Digital Identity

Understanding the digital appeal and footprint of countries

UNWTO Regional Conference

Windhoek, Namibia

June 14th, 2021
Part I – Introduction to Digital Identity

Part II – Measuring your Digital Appeal/ Covid-19 Recovery
  Covid-19 impact on Africa and its regions
  Conclusions

Part III – Understanding your Digital Footprint
  Case study
  Conclusions
Part I – Introduction to Digital Identity

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Case study
Conclusions
The new frontier for countries is the digital identity
The “search” is a new KPI for countries, regions and cities
#Digital_identity
#Digital_country
Bloom Consulting
Countries Regions and Cities

#Digital_identity

Demand
Digital_identity

Demand

Supply
Digital Demand

Digital Supply

#Digital_identity
Part I – Introduction to Digital Identity

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#Digital_identity
COVID-19 has had an unprecedented impact on the tourism industry
“Pre-pandemic 2019 levels will be reached in between two and a half and four years, depending on different scenarios.”

*Manuel Butler, Executive Director of the UNWTO (Nov 2020)*

“Travel experts are now very cautious in their outlook, with the majority not expecting a return to pre-pandemic levels before 2023”.

*UNWTO survey*
“Pre-pandemic 2019 levels will be reached in between two and a half and four years, depending on different scenarios.”

Manuel Butler, Executive Director of the UNWTO (Nov 2020)

“Travel experts are now very cautious in their outlook, with the majority not expecting a return to pre-pandemic levels before 2023”

World Economic Forum

“Tourism receipts worldwide are not expected to recover to 2019 levels until 2023”

IMF - International Economic Fund expert

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MANUEL BUTLER, EXECUTIVE DIRECTOR OF THE UNWTO (NOV 2020)
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Manuel Butler, Executive Director of the UNWTO (Nov 2020)

“Travel experts are now very cautious in their outlook, with the majority not expecting a return to pre-pandemic levels before 2023”

World Economic Forum

“Recovery levels may be as late as 2024.”

McKinsey

“Under IATA’s baseline scenario, traffic will stage a recovery to 2019 levels in 2023”.

Deloitte

“Tourism receipts worldwide are not expected to recover to 2019 levels until 2023”

IMF - International Economic Fund expert
Covid-19
The Impact on Tourist Behaviours

A Bloom Consulting and D2 Analytics study
Published on May 2020
Global Study of Covid-19 impact heavily on tourism and talent

Ratio between positive and negative perceptions

Positive perception  | Negative perception
---|---
1,8 | 1

Neutral effect

Positive and negative perception affecting brand dimensions

- Negative impact  
- Positive impact

<table>
<thead>
<tr>
<th>活动</th>
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<th>BO positive</th>
</tr>
</thead>
<tbody>
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<tr>
<td>Live / Work</td>
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</table>

Neutral effect
Intention to travel just after the 1st wave

**Scenario 1**
Restrictions are over, high chances of getting the virus.

Travel restrictions are over, and you are sure there will be no quarantine upon entering your chosen destination.

Will you travel again in the next 12 months for leisure purposes?
- Yes ■ No
  - Yes: 66%
  - No: 34%

**Scenario 2**
Virus is nearly eradicated, a treatment is found.

Finally, the light at the end of the tunnel. A cure is found, you can get sick, but medication is now available to treat you.

Will you travel again in the next 12 months for leisure purposes?
- Yes ■ No
  - Yes: 35%
  - No: 65%

**Scenario 3**
Virus is fully eradicated, back to basics.

Yuppie, everything is ok now, the Covid-19 virus is contained and fully eradicated. That’s a sure reality.

Will you travel again in the next 12 months for leisure purposes?
- Yes ■ No
  - Yes: 15%
  - No: 85%
Despite the lockdown and fear...
Despite the lockdown and fear...

Tourists show high intention to travel!
The Digital Demand data allows destinations to understand the changes in the search behavior compared to a pre-Covid scenario.

