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PHASE 1 DATA GATHERING REPORT: OCTOBER 2018

Contents

Page

1.	Executive Summary – Research Phase	3
2.	Our Conclusions and Recommendations	5
3.	Proposed Next Steps for Phase 2	7
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4.	Geopark Consultation Interviews – Our Findings	11
5.	SWOT Analysis	17
6.	Defining the Target Market/Visitor Classification	20
7.	Headline Tourism Research	22
8.	References/Bibliography	25
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Appendices:

Geopark survey summary Data- Append 1
List of Consultee UGGps – Append 2

Background documents available:

Review of Sustainable Tourism
Review of UGGp Tourism Strategies
Review of Sustainable Transport/ The LOHAS Segment

Please note: Images included in this document were taken at the 8th International Conference on UNESCO Global Geoparks in Adamello Brenta by Jayne West and Kevin McLean.

1.0 Executive Summary – Research Phase

This report summarises findings from our data gathering exercise and concludes Phase 1 of this project. We have engaged with 29 UGGps, half of which were face-to-face interviews at the 8th International Conference on UNESCO Global Geoparks in Adamello Brenta. Those interviews were of course particularly valuable. We are immensely grateful to all the UGGps who gave their time.

1.1 Some quite startling figures to begin our report (extrapolated from survey responses). The economic value of UGGps globally starts to become clear, with an estimated 280 million visitors a year, representing 6.28% of all world tourism spend at €283billion and associated employment of 19.65 million people.

[Section 4.1 Page 10]

1.2 The strong theme emerging was the *connections between the land (geo) and people (park)*, where this is exemplified by sampling local food/products and using local guides etc but is also revealed in a more philosophical sense, meaning that UGGps serve to educate/remind visitors about how the land came to support people and how people live within the land.

[Section 4.2 Page 11]

1.3 There was unanimous support from our sample for UGGp to be better known, one important qualification being that they did not want UGGps to become overrun with tourists. Any marketing and promotion needed to be aware of the issue of over-tourism. It was more about the quality than the quantity of visitors, in some cases; attracting the right kind of visitor, rather than attracting all visitors, regardless.

[Section 4.4 Page 13]

1.4 We should say that, on the whole, UGGp is in a position of strength, not weakness. It seems to us that there is more that is working than that which needs fixing. Which is not to say that there is any room complacency. There is, to quote several interviewees, 'much work to be done'. But our overriding impression was that the elements are in place to create a powerful and successful brand, they just need some organising and re-arranging and pulling together.

[Section 5.0 Page 16]

1.5 Of particular interest is the analysis of 64 countries Voluntary National Reviews in relation to the SDGs 2030, where tourism was strongly recognised not only as a driver, but also as an accelerator the achieving the SDGs. However, goals that were not well referenced but where UGGps might demonstrate strong connections included Good Health and Wellbeing (SDG3) and Quality Education (SDG4). So the UGGp connection to the SDGs represents not only a strength, but also an opportunity for UGGps and the network to take ownership and leadership of these goals within their individual territories and on a global basis.

[Section 5.1 Page 16]

1.6 As we argue in this document, making Earth Heritage and the Earth Sciences accessible and interesting may be one of the keys to continued success of UGGp. In our view, this means looking at the geological aspects, whenever possible, through a cultural lens. We suggest that only a very, very small number of people out there are interested in rocks *per se*. But everybody is interested in people, so the angle to pursue, which we realise is an aim or an aspiration of most UGGps, is how the land links to the people living there, in the past, now and going into the future.

[Section 5.1 Page 17]

1.7 This leads to the point that another of UGGPs' strengths is the local community aspect. We observe that this is often talked up, but is not always clear or prominent in how UGGps describe themselves. So while it is a strength, it is also an area for potential development, in terms of engagement within GP communities and the interaction between visitors and local people, products and culture.

[Section 5.1 Page 17]

1.8 A key opportunity identified was to communicate more internally, with various key stakeholders (e.g. residents, business people, tourist authorities, politicians), possibly using content that could be developed centrally and adapted for local consumption. This in turn pointed to the issue that there could be greater sharing of communication templates, content, resources which all UGGps could use, as appropriate, given that UGGps shared similar kinds of communication needs but may have quite limited resources of their own.

