

Bloom Consulting
Country
Brand
Ranking©

2014
2015



Tourism
Edition

Hello!

Bloom Consulting Country Brand Ranking©

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Bloom Consulting

About the company

Bloom Consulting is an 11 year-old Country Branding consultancy.
Our Headquarters are located in Madrid with offices in Lisbon and São Paulo.

Bloom Consulting has been interviewed by **The Economist**, **Forbes** and **CNN** .
According to Country Branding Central www.countrybrandingwiki.org, our CEO José Filipe Torres is considered one of the top 3 international experts in the field of Country Branding, Region and City Branding, providing advisory for the **OECD**.

In addition, Bloom Consulting publishes the Bloom Consulting Country Brand Ranking © annually for both Trade and Tourism, to analyze the state of the art of the brand performance of 225 countries and territories worldwide.

Bloom Consulting proudly collaborates with the  to measure the Nation Brand appeal of every Country from a tourism perspective.

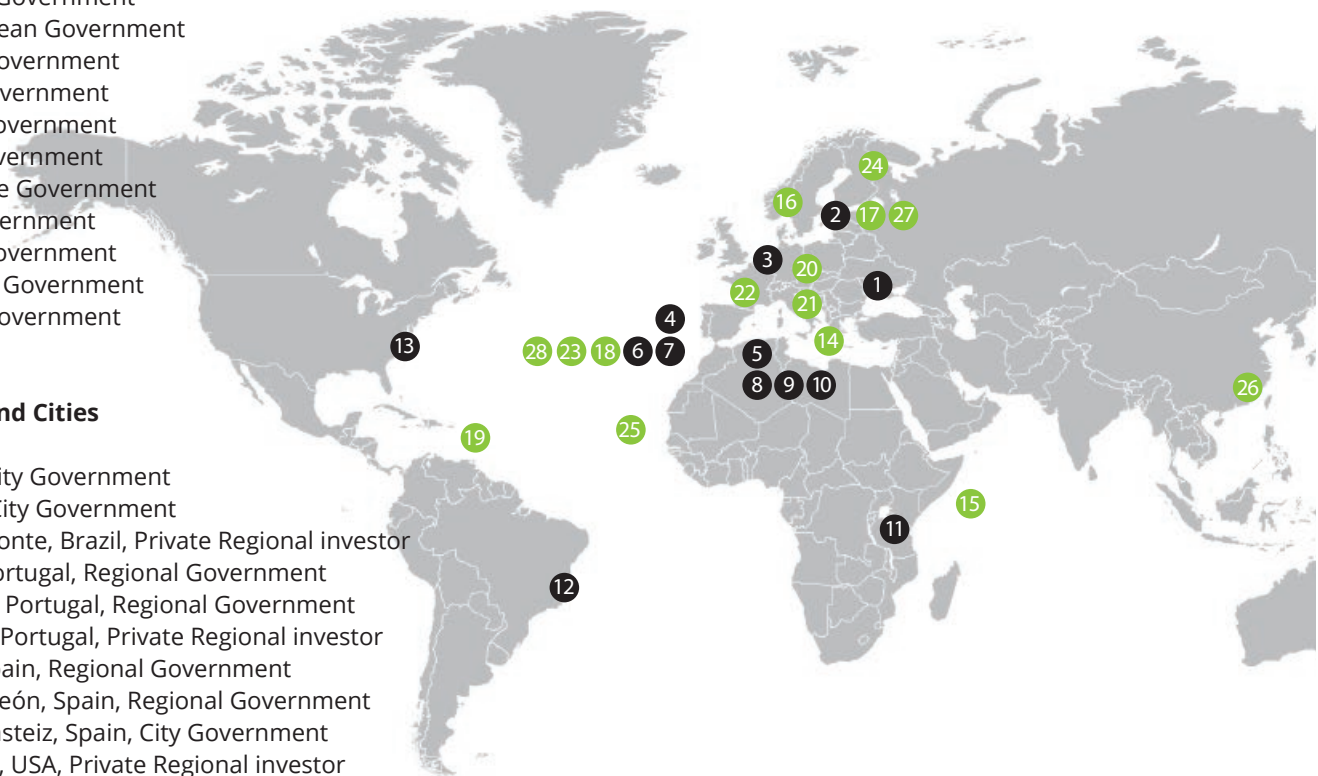
Here are some of the countries, regions and cities that Bloom Consulting has worked for:

Countries

Austrian Government
Aruban Government
Bulgarian Government
Cape Verdean Government
German Government
Latvian Government
Maltese Government
Macau Government
Portuguese Government
Polish Government
Spanish Government
Seychelles Government
Swedish Government

Regions and Cities

Helsinki, City Government
Brussels, City Government
Belo Horizonte, Brazil, Private Regional investor
Algarve, Portugal, Regional Government
Southwest Portugal, Regional Government
Southeast Portugal, Private Regional investor
Madrid, Spain, Regional Government
Castilla y León, Spain, Regional Government
Victoria Gasteiz, Spain, City Government
Miami City, USA, Private Regional investor
Tete, Mozambique, Private Regional investor
Oporto and North, Portugal, Regional Government
Riga, Latvia, City Government



A letter from our CEO

We did it!

Madrid, December 2014

I proudly present you with the fourth edition of the Bloom Consulting Country Brand Ranking © 2014 / 2015 Tourism Edition! It is my firm belief that this is our most thorough and comprehensive tourism ranking yet. After years of dedicated efforts, it is my professional opinion that our experts at Bloom Consulting have finally crafted the perfect algorithm and methodology to measure the effectiveness of a country's tourism brand worldwide.

Knowing that as a consulting firm specialized in nation branding and destination branding we must always be at the forefront of major changes in the industry, Bloom Consulting has been attuned to the increasing prominence of countries in the Digital World.

As a result, we know that the success of a Country, Region or City Brand relies more than ever on its online presence; if a brand is unable to capture the interest of the digital demographic by targeting users of new online distribution channels and markets, its tourism industry is likely to falter. We at Bloom Consulting have invested a lot of research in this topic of the "Digital Country;" as a nation must have a full-bodied form of online representation, or else risk lower global prominence.

To put this in perspective, tourists made over 328.680.000 online searches related to touristic activities and attractions in 2013 alone, according to our proprietary tool called Digital Demand - D2 ©. Imagine the insight a country, region or city could gain from this data, both about the appeal of a specific destination and its positioning within a global benchmark.

Taking the significance of this number into account, Bloom Consulting's Country Brand Ranking © 2014 / 2015 Tourism Edition, now factors the results of our Digital Demand - D2 © at a greater weight than ever. We originally developed the D2 © tool as a means of analyzing the appeal of potential tourists (see page 7 for more details). Lately, the relevance of this variable has heightened immensely in relation to the cultivation of the "Digital Country." To parallel this Digital Demand - D2 © measurement, we have also placed more focus on a Country Brand's social media presence this year. Notably, in addition to Facebook and Twitter, we have included the evaluation of two new social media platforms, Instagram and Google Plus.

I hope that Bloom Consulting's Country Brand Ranking © 2014 / 2015 Tourism Edition provides you with valuable information; I encourage you to use it as evidence of the impact a strong Country Brand can have on the economic performance of a national tourism industry. I hope you appreciate the results as much as we did!

While we would like to utilize our Country Brand ranking to elaborate on each individual country's performance, it is impossible to do so. However, if you'd would like to find out more about a specific Country Brand's performance within the ranking, please do not hesitate to contact us.

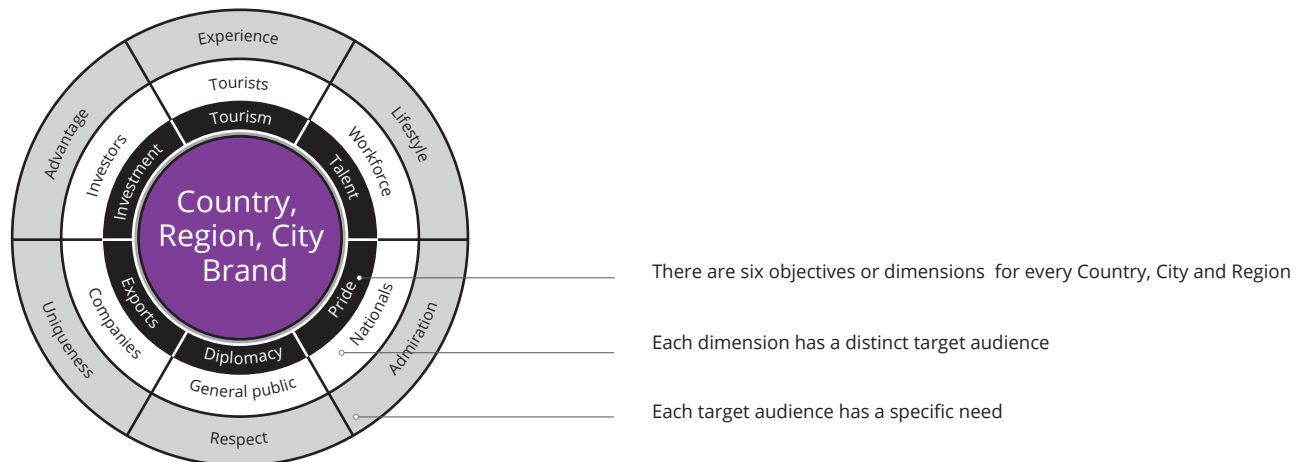


José Filipe Torres
CEO, Bloom Consulting

PD - Dont miss Country Brand ranking **trade** edition midyear 2015!

