

'Measuring the impact of ECoC Valletta 2018 on Travel Motivations and Behaviour of Tourists in Malta'

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‘Measuring the impact of ECoC Valletta 2018 on travel motivations and behaviour of tourists in Malta’ (Experience/Application paper)

Abstract

Valletta was awarded the prestigious title of European Capital of Culture (ECoC) 2018 in October 2012. Following this, the Valletta 2018 Foundation set up an Evaluation & Monitoring Steering Committee to evaluate and monitor the impacts of the ECoC title in Malta over a five year period 2015 to 2019.

The Malta Tourism Authority along with other government entities and a number of academics is a contributor in this process of evaluation and monitoring.

The scope of this paper is to provide insight into the methodologies adopted by the MTA to meet the objectives set by the Steering Committee, namely relating to ‘The Tourist Experience’. The specific aspects investigated are the following:

- the measurement of cultural tourism by level of interest
- a tourist profiling exercise comparing tourists residing within Valletta to those staying in other parts of Malta
- the assessment of awareness levels of Valletta’s ECoC title amongst tourists visiting Malta
- an evaluation of tourists’ perceptions of Valletta

The research methodology adopted by the MTA enables the evaluation process of the impacts of the ECoC title on tourism to go beyond the timeframes set by the Steering Committee, and thus allows for impact measurement in the longer term.

Key words: European Capital of Culture (ECoC), tourist experience, cultural tourism, motivational segmentation

European Capital of Culture Valletta 2018

Malta, with its strategic central position in the Mediterranean, has long attracted visitors whether as conquerors, traders or travellers. Today, Malta welcomes 1.8 million visitors for leisure and business purposes. Renowned for its unique blend of sunshine and history, Malta attracts visitors for its prestigious cultural legacy as well as its contemporary lifestyle.

Valletta was declared European Capital of Culture (ECoC) in October 2012. Valletta 2018 Foundation was set up in June 2011 to coordinate the bidding process and is now responsible for the implementation of the project.

Valletta 2018 Evaluation & Monitoring Steering Committee

The Valletta 2018 Foundation devised a five-year research plan to evaluate the impact of the ECoC title for the period 2015 to 2019. To facilitate this process, the Evaluation & Monitoring Steering Committee was set up, bringing together practitioners and academics. This involves the participation of professionals from public entities namely the National Statistics Office (NSO), the Malta Tourism Authority (MTA), the Economic & Policy Division (EPD) and the Employment & Training Corporation (ETC), together with a number of independent academic researchers.

The research plan of the Evaluation & Monitoring Steering Committee is structured around 5 themes:

- Cultural and territorial vibrancy – focusing on the success of the Valletta 2018 cultural programme and changes in cultural participation
- Governance and finance – understanding the related impact on Malta’s creative sector
- Community inclusion and space – assessing impact of cultural and infrastructural regeneration projects on community groups
- The Valletta brand – measuring the success of the Valletta 2018 communication strategy
- The tourist experience – evaluating the impact of Valletta 2018 on tourist profiles, motivations and behaviour

MTA’s role in the Evaluation & Monitoring Steering Committee

The contribution of the MTA is centred on ‘The Tourist Experience’. The objective of this theme is to monitor trends in the tourist socio-behavioural profile and perceptions as a result of Valletta 2018. The research process will run for the period 2015 to 2019, with baseline studies carried out in 2015.

The five objectives of the MTA are oriented towards measuring the impact of ECoC Valletta 2018 on:

1. The share of cultural tourism to Malta.
2. The different categories of cultural tourism based on levels of interest.
3. The motivational and behavioural profile of tourists opting to stay in accommodation establishments situated in the parameters of Valletta.
4. Tourists’ awareness of Valletta ECoC status; pre-trip and during trip awareness, and ECoC as a principal motivation for visiting Malta.
5. Tourists’ perceptions of Valletta in terms of image, and product and service offer.

