

SUMMARY REPORT 2018 2018 Research

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INTRODUCTION

The Valletta 2018 Foundation's Evaluation and Monitoring plan enabled the Foundation to assess the impacts of the European Capital of Culture title in Malta and all the activity that took place throughout the year and in the years preceding it.

The Valletta 2018 Foundation Evaluation & Monitoring Research Plan was structured around 5 research themes, with each theme including separate studies.

In order to carry out this research, an Evaluation & Monitoring Steering Committee was set up with the task of monitoring and evaluating the impacts of Valletta as an ECoC. The Steering Committee was composed of four public entities and five researchers who conducted research of a quantitative and qualitative manner. The process was coordinated and managed by the Research Department of the Valletta 2018 Foundation.

The research process ran for the period 2015-2018, with baseline studies carried out in 2015.

This booklet presents snippets of each study, outlining the main methodologies used by each researcher and highlighting some of the more salient findings. Each study is accompanied by a full report, revealing more findings and examining issues in further depth. These reports will be published and made available by the Valletta 2018 Foundation.

Research Theme	Objectives	Research Study	Researcher/Entity
Cultural & Territorial Vibrancy	To evaluate the success of the Valletta 2018 in encouraging cultural participation by the general public and different community group	Valletta Participation Survey	National Statistics Office
		A Comprehensive Analysis of the Valletta 2018 Programme	Daniela Blagojevic Vella
		The Impact of Valletta 2018 on the European Identity of the Maltese Population	Dr Marcello Carammia & Dr Marie Briguglio
Governance & Finance	To understand the investment and management in Valletta 2018 and the related impact on Malta's creative sector	Creative Economy Report: 2018 Update	Economic Policy Department
		Creating a Career in the Cultural & Creative Industries	JobsPlus
Community Inclusion & Space	To assess the impact of Valletta 2018 and of cultural and infrastructural regeneration projects on various community groups	Community Inclusion & Accessibility in Valletta 2018	Michael Deguara
		Assessing the relationship between community inclusion and space through Valletta 2018 cultural infrastructural projects	Dr Antoine Zammit
The Tourist Experience	To evaluate the changes in visitor profile, tourist expenditure and visitor motivation to travel as a result of Valletta 2018	The impact of Valletta 2018 on the tourism sector	Malta Tourism Authority
The Valletta Brand	To understand the success of the Valletta 2018 communications strategy across different communities	Audiences' Experiences of the Valletta 2018 Brand	Dr Emanuel Said
		Media Analytics	Valletta 2018 Foundation

c. Francesca Vella

CULTURAL & TERRITORIAL VIBRANCY

VALLETTA PARTICIPATION SURVEY National Statistics Office

Objectives

The scope of the Valletta Participation Survey (VPS) is to measure the level of participation and interest of the population of Malta in cultural activities organised in Valletta, many of which are organised as part of Valletta 2018. This survey also provides information on the prevailing perceptions regarding Valletta as a European Capital of Culture, as well as draws feedback on various issues concerning the strategy.

The VPS was carried out across six waves over the span of five years, with two surveys carried out in 2018, one in May and one in November.

Methodology

The target population of the VPS consists of persons aged 16 years and over who are living in households in the Maltese Islands. All localities in Malta and Gozo are equally covered in this survey, (sample size of 1,000) with the exception of Valletta, where over-sampling was implemented so as to ensure an adequate representation of findings in the final sample. Consistent with the previous waves of the VPS, the November 2018 data collection was carried out by means of telephone interviewing (CATI). The response rate for the November 2018 survey was 81% which is exactly the same as the response rate for the May 2018 survey.

Results

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These six waves of the VPS allow for the comparison of data across multiple years, identifying changes/developments in trends or patterns of the respondents. For the majority of the variables, there were no drastic changes in the trends or behaviours throughout the years. However, there are a number of results which must be highlighted, such as the increase in the attendance rates for cinema/films and other projected artistic performances and dance activities. Both activities recorded an increase of 8.9 percentage points and seven percentage points, respectively, from the first survey in 2014 to the last survey in November 2018. When asked about attendance to cultural events, the respondents to the survey in November 2018 held once again that city-wide activities (33.1%) and carnival (29.8%) are still the most popular events. These were followed by cinema/films and 02.4%, respectively.

