

VISIT-

SUSTAINABLE TOURISM PLAN
DONOSTIA / SAN SEBASTIÁN
2023-2027

BIZI



OUR QUALITY OF LIFE IS THE STARTING POINT



DONOSTIA
SAN SEBASTIÁN



Donostia
San Sebastián

www.sansebastianturismoa.eus

FROM TOURISM PROMOTION TO INTEGRATED AND SUSTAINABLE TOURISM MANAGEMENT.


In recent years we have experienced profound **changes at a global level** that have consequences for the tourism sector in Donostia / San Sebastián. We face several challenges: recovery from the coronavirus crisis, align our activity with sustainable development, manage climate emergency and maintain the city's prosperity.

Tourist activity can affect many areas of a destination, for this reason it is necessary to tackle it from a **multisectoral approach**, taking into account management areas such as sustainability, the preservation of culture and the socio-economic development of the local community.

This new **Visit Bizi** plan is a continuation of the previous tourism plan, but with a greater focus on the **management of the city as a tourist destination**; a plan that stops looking at visitor growth figures, and focuses on promoting measures to find a **balance and well-being** between citizens, visitors and the sector.

In short, a new tourism model, based on **sustainability** and **participation**, which will help us to achieve **friendlier tourism for everyone**.

AIMS OF THIS PLAN



The **prosperity**
of the city
+
The **well-being**
of citizens of
San Sebastian

2

Sustainability
Environmental
Economic
Social

3

Balance between:
Citizens
Visitors
Tourist sector

4

Shifting the focus:
Quality of life and
visit **versus the**
number of visitors

THE SUSTAINABLE TOURISM
PLAN 2023 - 2027 VISIT
BIZI IS ALIGNED WITH THE
CITY'S STRATEGIC PLAN AND
ENVIRONMENTAL PLAN

01

TOURISM WILL CONTINUE BEING A GLOBAL AND UNSTOPPABLE TREND. ITS MANAGEMENT WILL BE KEY TO OUR WELL-BEING.

2022 IN FIGURES

1.7 MILLION OVERNIGHT STAYS

16%
visitors + than in 2019



65%
average occupancy per room

8,98
visitor satisfaction rating



155
MICE (Meetings, Incentives, Conferences, Exhibition) events held with 45,964 participants

60% of conferences and
72% of incentive trips are international.



* Source: EUSTAT, DSSTurismoa, Estudio Datakey for DSSTurismoa

NOWADAYS, WE ARE ALL TOURISTS_

New models of **online economy, the increase in the quality of life of elderly people and the democratisation of travel** contribute to an increasing number of tourist trips every year.

After the hiatus caused by the coronavirus crisis, international travel picked up again in 2022, and our city is no stranger to this trend.

The way we travel is changing.

_ **Changes in demand:** generational changes, new consumer habits, the search for experiences, for what is authentic and local, concern for sustainability...

_ **Technological and digital transformation:** the user is at the centre of the system and the power to influence resides in visitors.

_ **Environmental challenges:** excessive consumption, exploitation of resources, generation of waste...

Rather than denying this trend, we must act and manage this reality in order to meet the challenges we face.

_ **Participatory governance** (citizen participation, public and private partnerships, etc.)

_ **Climate change and decarbonisation**

_ Implementation of the principles of the **circular economy**

_ **Knowledge and monitoring** for decision making

_ Communication and training for **tourism sustainability**

_ **Redefining success**

_ **Rights and equality** in the tourism sector

82% OF EUROPEANS ARE WILLING TO CHANGE THEIR TRAVEL HABITS FOR MORE SUSTAINABLE PRACTICES.

* Source: Eurobarómetro 2021

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AN OPPORTUNITY THAT PERMEATES THE CITY_

The tourism is one of the sectors that contributes most to Donostia / San Sebastián. This activity represents a great opportunity for **development and well-being** for all citizens. It helps us to generate more **employment** and **entrepreneurial** possibilities; and contributes, through congress tourism, to **boosting our industrial, business and R+D+i fabric**, attracting talent and innovation, and positioning us on an international level.

