THE IMPACTS OF VALLETTA 2018

Initial research findings 2015

EUROPEAN CAPITAL OF CULTURE

Malta Fashion Week 2015 - Noel Fenech

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INTRODUCTION

This document presents the initial findings from the Valletta 2018 Evaluation & Monitoring research, which will run for the period 2015-2019.

The overall objectives of the Evaluation & Monitoring process are to:

1. Provide an accountable and detailed analysis of the project implementation;
2. Measure the impacts of Valletta 2018 allowing for interventions in project implementation as required;
3. Collect data to be able to communicate the impacts of the ECoC project in Malta to relevant stakeholders;
4. Ensure availability of comparable studies to allow for medium and long term evaluation;
5. Provide a platform for the next ECoC in Malta, 2031.

The Foundation has set up an Evaluation & Monitoring Steering Committee composed of a number of entities and individual researchers who will be conducting research of a qualitative and quantitative nature.

The Valletta 2018 Foundation Evaluation & Monitoring Research Plan is structured around 5 research themes. Research themes, objectives and keywords are found in the table below.

RESEARCH THEME	OBJECTIVES	KEYWORDS
Cultural and territorial vibrancy	To evaluate the success of the Valletta 2018 cultural programme and the change in cultural participation	Cultural programme; cultural participation; European identity
Governance and finance	To understand the investment and management in Valletta 2018 and the related impact on Malta's creative sector	Investment; creative industries; management
Community inclusion and space	To assess the impact of Valletta 2018 and of cultural and infrastructural regeneration projects on various community groups	Involvement, accessibility; cultural infrastructure; regeneration
The tourist experience	To evaluate the changes in visitor profile, tourist expenditure and visitor motivation to travel as a result of Valletta 2018	Visitor expenditure; tourist demographics; visitor motivation
The Valletta brand	To understand the success of the Valletta 2018 communication strategy within different communities	Image; brand; communication

THEME 1 - Cultural and Territorial Vibrancy

Valletta Participation Survey

National Statistics Office

The Valletta Participation Survey (VPS) is a sample survey with the objective of providing an overview of the main characteristics associated with attendance to cultural events in Valletta and perceptions of the city.

Methodology: The VPS has been carried out twice to date. The first wave of data collection was carried out during the last quarter of 2014 and targeted 1,500 individuals, aged 16 years and over. The second wave of data collection was launched in November 2015 and targeted a sample of 1,000 individuals. For both surveys, the concept of over-sampling was used in the part which concerned Valletta to enable the derivation of good quality statistics specifically for this locality. Data was collected through Computer Assisted Telephone Interviewing (CATI).

Results to date: The results of the first VPS provides insights into how Valletta residents, as well as persons who live outside the city, interacted with the capital. The results of the survey indicate that Valletta residents maintain a strong quotidian relationship with the city and carry out many of their daily activities within the city itself. Non-Valletta residents have a more sporadic relationship with the city. Culture and entertainment ranked relatively low in their list of reasons for visiting Valletta.

Large-scale, city-wide activities (such as Notte Bianca and Carnival) are the most widely-attended cultural activities within Valletta, followed by visits to museums and historical sites. The various performing and visual arts disciplines all reported similar attendance figures (between 11-16% attended at least once), except for dance, which is the least popular form of cultural activity listed. The most significant obstacle in increasing audiences for cultural activities is a general lack of interest (38%) for not attending. However, a significant portion of respondents registered the positive atmosphere and sense of unity as their main motivation to attend. An overwhelming number of respondents are in general agreement that Valletta is changing for the better.

TV is the medium most widely used to obtain information about Valletta 2018, followed by social media. Valletta 2018 is still seen as an event which will primarily benefit the tourism industry, followed by Valletta's business community and international image and visibility. Valletta 2018 is likely to increase participation in cultural activities over the upcoming years, particularly amongst Valletta residents and residents of the Northern Harbour region[1].

Way forward: The results of the second VPS carried in November 2015 are expected in February 2016. The VPS is expected to be carried out twice every year until 2019.

[1] **Northern Harbour** - Ħal Qormi, Birkirkara, Gżira, Ħamrun, Msida, Pembroke, Tal-Pieta' St Julian's, San Ġwann, Santa Venera, Tas-Sliema, Swieqi, Ta' Xbiex.

A Comprehensive Analysis of the Valletta 2018 Cultural Programme

Daniela Vella

New Year's Eve 2016 - Chris Mangion

The aims of this study are (i) to analyse how the cultural programme is developed, devised and implemented; (ii) to explore the factors that influence the creation of the cultural programme events and projects; and (iii) to track the long-term development of the cultural programme and the projects' effectiveness in terms of cultural participation and European collaboration.

