

# A Data-Powered Approach to Balance

*How DMOs can leverage data to foster sustainable tourism*

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Director of Intelligence and Marketing - ForwardKeys

# ForwardKeys data captures and reflects the entire traveller journey



## SUPPLY



Schedules



Seat Capacity

# ForwardKeys data captures and reflects the entire traveller journey

## SUPPLY

## DEMAND



Schedules



Searching



Booking



Arriving



Staying



Departing



Seat Capacity

Flight Searches

Actual Air Reservations + Actual Air Tickets + Total Air Market

# ForwardKeys data captures and reflects the entire traveller journey

## FUTURE

### SUPPLY

### DEMAND



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Seat Capacity



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Booking

Actual Air Reservations + Actual Air Tickets + Total Air Market



Arriving



Staying



Departing



Future

Forward-Looking  
Capacity and Tickets

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## DEMAND



Arriving



Staying



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ForwardKeys

# Measuring tourism: What does the data say?

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# Air Capacity Continues to Grow



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# Summer Tourism Set for a Record Year in Air Capacity

International Air Capacity Arrivals; variation vs previous year

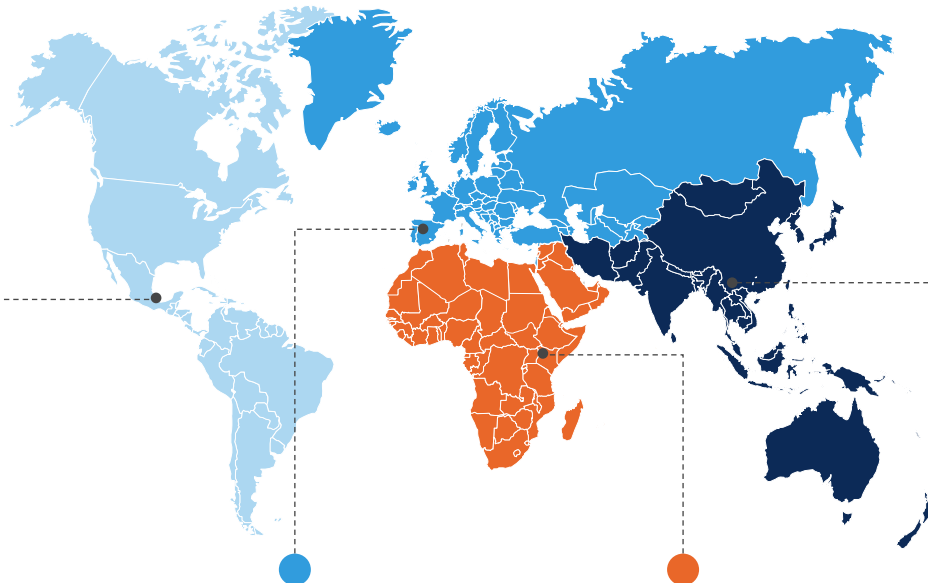
51

## Worldwide international tourist arrivals

Full year 2025: +6%

Summer 2025: +6%

*\*summer = June, July and August*



### The Americas

Full year 2025: +6%

Summer 2025: +6%

### Europe

Full year 2025: +6%

Summer 2025: +5%

### Africa & Middle East

Full year 2025: +6%

Summer 2025: +4%

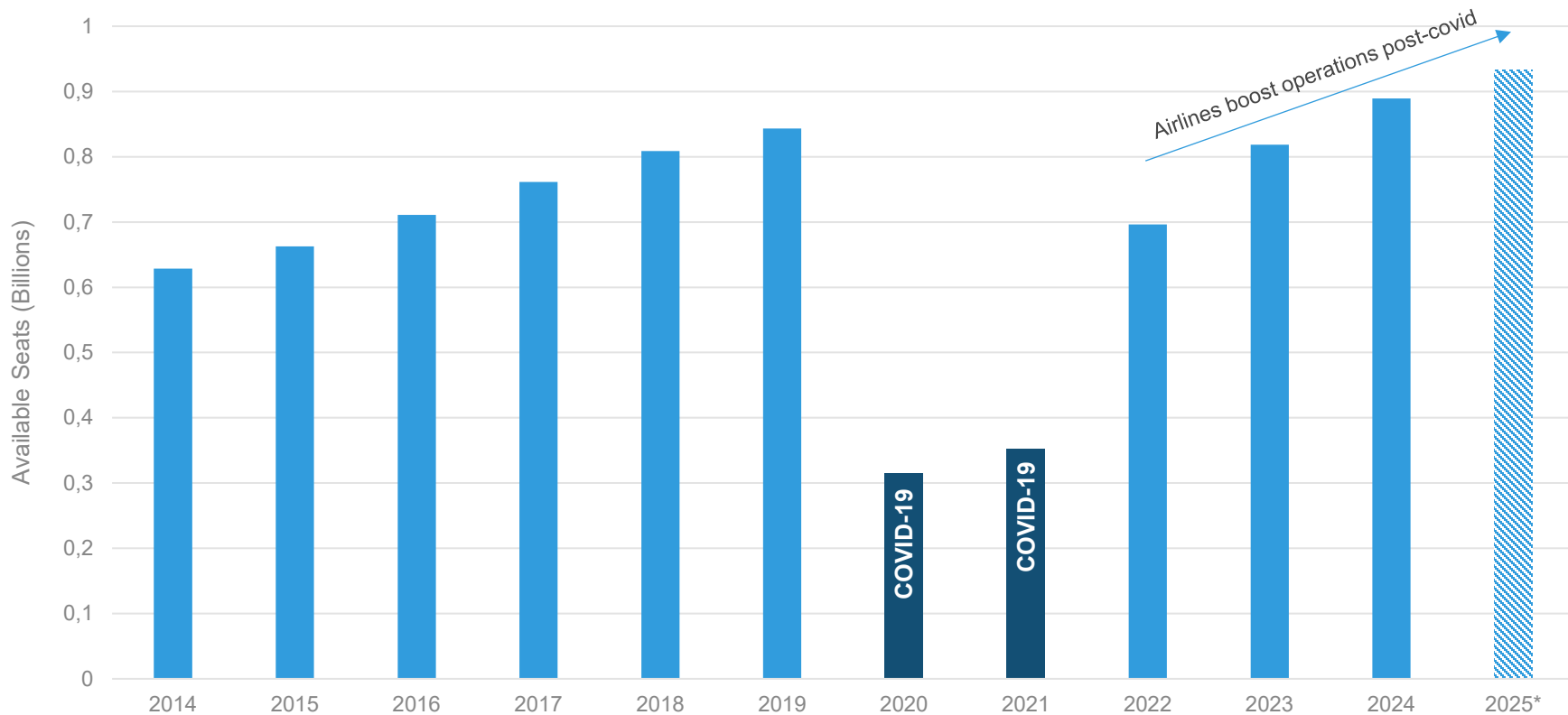
### Asia Pacific

Full year 2025: +8%

Summer 2025: +8%

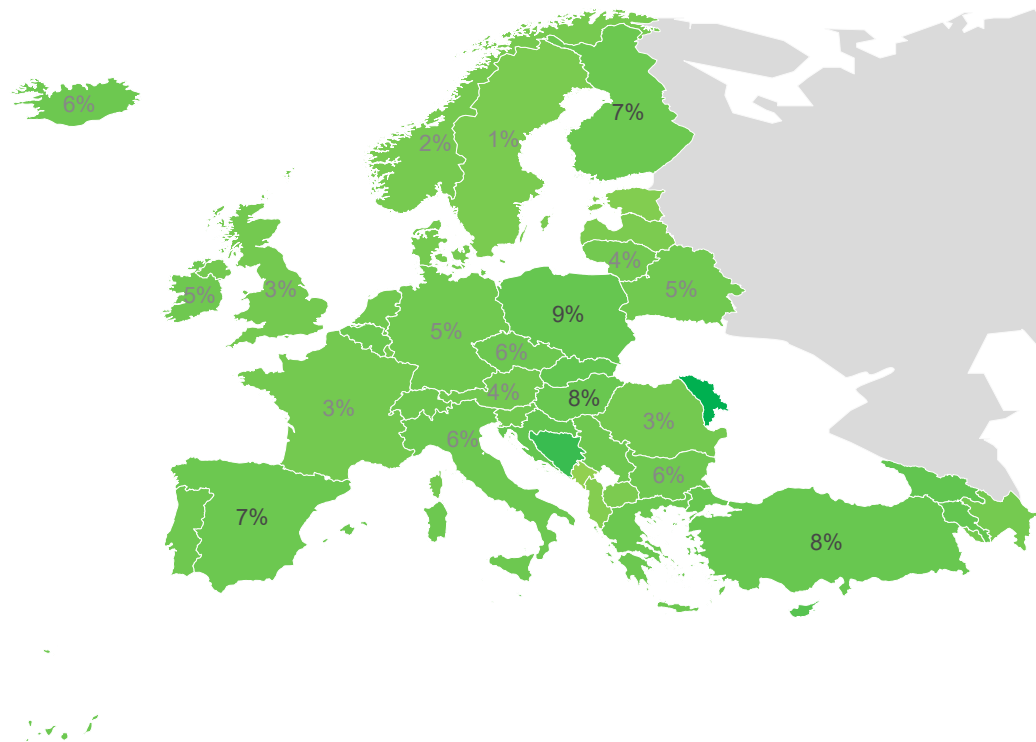
# EU27 & UK Air Supply continues to break records

Flown and Forecasted available seats for international flights arriving to EU27 & UK destinations



