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Malta's candidature for the title of European Capital of Culture 2018: the cultural tourism perspective

A honorary title with tourism impact

In 2018 Malta will be hosting the European Capital of Culture (ECOC), together with a city from the Netherlands. During one year, this honorary title offers to the chosen city a unique chance to showcase its cultural life and cultural development in the fierce competition for the international cultural tourist. Being an excellent city marketing instrument, the ECOC designation leads to more visitors, more overnight stays (+ 12 % on average) and more expenses. The ECOC case proves that culture is increasingly used as a distinctive asset in destination marketing. A growing number of countries, regions and cities are presenting themselves as cultural destinations by profiting from the characteristic identity culture gives to a place. However, the presence of an interesting cultural offer is not a guarantee for success. If acquiring a strong position on the tourism market is desired, an effective marketing strategy is essential for attracting the cultural tourist as we will show in this article that discusses the cultural tourism impact of the ECOC event from both the demand side (the cultural tourists) and the supply side (the cultural offer).

The present cultural tourist market of Malta

When developing a cultural tourism strategy for the ECOC event, it is first of all necessary to have insight into the needs and wants of the current and potential visitors of the destination. Market analysis of inbound tourism by the Malta Tourist Authority reveals that, after climate and novelty, history and culture rank as the third main motivator for choosing Malta as a holiday destination. In figures, the cultural tourism market is the second largest tourism segment including niches like crafts tourism, pilgrimage travel and gastronomic tourism. As appears from the evolution of the cultural tourism market during the period 2006-2009, the segment can be qualified as rather stable with an average share of 13% out of total inbound visits (table 1).

Year	Total number of tourists	Number of tourists with history & culture as visit motif	Market share
2006	1,187,733	148,603	12.5%
2007	1,243,512	158,610	12.8%
2008	1,290,858	157,640	12.2%
2009	1,182,489	170,000	14.4%

Table 1. Evolution of the cultural tourism market of Malta (source: Malta Tourist Authority).

The outcomes of the national study by the Malta Tourist Authority match the results of the international ATLAS Cultural Tourism Research Project. Launched in 1991, this project attempts to answer basic questions about cultural tourists, their motivations, profile, behaviour and attitudes and to shed light on important issues such as marketing and management of cultural tourism (www.atlas-euro.org). Since the start two decades ago, approximately ten international research rounds have been undertaken, including more than 40,000 interviews with visitors to cultural attractions. The research results show that cultural tourists in general tend to visit attractions that can help them to improve their knowledge about the destinations they visit, and that these attractions in most cases are their main motivation to visit the destination. In terms of types of cultural attractions visited, museums, monuments and historic sites are the most popular. This outcome underlines the dominant role of heritage related attractions in the consumption patterns of cultural tourists. Indeed, cultural events, such as concerts and dance performances, are visited by relatively few tourists due to practical obstacles related to the limited time period of operation, obtaining tickets and language barriers.

The same goes for the visit pattern of cultural tourists in Malta. The vast majority of tourists go sightseeing and visit historical sites, museums and churches. With regard to cultural events, survey results reveal that theatrical performances, dance and operas are less popular than outdoor events, like village feasts and concerts (table 2).

Cultural Activities	%	Attend cultural events	%
Go sightseeing	85.1	Theatrical performance	2.2
Visit historical sites	76.4	Dance	1.6
Visit museums	51.9	Opera	0.4
Visit churches	67.9	Music/concert	5.5
Visit arts/crafts sites	31.8	Festas/folk/festival	12.0
Visit local produce sites	17.7	Visual arts	2.8

Table 2. Visit pattern of cultural tourists in Malta (source: Malta Tourist Authority, *Market Profile Survey*, 2009).

According to the ATLAS surveys, the profile and the motivation of cultural tourists have little changed since 1990: they are well educated people, having high status occupations and good incomes, who want to discover, experience and broaden their cultural knowledge. The present cultural tourist visitor of Malta too belongs to this category of the so-called *culture seeker*. Another important point in common is that the average percentage of 13% market share resulting from the research by the Malta Tourist Authority corresponds to the estimates from the ATLAS surveys which indicate that this specific kind of cultural tourism accounts for about 10 to 15 % of the European cultural tourism market.