Overall, Valletta residents' patterns of behaviour in terms of utilisation of their own spaces for relaxation purposes, shopping for clothes and shopping for groceries remained constant over the last five years. However, shopping for clothes, which was the most popular activity in 2014 with 90.2% dropped to the third activity in November 2018 with a drop of nine percentage points, while relaxation in public places became the most popular activity among Valletta residents in November 2018 with an increase of 11.2 percentage points from 2014. On the other hand, Maltese residents who get to the city from other localities are increasingly enjoying dining in Valletta; this was shown with the increase of 15.6 percentage points from 2014 to November 2018 of people dining in Valletta during winter and an increase of 19.9 percentage points for the same period for summer.

When the respondents were asked about their level of agreement with reference to a number of statements that described Valletta, it must be noted that most of the respondents had a very high level of agreement with statements like 'Valletta is a city rich in culture' and 'Valletta as a city that is changing for the better'. Finally, it is interesting to note that, over the years, the knowledge of Valletta as a European Capital of Culture increased, from 65.4% of the respondents in 2014 confirming their knowledge about Valletta as European Capital of Culture in 2018, to 93.3% in November 2018, a further increase of 2.4 percentage points from the May 2018 survey.

A COMPREHENSIVE ANALYSIS OF THE VALLETTA 2018 CULTURAL PROGRAMME Daniela Blagojevic Vella with Vikesh Godhwani

Objectives

The study's main objective is to analyse the programme in three specific areas, namely the cultural offer, audience participation and European collaboration as experienced on the ground by programmers and producers. The study analyses the Cultural Programme experience including objectives set, problems faced and results achieved throughout the implementation phase.

The previous studies (2015-2017) focused on the planning and development stages while this report concentrates on the actualisation of the programme throughout the European Capital of Culture year.

Methodology

This study takes a qualitative approach, using primary data gathered through interviews and consultation meetings with key informants responsible for programming and relevant stakeholders. The participants' knowledge and experiences were used to gain an in-depth understanding of how the programme unfolded throughout the year.

An online survey was conducted with coordinators, producers and creators leading individual projects or programme strands. Monthly project visits and observations were carried out to gain an overall understanding of particular performances and workshops. The information gathered was transcribed and coded according to the main themes being analysed.

Secondary data sources which include the event's programme, marketing materials, the Valletta 2018 website, and the working documents as supplied by the Foundation, were also used to understand the programme range and content.

Results

The study examines the Cultural Programme strategies and processes through an analysis of Valletta 2018 documentation, over 10 interviews with programmers and an online survey with participants involved in a range of 2018 projects.

On the cultural offer, the study finds that the development of programme content was characterised by ongoing changes and reworking of themes and projects. The programme included activities across main art forms with music and visual arts being the most represented genres. Overall, the programme included a varied cultural offer and mixture of projects ranging from mass events to niche community-based projects with different and often contrasting objectives.

The study also looks at the diverse forms of engagement varying from mere attendance to co-creation and active collaboration with specific target groups. Mixed methods were used to promote projects but the extensive range of events meant that projects were also competing for limited resources and audiences.

About the European dimension, generally, respondents felt that their project themes were relevant to international audiences and that their projects had export potential. The island theme and Malta's geographical position was interpreted as an opportunity to create meaningful international connections. Local producers working with the Foundation experienced certain difficulties when collaborating with a minority of international practitioners.

Way Forward

This analysis has been completed just before the end of the ECoC, such that the overall reflection by programmers and producers may not yet be fully apparent and articulated. A further update in 2019 is recommended to allow the main programme contributors to have more detachment and time for hindsight reflection.

Moreover, this report focuses on the perspectives of those directly involved in programme delivery. Further studies may also explore the attitudes of local creative practitioners who did not participate in the Cultural Programme. Such perspectives could provide information on why creatives may be alienated and what barriers to participation they perceive.

THE IMPACT OF VALLETTA 2018 ON THE EUROPEAN IDENTITY OF THE MALTESE POPULATION Dr Marcello Carammia and Dr Marie Briguglio with Mr Gilmour Camilleri

Objectives

This research study aims to analyse the impact of Valletta 2018 by examining whether 'European identity' may be affected by the programme, to what extent, and among what segments of the population.

Methodology

This study applies a four year (2015-2018) mixed-method impact assessment approach to monitor European identity in the Maltese society, and the impact of Valletta 2018 on it. Desktop research conducted in 2015 provided the background for the study. In 2016, a quantitative large-scale survey was carried out to obtain systematic data on European identity and awareness of Valletta 2018 early in the ECoC project. In 2017, focus group discussions were carried out to obtain deeper qualitative insights.

