MARKET PROFILE SURVEY

MALTA TOURISM AUTHORITY RESEARCH UNIT

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ABSTRACT

The Market Profile Survey is a tourist profiling exercise carried out by the Malta Tourism Authority with the objective of obtaining important insights on tourist behaviour (pre-trip, during trip, and post-trip), levels of satisfaction with elements of Malta's tourism offer and overall tourist experience. For the objectives of the Valletta 2018 Evaluation and Monitoring process, Market Profile Survey data will be used to formulate a profile of tourists opting to reside in accommodation within the parameters of Valletta and Floriana. The share of tourists who are greatly motivated by culture is significantly higher for those staying in accommodation in Valletta and its vicinity compared to tourists staying in other parts of Malta. Indeed, the former express an interest and higher participation in culture-related activities and events.

Keywords: Tourist profile, Cultural participation

INTRODUCTION

The Market Profile Survey is a tourist profiling exercise carried out on an ongoing basis by the Research Unit, operating within the Malta Tourism Authority. The project gives important insights on tourist behaviour (pre-trip, during trip, and post-trip), levels of satisfaction with elements of Malta's tourism offer and overall tourist experience. This market intelligence serves as the basis of the Malta Tourism Authority's decision-making processes in terms of marketing strategy, product and human resource development.

METHODOLOGY

The Market Profile Survey is a voluntary postal survey, with questionnaires distributed to tourists on their arrival at the Malta International Airport. Survey participants self-complete the questionnaire towards the end of their stay in Malta and return it to the Research Unit via pre-paid post.

The target audience comprises tourists residing in Malta's main source tourism markets, namely UK and Ireland, Italy, Germany, France, Spain, Netherlands, Belgium, Austria, Switzerland and the Nordic countries (Sweden, Norway, Denmark, Finland). Questionnaire distribution occurs daily (Monday to Sunday), targeting incoming flights from the aforementioned geographic markets. The survey is available in 6 language versions: English, Italian, French, German, Dutch and Spanish

Relevance to Valletta 2018 Evaluation & Monitoring Objectives
In relation to the objectives of the Evaluation and Monitoring process, Market Profile Survey data will:

- Enable the monitoring of trends in visitor profiles, experiences, perceptions, and preferences for the period 2015 – 2019.
- Serve to formulate a profile of tourists opting to reside in accommodation within the parameters of Valletta and Floriana.

Research Limitations
The Market Profile Survey is funded by the Malta Tourism Authority's budget allocation for market research, and the continuity of this study is reliant on the provision of such funds. The continuity of this project also depends on the research priorities of the Malta Tourism Authority, which may be subject to change during the timeframes of the Valletta 2018 Evaluation and Monitoring Project (2015 – 2019).

The Research Unit's data collection is currently outsourced to a contractor on the basis of a call for tenders. In relation to this, uninterrupted data collection hinges on the availability of data collection personnel and the ability of the contractor to meet the tender requirements set by the Research Unit.

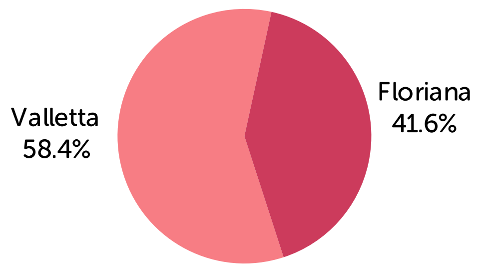
FINDINGS

Profile of Tourists residing in Valletta & Floriana

The findings presented hereunder are based on data collected over the period of January to June 2016. 7.9% of total respondents (190 out of 2,398) resided in accommodation facilities in Valletta/Floriana during their trip to Malta. This share is in line with last year's results.

The sample of 190 respondents is comprised of 111 residing in Valletta (58.4%) and 79 residing in Floriana (41.6%).