A cultural tourism product is more than the cultural tourism supply

The next step in this market research is to analyse the supply side in order to know if it meets the demand of the future ECOC visitor. When considering the entirety of the Maltese cultural tourism offer (museums, monuments, routers, events), there is one strength that immediately catches the eye: the omnipresent built heritage which is promoted by the official Malta Tourism Website in the following terms: *In Malta, you'll explore 7000 years of history yet live passionately in the present (...) the Islands' scenery and architecture provide a spectacular backdrop. The Maltese Islands have been described as one big open-air museum(...).What makes them unique is that so much of their past is visible today. Delve into the Islands' mysterious prehistory, retrace the footsteps of St Paul or see where the Knights of St John defended Christendom.* (www.visitmalta.com) (figure1).



Figure 1. A key aspect of the tourist image of Malta: Fort Saint Elmo in Valetta (photograph by the author).

It should be noticed, however, that the presence of a valuable cultural tourism supply is in itself not sufficient to attract tourists. Therefore, it should be embedded in a whole of additional facilities and services offered by tourist organizations and travel intermediaries, accommodation suppliers, the catering industry and the retail business, and also in an adequate transportation infrastructure. Only then one may speak of a complete cultural tourism product (figure 2). Since Malta is a professionally organized, well equipped and very accessible tourism destination, all the elements and conditions necessary to develop successfully the ECOC as a cultural tourism product are available.

