

THE IMPACTS OF VALLETTA 2018

2017 RESEARCH



CONTENTS

INTRODUCTION	3
1. CULTURAL & TERRITORIAL VIBRANCY	5
2. GOVERNANCE & FINANCE	12
3. COMMUNITY INCLUSION & SPACE	15
4. THE TOURIST EXPERIENCE	19
5. THE VALLETTA BRAND	21
CONCLUDING REMARKS	26





INTRODUCTION

The Valletta 2018 Foundation's Evaluation and Monitoring plan enables the Foundation to assess the success, or otherwise, of the process in a consistent, accessible and comparable manner.

The Valletta 2018 Foundation Evaluation & Monitoring Research Plan is structured around five research themes, with each theme comprised of a number of separate studies.

The Foundation has set up an Evaluation & Monitoring Steering Committee to monitor and evaluate the process and impacts of Valletta as an ECoC. The Steering Committee is composed of four public entities and five researchers who are conducting research of a quantitative and qualitative manner. The process is coordinated and managed by the Research Department of the Valletta 2018 Foundation.

The research process will run for the period 2015-2018. Baseline studies were carried out in 2015, with results being presented annually. The final results will be presented in mid-2019.

Research Theme	Objectives	Research Study	Researcher/Entity
Cultural and Territorial Vibrancy	To evaluate the success of the Valletta 2018 Cultural Programme and the change in cultural participation and identity	Valletta Participation Survey	National Statistics Office
		Cultural Participation Survey	Arts Council Malta
		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 and Finance	To understand the investment and management in Valletta 2018 and the related impact on Malta's cultural and creative sector	Creative Economy Report: 2017 Update	Economic Policy Department
		Creating a Career in the Cultural & Creative Industries	Jobsplus
Community Inclusion and 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 communication strategy within different communities	Audiences' Experiences of the Valletta 2018 Brand	Dr Emanuel Said
		Media Analytics	Valletta 2018 Foundation

1

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 Maltese population in cultural activities organised in Valletta, many of which are organised as part of Valletta 2018. The VPS, being in its fourth wave, also provides a time series on how and if attitudes, perceptions and participation in cultural activity changed across these four years.

Methodology

The target population of the Valletta Participation Survey 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 results in the final sample. Data collection was carried out through telephone interviewing (CATI) between September and October 2017. A 77% response rate was obtained in 2017. Response rates throughout the previous rates stood at 81% in 2016, compared to a response rate of 84% in 2014 and 77% in 2015.

Results

This fourth wave of the Valletta Participation Survey allows for the comparison of data across multiple years, identifying changes and developments in trends or

patterns of the respondents. For the majority of the variables there were no drastic changes in the trends or behaviours across the four waves. Nonetheless, there are some noteworthy results that merit further discussion.

An increasing number of Valletta residents are using public places for relaxation (86%, up 13% from 2014). Valletta residents are increasingly using the private car as their preferred means of transport to leave Valletta (an increase of 2.9% from 2014), however the use of public transport also increased by 1.5 %.

The most popular cultural events in 2017 were those defined as city-wide activities, such as Notte Bianca and Carnival. These activities were also the main two activities throughout the four-year period under observation. It is also worth noting that the patronage of live theatre performances recorded an increase of nearly 3% from 2014 till 2017.

When the respondents were asked about their level of agreement with reference to a number of statements that described Valletta, 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". Both statements recorded an average score of 4.5 and 4.4 respectively, on a scale of 1 to 5 (1 showing a low level of agreement and 5 showing a high level of agreement). On the other hand statements like "Valletta as a city which does not offer enough choice for entertainment" and "Valletta as a city which is changing for the worse" recorded the lowest levels of agreements with average scores of 2.7 and 1.3 respectively.

Respondents to the survey increasingly believe that the greatest beneficiaries of the European Capital of Culture title will be businesses (an increase of 5.1% from 2016).