The tourist sector also helps to spread Basque culture around the world, while at the same time providing us with more openness and greater contact with other realities.

A non-delocalisable activity that involves various sectors.

Tourism is a localised industry, and visitor spending **permeates the entire local productive system**. Although tourism is often linked to hospitality, in Donostia / San Sebastián, there are many **entrepreneurs and local businesses in different sectors** for which tourism has a very important impact, directly or indirectly: museums, shops, tour guides, research centres, hospitals, companies linked to congress tourism, small businesses that offer services to visitors and to people involved in agriculture, livestock and fishing, selling their products to restaurants and much more.

THANKS TO MORE THAN
A CENTURY OF TOURISM,
TODAY WE HAVE A LIVELY
CITY WITH INFRASTRUCTURE
AND A CULTURAL AGENDA
ON A PAR WITH OTHER
MAJOR CITIES

TOURISM IN THE CITY REPRESENTS

13,9%
OF THE CITY'S GDP
€1065 MILLION

+ 15.000
JOBS

95% of the companies related to the tourism sector in Donostia / San Sebastián are local SMEs*

ECONOMIC IMPACT OF
TOURISTS

€243,8
MILLION

€204,7

EXPENDITURE
PER TOURIST/
DAY

€975,1

TOTAL
EXPENDITURE
PER TOURIST

*Source: Ibiltur 2022 and the Ikei study for DSSTurismoa

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WHAT DO THE PEOPLE OF SAN SEBASTIAN THINK?

1 **85%**
consider tourism to be an
**overall beneficial element
for citizens.**

2 **70%**
value the importance
and contribution
of tourism to
the **economic
development of the
city.**

3 **65%**
of the people of San
Sebastian believe
that **we have
already reached the
“tourist ceiling”.**

THE REALITY THAT SUPPORTS THE NEED TO TAKE ACTION_

_ **Day trips** Since 2015, the tourist office has received 50% more day trippers, a phenomenon that has a great impact on the occupation of urban space.

_ **New hotels.** In the last five years, more than 30 new hotels have been opened, which has meant 36% more rooms.