In 2018 the quantitative survey was repeated with interviews conducted in the last quarter of 2018 to provide a systematic comparison of European identity before and after Valletta 2018. This formed the object of the final impact assessment study, which was also submitted at the end of 2018.

Results

The findings from the 2018 wave of the survey confirm and reinforce the results of the first wave. As expected, awareness, active participation and attendance of Valletta 2018 events were higher in wave two compared to wave one. Respondents attending events of Valletta 2018 as a European Capital of Culture tended to be employed, married and of older age. This demographic also correlated with pro-European preferences – audiences tend to be those who perceive the European Union as beneficial. Correlation analysis indicates that indeed Valletta 2018 does relate to European identity. This relationship depends on how European-ness is defined: not all definitions show a relationship with exposure to Valletta 2018 participation. A closer look at the identity variable reveals that attachment to Europe remains at the same average level while a higher share sees Malta's membership to European Union as beneficial and as a good thing both at personal and country level. There were lower preference for intervention on immigration and a weaker positive view on the EU having consequences. Other correlates of "European-ness", include interest in politics, labour status, marital status and age. It is worth noting that knowledge of the EU presidency (which was also held in Malta, and which is also a form of exposure) also correlates with European identity.

Way forward

In addition to providing important insights on exposure to Valletta 2018 and European identity in Malta, the 2018 survey was designed to contribute to the Valletta 2018 final report. Comparative statics between 2016 and 2018 shed useful insights on what changed before and after the event. Correlation analysis enables us to identify the relationships that continue to exist between 2018. Regression analysis (using panel data) will enable us to elicit any causal effects while parsing out the effects of confounding variables. This will constitute the kind of analysis to be conducted, going forward.

c. Darren Agius

GOVERNANCE & FINANCE

CREATIVE ECONOMY REPORT: 2015-2017 Economic Policy Department, Ministry for Finance

Objectives

The aim of this study is to update the 2014 Creative Economy Report which gives an overview of the creative economy and its various sub-sectors. The update is based on unpublished NSO national accounts statistics of output at 2-Digit NACE and also employment data obtained from Jobsplus. This report provides an account of the economic performance of the CCIs between 2015 and 2017. This update is based on national accounts data published in September 2018.

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Methodology

The study uses the 2014 Report data as a base. This data was in turn based on detailed information at 4-digit level available from the Structural Business Statistics compiled by the National Statistics Office, although some issues in terms of comparability have been encountered in view of the SBS no longer containing detailed sectoral data at 4-digit level. The major constraint is actually deemed to be in the underrepresentation of the arts which are predominantly based on the aggregate NACE 90 (Creative Arts and Entertainment Activities) and do not therefore allow an accurate distinction between the annual performance of visual arts, performing arts and music. Cultural education is assumed to move in line with the overall growth in total education activities in Malta. The significantly high representation of the crafts sector by NACE 23 (manufacture

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of non-metallic minerals) may also be a notable limitation. In this context the detailed results at a sub-sector level should be viewed with more caution.

Results

In 2017 the Culture and Creative Industries accounted for 7.9% of the total gross value added (GVA) created by the Maltese economy, up from 7.7% in 2015. To put this into perspective, this exceeds the direct contribution of the construction and civil engineering sector (4% of GVA) or the accommodation and food services sector (5% of GVA). The CCIs continued to expand since 2015, reaching an average annual growth rate of 9.4% in 2017, thus outperforming the rest of the economy.

Between 2015 and 2017, employment in the CCIs increased by a significant annual average rate of 6.8%. In 2017 the CCIs also accounted for 6.5% of total full time and part time gainful employment. The CCIs increased employment by almost 926 in 2016 and 1,153 in 2017, following the significant increase of more than 3,600 between 2010 and 2015.

Overall gross value added per person employed in the CCIs in 2017 is estimated at \leq 45,700 which is currently higher than what is on average generated in either manufacturing (\leq 35,300) or services (\leq 44,900).