Bloom Consulting's Branding Wheel

Our model: a different approach



A Country, Region or City Brand is an asset that must be managed by a distinct and varied set of methodologies in order to achieve its desired objectives. Bloom Consulting defines six different Country, Region and City (CRC) Branding objectives or dimensions as depicted above in Bloom Consulting's Branding Wheel.

1. Attraction of Investment (Trade)
2. Attraction of Tourism
3. Attraction of Talent
4. Strengthening National Pride (Increase of National Pride)
5. Strengthening Public Diplomacy (Increase of Public Diplomacy efforts)
6. Strengthening Exports (Increase of Exports)

Each of these six objectives and dimensions has a specific target audience with distinct needs. The target audience of tourism, for example, is tourists, who overwhelmingly seek an unparalleled vacation experience when visiting a branded country, region or city. Bloom Consulting's methodology, therefore, focuses on isolating each objective or dimension so as to develop unique and tailored strategies for all six sectors.

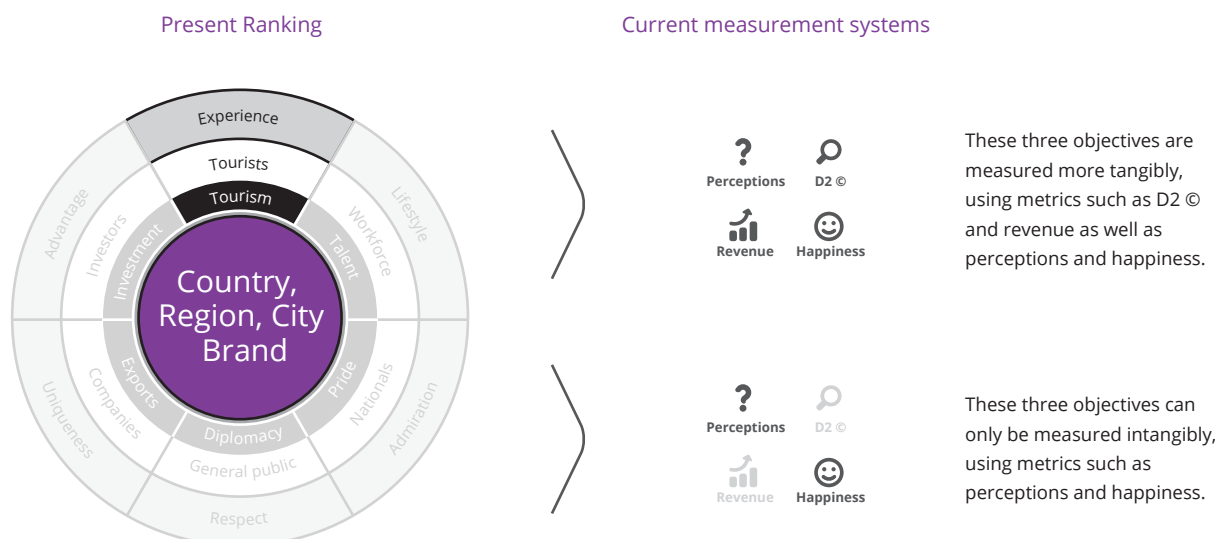
So why must the objectives and dimensions be isolated if together they comprise the same brand?

Our reasoning behind this is that a single, narrower strategy cannot possibly satisfy the needs of a such a diverse range of brand target audiences and markets. Any attempt at an all-encompassing Country, Region or City Branding strategy does not address sufficiently varied content and prerequisites in a manner that adequately improves the salience of the respective brand. Subsequently, any country, region or city seeking a professional branding technique should develop tailored strategies for the needs of each target market.

It is important to remember that the brand is not the logo; a Country, Region or City Brand can have the same logo for all six dimensions, or no logo at all.

Bloom Consulting's Branding Wheel

Our model: a different approach



Another key facet of Bloom Consulting's approach to Country, Region and City Branding is our trademarked performance measurement system. Bloom Consulting has developed a set of performance indicators that measure the impact of a branding strategy within each of the six objectives and dimensions. Branding methodologies have traditionally relied on soft data such as public perception, surveys and interviews. Our technique, on the other hand, uses proprietary methods such as our Digital Demand - D2 © tool, measuring the online demand for a specific country by target audience, as well as indicators of economic impact.

For this report – the Country Brand ranking Tourism Edition – online demand for tourism in a specific destination, as well as tourism revenues, are measured. This data can both assess the current economic impact of tourism within a country, as well as predict its future success in the industry.

Not all of the six dimensions of the Branding Wheel can be measured in the same way. As highlighted in the figure above, three are measured tangibly (Investment, Tourism and Trade), while the remaining three sectors (Exports, Diplomacy and Pride) can only be estimated by intangible methods.

While we recognize the importance of the less tangible sectors, Bloom Consulting focuses on making a Country, Region or City Branding strategy as tangible as possible. For this reason, we overwhelmingly focus our firm's efforts on analyzing the three most tangible dimensions, which we refer to as the 3T Approach ©:

1 – Trade (Investment), 2 – Tourism, 3 – Talent

Accordingly, for each of these three sectors, a unique Country Brand ranking is appropriate. However, for the time being, Bloom Consulting has only developed rankings for Trade (Investment) and Tourism. This ranking only concerns Tourism.

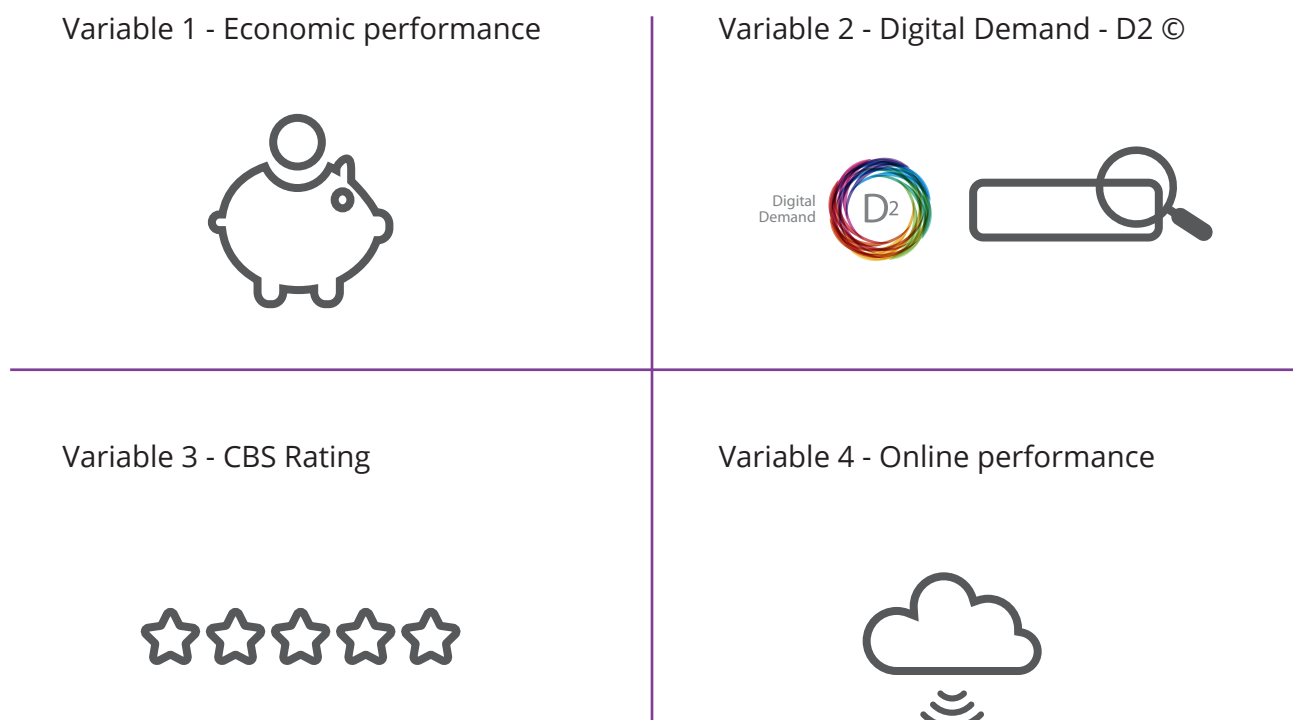
Our methodology

The logic behind our Country Brand ranking

Bloom Consulting derives its annual Country Brand ranking from our proprietary algorithm using only tourism-related variables. The final results of our ranking not only measure perceptions of a tourism specific Country Brand, but also classify its relative branding performance in a tangible and realistic manner.

Our algorithm, accordingly, comprises four key variables used to analyze the success of 180 unique Country Brands, as well as their relative performance as compared to one another. The algorithm accounts for both the economic prowess of a country's tourism sector and its online performance, thus considering hard and soft data in an accurate and objective Brand Ranking.

This methodology is outlined in the figure below and detailed in the next pages.



Variable 1 + Variable 2 + Variable 3 + Variable 4 = **Country Brand ranking**

Our methodology

Variable 1 - Economic performance



Tourism receipts



Tourism receipts growth



The tangible economic success of a country

The economic performance of a country's tourism sector is a key variable in Bloom Consulting's Country Brand Ranking. Economic success, whether obtained intentionally by a tailored strategy or not, is the most important aspect in measuring an effective Country Brand; the brand of a country's tourism industry cannot be strong if the country does not achieve financial gain from international visitors. Tourists will travel to a country with a stronger appeal and greater attractiveness as a tourist destination, traits governed by the success of that country's brand.

This variable is based on the following data calculated from UNWTO international tourism statistics:

Tourism receipts

Average of total annual tourism receipts of international tourists within a country, 2008-2012.

Given the fact that Country Brand strategies often do not have immediate economic returns, Bloom Consulting calculates this figure as an average of a country's total annual tourism receipts from international tourists over a five-year period (2008-2012). This adjustment also accounts for possible yearly variations in receipt total due to political instability or acute economic crises.