Figure 1: Locality of accomodation



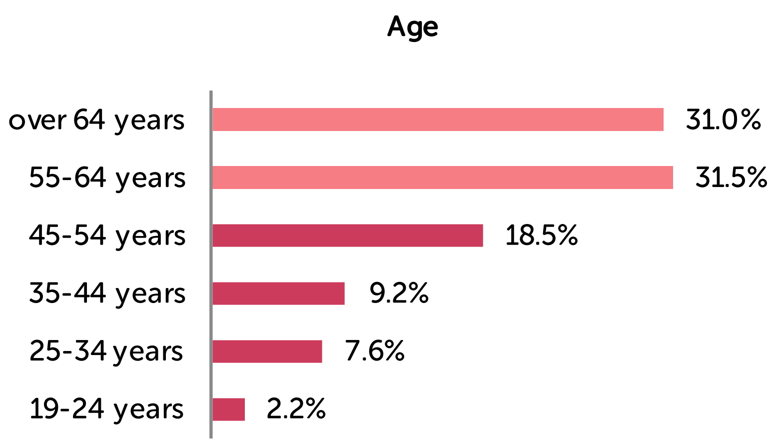
Socio-Demographic Profile

Respondents mainly came from the UK and Ireland (51.1%), France (16.8%), Germany (14.2%), and Italy (4.2%). There was a prevalence of female respondents, with a share of 56.7% compared to 43.3% male respondents. A significant percentage of respondents lived with their spouse or partner (65.1%).

The majority of survey participants had a tertiary education (67.4%) and were mostly employed full-time (39.2%) or retired (38.2%). Average net monthly income was estimated at €3,677. The average age of participants was 56.4 years.

Figure 2: Country of Residence & Age

Country of Residence	
UK & Ireland	51.1%
France	16.8%
Germany	14.2%
Italy	4.2%
Scandinavia	3.7%
Belgium	3.2%
Switzerland	3.2%
Netherlands	1.6%
Spain	1.1%
Austria	1.1%



Sources of Influence in Choosing to Visit Malta

Recommendation by friends/relatives featured to be the most influential communication channel to visit Malta influencing 39.5% of respondents. Internet ranked second (35.8%). The internet is followed by other information channels including travel guide books, tour operator brochures/websites, newspaper and magazine articles, and books. In comparison with last year, the share of respondents influenced by friends (+4.2 %) and the internet (+8.8 %) is relatively higher.

Novelty of the destination featured as the prime influential factor for choosing the Maltese Islands (61.6%). Two out of five respondents chose Malta as there were good flight connections whilst slightly more than one out of three respondents were influenced to come to Malta since English is spoken widely. Other influential factors mentioned were cost value for money, as a result of previous visit and Maltese hospitality.

Figure 3: Sources of Influence - Communication Channels

Sources of Influence - Communication Channels (Multiple Response)	
Recommendation by friends/relatives	39.5%
Internet	35.8%
Travel guide book	16.3%
Tour Operator brochure/website	13.2%
Newspaper/magazine article	6.8%
Books	6.8%

Reasons for Choosing Malta

The categorisation and measurement of cultural tourists is based on respondents' replies to the question on main motivations for visiting Malta. The cultural tourists visiting Malta are classified into two categories 'the greatly motivated' and 'the motivated in part'. 'The greatly motivated' are people who travel to a destination specifically because of its cultural opportunities, such as museums, cultural festivals and theatre. On the other hand, 'the motivated in part' are persons who travel both because of cultural opportunities along with other motivations such as sun, sea and leisure.

Figure 4: Sources of Influence - Influential Factors

Sources of Influence – Influential Factors (Multiple Response)	
Novelty of the destination	61.6%
Good flight connections	40 %
English spoken widely	35.3%
Cost/value for money	25.3%
Previous visit	24.2%
Maltese Hospitality	17.4%

Tourists opting to stay in Valletta/Floriana exhibit a relatively high interest in history and culture. In fact, 24.7% can be termed as 'greatly motivated' by culture in their decision to visit Malta. In comparison, tourists staying in other parts of the island who are 'greatly motivated' by culture represent a lower share of 11 %.

The estimated share of tourists staying in Valletta/Floriana who are 'motivated in part' by culture (40 %) is in line with the share of tourists staying in other parts of Malta (40 %).

Figure 5: Segmentation of Cultural Tourists

Segmentation of Cultural Tourists		
	Tourists residing in Valletta /Floriana	**Tourists residing in other parts of Malta**
'Greatly motivated': People who travel to a destination specifically because of its cultural opportunities, such as museums, cultural festivals and theatre.	24.7%	11%
'Motivated in part': Persons who travel both because of the cultural opportunities along with other motivations such as sun, sea, and leisure.	40 %	40%

Trip Booking Arrangements

On organising their trip to Malta, the majority of respondents preferred to book travel components independently (71.8%). A further 21.8% opted for a holiday package, and the remaining 6.4% booked a combination of package and non-package travel products.