These indicators all point to the growing importance of the CCIs in Malta. They show a dynamic industry which generates growth and jobs. Nevertheless the strong performance during this period is mainly attributable to the creative business services sub-sector, whilst the more traditional sub-sectors registered a more moderate or negative performance. This was primarily attributable to the fall in value added generated in the audiovisual sector, which affected negatively the arts sub-sector particularly in 2016. The decline in the Arts in 2016 was mainly due to the extraordinary increase registered in 2015 which was primarily related to artistic services rendered to the film industry within the audiovisual sector which had also recorded a substantial surge during that year.

The report indicates that there is scope to strengthen further the indirect contribution of the CCIs, particularly the linkages with the various other industries in Malta. Earlier research carried out by the Economic Policy Department suggests that in general (excluding the arts which were not covered by the study) and with a few exceptions, the CCIs display relatively weak GVA multipliers compared to other sectors of the economy. Such multiplier effects are not captured by the direct contribution as measured in this report.

Way forward

Whilst statistics show the growing commercialisation of the CCIs, this should not be misinterpreted as a sign of a decline in the consequence of the more traditional arts and culture sectors. Cultural and artistic activities contribute to the economic development and wellbeing of a society often in indirect ways and benefits are often intangible and not measured in statistics presented in this report. In addition, these activities are more vulnerable to market failures related to property rights, information asymmetries and externalities which justify a stronger element of state involvement and support. Qualifying and quantifying such intangible benefits with a view to present a more holistic picture of the CCIs and to guide public policy accordingly should be endeavoured.

CREATING A CAREER IN THE CULTURAL & CREATIVE INDUSTRIES Jobsplus

Objectives

The main objective of Jobsplus' research and contribution is to analyse the impact of Valletta 2018 on employment within Malta's Cultural and Creative Industries. Such analyses are based on statistical indicators to establish changes in the employment structure in CCIs pre- and during Valletta 2018.

Methodology

The methodology that had been adopted during this research was primarily based on quantitative techniques. A statistical analysis of employment indicators was carried out through a quantitative perspective. Such indicators included full-time employment in CCIs, part-time employment in CCIs, total employment in CCIs, notified vacancies to Jobsplus (relating to CCIs), and the number of registered jobseekers (searching for jobs relating to CCIs). The figures were analysed on a quarterly basis as well as on an annual basis and they covered the period 2014 – 2018. All the data used was based on Jobsplus' database.

Results

- Full-time employment in CCIs has increased from 8,618 in Quarter 1 of 2014 to 10,357 in Quarter 1 of 2018, equivalent to a 20.2% increase over a three-year period.
- Over a four-year period, part-time employment in CCIs increased from 1,612 in Q1 of 2014 to 1,966 in Q1 of 2018.
- Total employment (full-time + primary part-time employment) in CCIs as at end of March 2018 amounted to 12,232; approximately 5.26% of employment in the total economy.

- As at end of September 2018, the number of vacancies related to CCIs notified to Jobsplus, accounted for 3.2% of the total number of vacancies notified to Jobsplus during the third quarter of 2018.
- The number of jobseekers looking for employment in CCIs has decreased from 483 in Q1 of 2014 to 146 in Q3 of 2018. Notwithstanding, overall unemployment in the Maltese labour market has declined drastically throughout recent years.

Way forward

The way forward following this analysis from a labour market perspective, is to research beyond the 2018 period, as it is only through research which covers different periods that an analysis can be more thoroughly conducted.

. Elisa von Brockdorff Magna

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COMMUNITY INCLUSION & SPACE

COMMUNITY INCLUSION AND ACCESSIBILITY IN VALLETTA 2018 Michael Deguara with Rene Magri and Marguerite Pace Bonello

Objectives

This research project seeks to identify factors affecting community participation and accessibility, with an emphasis on the awareness that various groups have of the Valletta 2018 programme. It also aims to explore perceptions of Valletta's foreseeable developments, particularly those related to the city as a community space.

Methodology

The current cycle of research, in the actual year of the European Capital of Culture 2018, seeks to explore further developments within Valletta and Malta as the host city and region respectively. The Methodology remains largely unchanged from the previous cycles, with semi-structured interviews being carried out with four individuals from each of six groups, namely (1) Beltin residing in Valletta; (2) Beltin residing outside Valletta; (3) non-Beltin residing in Valletta; (4) respondents from the Inner Harbour area; (5) respondents from other parts of Malta; (6) persons with disability. The interviews carried out were complemented by participant observation in

community oriented programmes within Valletta 2018, which provided further insights. All interviews were conducted in the last quarter of 2018, allowing for most of the Valletta 2018 Cultural Programme to be completed at the time when these took place.