- How much are tourists searching?
- What is the current impact of Covid-19?
- What activities are tourists searching for?
- Where are the searches coming from?
- When are tourists searching?
<table>
<thead>
<tr>
<th>General Information</th>
<th>Accommodation</th>
<th>Touristic activities</th>
</tr>
</thead>
</table>
| Destinations; Short Trips; Tourism; Tourism Attractions; Tourism Packages;; Tours; Travel | All-inclusive Accommodation; Camping; Holiday Accommodation; Hostels and Bed & Breakfast; Hotels and Resorts; Luxury Accommodation; Airbnb and other Special Accom; Rural and sustainable Accom | Cultural Assets
Gastro Activities;
Historical Sites;
Museums;
Performing Arts;
Religious Sites & Pilgrimage;
Restaurants;
Traditional Markets;
UNESCO;
Urban Landmarks

Niche Markets
Business;
Couples;
Cruises;
Family;
LGBT;
Luxury Tourism;
Medical Tourism;
Sustainable & Rural;
Backpackers

Leisure and Entertainment
Entertainment Parks;
Aquarium & Zoo;
Beaches;
Gambling;
Golf;
Nightlife;
Shopping;
Special Events;
Wellbeing

Outdoor and Nature
Adventure and Outdoor;
Animal Watching;
Boating;
Diving;
Fishing & Hunting;
Hiking;
Natural Wonders and Parks;
Water Sports;
Winter Sports
### General Information

- Destinations;  
- Short Trips;  
- Tourism;  
- Tourism Attractions;  
- Tourism Packages;  
- Tours;  
- Travel

### Accommodation

- All-inclusive Accommodation;  
- Camping;  
- Holiday Accommodation;  
- Hostels and Bed & Breakfast;  
- Hotels and Resorts;  
- Luxury Accommodation;  
- Airbnb and other Special Accom;  
- Rural and sustainable Accom

### Touristic activities

#### Cultural Assets
- Gastro Activities;  
- Historical Sites;  
- Museums;  
- Performing Arts;  
- Religious Sites & Pilgrimage;  
- Restaurants;  
- Traditional Markets;  
- UNESCO;  
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#### Niche Markets
- Business;  
- Couples;  
- Cruises;  
- Family;  
- LGBT;  
- Luxury Tourism;  
- Medical Tourism;  
- Sustainable & Rural;  
- Backpackers

#### Leisure and Entertainment
- Entertainment Parks;  
- Aquarium & Zoo;  
- Beaches;  
- Gambling;  
- Golf;  
- Nightlife;  
- Shopping;  
- Special Events;  
- Wellbeing

#### Outdoor and Nature
- Adventure and Outdoor;  
- Animal Watching;  
- Boating;  
- Diving;  
- Fishing & Hunting;  
- Hiking;  
- Natural Wonders and Parks;  
- Water Sports;  
- Winter Sports

---

**Covid-19 strong impact**
How is the Covid-19 crisis affecting countries?
How is the Covid-19 crisis affecting countries?

- **8.5%**
  - Northern America

- **29.7%**
  - Central America & Caribbean

- **22.3%**
  - South America

Generic, Accommodation and Activities brandtags YoY growth Apr 2020 - Mar 2021
How is the Covid-19 crisis affecting countries?

-8.5% Northern America
-29.7% Central America & Caribbean
-22.3% South America
-34.8% Asia
-22.0% Oceania

Generic, Accommodation and Activities brandtags YoY growth Apr 2020-Mar 2021
How is the Covid-19 crisis affecting countries?

- **8.5%**  
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- **19.1%**  
  Europe

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-19.1%  
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-34.8%  
Asia

-27.1%  
Africa

-22.0%  
Oceania
Africa international touristic appeal during Covid-19 (Apr ’20 – Mar ’21)
Africa international touristic appeal during Covid-19 (Apr ’20 – Mar ’21)

45,2 million searches in 2020/2021*

-27,1% Covid-19 impact YoY** 2020-2021

*the data is refreshed yearly according to the providers' new terms and policies of the most popular search engines in the world

**Data from April 2020 to Mar 2021
Africa was constantly growing, until the beginning of the pandemic
Crisis hits Africa softly until June, increases in July and stabilizes

- searches 2021 vs 2020
How has the tourist behaviour changed due to Covid-19?
Pyramids
Cities

Top Micro-Brandtags Africa
(Searches Apr 2020 - Mar 2021)
Beaches
Tourist search behaviour changes...