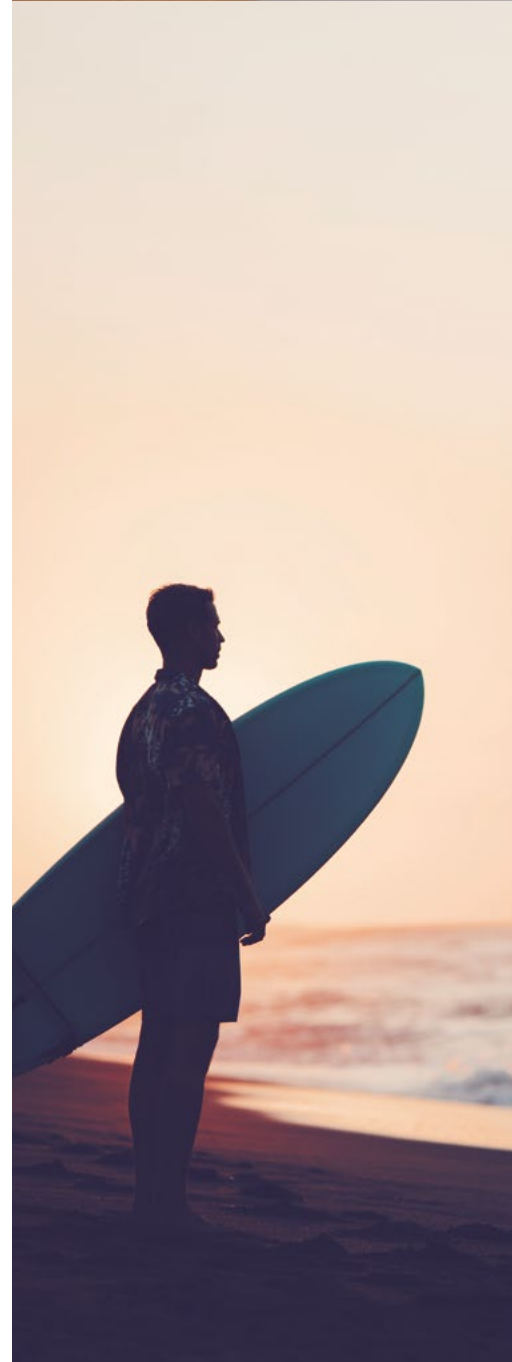
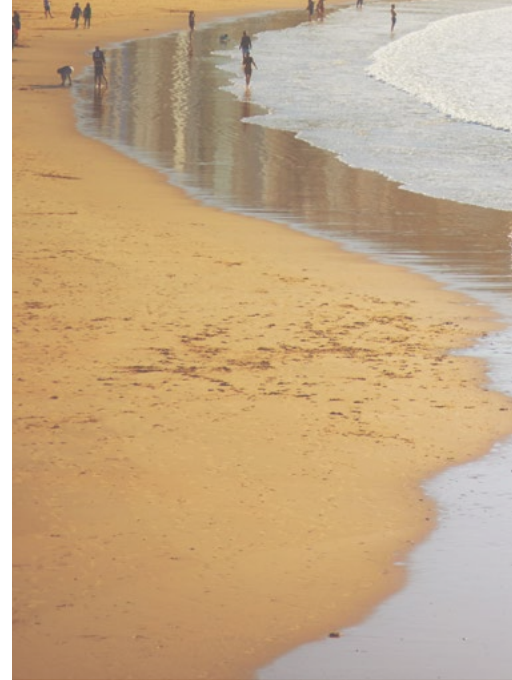
_ **Tourist dwellings.** In 2023 there are 1355 dwellings for tourist use, an increase of 8.4% compared to 2017.

_ **Guided tours and free tours.** Large-size group visits have increased significantly in recent years.

_ **Mobility.** 65% of visitors arrive in the city by private car.

_ **Turistification.** Tourist pressure in areas of the city such as the Old Quarter, the Ensanche and the Gros district.

Day trippers: Day visitors
Tourist: Overnight visitor
Visitors: Both. Day and overnight visitor





02

WHAT MODEL OF TOURISM DO WE WANT FOR DONOSTIA / SAN SEBASTIÁN?

This plan aims to develop a **sustainable tourism model**.

A plan in which the **number of visitors is no longer a priority over quality**. The aim is to maintain the opportunities that tourism offers by targeting strategic audiences. But it is also true that there can be no quality tourism without an appropriate destination in which public space is **well regulated** and the **identity of the city** is reinforced.

A destination in which the quality of life of the people of San Sebastian is guaranteed. **An authentic city, with quality of life for its inhabitants, will also be attractive for its visitors.**

And we will achieve this based on 5 key elements:

01
SUSTAINABILITY
Social, environmental, economic.

02
BALANCE
Between citizens, visitors, tourism sector.

03
QUALITY
Of life, visit and destination.

04
AUTHENTICITY
Identity and culture, Basque and traditions, uniqueness.

05
PARTICIPATION AND COLLABORATION
Citizens, visitors, public sector, private sector.

THE AIM IS NOT TO CONTINUE TO GROW IN VISITOR NUMBERS

WE HAVE CHOSEN A PATH_

We are going to be:

- _ A destination where we encourage visitors **to integrate** in a balanced way; in the territory, the economy and the society of San Sebastian, inviting them to experience the city just like a person from San Sebastian, based on **sustainability** and **respect**.
- _ Maintaining and improving the **value proposal** we offer our visitors and citizens.
- _ **Providing regulated accommodation.**
- _ In which new resources will be offered in **neighbourhoods** and in the **territory**.
- _ A reference model for **quality** and **sustainable** urban tourism in Europe.
- _ And in which the **identity and personality** of the city, our symbolism, our values and the images and sensations that characterise us **will be preserved**.
- _ We will take action against the **climate emergency**. There will be no regeneration if we do not address it proactively.
- _ We are committed to **participative governance**, involving citizens (and on occasions visitors), and promoting public and private collaboration.





