

Tourism and mobility flow analysis at the MWC 2025

MWC 2025 | March 3 - 6, 2025

01. Context	03
How was the Mobile World Congress 2025?	
02. MWC week data	05
Visitor mobility trends between March 3 and 6	
03. Data from the first day at the MWC	13
Trends identified on Monday, March 3rd	
04. Data from the previous week to the MWC	20
Trends identified during the previous week to the event	
05. Benefits provided by Smart Steps	29
How can this solution help in the analysis of crowd mobility	

Context

How was the Mobile World Congress 2025?

01

Context

ANALYSIS OF TOURIST FLOWS AND MOBILITY AT THE **MWC25**

Mobile World Congress (MWC) is one of the world's most important events in the field of mobile technology, connectivity, and digital technologies. The 2025 edition was held from March 3 to 6 at the Fira Barcelona Gran Vía.

Every year the MWC attracts thousands of visitors from all over the world, generating interesting dynamics in terms of mobility and tourism. We have analyzed the influx and behavior of visitors to this international fair using our Smart Steps platform for crowd mobility analysis.





MWC week data

Visitor mobility trends between March 3 and 6



VISITORS

A 14% increase in the number of visitors to the fair compared to last year. Lower compared to the 2024 edition, but the number of attendees at Mobile World Congress (MWC) continues to increase.

The **second day** remains the highest attended day, with 15% more attendees than in 2024. Although participation decreases on the **third day**, in 2025 it still remains high with a 26.5% reduction compared to the highest attendance day.

Increase in the average length of stay of MWC attendees. International visitors stay 4 days on average, with a very different behavior according to nationality. National visitors stay for fewer days in the region.

France, China, and the United Kingdom are the countries with the highest number of visitors to the Fira Barcelona.

We highlight the **43% increase** in the number of **Chinese attendees** compared to 2024. **Germany disappears from the top 3**, decreasing by 8.2% compared to last year, but remains in the top 5 of the **190 nationalities** that have been seen during the event. **Poland** is well represented.

+14% compared to 2024

MOBILITY

Little variation in mobility to Fira Barcelona compared to 2024. Very similar behavior with a large increase in trips on the first day of the event, **twice as many as on a daily day**.

36% of the trips to the Fira Barcelona during the MWC take place in the **early morning**, coming from the city center, and 7% from the Sants station, mostly national/regional arriving by train.

As the event progresses, the number of people traveling to the Fira in the morning and from nearby neighborhoods such **as La Marina de Port or Sant Antoni**, very popular for **overnight** stays, is increasing.

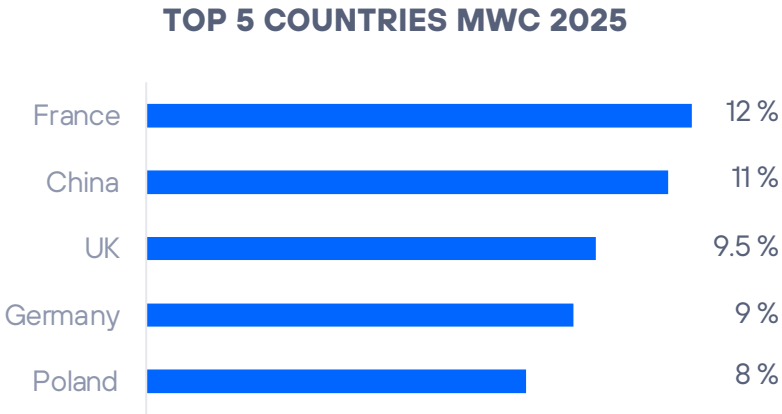
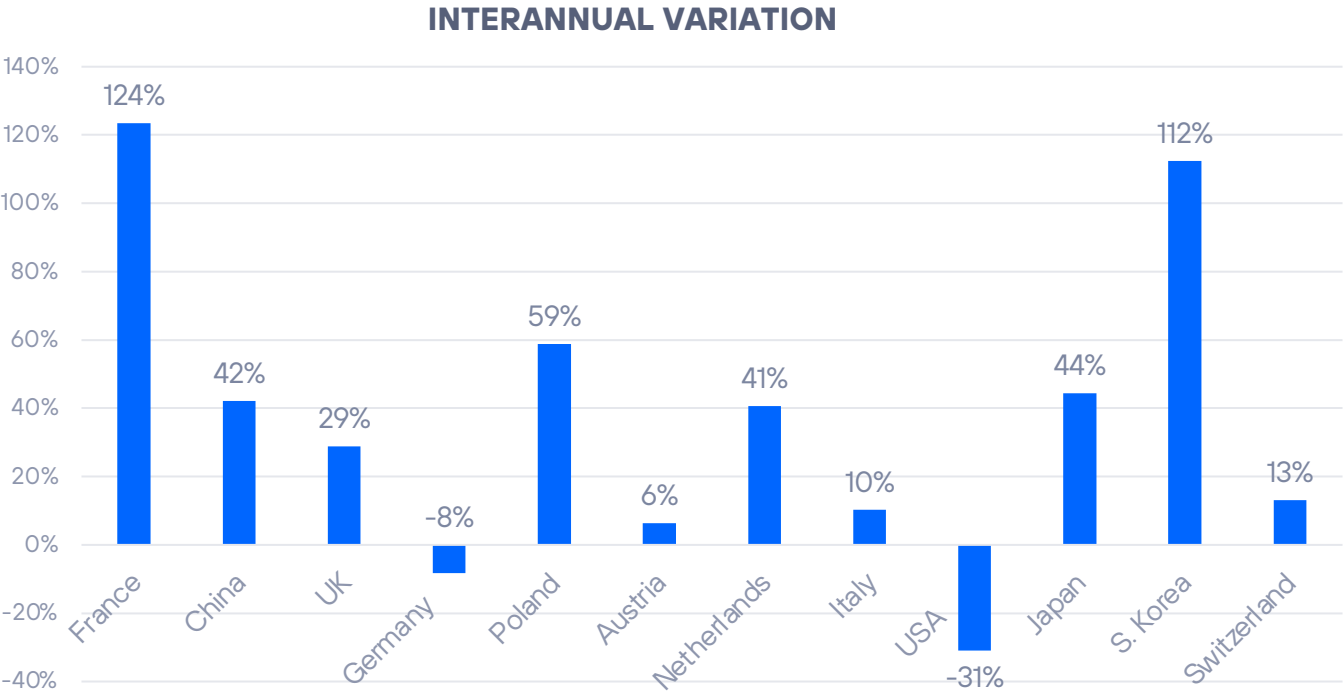
10% increase in mobility to downtown areas by 2025 after the event.

Change of behavior in the mobility of the site during the first two days. The number of visitors normally peaked in the afternoon after lunchtime. However, this year there was no such peak, instead, most visitors (48%) decided to leave the fair between 4:00 pm and 8:00 pm. On Wednesday and Thursday, the tendency was to leave at lunchtime and return afterwards.

