

THEME 4 THE TOURIST EXPERIENCE



EVALUATION & MONITORING
Research Findings 2015

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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 presented 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
- Employment & Training Corporation
- 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**

Mariella Attard

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 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.

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, nearly a fourth of survey participants were aware of the ECoC title prior their trip to Malta. Once visiting Malta, however, awareness levels increased to over half of respondents.

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.

FINDINGS

TOURIST EXPERIENCE IN VALLETTA

The findings presented hereunder are based on data collected during the period of February – October 2015. A sample of 277 respondents participated in the Valletta-specific Locality Survey within this timeframe.

Socio-Demographic Profile

Tourists participating in the Valletta-specific Locality Survey mainly came from the UK and Ireland (40.7%), Germany (13.1%), France (9.1%) and Italy (6.9%). There was a preponderance of female respondents, with a share of 57.8% compared to 42.2% male respondents. They had an average age of 51 years, with half of respondents falling within the '55 to 64 years' bracket (26.6%) or the '65 years and over' bracket (23.0%).

Top Countries of Residence	
Germany	13.1%
France	9.1%
Italy	6.9%
Eastern European Countries	5.6%
Australia	5.5%
Switzerland	3.6%
Belgium	3.3%
Nordic Countries	3.0%
USA and Canada	2.9%

Age	
Under 19 years	1.5%
19 – 24 years	1.5%
25 – 34 years	16.3%
35 – 44 years	12.9%
45 – 54 years	18.2%
55 – 64 years	26.6%
65 years and over	23.0%

Over half of respondents were visiting Malta with their partner (57.1%). A further 17.8% made the trip with friends and/or relatives (17.8%), and 13.5% were travelling as a family with children (13.5%).

Nearly three in every four survey participants were visiting Malta for the first time. The remaining 26.3% were repeat visitors

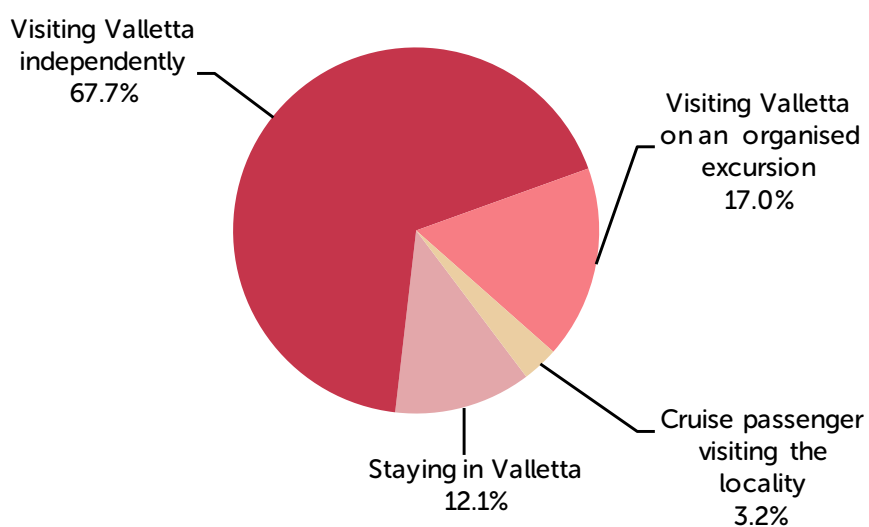
Figure 1: Visits to Malta



Type of Visit to Valletta

Most of the respondents were visiting Valletta independently (67.7%). A further 17.0% were visiting the capital on an organised excursion and 12.1% were residing in Valletta for the duration of their stay in Malta. The remaining share of 3.2% was represented by cruise passengers who were on a day trip to Valletta.

Figure 2: Type of visit to Valletta



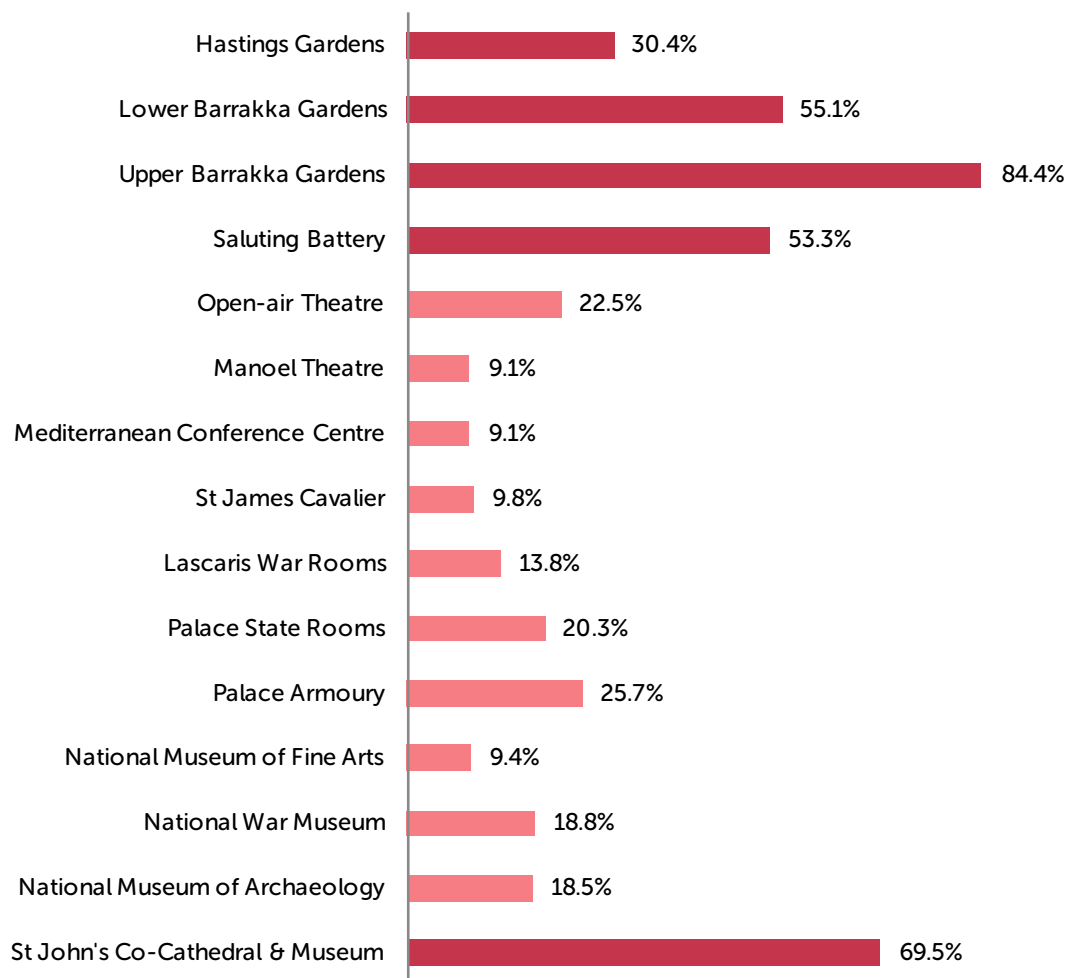
Cultural Participation

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

It transpires that the public gardens within Valletta were the most popular outdoor attractions: the most frequented being the Upper Barrakka Gardens (84.4%), followed by the Lower Barrakka Gardens (55.1%), and Hastings Gardens ranking third (30.4%).