There was a general increase in awareness of the European Capital of Culture title - 71.4% of respondents stated that they had heard of the title (an increase of 4.4% points from 2016 and 8.7% on 2015). Furthermore, 81.9% could correctly state when Valletta would hold the ECoC title (an increase of 15% on 2016 and of 24% on 2014). The main source of information about Valletta 2018 is television (61%).

Way forward

The VPS will be carried out twice throughout 2018, in May and in November.

CULTURAL PARTICIPATION SURVEY

Arts Council Malta

Objectives

The principal objective of Arts Council Malta's research is to build the necessary capacity and expertise to ensure that policy decisions are informed by ongoing research and evaluation. Facilitating the increase in cultural participation is

among the main goals of Arts Council Malta's strategy. In view of this, the Cultural Participation Survey (CPS) 2016 (preceded by the 2011 survey) was commissioned in order to get an overview of cultural activity in Malta. The data serves to support evidence-based policy implementation and as a publicly accessible knowledge base to the cultural sector.

Methodology

The CPS 2016 was designed to build upon the 2011 survey by adopting a similar methodology to ensure comparability while accounting for new or extended themes to reflect the contemporary context. For the purpose of this study, the 2011 Population and Housing Census was used to select a stratified random sampling frame for individuals aged 16 and over, residing in Malta and Gozo. Data was collected through face-to-face interviews between October and November 2016 with a net sample of 1,125 individual cases - a 75% response rate. The questionnaire was designed through a collaborative effort between the National Statistics Office (NSO), Arts Council Malta and the Valletta 2018 Foundation. Besides the correlation of cultural activities with socio-demographic variables, this survey also introduced psychographic variables through perception based questions as well as subjective well-being, *inter alia*.

Results

The findings indicate that 91% of the adult population in Malta participated in a cultural activity at least once in 2016, which could be through attendance only or being actively involved in a cultural activity. The highest percentage point increase and largest attendance was registered for parish feasts with a 67% attendance, a 10% increase from 2011. The lowest participation was in dance with a 12% attendance, equal to 2011 levels. Cinemas registered an attendance of 42%, historical sites 35% and museums 30%, which are all increases from 2011. The survey also revealed that 37% of the population was active in a variety of cultural activities in 2016, with crafts (19%) and active involvement in a parish feast (10%) being the most popular. This group of respondents also scored higher on the life satisfaction scoreboard than those who did not actively participate in cultural activities. The percentage of people who read at least one book in 2016 stood at 44% with 20% having visited a library.

62% agreed that arts and culture should be publicly funded and 32% agreed that arts and culture are an essential part of their life. Lack of time was perceived to be a barrier to attendance to 57% of the population. Public cultural organisations were characterised by high awareness and low visitation levels, with the majority having more than 70% awareness.

Way Forward

Following the survey, a publication containing critical essays based on the findings was launched in 2017 entitled Perspectives on Cultural Participation in Malta. In 2018, Arts Council Malta will be promoting application of the findings to enhance audience development strategies by cultural operators. Furthermore a survey focusing on creative professionals will be designed in 2018 as a continuation of the Cultural Participation Survey.

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

Objectives

In September 2017, the Valletta 2018 Foundation launched its Cultural Programme which includes around 140 projects and 400 events to be organised throughout the year. This study aims to analyse the creation and development of the Cultural Programme and its individual projects.

The 2017 analysis builds on the research work carried out in the previous two years and looks into the strategies and practices in place to finalise this programme. The aim is to understand how the Valletta 2018 Foundation and its Cultural Programme operates by looking at three specific areas: (i) the cultural offer; (ii) audience participation (iii) the European dimension. The study looks at these elements from a production perspective and sets out to understand producer perspectives on these three elements.

Methodology

A mixed-methods approach was used to reflect the multi-dimensional aspects of the Cultural Programme and the developments unfolding over five years. The research includes semi-structured interviews, focus groups and an online questionnaire.

In 2017, data was gathered primarily through in-depth interviews, focus groups as well as an online questionnaire sent to producers and project leads.

