





1845

Isabel II made La Concha Beach fashionable.

#### 1864

The city walls were demolished.

#### 1893

Queen María Cristina established the Miramar Palace the summer residence of her court.

#### 1912

The Igeldo funicular, the Victoria Eugenia Theatre and María Cristina Hotel were opened.

#### 1953

First edition of the San Sebastian International Film Festival.

#### + 150 YEARS as a TOURIST DESTINATION



## CRAN CONCURSO HÍPICO INTERNACIONAL



SAN SEBASTIAN 35,000 PE Septiembre 1905

#### HIGH QUALITY TOURISM DESTINATION

**185.000** INHABITANTS

- + 640.500 TOURISTS YEAR (2017)
- + 1.294.000 OVERNIGHTS (2017)







BEST EUROPEAN DESTINATION - 2018
Trip Expert

BEST BEACH IN EUROPE- 6TH IN THE WORLD-2018. Trip Advisor. Traveller's

THE BEST 15 CITIES IN EUROPE. 2018
Time magazine

Choice

BEST URBAN FAMILY FRIENDLY DESTINATION IN 2018. Home away

TOP CITIES TO VISIT IN 2016. New York Times

NOMINATED BEST WORLD WIDE DESTINATION-2015
FOOD & TRAVEL -Reader's choice

MOST ROMANTIC DESTINATIONS IN EUROPE. European Best Cities



THE BEST FOOD EXPERIENCES IN THE WORLD. Lonely Plantet. 2018

WORLD'S GREATEST CITY FOR FOODIES?
The Telegraph. 2018

THE SECOND CITY WITH MORE MICHELIN STARS BY 2M Michelin Guide -

8 EUROPEAN VACATIONS FOR SAMPLING FALL'S BEST FOOD. 2018 *Trip to Discover* 

BEST CULINARY DESTINATION -2014 Saveur

WORLD'S BEST FOOD CITIES -2014 Condé Nast Traveller Readers



DSS2016.EU

EUROPEAN CAPITAL OF CULTURE 2016

BEST INNOVATIVE CITY TOURISM -2014

**Europe Business Assembly** 

EUROPEAN CITY OF THE YEAR-2016

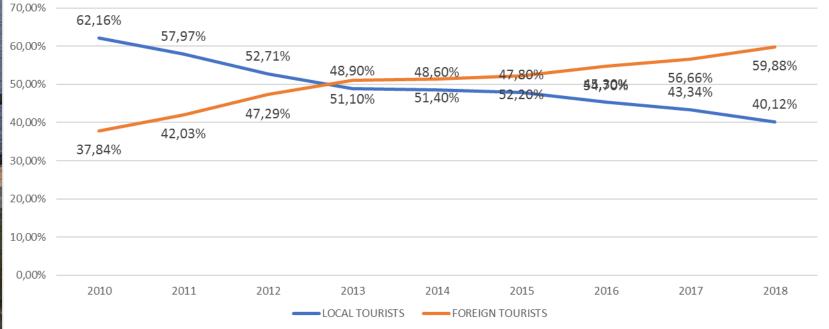
EU Academy od Urbanism

2018
BEST EUROPEAN
DESTINATION
San Sebastián

**TripExpert** 

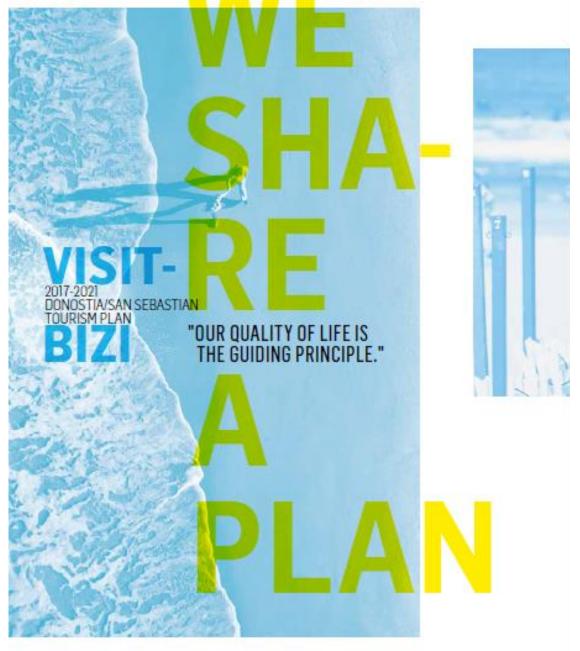
## RADICAL CHANGE IN TOURISM TYPOLOGY





#### ANNUAL GROWTH











HAVE A VIBRANT CITY WITH
INFRASTRUCTURES AND A RANGE
OF CULTURAL OPTIONS THAT RIVAL
THOSE OF MAJOR CITIES.

A TOTAL OF 325 LOCAL SMES HAVE ALREADY JOINED THE SAN SEBASTIÁN TOURISM AND CONVENTION BUREAU AND WORK TIRELESSLY FOR THE PRESENT AND FUTURE SUCCESS OF TOURISM IN OUR CITY.