# Airlines boost operations relatively evenly throughout Europe

Flown and Forecasted available seats for international flights arriving to EU27 & UK destinations in 2025; vs previous year



Top Performing Destinations*	Year-over-year variation
Warsaw	+13%
Alicante	+12%
Athens	+10%
Malaga	+9%
Budapest	+8%
Bucharest	+7%
Prague	+7%
Copenhagen	+7%
Barcelona	+7%
Milan	+7%
EU27 & UK	+5%

Powered by Bing *\*considering EU27 & UK cities that represent more than 1% share*

© GeoNames, Microsoft, Open Places, OpenStreetMap, TomTom

# Travel demand remains stable



# Top Summer Demand Is Spread Across Diverse European Destinations

Forecasted tourist arrivals to EU27 & UK Summer (Jun to Aug) 2025 vs 2024; variation vs previous year

Destination*	% Share	Var vs 2024
Brussels	1%	+18%
Manchester	1%	+12%
Alicante	2%	+12%
Faro	1%	+8%
Malta	1%	+6%
Malaga	2%	+4%
Milan	2%	+4%
Porto	2%	+4%
Edinburgh	1%	+3%
Prague	1%	+2%

*\*considering destinations that represent more than 1% share*





ForwardKeys

# What is Destination Management?

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# Dispersal strategies in time and space