The interviews and focus group studies were carried out with:

1. Foundation Programming team members and management;
2. Creators, producers and strand coordinators of projects in the Cultural Programme;
3. Independent artists and groups participating in the programme.

Results

In the first year of study, the focus of the study was the analysis of the programme's vision as articulated in the published material and as experienced by the content programmers in the development phase. In 2016, the study observed the further consolidation of the Valletta 2018 Cultural Programme. The interpretation of audience participation and engagement varied amongst different interviewees involved in projects ranging from grassroots community projects to the large scale events aimed at attracting large audiences. However, the study also indicated that interviewees shared a common vision of striving towards widening participation and with this a common concern and awareness that this requires ongoing efforts.

In 2017, the Cultural Programme was finalised and over 140 projects were included in the final programme, substantially widening the range and diversity of the programme. Throughout this year, the study observed how the Cultural Programme was finalised to include a wide range of projects some of which had been developed in previous years and other projects joining the list at a much later stage. Much of the work in 2017 involved securing contractual agreements and participation of international artists, showing a continued intensified drive towards international links and a wider cultural offer.

As was clear in previous years, the interpretation of audience participation and engagement varies amongst different interviewees involved in projects ranging from smaller community projects to the large scale events aimed at attracting large audiences.

Way forward

In 2018, with the full implementation of the Cultural Programme, the main focus will be the onsite evaluation through project visits. At present, a project visit schedule is being drawn up so that different assistant researchers will be assigned to the individual performances. For each visit a data sheet will be inputted to a central system so that the information on each project visit is compiled.

Focus groups will be organised in the second quarter of 2018 with the Foundation's programming team, strand coordinators and producers. In-depth interviews will be organised with foreign producers who will not be able to attend focus groups. An online questionnaire will be sent to all producers soon as their performance is finalised so that data is collected throughout 2018.

Regular meetings with the Programme Coordinator and other team members will be organised to ensure regular updates.

THE IMPACT OF VALLETTA 2018 ON THE EUROPEAN IDENTITY OF THE MALTESE POPULATION

Dr Marcello Carammia & Dr Marie Briguglio

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 information on European identity and awareness of Valletta 2018 in the first years of the ECoC project. In 2017, focus group discussions were carried out to obtain deeper qualitative insights into the relationship between cultural participation and European identity. Focus groups were composed in such a way to ensure representation to the key socio-demographic components of the Maltese society. The survey and focus groups will be repeated in 2018 to compare data on European identity before and during Valletta 2018.

Results

The focus group sessions provided in-depth insights as to feelings related to being Maltese, being European and how these concepts live side-by-side. Questions of nationality or belonging are complex issues and focus groups were composed in such a way to ensure representation to the key socio-demographic components of the Maltese society. Two separate groups met, one discussing in Maltese and the other one in English. Valletta 2018 was perceived in overall positive terms. Participants shared the feeling that the Maltese will eventually be proud of the event, and thus of being Maltese and forming part of the EU.

Although some concerns were raised on the capacity to build on the legacy of the programme, both groups expressed the hope that some positive effects of the ECoC, such as the continual restoration of Valletta buildings, will prevail and that structures will be set to enable the cultural community to expand beyond what it is today. Even though respondents did not seem fully informed about the Valletta 2018 programme, the general feeling was that the information would be there when they need it, and that participation would follow.

A key finding of the focus groups was that Maltese and European identities do not seem to compete with each other. Quite the opposite, the identification with Europe (and possibly the Mediterranean region) is likely to be a companion to a strong Maltese identity. Interestingly, this was also a key finding of the quantitative study carried out in 2016. Overall, discussions in the focus groups confirmed that the notion of identity is a complex one that is more easily discussed than understood. This confirms the need to complement quantitative data with qualitative insights.