#### TOURISM IS AN UNSTOPPABLE GLOBAL TREND. WE CAN IGNORE IT OR WE CAN PREPARE OURSELVES FOR IT.



#### TODAY WE ARE ALL TOURISTS.

The new models of online economy the enhancement of the quality of life of seniors and the democratization of travel has resulted in a yearly increase of the number of tourists worldwide

Leisure travel resulted in over 12 billion trips in 2016, and our city is no stranger to this trend.

The type of trip has also varied dramatically due to new ways to book accommodation and transportation; urban destinations are becoming increasingly more popular and many tourists are looking for ways to share local experiences.

The sector's growth trend has continued unabated as a result and seems an inevitable reality in our city.

This reality necessitates a new approach to how we manage tourism so that it fits our goals as a city and as a community of citizens.

#### HOW FAR HAVE WE COME?

The San Sebastian Tourism & Convention Bureau's 2012-2016 Master Plan set two key challenges: deseasonalization -attracting visitors in the off-season- and internationalization.

These objectives were successfully achieved

Congratulations! Together we managed to achieve our goals, thanks to our hospitality and unique way of doing things.

However, everything has its pros and cons. For example, we welcomed a growing number of day-trippers who spent the day in the city but didn't spend the night. This puts massive pressure on certain areas, which we still have time to readjust.

#### IN 2016 \* 1.3 MILLION OVERNIGHT STAYS.

visitors than 2015.



54.7% of overnight stays are by foreigners.

18.3%



growth in winte.

#### Consolidation

We are an international benchmark for quality tourism.



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\* Historical fact The city also had 1,3 Million overnight stays in 1907.

2016 **X** 1.200.000.000 leisure trips worldwide



#### A HUGE OPPORTUNITY FOR OUR CITY.

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Tourism is one of Donostia/San Sebastián's leading industries, and the growth in tourism represents a huge opportunity to shape the **development** and well-being of all citizens. And we can't let this opportunity pass us by.

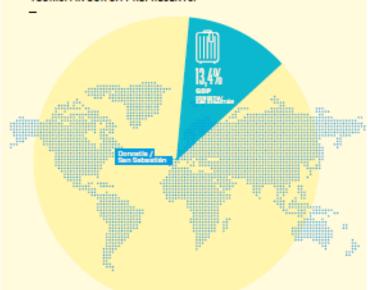
Because it will help us generate more entrepreneurship and employment opportunities and will contribute, through MICE (meetings, incentives, conferences and exhibitions) tourism, to fuel the city's industry, business and R&D+i and attract talent and innovation.

Because it will also help promote Basque culture, language and identity worldwide, while providing the city with greater openness and increased contact with other cultural realities and stimuli.

#### A localized industry that involves numerous sectors.

Tourism is a localized industry, and visitor spanding impacts the entire local production system. Although tourism is frequently linked with hospitality and accommodation, in Donostia the entrepreneurs and local businesses for which tourism has an extremely significant impact (either directly or indirectly) are many and diverse: museums, cultural facilities, shops, tourist guides, research centers/ hospitals/companies from different sectors related to MICE tourism, small businesses that offer visitor services. farmers/fishermen who sell their products to restaurants, and many more.

#### TOURISM IN OUR CITY REPRESENTS:



13,4% OF THE CITY'S GDP

€1 BILLION IN 2015

2016 GENERATED + 15.000

EACH TOURIST SPENDS €123,60/DA

95%

OF TOURISM-RELATED COMPANIES IN DONOSTIA ARE LOCAL SMES\*

"Percentage calculated from the 225 companies associated with San Sebastian Tourism & Convention Bures.

## **02**WHAT TOURISM MODEL DO WE WANT FOR DONOSTIA?

This new plan must address the needs of this new reality and shift more towards what we want to achieve as a result.

The number of visitors is no longer a priority and the focus should shift towards quality. But quality tourism is impossible without a top-tier destination, where public space is better organized and regulated and strengthens the city's identity and personality.

A destination in which the quality of life of the citizens of Donostia is guaranteed as the cornerstone of what makes the city attractive, a concept that we will advertise to certain target audiences in order to consolidate ourselves as a top urban destination on an international scale.

And we can create this type of destination by focusing on four core areas: 01

#### SUSTAINABILITY

SOCIAL, ENVIRONMENTAL, ECONOMIC,

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#### 02

#### BALANCE BETWEEN...

CITYZENS. VISITORS. BUSINESSES.

-1

#### 03

#### QUALITY

OF LIFE. TOURSIM. DESTINATION.

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#### 04 AUTHENTICITY

IDENTITY AND CULTURE. EUSKERA AND TRADITIONS. INDIVIDUALITY.







#### WE'VE CHOSEN A PATH.

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#### we are going to be...

- A destination that will encourage the balanced integration of visitors; in the local region, economy and society.
- A destination that safeguards and improves the value proposition that we offer our visitors and citizens with a reasonable model of evolution for tourist accommodations.
- A destination in which new tourist resources will be offered in the neighborhoods and in the metropolitan area as a whole.
- A destination that serves as a benchmark for quality urban tourism in Europe.
- A destination that serves as a benchmark for quality urban tourism in Europe.
- And a destination that preserves the identity and personality of the city, our landmarks and the images and sensations for which we are renowned.

