

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

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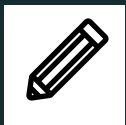
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14th Global Forum on Tourism Statistics, Venice 2016

Session 5: Tourism, Culture and Creative Industries

Thursday 24th November 2016



Introduction

- 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 Evaluation & Monitoring Steering Committee brings together practitioners and academics. This involves the participation of professionals from public entities representing various sectors (including economy, culture and the arts and tourism), together with a number of independent academic researchers.
- The Malta Tourism Authority (MTA) representing the tourism industry was identified as a main contributor in this committee.



The MTA's Role

- The contribution of the MTA is centred on 'The Tourist Experience'.
- The MTA was given 5 objectives 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 in the parameters of Valletta.
 4. Tourist awareness of Valletta ECoC status, pre-trip and during trip; and ECoC as a pull factor for visiting Malta.
 5. Tourist perceptions of Valletta in terms of image, product and service offer.

Categorisation and Measurement of Cultural Tourism

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

Lord identifies 4 main categories of Cultural Tourists as follows:

The greatly motivated	People who travel to a destination specifically because of its cultural opportunities, such as museums, cultural festivals and theatre.
The motivated in part	Persons who travel both because of the cultural opportunities along with other motivations such as sun, sea and leisure.
The adjunct	People for whom culture is an add-on to another more important motivation.
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.



‘Greatly Motivated’

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) | |

Question featured in ‘MTA’s Traveller Survey’

Possible Combinations:

- History and Culture
- Culture/Music Event
- Religious / pilgrimage / spiritual
- Religious / pilgrimage / spiritual History and Culture



‘Motivated in Part’

What are your main motivations for visiting the Maltese Islands? (Multiple response question; respondents can tick up to 3 motivations)

- Sun, sea and leisure
- Incentive trip
- Getting married/honeymoon
- Wellness
- Religious/pilgrimage/spiritual
- Other sports (specify)
- History and culture
- Business/other work
- Special occasion
- Language course
- Cultural/music event (specify)
- Other (specify)
- Convention/conference/seminar
- Visiting friends/relatives
- Medical care
- Educational/study
- Scuba diving

Question featured in ‘MTA’s Traveller Survey’

Possible Combinations:

- History and Culture Sun, Sea and Leisure
- History and Culture Sun, Sea and Leisure Religious / Pilgrimage / Spiritual
- History and Culture Wellness
- History and Culture Wellness Religious / Pilgrimage / Spiritual
- History and Culture Wellness Sun, Sea and Leisure



‘Accidental’

What are your main motivations for visiting the Maltese Islands? (Multiple response question; respondents can tick up to 3 motivations)

- | | | |
|---|---|---|
| <input checked="" type="checkbox"/> Sun, sea and leisure | <input type="checkbox"/> History and culture | <input checked="" type="checkbox"/> Convention/conference/seminar |
| <input checked="" type="checkbox"/> Incentive trip | <input checked="" type="checkbox"/> Business/other work | <input checked="" type="checkbox"/> Visiting friends/relatives |
| <input checked="" type="checkbox"/> Getting married/honeymoon | <input checked="" type="checkbox"/> Special occasion | <input checked="" type="checkbox"/> Medical care |
| <input checked="" type="checkbox"/> Wellness | <input checked="" type="checkbox"/> Language course | <input checked="" type="checkbox"/> Educational/study |
| <input type="checkbox"/> Religious/pilgrimage/spiritual | <input type="checkbox"/> Cultural/music event (specify) | <input checked="" type="checkbox"/> Scuba diving |
| <input checked="" type="checkbox"/> Other sports (specify) | <input checked="" type="checkbox"/> Other (specify) | |

Which cultural activities did you engage in?

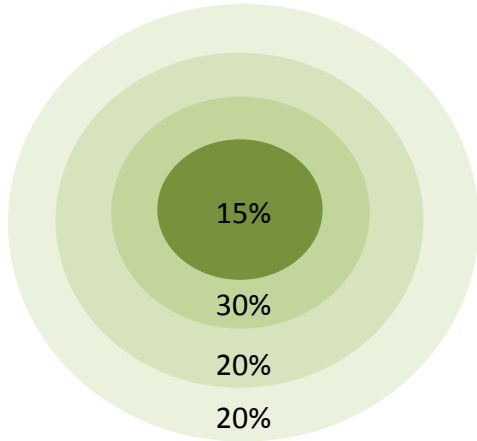
- | | | |
|---|--|--|
| <input type="checkbox"/> Sightseeing | <input checked="" type="checkbox"/> Visit temple/archaeological sites | <input checked="" type="checkbox"/> Visit historical buildings |
| <input checked="" type="checkbox"/> Visit museums | <input checked="" type="checkbox"/> Visit churches | <input checked="" type="checkbox"/> Visit arts/craft sites |
| <input checked="" type="checkbox"/> Visit local produce sites/agro | <input type="checkbox"/> Visit national aquarium | <input checked="" type="checkbox"/> Attend local festival/event |
| <input checked="" type="checkbox"/> Attend live music event/concert | <input checked="" type="checkbox"/> Attend theatre/musical/opera/dance | <input checked="" type="checkbox"/> Attend traditional religious feast |
| <input checked="" type="checkbox"/> Attend visual arts event | | |

Questions featured in ‘MTA’s Traveller Survey’