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WHAT TOURISM ARE WE INTERESTED IN _

YES

_ Experience seekers: Visitors who want to get to know our destination in depth, understand its essence and live with its inhabitants.

_ Our traditional visitors: Those with whom we fit in and who adapt to Donostia / San Sebastián looking for the local experience.

_ Respectful visitors who share our commitment to the environment: Who visit, enjoy and explore the city in a sustainable and respectful manner.

_ High added-value tourism: These are the types of tourist activities that generate valuable visits and cause less stress on the city: MICE tourism, gastronomic, cultural, premium tourism, etc.

_ Visitors from strategic markets for the city: Local, regional, domestic, France, UK, Ireland, Germany, Italy, Belgium, the Netherlands, Northern Europe, USA, Canada, Mexico, Japan and Korea.

MICE: Meetings, Incentives, Conferences, Exhibitions

NO

_ Mass tourism: Large cruise ships, party tourism, binge drinking, sun and beach.

_ Travellers who do not adapt: Those who demand that we adapt to their customs and who do not seek to share and integrate into the local experience.

_ Large and fleeting groups: Who pass through with little or no contact and who can overwhelm the city.

NEW APPROACH

Based on

QUALITY as opposed to **QUANTITY**
PROSPERITY as opposed to **PROFITABILITY**
SLOW PERSPECTIVE as opposed to **ACCELERATION**

03

OUR ROADMAP



01

REGULATE ACCOMMODATION. NOT EVERYTHING GOES_

The increase in different types of tourist accommodation has concentrated in certain areas, where traditional residents are facing circumstances that could end up displacing them.

We need to effectively regulate this activity so that it does not affect citizens, so we will continue to analyse the data neighbourhood by neighbourhood in order to restrain the process of opening hotels, hostels, tourist accommodation, etc.

We are working on several actions to regulate accommodation.

_ Generally **licences are suspended** for the opening of new hotels or tourist accommodation, and for the extension of existing ones in several areas of the city (Old Quarter, Ondarreta, Ategorrieta-Ulía, Centre, Gros, Ibaeta) until the modification of the General Plan is approved.

_ **Licences for residential plots in the rest of the city are suspended.**

_ The **Old Quarter** is excluded from this suspension as it is already considered to be saturated, the corresponding limitation on the implementation of accommodation uses having been regulated in 2020.

_ Work is being carried out on a new **Regulatory By-law for Tourist Dwellings** within the General Urban Development Plan.

02

SPREAD VISITS THROUGHOUT THE YEAR AND THROUGHOUT THE TERRITORY_

Residents, tourists and day trippers coexist in our streets. This can lead to an agglomeration of people, especially at certain times and places.

Since our capacity to accommodate everyone is limited, we must ensure that this influx of people is better distributed, both over time and across the territory.

To achieve this, we are working on several lines of action.

_ Promoting tourism **outside the high season**, in a **very segmented** way towards strategic audiences, promoting our values and positioning ourselves as a quality destination that is committed to sustainability.

_ Promoting new areas of attraction to vitalise **other areas** of the city and the territory.

_ Opening a **new, larger and modernised visitor reception area**, which will serve as a showcase, together with information on the web and social networks, for proposals outside the busiest areas and throughout the territory.

_ **Limiting the number of people in guided tour groups.**

_ **Prohibiting the use of public address systems** or voice amplifiers for groups.

_ **Limiting the number of groups** in the same area at the same time.

03

IMPROVE ARRIVAL AND
MOBILITY IN THE CITY _

As we move around the city, we not only share the roads with residents and visitors, but also with people who work here; distributors of supplies, services, etc. The mobility system must be able to integrate the tensions that may arise at times of greater concentration.