+2% compared to 2024

Percentage change by nationality compared to 2024

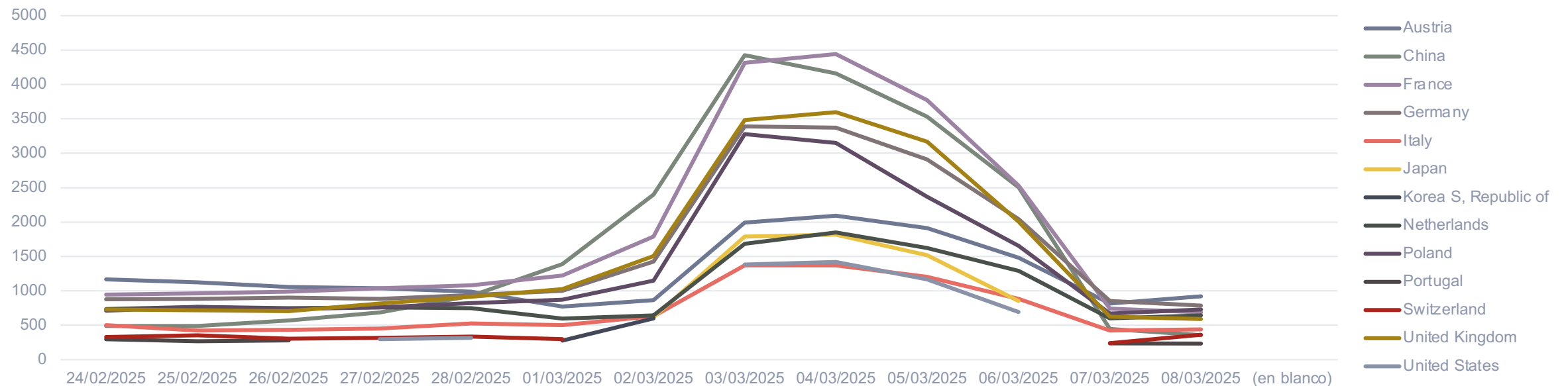
- This year there is an increase in visitors from China and a decrease in visitors from Germany.
- The United States visits also decreased this year. And there is a significant increase from countries such as Korea and Japan, although to a lesser extent and in both cases with little representation.
- France is a country with a strong presence at MWC, also due to its proximity to the location..



International visitors per day analysis

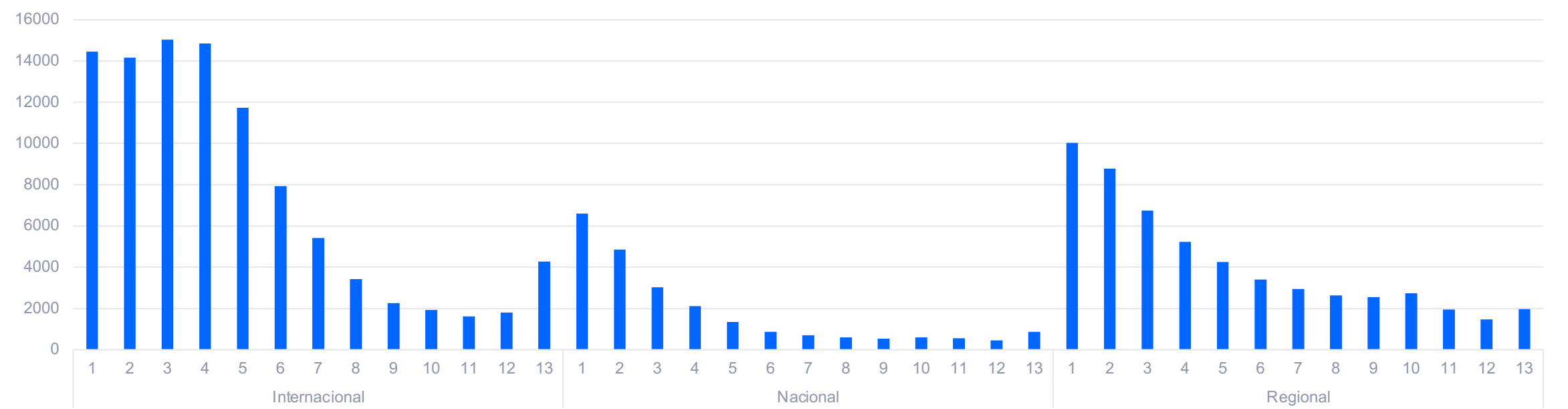
ANALYSIS OF TOURIST FLOWS AND MOBILITY AT THE **MWC25**

- The distance from the country seems to influence when different visitors arrive in Barcelona. Those coming from countries such as China, for example, tend to arrive the previous week, especially during the weekend.
- Visitors from the United Kingdom or France, in contrast, tend to arrive the day before or on the same day, with the second day being the busiest.
- Generally speaking, international visitors tend to leave the fair from Wednesday onwards. However, attendees from China or Poland start to leave after the first day of the event..



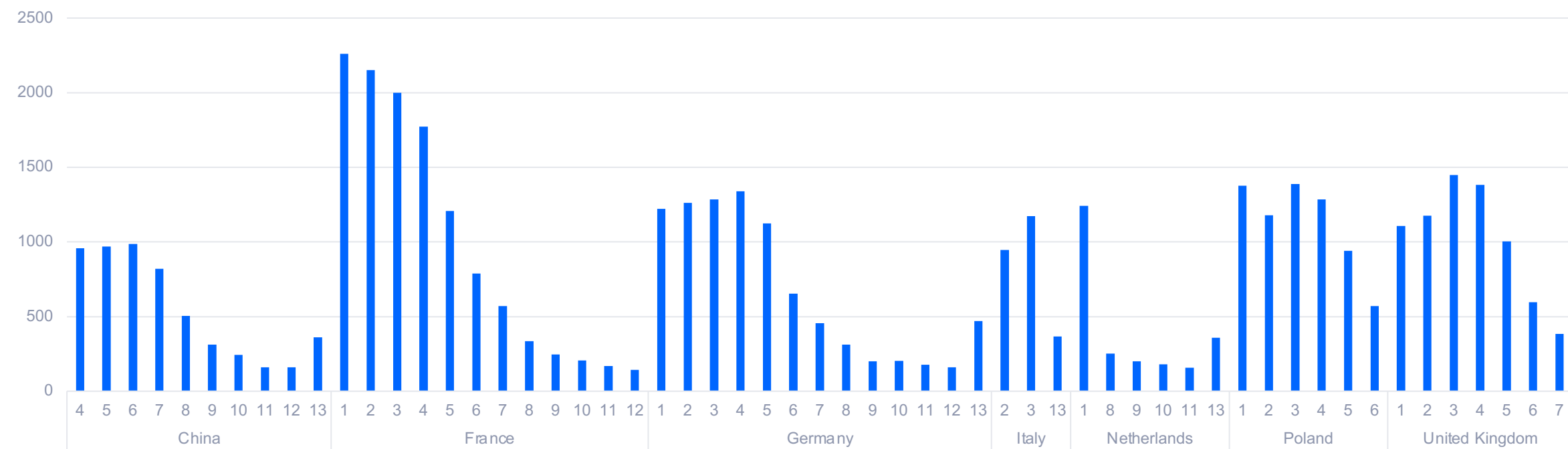
Number of days spent: Average according to the origin of the visitor

- Of those attending the event, most international visitors stay 3 or 4 days. They follow a very different behavior, as they choose both short and long stays.
- The vast majority of national and regional visitors stay one day.
- In 2025, longer stays are observed compared to 2024.