**Tourism**

Benchmark searches Apr 2020 – Mar 2021  

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<th>Micro-Brandtags</th>
<th>Covid Impact</th>
<th>Position</th>
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<tr>
<td>1</td>
<td>Pyramids</td>
<td>+18,2%</td>
<td>▲2</td>
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<tr>
<td>2</td>
<td>Travel</td>
<td>-41,6%</td>
<td>▼1</td>
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<tr>
<td>3</td>
<td>Cities</td>
<td>+21,1%</td>
<td>▲1</td>
</tr>
<tr>
<td>4</td>
<td>Holiday Packages</td>
<td>-57,0%</td>
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<tr>
<td>5</td>
<td>Tourism</td>
<td>-25,5%</td>
<td>-</td>
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<tr>
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<td>10</td>
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Tourist search behaviour changes, packages and tours are the ones which decrease the most

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Tourist search behaviour changes, packages and tours are the ones which decrease the most, whereas the cultural ones, don’t get affected

### Tourism

Benchmark searches Apr 2020 – Mar 2021

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Bloom Consulting
Countries Regions and Cities

Positive impact

Searches (Apr 2020 – Mar 2021)

-80%
-50%
-20%
0
+20%
+50%
+80%

-80% - 50% - 20% 0 +20% +50% +80%

4M
30k
500k
100k
Bloom Consulting
Countries Regions and Cities

Searches (Apr 2020 – Mar 2021)

-80% -50% -30% 0 +30% +50% +80%

Positive impact

Negative impact

Deserts
Towns
Coastline
Regions
Lakes
Pyramids
Cities
Mosques
UNESCO
Tourism
Farmhouses
Cosmetic
Surgeries
Beach
Accommodation
Castles and Fortresses
Beach
Camping
Natural
Wonders

Searches

4M
30k
500k
100k
30k
100k
500k
In detail by region

Western Africa
Northern Africa
Eastern Africa
Central Africa
Southern Africa

*regions based on the UN classification*
In detail by region

Western Africa
5,7m searches (Apr ‘20 – Mar ‘21)
-27,7% Covid-19 impact

Northern Africa
19,6m searches (Apr ‘20 – Mar ‘21)
-28,2% Covid-19 impact

Eastern Africa
9,3m searches (Apr ‘20 – Mar ‘21)
-19,8% Covid-19 impact

Central Africa
1,0m searches (Apr ‘20 – Mar ‘21)
+7,8% Covid-19 impact

Southern Africa
9,4m searches (Apr ‘20 – Mar ‘21)
-33,0% Covid-19 impact

*regions based on the UN classification
In detail by region

- searches 2021 vs 2020

Western Africa

Northern Africa

Eastern Africa

Central Africa

Southern Africa
Conclusions – Competitive landscape and Africa’s touristic appeal
Conclusions – Competitive landscape and Africa’s touristic appeal

1. Despite lockdown and fear, tourists continue to search.

2. Covid-19 is having a softer impact on Northern America and European countries than in the rest of the world.

3. Africa has lost a -27.1% of its touristic appeal during Covid-19.

4. In Africa, Covid-19 has had a negative impact for holiday packages, tours, accommodations, tourism and travel, while not affecting historical and cultural sites.

5. Northern Africa, despite one of the highest Covid-19 impacts (-28.2%) remains the most searched touristic region in Africa.

6. Eastern and Southern Africa regions are very close in terms of the number of searches, while the Covid-19 impact is mild for the Eastern region, and highly negative for the Southern.
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Digital_identity
Things To Do In Finland | 10 Best Things to Do and More

Book your activities without the stress. We offer free and easy 24 hour cancellation. Find and pick from our wide selection of top-rated tours and activities for your trip. Multiple languages. Flexible booking. Over 40,000 activities. 2 million trusted reviews. Best price guarantee.

Santa Claus Village
Discover an iconic attraction. Find top-rated tours and tickets.

Finland
Make your next trip unforgettable. Find the best tours and activities.

Top things to do in Finland

Suomenlinna
Walking trails & Suomenlinna
Santa Claus Village
Year-round Christmas-themed
Temppeliaukion Church
1960s church excavated into rock
Helsinki Cathedral
Landmark 19th-century religious

[1] 10 Best Things to do in Finland — VisitFinland.com
So, you’re dreaming of coming to Finland, “Land of the Midnight Sun”, for your holiday? Not sure where to start planning and what to do? From glass igloos to ...