Way forward

In the last quarter of 2018, the second wave of surveys will be carried out targeting the same sample of respondents interviewed in 2016. This will provide the opportunity to analyse change on the main dimensions analysed in this study, and thus to assess the impact of Valletta 2018 on the European identity of the Maltese. Additional focus group discussions will be organised to obtain deeper insights into the impact of Valletta 2018 in the actual year that it happens. Some modifications will be carried out in the survey/discussion including fewer questions on policy and a question on Mediterranean identity.

2

GOVERNANCE & FINANCE

CREATIVE ECONOMY REPORT: 2017 UPDATE

**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 National Statistics Office national accounts statistics of output at 2-Digit NACE and also employment data obtained from Jobsplus.

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. Trends in national accounts data at 2-digit level were used to update the estimates contained in the 2014 Report. The results of the printing industry have been adjusted to exclude the impact of the printing of currency included in the national accounts data. Because of the lower level of disaggregation of national accounts data, some issues in terms of comparability have been encountered.

Results

Over the course of the last fifteen years, the Cultural and Creative Industries have seen their direct share of the Maltese economy grow by 2.7%, indicating that over this period the CCIs have outperformed the rest of the economy.

The CCI's have maintained their share of gross value added at 7%, continuing to exceed the direct contribution of the construction and civil engineering sector (4% of GVA) or the accommodation and food services sector (5% of GVA). Moreover, the CCI's increased employment by almost 750 in 2016, representing an increase in employment of 5%. Gross Value Added per person employed in the CCI's in 2016 is estimated at €40,900 which is currently higher than what is on average generated in either manufacturing (€33,500) or services (€37,200).

Since 2010 the CCI's have changed drastically and became more business oriented. This was predominantly marked by the growing share of the Creative Business Services (74% in 2016 compared to 62% in 2010). The year 2016 was characterised by the further strengthening of growth in the Creative Business Services and a relatively strong performance by the Heritage sub-sector. On the other hand the Arts sub-sector registered a drop in Gross Value Added. The decline in the Arts in 2016 was exacerbated by the extraordinary increase registered in 2015 which was primarily related to artistic services rendered to the film industry, which is categorised under the Arts sector, rather than the Creative Business Services. The film sector registered a substantial surge in 2015 and returned to normal activity in 2016.

The media sector has also experienced a decline in Gross Value Added in 2016. Overall, profit margins have been maintained or slightly improved in 2016 with the exception of the Arts sector where the loss in turnover related to the drop recorded in the film industry was not matched by a corresponding decline in compensation of employees or intermediate costs.

The more traditional cultural sector (i.e. the combined Heritage and the Arts sectors), accounts for 1/10th of the CCI's (i.e. 0.7% of the total Gross Value Added generated in the economy in 2016). The Heritage sub-sector has increased its Gross Value Added by 8% in 2016 whilst employment in this sector rose by almost 5%.

However the Arts subsector registered a drop in Gross Value Added of more than 45% even though employment still increased by 8% (+236 persons employed). This is related to the developments in the film industry as explained above.

Way forward

The Economic Policy Department is publishing a yearly update of this report. In addition, specific research on the Design sub-sector is ongoing and the results of the survey on design activity based on micro-data obtained from NSO's Structural Business Survey have been analysed using advanced microeconomic modelling. The study will shed light on the determinants of design activity in Maltese enterprises and the determinants of profitability of these enterprises. This will complement previous research by the Economic Policy Department in this area and shed light on questions such as the importance of economies of scale, internationalisation and constraints related to technology transfer in design by foreign-owned enterprises in Malta.

CREATING A CAREER IN THE CULTURAL & CREATIVE INDUSTRIES

Jobsplus

Objectives

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

Methodology

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

Results

Full-time employment in the CCIs has increased from 8,618 in Quarter 1 of 2014 to 10,201 in Quarter 2 of 2017, equivalent to an 18.4% increase over a three-year period. Over a three year period, part-time employment in the CCIs increased from 1,612 in 2014 Q1 to 11,912 in 2017 Q2. Total employment (full-time + primary part-time employment) in the CCIs as at end of June 2017 amounted to 12,113, representing approximately 5.37% of employment in the total economy.