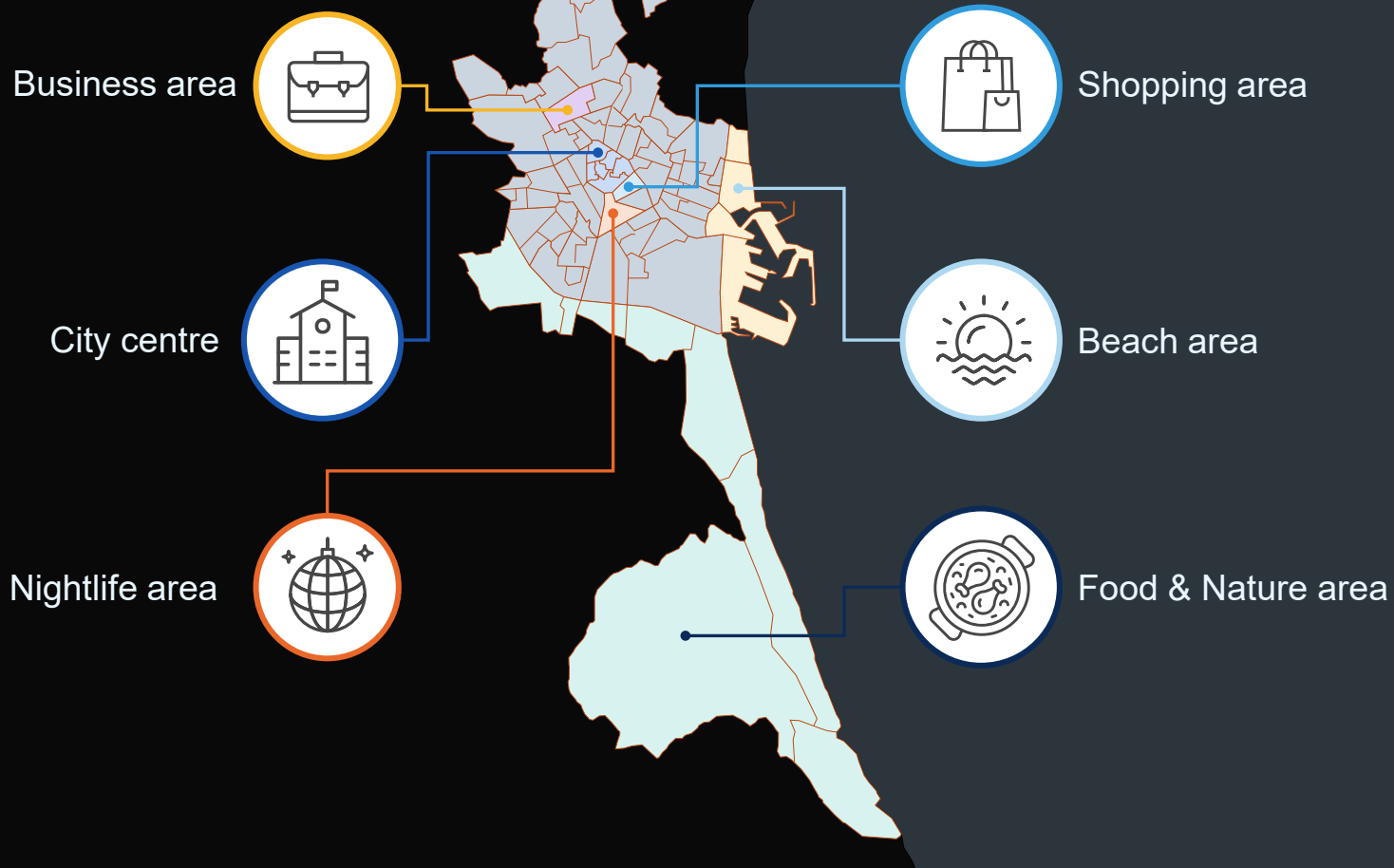


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# Valencia at a glance





Step 1