Methodology: A mixed method approach is being used to reflect the multidimensional dynamics of the European Capital of Culture (ECOC) cultural programme. This qualitative research study takes a 3-pronged approach: (i) an institutional and industry level analysis; (ii) a mapping and surveying of projects to be fully produced by the Valletta 2018 Foundation; and (iii) expert focus group studies. In-depth semi-structured interviews were carried out to gain insights from key informants involved in culture programming.

Results to date: The analysis of written documentation and Valletta 2018 publications reveal consistency in prioritising quality and innovation, with the programme being mostly based on contemporary projects. The Foundation looks at developing projects which will allow for legacy, through artistic collaboration at both national and European level. An initial analysis of 33 projects took place in 2015. Results show that 44% of projects are based in Valletta, 29% of projects are based throughout the Maltese Islands and 15% of projects are based in a specific locality in the Maltese Islands. The main focus of projects is 'community', with music and film/audio-visual projects being the most frequent genres. Literature and theatre are the less frequent genres for projects analysed during 2015. There was a strong emphasis on educational projects, projects involving the migrant communities and capacity building. Further results show a focus on flexibility and continuous refinement, to further allow for audience development, European collaboration and legacy.

Way forward: This research will look at a more detailed analysis of projects being developed and planned in 2018. Further interviews and communication both with inside key informants and external experts and respondents will take place. A focus group is planned for the first quarter of 2016 and the surveying of individual projects is also being planned.

The Impact of Valletta 2018 on the European Identity of the Maltese Population

Dr Marcello Carammia

Malta Arts Festival 2015 - Rene Reseguard

The aim of this project is to analyse the impact of the Valletta 2018 Programme on the European identity of Maltese society.

Methodology: This study applies a mixed methodology based on both quantitative and qualitative techniques. A panel study observing a sample of 1000 participants between 2015 and 2019 will be carried out, with the baseline study taking place over the end of 2015 and beginning of 2016. This quantitative data collection will also take place in the final year of the study, while interviews and focus groups will be carried out between 2016 and 2018 to obtain a deeper insight into the nature, degree, and causes of identity change (if any).

Findings: The preliminary findings from the initial data collection indicate that there seems to be a stronger feeling of attachment among the Maltese relative to their European counterparts not only to their town/village and country but also to Europe itself. More Maltese than Europeans tend to admit that being European matters a lot to them. In terms of influence, they feel that their voice counts a lot in the EU, relative to their European counterparts, and are more knowledgeable about their rights. The Maltese tend to trust the European Commission and the European Parliament more than their European counterparts. They also tend to trust Maltese Parliament and National Government to a higher degree than EU citizens trust their own. On the other hand, active cultural participation in Malta tends to be lower than in EU countries in several domains, including in the use of the internet for cultural purposes.

Way forward: Following the initial wave of desk research and quantitative data collection throughout 2015 and early 2016, further analysis on the data collected will be carried out. Focus group sessions and interviews with participants will take place during 2017 and 2018.

THEME 2 - Governance & Finance

Valletta Green Festival - Cedric Vella

The Economics of Cultural and Creative Industries in Malta

Economic Policy Department

The objective of this study is to assess, on a continuous basis, the situation of Malta's Cultural and Creative Industries (CCIs). The cultural and creative industries have already been identified as one of the growth potential industries within the Maltese economy.

Methodology: The report includes a quantitative analysis of CCIs in Malta, with a specific focus on the design sector. Both studies are analysed through input/output modelling of the respective sector.

Results to date: The analysis of the CCIs shows that there is a relatively strong value added and income multiplier effect and a weak multiplier effect on employment. Film, video and television production, and publishing have the strongest multiplier effect. The financial, legal, audit, ICT, and consultancy sectors provide the major inputs to the industry and the major outputs provided by the CCIs are to the sector itself. The analysis on design activity in Malta shows that design is directly proportional to the size of companies - fixed costs may hamper smaller firms in engaging in design activity in Malta, whereas as companies grow, variable costs make design activity more profitable and competitive. However, as firms grow further, they face new issues related to foreign competition. The design sector provides relatively strong value added and moderate income and employment multipliers. The financial, auditing, IT, and consultancy sectors constitute major inputs in the design process and the Valletta Design Cluster (VDC) should incorporate these elements whilst providing easy access to the main users of design, namely construction and real estate. The report also shows that there seems to be no link between the manufacturing and design sectors, to the detriment of both.

Way forward: EPD is considering alternative data sources to obtain data which is vital to the monitoring of the CCIs in Malta and the impact of policies in this area. The Structural Business Survey will identify the number of enterprises which engage in design paving the way for the launch of the Design Survey in 2016. EPD will be undertaking training in Cost-Benefit Analysis work in order to carry out a substantial economic project analyses at a micro level for future deliverables.