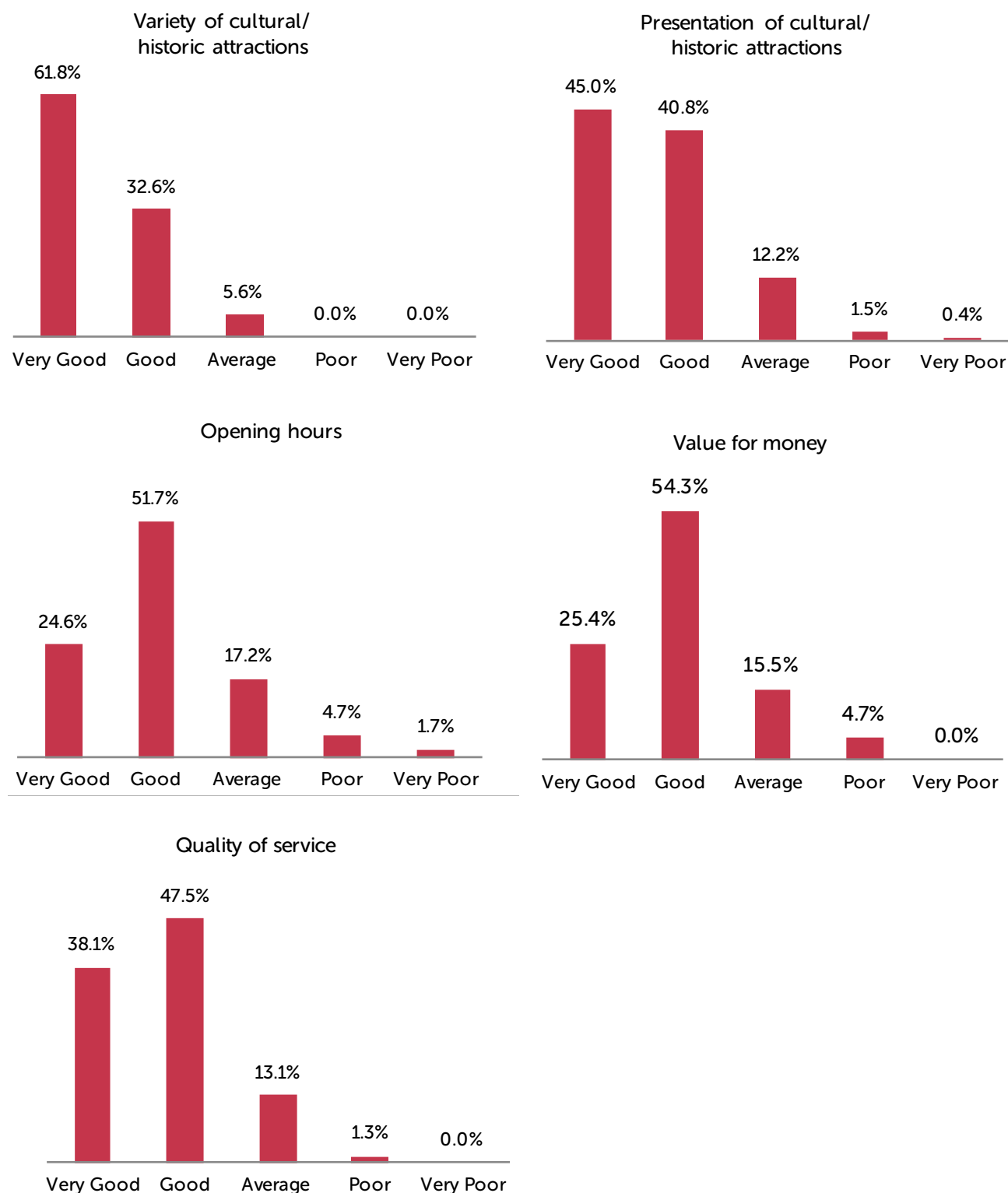
St John's Co-Cathedral and Museum topped the list of historic attractions, with 69.5% of respondents paying a visit. It was followed by the Saluting Battery (53.3%), the Palace Armoury (25.7%), and the Palace State Rooms (20.3%)

Figure 3: Visits to cultural attractions



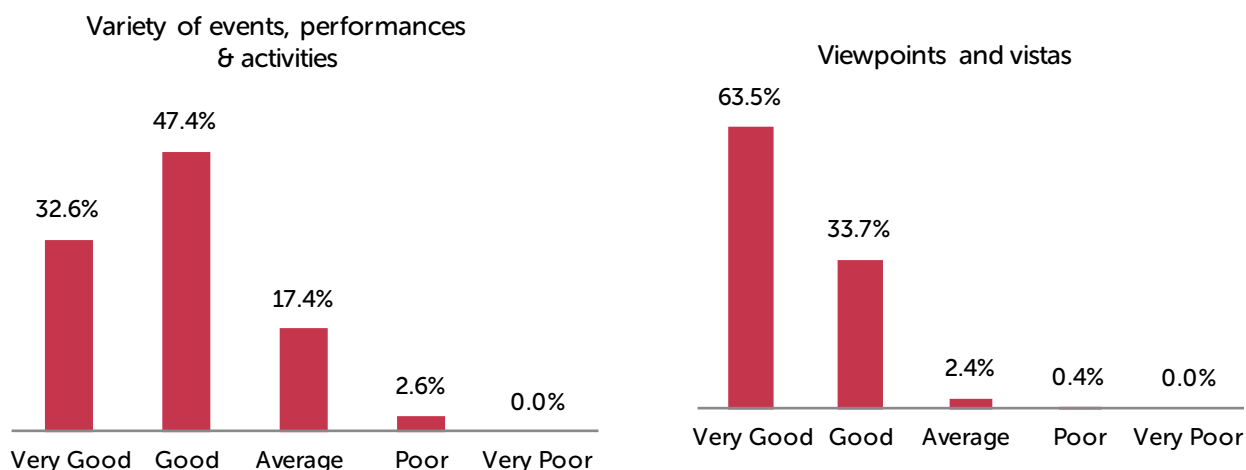
Respondents were also invited to mention any events or activities that they attended. A small number of respondents mentioned specific events, namely the yearly Carnival celebrations, and the lunchtime concerts that are held regularly in Valletta (at the Oratory of St Francis Church, Tal-Pilar Church, and St James Cavalier amongst others).

Figure 4: 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 (94.4%). In terms of the presentation and valorisation of cultural and historic sites, satisfaction levels were also high albeit to a lesser extent. Quality of service offered at these sites was generally rated as 'good' (47.5%) or 'very good' (38.1%). In comparison, value for money and opening hours of sites were less positively rated.

Figure 4 (continued): Evaluation of Cultural/Historic Attractions in Valletta



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

Figure 4 (continued): Evaluation of Cultural/Historic Attractions in Valletta



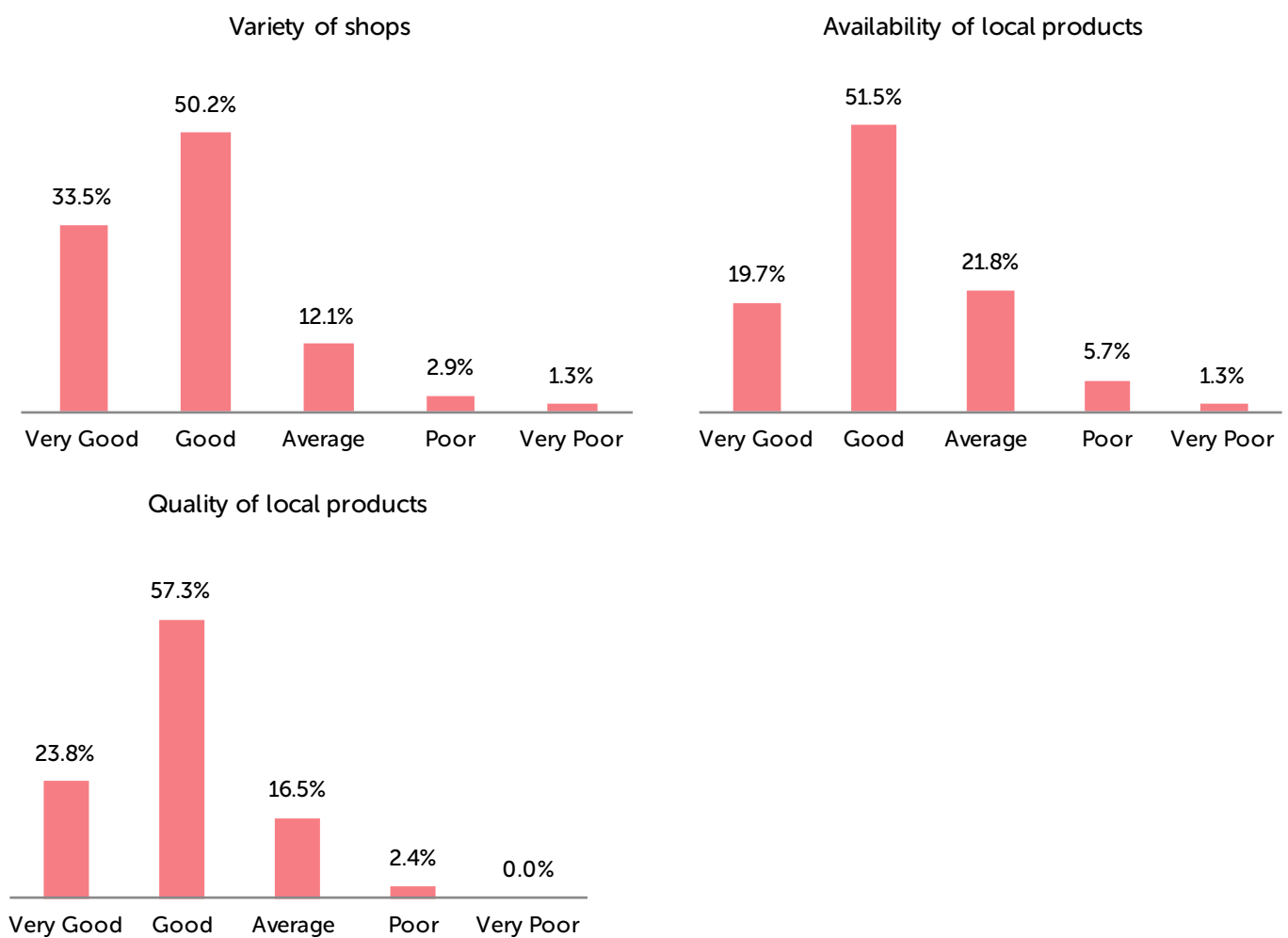
The capital's viewpoints and vistas were the most positively rated aspect in Valletta, with 97.2% of respondents attributing an above average rating.

relating to the entertainment offer in Valletta, the majority of respondents expressed satisfaction with the variety and the quality of service offered. In contrast, one in four respondents considered value for money for entertainment to be average or below.