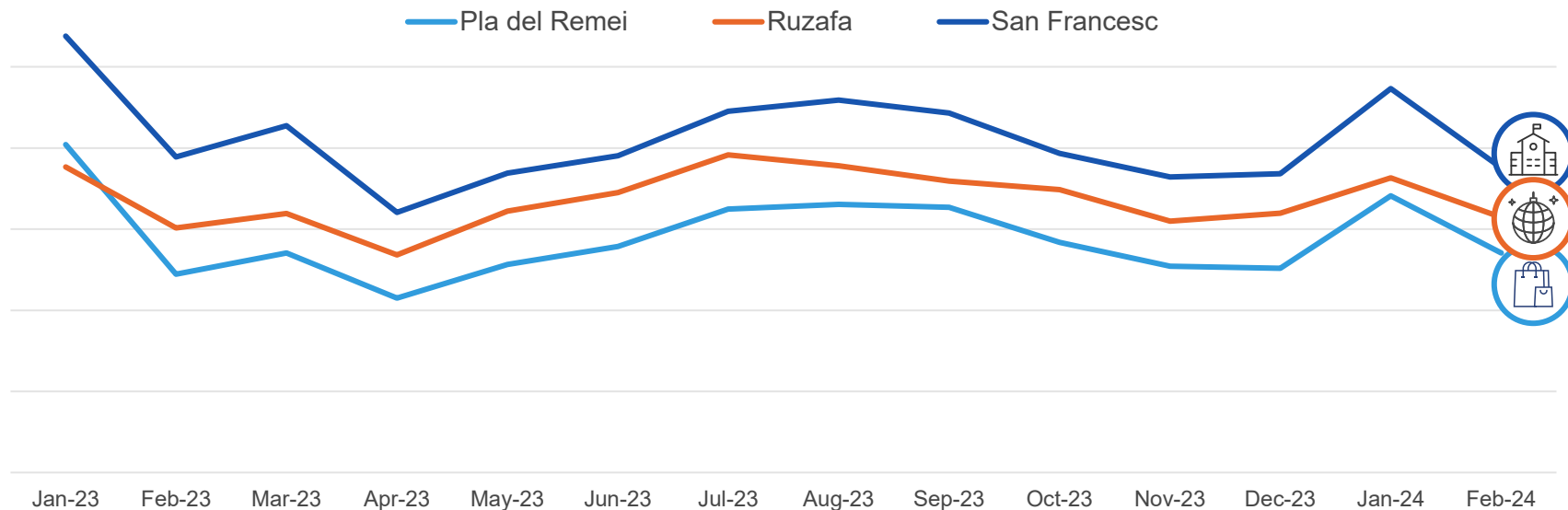
# Identify the busiest areas

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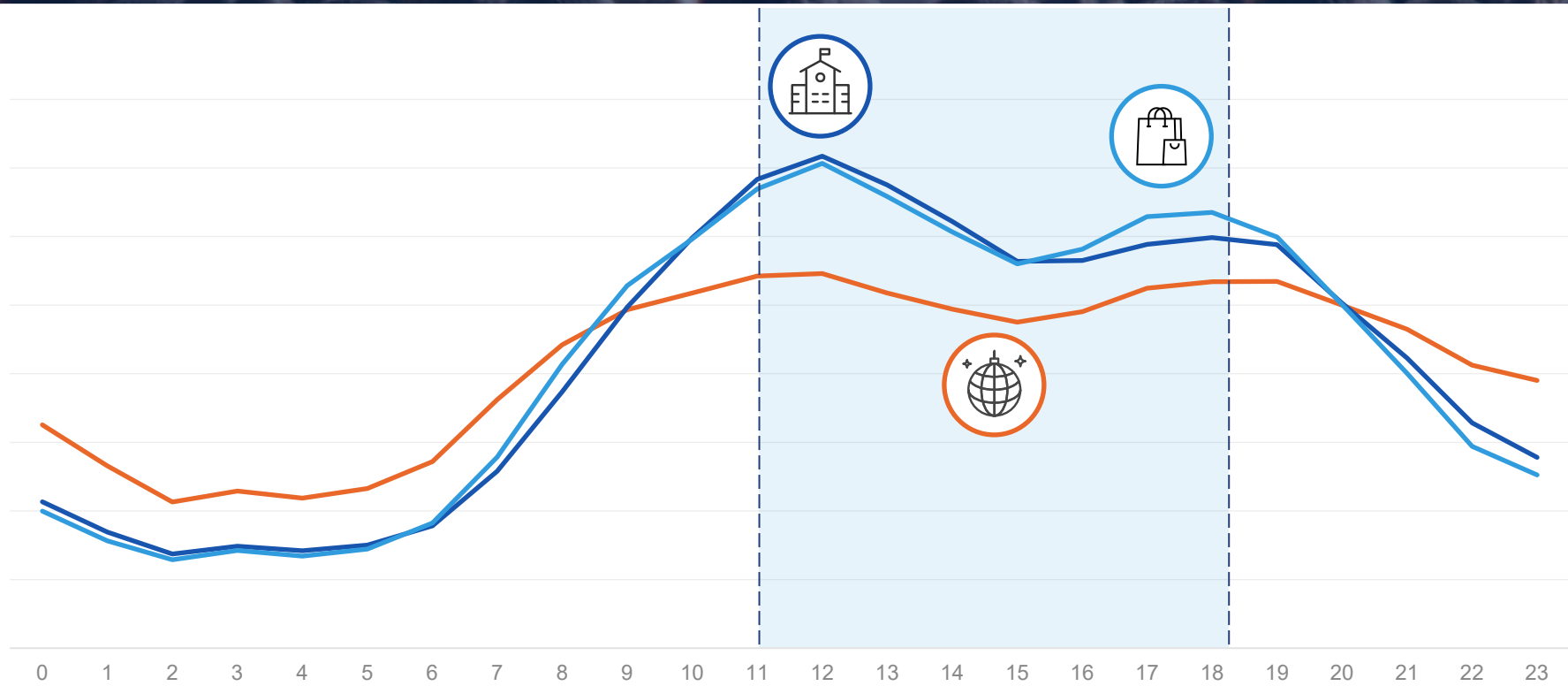