[Section 5.2 Page 17]

1.9 The communication task is hampered by the host of different descriptions, signs and symbols being used already. The effect of this is to obscure rather than to clarify what a UGGp is, which counts against raising awareness of UGGps and the network. This is tricky as there are a number of partnerships, regulations and designations that UGGps must recognise, which are specific to them and their territories. UGGps may contain World Heritage Sites or other partner programmes. Some contain or touch on national parks or similar designations. While acknowledging that UGGp in its current, UNESCO-backed form has only existed for a few years, raising awareness is important to the longer-term success of the project. This is all the more reason that messaging and signage has to be visible, simple and clear.

[Section 5.3 Page 18]

1.10 The tagline for the Geoparks is: *Celebrating Earth's Heritage and Sustaining Local Communities*. The UNESCO (SDGs) reiterate and consolidate that mission. Whilst this works for the Geopark community, is this tagline the right one for the public? Does it articulate the message for tourism customers? Could a new tagline better communicate the shared and inspirational values of the network?

[Section 5.3 Page 18]

1.11 One issue that was revealed as an organisational weakness was the lack of internal network management resource, and the implications this could have when it comes to bringing about some of the changes or measures which may be necessary to create UGGp as a public-facing brand. The flip side of this, however, is that by raising the profile of UGGp and helping GPs to raise more revenue, more resource could be made available to do the kinds of things we are describing.

[Section 5.3 Page 18]

1.12 We have concluded from the UGGp survey and visitor surveys supplied by Geoparks that while many have a typical profile of visitor, across the entire network there is no specifically definable common group of end user. This presents a challenge in developing phase 2 of the project, as the action plan needs to define target groups to communicate with in order to promote the agreed brand messages (see 1.14).

[Section 6.0 Page 19]

1.13 We considered current and developing trends in 'sustainable marketing', in order to explore how consumer attitudes and behaviours in relation to sustainability vary globally. This helps us to define a target group that aligns with the UGGp core values, to inform tactical activity in the action plan, with a view to 'market testing' the UGGp brand with this group.

[Section 6.0 Page 19]

1.14 The LOHAS (Lifestyle of Health and Sustainability) segment presents a targeted and focused group of consumers to engage with via the action plan. As a prime target for companies marketing green, socially responsible and healthy products, they present a market for promoting 'UGGp product' by way of sustainable tourism, as well as an audience for core messaging to promote the values and ethos of the UGGp community.

[Section 6.1 Page 20]

1.15 Global tourism growth continues to outperform the global economy as a whole and is projected to grow by an average 3.8% pa to 2028. Arrivals in emerging destinations are expected to grow at twice the rate of those for advanced economies to 2030, presenting opportunities as well as challenges to UGGps in these regions. Tourism supports 1 in 10 jobs globally and is projected to contribute 25% of global net job creation over the next decade. The opportunity for UGGps to benefit from this growth through sustainable tourism is significant.

[Section 7.1 Page 21]

2.0 Our conclusions and recommendations

2.1 Core Values and Narrative: The conservation and celebration of Earth's Heritage alongside sustainable development of local communities lie at the heart of the UGGp Network. The local partnerships and engagement the UGGps have with their stakeholders provides an opportunity to seek wider input to the brand development process while offering UGGps the opportunity to further strengthen their engagement with these stakeholders by way of their involvement with the project.

RECOMMENDATION: Phase 2 of the project should further engage with the UGGp communities and the very stakeholders their work seeks to support. We propose a series of workshops to be run by UGGPs that wish to participate in order to further develop the elevator pitch, tagline, and identify key interventions to inform the action plan. This is further explained in section 3.

2.2 Messaging: Many members of the UGGp network expressed their perception of a confusion of messages, logos and websites that could dilute communication of the 'grand narrative' that will result from the brand development exercise to the wider public, and cause confusion amongst consumers and potential commercial partners.

RECOMMENDATION: Once the brand values and narrative are agreed, global communications delivered by the action plan to external audiences should use one visual identity and one clear message to ensure consistency and clarity. Consideration should be given to if and how regional logos are used. We recommend the GGN logo be used only for internal and key stakeholder communications. Unless there is a will to create a completely separate 'tourism logo', the SINGLE logo for all public facing communications should be;



2.3 Target Market: The majority of UGGps want to attract more 'quality' visitors, who stay longer and spend more into their local communities, rather than a focus on volume of visitors and the associated potential for over-tourism. The emerging UGGp brand is likely to resonate well with environmentally conscious consumers who relate to the conservation work and local cultures of the UGGps. One example of this target market is the LOHAS consumer segment of over 100 million influencers / early adopters globally. This approach meets the requirement of the UGGp network to grow higher value, longer stay 'boutique' tourism in order to maximise economic benefits to local communities, avoid over-tourism, with a balance between domestic and international visitor growth.