As at end of December 2017 the number of vacancies notified to Jobsplus, relating to CCIs, accounted for 5.4% of the total number of vacancies notified to Jobsplus during the fourth quarter of 2017. The number of jobseekers looking for employment in the CCIs decreased from 483 in Q1 of 2014 to 174 in Q4 of 2017. Notwithstanding, overall unemployment in the Maltese labour market has declined drastically throughout recent years.

Way forward

It is envisaged that a continuous statistical analysis will take place throughout 2018 on a quarterly basis and subsequently also on an annual basis.

3

COMMUNITY INCLUSION & SPACE

COMMUNITY INCLUSION AND ACCESSIBILITY IN VALLETTA 2018

Michael Deguara with Marguerite Pace Bonello and Rene Magri

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 methodology remains largely unchanged from the previous cycles, with semi-structured interviews being carried out with four individuals from each of six groups, namely (i) Beltin¹ residing in Valletta; (ii) Beltin residing outside Valletta; (iii) non-Beltin residing in Valletta; (iv) respondents from the Inner Harbour area; (v) respondents from other parts of Malta; (vi) 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 in the current cycle were carried out following the launch of the Valletta 2018 Cultural Programme.

¹ Beltin refers to people who define themselves as originating from Valletta.

Results

Lack of parking, as in other years, remains a concern but, apart from people with disability, most respondents consider Valletta a walkable city. Physical accessibility has been seen to have come a long way – however, respondents have indicated that much still needs to be done to include persons with disabilities not only as consumers but also as producers of cultural activity. There has been a critique of arguments for limitations to accessibility based on the historical or natural topography of Valletta, as these have been perceived to be used as excuses to delay or avoid possible interventions. Despite this, and other inconveniences, the disability cohort demonstrated a distinct optimism regarding the future accessibility of Valletta.

Respondents demonstrated an appreciation of economic activity but have voiced concerns about Valletta not being a liveable city in the future due to the increase of impact from the entertainment industry, change of use of property particularly into guest accommodation, and property and rental speculation. The unprecedented commercialization of spaces in Valletta has not, however, eroded the sense of Valletta as “home”. It is being proposed that this notion, together with that of “community”, should be considered valuable concepts related to individual and social well-being, that should inform further developments.

Awareness of the programme is at a peak, and most respondents have attended Valletta 2018 related events. There is both enthusiasm as well as critical reception of the programme, and findings indicate that there is a possibility of success for a more grassroots approach to penetrate social groups which may not be reached through the official branding and marketing of the programme.

Way forward

The model used so far with regard to individual interviews from six identified community groups will be retained. Regular contact will be maintained with the teams working on community projects.

ASSESSING THE RELATIONSHIP BETWEEN COMMUNITY INCLUSION AND SPACE THROUGH VALLETTA 2018 CULTURAL INFRASTRUCTURAL PROJECTS

Dr Antoine Zammit with Perit Wendy Jo Mifsud

Objectives

The scope of this research is to understand the spatial (physical) and social (behavioural) impact of cultural infrastructure, primarily architectural and urban design interventions, in terms of broader culture-led regeneration objectives for

the various community and stakeholder groups. The focus of this research is the four Valletta 2018 cultural infrastructural projects, MUŻA, Is-Suq tal-Belt, Strait Street and the Valletta Design Cluster², and their immediate neighbourhoods.

Methodology

This is a mixed-methods approach comprising deductive and inductive avenues and qualitative and quantitative methods. Stages include an initial literature review leading to a theoretical framework that is piloted on the ground to become an analytical framework, followed by application of such framework to the case study areas to assess their physical urban design quality. A behavioural analysis (structured observations) and follow up expert interviews enable an understanding of broader, non-physical phenomena that are influencing the urban spaces. This feeds into Public Participation Geographic Information Systems (PPGIS) workshops, which provide this research with a bottom up perspective that is matched up with the results emanating from the other research stages.