# The 3 most visited neighbourhoods by international visitors remain the same all year long

Top 10 most visited Neighbourhoods by international visitors by month



# Each neighbourhood has its own daily rhythm





Step 2

# Identify the visitors most likely to generate overconcentration



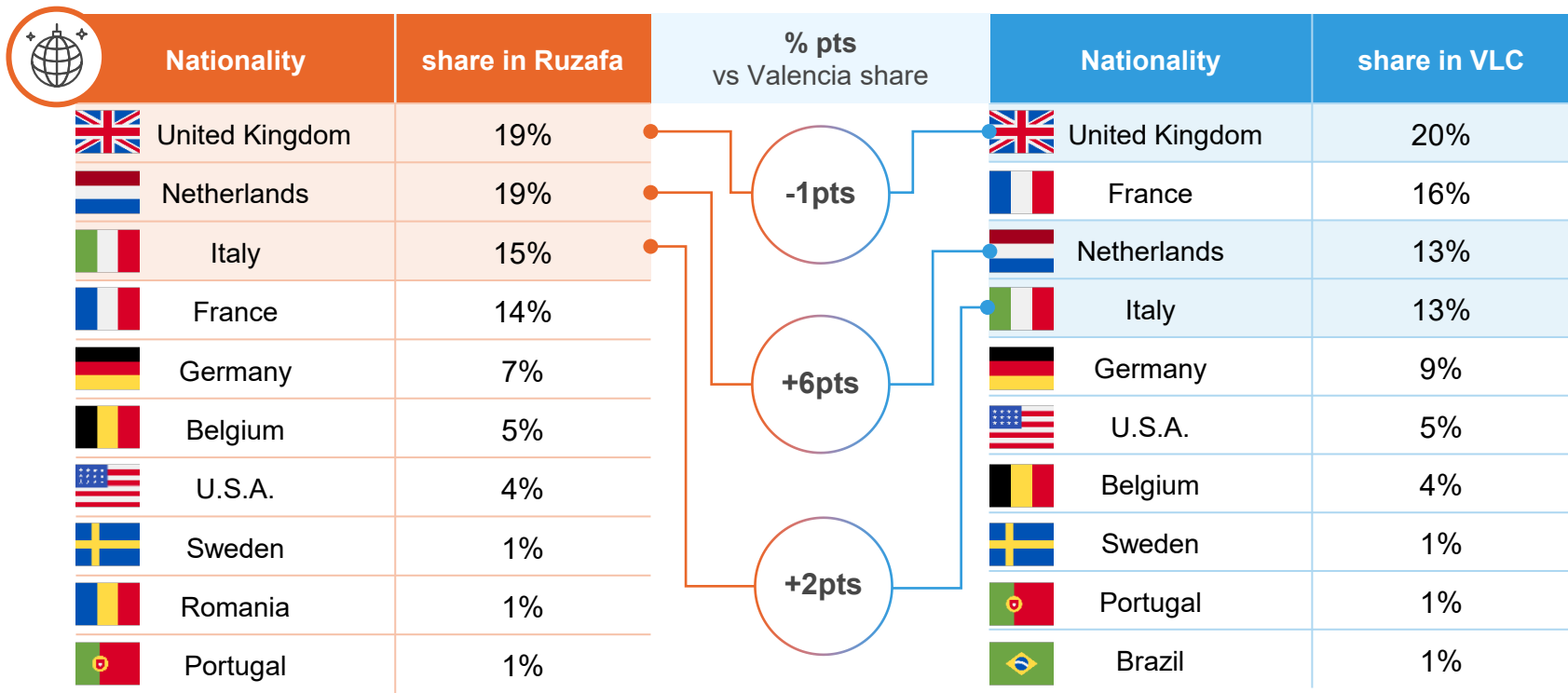
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# The nightlife area appeals more to some nationalities than others