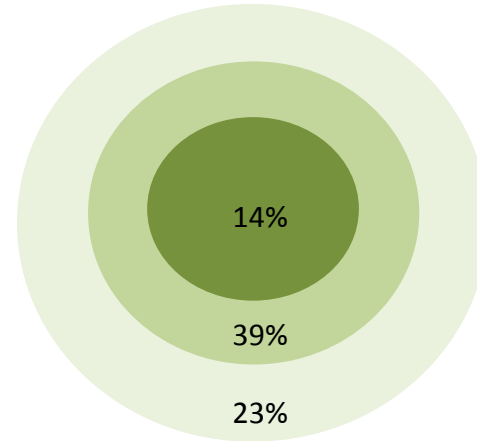


Q1 2016 Findings

Lord's Theory



Malta Q1 2016



- Greatly motivated
- Motivated in part
- Adjunct
- Accidental

Identifying the Motivation & Behaviour of Tourists opting to stay in Valletta

- The main source of information used to meet Objectives 1, 2 and 3 is based on the MTA's ongoing Traveller Survey. It gives insights on the socio-demographic profile, behaviour, satisfaction levels 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.
- Survey participants self-complete the questionnaires towards the end of their stay in Malta and return it via pre-paid post.
- The target audience comprise tourists residing in Malta's main source tourism markets.
- Questionnaire distribution occurs on a daily basis and the questionnaire is available in 6 language versions (English, Italian, French, German, Dutch and Spanish).
- The survey allows for specific analysis by locality of accommodation used.



Q1 2016 Findings

91% of inbound tourists visit Valletta during stay

9% of inbound tourists stay in accommodation establishments within the parameters of Valletta

Tourists staying in Valletta exhibited higher interest in history & culture (33% greatly motivated by culture)

Evaluating Pre and During Trip Awareness of Valletta ECoC 2018

- Indicators feeding Objectives 4 and 5 are based on the MTA's Locality Survey.
- The Locality Survey is a voluntary postal questionnaire, which is randomly distributed to tourists of any origin, who are residing or visiting the identified historic (Valletta, Mdina, Vittoriosa) and seaside localities (Sliema, St.Julians, St.Paul's Bay, Mellieha).
- Tourists are approached in the streets and are requested to complete the questionnaire at their convenience.
- The questionnaire is available in 4 language versions (English, Italian, French, and German) and questionnaire distribution occurs 3 times a month per locality throughout the whole year.
- The questionnaire has been re-designed and re-launched in February 2015, to incorporate specific questions on tourist awareness of Valletta ECoC 2018 title.

Evaluating Awareness

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

Question featured in 'MTA's Locality Survey'

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

Sun, sea and leisure

Visiting friends/relatives

Diving

Health

History and culture

Business

Other Sport

Other (Specify)

Valletta as ECOC for 2018

Language course / study

Wedding / honeymoon

Question featured in 'MTA's Locality Survey'



2015 Findings

23.3% of respondents were aware of Valletta's status as ECoC 2018

22.1% of respondents learnt about Valletta ECoC thanks to tourism personnel

Around **1** out of **3** respondents remained unaware of Valletta's ECoC.

2.6% of total respondents specifically visited Malta due to Valletta's ECoC title

43.3% became aware of Valletta ECoC 2018 during stay

Evaluating Tourist Perceptions of Valletta

- The Locality Survey provides insight on tourist perceptions and image of Valletta.
- In the questionnaire, tourists are asked to rate the product and service offer and highlight the strengths and weakness of the Capital City.
- The different aspects making up the offer are rated on various criteria namely facilities, service and value for money.
- Research findings indicate to a positive tourist experience where Valletta's rich cultural heritage was highly appreciated by visitors.



Tourist Perceptions of Valletta

Rate the following aspects of the offer:

Accommodation

Restaurants

Shopping

Cultural / historic attractions

Cultural/Historic Attractions

Entertainment

Tourist Information

Urban environment / amenities

Overall Impressions

What did you like most about Valletta? (*Open-Ended Question*)

What if anything spoilt your visit to Valletta? (*Open-Ended Question*)

Questions featured in 'MTA's Locality Survey'



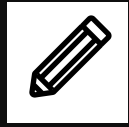
Tourist Perceptions of Valletta

Valletta: Strengths– 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)*

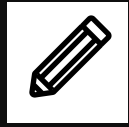
Overdevelopment and ongoing construction works	14.3%
Littering and lack of cleanliness	14.3%
Poor infrastructure for pedestrians (including pedestrian zones, pavements, and crossings)	8.7%
Traffic and reckless driving	6.3%
Tourist overcrowding in sites and attractions	4.8%



Final Comments

Survey Limitations:

- In categorising ‘Cultural Tourism’, the current questionnaire does not allow for the specific measurement of the group identified as ‘adjunct’ in Lord’s theory.
- While it is sensitive to ‘multiple motivations’ in travel, tourists are not asked to rank their main motivations but simply to identify the top 3.
- The Traveller Survey does not target all source markets (~85% of inbound tourism). Countries like Poland and Hungary, which nowadays generate significant volumes, do not yet form part of the sampling frame.



Final Comments

Conclusions:

- The involvement of a wide range of public entities and academics in the Evaluation & Monitoring Committee ensures optimisation of the use of data and information available in the country on the themes identified in the research plan.
- MTA's surveys are carried out on a continuous basis, primarily to guide decision making in the organisation, thus allowing for post-impact evaluation of Valletta ECoC 2018 to take place in the short, medium and long term.