Evaluation of Retail Offer in Valletta

The majority of respondents were pleased with the quality of service received at the shops. On the other hand, shop opening hours and to a lesser extent value for money were rated less favourably.

Figure 5: Evaluation of retail offer in Valletta



Evaluation of Restaurant Offer in Valletta

Eight in ten respondents rated the variety of retail outlets as above average. Specifically on the availability of local products in shops, however, satisfaction ratings were lower; nearly three in ten attributing an average or below average rating.

The quality of local products 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.

Tourists expressed high satisfaction levels in terms of the choice of restaurants available in Valletta, with over 80% attributing above average ratings. In comparison, although largely favourable, aspects relating to quality of service and good value in restaurants were considered to be average or below by a larger share of respondents.

Figure 6: Evaluation of retail restaurant offer in Valletta

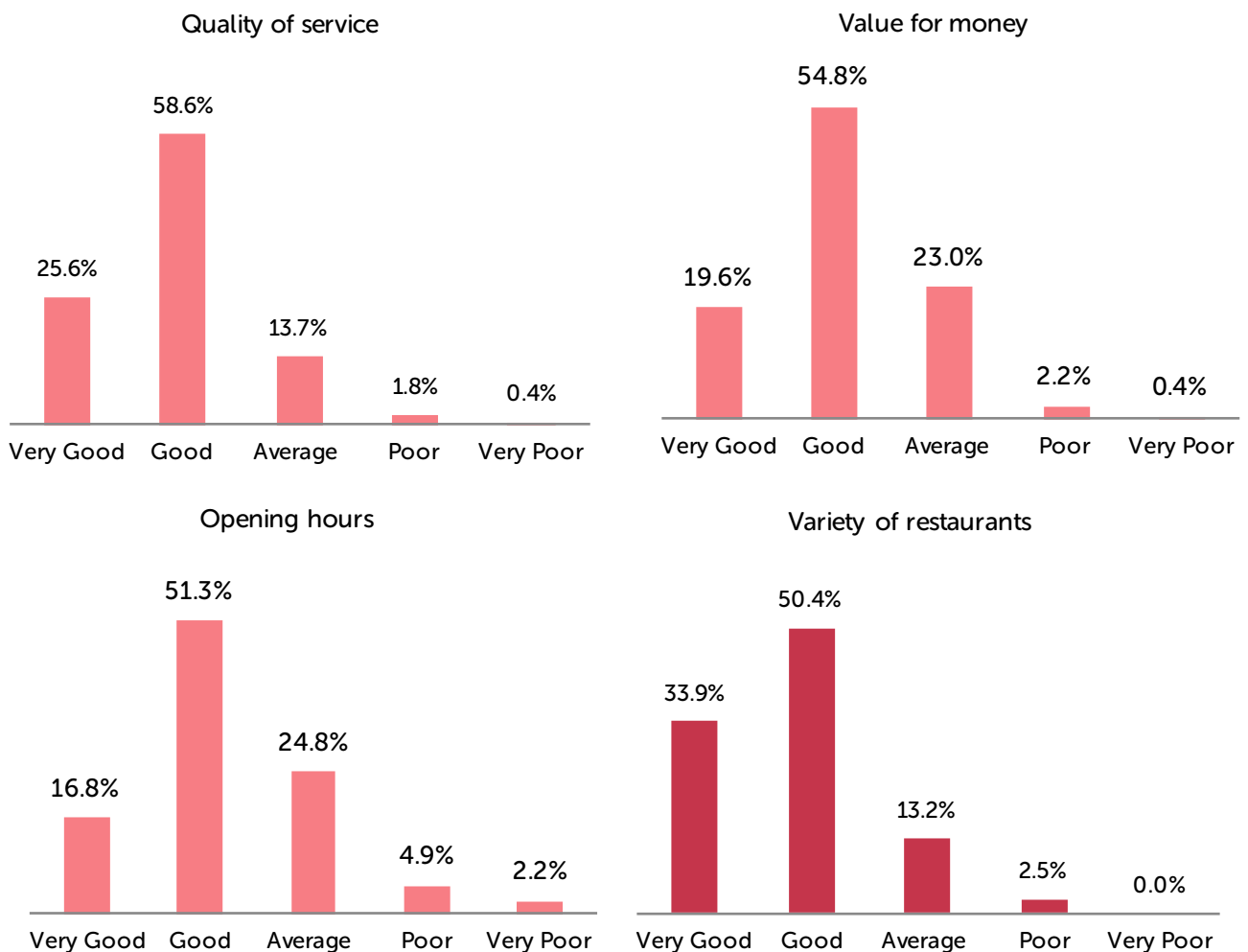
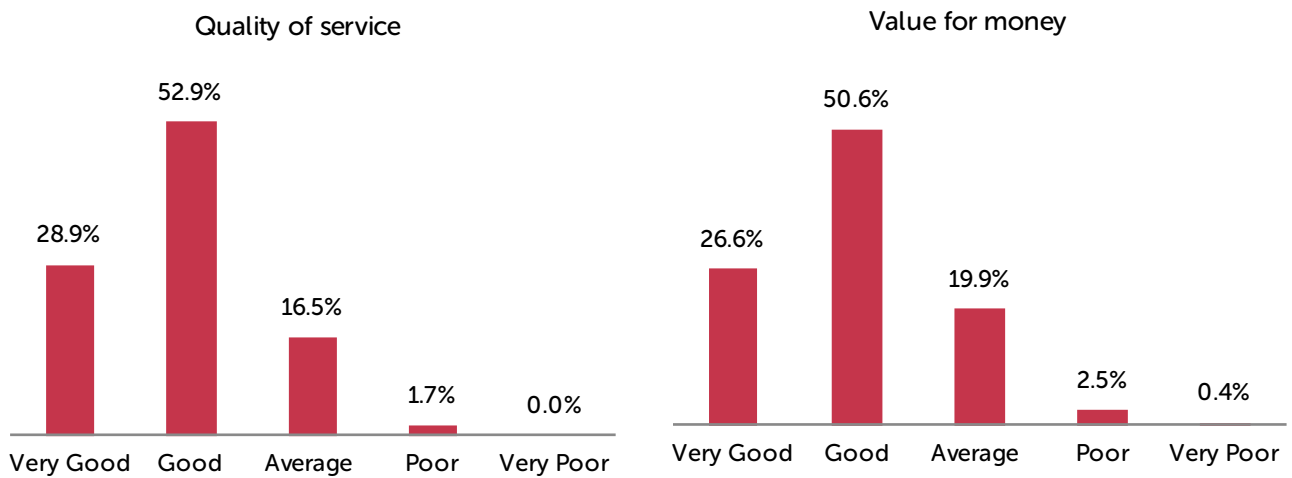