Tourism receipt growth rate

Average accumulated growth of total annual tourism receipts of international tourists within a country from 2008-2012.

To account for a Country Brand's relative economic performance improvement in the tourism sector by year, Bloom Consulting computes the annual growth rate of tourism receipts from international tourists within each country as compiled through a five-year average.

Our methodology

Variable 2 - Digital Demand - D2 ©



- Culture
- Leisure
- Outdoors
- Niche Markets
- Target Markets

The total online demand for a country

According to the *Google Traveler* report, nearly 70% of leisure travelers utilized the Internet as a trusted source of information when choosing a destination for travel. The same study indicates that 64% of travelers use search engines specifically for this purpose. As a result, millions of travelers worldwide are so inspired by the results they see on search engines that they choose to travel to a destination based on its online image.

Rankings often measure the attractiveness of a Country Brand by market research, surveys and opinion studies. Bloom Consulting has a different measurement system as it uses a proprietary tool called Digital Demand - D2 ©.

The D2 © tool measures the total online search volume for tourism-related activities and attractions within each of the 180 countries included in the ranking, allowing us to assess the online behavior and decision-making processes of international tourists. The more online tourism-related searches a country has, the more appealing the brand is.

Given the undeniable importance of online presence in the success of a Country Brand, Bloom Consulting has analyzed online tourism-related search data across 40 brandtags, each comprising destination-specific keywords correlated to tourist activities and attractions. A total of 3.818.000 keywords were analyzed across nine languages: English, Spanish, French, Italian, German, Portuguese, Russian, Japanese and Chinese.

NOTE: The detailed D2 © information for every country is not presented in this document.

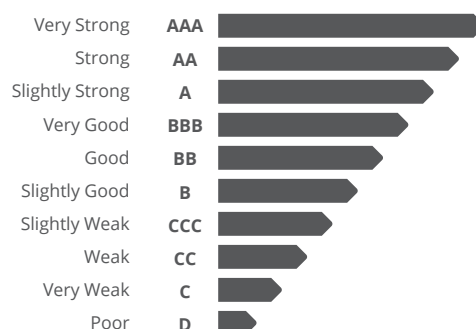
If you are interested in a full D2 © report for a specific country or group of countries (also available for regions or cities), please email us at d2@bloom-consulting.com or call us directly at +34-913-080-286 (CET).

Here is the list of topics covered by the Digital Demand - D2 © Tool:

Culture	Leisure	Outdoors	Niche Markets	Target Markets
1. Historical Sites	8. Beaches	17. Adventure and Extreme	26. Animal Watching	35. Business
2. Local Gastronomy	9. Boating	18. Diving	27. City Tourism	36. Couples
3. Local People	10. Entertainment Parks	19. Fishing	28. Cruises	37. Family
4. Local Traditions	11. Gambling	20. Golf	29. Language Courses	38. LGBT
5. Museums	12. Leisure Activities	21. Hiking	30. Luxury Tourism	39. Senior
6. Performing Arts	13. Nightlife	22. Hunting	31. Medical Tourism	40. Youth and Backpackers
7. UNESCO	14. Shopping	23. Surfing	32. Protected Areas	
	15. Spa	24. Water Sports	33. Religious Tourism	
	16. Special Events	25. Winter Sports	34. Sustainable and Rural Tourism	

Our methodology

Variable 3 - Country Brand Strategy - CBS Rating



The accuracy of a country's branding strategy for tourism

The third variable of Bloom Consulting's Country Brand Ranking © evaluates the accuracy of the strategy by each National Tourism Organization (NTO) for all 180 countries included in the ranking. We measure the NTO's branding accuracy by means of formulae that compare the most popular brandtags (as measured by our Digital Demand - D2 © tool) for a specific country to the brandtags most heavily promoted by that country's NTO.

A Country Brand receives a higher rating if that country's NTO focuses its strategic and promotional positioning on the tourism-related brandtags with the highest demand as measured by total online searches from international tourists. A poor rating can suggest either the inappropriate promotion of the least popular brandtags (as measured by online search volume) by an NTO or the lack of focus on the brandtags in highest demand.

Exceptions may apply in the case of a country that has recently begun a new Country Brand Strategy for tourism to highlight lesser-known brandtags in the hopes of finding new markets. In this case, a lower rating simply implies that the result of this new strategic positioning has yet to make its impact.

The final result of our analysis provides a snapshot of the demand for information about tourism in a specific country from an international market. We are further able to compare the Digital Demand - D2 © results for a country by brandtag to the estimated economic value by brandtag through a cross regional analysis. Naturally, a higher accuracy is more favorable, so as to maximize the economic performance of a nation. Together, all of these components factor into the final CBS Rating.

Our methodology

Variable 4 - Online performance



Instagram



Facebook



Twitter



Google Plus



Site



The total online presence of an NTO

Given the importance of digital strategic positioning in the success of a Country Brand, the final variable for our Country Brand ranking takes advantage of web analytics and social media data to analyze and evaluate the total online presence of a Country Brand. Seeing as a country's NTO functions as the gateway to its Country Brand, its online diffusion, both through its official website and presence on additional online platforms, contributes greatly to the brand's overall success.

In order to assess the performance of an NTO website, Bloom Consulting utilizes a website analytics tool to calculate the number of total visits to and average total time spent per visitor on the official webpage. Our algorithm rewards websites with a higher number of visitors and greater digital reach.

Our algorithm additionally accounts for the social media diffusion by evaluating its presence on Facebook, Twitter, Google Plus and Instagram. The more likes or followers that the official NTO account has on these platforms, the better its ranking will be. If an NTO is inactive or does not have an account, our algorithm penalizes its Country Brand ranking.

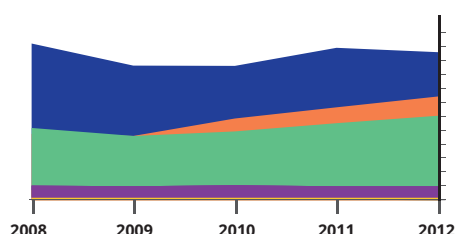
While social media activity and general online presence are important variables, they are given the least weight in our algorithm... for now.

World outlook

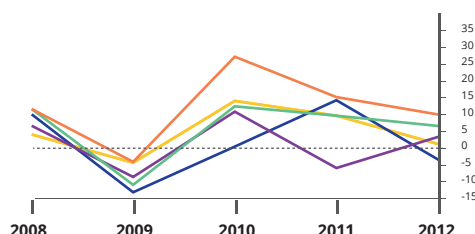
Facts and figures from the world ranking



Tourism receipts (Source UNWTO)

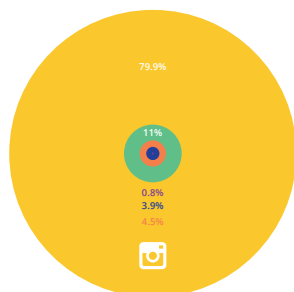
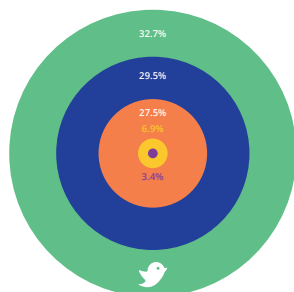
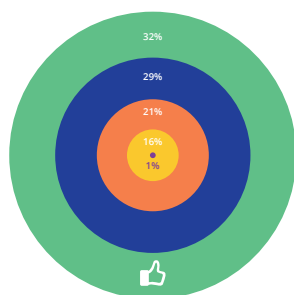


Tourism growth (Source UNWTO)



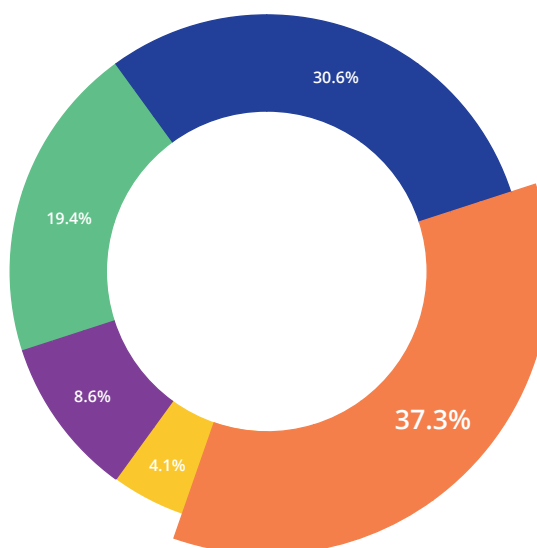
Economic performance

The 2008-2012 average places Europe as the continent with the largest revenue due to tourism. The continent with the highest growth rate is Asia.



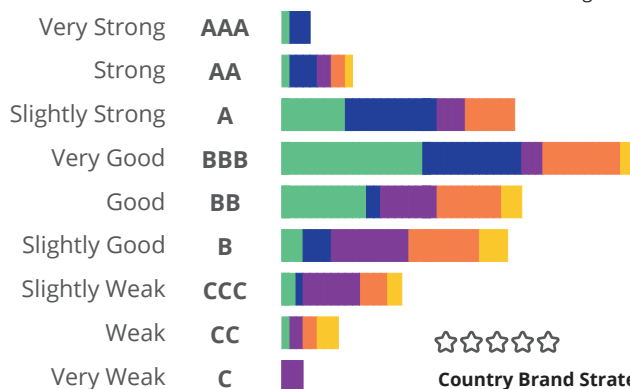
Online performance

Facebook is the platform with most users followed by Twitter and Instagram. Percentage wise it is interesting to see the clear leadership of Oceania.