Results

- *Stakeholder semi-structured interviews - textual analysis:* An in-depth textual analysis was carried out for the key stakeholders of each of the four projects under study, together with the Planning Authority. Clearly, agendas of individual stakeholders are diverse. As expected, the PA respondents are more concerned with strategic planning issues. More interestingly, there is a sharp contrast in the approach to the four individual sites – at the extreme ends, a community-driven and community-focused approach in the case of the Biċċerija project to a market-led and thematic-based approach in the case of Is-Suq tal-Belt. In between, the MUŻA project is also partly community-focused, although on an equal footing with the artistic credentials of the project, while the Strait Street project is driven mostly by artistic outcome and individual achievement.
- *Analysis of development planning applications in terms of change of use:* Most trends observed in 2016 remain valid, albeit with a few differences namely that from the 1993-2017 data the greatest potential impact of the development planning applications due to litter can be seen to be within Strait Street. The scale of potential impact in the 2012-2017 period is more significant than that for the 1993-2011 period in all categories and for all four sites. Again, all change of use applications in the Biċċerija area are for a higher commercial order, similar to the results achieved in 2016.
- *PPGIS workshop:* A second PPGIS workshop was carried out in November 2017 as part of the Valletta 2018 Foundation's annual conference. While the actual data generated from this workshop will be analysed in 2018, it is important to note that as a methodology, the majority of participants still

²The Valletta Design Cluster Project is currently being developed in the area commonly known as *Il-Biċċerija*

prefer the more personalised approach that is possible with physical mapping. Important controversies with regard to accessibility, land-use change and space appropriation are evident from a preliminary discussion held with participant's post-walkabout.

Way forward

In 2018, the following work is envisaged:

- Urban design socio-spatial analysis and behavioural analysis shall be repeated to gauge change that has occurred over the past years. The data shall be compared to that achieved in 2015/2016 to undertake a comparative analysis.
- Assessment of change of use applications and permits shall resume to gauge whether the trends observed to date repeat themselves in 2018 or otherwise. The data will be refined to gauge the impact of actual permits implemented on the ground, in addition to potential impact from all the development planning applications.
- Data from the PPGIS workshop carried out in 2017 shall be analysed and categorised to refine the socio-spatial framework that shall be developed. Both spatial and visual outputs (points of intensity/overlap of different themes) are envisaged.

Further convergence of the results obtained from the various stages will take place, to understand the socio-spatial implications on the four neighbourhoods in question.

Enriched by the results from the PPGIS, we shall be able to have an informed outlook as to the implications of change due to the cultural infrastructure and the resulting social/attitudinal and behavioural changes (vis-à-vis the different stakeholders) by having the direct involvement of the local community and an understanding of their needs, concerns and aspirations. This will provide the prelude for the repetition of the physical and behavioural analyses that will occur once again in 2018, which will subsequently enable us to monitor the degree of change that has occurred over the research period, leading to a potential multi-level framework and strategy to be defined within a post-2018 legacy.

4

THE TOURIST EXPERIENCE

THE IMPACT OF VALLETTA 2018 ON THE TOURISM SECTOR

Malta Tourism Authority

Objectives of research

The objectives of this research are 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. It also give insight into tourists' awareness of Valletta as a European Capital of Culture (pre-trip and during their trip awareness), and the levels of cultural participation.

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. Survey participants self-complete the questionnaire towards the end of their stay in Malta and return it to the Malta Tourism Authority via pre-paid post. The target audience comprises tourists residing in Malta's main source tourism markets, namely the

United Kingdom, Ireland, Italy, Germany, France, Spain, Netherlands, Belgium, Austria, Switzerland and the Nordic Countries.

The 'Heritage Locality Survey' is an ongoing research exercise. Questionnaires are distributed to tourists of any nationality who are visiting or staying in designated heritage localities (Valletta, Mdina, Birgu). The questionnaire is self-completed by respondents and returned by post via business reply service.