Methodology used to evaluate and monitor Objectives 1, 2 and 3

The market intelligence used to meet Objectives 1, 2 and 3 is based on the MTA’s ongoing Traveller Survey. The Traveller Survey is a profiling exercise which 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.

The Traveller Survey is a voluntary postal questionnaire, which is randomly distributed to tourists on their arrival at the Malta International Airport (MIA). Survey participants self-complete the questionnaire towards the end of their stay in Malta and return it via pre-paid post. The target audience of this survey comprises tourists residing in Malta’s main source tourism markets, namely the United Kingdom, Ireland, Italy, Germany, France, Spain, Netherlands, Belgium, Austria, Switzerland and the Nordic countries. Questionnaire distribution occurs on a daily basis targeting incoming flights from the aforementioned geographic markets. The survey is available in 6 language versions: English, Italian, French, German, Dutch and Spanish.

This scientifically-based information serves as the basis of the Malta Tourism Authority’s decision-making processes in terms of marketing strategy, product and human resource development.

This research tool has recently been revamped and re-launched in January 2016. The survey has been adapted to better cater for new trends in trip behaviour and to allow for better categorisation and measurement of motivational segments including ‘cultural tourism’.

Objective 1 and 2: Categorisation and Measurement of Cultural Tourism

The categorisation of cultural tourism on the basis of ‘levels of interest’ is inspired by the model presented in the keynote speech entitled ‘The Power of Cultural Tourism’ by Gail Dexter Lord at Wisconsin Heritage Tourism Conference in September 1999.

Lord identifies four main categories of Cultural Tourists as follows:

1. The greatly motivated	People who travel to a destination specifically because of its cultural opportunities, such as museums, cultural festivals and theatre.
2. The motivated in part	Persons who travel both because of the cultural opportunities along with other motivations such as sun, sea and leisure.
3. The adjunct	People for whom culture is an add-on to another more important motivation.
4. The accidental	People for whom culture is not a motivation to visit a destination but engage unintentionally in cultural-related activities once at the destination.

The Traveller Survey prior 2016 update

Prior to the latest revision of the Traveller Survey, three different questions were used to feed the process of categorising total tourists by motivation. The aforementioned questions related to main purpose of visit (e.g. walking/hiking), reasons for choosing Malta (e.g. history and culture) and activities engaged in during stay (e.g. diving). These questions presented an overlap between ‘motivations driving trip decision-making’ and ‘interests of tourists exhibited in the type of activities they choose to participate in during stay’. As a result, the main challenge of this approach was to accurately categorise tourists by motivation and level of interest at decision-making stage.

The Traveller Survey updated in 2016

To address this information gap, the updated version of the Traveller Survey incorporates motivational interests at decision-making stage into one question, allowing respondents to choose up to three main motivations to enable the measurement of both single and multiple interest driven trip choices.

What are your main motivations for visiting the Maltese Islands? (Multiple response question; respondents can tick up to 3 motivations)		
<input type="checkbox"/> Sun, sea and leisure	<input type="checkbox"/> History and culture	<input type="checkbox"/> Convention/conference/seminar
<input type="checkbox"/> Incentive trip	<input type="checkbox"/> Business/other work	<input type="checkbox"/> Visiting friends/relatives
<input type="checkbox"/> Getting married/honeymoon	<input type="checkbox"/> Special occasion	<input type="checkbox"/> Medical care
<input type="checkbox"/> Wellness	<input type="checkbox"/> Language course	<input type="checkbox"/> Educational/study
<input type="checkbox"/> Religious/pilgrimage/spiritual	<input type="checkbox"/> Cultural/music event (specify)	<input type="checkbox"/> Scuba diving
<input type="checkbox"/> Other sports (specify)	<input type="checkbox"/> Other (specify)	

The categorisation and measurement of cultural tourists is based on respondents’ replies to the question on main motivations for visiting the Maltese Islands (as featured above). With reference to Lord’s model mentioned earlier, cultural tourists visiting Malta are classified into the three categories: ‘the greatly motivated’, ‘the motivated in part’ and ‘the accidental’. The current Traveller Survey does not allow for the specific measurement of ‘the adjunct’. In the case of Malta, ‘the adjunct’ are included with ‘the motivated in part’ as respondents are not asked to rank main motivations by importance but simply to tick the top three motivations for visiting Malta.