Digital Demand - D2 ©

Asia is the most searched continent by international tourists worldwide, followed by Europe and Americas. Asia has a staggering growth, a fact that demonstrates a future growth trend for the region in terms of tourism.

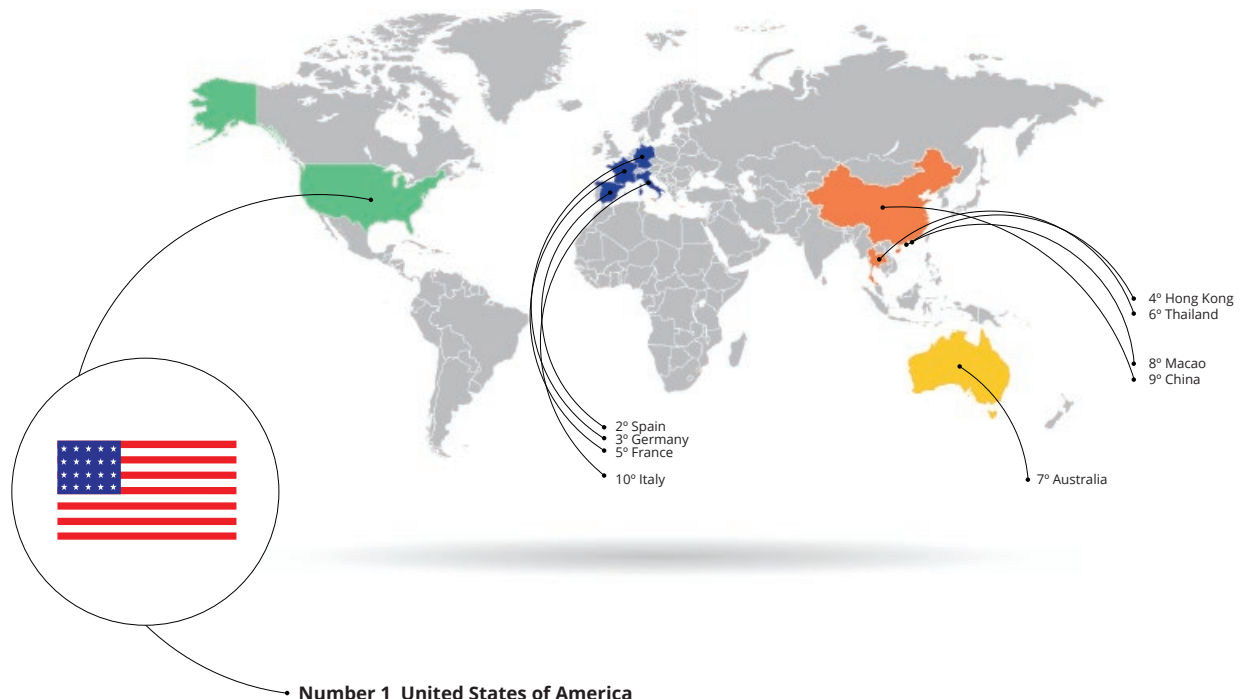


Country Brand Strategy Rating (CBS Rating)

The most common grade attributed to the promotional strategies implemented by the NTO's is a "BBB". Europe's NTO's win the top 3 grades "AAA" "AA" and "A" and Africa has the majority of the lower end of the scale grades.

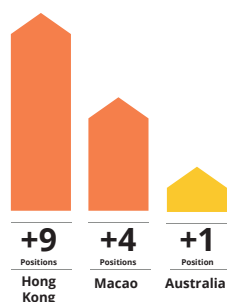
The top 10 overview

1 American, 4 European, 4 Asian and 1 Oceanian



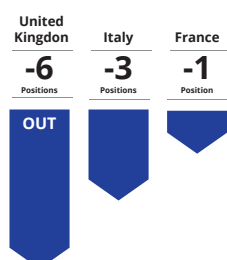
Number 1 United States of America

For the fourth consecutive year, the United States of America tops Bloom Consulting's Country Brand Ranking © 2014 / 2015 Tourism Edition. The country's dominance in total tourism receipts, along with the effectiveness of its NTO strategy (as measured by its very strong CBS Rating) and a high level of Digital Demand - D2 ©, have catapulted the United States of America to first place yet again.



Biggest improvements

Asia is the star continent in this Country Brand ranking edition. Hong Kong, thanks to particularly high Digital Demand - D2 ©, tourism revenue and economic growth coming mainly from the Chinese Market (considered as international visitors), has performed better than ever, climbing nine positions in the global ranking. The same effect impacts Macao thanks to the increased Digital Demand - D2 © from the Chinese market and impressive touristic growth. Australia gained one position only, but this is rather important since it is more difficult to gain a position within the global top 10.



Biggest drops

Europe has the biggest drop with the UK having fallen out of the global top 10 ranking, in part due to the significant improvement in performance of its regional tourism competitors. Italy and France, two giant powerhouses are the big surprises in terms of ranking position losses.

Global top 25 performers

Highlights




























This year's Country Brand ranking welcomes two new countries to the global top 25: South Africa, moving up four places from last year to rank 24th; and India, improving three positions to 23rd place. These newcomers have, inversely, knocked two formerly top-ranked countries from last year's Country Brand ranking out of the global top 25: Egypt and the United Arab Emirates.

Within the global top 25 there have been many changes from last year's ranking. Outside of the top 10 (detailed in the previous section of this ranking), the United Kingdom (UK) is the best-performing country, edging out Austria for the eleventh position. On the other hand, Japan experienced a significant positive change (a ten-position overall improvement) in its Country Brand strength this year, mainly due to strong tourism receipts and increased Digital Demand - D2 ©. This trend was not echoed in all Asian markets; while Singapore and India saw some improvement, Malaysia, a former top performer, lost ground, the direct consequence of an underwhelming tourism receipt growth.

European countries fared well overall; outside of the top 10, the continent claims seven of the top 25 positions, often thanks to strong CBS Ratings ©. Nevertheless, only Portugal improved on its position from last year's ranking, while on the other end of the spectrum, Greece, in the throes of an economic crisis, plummeted nine positions. Surprisingly, despite its tenth rank in tourism receipts worldwide, Turkey fell out of its top 10 placement last year to just sixteenth overall, due to a comparatively dismal online performance.

The global top 25 performers rank

#	Variation		CBS Rating
1.	-	 United States of America	AAA
2.	-	 Spain	AA
3.	-	 Germany	AAA
4.	+9	 Hong Kong SAR, China	BBB
5.	-1	 France	A
6.	-	 Thailand	A
7.	+1	 Australia	BBB
8.	+4	 Macao SAR, China	AA
9.	+1	 China	BBB
10.	-3	 Italy	BBB
11.	-6	 United Kingdom	A
12.	-1	 Austria	AA
13.	+4	 Singapore	A
14.	+10	 Japan	A
15.	-1	 Switzerland	A
16.	-7	 Turkey	A
17.	+3	 Canada	BBB
18.	-	 Korea, Rep.	A
19.	-4	 Malaysia	BBB
20.	-1	 Mexico	AA
21.	-	 Netherlands	A
22.	+1	 Portugal	A
23.	+3	 India	BBB
24.	+4	 South Africa	AA
25.	-9	 Greece	A

The full ranking

Continent by continent

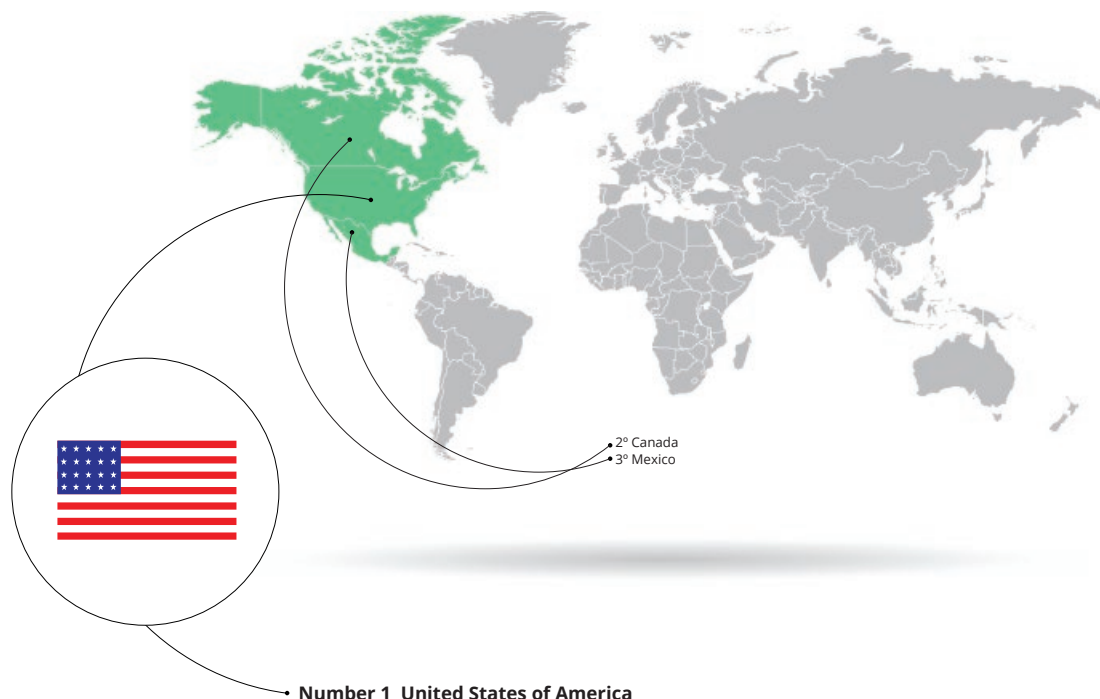


The Americas

United States, the undisputed leader



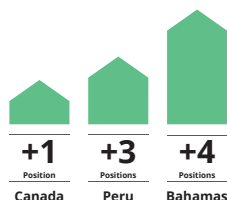
America Europe Africa Asia Oceania



Number 1 United States of America

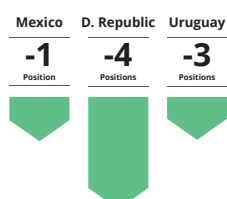
The United States of America remains number one in both the region and the world, challenged distantly by its ever-growing neighbors, Canada and Mexico, ranking second and third respectively within the Americas. Its incredible economic performance in terms of tourism receipts, almost 10 times larger than its main competitor Canada, makes the USA the absolute leader in the region despite its poorer online performance, especially in social media.