In addition, in line with the commitment to environmental sustainability, access to the city will be promoted via the most sustainable routes possible.

Some specific actions that are being studied:

- _ **Incorporate** the dynamics of the **tourist sector** into the **Sustainable Urban Mobility Plan**.
- _ **Regulate tour group** coaches.
- _ **Improve information in real time** and in advance about access to Donostia / San Sebastián, mobility and parking in the city, car park occupancy, etc.
- _ Set up **park-and-ride** services with bus connections to the city centre.
- _ Promote arriving in Donostia / San Sebastián via **sustainable transport** (train, bus...).
- _ Promote **tourist bus and train** and mobility on foot or by **sustainable** means of **transport**, such as bus or bicycle.

04

SPECIAL CONSERVATION
OF THE OLD QUARTER,
THE EAST ENSANCHE,
THE PORT AND GROS _

The Old Quarter is the traditional leisure hub of Donostia / San Sebastián and the one most affected by concentrations of people.

It is essential that in such an important symbolic space for the personality of the city, quality of life and diversity in its social, cultural and economic activities are guaranteed.

Actions for the Old Quarter.

- _ Maintain the declaration of **saturated zone in the Old Quarter**. No new hotel or accommodation activities of any kind will be allowed to start up.
- _ A by-law to **control public space** for the **hospitality** and **retail** industry.
- _ A plan for the use of **public space** for the organisation of **events**, so as not to concentrate all the activity in the same place, diversifying zones.

In addition, special attention will be paid to areas such as East Ensanche, the Port and the district of Gros, and measures will be taken to restrain growth in the most vulnerable areas: licences to open new hotels or tourist accommodation will be suspended and strictly controlled.

OUR ROADMAP



05

PRESERVE THE CITY'S OWN CULTURE, IDENTITY, AUTHENTICITY _

Increasingly, we all share brands, trends, cultural products and fashions. Every day, people from different parts of the world are becoming more and more alike. And the same with cities.

Our essence, our distinct personality is what defines us and is what we want to preserve... it is also what makes us an attractive city for those who come to visit.

Our culture, our singularities and our urban planning, architecture and urban design contribute much to our value, and we must protect them from trivialisation and standardisation.

These are the proposals.

- _ Implementation of actions to promote Basque culture, the **history** and **traditions** of **San Sebastian**, and everything that makes the city special.
- _ Creation of measures to **support** the unique **hospitality** and **retail industry**.
- _ Measures to **protect the city's unique heritage and urban landscape**, preventing visual pollution.
- _ Define and **control commercial elements** that can be used in common spaces.

06

EUSKARA, DONOSTIATIK MUNDURA _

Our language, Basque, the oldest language in Europe, is a treasure that we must cherish, extol and show to the world. It is part of our roots, and it differentiates us, identifies us and makes us special.

Some of the actions.

- _ Campaigns to **promote our language** among our international visitors.
- _ **Encourage** those who visit us to **use our language**.
- _ Promote Basque in **all our dissemination formats** (competitions, interactive content for the web, social networks...).
- _ **Promote the knowledge and use** of Basque in the tourism sector in San Sebastian.





07

DISTANCE OURSELVES FROM MASS PROMOTION, SEGMENTING THE PUBLIC AND SELECTING STRATEGIC MARKETS_

To preserve the quality of life of the people of San Sebastian, it is essential to select the public we want to attract and to position the destination for our point of focus. We do not want mass tourism that could degrade our city, which is why we have been working for years on five strategic lines of great added value:

- _ **MICE tourism.**
- _ **Cultural tourism.**
- _ **Gastronomic tourism.**
- _ **Premium tourism.**
- _ **City break tourism.**

Promoting knowledge and innovation.

We pay special attention to MICE or conference tourism, as it is an activity that strategically positions Donostia / San Sebastián as a city of innovation and business competitiveness, boosts the industrial, business and R+D+i fabric and provides great value out of season.

08

TECHNOLOGY AT THE SERVICE OF PEOPLE_

We will use technology and smart solutions to improve the sustainable development of the destination, the quality of life of our citizens and the quality of the visits.