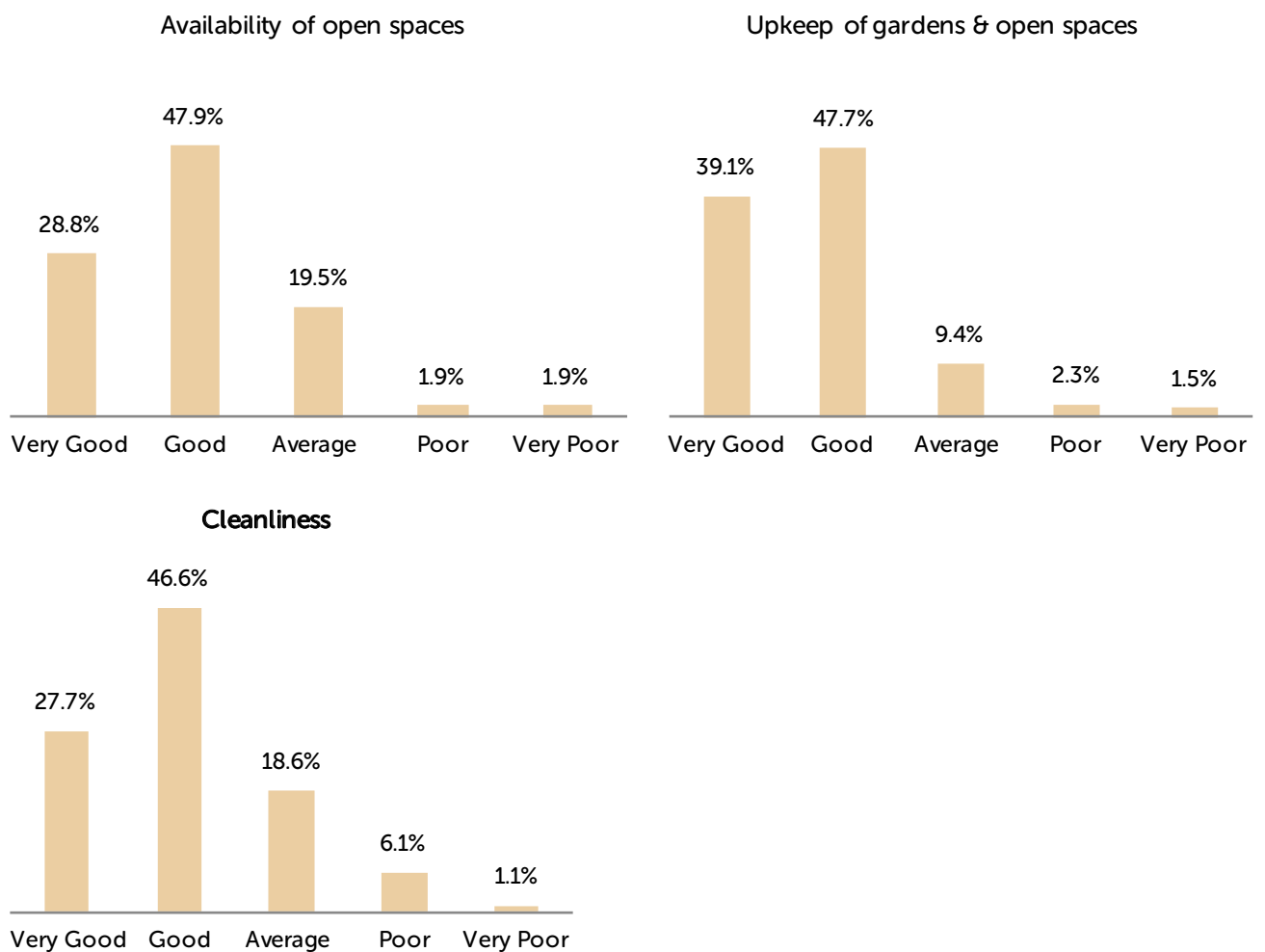
Figure 6 (continued): Evaluation of retail restaurant offer in Valletta



Evaluation of Urban Environment & Amenities in Valletta

Most respondents rated the upkeep of gardens and open spaces in Valletta positively. More specifically with regard to the availability of open spaces, feedback was largely positive although to a lesser extent; nearly one fourth of respondents attributed an average or below average rating.

Figure 7: Evaluation of urban environment & amenities in Valletta



Similarly, the larger share of respondents rated Valletta's overall cleanliness favourably, with the exception of 7.2% who expressed dissatisfaction. Lower satisfaction levels were also recorded for public conveniences, particularly in terms of availability, with 60.9% attributing 'average' to 'very poor' ratings. Cleanliness of public conveniences was also deemed as mediocre by nearly half of respondents.

Respondents making use of a vehicle during their stay expressed dissatisfaction with the parking facilities in Valletta, with 52.4% 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; eight in ten rated the public transport as either 'very good' or 'good'.

Figure 7 (continued): Evaluation of urban environment & amenities in Valletta

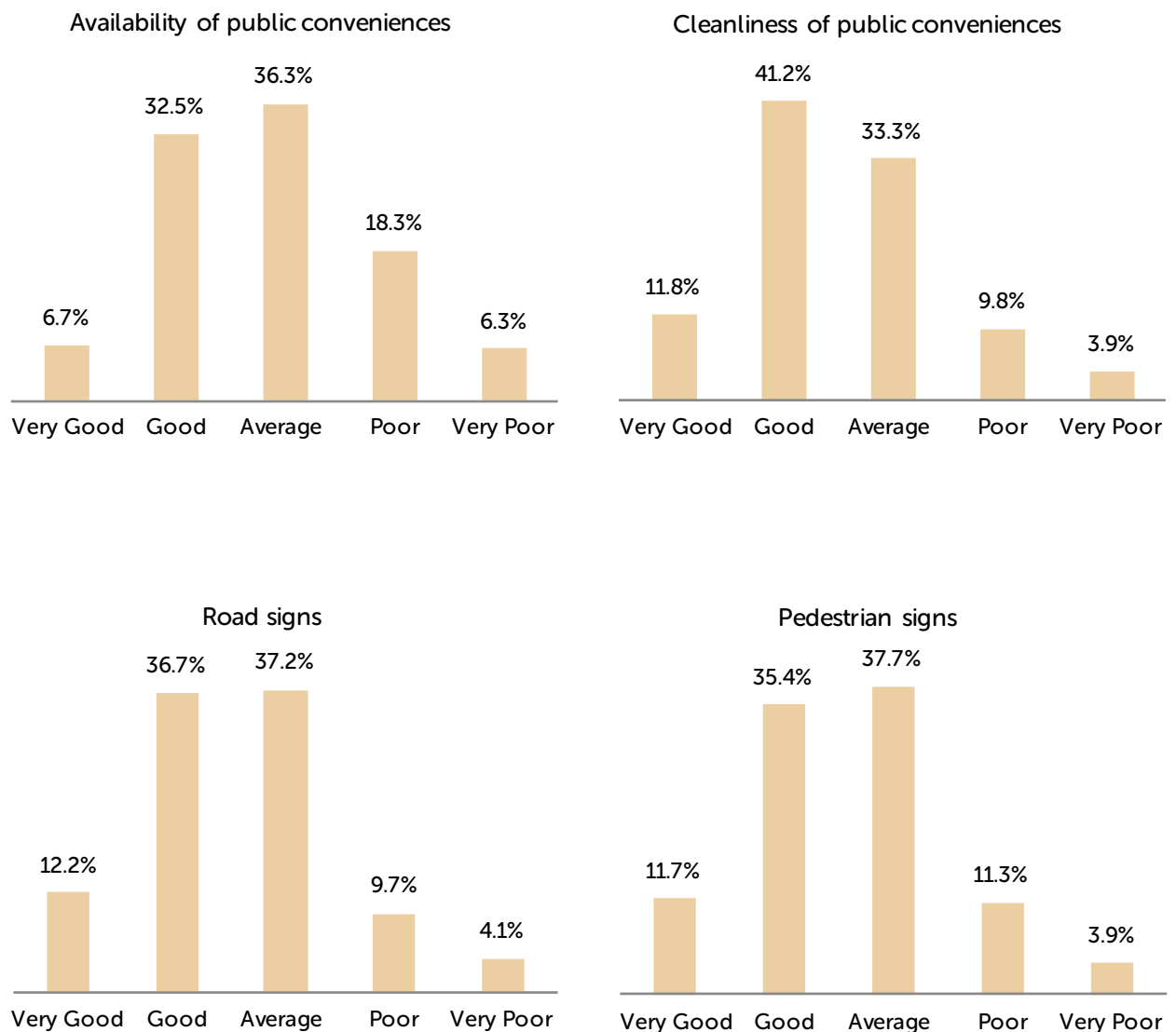
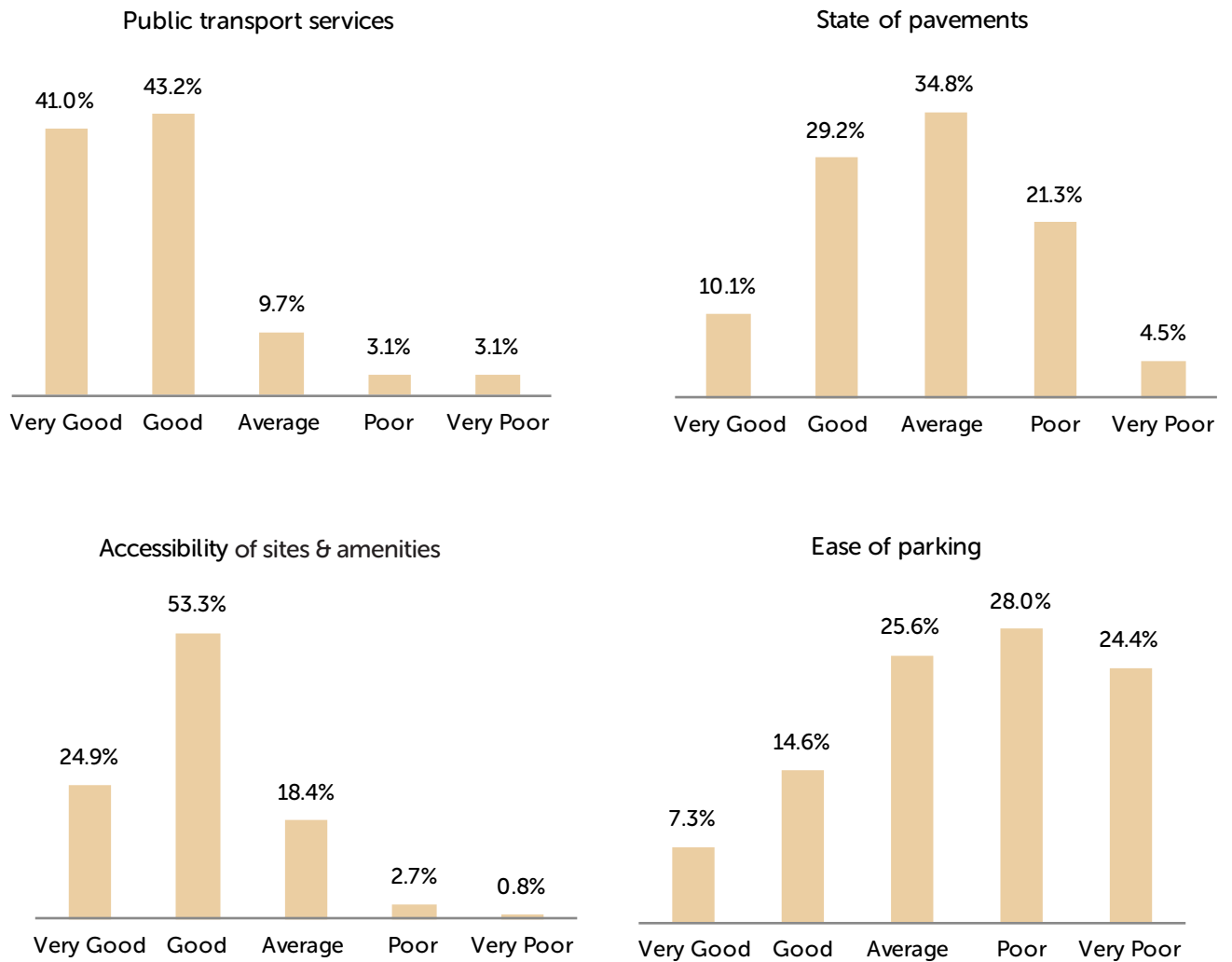
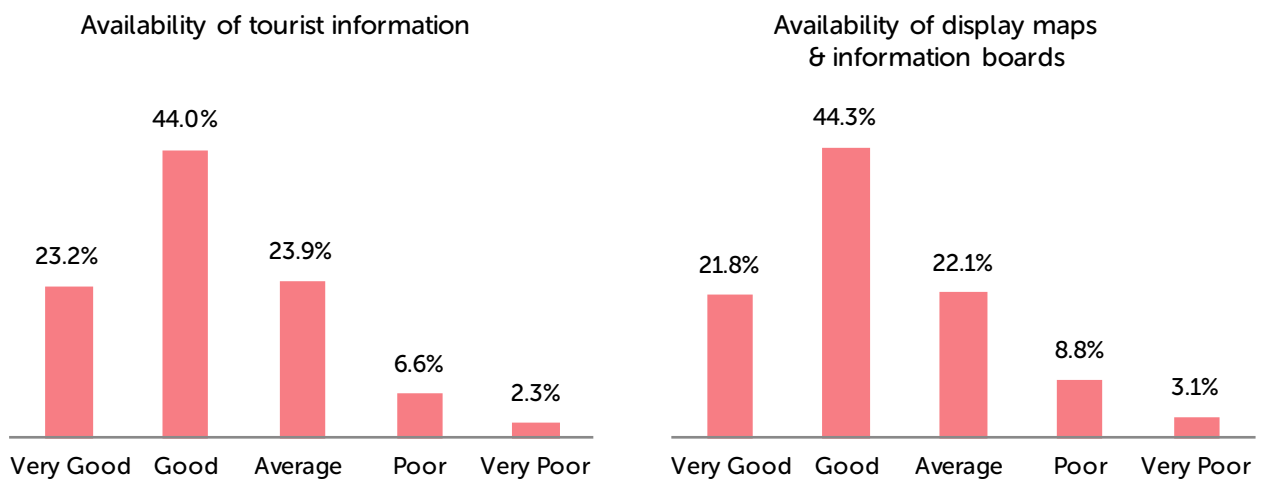