The key objective here is to break down the total number of tourists by key motivation of visit also allowing for overlap between motivations, considering that people may not always choose a destination on the basis of one interest but may have several. In view of the remarkable number of possible combinations presented by the question featured above, a decision was taken to allow for the measurement of overlap between 'history and culture', 'religious/pilgrimage/spiritual', 'culture/music event', 'sun, sea and leisure' and 'wellness'. This decision is based on the fact that the selected motivations are either strongly interrelated with culture per se or else are 'leisure generic' whereby combination with history and culture is a common occurrence as shown in past findings. On the basis of the specificity of the remaining motivations (e.g. language course, conference etc), it was decided to consider them as key motivators in their own right.

Estimate of 'Greatly motivated' cultural tourists is based on the following options:

- Respondents who only tick 'History and culture' as their main motivation (opting not to tick any of the other featured motivations)
- Respondents who tick 'Culture/music event'
- Respondents who only tick 'Religious/pilgrimage/spiritual' as their main motivation
- Respondents who tick 'Religious/pilgrimage/spiritual together with 'History and culture' (opting not to tick any of the other featured motivations)

Estimate of 'motivated in part' cultural tourists is based on the following options:

- Respondents who tick 'History and culture' together with 'Sun, sea and leisure' as their main motivations (opting not to tick any of the other featured motivations)
- Respondents who tick 'History and culture' together with 'Religious/pilgrimage/spiritual' and 'Sun, sea and leisure' (opting not to tick any of the other featured motivations)
- Respondents who tick 'History and culture' together with 'Wellness' (opting not to tick any of the other featured motivations)
- Respondents who tick 'History and culture' together with 'Religious/pilgrimage/spiritual' and 'Wellness' (opting not to tick any of the other featured motivations)
- Respondents who tick 'History and culture' together with 'Wellness' and 'Sun, sea and leisure' (opting not to tick any of the other featured motivations)