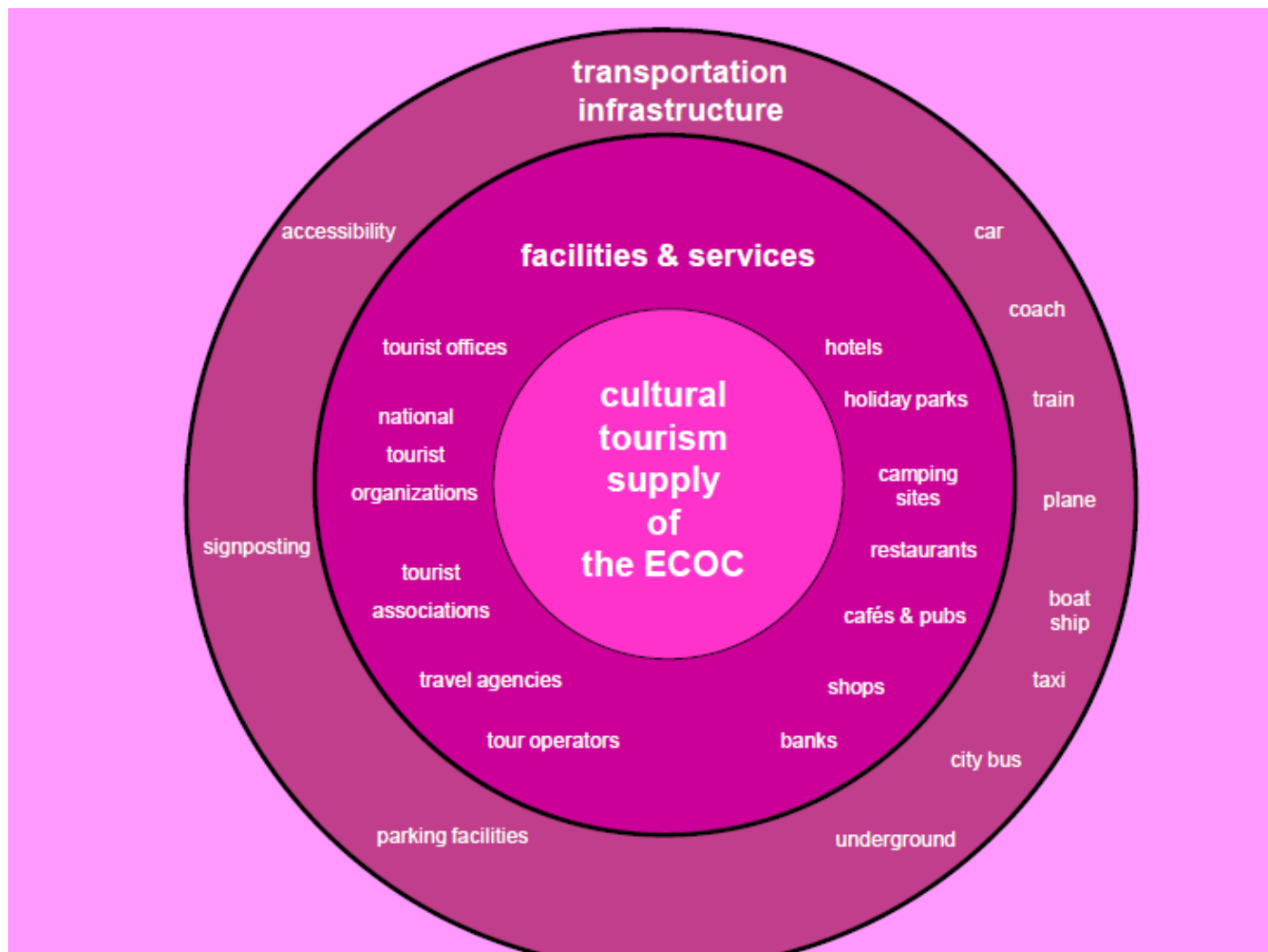


Figure 2. The ECOC as a cultural tourism product.

Strategic objectives of Malta ECOC 2018 compared to common aims of ECOC cities

The preceding analysis of the marketing environment provides useful input for the development of a cultural destination marketing policy, starting with the setting of strategic goals. The Maltese Inter Ministerial Commission ECOC has already fixed the following strategic objectives for Malta as a ECOC candidate:

- *Education for creativity*

To strengthen, and, wherever lacking, develop structures for the professional formation of artists, cultural managers, and heritage conservators. This is done through the review of existing educational structures and the development of new and properly equipped formation centers.

- *Creative Excellence*

To further develop Malta's cultural infrastructure and to provide support to the core-funded cultural entities and to the artist and cultural community, with the aim of improving citizens' quality of life, with particular emphasis on the needs of children and youths.

- *Creative Economy*

To ensure that the necessary investments and technological upgrades are made in the cultural based creative economy, as well as to provide the supportive environment for the flourishing of cultural entrepreneurship, cultural tourism, and other related areas which generate jobs & wealth.

(Source: Maltese Inter Ministerial Commission ECOC, News letter, Issue 1, December 2009)

It is interesting to compare these strategic objectives with the common ECOC aims based on an overview of the policy programmes. Apparently, ECOC host and candidate cities formulate similar aims in the field of marketing, economy, culture and society not only in order to satisfy the selection criteria of the Council of the European Union but also to benefit as much as possible from the impacts of the ECOC event (table 3).

Field of action	Aims	Impacts
Image enhancement	Raise the international profile of the city	Increased awareness of the host city
Economic benefits	Attract visitors from the own and other countries	More tourism More cultural funding More culture sponsoring
Cultural development	Run a cultural programme Stimulate the long-term cultural development of the city	Increased cultural production and participation New cultural venues Better networking in the cultural sector
Social outcomes	Expand the local audience for culture Stimulate citizen participation and involvement of the local population Enhance feelings of pride and self-confidence	Increased local pride and social cohesion

Table 3. Common points of ECOC policies.

Image enhancement seems not to take priority within the Maltese ECOC policy. It is true that a number of European cities have used the City of Culture year to transform their cultural base and, in doing so, the way they are viewed internationally, but Malta already has a strong image in the cultural tourism market thanks to the uniqueness of its built heritage.

On the contrary, *economic benefits* form explicitly part of the Malta's ECOC ambitions. The policy document emphasizes the necessity to stimulate the development of the creative economy by means of financial investments, support of cultural entrepreneurship and of cultural tourism as motors for jobs and wealth.

With regard to *cultural development* the Maltese ECOC strategy focuses on two main objectives: education on creativity consisting of professional cultural and artistic formation on the one hand, and, on the other, creative excellence by means of the development of the cultural infrastructure and of the artist and cultural community.

Finally, by improving the quality of life of Malta's citizens, cultural development is also used as a means to realize the *social outcomes* of the ECOC project.

Tourism product-market combinations for Malta as ECOC

On the basis of the tourism market analysis and the strategic objectives of the Malta ECOC policy, the market growth policy can be determined. What are the most interesting tourism product-market combinations for Malta as an ECOC-destination? The first option is *market penetration*: offering the existing cultural tourism product to the existing cultural tourist market, either by broadening the market (= attract more cultural tourists) or deepening the market (= stimulate repeat visits by cultural tourists). Exploiting this product-market combination is worth while as the ECOC-event is an excellent instrument not only to broaden, but also to deepen the market by generating repeat visits since new events represent by definition an added value for the permanent cultural supply.