Results

One of the overarching concerns was that of accessibility, where Valletta remains largely inaccessible to people with a disability, impairments, and mobility issues. MUŻA can be seen as an example of good practice in ensuring that not only the structure, but also the cultural offer are presented in a way that is inclusive and accessible.

The commercial activity which has been catalysed, at least in part, by Valletta 2018 has been largely welcomed, especially by small business owners in Valletta. However, efforts to reduce disturbance to Valletta residents are sorely needed. Another concern for residents, especially those in private rental accommodation, is the possibility of being uprooted from their own communities. The newly launched White Paper on the Rental Market hopefully brings light to this situation – however, it is noted that if residents are being forced to move out, this will have a negative impact on their personal lives and on the vibrancy and the social fabric of the city.

With regard to programming, it has been noted that the general view has been positive, but that more community-based events could have been included. It is hoped that the success of the two main projects that directly involved the Valletta community, namely il-Festa I-Kbira and Gewwa Barra, should encourage stronger investment in similar initiatives.

Way forward

There is potential for Valletta 2018 to leave an enduring legacy, which the Valletta Cultural Agency may take up. However, a focus on programming alone cannot achieve this, and an important part of creating such a legacy needs to be fulfilled by enhancing urban infrastructure and liveability, as well as fostering networking, research, consultation, and dialogue.

The research conducted from 2015 to the present year fed into a combined report. This report will include the main insights obtained throughout the four year period of research, together with policy considerations and recommendations.

ASSESSING THE RELATIONSHIP BETWEEN COMMUNITY INCLUSION AND SPACE THROUGH VALLETTA 2018 CULTURAL INFRASTRUCTURAL PROJECTS Dr Antoine Zammit with Tala Aldeiri

Objectives

The objective is to assess the impact that the Valletta 2018 Foundation's four major infrastructural projects are having on the city's community and architectural heritage. The study aims to expose the effect of cultural infrastructure on the physical urban fabric and seeks to understand the manner with which the behaviour of the community and users is altered. It therefore ultimately deals with the conditions for liveability of the urban space. The main research question of this study is: What role can cultural infrastructure play in the achievement of culture-led regeneration?

Methodology

Building on the research that had been carried out in 2015 and 2016, which focused on the gathering of data on the four sites, this year saw the same empirical work being carried out and consolidation of data and data analysis for the comparison of results and phenomena. The work covered both the physical and social aspects of the four Valletta neighbourhoods. In order to assess the current state of urban quality, together with a land-use analysis of each site and its surrounding context (Stage 5 of the research), two sets of results emanating from deductive physical analyses were compared with data from 2016. Patterns emanating from inductive behavioural analysis (Stage 7 of the research) were in turn compared to the physical results in order to derive potential patterns. A current physical land-use analysis was also carried out with a focus on change of use. The latter was analysed to a greater depth (focusing particularly on ground floor uses) in order to understand the nature of change that the physical fabric has undergone over the duration of this study. All analyses contributed to a richer and deeper understanding of the current state of affairs of the four neighbourhoods which towards the end of 2017 had been supplemented by a PPGIS workshop (Stage 9 of the research) in order to understand local community needs, concerns and aspirations using an accessible online platform. The PPGIS results have also been analysed in the first part of 2018.

Results

The empirical work carried out in the aforementioned research stages (Stages 5, 7 and 9) falls within a mixed methods approach. In its entirety, this work is composed of both deductive and inductive avenues for research, along with qualitative and quantitative methods that have been refined over the course of their application.

Following the PPGIS walkabout, there was a required process of technologically archiving collected information. This process had already started during the walkabout session when participants mapped their observations directly onto the online platform. Those who were still not comfortable using the Mapping for Change app, or who had connectivity issues with their phones or tablets, chose a manual option and mapped out their observations on paper, which was later digitised. Therefore, one method of archiving was on the online platform, and the other was a more exhaustive archive using Excel. This enabled the extraction of the most frequently-repeated remarks within a clearly outlined table for the four sites, which consequently permitted further extraction of themes from participant responses to create specific categories for numerical evaluation. Additionally, the online engine 'Voyant-tools' was used to provide word count frequencies from the participant texts. The resulting words were added to the analysis table to give an indication of the participants' most-noted observations and concerns.

