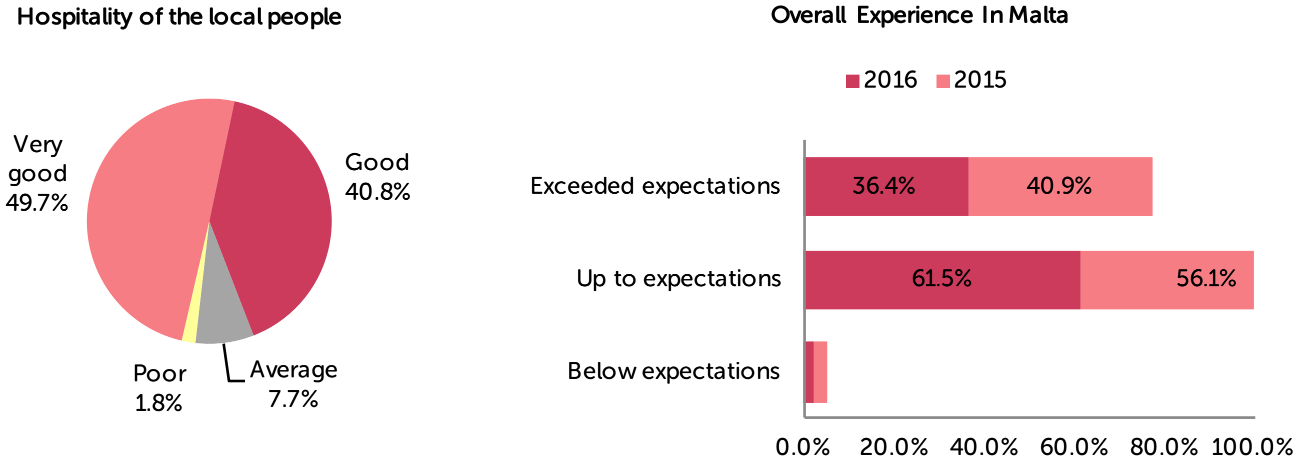


Intention to visit Malta again in:	
Less than 1 year	13.3%
In 1 to 2 years	39.2%
In 3 to 4 years	23.3%
In 5 years or more	24.2%

Overall Impressions

An important aspect of the tourist experience is the positive interaction with the host community. In this regard, 90.5% of survey participants were impressed by the local people's hospitality. Furthermore, most respondents expressed satisfaction about their overall experience in Malta, with 61.5% saying that Malta met their expectations and a further 36.4% noting that their expectations were exceeded. The share of tourists stating that their overall experience in Malta exceeded expectations declined from 40.9% in 2015 to 36.4% in 2016. Furthermore, Malta met the expectations of more tourists.

Figure 14: Overall Impressions



CONCLUSIONS & WAY FORWARD

A key aspect that emerges from the foregoing exercise is that for tourists staying in the parameters of Valletta, history and culture takes a more prominent role in destination choice compared to tourists staying in other parts of Malta. Indeed, the former express an interest and higher participation in activities and events that are of a cultural nature.

The Market Profile Survey is being carried out on a continuous basis, and once data for the entire year 2016 is compiled and analysed, it will serve as the base year for the Valletta 2018 Evaluation and Monitoring process. Data collection will continue in 2017 through to 2019, and the identified indicators will be monitored for the duration of these set timeframes.

The current Market Profile Survey has been revamped and re-launched in January 2016. The survey has been adapted to better cater for new trends in trip behaviour but has maintained all core indicators and therefore the continuous provision of the selected indicators for Valletta 2018 Evaluation and Monitoring process will not be put at stake.

CONCLUDING REMARKS

Tourism has long been a pillar of the local economy, and the European Capital of Culture title will undoubtedly be influential in the tourism landscape throughout the upcoming period. The studies carried out by the Malta Tourism Authority delve deeper into this influence in order to understand the way in which incoming tourism is being affected by Valletta 2018 and the cultural, social and economic regeneration taking place.

The studies so far indicate that the ECoC title is does indeed have a bearing on the decision made by incoming tourists to visit Malta, with a growing proportion of visitors aware of Valletta's ECoC title and the cultural activity taking place within the city. These indications will continue to be analysed over the coming years to obtain a more complete understanding of the impact of Valletta 2018 not only on local communities, but also on a broader international scale.

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