Biggest improvements



Canada has managed to climb up to the 2nd position in the region overtaking Mexico thanks mainly to its high receipts and growth, as well as a better social media performance than its peers. Peru has improved its position in the ranking thanks to its economic growth and social media awareness. Finally, the Bahamas has experienced the highest improvement in the region jumping 4 positions, thanks to its great Digital Demand - D2 © and CBS Rating performance.

Biggest drops



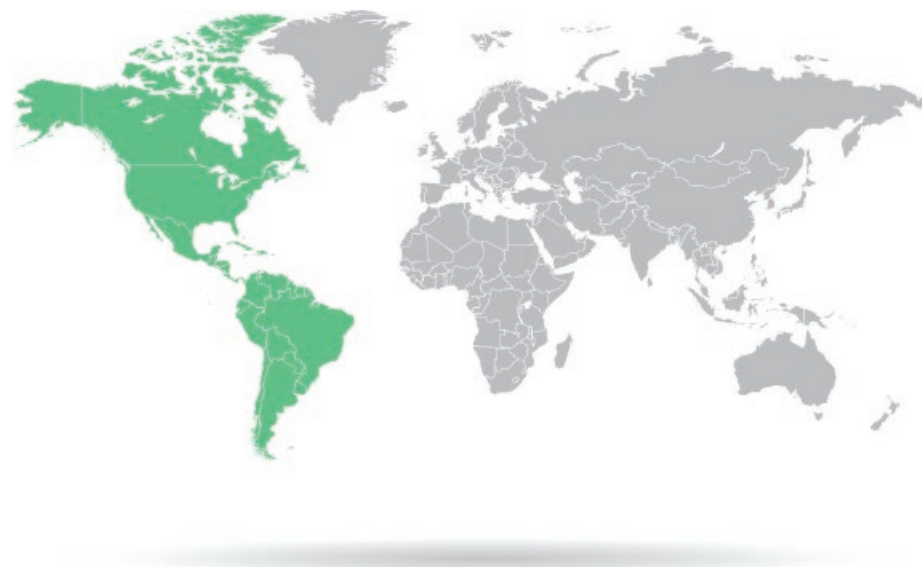
Despite a very good Digital Demand - D2 © and social media performance in the ranking, Mexico has been relegated to the 3rd position in the Americas due to its drop in tourism receipts since 2008. The Dominican Republic shows the biggest drop due to a relative worse performance mainly in Digital Demand - D2 © and tourism receipt growth. Uruguay, despite having experienced good economic touristic growth, shows a lower performance in Digital Demand - D2 © compared to its main competitors due to the high reliance on its neighbor market, Argentina.

The Americas

Highlights



America Europe Africa Asia Oceania




























The United States of America remains number one in both the region and the world, challenged distantly by its ever-growing neighbors, Canada and Mexico, who both managed good CBS Ratings © and online presence. Mexico, however, has lost its former second place regional position to Canada, a country that has just slightly outperformed the Latin American nation for the first time. Despite this slight decline for Mexico, the online presence of both countries is an undoubtedly helpful contribution to their performance. A more focused strategy could improve their future CBS Ratings © and potentially allow them to outperform the United States in the long run.





















Rounding out the regional top five are Argentina and Brazil, taking fourth and fifth place respectively. These South American giants have continually improved their tourism Country Brand performance, both noting higher than ever Digital Demand - D2 © and economic impact from tourism. Nevertheless, they are still almost twenty positions away from Mexico in the global ranking, their closest regional competitor. Further cultivation of their online presence should result in even greater results in the future.

Outside of the top five, two of the most notable jumps in position were recorded by Chile and Peru. Chile has improved to sixth in the regional ranking, surpassing Puerto Rico, while Peru ranks ninth, edging out the Dominican Republic and Costa Rica, marking the first time that the South American nation has reached the regional top ten. Each country has climbed at least eight rankings globally since last year's edition. Chile and Peru's ever increasing popularity with tourists seeking adventure, resulting in relatively high tourism receipts, should catapult them even higher up the ranking in the near future. Given the all-around success of the top tourist destinations in the Americas, it is likely that even more countries will constitute the global top 50 in upcoming years.

The Americas Rank

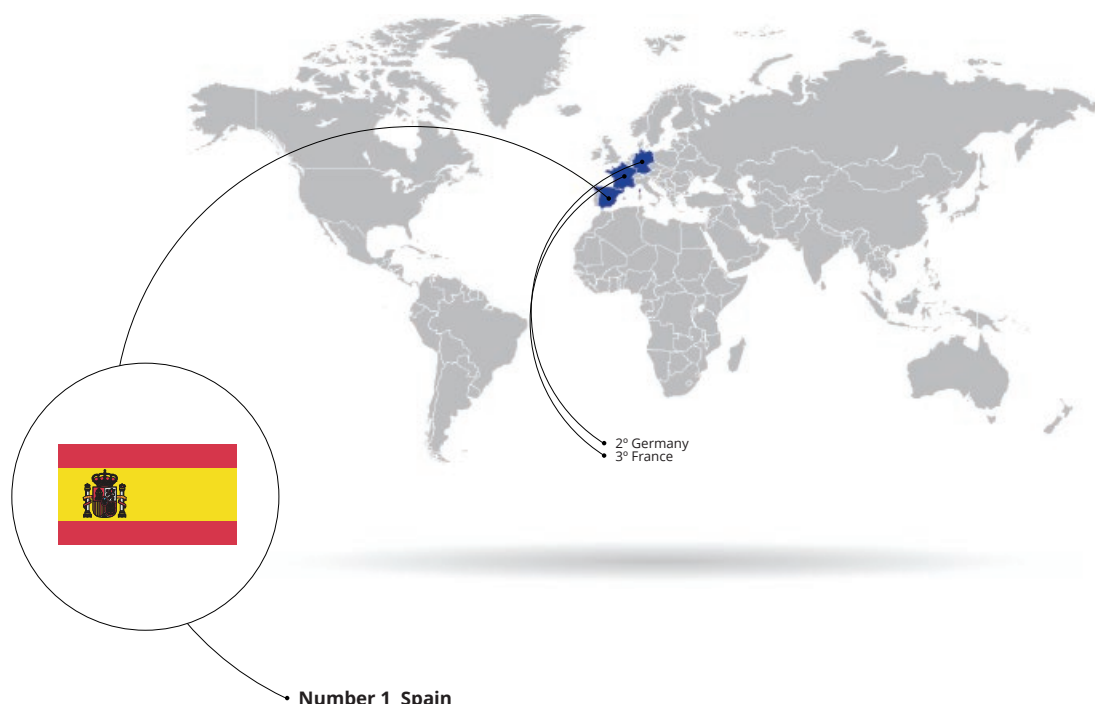
#	Variation		World Rank	CBS Rating
1.	-	 United States of America	1.	AAA
2.	+1	 Canada	17.	BBB
3.	-1	 Mexico	20.	AA
4.	-	 Argentina	39.	A
5.	-	 Brazil	40.	BBB
6.	+2	 Chile	44.	A
7.	-	 Puerto Rico	45.	A
8.	+1	 Panama	47.	BBB
9.	+3	 Peru	52.	BBB
10.	-4	 Dominican Republic	54.	BBB
11.	-	 Costa Rica	58.	BBB
12.	+4	 Bahamas	59.	BBB
13.	-3	 Uruguay	61.	A
14.	-	 Aruba	65.	A
15.	-2	 Colombia	68.	BB
16.	+1	 Jamaica	71.	BB
17.	-2	 Guatemala	73.	BBB
18.	-	 Cuba	77.	B
19.	-	 Ecuador	79.	A
20.	-	 Barbados	83.	BBB
21.	+1	 Curaçao	87.	A
22.	+9	 Paraguay	90.	BBB
23.	+1	 El Salvador	93.	BBB
24.	-3	 Venezuela	98.	BBB
25.	-	 Sint Maarten (Dutch part)	100.	BBB

The Americas Rank

#	Variation			World Rank	CBS Rating
26.	-1		Bermuda	105.	BBB
27.	+3		Honduras	108.	BB
28.	-1		Martinique	110.	BBB
29.	-		Trinidad and Tobago	111.	BB
30.	-2		Belize	117.	BBB
31.	+4		Guadeloupe	120.	BB
32.	+1		Saint Lucia	122.	BBB
33.	+3		Bolivia	123.	B
34.	-8		Cayman Islands	124.	BB
35.	-		United States Virgin Islands	125.	BBB
36.	-2		Nicaragua	130.	CCC
37.	-5		Antigua and Barbuda	131.	BB
38.	-		Haiti	135.	BB
39.	-		British Virgin Islands	141.	BB
40.	-2		Anguilla	146.	A
41.	-4		Grenada	149.	BBB
42.	-3		Saint Kitts and Nevis	150.	A
43.	-1		Guyana	156.	BBB
44.	-3		Dominica	158.	B
45.	-5		Saint Vincent and the Grenadines	163.	BB
46.	-3		Suriname	170.	BB

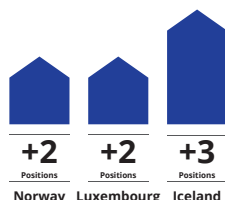
Europe

Same same, but different



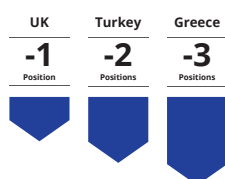
Once again, Spain takes the lead in the continent, excelling in Digital Demand - D2 ©, online performance and tourism receipts. Spain has managed to maintain its leadership position and cope with the general European drop in both arrivals and tourism receipts since the global crisis. Germany shortens the gap with Spain while France still needs to find a way to leverage its leadership in tourist arrivals.