Another possibility is *product development*, aimed at the introduction of new cultural tourism products which can appeal to the existing cultural tourist market. Creative tourism, for instance, could become a profitable niche market for Malta. This kind of tourism "offers visitors the opportunity to develop their creative potential through active participation in courses and learning experiences which are characteristic of the holiday destination where they are undertaken" (Richards and Wilson, 2006). Applied to the Maltese culture, creative tourism could be developed through interactive workshops for tourists focusing on regional gastronomy (making cheese, wine or an olive oil blend, preparing traditional dishes like Kapunata, the Maltese version of ratatouille), traditional crafts (pottery-baking, lace-making,

creating silver jewellery), folk dancing (e.g. *Il-Maltija*, a typical Maltese court dance) and folk singing (e.g. *għana*, poetry set to music). The time is ripe for the development of creative tourism because Maltese crafts and folk music have undergone a revival in recent years. At the same moment, they are gaining in importance as attractions for tourists witness their general visit pattern (see table 2) and the fact that a yearly growing audience is attending the Għanafest, the Malta Mediterranean Folk Music Festival where Malta's musical heritage is brought to the forefront with a strong emphasis on authenticity (www.maltafolkmusicfestival.org). This evolution should be considered against the background of the so-called *localisation* trend. Rejecting the international cultural uniformity caused by globalisation, locals as well as visitors show a renewed interest in the identity, history and culture of people and places. Consequently, with respect to the ECOC aims, stimulating creative tourism is beneficial not only to the economic and cultural development of Malta, but also contributes to the realization of the social objectives by enhancing awareness of the own identity with the local population.

The most risky market growth policy is *diversification*, consisting in creating new cultural tourism products for new cultural tourist markets. A new market could be *the cultural omnivore* who represented more than one third of the ECOC visitors surveyed by ATLAS in 2001 (Rotterdam, Porto) and 2002 (Salamanca). The emergence of this type of cultural tourist who is different from the traditional culture seeker can be explained by the breaking down of the barriers between different forms of culture in the post-industrial society. Cultural omnivores combine traditional 'high' culture (such as museums, monuments and opera) with 'popular' culture (such as theme parks, pop festivals, dance events and urban youth culture). They are real "culture vultures", eager to taste each element of cultural supply they find on their way during the numerous trips they undertake. Events like ECOC create the alliance of elite and popular art these "zapping" culture consumers are looking for. However, the question is whether this product-market combination would really be a fruitful option for Malta. Given the strong cultural-historic image of Malta as a tourist destination, it would be a hell of a job to attract the cultural omnivore as a new cultural tourist target group. It would imply the launching of a long-lasting and costly marketing campaign in order to create an (additional) image of Malta as a place where innovative and experimental cultural projects are thriving. This choice would not be a wise one as learns the lesson of Bruges ECOC 2002, a city that has an iron historical image in common with Malta. One of the aims of the ECOC project was to realize an image shift from a traditional tourist-historic city to a modern culture city, but visitor surveys show that, after the event, the image of Bruges is still determined by the medieval town architecture and the pleasant atmosphere. For Malta too, investing in a new image would be a waste of time and money, all the more since the space of time up to 2018 is too short for an effective campaign. It is a far more appropriate policy to cultivate and to exploit the present image of a traditional cultural tourist destination within the framework of market penetration and product development as logical market growth strategies.

Rules of thumb

Summarizing, in the case of Malta, an effective ECOC tourism market strategy should rest on the following basic guidelines:

- *Know your market* by making use of reliable facts, figures and analysis concerning the needs and the wants of the cultural tourist, data and studies which can be provided by the national tourist organization and research institutes.
- *Don't compare apples with oranges* and learn above all from the knowledge, insights and experiences gained by ECOC-cities of the same kind, i.e. with a comparable cultural supply and a comparable visitor's market.
- *Do the things you are good at* by founding the ECOC product and market development strategy on the obvious strengths and the proven attractiveness of the existing cultural tourism product.

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