Some of the actions.

_ **Creation of the Sustainable Tourism Observatory.** We will analyse the radiography of tourism in the city in order to make predictions and base decision-making on real data that will contribute to improving the quality of life in the city.

_ **Digitalisation.** We will help to achieve the digital competences of the tourism sector in Donostia / San Sebastián through advice, training and support in the digitalisation process.

_ **Smart Tourist Destination.** We will continue to work on the implementation of this model with the aim of improving the competitiveness and development of tourist destinations.

_ We will promote **entrepreneurship** and **innovation** in the tourism sector through research groups, clusters, collaboration with other entities, mentoring programmes, etc.

OUR ROADMAP

09

PROMOTE PARTICIPATION AND COLLABORATION

A comprehensive tourism plan will never work without the involvement of citizens. It is essential to involve the people of San Sebastian, listen to them and encourage public-private collaboration.

Algunas de las acciones.

- _ Facilitate **participative** processes, meetings and workshops..
- _ **Open channels** to give citizens and visitors a voice.
- _ Promote actions to improve coexistence and the creation of opportunities for the purpose of **exchanging and sharing** between residents and visitors.
- _ Conduct **citizen surveys**.
- _ Foster **coordination** between *Donostia San Sebastián Turismoa* and all the departments of the City Council (mobility, economic development, environment, town planning, Basque language, participation, etc.).
- _ Strengthen **collaboration** with local and regional private companies and destinations in the metropolitan area, other institutions and local, regional, European and international networks.
- _ Work hand-in-hand with the **tourism sector** and our **partner companies**.

10

CREATE A TOURIST TAX, FOR THE BENEFIT OF CITIZENS

The maintenance and management of tourist resources - beaches, promenades, monuments, museums, etc. - demands a significant effort from all the people of San Sebastian.

This measure aims to make tourists and day trippers share in these costs, so that the burden is more equitably distributed, and the **revenue is used to improve our city** and, in short, to promote sustainable use of the available resources.





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11 PROMOTE SUSTAINABILITY _

In addition to the actions mentioned, **further measures** are being analysed **to promote socially, economically and environmentally sustainable tourism:**

_ Promoting the transition towards a **climate-neutral** city, based on sustainable mobility, applying the principles of the **circular economy** in the tourism sector.

_ Implementing measures to reduce **environmental impact**, such as measuring and offsetting the carbon footprint, avoiding the use of plastic and food waste.

_ Coordinating the tourism sector to promote **social, sustainable and solidarity campaigns and actions.**

- Creating or participating in international forums for reflection, consolidating the leadership of Donostia / San Sebastián in the **global conversation on tourism and sustainable development.**

_ Actions to promote **equality** in the sector and in the destination.

_ Continuing with the development of **Accessible Tourism** to guarantee provision for all kinds of needs and to position ourselves as an inclusive and quality destination.



— 04

A PLAN CREATED FROM TEAM EFFORT



DO YOU HAVE ANY SUGGESTIONS ON HOW TO IMPROVE THE MANAGEMENT OF TOURISM IN OUR CITY? WE READ YOUR FEEDBACK!



www.sansebastianturismoa.eus

THE MEETING POINT FOR MANY PEOPLE_

The creation of the Donostia / San Sebastián Sustainable Tourism Plan 2023-2027 VISIT-BIZI has entailed the efforts of a large number of people and entities with **very technical profiles** who have provided their expertise, knowledge and foresight.

It has taken more than a year of work and development over several stages before being able to share it with you. In one way or another, **experts, professionals from the sector, all political parties, citizens and Donostia / San Sebastián Turismoa**, which has more than 325 members, almost all of them local SMEs, have all been involved.

325 SMES ARE NOW PARTNERED WITH DONOSTIA SAN SEBASTIÁN TURISMOA, WORKING DAY BY DAY FOR A SUSTAINABLE FUTURE FOR TOURISM IN OUR CITY.