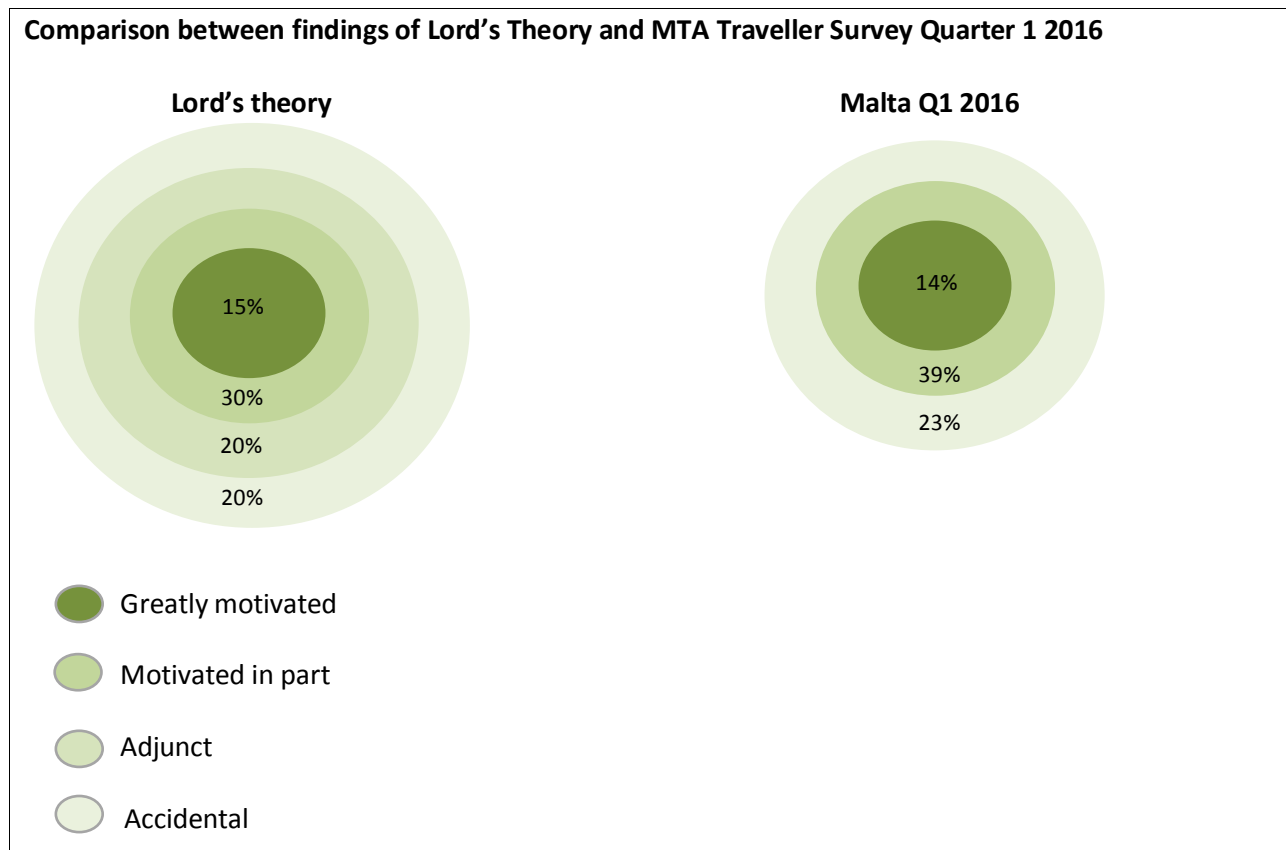
The measurement of 'accidental' cultural tourists is based on respondents' combination of replies to two specific questions featured in the Traveller Survey. In addition to the motivations question featured earlier, respondents are also asked to provide feedback on 'Cultural activities' engaged in during their stay in Malta.

Which cultural activities did you engage in?		
<input type="checkbox"/> Sightseeing	<input type="checkbox"/> Visit temple/archaeological sites	<input type="checkbox"/> Visit historical buildings
<input type="checkbox"/> Visit museums	<input type="checkbox"/> Visit churches	<input type="checkbox"/> Visit arts/craft sites
<input type="checkbox"/> Visit local produce sites/agro	<input type="checkbox"/> Visit national aquarium	<input type="checkbox"/> Attend theatre/musical/opera/dance
<input type="checkbox"/> Attend live music event/concert	<input type="checkbox"/> Attend local festival/event	<input type="checkbox"/> Attend traditional religious feast
<input type="checkbox"/> Attend visual arts event		

Estimate of ‘accidental’ cultural tourists is based on the following options:

- Respondents who do not tick ‘History and culture’ or ‘Religious/pilgrimage/spiritual or ‘Cultural/music event as one of their main motivations and who tick engagement in one or more of the cultural activities featured above; with the exclusion of ‘Sightseeing’ and ‘Visit to national aquarium’ which for the sake of this exercise are considered to be of a more generic leisure nature.

The ultimate objective of this approach is to monitor the effectiveness of Valletta’s ECoC status in increasing the share of tourists who are ‘greatly motivated’ or ‘motivated in part’ by Malta’s cultural offer at trip decision-making stage.



The MTA’s findings on measurement of cultural tourists by level of interest happen to be in line with the breakdown presented in Lord’s paper. In the case of Malta, 14% of inbound tourists based their decision to visit Malta on their high interest in culture (the greatly motivated). Furthermore, for a substantial 39%, culture features as one of the main motivations for visiting (the motivated in part). Additionally, nearly one fourth of respondents were not motivated at all by culture in their decision but chose to participate in cultural activities once at the destination (the accidental).