[2] 25 Best Things To Do In Finland - The Crazy Tourist
https://www.thecrazytourist.com » Travel Guides » Finland +
25 Best Things To Do In Finland. Meet Mr. and Mrs. Learn some history at Sida Museum. Source: wikimedia. Dine at Restaurant Aasaar. Source: hotelkultahovi. Explore Ouluniina. Source: flickr. Have a picnic at Suomenlinna. Source: youtube. Go skiing in Levi. Source: flickr. Visit the animals at Helsinki Zoo. Dig for ...

[3] 356 Cool and Unusual Things to Do in Finland - Atlas Obscura

How to analyse this data?
A practical guide on how to assess the digital footprint of your country though a case study
Digital content for Tourism searches for “VisitMyCountry”

*Top 10 results for sections All, Videos and Images in Tourism

30,3 Thousand unique results

7,5 thousand contributors

Filters: Top 10 results, 10 markets
## Tourism – Contributors by Section

**Filters: Top 10 results, 10 markets**

<table>
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<tr>
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**Case study Illustrative Data**

## Tourism – Contributors by Section

*Filters: Top 10 results, 10 markets*

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</table>
Content allocated in top 10 by “VisitMyCountry”

Filters: Top 10 results, 10 markets

Number of Unique Articles

142 unique articles

Target Markets

<table>
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Top Micro-Brandtags

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<td>Congresses &amp; Conventions</td>
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<tr>
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Total 76 Micro-Brandtags

Date of Publication

Case study
Illustrative Data
Volume measured in number of articles is one part, however, it is important to understand the share of content provided...
Volume measured in number of articles is one part, however, it is important to understand the share of content provided

How many of the top brandtags are covered?
Top 10 brandtags covered by official agencies in the ALL section

<table>
<thead>
<tr>
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<th>Micro - Brandtags (generic + activities)</th>
<th>ALL Section</th>
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<tr>
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<td>Travel</td>
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</tr>
<tr>
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<td>Beaches</td>
<td>Yes</td>
</tr>
<tr>
<td>3</td>
<td>Things to do</td>
<td>Yes</td>
</tr>
<tr>
<td>4</td>
<td>Tourism</td>
<td>Yes</td>
</tr>
<tr>
<td>5</td>
<td>Places to Visit</td>
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<tr>
<td>6</td>
<td>Visit</td>
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</tr>
<tr>
<td>7</td>
<td>Tours</td>
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<tr>
<td>8</td>
<td>Surf</td>
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<tr>
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50% Covered top10

Top 20 Results Cover

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70% Covered top10

Top 30 Results Cover

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</table>

90% Covered top10

Top 40-50 Results Cover

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<td>10</td>
<td>Jungles and Forests</td>
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</table>

100% Covered top10
What we learnt with this case study:

- “VisitMyCountry” first-party content is only well positioned in the ALL section, while in Videos it is less present, and for Images even less so.

- There is a need to create and allocate more content to match the current touristic demand, as only 50% of the demand is covered.

- Third parties content is appearing in top brandtags and must be analysed to see if it is aligned to the brand strategy (On-brand).
Digital identity software applications

**Insights**

- Nation brand strategy
- Product definition
- Market segmentation
- Digital Marketing strategy
- Content creation allocation
- Partners mapping

**Measurement**

- Brand appeal and evolution
- Benchmarking
- Marketing campaigns ROI (in searches)
- SEO assessment (rank by Micro-Brandtag)
- Rank / Top contributors
- Mapping of the PR efforts and results
- Content allocation
General recommendations and considerations on how to manage a country’s digital footprint
General recommendations and considerations on how to manage a country’s digital footprint

1. It is important to continue monitoring the brand appeal (demand) globally and by brandtag, as well as the content strategy allocation (supply) as more than 50% of the content created on the last two years is new.

2. Use the demand insights for last year to understand the effects of Covid-19 when defining the recovery strategy for the following year.

3. Everything you do moving forward, aim to build your “digital legacy” along the way, and pay attention to the ALL sections also to Images and Videos sections as well as target audience native languages.

4. If you’re not the primary source of content, someone else will be. Aim for a 90% first-party content coverage for strategic brandtags and assess third-party content of strategic partners to understand and influence the current and future content creation.

5. The D2 software will allow you to complement other datasets, but much more detail micro-segmentation as it can be done by origin, brandtag, language, contributor and section.
And the last recommendation ...
Search and you shall find
Thank you!
bloom-consulting/journal

Olga Nowak
Place Analytics Consultant

onowak@bloom-consulting.com

@bloomconsult