

1-2 October 2025

# Baltic Sea Tourism Forum 2025

Regenerative and Data-Based Tourism



The public task entitled “Baltic Sea Tourism Forum 2025 – an international forum for cooperation on regenerative tourism and digital innovation” has been co-financed by the Ministry of Sport and Tourism, pursuant to agreement no. 2025/0055/0106/UDOT/DT/BP/IC.



Data-driven decision-making in  
destinations:

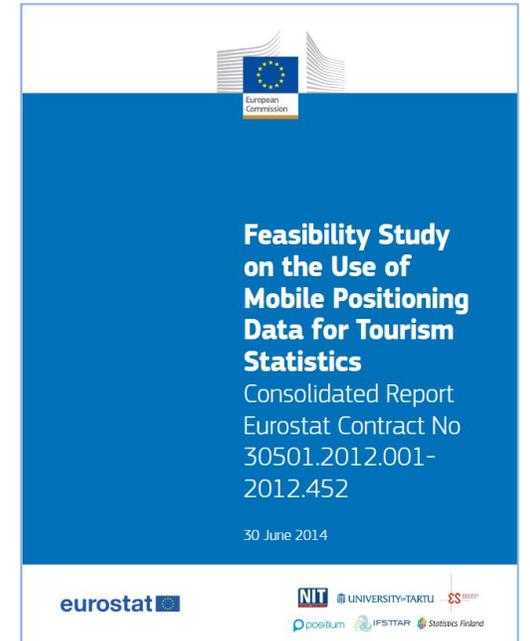
Data only helps if you know how to use it

Baltic Sea Tourism Forum  
Gdansk, 2 October, 2025  
Ulf Sonntag, NIT

# About me ...

... Working with and selling data for 20+ years for destinations and industry

- Reisenalyse / Market studies
- How to measure tourism (e.g. Eurostat Mobile Phone Study)
- How to work with data (e.g. D3HUB)



You can only manage  
What you can measure

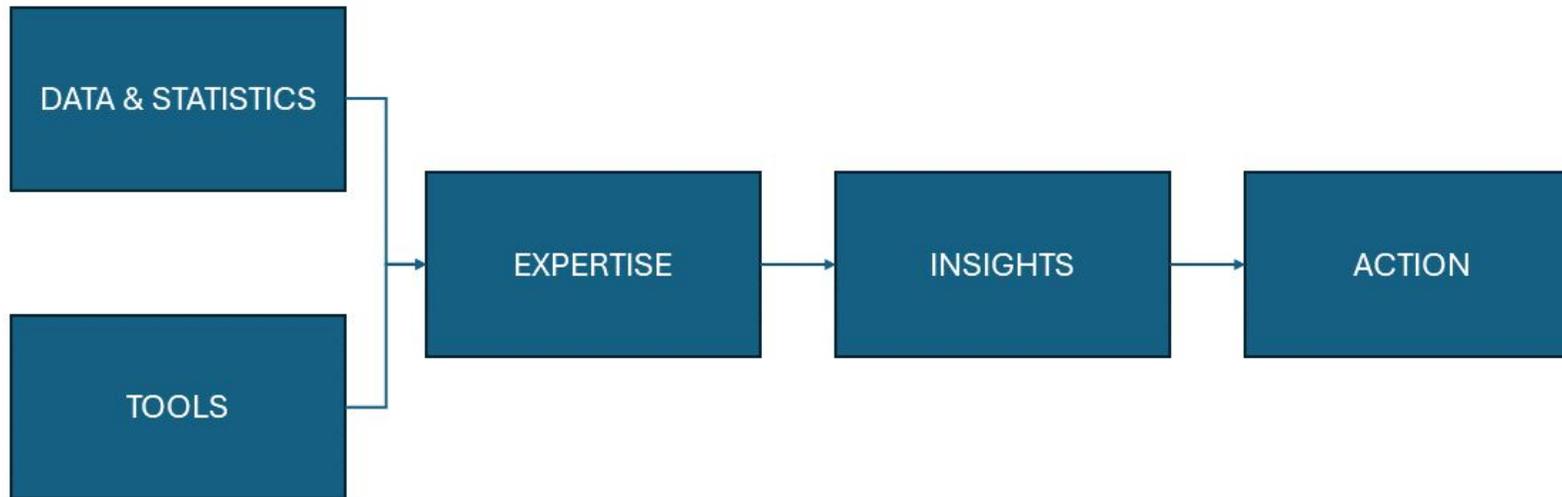
You can only manage  
What you can **measure**

## My observations in the last 20+ years ...

- We tend to “over-measure” (= producing data) but “under-utilize” (= using data)
- We are quite good at collecting, storing, analysing – and we are getting better and better at visualizing
- But we are only seldom good at contextualizing and concluding.
  