The study encompassed both qualitative and quantitative methods, and once the participants; responses and information were provided by means of text, the data was mined and categories were extracted. The extraction of categories is based on the repetition and difference of comments that were made available through a corpus of unstructured text. The numerical data was used to create radar graphs as the output of results for each site, which allows one to graphically see which categories are prominent and therefore important to take note of for future policies. Consequently, the radar graphs of the four sites were overlaid for comparative analysis. Each site has a graph peak that represents the category most noted by the participants, which permits one to understand the primary concerns for each site. Graphical results facilitate the deduction of final conclusions.

Stage 5 included the Repetition of spatial (physical temporal) analysis on the ground in order to compare to results obtained in 2015 and Stage 7 included the Repetition of behavioural (observational) analysis on the ground using the indicators achieved in the baseline study carried out in 2015.

Way forward

Overall results reveal that Valletta 2018 has had a positive outcome on its physical fabric in terms of improvement to the physical quality of the buildings within most of the four neighbourhoods, in spite of some differences among the sites. Spatial assessments indicate a general improvement from 2016. For the Biccerija area, ongoing construction projects are heavily impacting accessibility within the area, with several public and private projects expected to be concluded in the coming months, and with the Valletta Design Cluster aiming at providing access to new facilities and public spaces in this previously delapidated neighbourhood

once it opens its doors. Is-Suq tal-Belt initially scored high in accessibility, however, once several other factors were considered over time, the final figure pointed to a low score for accessibility. Changes are constantly taking place so it is important to consider constant assessment for well-encompassed research. Land use changes and architectural interventions have indicated predominant activities for each neighbourhood. Since Valletta won the ECoC title, PA applications for further developments (or redevelopments) have increased and most have changed use from residential towards leisure or commercial. A significant increase in hotels is also evident from a general increase in tourist activity in Valletta. This is strong proof that Valletta is transforming from a retail to a catering destination.

c. Darren Agius

THE TOURIST EXPERIENCE

THE IMPACT OF VALLETTA 2018 ON THE TOURISM SECTOR Malta Tourism Authority

Objectives of research

This research study aims to monitor tourists' awareness levels of Valletta 2018 and to measure tourism activity directly generated by Valletta 2018. This research also aims to monitor the relevance of culture as a pull factor for tourists visiting Malta and to monitor tourism activity in Valletta namely visitor flows, sites and attractions visited and visitor impressions of Valletta.

Methodology

The study is mainly based on indicators originating from continuous surveys carried out by the Malta Tourism Authority (MTA), namely the 'Traveller Survey' and 'Heritage Locality Survey'. The 'Traveller Survey' is an ongoing postal questionnaire, which is randomly distributed to tourists on their arrival at the Malta International Airport, while the 'Heritage Locality Survey' is an ongoing research exercise for designated heritage sites (Valletta, Mdina, Birgu).

Results

Inbound Tourism Performance - 2018 was expected to mark the eight consecutive year of growth in inbound tourism, where a new record high was reached. The number of total inbound tourists to Malta was expected to reach 2.6

million, recording a significant increase of 14.3%. This achievement is even more remarkable as it comes on top of the increases achieved in the previous years. During the year, 3 out of 5 inbound tourists were aware of Valletta 2018 event prior to visiting Malta, representing a significant increase of 21.5 percentage points over the previous year. As one would expect, the highest share of inbound tourists aware of Valletta 2018 prior to visiting Malta was recorded in the year when the event took place. This finding represents the success of the initiatives undertaken by the Malta Tourism Authority and Valletta 2018 in particular, in promoting this prestigious event overseas.

It is expected that around 348,500 tourists would have visited Malta primarily motivated by Valletta 2018. This amount represents a significant increase of 234,500 tourists over the year preceding the event. The number of tourists attracted to visit Malta by Valletta 2018 more than tripled in 2018 when compared to 2017. In 2018, it is expected that the number of tourist guest nights and tourist expenditure generated by Valletta 2018 to reach almost 2.3 million and €376 million respectively. This reflects a notable increase over the previous year. The tourist expenditure attributed to Valletta 2018, accounts for around 18% of total tourist expenditure.