Number of days of spend: Average stay in the MWC by nationality

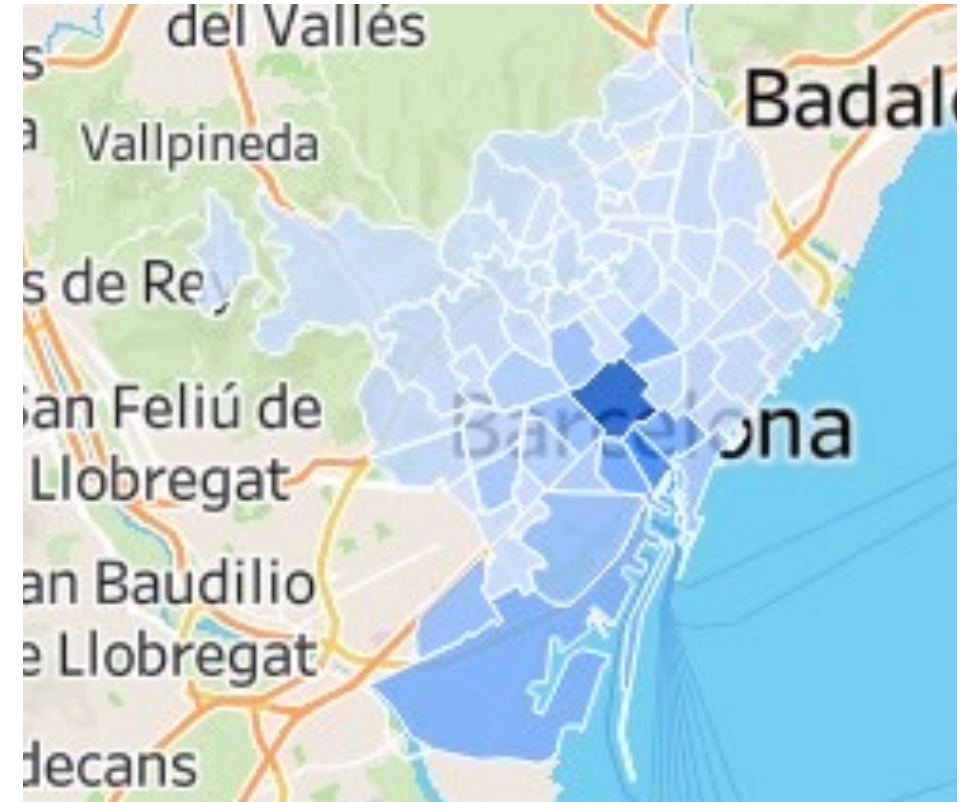
- Significantly different patterns are observed compared to 2024, when the majority of the event attendees stayed only one day. MWC attendees in 2025 show a tendency to stay more days.
- In the case of distant countries such as China, the minimum length of stay is four days.



Analysis: Most visited neighborhoods by international attendees during MWC 2025

ANALYSIS OF TOURIST FLOWS AND MOBILITY AT THE **MWC25**

- The **areas most visited** by **international visitors** during the previous week are concentrated in the vibrant neighborhoods of the city center, such as **Dreta de l'Eixample, El Raval, the Gothic Quarter, Sagrada Familia, Vila de Gracia**, together representing 35% of the total number of visitors. On the other hand, the **neighborhoods located in the vicinity of Fira Barcelona**, the area near the **airport** and **Sants** train station, contribute with 14%, increasing the presence in the surroundings of Fira Barcelona with respect to 2024.
- The dynamics experience a **significant change during the MWC week**, with a considerable increase in the presence of visitors to the Fira Barcelona, reaching 6% of the city's total. There is also an **increase in activity in the neighborhoods near the airport**, along with a 3% increase in the Sants station area. Despite these changes, the percentage of visitors in the center remains stable.
- In terms of **overnight** stays, the **central neighborhoods**, and especially those where **visitors spend more days**, become prominent destinations. On the other hand, those considered **short-stay visitors**, especially for events, choose to stay in the **neighborhoods surrounding the Fira**. The diversity in the choice of accommodation reflects the **variety of experiences** that Barcelona offers its visitors.



A blue sphere sits on a blue textured surface. In the background, the number '03' is visible in a large, white, sans-serif font.

Data from the first day at the MWC

Trends identified on Monday, March 3rd

Visitor preferences during the morning, afternoon, and evening

Most people tend to go to MWC in the morning, but not everyone goes first thing in the morning. In fact, the **peak of attendance** occurs **around noon**. Visitors **start to leave the fair at 4 pm and head towards the city center**. This is a **different behavior from previous years**, when a peak in attendance was also observed in the afternoon.

In the **afternoon**, the most visited area is the **Dreta de L'Eixample** (place of concentration of **tourist attractions** such as Casa Batlló, La Pedrera, as well as the main **shopping areas of the city**, Plaza Catalunya, Paseo de Gracia, ...), which attracts more interest among visitors than in 2024, with **25% of visitors** (10% more than last year).

It is followed by the **Marina de Port** with **6% of visitors, who return to their hotels, and Sants with 3%**, which also includes people who go to the **station** to take the **train** back.

After the cultural visits and shopping, it's time for **dinner**. **The number of areas visited increases**: in addition to **those already mentioned, Barri Gòtic, Poble-sec and Raval**, which account for 18% of mobility, are added.

And finally, the well-deserved rest. **13% of visitors stay in La Marina de Port**, a neighborhood very **close to the Fira**; **20% between the neighborhoods of Sants and Sant Antoni**, and **15% prefer to stay in the Eixample area**.

Mobility data on the first day of the MWC 2025

ANALYSIS OF TOURIST FLOWS AND MOBILITY AT THE **MWC25**



The behavior of previous editions is repeated: visitors arriving the weekend before the fair tend to stay mostly in the center, but those arriving directly on the days of the fair choose accommodation closer to the fairgrounds

This event brings together a wide diversity of nationalities. On this first day of the MWC, **attendees from 190 countries** have been registered, **with 12% of the international ones being Chinese**. This proves the wisdom of the decision to postpone the MWC 2025 so as not to take place at the same time as the Chinese New Year.