Results

2017 marked the eighth consecutive year of growth in inbound tourism, where a new record high was reached. The number of total inbound tourists to Malta amounted to 2.3 million. This is mainly the result of the significant increase in air connectivity, where a number of new routes were introduced.

During the period January to September, the share of total inbound tourists aware of Valletta 2018 prior to visiting Malta increased on a year-on-year basis for the last two years. The share of tourists aware of the event pre-trip increased from 27.8% in 2016 to 36.1% in 2017 (+8.3%). Research findings also show that during the first nine months of the year, the share of inbound tourists motivated to visit Malta by Valletta 2018 title increased from 2.6% in 2015 to 4.6% in 2017.

Furthermore, during the period January to June 2017, whilst the share of tourists visiting Valletta has remained relatively constant (90.3%) when compared to same period last year, the share of travellers opting to stay in accommodation establishment in the Valletta³ area registered an increase from 7.6% January to June 2016 to 9.2% January to June 2017.

For the period January to June 2017, the share of tourists 'greatly motivated' by Malta's cultural offer during choice of destination is higher for those who stay in accommodation establishments within the confines of the Valletta area (15.5%, 2017) than those who opt to stay in other localities (10.4%, 2017).

Way forward

The Traveller Survey and the Heritage Locality surveys are carried out by the MTA on a continuous basis. Data collection is planned to continue in 2018 through to 2019, and the identified indicators will continue to be monitored for the duration of these set timeframes.

As from January 2018, the growing inbound markets of Poland and Hungary have been added to the current list of countries targeted by MTA's Traveller Survey.

³ For the purpose of this study Valletta is defined as the Valletta and Floriana area.

5

THE VALLETTA BRAND

AUDIENCES' EXPERIENCES OF THE VALLETTA 2018 BRAND

Dr Emanuel Said

Objectives

The study aims to offer an insight into how audiences engage with the different forms of communication forming part of the Valletta 2018 communications programme. Longitudinal in nature, this project aims to determine the effects that each type of communications purport on different audiences as reflected in individuals' attitudes and behaviours.

Methodology

In acknowledging that audiences engage with brands through a multitude of encounters that range from direct instances⁴ to other indirect experiences⁵, the study adopts a mixed-methods approach involving real time experience tracking (RET) (Baxendale, Macdonald, & Wilson, 2015; Macdonald, Wilson, & Konus, 2012) as well as focus group discussions about audiences' perceptions on encounters and experiences with the Valletta 2018 brand.

Key to this methodology is the use of a smart phone app that offers an improved participant engagement with RET approaches. This app was developed by a

⁴ like advertising or actual event participation

⁵ involving 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)

subcontracted developer and questions that participants had to answer related to 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 91 participants used the new app in three waves of field work (one in 2016, two in 2017) to report on their experiences with a diversity of events forming part of the Valletta 2018 programme of events. These participants reported a total of 488 encounters.

By following the methodology of Asendorpf, Borkenau, Ostendorf, & Van Aken (2001) and Rammstedt, Riemann, Angleitner, & Borkenau (2004), participants categorised into three groups by relating to their personality characteristics. Indeed, 90 participants could be categorized in three personality types: resilient ($n = 47$), undercontrolled ($n=35$) and overcontrolled ($n=8$). One participant could not be categorized because her responses lay well outside the $z = \pm 3$ range.

As for brand experience (after Brakus, Schmitt, & Zarantonello, 2009), this study notes no discernible improvement in participants' impressions on their Valletta 2018 experience from the start to the end of the RET data collection (all paired t-test comparisons suggest no significant difference in sensory, behavioural and intellectual dimensions in responses at start and at end of the field work).

In 2016, most encounters reported related to Valletta Pageant of the Seas (93 encounters) followed by the Valletta Film Festival (57 encounters) and Ghanafest (36 encounters). In 2017, the most common encounters related to Valletta Film Festival (18 encounters) and Malta Jazz Festival (13 encounters) during the Summer wave, and, Notte Bianca (19 encounters) and Science in the City (16 encounters) in the Autumn wave.