Figure 7 (continued): Evaluation of urban environment & amenities in Valletta



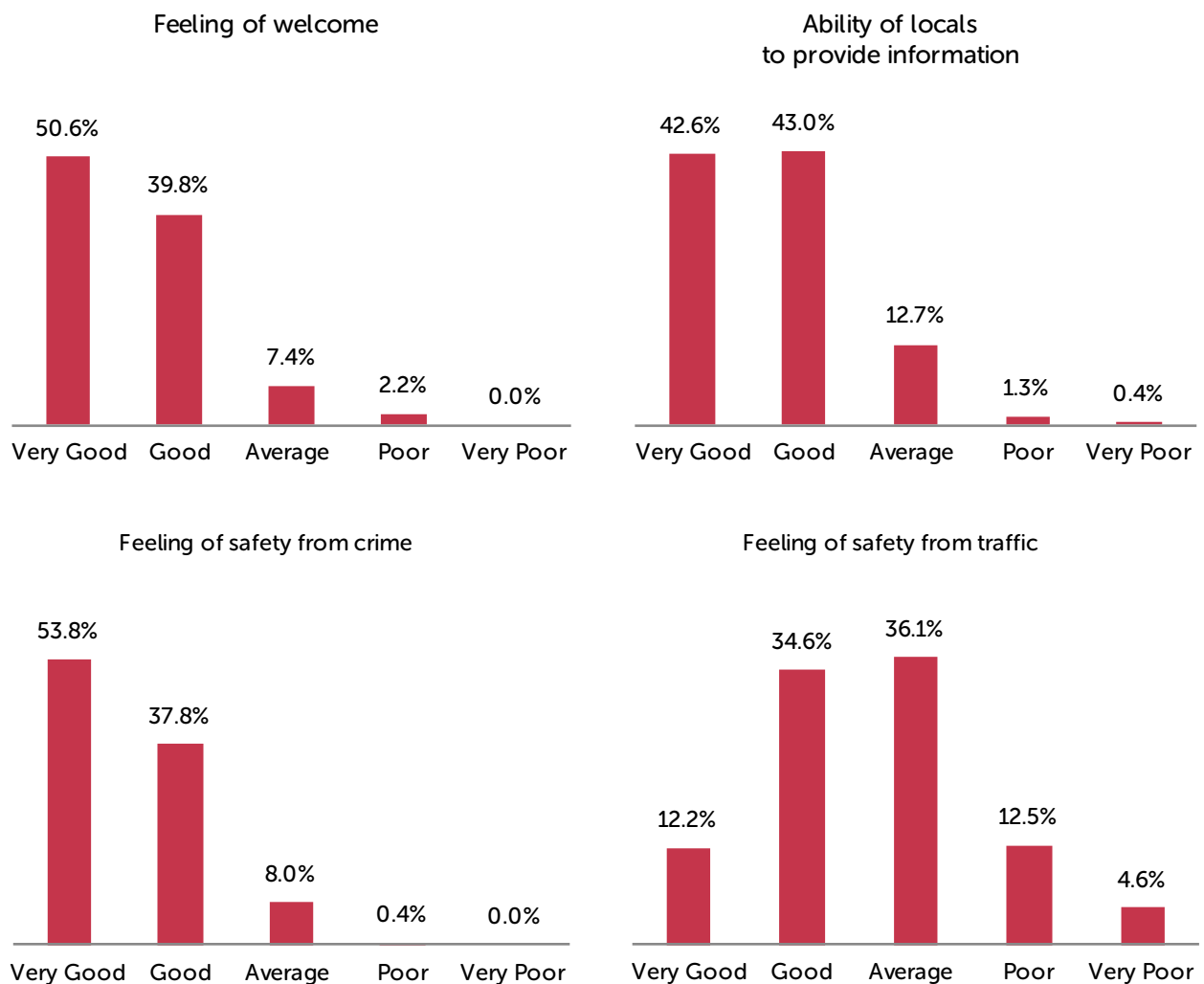
Sites and amenities in Valletta were considered to be easily accessible by most respondents, with 78.2% attributing an above average rating.

Figure 8: Evaluation of Tourist Information in Valletta



The long-term development of a tourism destination is very much reliant on a good relationship and constructive interaction between tourists and the local hosts. In this regard, tourists visiting Valletta expressed highly positive reactions: half of respondents rated the feeling of welcome in Valletta as 'very good', and a further 39.8% attributed a 'good' rating. Furthermore, the overwhelming majority also perceived the local community to be willing and capable of assisting them by providing information.

Figure 9: Overall Tourist Impressions of Valletta



Nine in ten 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.