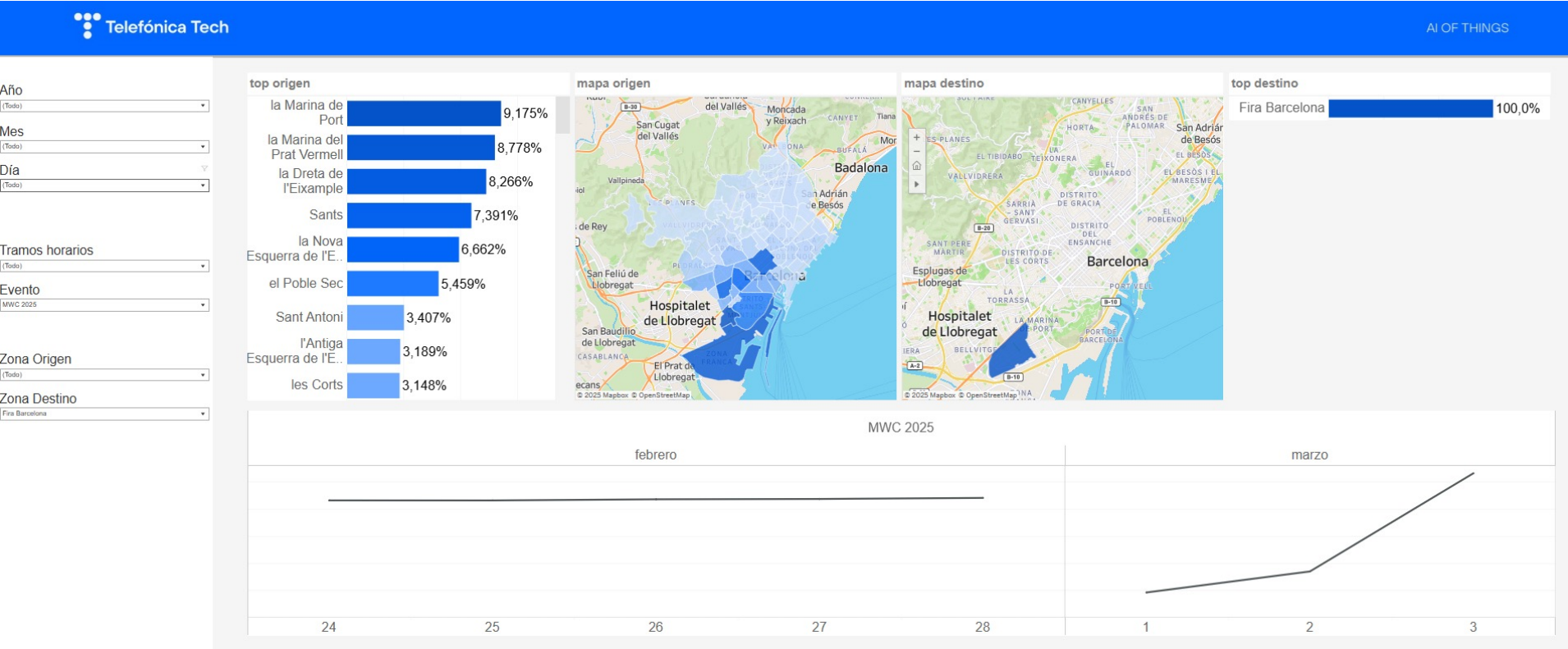
By country of origin, behind China come France, the United Kingdom,

Germany, and Poland, completing the Top 5 of international visitors.

The ranking varies from the first day of MWC 2024, where Germany topped the list with 12% of international attendees, followed by China (9.5%), the United Kingdom (which has remained stable), the United States and Poland, which also repeats its presence this year. France, with a 5% representation, did not appear in the Top 5 last year, however, this year it is in second place.

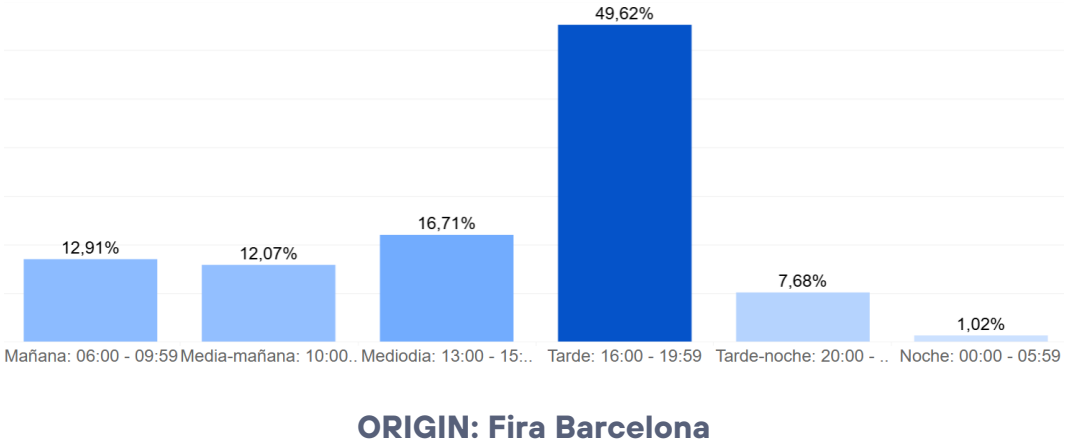
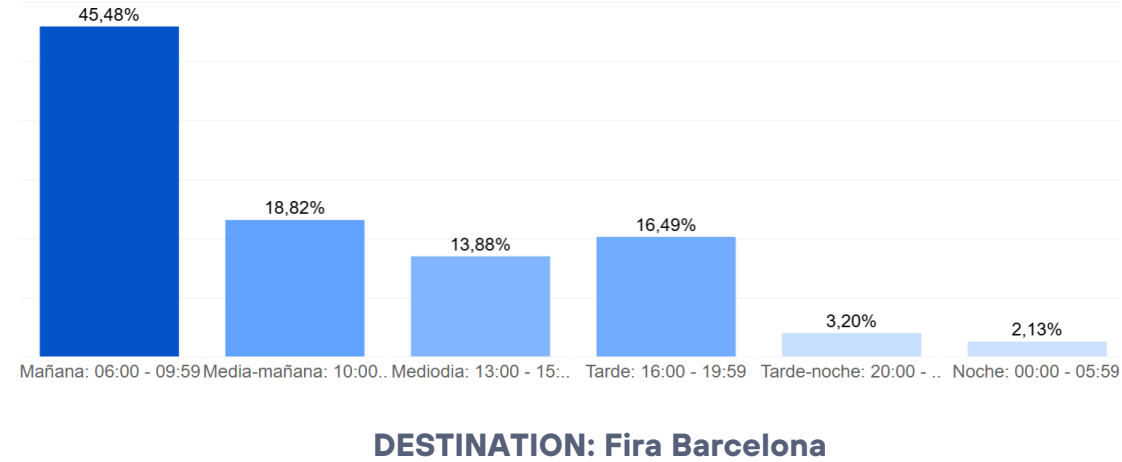
Mobility to Fira Barcelona

There is a clear increase in commuting to the Fira Barcelona on Monday, March 3, and mobility, especially from nearby neighborhoods and from Sants, where the station and the center are located.