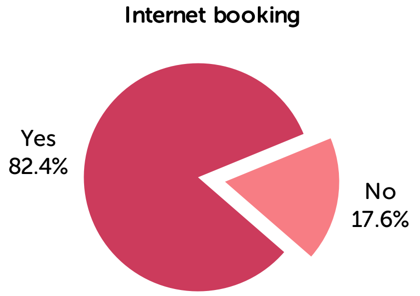
Tourists residing in Valletta/Floriana are more inclined to book a non-package type of trip (71.8%) compared to those staying in other parts of Malta (36.9%).

Similar to last year, around four out of five of respondents booked aspects of their trip to Malta via the internet, particularly flights and accommodation. Some respondents also booked visits to sites and attractions (5.5%) and bought event tickets (4.4%) online.

Figure 6: Type of Booking

Type of Booking	
Package	21.8%
Non-Package	71.8%
Partly Package / Partly Non-Package	6.4%

Figure 6 (continued): Type of Booking

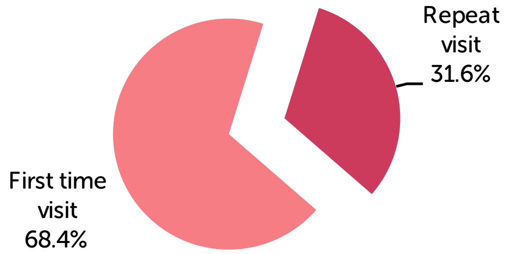


Trip Components Booked via Internet	
Flights	83 %
Accommodation	82.4%
Transfers	22.5%
Vehicle Hire	11 %
Site / Attraction visits	5.5%
Event tickets	4.4%
Excursions	1.1%

Visit to Malta

Similar to last year, around three out of ten respondents were on a repeat trip to Malta.

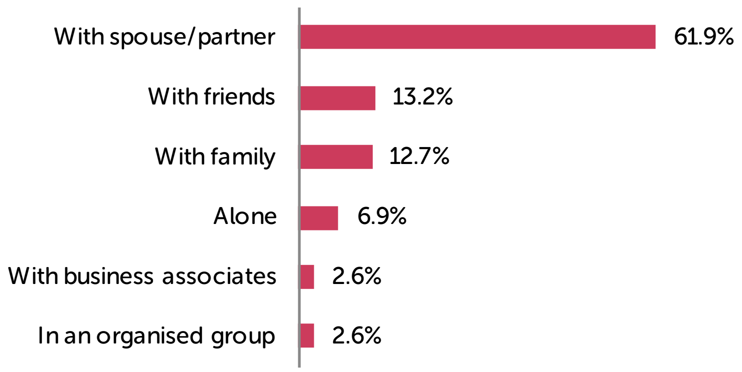
Figure 7: Visita to Malta



Travelling Party

Respondents were mainly travelling with their spouse/partner (61.9%). A further 25.9% were travelling with family members or friends. Solo travellers represented a share of 6.9%.

Figure 8: Travelling Party



Accommodation Stayed in Valletta & Floriana

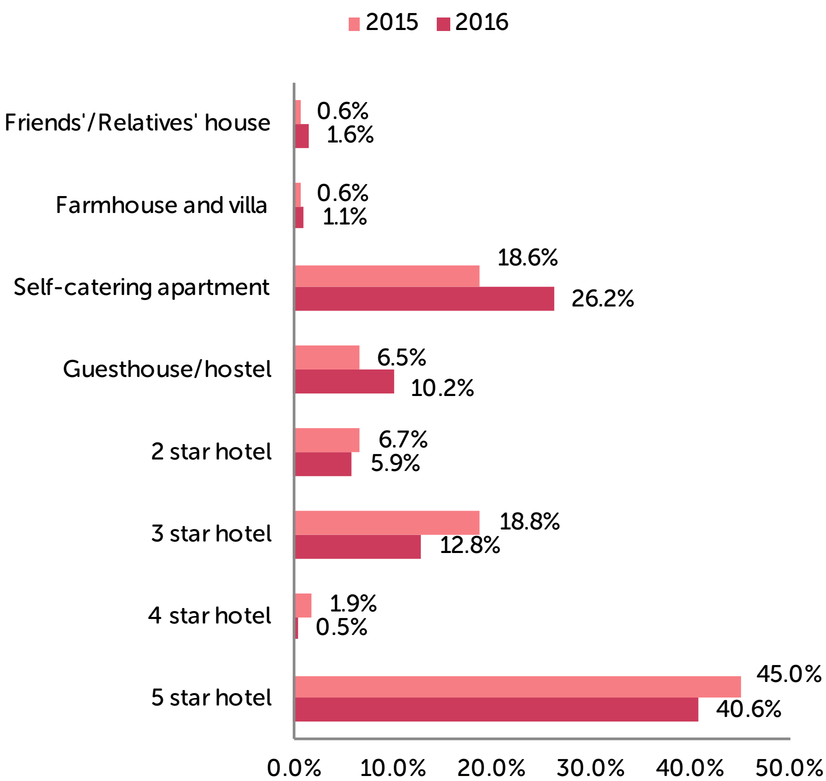
Seven in ten respondents opted for serviced accommodation, namely 5-star and 3-star hotels (40.6% and 12.8% respectively). The remaining 29.9% stayed in self-catering or private accommodation.