RECOMMENDATION: The Action Plan should focus on curating and creating content and developing channels to engage with environmentally aware consumers promoting 'soft education' messaging as well as animating the global tourism offer of the network, in order to encourage sustainable tourism and travel.

2.4 Accreditation: None of the major sustainable tourism accreditation schemes we have identified fully reflect the objectives of the SDGs in their membership criteria. A credible accreditation scheme would reinforce the unique qualities of UGGps as Sustainable Destinations, supporting both tourism development and education objectives with the LOHAS segment, while potentially also providing a source of income to individual UGGps and to GGN.

RECOMMENDATION: The Action Plan should consider development and scoping of an international Sustainable Tourism Accreditation Scheme, for tourism businesses (and others) within the UGGps. The scoping should assess the viability of GGN centrally operating such a scheme and identify resources required.

2.5 Tactical communications: The consultation exercise highlighted that UGGps see potential for this project to provide additional support by helping to ‘professionalise’ their own marketing and communications activity, as this is often not an area of their core expertise. In addition, they saw opportunities for centrally coordinated ‘campaigns’ that they could choose to engage with.

RECOMMENDATION: The action plan should identify a number of specific toolkits and other online resources to build on best practice and help individual UGGps to improve their own communications. The plan should also identify a realistic programme of centrally coordinated projects that collectively animate the local offer of individual UGGps. This can be explored in Phase 2.

2.6 Internal communications and resources: Early into the project we identified that there doesn’t appear to be a central repository of resources such as images, documents, best practice case studies, where these resources are available in one place for UGGps to access and share with partners/stakeholders. A consequence of this can be a heavy workload of emails between UGGps for individual projects.

RECOMMENDATION: An early deliverable from the action plan should be to roll out access to the online workspace created as a management tool for this project, to all UGGps, assembling content and enabling document management. This system can also be used as a ‘communications hub’ where regional partners can hold discussions online, as well as for specific projects.

2.7 Local Communities: A strong common thread from the consultation exercise was the importance of sustaining and engaging with local communities in the UGGps. Our own conclusions identify that how the planet has shaped the lives of communities in the UGGps, past and present, as a critical foundation to communicating with the wider public, over and above the mosaic of Earth Heritage represented by the physical geology of the UGGps.

RECOMMENDATION: Local communities should be a strong thematic of projects identified in the action plan. These projects should be designed to engage with communities from the outset in order to better tell their stories, in a way that will capture the imagination of the wider public as well as reinforcing pride on those local UGGp communities.

2.8 Product development: The geopolitical climate change and environmental agenda is driving changes in consumer behaviour towards low impact products and services, as well as more sustainable/responsible travel. This is particularly evidenced by the purchasing behaviour of the LOHAS consumer segment:

RECOMMENDATION: The action plan should include creating resources and best practice toolkits to support individual UGGps to develop and promote local products effectively to a global audience, benefiting local communities and reinforcing the brand commitment to sustainable tourism and lifestyles.

2.9 Business Tourism: UGGps with substantial meeting and conference facilities would benefit from support in promoting to the conference and events market. In particular, international association delegates, often from professional bodies, tend to be longer stay and higher spending visitors, aligning with the UGGp sustainable tourism development objectives.

RECOMMENDATION: The action plan should identify an audit of major conference destinations within the UGGp network and how this offer can be collectively promoted to an international association, but also to a corporate audience. The opportunity exists to target events with subject matter closely aligned to the UGGp values.

2.10 Marketing audit: Phase 1 has focussed on research and has not considered in any detail the existing marketing activities or partnerships driven centrally by GGN, including those that might be public or travel trade facing.

RECOMMENDATION: The Action Plan should identify the need in the delivery phase for an early audit of existing promotional activity carried out centrally and regionally, to better assess where value can be added and resources best deployed.