Schedule sections to Fira Barcelona

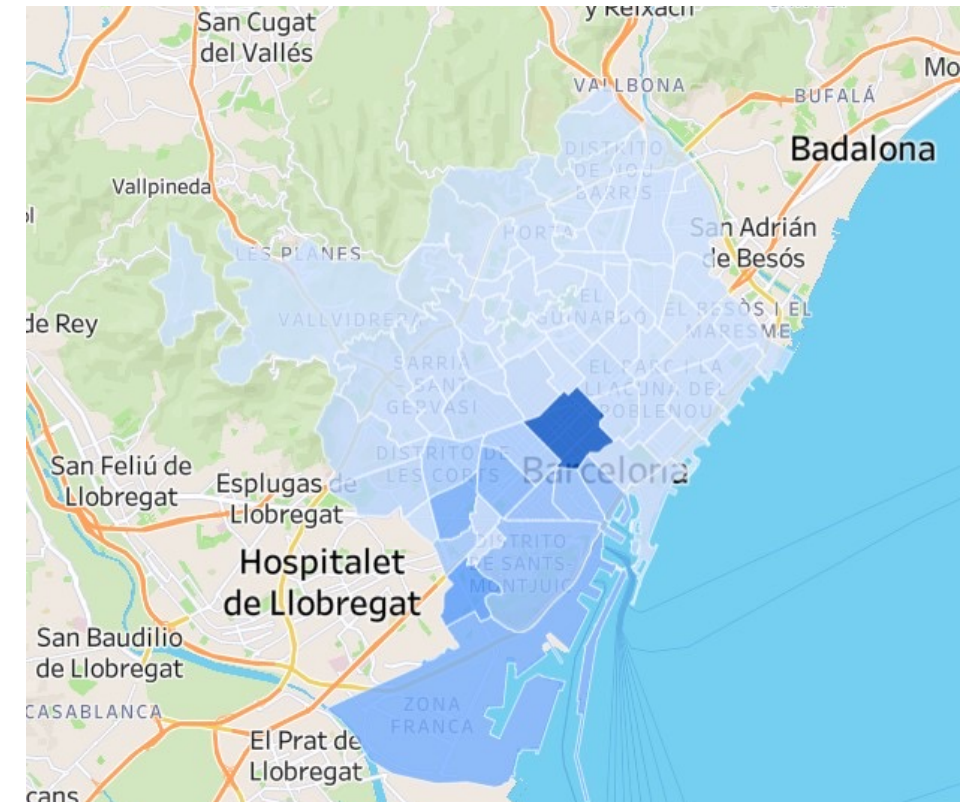
- The largest journeys to Fira Barcelona took place in the early morning: almost 46% of those occurring on the first day of the MWC.
- Few trips to the site in the afternoon. However, this is when most commuting occurs from the Fira to the rest of Barcelona's neighborhoods. Indicates that visitors spend most of the day at the MWC and begin to leave in the afternoon.
- Different behavior compared to 2024, where many visitors left the Fira Barcelona at noon (perhaps for lunch) and returned in the afternoon..



Most visited neighborhoods in the afternoon

ANALYSIS OF TOURIST FLOWS AND MOBILITY AT THE **MWC25**

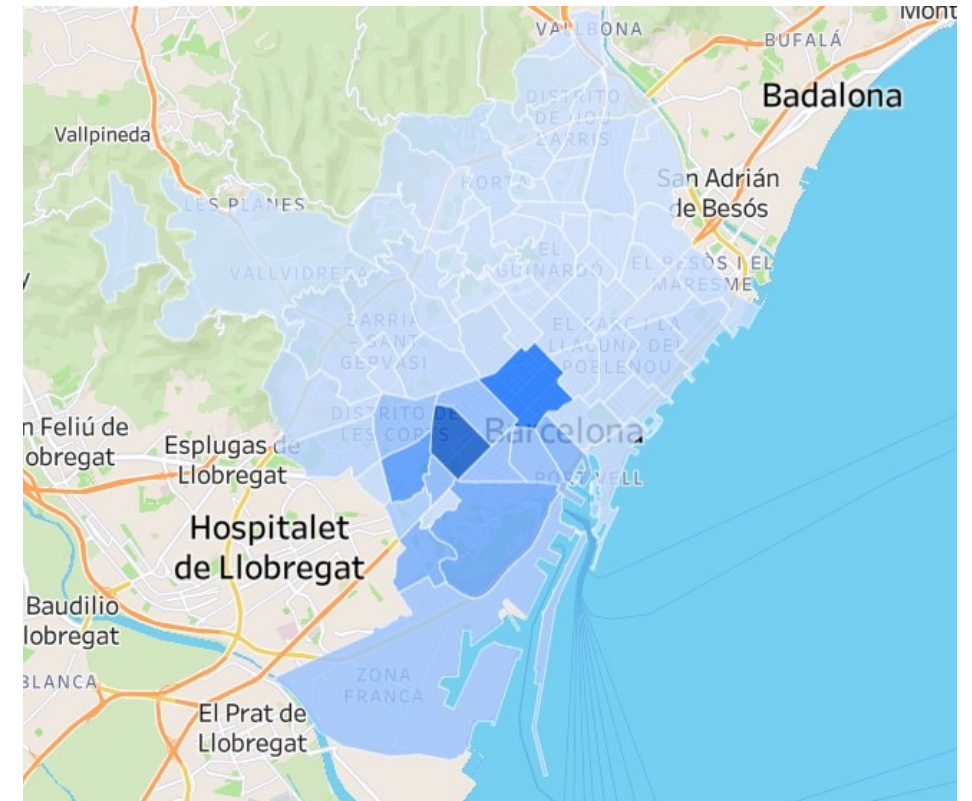
- **During the MWC the most visited area in the afternoon is Dreta de L'Eixample** (place of concentration of tourist attractions such as Casa Batlló, La Pedrera, as well as the main commercial areas of the city, Plaza Cataluña, Paseo de Gracia,...), representing approximately 25% of the journeys that take place from the Fira to the city center.



Overnight stays areas

- This year visitors to the MWC not only choose neighborhoods close to the Fira site to stay overnight, such as **Poble Sec** or **La Marina de Port**, but many of them prefer hotels in the most central neighborhoods of the city such as **Sant Antoni, Sants, L'Eixample** or **El Barri Gòtic**.

ANALYSIS OF TOURIST FLOWS AND MOBILITY AT THE **MWC25**



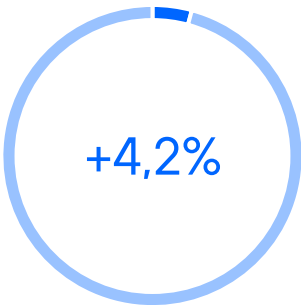
The background is a deep blue with a fine, grainy texture. In the upper center, there is a solid blue sphere. To the right of the sphere, the large white numbers '04' are displayed in a clean, sans-serif font. On the left side, white text is arranged in two lines.

Data from the previous week to the MWC

Trends identified during the previous week to the event

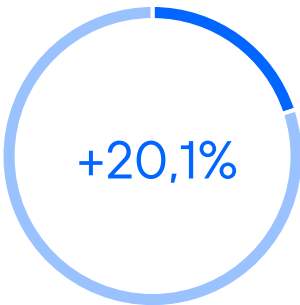
Evolution of visitor flows

Most relevant conclusions recorded during the week of February 24 to March 2 (prior to the MWC), contextualized with the data of the same week of 2024.



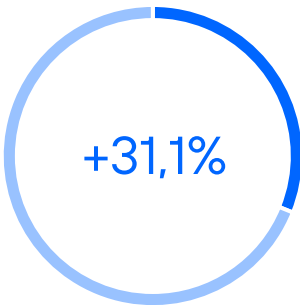
**VISITOR VOLUMEN
BARCELONA**

There is no significant increase in the number of visitors at the municipal level due to the event. These are figures for a normal week, slightly above 2024.



VISITOR VOLUME FIRA

The presence of visitors at the Fira Barcelona in the days leading up to the MWC continues to rise this year, with 20.14% more visitors than in 2024.



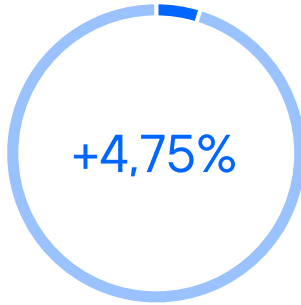
VISITORS BY ORIGIN

International visitors make up a large representation this week, almost 42%. This year there is a 31% increase in the number of Barcelona residents.