Bed and breakfast was the most preferred accommodation basis (59.2%), followed by self-catering (20.7%).

Survey results indicate that in comparison to last year, the share of respondents staying in self-catering/ private accommodation is higher (+8.7 %) whilst the share of tourists staying in 3-star accommodation experienced a decline.

Further analysis shows that tourists residing in Valletta (excluding Floriana), mainly stayed in 3-star hotels (22.2%), self-catering apartments (34.3%), 2-star hotels (10.2%) or guesthouses/hostels (17.6%). Amongst tourists residing in Floriana, 5-star hotel accommodation was the prevalent option (92.4%).

Figure 9: Type of Accomodation



Activities Engaged in whilst in Malta

For the purposes of this project, comparisons were drawn between tourists residing in Valletta/Floriana and tourists residing in other parts of the Malta during their trip. It is worth noting that tourists staying in Valletta/Floriana have a higher participation in culture-related activities when compared to tourists staying in other parts of Malta. Indeed, the former have a higher engagement in terms of visits to museums, churches, historical buildings and temples/archaeological sites. Likewise, there is also a higher engagement in events such as live music events/concerts, local festival events and the performing arts.

Multiple Response

The share of participation in the various cultural activities is in line with last year's results (this includes those elements which could be compared due to the revamped Market Profile Survey launched in 2016).

Figure 10: Cultural Participation

Cultural activities engaged in:	%	%	Cultural events attended:	%	%
Sightseeing	92.1%	91.2%	Attend theatre/ musical/opera/ dance	7.9%	2.8%
Visit temple/archaeological sites	54.7%	49 %	Attend live music event/ concert	11.1%	3.6%
Visit historical buildings	86.8%	77.6%	Attend local festival/event	15.8%	10.7%
Visit museums	69.5%	46.6%	Attend traditional religious feast	7.9%	4.6%
Visit churches	83.7%	69.5%	Attend visual arts event	4.2%	2.8%
Visit arts/crafts sites	20 %	25.6%			
Visit local produce sites /agro-experiences	8.9%	10.5%			