Biggest improvements



Norway and Luxembourg improved 2 places each, the former due to an excellent CBS Rating and the latter due to an impressive online performance, ahead of some of Europe's top tourism destinations. Iceland registered the biggest improvement in this year's ranking due to two major areas: Digital Demand - D2 © and online Performance, boosting the country up three places.

Biggest drops



A low volume of Digital Demand - D2 © and a substantial decrease in tourism receipts dictated a three position drop by Greece, the most significant in the continent this year. Turkey lost two places due to its CBS Rating, social media and online Performance, while the United Kingdom went down one place due to the decrease of Digital Demand - D2 © in this year's ranking.

Europe

Highlights


























Europe, the traditional stronghold of powerful Country Brands, seems to be feeling the effects of new tourism powerhouses in the global arena. While four of the five top regional countries also help comprise the global top ten, and three – Spain, Germany and France respectively – maintain the overall ranks of second, third, and fifth worldwide, the continent as a whole seems to be suffering from a combination of economic crises and the rise of stronger competitors outside the region.

Nine of the regional top ten countries saw no movement or a decrease on their regional 2013 ranking, and the only two to improve – Italy, edging out the United Kingdom to take the fourth position in Europe, and Portugal, making the regional top ten for the first time – did so only marginally. Some traditional tourism powerhouses, such as the United Kingdom, Turkey and Greece, dropped multiple places in both the regional and global rankings. This is in part due to lower Digital Demand - D2 © and a lack of overall growth in tourism receipts; while the economic impact of tourism in the region is still high, the major setbacks caused by recent crises have failed to elevate revenue beyond the levels of faster-growing competitors. Outside of these top performers, however, it must be noted that some drops in rank are caused by the simple addition of Turkey and Cyprus to the European region; in last year's ranking, they were considered as part of Asia.

















Very few countries outside of the regional top ten seem to be showing promising signs for the future of their respective Country Brands, as a result of the same stagnancy afflicting countries like Greece and Turkey. Only six European countries had a higher global ranking than in 2013: Portugal, Belgium, Ireland, Norway, Luxembourg and Iceland; along with these nations, only Italy and Malta showed regional improvement. Among this group of better-performing countries in terms of Country Brand growth, only Portugal has accessed the regional top ten, while the others have achieved marginal improvements compared to their European competitors. The most impressive regional jump was recorded by Iceland, moving up three positions but remaining in the lowest performing group of the continent.

Nevertheless, with improved online branding strategies, including greater presence on social media and a stronger CBS Rating, the few bright spots on the European continent could eventually penetrate both the regional top ten and the global top 25.

Europe Rank

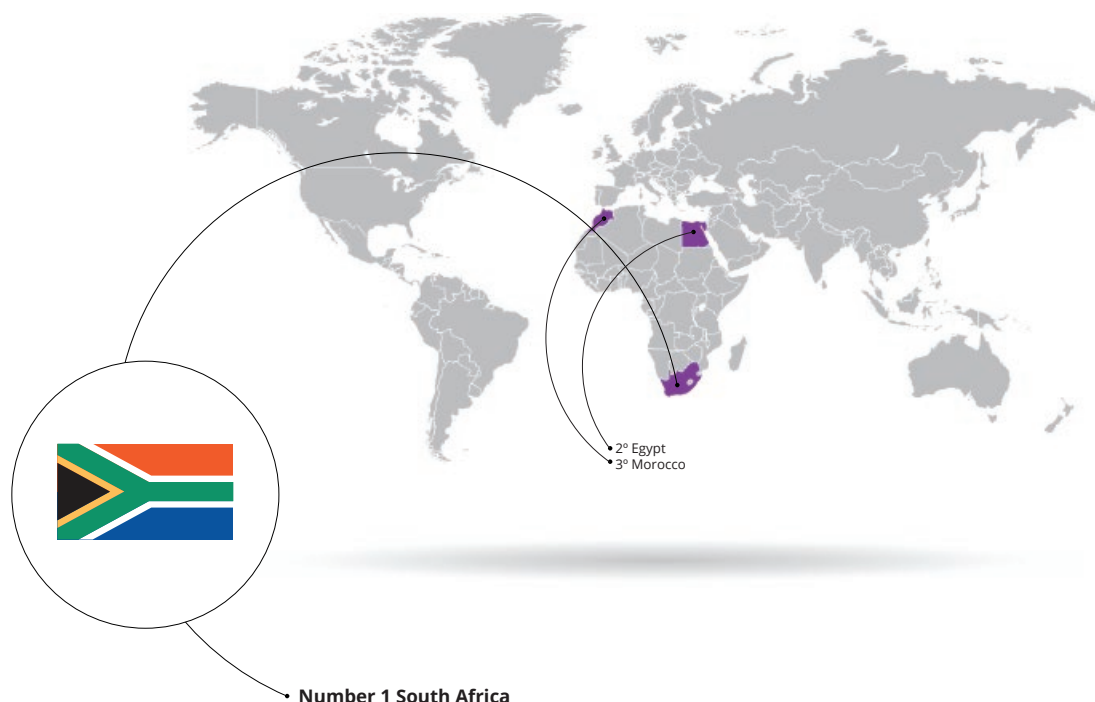
#	Variation			World Rank	CBS Rating
1.	-		Spain	2.	AA
2.	-		Germany	3.	AAA
3.	-		France	5.	A
4.	+1		Italy	10.	BBB
5.	-1		United Kingdom	11.	A
6.	-		Austria	12.	AA
7.	-		Switzerland	15.	A
8.	-2		Turkey	16.	A
9.	-		Netherlands	21.	A
10.	-		Portugal	22.	A
11.	-3		Greece	25.	A
12.	-1		Croatia	28.	A
13.	-1		Sweden	29.	BBB
14.	-1		Russian Federation	30.	A
15.	-		Belgium	32.	BBB
16.	+1		Ireland	51.	AA
17.	+2		Norway	37.	AA
18.	-4		Poland	38.	BBB
19.	-3		Czech Republic	47.	A
20.	-2		Hungary	43.	AA
21.	-1		Denmark	49.	BBB
22.	+2		Malta	53.	A
23.	-1		Slovenia	55.	AAA
24.	-3		Finland	56.	A
25.	+2		Luxembourg	60.	BBB

Europe Rank

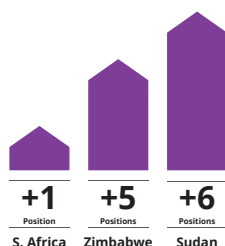
#	Variation			World Rank	CBS Rating
26.	-1		Estonia	67.	AAA
27.	+1		Cyprus	69.	BBB
28.	-5		Bulgaria	70.	BB
29.	-1		Ukraine	74.	BBB
30.	-4		Slovakia	75.	A
31.	-2		Romania	78.	A
32.	-		Lithuania	89.	BBB
33.	+3		Iceland	94.	BBB
34.	-4		Latvia	95.	BBB
35.	-4		Albania	97.	B
36.	-2		Serbia	103.	BB
37.	-4		Montenegro	106.	B
38.	-3		Belarus	112.	BBB
39.	-2		Bosnia and Herzegovina	133.	B
40.	-2		Macedonia, FYR	152.	B
41.	-2		Moldova, Rep.	160.	CCC

Africa

South Africa leaves Egypt behind

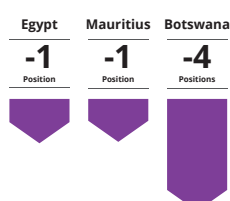


For the first time ever, South Africa tops the list in the African continent of Bloom Consulting's Country Brand Ranking © 2014 / 2015 Tourism Edition. Taking advantage of a debilitated Egypt, South Africa has steadily risen to the top slot in the region, recording a strong CBS Rating and Digital Demand - D2 ©, breaking into the global top 25. Morocco maintains its 3rd place position in Africa.



Biggest improvements

South Africa taking the leadership in the region is the most impressive change of this year's Country Brand ranking Tourism Edition in Africa. Zimbabwe and Sudan have experienced an extraordinary improvement in the ranking mainly due to their recent amazing growth rate in tourism receipts.