Step 3

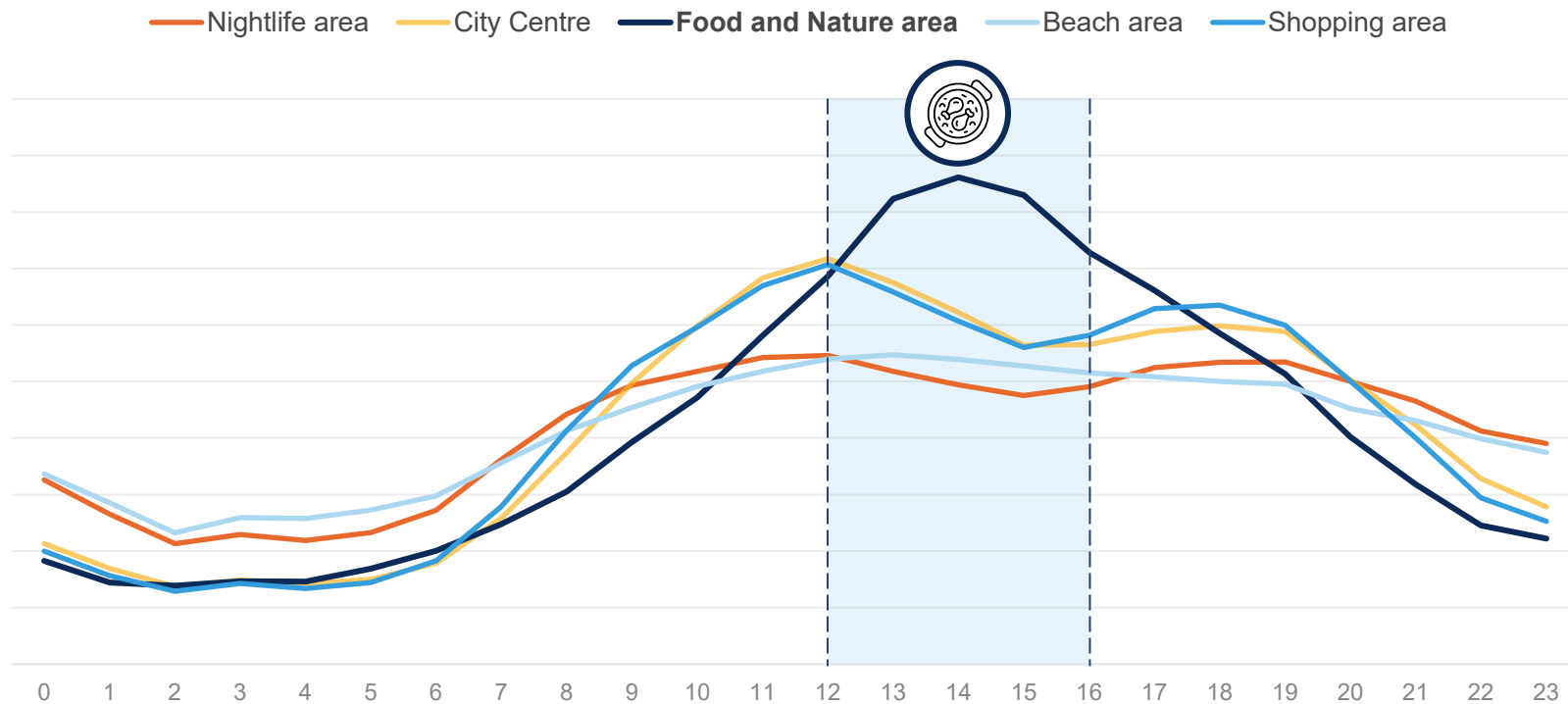
# Identify the visitor profiles more likely to wander off the beaten track