**OVERNIGHT
STAYS BALANCE**

Very similar behavior to 2024, with international visitors staying the longest and nationals the shortest. Longer stays by nationals increase by 3%.

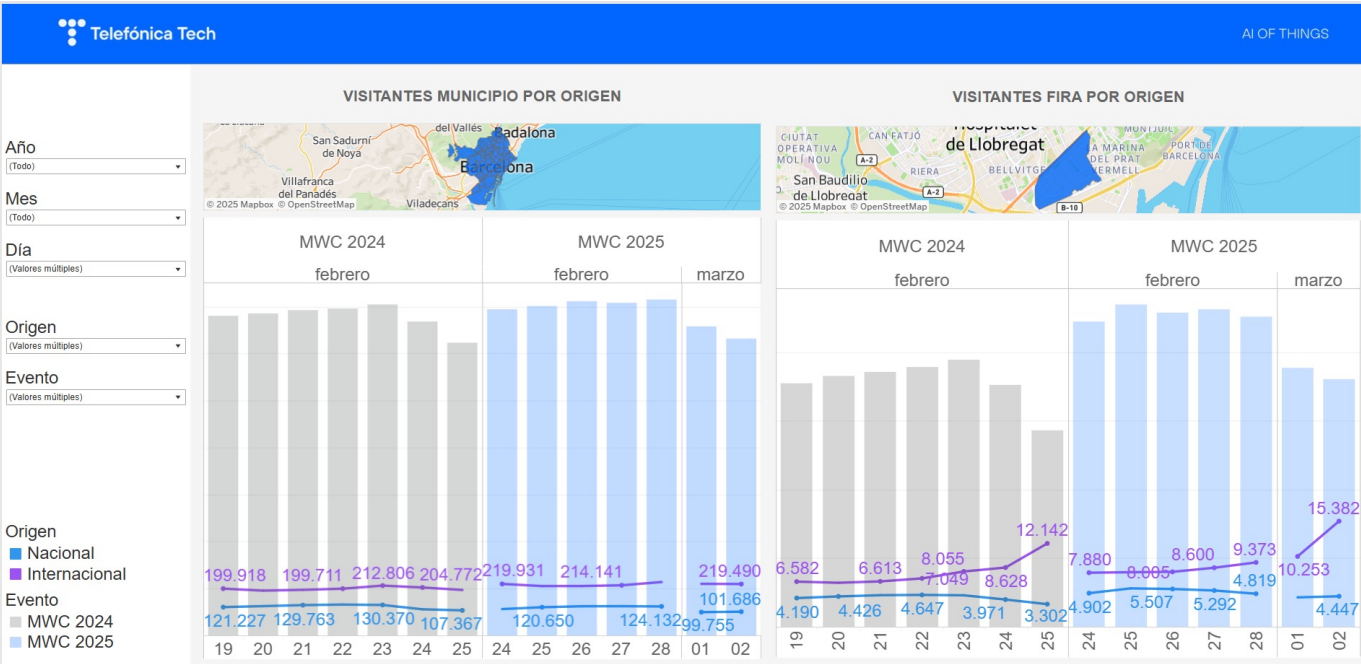


MOBILITY

Travel behavior to the Fira Barcelona very similar to previous years, with a pattern of work in morning and afternoon hours, and with an increase on Sunday, the day before the start of the MWC.

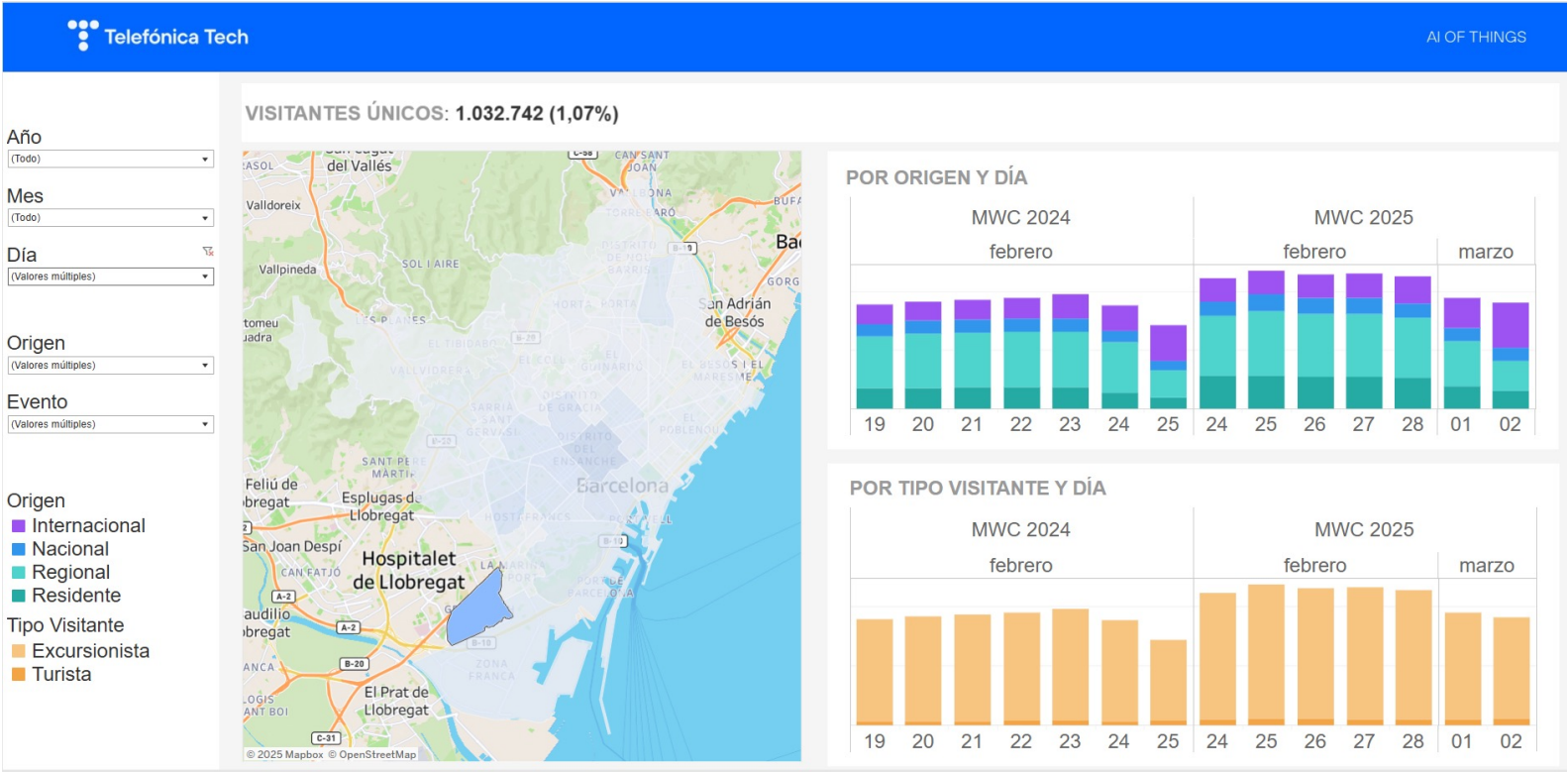
Single visitors per day per municipality vs Fira Barcelona

- Very similar to last year's performance. However, at the Fira Barcelona exhibition center, there was an increase in the number of visitors compared to 2024.
- There is a significant increase in the number of international visitors as the event approaches. However, this year there is also an increase in the presence of national visitors, a different pattern from previous years. This could indicate a greater presence of nationals this year who are coming to the venue to prepare for the event.