Tourists residing in Valletta & Floriana

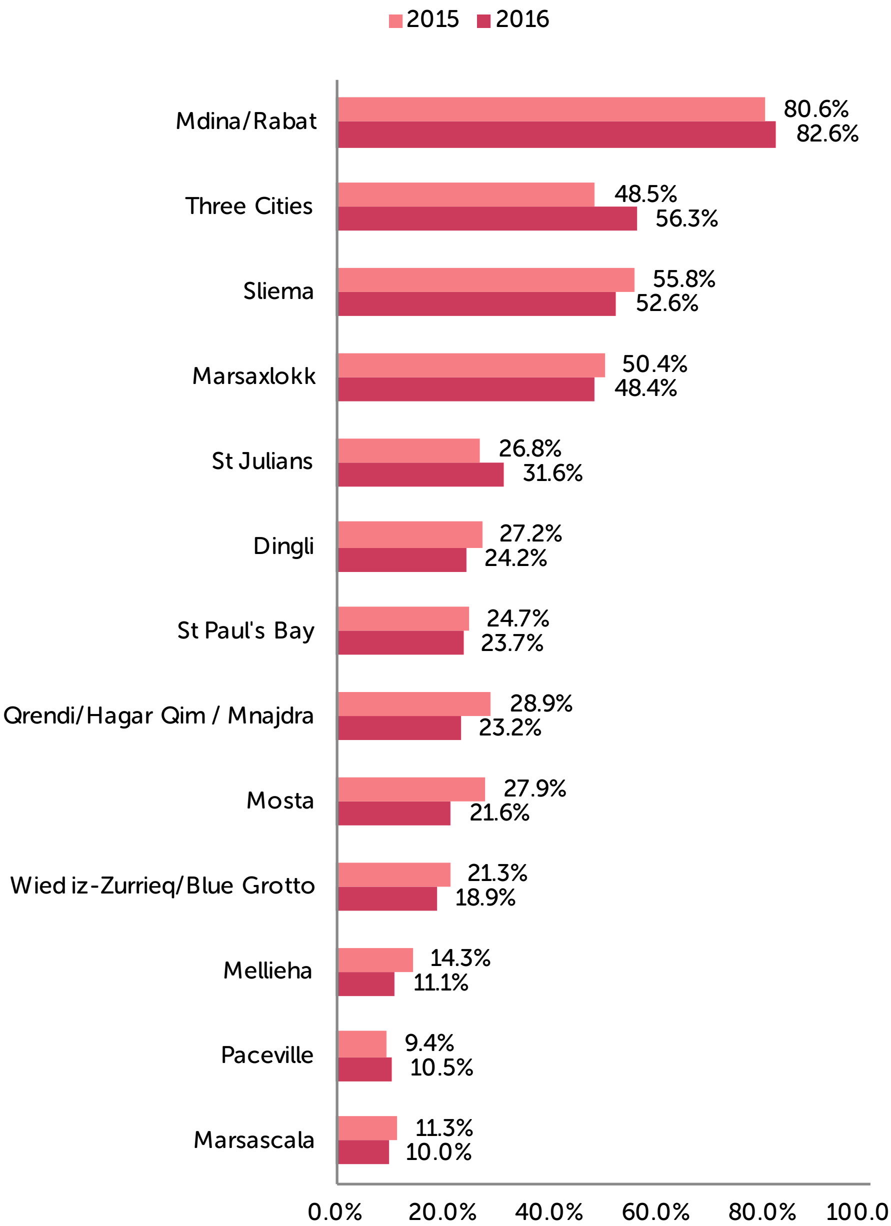
Tourists residing in other parts of Malta

Localities Visited During Stay in Malta

Tourists residing in Valletta/Floriana also expressed an interest in other historic localities, and have visited Mdina/Rabat (82.6%) and the Three Cities (56.3%) during their stay. Coastal areas were also highly visited, particularly Sliema (52.6%), Marsaxlokk (48.4%) and St.Julians (31.6%)

Compared to last year, the share of respondents visiting the Three Cities is relatively higher (+7.8 %).

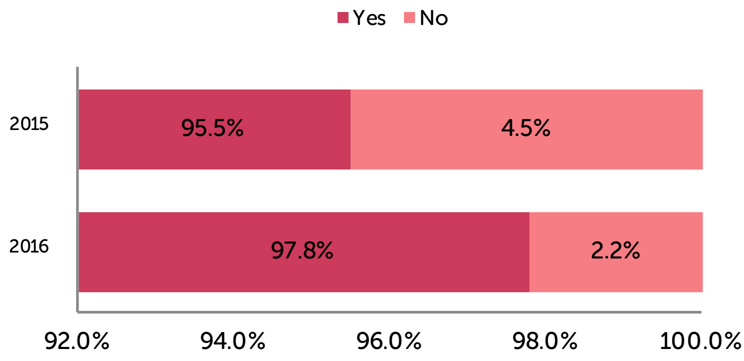
Figure 11: Localities visited in Malta



Recommending Malta and Intention to Visit Again

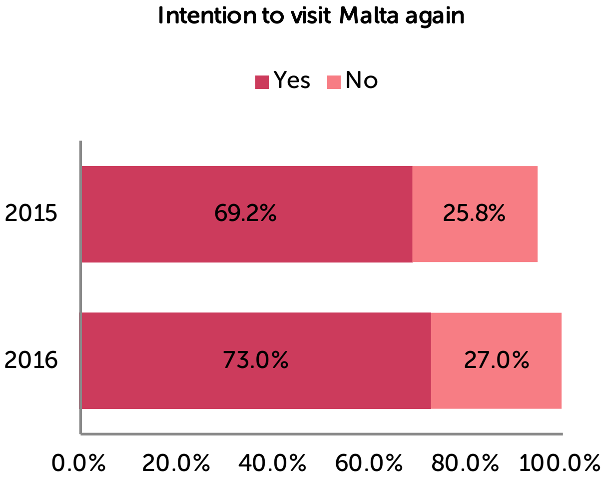
The overwhelming majority said that they would happily recommend Malta to friends and relatives (97.8%). Compared with last year's figures the share of tourists willing to recommend Malta registered an increase of 2.3 %.