Tourism in Valletta - In 2018, around 9 out of 10 inbound tourists would have visited Valletta during their stay, whilst 1 out of 10 would have stayed in accommodation establishments within the area. Both shares represent increases over the previous year. A remarkable 2.4 million inbound tourists would have visited Valletta, whilst more than one quarter of a million would have spent nights in accommodation establishments within the area. In 2018, it was also expected that 1 out of 5 tourists staying in Valletta to be greatly motivated by culture in their decision to visit Malta, whilst the ratio goes down to almost 1 out of 10 for those staying in other parts of the island. It is worth noting that both shares registered an increase over the previous year. The top three aspects of the city appreciated most by tourists include the cultural offer, the architecture and ambience. On the other hand, cleanliness in Valletta seems to be lacking. Tourists were also bothered by the overdevelopment and traffic in the city.

In 2018, the large majority of tourists (93.1%) enjoyed their visit in Valletta, with 52.8% of visitors giving a rating of 'very good'. The likelihood of recommending the Capital City to friends and relatives is high amongst visitors. In fact, in 2018, 3 out of every 5 Valletta visitors stated that it is 'Very Likely' that they would recommend it to friends and relatives. This was followed with a 'Likely' percentage of 32.1%.

Way forward

In a nutshell, research findings show that Valletta 2018 has had a significant impact on the tourism sector both at a direct and indirect level. As expected, the impact on the number of tourists and the resulting guest nights and expenditure peaked in 2018 registering remarkable growth rates. However, the build up towards this prestigious event is clearly reflected by the volumes and wealth generated in the preceding years. In this respect, research evidence shows that the marketing initiatives undertaken by the Malta Tourism Authority and Valletta 2018 in particular have been successful in raising Malta's cultural image overseas during these past four years. Furthermore, the benefits of raising Malta's cultural identity overseas are expected to extend to the coming years.

THE VALLETTA BRAND

AUDIENCES' EXPERIENCES OF THE VALLETTA 2018 BRAND Dr Emanuel Said

Objectives

MARSAMAKE

The study offers insight into how audiences engage with the different forms of communication and events forming part of the Valletta 2018 programme. Longitudinal in nature, this project determines the effects that each type of communication purports on different audiences, as reflected in individuals' attitudes and behaviours.

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Methodology

In acknowledging that audiences engage with brands through a multitude of encounters that range from direct instances¹ to other indirect experiences², the study adopted a mixed methods approach, which involved real-time experience tracking (RET) (Baxendale, Macdonald, & Wilson, 2015; Macdonald, Wilson, & Konus, 2012), as well as focus group discussions and face-to-face interviews about the audiences' perceptions on encounters and experiences with the Valletta 2018 brand.

The use of a smartphone app that offered an improved participant engagement with RET approaches, was key to this methodology. This app was developed by

¹Such as advertising or actual event participation.

² These involve word of mouth from friends or acquaintances, or third-party social media contributions (as would be acquaintances posting on Facebook, Twitter, or Instagram, among others).

a subcontracted developer and it helped the gathering of data concerning the participants' personality characteristics (to ease individuals' clustering) as well as brand experience (by relating to sensory, affective, and intellectual dimensions that are relevant to Valletta 2018 as an experienced brand).

Results

A total of 787 participants used the new app in 2018 to report on their experiences with a diversity of events forming part of the culmination of the Valletta 2018 programme of events. These participants reported a total of 829 encounters. Of these participants, 415 were female. 388 had received up to secondary school education, while another 149 had obtained a university degree. 239 participants lived in the Northern Harbour region, while another 139 lived in the Western Region. 374 participants were married, while another 291 were single. Overall, participants had an average age of 43 years (median age of 42).

By following the methodology of Asendorpf, Borkenau, Ostendorf, & Van Aken (2001) and Rammstedt, Riemann, Angleitner, & Borkenau (2004), participants were categorised into three groups, according to their personality characteristics. Indeed, 758 participants could be grouped into three personality types: *resilient* (n = 51), *undercontrolled* (n=294), and *overcontrolled* (n=413). The other participants could not be categorised because their responses lied well outside the $z = \pm 3$ range.

This study compared dimensions of brand experience (after Brakus, Schmitt, ϑ Zarantonello, 2009) among participants before and during the administration of the Valletta 2018 programme of cultural events. It finds that there are no significant differences in the experienced sensory/affective and intellectual dimensions of brand experience across the participants' engagement with our study (usually one week). However, when these dimensions were compared with earlier waves of RET data (collated in 2016 and 2017 before the implementation of the Valletta 2018 cultural programme), this study found a significantly reduced response towards Valletta 2018's impression on and its appeal to the participants' senses, a reduced strength of emotions, an increase in thinking about Valletta 2018, and reduced curiosity. These observations suggest awareness about the Valletta 2018 ECoC programme grew saturated over the first months of 2018, as audiences experienced culminating communications that contrasted against earlier communications in 2016 and 2017. Awareness saturation may lead to increased intellectual engagement as well as eased sensory/affective perceptions among audiences who became more familiar with the Valletta 2018 brand/phenomenon.