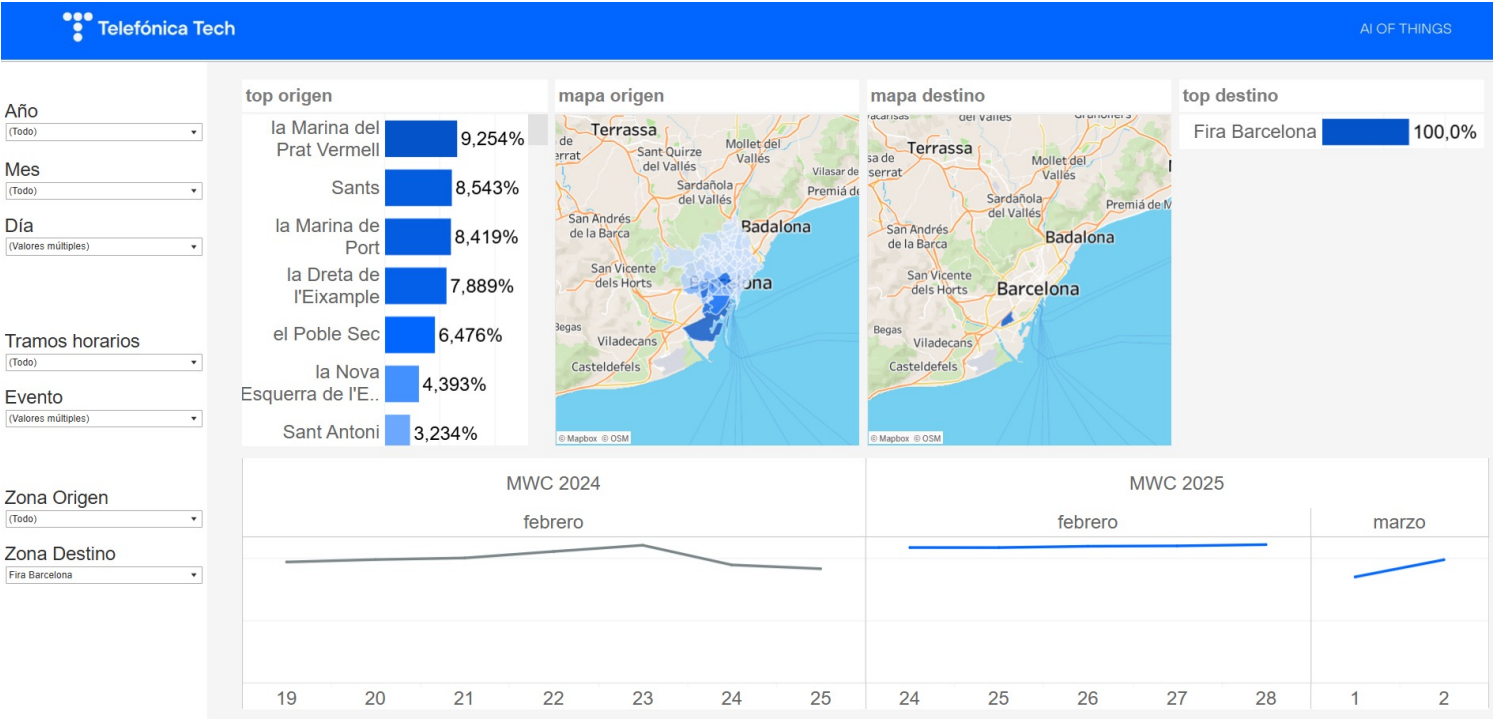


Single visitors at the Fira of Barcelona

Here we can compare the week prior to the MWC of both years at the Fira Barcelona by type of visitor and origin. There is less presence of tourists (dark orange color) and more presence of international visitors (violet color) as the starting date of the event approaches.



- A pattern of labor mobility is observed in commuting to the Fira Barcelona: it decreases on weekends, while the morning and afternoon periods are the busiest.
- However, on the Sunday prior to the start of the event, mobility to the Fira Barcelona increases.



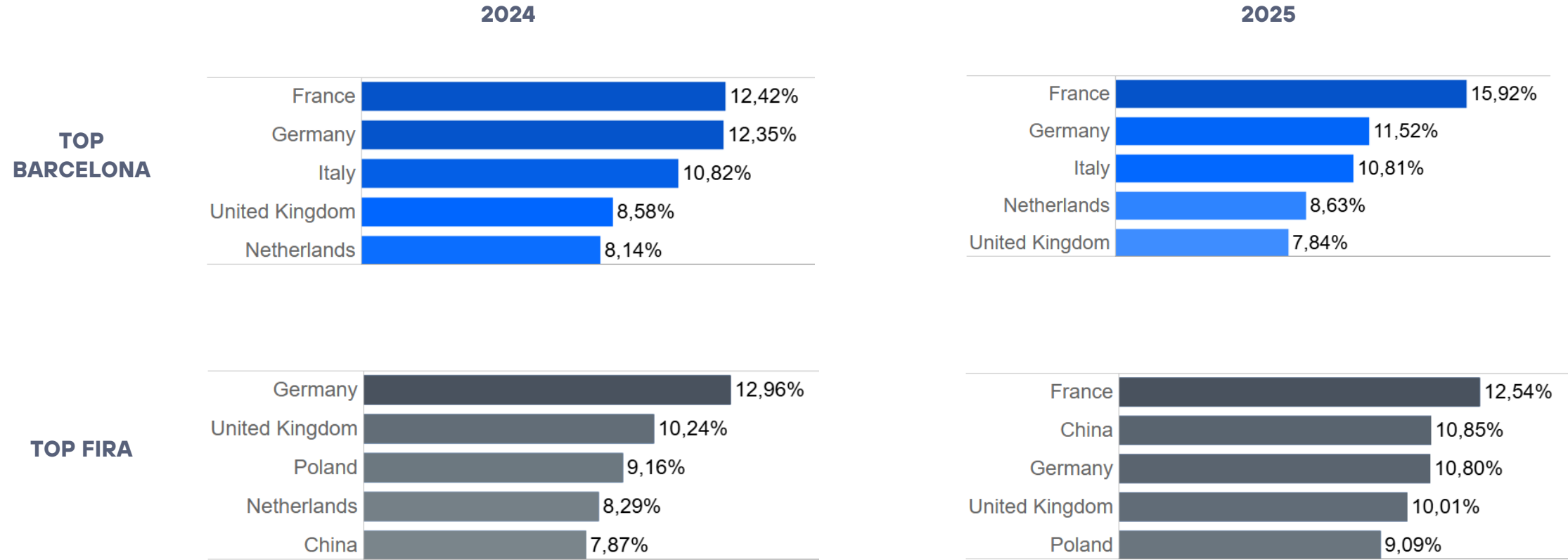
TOP International origin countries at Fira the Barcelona in the previous week to the MWC 2025

ANALYSIS OF TOURIST FLOWS AND MOBILITY AT THE **MWC25**



TOP international origin countries in the previous week to the MWC 2025

In the previous days to MWC 2025, the presence of visitors from China and Poland stands out. They do not come for tourism, but to attend the MWC.