Figure 9 (continued): Overall Tourist Impressions of Valletta

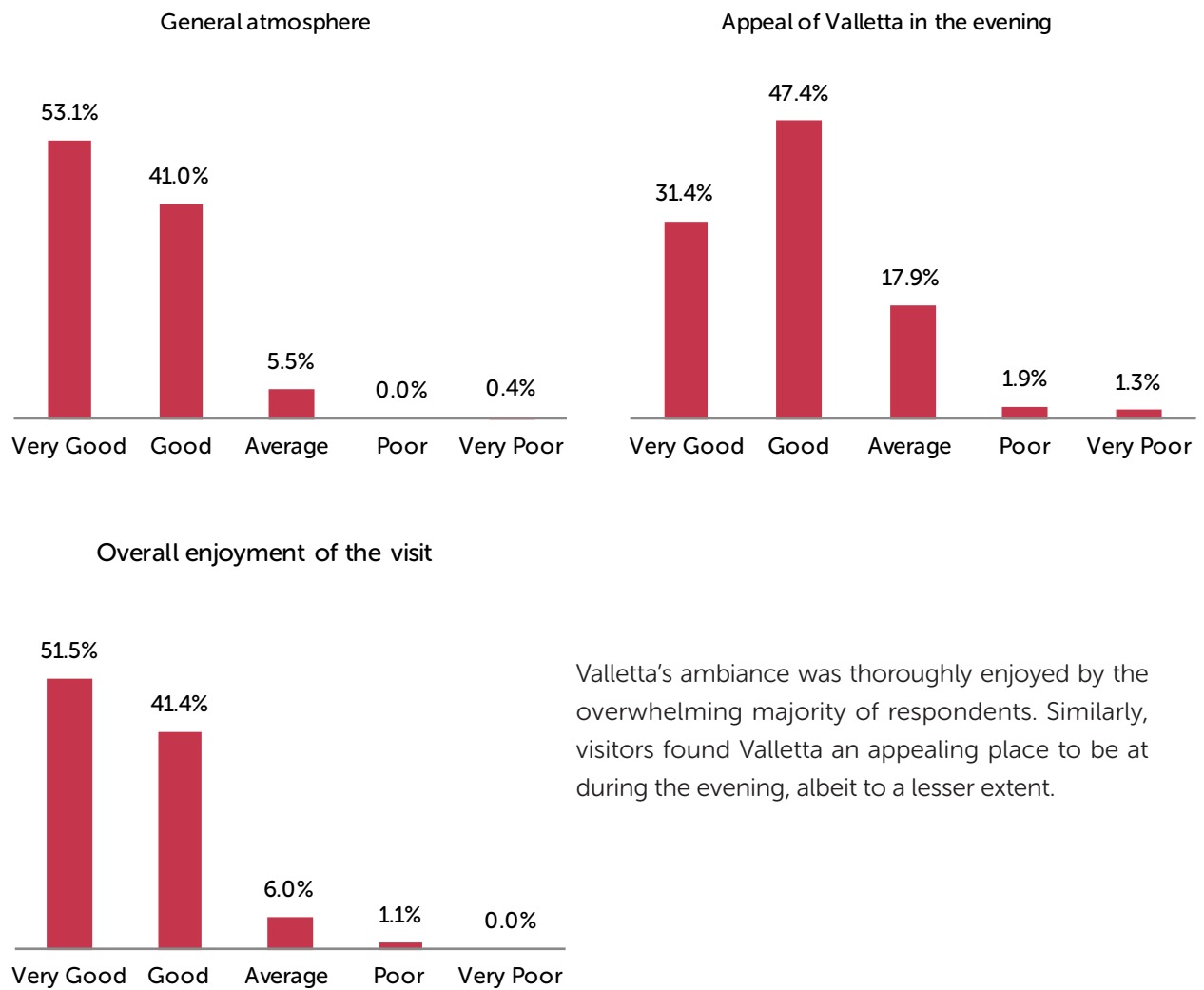


Figure 9 (continued): Overall Tourist Impressions of Valletta

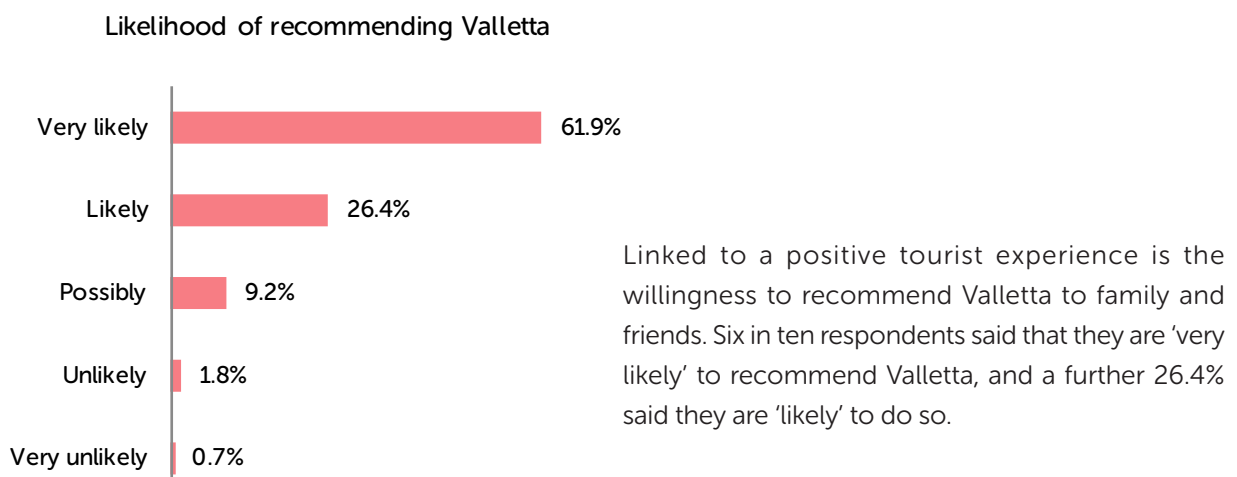
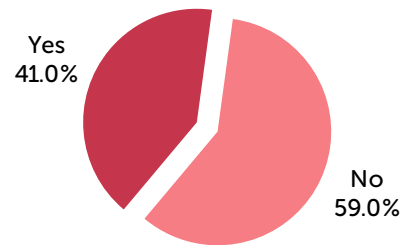


Figure 9 (continued): Overall Tourist Impressions of Valletta

Excessive urban development had a negative impact on experience



Ongoing construction works had a negative impact on experience



Survey results indicate that although tourist impressions of Valletta were largely positive, ongoing construction works within the city did have a negative impact on visitor experience; indeed, 41% answered in the affirmative. Excessive urban development also had a negative impact on tourist experience, albeit to a lower extent.

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 277 respondents, 244 indicated favourable aspects and 126 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.

Valletta: Positive Aspects – 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%

On the downside, the most mentioned problem areas related to overdevelopment and ongoing construction activity, lack of cleanliness and upkeep, and inadequate infrastructure for pedestrians touring the capital.

Valletta: Negative Aspects – 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%

FINDINGS

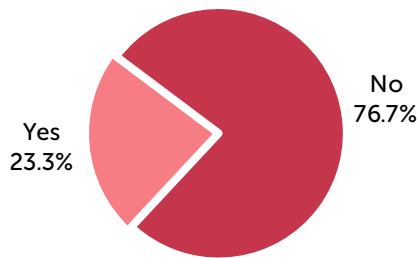
AWARENESS OF VALLETTA AS THE EUROPEAN CAPITAL OF CULTURE IN 2018

The findings presented hereunder are based on data collected during the period of February – October 2015. The sample comprises 717 respondents who completed the Valletta, Mdina, and Birgu-specific Locality Survey.

Out of the total sample, slightly less than one fourth of respondents (23.3%) were aware that Valletta will be the European Capital of Culture in 2018 prior their trip to Malta.

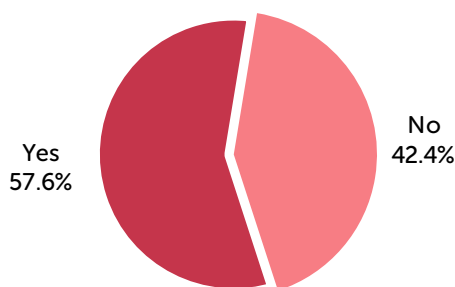
Figure 10: Awareness of Valletta 2018 prior to visit to Malta

Pre-trip awareness of Valletta ECOC 2018



Out of the total sample, slightly less than one fourth of respondents (23.3%) were aware that Valletta will be the European Capital of Culture in 2018 prior their trip to Malta.

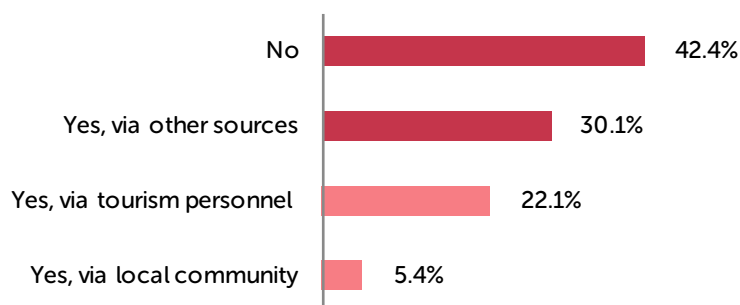
Awareness of Valletta ECOC 2018 during stay



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%.

Awareness of Valletta ECOC 2018 during stay



CONCLUSIONS

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 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.