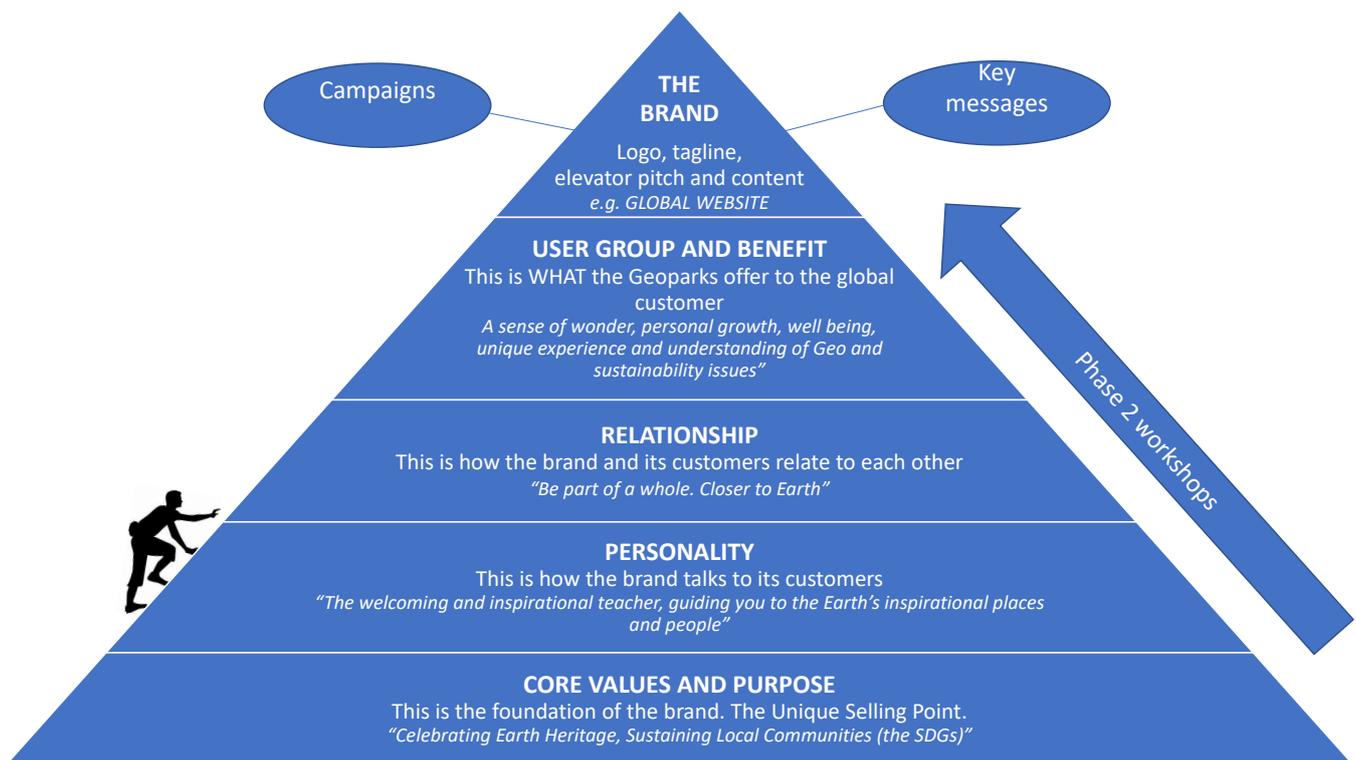
3.0 Proposed Next Steps for Phase 2, Brand Identity Development, global and local.

November to end December 2019.

As our activity developed, the sense of (what we are calling for now) 'The Grand Narrative' emerges. The grand, wonderful, powerful story of our Earth, its role in the journey of humanity and its contemporaneous effect on visitors and local culture and economy. How each UGGp is unique, but is part of the 'mosaic of the Earth's story'. How their offer extends beyond the landscape, to a deeper experience for visitors. All we spoke to felt strongly about sharing this story better with visitors and residents. At the same time, there is a need to satisfy the 'fun' visitor, who may not want to submerge themselves in educational activity and may just wish to have a nice time. Light touch messaging is also important. There is clearly a need to 'humanise' and animate the geology.

UGGps represent collaborative expertise. The network is the repository of global scientific knowledge relating to geohazards and geology. This fact gives the UGGp community integrity, or perhaps (benign) authority, in terms of underpinning the brand message.

There is a great opportunity here to create a public facing 'Grand Narrative' to define the UGGp brand that directly connects the global with the local, the landscape to the experience, using the monumental nature of the network's geo-offer and knowledge to drive business to the inhabitant communities of the UGGps. A consistent brand message that articulates the essence of what a UGGp is, and crucially what that *means* for the visitor, in terms of their experience is key not only for the public but stakeholders, governments and residents. Many consultees referred to the need for an 'elevator pitch' which will be a focus of stage 2.



The italic working in the above diagram is work in progress, based on a first thinking and assessment of the input from Geopark colleagues in phase 1, and demonstrates the journey towards creating the public facing brand, built on a foundation of core values, purpose and brand characteristics of the UGGp network. The next stage of the process will further develop these messages, taking us to a point where we can refine the brand characteristics to inform outward facing communications and campaign activity in the final action plan.