Creating a Career in Cultural and Creative Industries

Employment and Training Corporation

Cultural Mapping: Debating Spaces & Places conference - Elisa von Brockdorff

Quantification of employment figures in CCIs and the relation between education and employment in the industry.

Methodology: A quantitative approach has been adopted, including a statistical analysis of employment indicators and figures, and the development of an employability index.

Results to date: Full-Time Employment (FTE) in the CCIs increased by approximately 10.2% whilst Part-Time Employment (PTE) rose by 6% over the period of 2014 quarter one to 2015 quarter 2. As at the end of June 2015, 93% of FTE in CCIs was in the private sector, whilst the remaining 7% were employed in the public sector. Total employment in the CCIs as at the end of June 2015 amounted to 10,991 persons, or 5.35% of employment in the total economy.

Way forward: An Employability Index Report was published in October 2015; an extraction of the results relating to CCIs will be analysed in detail during the first quarter of 2016. A continuous statistical analysis will continue during the coming years up to 2019 both on a quarterly as well as on an annual basis. The National Commission for Further and Higher Education (NCFHE), ETC and Malta Enterprise are currently developing a Skills Survey which will be launched in 2016. Once the survey is conducted, the results relating to CCIs will also be extracted.

THEME 3 - Community Inclusion & Space

Community Inclusion and Accessibility in Valletta 2018

Michael Deguara

This study looks at the factors which may help or hinder social participation in Valletta 2018, including accessibility issues.[2]

Methodology: The local population has been subdivided into six community groups based on criteria of 'a sense-of-belonging' to Valletta and patterns of residence. A group of persons with restricted accessibility have also been included to assist in investigating accessibility issues. The six community groups covered by this study are mainly based around different forms of Beltin[3], but not exclusively. These groups are: (i) persons who consider themselves as being from Valletta, and who reside in Valletta; (ii) persons who consider themselves as being from Valletta, but do not reside in Valletta; (iii) persons who do not consider themselves as being from Valletta, but reside in Valletta; (iv) persons who are residents of the Inner Harbour (also defined as the 'Greater Valletta' area); (v) Maltese people in general, who commute to Valletta with different levels of regularity; and, (vi) Maltese people who have restricted accessibility[4].

Results to date: Preliminary observations show that Valletta is a place which has multiple layers of meaning to people from different backgrounds. Attitudes towards Valletta vary from one community group to another, ranging from the positive injection of investment through the development of boutique hotels to concerns over parking and accessibility, and the rise of property prices. Results from the study reported a good level of awareness of Valletta 2018, but the need to further clarify the aims and events of the project. This study also concludes that Valletta 2018 needs to ensure continuous social engagement, consultation and direct involvement of the different community groups. Other relevant findings include the need to develop a clear social strategy, to improve accessibility within the city, where possible, and to remain conscious of the issues related to gentrification and monumentalisation of the city.

Way forward: The findings will eventually be compared with the statistical information generated through the Valletta Participation Survey, with a particular view as to whether the qualitative data can shed light on trends indicated by the quantitative data and vice versa.

[2] In accordance with the Terms of Reference, the research into this area should seek to measure accessibility on a number of levels, namely: (i) physical; (ii) social; (iii) geographical; (iv) financial; (v) linguistic; and (vi) intellectual accessibility.

[3] The term derives from il-Belt, "the City", as Valletta is generally referred to in Maltese, and roughly translatable as people from Valletta.

Assessing the relationship between community inclusion and space through Valletta 2018 cultural infrastructural projects

Dr Antoine Zammit

This research is concerned with the assessment of the spatial and social impact of cultural infrastructure, in order to gauge the manner with which they may result in broader culture-led urban regeneration within specific Valletta neighbourhoods.

Methodology: Four areas are studied in depth: (i) The Biċċerija (upcoming Valletta Design Cluster) and its surrounding neighbourhood; (ii) the entire extent of Strait Street; (iii) Pjazza de Valette/MUŻA and its immediate surroundings; (iv) the area surrounding the covered market (Is-Suq tal-Belt), along both Merchants Street and St Paul's Street. Data is being collected through: (i) focus groups; (ii) urban design temporal analysis; (iii) key stakeholder interviews; and (iv) participant observation. Follow up will then be conducted through Participatory Planning Geographic Information Systems (PPGIS) workshops.

Results to date: An in-depth analysis of the sites has been carried out and an inventory of 347 relevant properties across the four sites has been created (121 properties in the Biċċerija area, 66 properties along Strait Street, 47 properties within the neighbourhood surrounding MUŻA and 113 properties in the area around the Covered Market). A series of 109 site visits has led to the identification of significant data patterns which are currently being collated and categorised.

The participant observation revealed that the MUŻA/Pjazza de Valette area mainly hosts people and users interaction, whereas the Biċċerija, is-Suq and Strait Street, mainly host sensoral and environmental influences. On the other hand, MUŻA/Pjazza de Valette, Biċċerija and is-Suq host less vehicular and pedestrian interface, whereas Strait Street hosts less people and users interaction.