In 2018, most encounters reported were related to Valletta Pageant of the Seas (312 encounters), the Malta Fashion Awards (91 encounters), and Earth Garden Festival (80 encounters). Encounters in 2018 most often involved television viewership

(31.8% of encounters) followed by participation in events (19.7% of encounters), and internet browsing (19.4% of encounters). Among all the events, the Valletta Green Festival, il-Festa il-Kbira, and the Malta Robotics Olympiad were the most important events referred to by the participants during the time of the study.

RET reflections indicate 19 dimensions in which participants can co-create value when experiencing the Valletta 2018 cultural events, while other individuals are involved in the co-creation network. Of these, the more dominating themes in the participants' reflections were related to anticipation (or the awaiting of experiences to feel or undergo), standard of experience (or elements of quality characterising the experience), and access (or aspects of access to participants from a logistical, temporal, linguistic, or economic perspective affecting their experience).

Way forward

The project fieldwork is considered to be complete, and the emerging results offer new insight into how audiences engage with cultural brands like Valletta 2018 ECoC from a processual, longitudinal perspective. This characteristic of the study is considered to be a key contribution that further helped ECoC administrations as well as the practitioners in cultural branding, to align branding strategies that yield optimised audience engagement outcomes.

During 2019, the team involved in this study is intent on disseminating the emerging contributions in academic and public fora. An extended abstract was submitted for competitive evaluation, leading up to a presentation at the 15th International Conference on Arts & Cultural Management, due in June 2019 in Venice (Italy). A further academic journal paper intended to be submitted for publication in a targeted marketing or cultural marketing journal, is in the pipeline.

MEDIA ANALYTICS Maria Mizzi, Valletta 2018 Foundation

Objectives

The scope of this study is to understand the performance of the Valletta 2018 communications strategy within local and international communities. The expected outcome of this study is the quantification of the visibility of Valletta 2018 through different forms of media, highlighting different typology and sources.

Methodology

The study was carried out through monitoring of social media analytics through brand monitoring software and social media channels. This is supplemented by ongoing manual monitoring of local print media publications, including newspapers and magazines.

Results

37,734 mentions of different phrases including "Valletta 2018" were registered across various online channels throughout. 8,927 mentions were on Twitter, whereas 18,554 were in the form of images or photos. The days with the highest number of mentions were 20th and 21st January 2018 (the day of the Valletta 2018 Opening Ceremony and the subsequent day), with 2,588 and 2,726 mentions respectively.

As of the end of 2018, Valletta 2018 had a total of 40,553 followers likes (an increase of 31,696 over the previous year), as well as 7, 511 Twitter followers (an increase of 1,000) and 6,238 Instagram followers (an increase of 1.069).

The Foundation's website was visited 2,020,364 times (+283% over 2017) by 397,747 (+181% over 2016) users throughout 2018.

Way forward

Monitoring of both online and print media was ongoing throughout 2018, in order to gain further insight into the visibility of Valletta 2018 and its related activities during the ECoC year. This data can be used to develop more effective marketing and outreach campaigns for future cultural activities across the local cultural sector.

CONCLUDING REMARKS

The summaries contained within this publication provide a snapshot of some of the findings from each study, giving an indication of the breadth of data that was collected and analysed throughout the duration of the Evaluation & Monitoring process.

However, these summaries are only the tip of the iceberg. Each study is presented in further detail in its respective full report, together with a comprehensive analysis of the findings and discussion on the outcomes of each study. These reports, published by the Valletta 2018 Foundation, are freely accessible to the public through the Valletta 2018 website.

The outcomes from this process indicate an ever-growing need for the local culture sector to continually develop new audiences, engage with local communities and provide inclusive and open access to cultural activities.

The Valletta 2018 Foundation augurs that this form of broad, interdisciplinary research into the cultural sector will transcend the ECoC and continue beyond 2018. It is through this process of critique and self-reflection that the cultural sector can develop further.



c. Ali Tollervey & Film Grain Foundation

Robotopia

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