## THE TYPE OF TOURISM WE'RE INTERESTED IN.

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## YES

#### Experience seekers.

Visitors who want to discover everything that the destination has to offer, understand its essence and live with its inhabitants.

#### Our traditional tourists.

Visitors that we know how to please and who adapt to Donostia/ San Sebastián in search of local experiences. Visitors from Spain, France, UK, Benelux, Germany, Scandinavia, United States, Canada, Japan and Australia.

#### High-profit toursim.

These are the types of tourist activities that generate profitable tourism and place less pressure on the city: MICE tourism, culinary tourism, cultural and creative tourism, urban getaways, premium tourism...

## NO

#### Mass tourism.

Tourists that visit the city with major cruise lines and tourists looking to party and take.

#### Travelers unwilling to adapt. Markets that require us to adapt

Markets that require us to adapt to their own customs and have no interest in sharing or being involved in the local experience.

#### Large groups, quick trips.

Despite passing through quickly they can collapse the city.



# HOW ARE WE GOING TO DO IT?



#### REGULATING ACCOMMODATION. NOT EVERYTHING GOES.

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The increase in tourist apartments is mainly concentrated in certain areas, where traditional residents are facing a situation that may end up displacing them.

We need to effectively regulate this activity without impacting citizens in order for social sustainability to guide the development of our city model and to protect its inhabitants.

#### An Ordinance on Tourist Apartments has been implemented that will:

- Clearly define where these types of apartments can be offered and under which requirements.
- Define a management and inspection team that identifies those apartments that fail to comply with the regulation.
- Establish economic sanctions in cases of non-compliance.

Promote the creation of a framework that defines the relationship with the main online tourist apartment platforms.

#### SPREADING OUT VISITS THROUGHOUT THE YEAR AND ACROSS THE REGION.

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Residents, visitors and day trippers all share our city. This can result in an accumulation of people, particularly in certain places and at certain times of year.

Since our ability to accommodate all these people is limited, we must ensure that this flow of people is better distributed both throughout the year and across the region.

#### To that end, we will make the following efforts:

- Promote tourism in the low season through promotional campaigns, activities and experiences, attracting conferences, etc.
- Promote new areas for tourists to visit in order to channel tourism into other areas of the city and region.
- Open a new visitors' center that is larger and more modern and serves as a showcase for everything the metropolitan area has to offer.
- Analyze the city's limits and capacity and the effects of tourism through an observatory that makes real-time monitoring possible.





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When we move around the city we not only share it with visitors and residents, but also with the people who come here to work, suppliers, services, etc.

The transportation system must be able to handle the peaks in service that can happen when there is an influx of people in the city.

#### So we will launch concrete actions:

- · Regulate the groups that arrive by bus .
- Improve real-time information on transportation and parking in the city, parking lot availability, connections with park-and-ride facilities, etc.
- Promote a plan for the use of public space.
- Bolster the tourist transportation passes.



#### PRESERVE THE OLD TOWN.

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The Old Part is the area of Donostia/San Sebastián that has been most impacted by human pressures.

It is crucial that such a symbolic space for the identity of the city guarantee quality of life and diversity through its social cultural and economic activities.

#### A comprehensive plan for the Old Town will be designed which will involve:

- The designation of a saturated zone for the Old Town. No new hotel or accommodations of any type may be developed in this area.
- Strict control over the tourist accommodation in the area.
- A public space ordinance for hotels and businesses.
- A new plan for the use of public space for organizing events in the Old Town.
- The regulation of advertising and signs.
- A strong boost to the public services for the neighborhood's residents.



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We share increasingly more brands, trends, cultural products and styles. As the world becomes smaller people from around the globe become more and more similar...as do cities.

Our essence, that personality that sets us apart, is what defines us and is something that we want to preserve... And it is also what makes us an attractive city for tourists.

Our language and culture, our individuality and our urbanism, architecture and design are a huge part of our value and something that we must protect from becoming trivialized and standard.

#### These are the proposals:

- Implement actions to promote Basque culture, language, history and Donostia tradition, and everything that makes the city special.
- Creation of measures to support unique hotels and businesses.
- Regulations to maintain the quality of the urban landscape and prevent visual pollution.
- Define and manage the business elements that can be used in public space.





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In order to preserve the quality of life for all the city's citizens, it is important to choose what type of tourists that we want to attract and then position the city to target that audience. We are not interested in mass tourism that could lower our city's value, and therefore will focus on five core areas:

- MICE tourism.
- Cultural and creative tourism.
- Culinary tourism.
- Premium tourism.
- City break tourism.

#### Promoting knowledge and innovation:

MICE (meeting, incentive, conference and event) tourism is an opportunity to attract professionals who exchange knowledge and give added value to our companies. It is an activity that strategically positions San Sebastián as a city of innovation and business competitiveness, fueling the city's industry, business and R&D+i and generating significant value in quantitative terms during the low season.



#### PROMOTING SUSTAINABILITY.

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### **ESKERRIK ASKO!** Thank you!