Way forward: Continuation of ongoing data collection and analysis together with the urban design temporal analysis and key stakeholder interviews and focus groups.

Science in the City 2014 - Jonathan Borg

THEME 4 - The Tourist Experience

Valletta Green Festival - Chris Mangion

Market Profile Survey

Malta Tourism Authority

The Market Profile Survey is a tourist profiling exercise with the objective of obtaining insights into tourist behaviour, levels of satisfaction with elements of Malta's tourism offer, and overall tourist experience.

Methodology: The Market Profile Survey is an ongoing exercise. Self-completed questionnaires are distributed to tourists on their arrival at the Malta International Airport (MIA). The target audience comprises tourists residing in Malta's main source tourism markets, mainly UK & Ireland, Italy, Germany, France and Spain.

Findings: For the period January – June 2015, 8.2% of total respondents (N=3646), resided in accommodation in Valletta/Floriana (57.3% resided in Valletta, 42.7% resided in Floriana). In terms of trip motivations, history and culture ranks as the prime reason for choosing Malta amongst tourists residing in Valletta/Floriana. Tourists residing in Valletta/Floriana exhibit a higher interest in cultural activities in comparison to tourists opting to reside in other parts of Malta: the former engage in more visits to museums, churches, and historical sites. Similarly, there is a higher engagement in events such as music/concerts, and feasts/folk/festivals.

Way forward: Data collection is ongoing and will continue in 2016.

Locality Survey

Malta Tourism Authority

The Locality Survey aims to gauge tourist experience in designted tourist localities. The survey enables the profiling of tourists visiting Valletta and their evaluation of the city's product offer and gives insight into tourists' awareness of Valletta as ECoC and related levels of cultural participation.

Methodology: The Locality Survey is an ongoing research exercise. Questionnaires are distributed to tourists of any nationality who are visiting or staying in designated heritage (Valletta, Mdina, Birgu) and coastal (Sliema, St Julian's, St Paul's Bay, Mellieha) localities. The self-administered questionnaire asks tourists to evaluate of the physical environment in the locality they resided during their sojourn as well as the quality of the services offered.

Results to date: For the period of February – October 2015, there was a sample of 717 respondents who completed the questionnaires. Out of the total sample, 23.3% were aware that Valletta will be the European Capital of Culture in 2018 prior to their visit to Malta, and over half (57.6%) of the respondents who were unaware of Valletta 2018 prior to their visit were made aware during their stay. 2.6% of respondents specifically indicated Valletta 2018 as one of their main motivations for choosing to visit Malta. Overall, 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. 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.

Way forward: Data collection relating to the Locality Survey is ongoing and will continue in 2016.

Notte Bianca - Chris Mangion

THEME 5 - The Valletta Brand

Recycled Percussion 2015 - Chris Mangion

Audiences' experiences of the Valletta 2018 brand

Dr Emanuel Said

This study aims to offer an insight into how audiences engage with the different forms of communication forming part of the Valletta 2018 communications programme. Building upon the findings of the Valletta Participation Survey, this research will investigate the active and passive audience engagement with the Valletta 2018 brand.

Methodology: A mixed methods approach involving real time experience tracking (Baxendale et al., 2015; Macdonald et al., 2012) subsequent to exploratory focus group discussions about audiences perceptions on encounters and experiences with the Valletta 2018 brand. The real time experience tracking data collection will include a sample size of 400 participants.

Results to date: The custom-made interactive application which will be used for real time experience tracking, is currently in the process of testing and envisaged to be ready for data collection in quarter 2 2016.

Way forward: Exploratory focus group discussions to establish how audiences engage with different Valletta 2018 brand touchpoints will be held in the first quarter of 2016. The RET app will be launched in the first quarter of 2016 and data collection through this app will take place between May and June 2016.

Concluding remarks

The Evaluation and Monitoring process started in 2015 and will conclude in 2019. This is a long-term process which will help the Valletta 2018 Foundation, and the cultural sector as a whole, better understand the impacts of the prestigious title of European Capital of Culture. This research process is a valuable tool in terms of the implementation of the ECoC and in ensuring that the Foundation is in line with the needs and motivations of local communities and cultural practitioners. The Foundation will be further reviewing the results of the first year of the research in order to address the challenges within the cultural sector and continue developing a strong and inclusive cultural programme for 2018.

Strada Stretta: Ugly Beauty - Chris Mangion

valletta2018.org

Front and back cover image:
Qatt ma Ninsa Gozo 2015 - Inigo Taylor

EUROPEAN CAPITAL OF CULTURE

MALTA GOZO COMINO

NATIONAL STATISTICS OFFICE · MALTA