Objective 3: Identifying the motivational and behavioural profile of tourists opting to stay in accommodation establishments situated in the parameters of Valletta

Respondents of the Traveller Survey are asked to specify the ‘locality of accommodation’ stayed in. This enables trend analysis on the locality of accommodation chosen by tourists together with comparative analysis on the profile of tourists according to the locality stayed in. In relation to the two questions

highlighted earlier on 'tourists' motivations for visiting' and 'cultural activities engaged in during stay', analysis carried out specifically for the requirements of the Evaluation & Monitoring Steering Committee shows that tourists opting to stay in the parameters of Valletta, are relatively more motivated by history and culture at decision-making stage followed by higher engagement in cultural-related activities during stay.

Quarter 1 2016 Findings:

- **91% of inbound tourists visited Valletta during stay**
- **9% of inbound tourists chose to stay in accommodation establishments within the parameters of Valletta**
- **Tourists staying within Valletta exhibited a higher interest in history and culture**
 - 'Greatly motivated' by culture accounted for 33% (more than double compared to the 14% for total Malta)
 - Higher participation in culture-related activities

Methodology used to evaluate and monitor Objectives 4 and 5

Indicators feeding Objectives 4 and 5 are based on the MTA's Locality Survey. This continuous research exercise concentrates on a number of tourist zones featuring a mix of historic and seaside characteristics.

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

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

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

Objective 4: Evaluating Tourists' pre-trip and during trip awareness of Valletta ECoC status and ECoC as principal motivation for visiting Malta

The Locality Survey questions providing insight on awareness and motivations:

Prior to your visit to Malta, were you aware that Valletta is the European Capital of Culture (ECoC) for 2018?

Yes No

If no, did you become aware that Valletta is the ECoC 2018 during your stay in Malta?

Yes, via tourism personnel Yes, via local community Yes, via other sources

Main motivations for visiting Malta (tick all that apply):

- | | | |
|---|--|--|
| <input type="checkbox"/> Sun, sea and leisure | <input type="checkbox"/> History and culture | <input type="checkbox"/> Valletta as ECoC for 2018 |
| <input type="checkbox"/> Visiting friends/relatives | <input type="checkbox"/> Business | <input type="checkbox"/> Language course/study |
| <input type="checkbox"/> Diving | <input type="checkbox"/> Other sport | <input type="checkbox"/> Wedding/honeymoon |
| <input type="checkbox"/> Health | <input type="checkbox"/> Other (specify) | |

2015 Findings:

- Around 23% of respondents were aware of Valletta’s status as a European Capital of Culture in 2018.
- Over half of respondents (57.6%) who were not aware of Valletta ECoC 2018 prior to their trip to Malta became aware during their stay on the islands.
- Tourism personnel were the main source leading to such awareness with a share of 22.1%. The local community also contributed in this regard, with a share of 5.4%.
- Around 1 out of 3 respondents remained unaware of Valletta’s ECoC status.
- 2.6% of total respondents specifically visited Malta due to Valletta’s ECoC title.

Objective 5: Evaluating tourists’ perceptions of Valletta in terms of image, product and service offer

The Locality Survey questions gauging tourist satisfaction levels with Valletta’s offer:

Rate the following aspects by ticking as appropriate: Very good Good Average Poor Very poor Not applicable		
Accommodation Facilities Quality of service Value for money	Restaurants Variety of restaurants Quality of service Value for money	Shopping Variety of shops Availability of local products Quality of local products Quality of service Value for money Opening hours
Cultural/historic attractions Variety of attractions Presentation of attractions Quality of service Variety of events/performances Value for money Opening hours Viewpoints and vistas	Entertainment Variety of entertainment facilities Quality of service Value for money	Tourist information Availability of display maps/info boards Availability of tourist information Quality of service MTA tourist information office
Urban environment & amenities Availability of open spaces Upkeep of gardens & open spaces Cleanliness Accessibility of sites & amenities State of pavements Pedestrian signs Road signs Ease of parking Availability of public toilets Cleanliness of public toilets Public transport service to/from locality	Overall impressions General atmosphere Feeling of welcome Ability of locals to provide info Feeling of safety from crime Feeling of safety from traffic Appeal of the locality at night Overall enjoyment of visit	