Most encounters involved mere internet browsing, television viewing or chat with acquaintances face-to-face. However, it is the direct encounters (involving direct participation in events) that hold a bigger opportunity for value co-creation and satisfaction as evident from all waves of research so far. As for the specific events, in 2016 participants perceived the Malta International Arts Festival as the most important event, followed by Strada Stretta events and Malta Jazz Festival. In 2017, participants indicated the Malta Jazz Festival (Summer) and Notte Bianca (Autumn) as the most important events. The more satisfying encounters related to the Malta Jazz Festival, Strada Stretta events, Valletta Green Festival and Valletta Pageant of the Seas in 2016 – and – Malta Mediterranean Literature (Summer) and RIMA Digital Story Telling Workshop (Autumn) in 2017.

RET reflections and qualitative data captured from focus group discussions and interviews conducted in 2017 so far indicate five dimensions of value that can be co-created by actors, participants and other individuals involved in the co-creation network: social (or experiences that help participants engage with other individuals in a temporary or longer-term rapport), educational (or experiences that participants see as opportunities for learning or enriching), word-of-mouth or pride (or experiences that propagate positive word-of-mouth), relevance to one's interests (or experiences that are suited to the target audience) and access (or experiences that are accessible to participants from a logistical, time, language or economic perspective).

This analysis is ongoing and more insight is emerging as more RET data will be captured during 2018, offering bigger opportunities for data corroboration by relating to qualitative data captured from interviews and focus group discussions.

Way forward

During the second quarter of 2018, a bigger communications campaign (than the one adopted in 2017) shall be launched to attract more RET participants and gather more data to analysis of experiences that uncover patterns in brand engagement. RET data collection is planned to happen in two waves, the first wave taking place between April and June 2018 and the second wave taking place between the end of August and October 2018. This field work shall also comprise a variation in the way participants are engaged in the study as well as the use of more attractive incentives to encourage participation.

MEDIA ANALYTICS

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

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

7,931 mentions of the phrase “Valletta 2018” were registered across various online channels throughout 2017. 32% of mentions were on Twitter, whereas 43% were in the form of images or photos. The days with the highest number of mentions were 9th December (on the occasion of closing ceremony for Aarhus 2017 European Capital of Culture) and 27th September (when the Valletta 2018 Cultural Programme was launched).

Valletta 2018 was also mentioned in conjunction with various other events and activities that took place throughout the year, particularly in light of Malta’s hosting of the Presidency of the European Council in the first half of the year.

As of the end of 2017, Valletta 2018 had a total of 21,656 Facebook followers likes (an increase of 6,544 over the previous year), as well as 6,511 Twitter followers (an increase of 807) and 3,625 Instagram followers (an increase of 1,561).

The Foundation’s website was visited 203,053 times (+83% over 2016) by 141,241 (+86% over 2016) users throughout 2017.

Way forward

Monitoring of both online and print media will be ongoing throughout 2018, in order to gain further insight into the visibility of Valletta 2018 and its related activities during the ECoC year.



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 wider cultural sector, better understand the impacts of the European Capital of Culture title during the stages of planning, production and implementation.

Over the past years, and throughout 2017, the results from the various research studies presented within this booklet were utilised to help re-shape and re-think various processes and projects forming part of the Valletta 2018 Cultural Programme. The insights provided by this research also allow the Foundation to reflect more deeply into its own role within engaging with local communities and cultural practitioners. These reflections also extend beyond Malta's geographical confines, shedding light on the European and international dimension of Valletta 2018 projects.

The results of these various research studies are used internally by the various individuals and teams working within the Valletta 2018 Foundation, as well as other public entities and artists working within the local cultural sector. Full reports for each respective study, providing detailed information on the methodology and findings for each study, are published on the Valletta 2018 website and are freely accessible to all.

The Valletta 2018 Foundation augurs that although this extensive research process is being carried out in the years leading to and during 2018, a further evaluation of the ECoC may also occur in the medium term, post 2018.

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