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, nearly a fourth of survey participants was aware of the ECoC title prior their trip to Malta. Once visiting Malta, however, awareness levels increased to over half of respondents.

WAY FORWARD

The Locality Survey is being conducted on an ongoing basis, and once data for the year 2015 is compiled and analysed, it will serve as the base year for the Valletta 2018 Evaluation and Monitoring process. Data collection will continue in 2016 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**

Mariella Attard

ABSTRACT

The Market Profile Survey is 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. History and culture takes a prime role in the trip itinerary of tourists staying in accommodation in Valletta and its vicinity when 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.

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 during January and December 2015. Sample size is 530 respondents who resided in accommodation facilities in Valletta/ Floriana during their trip to Malta; this represents 7.4% of total sample collected during the year under review (N = 7,139).

The sample of 530 respondents is comprised of 300 residing in Valletta (56.6%) and 230 residing in Floriana (43.4%) during their stay in Malta.

Socio-Demographic Profile

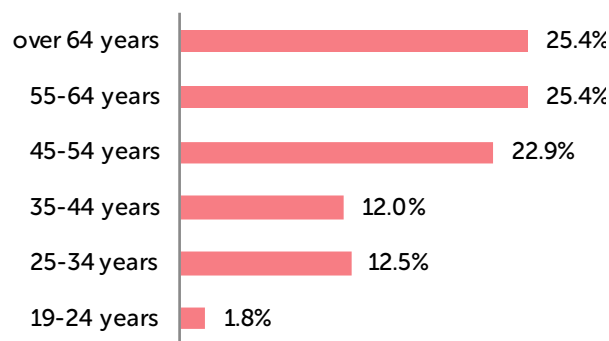
Country of Residence	
UK & Ireland	44.9%
France	17.2%
Germany	12.3%
Italy	7.2%
Belgium	4.9%
Nordic Countries	3.6%
Switzerland	3.4%
Austria	2.8%
Netherlands	2.3%
Spain	1.5%
Top Occupations	
Retired	29.9%
Professional	20.5%
Manager	17.4%
Office/Retail	14.7%

Respondents mainly came from the UK and Ireland (44.9%), France (17.2%), Germany (12.3%), and Italy (7.2%). There was a prevalence of female respondents, with a share of 57.7% compared to 42.3% male respondents.

Survey participants had an average age of 53 years. During the off-peak months (Autumn-Winter) respondents had an average age of 55 years, compared to 51 years for respondents visiting during the peak months (Spring-Summer).

Respondents were mostly retired, or in professional and managerial occupations. Average net monthly income was estimated at €3,443.

Figure 1: Age of respondents



Sources of Influence in Choosing to Visit Malta

Recommendation by friends/relatives ranked as the top source of influence in tourists' decision to choose Malta for their trip (37.5%). Internet ranked second (27.9%), closely followed by a positive experience during a previous visit to Malta (23.2%). Other information channels included travel guide books, newspaper and magazine articles, and recommendation by travel agent.

Sources of Influence (Multiple Response)	
Recommendation by friends/relatives	37.5%
Internet	27.9%
Previous visit	23.2%
Travel guide book	13.2%
Newspaper/magazine article	6.2%
Recommendation by travel agent	5.1%
TV programme	3.0%

Reasons for Choosing Malta

History and culture ranked as the prime reason for choosing Malta amongst tourists residing in Valletta/Floriana (53.6%). It is noteworthy that respondents opting to reside within the parameters of Valletta/Floriana expressed a higher interest in history and culture when compared to respondents residing in other parts of Malta (40.0%). Other important motivators for tourists staying in Valletta/Floriana were the favourable climate, novelty of a new destination to visit, and accessibility.

Prime Motivators for Choosing Malta (Multiple Response)	
Tourists residing in Valletta/Floriana	Tourists residing in other parts of Malta
History and culture (53.6%)	Agreeable climate (51.6%)
Agreeable climate (50.8%)	New place to go (47.4%)
New place to go (48.7%)	History and culture (40.0%)
Accessibility (21.7%)	Value for money (35.4%)
Value for money (21.3%)	Previous visit (25.6%)
Previous visit (21.1%)	Accessibility (18.8%)
Recommendation by friends/relatives (18.5%)	Recommendation by friends/relatives (18.6%)
English spoken widely (13.2%)	English spoken widely (19.6%)
Maltese hospitality (10.2%)	Maltese hospitality (14.2%)

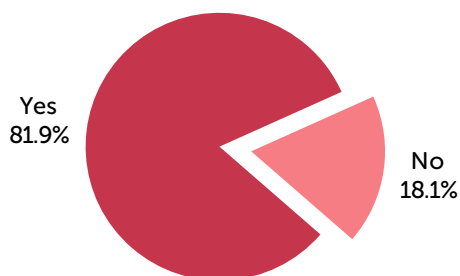
Trip Booking Arrangements

On organising their trip to Malta, the majority of respondents preferred to book travel components independently (68.3%). A further 22.2% opted for a holiday package, and the remaining 9.5% had a combination of packaged trip components and individually booked travel components.

Type of Booking	
Package	22.2%
Non-Package	68.3%
Partly Package / Partly Non-Package	9.5%

81.9% 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 (8.8%) and bought event tickets (2.8%) online.

Figure 2: Internet booking



Trip Components Booked via Internet	
Flights	96.1%
Accommodation	91.0%
Transfers	27.6%
Vehicle Hire	10.9%
Site / Attraction visits	8.8%
Event tickets	2.8%

Purpose of Visit to Malta

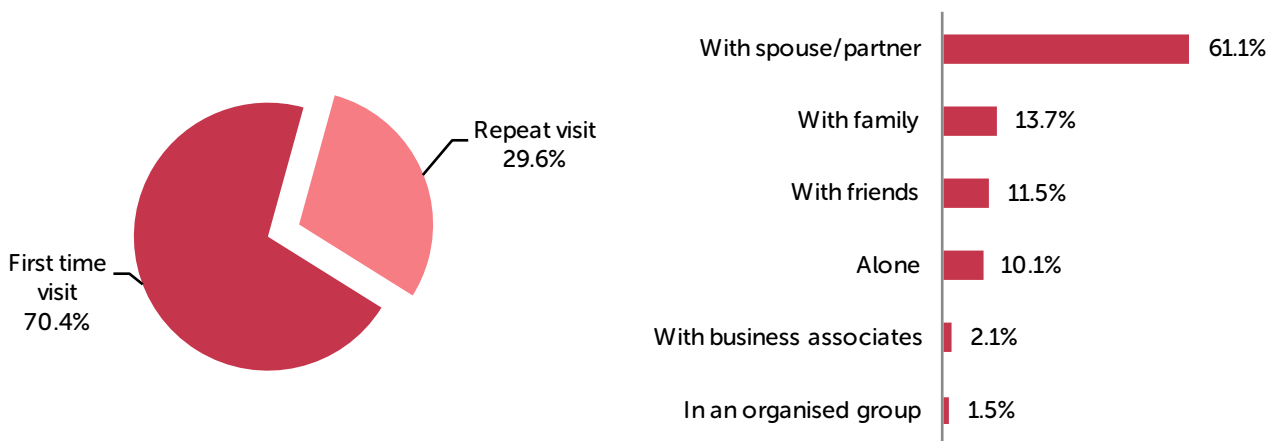
Vacation was the main purpose of visit for 79.4% of respondents. A number of respondents came to Malta specifically to attend a cultural event (2.1%).

Purpose of Visit	
Holiday / Vacation	79.4%
Business (incl. convention/conference/meeting)	7.4%
Visiting friends and relatives	3.0%
Attend cultural event	2.1%
Walking / Hiking	1.7%
Wedding / Honeymoon	1.1%
Other purpose	5.3%

Visit to Malta

Nearly 30% of respondents were on a repeat trip to Malta, whilst the remaining were visiting for the first time. Respondents were mainly travelling with their spouse/partner (61.1%). A further 25.2% were travelling with family members or friends. Solo travellers represented a share of 10.1%.

Figure 3: Visit to Malta and travelling party



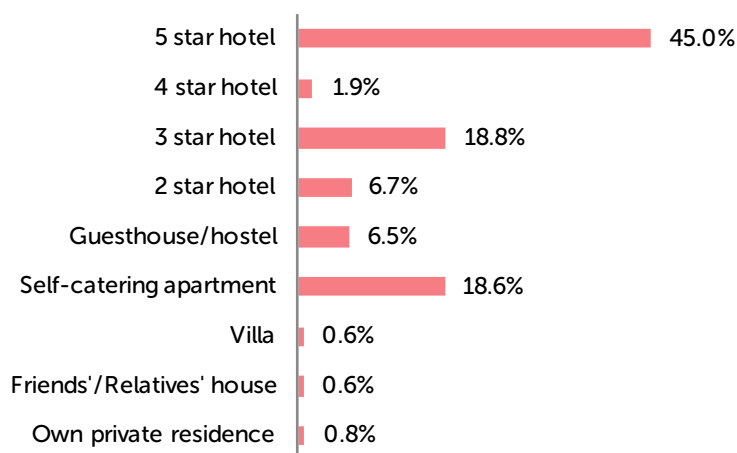
Accommodation in Valletta & Floriana

early eight in ten respondents opted for serviced accommodation, namely 5-star and 3-star hotels (45.0% and 18.8% respectively). The remaining 20.6% stayed in self-catering or private accommodation.