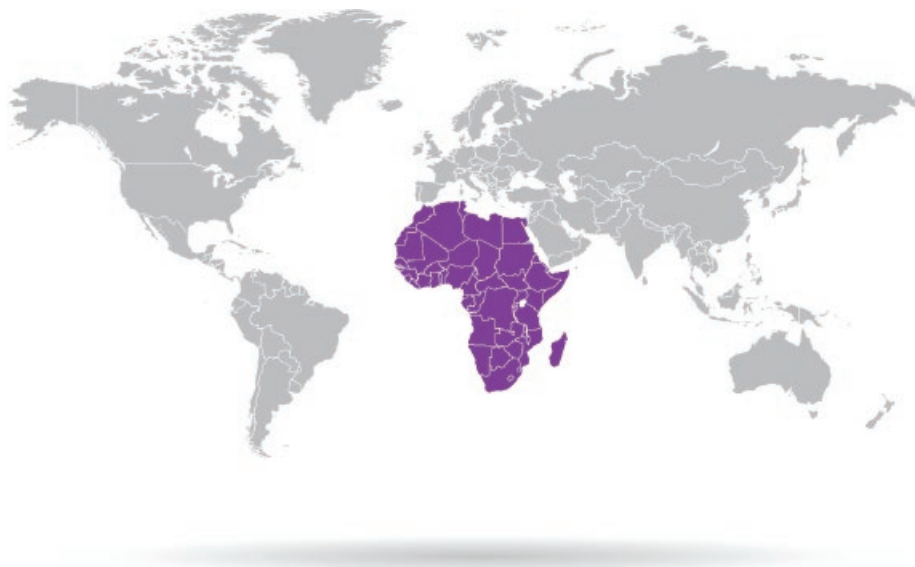


Biggest drops

Egypt, due to its continuous political instability since 2011, has finally felt the effects of a lack of security on its tourism industry. The drop in tourism receipts, a relatively weak CBS Rating and an unfavorable online presence have contributed to Egypt's position as the second strongest tourism-related Country Brand in Africa. The lack of growth in tourism receipts over the past years is the main reason to explain the losses for Mauritius (-1) and Botswana (-4) along with a better relative performance from their main competitors.

Africa

Highlights
















South Africa has overthrown the previously undefeated Egyptian tourism Country Brand. Egypt, due to its political instability, decrease in tourism receipts, relatively weak CBS Rating and unfavorable online presence, has fallen from its regional throne, dropping to only the second strongest tourism-related Country Brand in Africa. South Africa, taking advantage of a debilitated Egypt, has steadily risen to the top slot in the region, recording a strong CBS Rating and Digital Demand - D2 ©, breaking into the global top 25 for the first time.

With the exception of Egypt the top 3 countries have improved on their 2013 positions. Kenya and Tanzania tend to rely on fewer but wealthier tourists coming for safaris and other nature-centric excursions. Their strong CBS Ratings ©, tourism receipts and ever-increasing popularity help the two nations to continually improve their positions in our ranking; Tanzania, for example, has accessed the regional top five for the first time, defeating the tropical tourism paradise of Mauritius.



Outside of the regional top five, the majority of African nations – with the notable exceptions of trendy new tourist destinations like Ethiopia, Namibia, Zimbabwe and Seychelles, all of which climbed significantly in the regional ranking (Zimbabwe, for example, went up five positions, surpassing nations like Nigeria, Madagascar, and Botswana) – have lower global positions than those they held in 2013. This is mostly due to an improved focus on tourism and tourism infrastructure in other regions of the world, as well as the weaker tourism brand strategies of the many African countries with poor CBS Ratings ©. Subsequently, these nations with underdeveloped tourism industries have low Digital Demand - D2 © results and little revenue from tourism receipts.

Bloom Consulting forecasts that a stagnancy and a reduction in positions for the rest of the African Nations will occur in the next edition of the Country Brand ranking as lower numbers of Europeans will travel due to economic limitations, security issues and the Ebola crisis.

Africa Rank

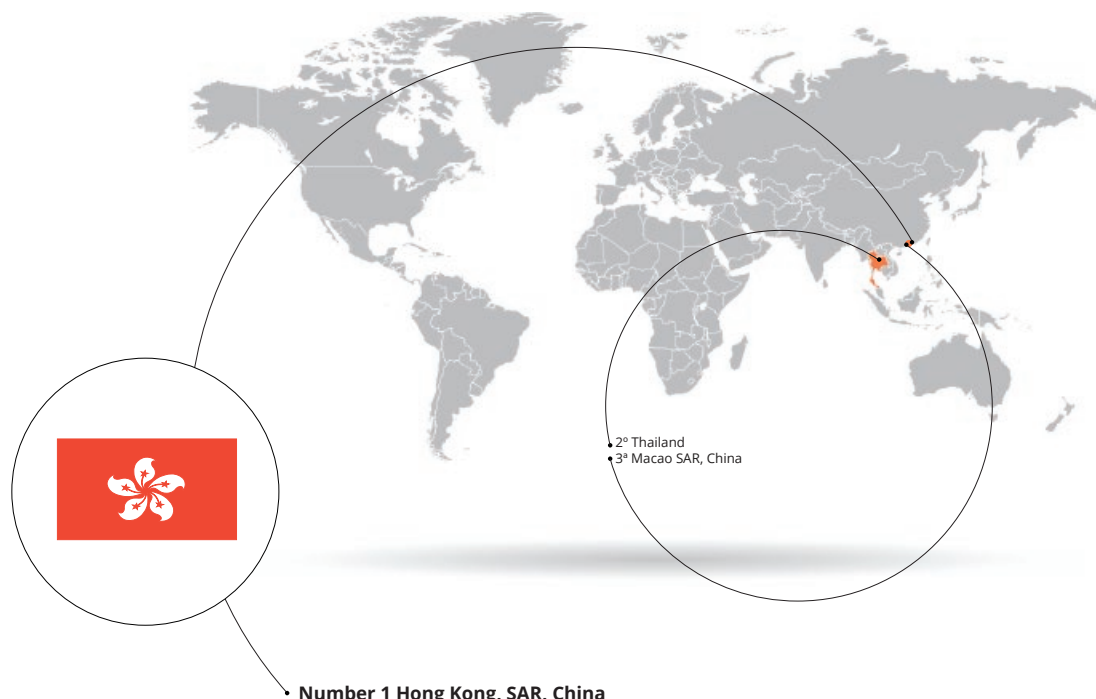
#	Variation			World Rank	CBS Rating
1.	+1		South Africa	24.	AA
2.	-1		Egypt	27.	BB
3.	-		Morocco	31.	A
4.	-		Kenya	50.	AA
5.	+1		Tanzania, United Rep.	66.	A
6.	-1		Mauritius	72.	A
7.	-		Tunisia	86.	CCC
8.	-		Uganda	91.	BB
9.	+1		Ethiopia	92.	BBB
10.	+1		Namibia	102.	BBB
11.	-2		Ghana	113.	B
12.	-		Réunion	115.	BBB
13.	+5		Zimbabwe	118.	BB
14.	+3		Seychelles	119.	B
15.	-1		Nigeria	128.	B
16.	-		Madagascar	129.	B
17.	-4		Botswana	132.	A
18.	+1		Rwanda	137.	BB
19.	+6		Sudan	139.	BB
20.	-		Angola	140.	CCC
21.	-		Cape Verde	142.	CCC
22.	+2		Mozambique	145.	B
23.	-		Zambia	151.	BB
24.	+3		Côte d'Ivoire	154.	CCC
25.	+3		Cameroon	155.	B

Africa Rank

#	Variation			World Rank	CBS Rating
26.	-4		Algeria	161.	CCC
27.	-1		Mali	165.	B
28.	+1		Gambia	166.	CCC
29.	+4		Togo	167.	B
30.	-		Benin	169.	B
31.	+6		Lesotho	171.	BB
32.	+3		Swaziland	172.	B
33.	+3		Malawi	173.	B
34.	-2		Burkina Faso	174.	BB
35.	-1		Sierra Leone	175.	CCC
36.	-		Comoros	178.	CCC
37.	+2		Guinea-Bissau	180.	C

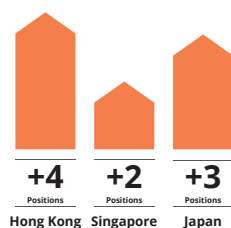
Asia

Hong Kong, small but big



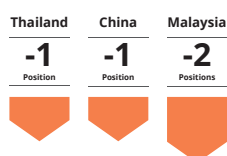
Number 1 Hong Kong, SAR, China

Hong Kong jumps into first place of the Asian Ranking this year, passing the powerful brands of Thailand, China and Macao for the first time. The impeccable online and social media performances were one of the main boosts to this new position in the Bloom Consulting Country Brand Ranking © Tourism Edition 2014 / 2015. Thailand and Macao complete the top leadership positions, both having registered excellent results in tourism receipts, while China is confined to the 4th position.



Biggest improvements

Hong Kong, the leader of Asian country brands, was also the one that registered the biggest improvement with a 4 place boost compared to last year's ranking. Japan improved its position by 3 places, thus reaffirming its indisputable brand strength with the best rating in the continent. Singapore reached the Top 5 for the first time with a two place improvement thanks to its Digital Demand - D2 ©.



Biggest drops

Due to its poor CBS Rating and lower Digital Demand - D2 ©, Malaysia registered one of the biggest drops in Asia this year. However, the Malaysian brand still managed to get into the regional Top 10. China and Thailand both dropped down one position to make way for Hong Kong's ascendance in this year's ranking, Thailand due to its CBS Rating and China due to its social media performance.

Asia

Highlights




























Asia has become an increasingly prominent tourist destination, and in Bloom Consulting's Country Brand Ranking © 2014 / 2015 Tourism Edition, the continent claims a third of the spots in the global top 30.

Like the Americas, the continent has seen the majority of countries improve on their global rankings from last year. These stellar results are in part due to the ever-growing Digital Demand - D2 © for the region, often resulting from the touristic interests of the Chinese markets. Four of the top five countries for global Digital Demand - D2 © results are Asian nations, led by Japan, Singapore, and Hong Kong. All three of these countries display impressive results in the global Country Brand ranking, each recording significant improvement on their rankings from last year. Due to its impressive four-position jump past countries like Thailand and China, Hong Kong also comes first overall for the region, a placement affected by this high Digital Demand - D2 © score. Thailand, on the other hand, has seen no movement, but has been able to maintain its large volume of tourists and tourist receipts to stay at the second position in Asia.




