The Locality Survey questions providing insight on tourists' image of Valletta:

What did you like most about Valletta? (open-ended question)

What if anything spoilt your visit to Valletta? (open-ended question)

2015 Findings:

Research findings 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 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. Opening hours of cultural/historic attractions and retail outlets also present opportunities for improvement.

Overall, tourists highly enjoyed their visit to Valletta, with 51.5% attributing a 'very good' rating, and a further 41.4% attributing a 'good' rating.

Tourists' image of Valletta – what tourists liked most about the city and aspects which have tainted their experience to some extent:

Valletta: Highlights – Most mentioned (Multiple response)

History and culture (including heritage sites and museums)	32.8%
Architecture and streetscape (including old buildings, facades, streets and alleys)	22.5%
Viewpoints and vistas	15.6%
Ambiance and charm	13.5%
Gardens and open spaces	13.1%
Churches	12.3%
Friendliness of local people	8.6%

Valletta: Weaknesses – Most Mentioned (Multiple response)

Overdevelopment and ongoing construction works	14.3%
Littering and lack of cleanliness	14.3%
Poor infrastructure for pedestrians (including pedestrian zones, pavements, and crossings)	8.7%
Traffic and reckless driving	6.3%
Tourist overcrowding in sites and attractions	4.8%

Survey limitations

Traveller survey

The current questionnaire does not allow for the specific measurement of the segment identified as 'adjunct' in Lord's theory. Whilst it is sensitive to the fact that motivations do overlap, tourists are not asked to rank their main motivations. This means that in MTA's model 'the adjunct' is included with 'the motivated in part'. Notwithstanding this, MTA's methodology meets the objectives of both the MTA and the Valletta 2018 Evaluation & Monitoring Steering Committee.

The Traveller Survey does not target all source markets. Whilst it captures the majority of main and secondary source markets, countries like Poland and Hungary, which nowadays generate a significant number of tourists, do not form part of the sampling frame for the time being.

Locality survey

Limitations associated with the Locality Survey relate to data collection issues. Questionnaires are distributed during day-time meaning that tourists visiting localities in the evening only are not captured.

Data collection for both surveys is currently outsourced and 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 MTA.

Conclusions

The involvement of a wide range of public entities and academics in the Evaluation & Monitoring Steering Committee ensures optimisation of the use of data and information already available in the country on the themes identified in the research plan. In addition to this, the Committee brings together research experts from different sectors namely, culture, tourism, economy, anthropology and spatial planning. In turn, this facilitates cross fertilisation of ideas and concepts between academics and practitioners.

The MTA's Traveller Survey and the Locality Survey carried out on a continuous basis give added value to the official statistics published by the NSO. The Traveller Survey allows for total inbound tourist figures published by the NSO to be further categorised by specific motivational segment and is also sensitive to the existing overlap between segments.

MTA's Locality Survey enables a thorough evaluation of the offer in specific tourist zones. This gives insights on which the entities concerned, including Valletta 2018 Foundation, can prioritise interventions aimed at improving the image, product and service offer at a local level.

The surveys carried out by the MTA are primarily based on the requirements of the organisation as they provide a scientific platform on which decision making is based. This commitment of the MTA to fund the two surveys in question allows for trend analysis ranging from pre-, during, to post-evaluation of the impact of ECoC Valletta 2018 on travel motivations and behaviour of tourists. Furthermore, post-evaluation can take place in the short, medium and long term.

References

Gail Dexter Lord, 'The Power of Cultural Tourism', Keynote presentation, Wisconsin Heritage Tourism Conference, Wisconsin, September 1999

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MTA Locality Survey Reports, 2015