3.1 Proposed Phase 2 Workshops

We would like to propose that during November we pilot with two UGGps, refine, and then work with another four UGGps and their resident communities to undertake a further exploration around the brand identity using the Kapfer model and construct outlined here. Participating Geoparks will be provided with a summary of our findings from Phase 1. We will further refine;

SUBSTANCE: The observable face – the aspects of it that spring to mind most readily when you think of Global Geoparks. (The logo and purpose: online content)

PERSONALITY: of the UGGps, HOW do we talk to a potential visitor, what is our TONE?

VALUES: What are the values that ALL UGGps embrace?

RELATIONSHIP: With our visitors, what does that relationship look like?

USER GROUP: Identifying our visitors.

USER BENEFIT: The reason(s) why visitors will and should come. The perceived benefits.

We feel there should be at least one UGGp from each continent in this small group. In determining the values and voice the UGGps share, it is imperative that for a global brand, there is global input at this stage to ensure any cultural differences or nuances in meaning are addressed. Selected Geoparks must confirm they have the capacity to take part.

Our team can either facilitate by Skype, phone or if travel is possible, in person. We would however aim to make the Workshop not only as clear as possible, but simple to deliver and feedback, by condensing the consultation into usable collateral (interviews and letters). The workshops should be four stages;

1. Defining the elevator pitch for visitors, stakeholders and residents.
2. Creating a public facing tagline or purpose statement.
3. A real task of inviting a visitor.
4. Scoring support Interventions

3.2 Proposed Workshop Outline

We will supply a short briefing for all participants featuring the key findings from this report. 6 or so people is a good number. Each group should ideally consist of Geopark staff, at least three of exactly the kinds of communities / businesses that Geopark wishes to support and an external partner.

1. **Elevator pitch:** We will provide two / three variations on the elevator pitch, or rather purpose/mission of the emergent brand, based on this research and applied to the Kapfer model. Each workshop is invited to pick one they prefer or create one of their own.
2. **Public facing tagline:** We will ask the group to create a tagline in 12 words or less.
3. **Invite a visitor:** Complete either a short (1 minute maximum) video or a letter – or both – to a typical LOHAS customer.

Sofia is a LOHAS customer. She cares deeply about the planet and sustainability so wants to stay in as environmentally friendly accommodation as possible and enjoy at least two cultural experiences during her stay. She is with her two friends. They are in their mid 30s. Sofia loves photography.

Dear Sofia, I would like to invite you to 'Example UGGP and location'.

- Where do you suggest she stays?
- What two geological features (landscapes) should she make sure she sees? Is there a best time of day ? Try not to use scientific terms. Why these two?
- What two cultural experiences should she have?
- Can you tell her about your regional produce? Remember she is from another country and may not even know what the words you are using mean

4. Scoring interventions

How helpful 1-10 (could be online) or select top five:

- Global public facing website (and great content) communicating the key messages about the UGGps, the story of earth and how the UGGps fit this and guidance to what to expect from a UGGp.
- Templates for communications material
- Toolkits for promoting local produce and crafts
- Continental ambassadors for the UGGp network (attractive to the public)
- A 'library' of information to help you promote the message in your Territory
- Online or conference workshops on how to maximise the UNESCO and UGGp brand
- Support / advice for gathering economic data
- Best practice case studies for marketing and engagement
- A single concerted activity for all the Geoparks on World Earth Day 2019 (i.e. create the UGGp logo in natural materials – as large as you can!)
- Access to an online workspace dedicated to communications
- An internationally accredited quality mark for sustainable businesses and guides in your UGGp.
- Awards specifically for marketing and communications - celebrating best practice
- How relevant might this approach be for Geoparks? <https://visitworldheritage.com/en/eu>

There is a desire amongst the UGGps to not only support this initiative but to be fully engaged in next steps. It is clear they need, and would welcome, communications and organisational support to yes, attract the right kind of tourist, but also to support engagement with crucial territorial stakeholders and residents. We hope our proposed next steps for Brand ID workshops respect these aspirations.

We also hope that by delivering phase 2 as we propose (a 'reality' task-led approach), which can then be shared by way of example alongside the later summary report, we can help the UGGps (who have very differing offers and local communication requirements) focus on the global brand. We suggest we build the brand bottom up, and as the heart, feel tone and delivery of the message unfolds, continental and regional needs can be better finessed and met.

There is a second strand of phase 2 activity which is analysis of potential partner / sponsor brands. In order for this to have meaning, an exploratory conversation with UNESCO is required. The Network should also consider a suite of media partnerships to assist in delivery of the tactical plan.

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