Outside of the regional top five, however, there are a couple of notable decreases in ranking. Malaysia has fallen to eighth place regionally, defeated by Singapore, Japan, and South Korea, while the United Arab Emirates (UAE) has followed suit, plummeting multiple spots and falling out of both the global top 25 and the regional top ten. The UAE's new and underdeveloped online presence, as well as low Digital Demand - D2 © for the overall Country Brand (that is, not for its famous components of Dubai and Abu Dhabi), has not been cultivated sufficiently to economically benefit the nation.

Despite the failure of some Country Brands, many Asian countries recorded improvement in this year's Country Brand ranking. Subsequently, future editions may see the even greater dominance of Asian tourism markets in the global top 25.

Asia Rank

#	Variation			World Rank	CBS Rating
1.	+4		Hong Kong SAR, China	4.	BBB
2.	-1		Thailand	6.	A
3.	+1		Macao SAR, China	8.	AA
4.	-1		China	9.	BBB
5.	+2		Singapore	13.	A
6.	+3		Japan	14.	A
7.	+1		Korea, Rep.	18.	A
8.	-2		Malaysia	19.	BBB
9.	+2		India	23.	BBB
10.	+2		Taiwan	26.	BB
11.	-1		United Arab Emirates	34.	A
12.	+1		Indonesia	36.	BB
13.	+1		Saudi Arabia	42.	BBB
14.	+3		Philippines	46.	A
15.	-		Lebanon	48.	BBB
16.	-		Israel	51.	BBB
17.	+2		Viet Nam	57.	B
18.	-		Jordan	62.	BB
19.	+4		Sri Lanka	63.	A
20.	+5		Maldives	64.	BBB
21.	+5		Qatar	76.	BBB
22.	-1		Cambodia	80.	BB
23.	-1		Iran	81.	B
24.	+3		Oman	82.	B
25.	-1		Bahrain	84.	BB

Asia Rank

#	Variation			World Rank	CBS Rating
26.	+2		Kazakhstan	85.	BB
27.	+3		Nepal	88.	AA
28.	+3		Georgia	96.	BBB
29.	+5		Pakistan	99.	BB
30.	+3		Azerbaijan	101.	BB
31.	-2		Iraq	107.	CCC
32.	+4		Kuwait	109.	BBB
33.	-3		Yemen	114.	B
34.	-		Syrian Arab Republic	116.	CCC
35.	-		Armenia	121.	BBB
36.	+1		Lao P.D.R.	127.	B
37.	+3		Palestine	134.	B
38.	+1		Mongolia	136.	BB
39.	+3		Myanmar	143.	B
40.	-2		Kyrgyzstan	147	B
41.	-		Afghanistan	159.	CCC
42.	+1		Bangladesh	162.	B
43.	+1		Bhutan	164.	CCC
44.	+2		Tajikistan	177.	B

Oceania

Things will never change



Number 1 Australia

Australia is the ultimate destination in Oceania and one of the most desired brands worldwide. It has no comparable competitor in Oceania not only due to the development of its tourism industry but also to the appeal it generates among tourists internationally. In fact, it's the number 1 destination in the world in terms of social media presence and also has a high Digital Demand - D2 © performance too.

Number 2 New Zealand

New Zealand shows an overall improvement globally, making it into the Top 35. This is a remarkable position as it confirms its strong positive trend as a tourism destination. New Zealand's touristic growth it is not yet reflecting its upcoming appeal that we observe in social networks and online performance.

Biggest improvements and drops

Overall in Oceania, there are no relevant improvements as all the countries remain stable. However, from a global perspective, we are able to observe that Australia and New Zealand managed to climb positions globally whereas French Polynesia shows a notable decrease (-10). Completing the top country brands we find Fiji and Vanuatu, both managing to maintain the same positions as last year.

Oceania

Highlights















The regional ranking for Oceania continues to be dominated by Australia, a country whose brand successfully manages a strong online presence and an attractiveness that draws huge levels of tourism receipts. These factors combine to place the nation as the fifth most powerful Country Brand worldwide. The country even ranks as the top performer in the world in terms of social media and online presence. Australia is only missing an improved CBS Rating to achieve the perfect Country Brand.

The regional top five is completed by New Zealand, Fiji, Vanuatu, and French Polynesia. New Zealand is the only close regional competitor to Australia, ranking 28 places below the regional giant in the global ranking, but still improving to 35th overall from its 2013 placement. New Zealand is known for its incredibly successful Country Brand marketing, with a strong online presence in both social media and on its NTO homepage. The country even boasts a stronger CBS Rating than Australia.

Fiji, which ranks third regionally, is still far behind Australia and New Zealand on a global scale, ranking only 104th in our worldwide ranking. Vanuatu and French Polynesia lag even farther behind, and like Fiji have little chance of taking over Australia and New Zealand's dominance in the regional top five. Not many countries in Oceania have a positive Country Brand outlook, besides Australia and New Zealand, and the only nations to show any global or regional improvement from 2013 are Palau and the Solomon Islands. Unsurprisingly, with the exception of a switch in position between the Cook Islands and Palau, there were no changes of order in the regional ranking.

Oceania Rank

#	Variation			World Rank	CBS Rating
1.	-		Australia	7.	BBB
2.	-		New Zealand	35.	AA
3.	-		Fiji	104.	B
4.	-		Vanuatu	126.	BBB
5.	-		French Polynesia	138.	B
6.	-		New Caledonia	144.	BB
7.	-		Samoa	148.	BB
8.	-1		Cook Islands	157.	B
9.	+1		Palau	153.	B
10.	-		Solomon Islands	168.	BB
11.	-		Tonga	176.	CCC
12.	-		Micronesia	179.	CCC

Bloom Consulting Country Brand Ranking ©

Frequently Asked Questions

Why did Bloom Consulting develop its Country Brand ranking?

Bloom Consulting created its Country Brand ranking as a means of evaluating the impact of Country Brand strategies in primarily economic terms. Our ranking is effective in analyzing the appeal of a Country Brand, and is therefore useful as a tool for increasing a Country Brand's success.

How does Bloom Consulting's Country Brand Ranking © differ from other similar rankings?

While other Country Brand rankings tend to focus on soft data, such as surveys and expert opinions, Bloom Consulting's Country Brand Ranking © focuses on tangible data, analyzed with its Digital Demand - D2 © tool and relevant, proprietary statistical models. Furthermore, Bloom Consulting splits its Country Brand analysis in separated dimensions from its Brand Wheel ©, instead of creating a combination of factors thus providing a more detailed and thorough analysis in each specific dimension; while this report deals solely with Tourism, we also publish a Country Brand ranking for Trade (Investment).

Who benefits from the information in Bloom Consulting's Country Brand Ranking ©?

Our Country Brand ranking is valuable for anyone interested in Country Branding, whether that interest derives from professional, academic, or personal motives, for this specific ranking provides invaluable information for tourism professionals.

What is new in the 2014 / 2015 edition of Bloom Consulting's Country Brand ranking?

The 2014 / 2015 edition of our Country Brand ranking places more focus than ever before on the importance of online appeal to the success of a Country Brand. For this reason, both the Digital Demand - D2 © variable and the online presence variable hold a more significant weight in a country's final ranking.

What is Digital Demand - D2 ©?

Bloom Consulting's Digital Demand - D2 © is a proprietary tool developed for the sake of quantifying and measuring the total global search volume for country-specific, tourism-related keywords across nine languages.

How is it possible for a Country Brand to have both a poor CBS Rating and a high overall position in the Country Brand ranking?

A country's CBS Rating only evaluates the accuracy of its Country Brand strategy, as derived from a comparison between the strategic positioning of its NTO and the actual demand from tourists discerned by our Digital Demand - D2 © tool. Subsequently, although a country's total tourism receipts may be incredibly high, its tourism strategy may not be maximizing the Country Brand's full potential.

Why are some countries not featured in Bloom Consulting's Country Brand Ranking ©?

In order to appear in the ranking a country needs to have data in all 4 variables. If a country does not provide official data to UNWTO or does not have a functional official NTO website working, it is not included in Bloom Consulting's Country Brand Ranking ©. Nevertheless, if a country does not maintain official pages on social media platforms, it is still included in the ranking, but receives a lower score for the fourth variable.

What criteria defines the geographical regions used to group countries in the Ranking?

Bloom Consulting uses the United Nations' official regional classification system as a guideline.

What other services does Bloom Consulting provide?

Apart from our Country Brand ranking, Bloom Consulting develops integrated Country, Region and City Brand strategies, as well as revolutionary Digital Demand - D2 © reports tailored to any destination in the world.

Bloom Consulting Country Brand Ranking ©

Glossary

Digital Demand - D2 ©

Bloom Consulting's proprietary tool for measuring the total "search volume" from the most important search engine across nine different languages.

Country Brand Strategy Rating (CBS Rating)

Bloom Consulting's rating technique evaluating the accuracy of NTO strategic positioning.

Brandtags

A series of 40 distinct categories comprised of keywords used in online searches, each encompassing a different tourism-related activity or attraction.

3T Approach

Bloom Consulting's focus on the three most tangible dimensions of a Country Brand: Trade (Investment), Tourism, and Talent.

Bloom Algorithm

Our proprietary equation that calculates a Country Brand's ranking by assessing four key variables.

National Tourism Organization (NTO)

The official national agency responsible for the touristic promotion of its respective Country Brand.

Web Analytics

An online tool that analyzes the performance of an NTO website through variables such as number of visits and amount of time spent on its webpage.

Bloom Consulting

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