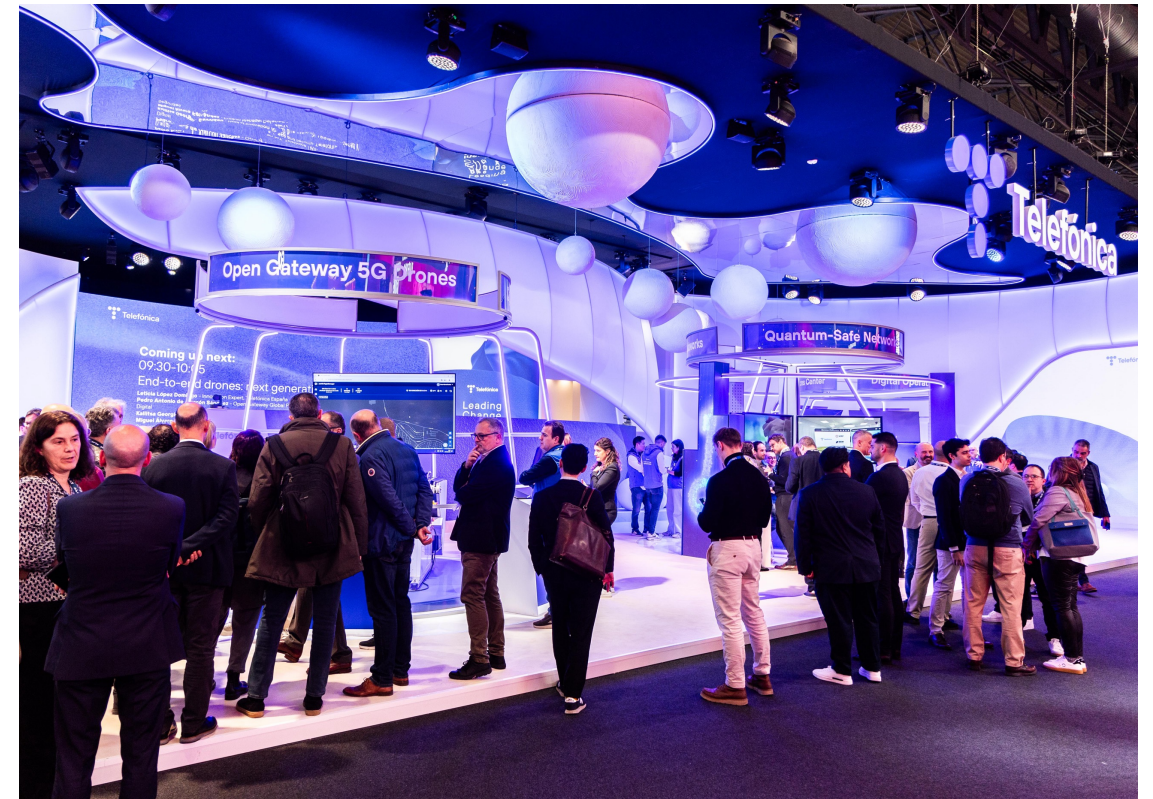
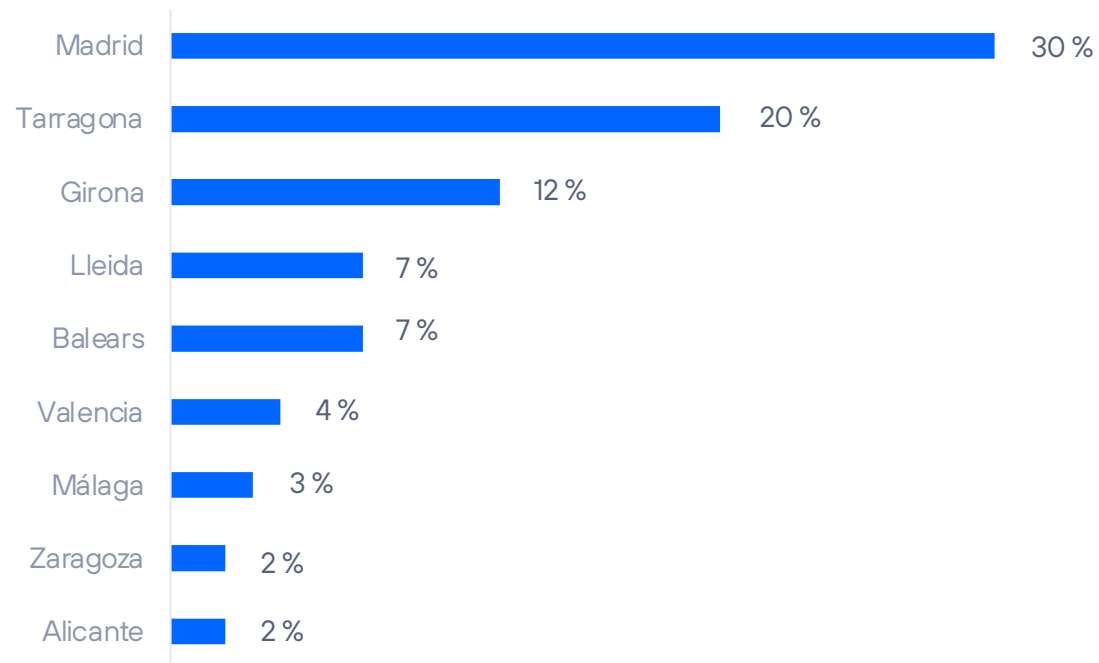
TOP national origin countries at the Fira Barcelona during the previous week to the MWC 2025

ANALYSIS OF TOURIST FLOWS AND MOBILITY AT THE **MWC25**



TOP provinces of origin of national visitors in the previous week to the MWC

There are few significant changes in the number of national visitors from one year to the next. It can be seen that the week before the MWC most of the visitors to the Fira Barcelona come from Madrid, followed by Tarragona.





Benefits provided by Smart Steps

How can this solution help in the analysis of crowd mobility?

05

Benefits provided by Smart Steps

ANALYSIS OF TOURIST FLOWS AND MOBILITY AT THE **MWC25**

Smart Steps is an advanced technological platform for the analysis of mobility data developed by Telefónica Tech. It uses AI and Big Data techniques to process aggregated and anonymized data from mobile networks, providing insights into the behavior and mobility of large groups of people.

The data is irreversibly anonymized to protect user privacy. Smart Steps transforms this anonymous data from millions of mobile lines connected to the Telefónica group's networks, including national and foreign public connected through roaming.

This data is aggregated and categorized to obtain an overview of mobility behaviors and patterns. The insights obtained with Smart Steps allow companies and administrations:

- To have an overview of the number of visitors, their origin and destination movements, and their recurrence.

- To answer specific questions segmented by sociodemographic and mobility profiles of visitors.

- To assist in planning, urban layout and resource management, in both small and large cities.

- To optimize transport routes and improve targeted communication based on real demand.

- To understand the different behavior patterns between local users and visitors, both national and foreign.