- So, does data today really help us to take better decisions in destinations?



## Most of the data-interested DMOs express need for support to bring data into action



- **19 % of DMOs need very much support** (item 5) in **all** of the five steps
- **41 % of DMOs need much support** (item 4 or 5) in **all** of the five steps
- **70 % of DMOs need at least moderate support** (item 3, 4 or 5) in **all** of the five steps

1 – need no support ... 5 – need very much support

Question D1: “How much support does your organisation need in each of the steps in the process?” Please rate for each aspect from 1 = need no support to 5 = need very much support. You can use the values in between to grade your opinion. Source: D3HUB Stakeholder Survey 2024. DMO n = 127, all respondents,



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## So, what now with the data-driven decision making ...

Do we need **data** to make better decisions?

Do we need **context** to make better decisions?

- Data might help to you to understand the context but they are never a means for themselves.
- Data-driven decision making is something good – but it means looking for context not for numbers as such
- Data is not only numbers, but all information that helps you understand the context.
- Data as such has no value, it only becomes valuable when it's interpreted, contextualized, and understood.



**DATA**



**CONTEXT**

You can only manage  
What you can **understand**

## What does this mean for destinations?

Data does not take decisions and data does not solve problems, but if you are smart, data can help you with your decisions

- You need smart questions first and good data second
  
- Smart DMO managers
- Motivated, dedicated, knowledgeable staff in charge of insights
- Solid financing
- Clear strategy
- Continuity
  
- Without all of these it is not even worthwhile starting to think about smart data-driven decision making or spending even money to buy data

# You need smart questions first and good data second!

- What do we want to know?
- What decisions are at stake?
- What kind of data do we need?



Each destination needs to build its own data ecosystem (= a puzzle) of data and data tools, fitting with ...

... strategy

... needs

... resources

... competencies

# What kind of data is really helpful ...



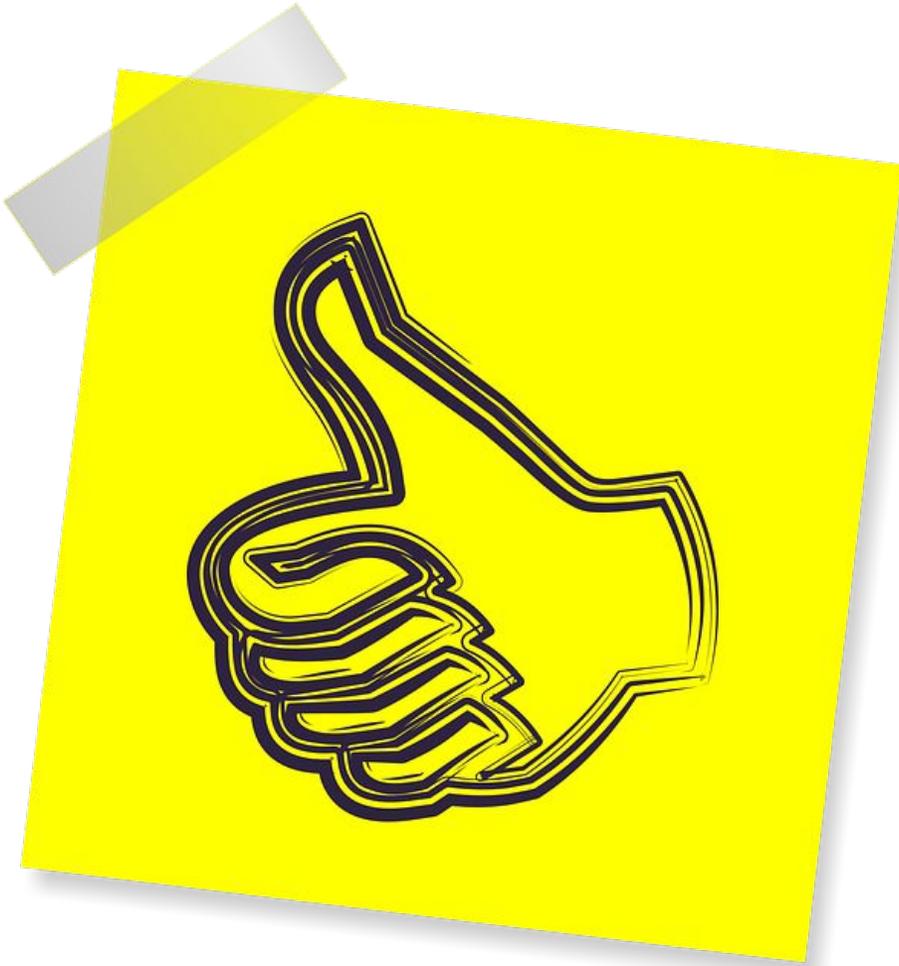
1. Official statistics
  2. Guest-Surveys
  3. Market-Studies
  4. Resident-Surveys
- Develop a system and stick with it!