Figure 12: Willingness to recommend Malta



Following a positive experience in Malta, a substantial 73 % expressed an intention to re-visit Malta in the near future, mainly in the next one to two years (39.2%) or in five years or more (24.2%). Compared to last year's figures, the share of tourists willing to visit Malta again registered an increase (+3.8 %).

Figure 13: Intention to visit Malta again

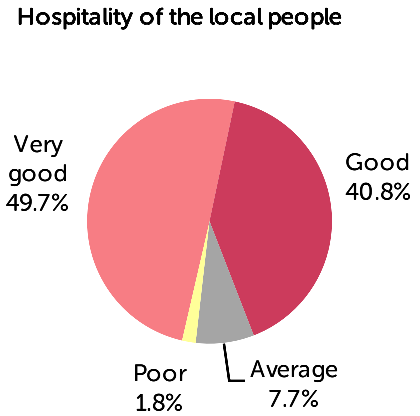


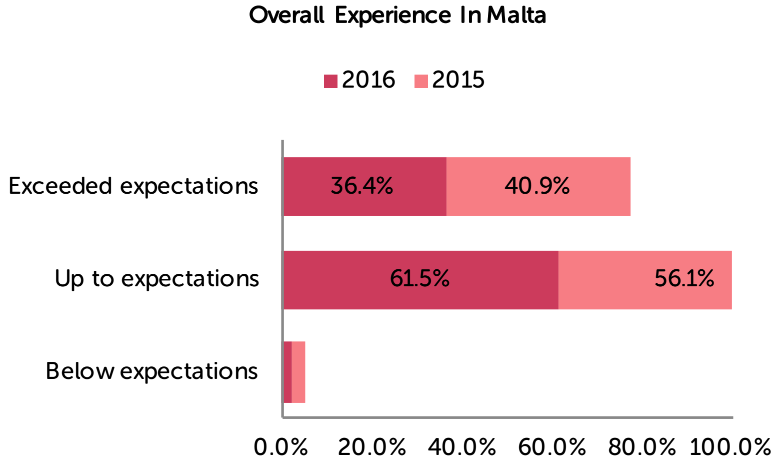
Intention to visit Malta again in:	
Less than 1 year	13.3%
In 1 to 2 years	39.2%
In 3 to 4 years	23.3%
In 5 years or more	24.2%

Overall Impressions

An important aspect of the tourist experience is the positive interaction with the host community. In this regard, 90.5% of survey participants were impressed by the local people's hospitality. Furthermore, most respondents expressed satisfaction about their overall experience in Malta, with 61.5% saying that Malta met their expectations and a further 36.4% noting that their expectations were exceeded. The share of tourists stating that their overall experience in Malta exceeded expectations declined from 40.9% in 2015 to 36.4% in 2016. Furthermore, Malta met the expectations of more tourists.

Figure 14: Overall Impressions





CONCLUSIONS & WAY FORWARD

A key aspect that emerges from the foregoing exercise is that for tourists staying in the parameters of Valletta, history and culture takes a more prominent role in destination choice compared to tourists staying in other parts of Malta. Indeed, the former express an interest and higher participation in activities and events that are of a cultural nature.

The Market Profile Survey is being carried out on a continuous basis, and once data for the entire year 2016 is compiled and analysed, it will serve as the base year for the Valletta 2018 Evaluation and Monitoring process. Data collection will continue in 2017 through to 2019, and the identified indicators will be monitored for the duration of these set timeframes.

The current Market Profile Survey has been revamped and re-launched in January 2016. The survey has been adapted to better cater for new trends in trip behaviour but has maintained all core indicators and therefore the continuous provision of the selected indicators for Valletta 2018 Evaluation and Monitoring process will not be put at stake.

CONCLUDING REMARKS

Tourism has long been a pillar of the local economy, and the European Capital of Culture title will undoubtedly be influential in the tourism landscape throughout the upcoming period. The studies carried out by the Malta Tourism Authority delve deeper into this influence in order to understand the way in which incoming tourism is being affected by Valletta 2018 and the cultural, social and economic regeneration taking place.

The studies so far indicate that the ECoC title is does indeed have a bearing on the decision made by incoming tourists to visit Malta, with a growing proportion of visitors aware of Valletta's ECoC title and the cultural activity taking place within the city. These indications will continue to be analysed over the coming years to obtain a more complete understanding of the impact of Valletta 2018 not only on local communities, but also on a broader international scale.