# The French, the Dutch and the Belgians are prime targets for the food and nature area



Nationality		share in the food and nature area	% pts vs Valencia share	Nationality		share in VLC
	FR	24%	+8pts		GB	20%
	NL	18%			FR	16%
	GB	15%			NL	13%
	IT	10%	+5pts		IT	113%
	DE	8%			DE	9%
	BE	6%	+2pts		US	5%
	US	3%			BE	4%
	SE	2%			SE	1%
	PT	1%			PT	1%
	BR	1%			BR	1%

# The Food and Nature area faces extreme concentration during lunchtime

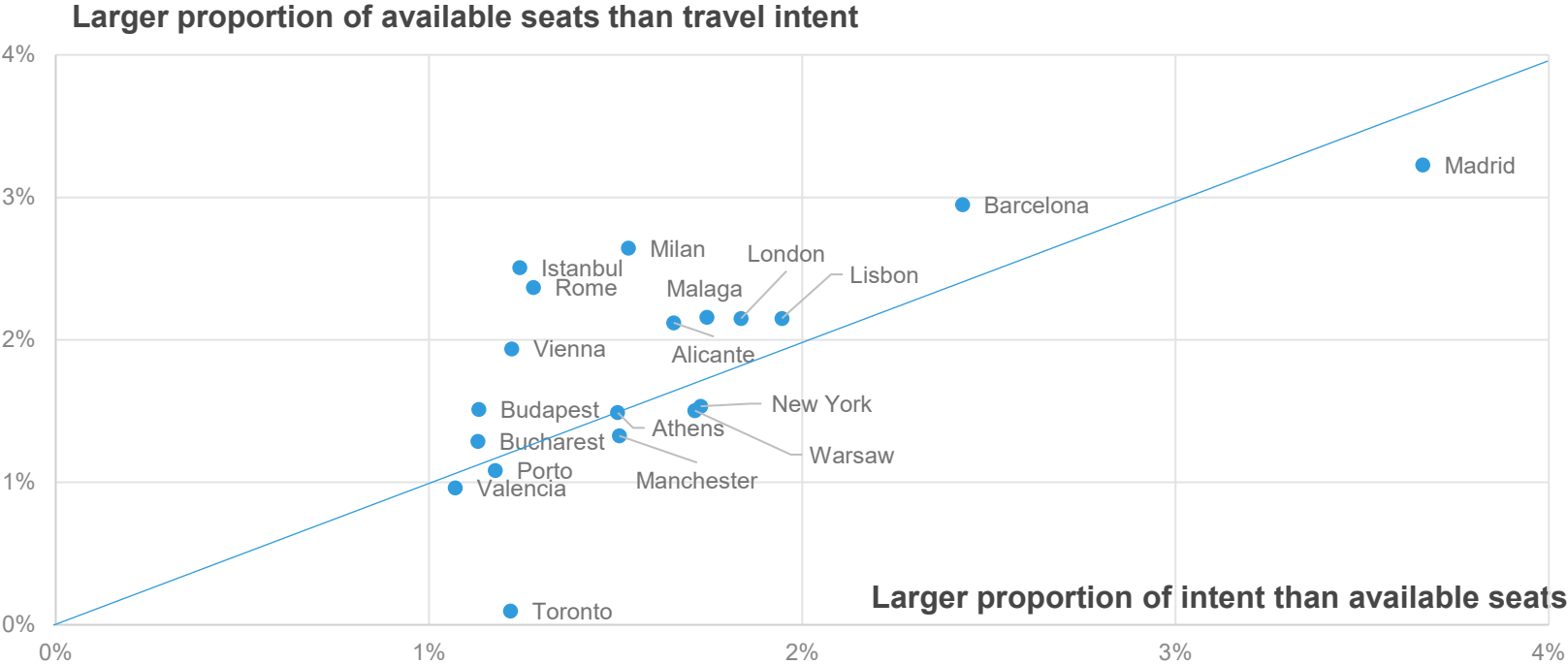




# Flattening the seasonality line

# Understand your market: Underserved Routes

Available seats on direct flights and searches made for travel in 2024 for international arrivals to Brussels





# Take-Aways

1

# TOURISM IS SET TO TO GROW

2

# A DIFFERENTIATED APPROACH IS REQUIRED DURING HIGH AND LOW SEASONS

3

**DATA IS KEY**

# THANK YOU!

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