Bed and breakfast was the most preferred accommodation basis (62.3%), followed by self-catering (14.9%) and bed only (13.6%).

More specifically, tourists residing in accommodation within the parameters of Valletta, mainly stayed in 3-star hotels (33.6%), self-catering apartments (30.1%), 2-star hotels (12.0%) or guesthouses/hostels (11.6%). Amongst tourists residing in Floriana, 5-star hotel accommodation was the prevalent option (95.2%).

Figure 4: Type of accommodation



Activities Engaged in whilst in Malta

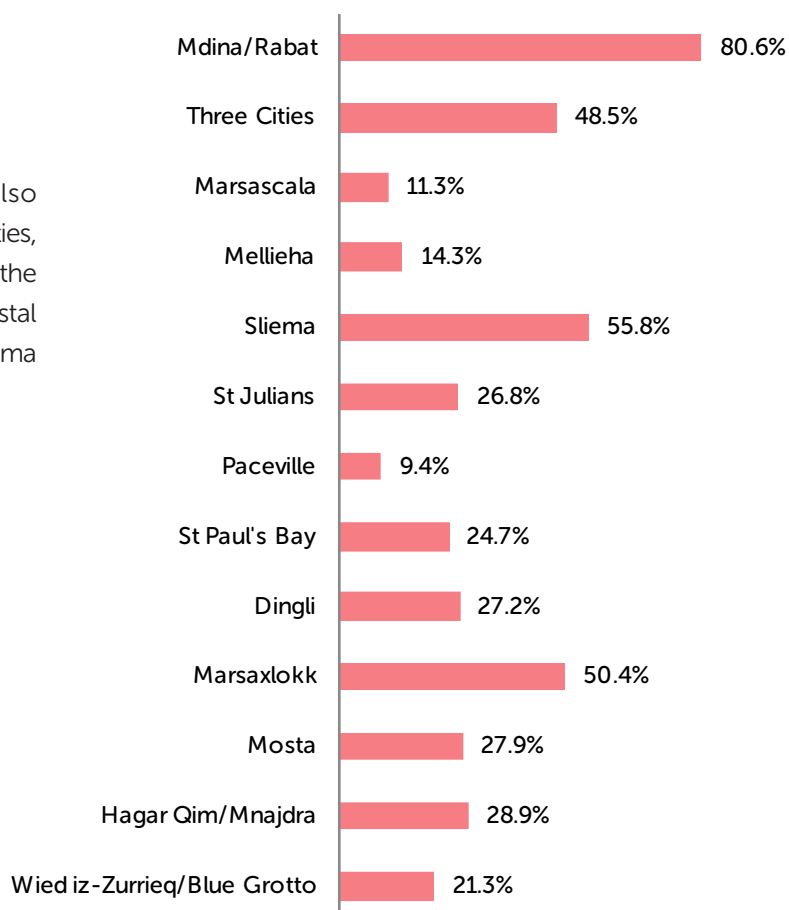
For the purposes of this project, comparisons were drawn between tourists residing in Valletta/Floriana and tourists residing in other parts of the Malta during their trip. It is worth noting that tourists residing in Valletta/Floriana exhibited a higher interest in cultural activities in comparison to tourists residing in other parts of Malta. Indeed, the former engaged in more visits to historical sites, museums, and churches. Similarly, there is a higher engagement in feasts, folk activities, festivals, and music/concert events, and other arts.

Cultural Activities engaged in:	%	%	Cultural Events attended:	%	%
Sightseeing	83.8	83.7	Theatrical performance	2.8	1.4
Visit historical sites	83.6	77.7	Dance	1.9	1.3
Visit museums	71.5	47.5	Opera	1.1	0.6
Visit churches	80.8	67.3	Music/concert	11.3	4.6
Visit arts/crafts sites	20.4	28.2	Festas/folk/festival	12.5	9.1
Visit local produce sites	10.4	17.7	Visual arts	4.2	2.4
Recreational Activities engaged in:	%	%			
Shopping	48.1	55.7			
Dine at restaurants	82.1	67.6			

Localities Visited During Stay in Malta

Tourists residing in Valletta/Floriana also expressed an interest in other historic localities, and have visited Mdina/Rabat (80.6%) and the Three Cities (48.5%) during their stay. Coastal areas were also highly visited, particularly Sliema (55.8%) and Marsaxlokk (50.4%).

Figure 5: Localities visited



Recommending Malta and Intention to Visit Again

The overwhelming majority said that they would happily recommend Malta to friends and relatives (95.5%), namely for:

- its historical/cultural offer (including architecture, museums, and heritage sites);
- the locals' hospitality;
- Malta's beauty and attractiveness;
- the enjoyable climate; and
- the diverse offer of things to see and do whilst in Malta.

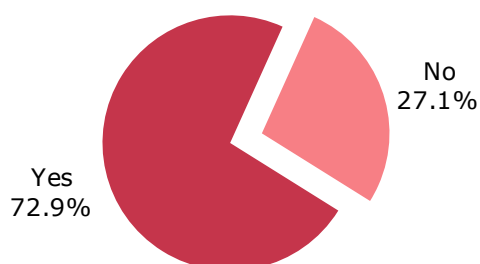
Figure 6: Willingness to recommend Malta



Top reasons for recommending Malta:	
History and culture (incl. architecture, museums, heritage sites)	29.7%
Hospitality of the local people	22.0%
Malta's beauty / attractiveness	15.0%
Good climate	11.8%
Variety of things to see and do	8.1%
Value for money, affordable	4.7%
Scenery, landscape	4.5%
Relaxing and peaceful	4.2%

Following a positive experience in Malta, a substantial 72.9% expressed an intention to re-visit Malta in the near future, particularly in the next one to two years (39.5%) or in three to four years' time (30.4%)

Figure 7: Intention to visit Malta again



Intention to visit Malta again in:	
Less than 1 year	12.0%
In 1 to 2 years	39.5%
In 3 to 4 years	30.4%
In 5 years or more	18.1%

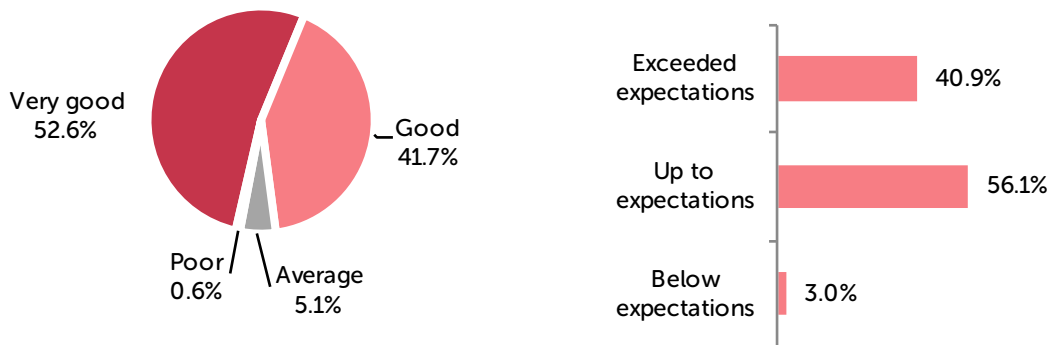
Overall Impressions

An important aspect of the tourist experience is the positive interaction with the host community. In this regard, 94.3% of survey participants were positively impressed by the local people's hospitality. Furthermore, most respondents expressed satisfaction about their overall experience in Malta, with 56.1% saying that Malta met their expectations and a further 40.9% noting that their expectations were exceeded.

CONCLUSIONS

A key aspect that emerges from the foregoing exercise is that history and culture takes a prime role in the trip itinerary of tourists opting to reside in accommodation in Valletta and its vicinity when 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.

Figure 8: Hospitality of locals and overall experience



WAY FORWARD

The Market Profile Survey is being carried out on a continuous basis. The data collected during 2015 will serve as the base year for the Valletta 2018 Evaluation and Monitoring process. Data collection is continuing in 2016 through to 2019, and the identified indicators will be monitored for the duration of these set timeframes.

The current Market Profile Survey has recently 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

The findings of these studies allow us to develop a clearer profile of the type of tourist who visits Malta, and their engagement with cultural activity – and Valletta 2018 in particular – throughout their stay.

These studies show a relatively high level of awareness of Valletta's title as European Capital of Culture 2018 amongst visitors, with this rate increasing further throughout their stay. Furthermore, there are clear patterns that can be drawn between a visitor's choice of accommodation and their disposition towards attending or visiting cultural attractions. Valletta and its immediate environs, more than any other locality in the Maltese islands, is increasingly associated with culture



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