## What you should NOT do ...



- ❑ Expect the data to do your job
- ❑ Change your baseline data sources
- ❑ Follow every hype
- ❑ Believe the data salesmen
- ❑ Try to find the “egg-laying wool-milk-sow“ (one solution for everything)
- ❑ Believe to be smarter than others
- ❑ Try to reinvent the wheel
- ❑ Be too ambitious
- ❑ Keep your knowledge to yourself

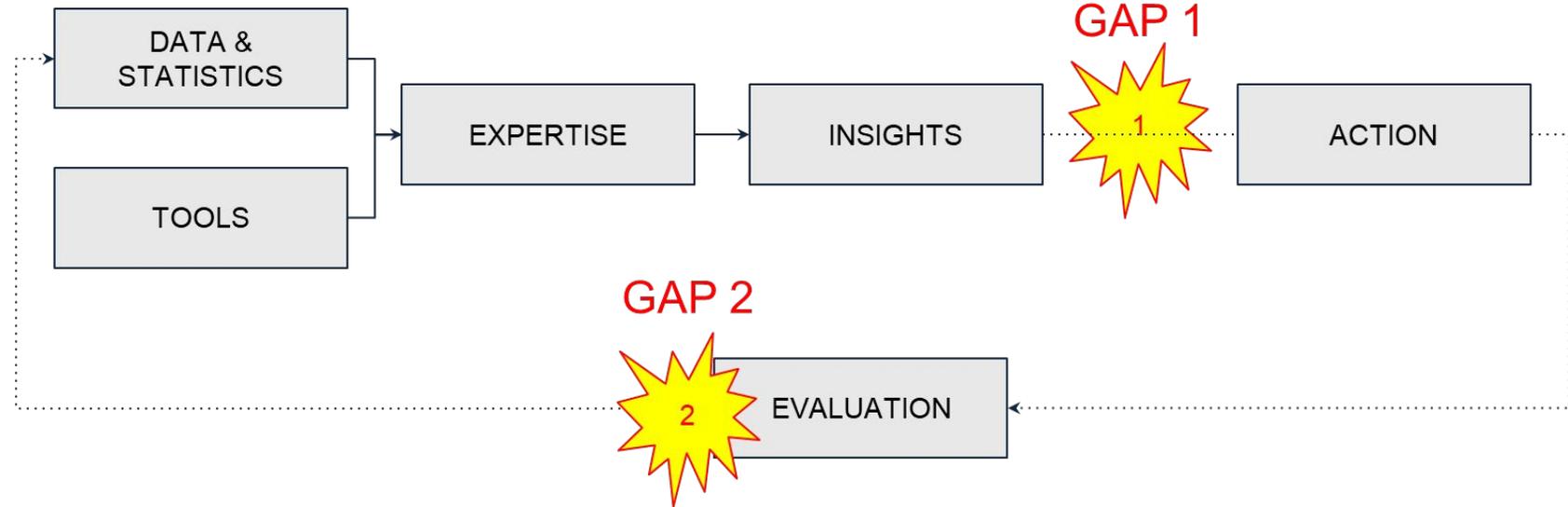
# What you should do ...



- Long-term planning, consistent with strategy
- Cooperate
- Peer-to-peer learning
- Pooling of resources
- Sharing of data
- Sharing of knowledge
- Be realistic/humble what the data can do, and what you have to do yourself



This is what D3HUB is supposed to help you with ...



## Gap 1: Between measurement and action.

Typical question: “How to turn data into action?”

Typically, the barrier to plan and implement interventions is not a lack of data, but a lack of power.

**It is a common misconception that data tell us what to do. There is no “magical machine” where you put data in and get a strategy out.**

## Gap 2: Evaluation.

Typical question: “Was my intervention successful?”

Typically, there is no evaluation at all.

**But the concepts of evaluation, interventions and (field) experiments are there, we just have to use them.**

With the current level of expertise, DMOs will struggle to participate appropriately in

- using data to make tourism more sustainable
- absorbing the business opportunities coming from European Data Spaces

... let alone taking an active role





Creation of a Competence Centre to support data management in tourism destinations

VISIT | skåne

## OBJECTIVES

The main objective of D3HUB is to design, test, pave the way and maintain a self-sustainable European Competence Centre to support tourism destinations and their ecosystem (with special focus on SMEs) in their data-driven green and digital transition, as well as to increase collaboration and knowledge transfer between tourism stakeholders and tourism destinations.

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Build a knowledge support scheme to assist tourism destinations across the European Union

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Provide tailor-made digital solutions and data for DMOs and tourism SMEs.

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Test the already developed framework through a pilot run by a critical mass of DMOs.

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Integrate results and learnings into a business plan to set up and sustain the Centre.

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Upscale beyond the partnership and build a data-driven tourism community.

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Implement the Centre and ensure its continuity.



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Feedback loop

- Facilitate that DMO's and SME's requirements are taken into account.
- Deploy initiatives and help to achieve adoption.

### EU POLICIES FOR TOURISM

Digital Age	Data Strategy and Act	Transition Pathway for Tourism & EU Tourism Agenda 2030	Industrial Strategy	Green Deal	[...]
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### TOURISM DATA-DRIVEN INITIATIVES AND ENTITIES

Data Space for Tourism	EUROSTAT and other National Statistic Offices	European Dataspaces related with Tourism [Mobility, Agrofood,...]	Other initiatives: GAIA-X, DIH, SMART DESTINATIONS	[...]
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### D3HUB (Data-Driven Destinations Hub)

**Objectives**

Support data management and business intelligence	Enable data-driven marketing & management	Foster knowledge transfer through European cooperation
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**Service Portfolio**  
*(to be defined in the project)*

Consultancy	Community Building	Capacity Building	Data Analysis & sharing projects	Core indicators and Monitor system	[...]
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### EUROPEAN TOURISM ECOSYSTEM

DMOs	Public Authorities	SMEs	Travel Tech	Value Chain	Associations and Federations	[...]
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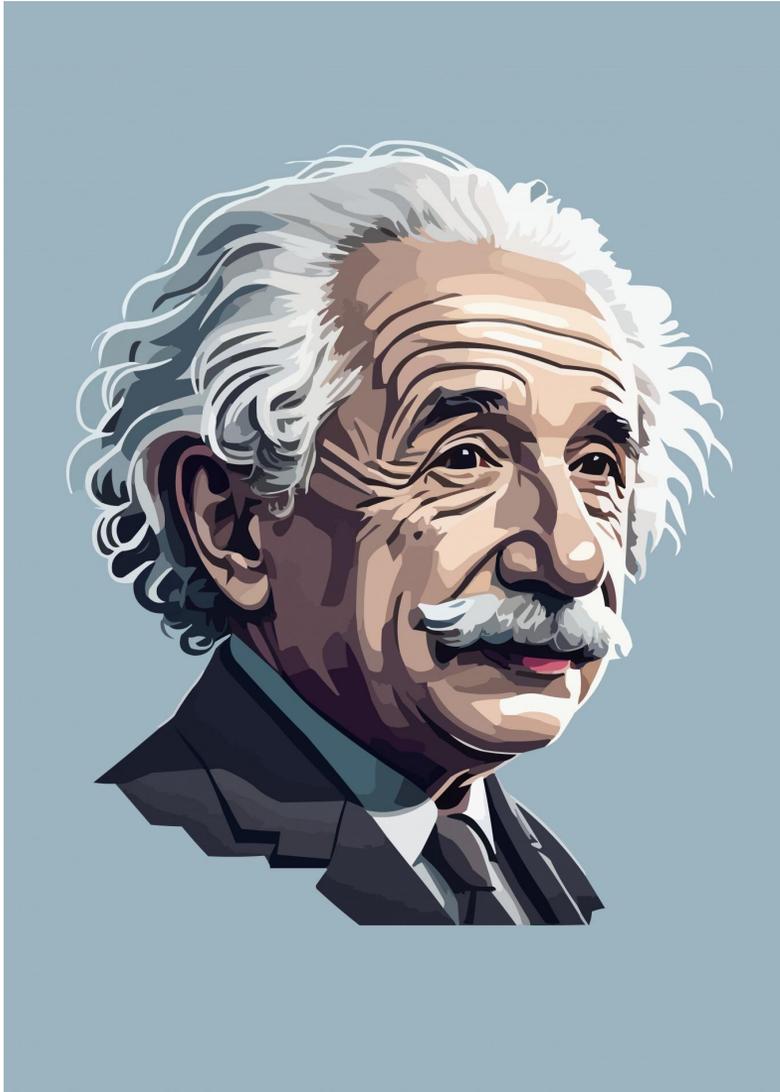
- Strategic advice to policy makers based on field projects' evidence.
- From data to data-driven management.
- Monitor adoption and other core indicators

Feedback loop



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# Conclusion



- Data does not solve problems, people do
- Invest first in brains, only then in data!

With D3HUB and the CC we aim to connect the smart data persons in the DMOs and help them to become even smarter

# Thank you very much!



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