

# SSIFF

Donostia Zinemaldia  
Festival de San Sebastián  
International Film Festival

# Report on the economic impact of the San Sebastian Festival 2024

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 #72SSIFF

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## Introduction

For more than seven decades, the San Sebastian Festival has been providing a meeting place for movie buffs, the specialised press and the film industry. But over and above the international projection attained by the films, names and awards in its programme, it has also gained in strength as an event that offers much more than a simple cultural get-together. This means that the Festival is an important economic motor for the city and its surrounding area, with an equally beneficial impact in terms of creating jobs, notoriety and outreach.

This report, commissioned from Ikertalde, the consultancy group who also compiled the previous study in 2012, aims to quantify and analyse the impact generated by the San Sebastian Festival, having taken as its reference the 72nd edition, running from 20-28 September 2024. According to the data compiled, the event had an **economic impact of 47.9 million euros**.

On the one hand, **18.3 million euros** of these 47.9 million correspond to the **direct impact** of the sums injected by the event organisation. This includes the contracting of both services and personnel (12 million), plus the income received from the stay and consumption in the Basque Country of people involved in delivering the Festival (6.3 million).

On the other hand, the **indirect impact**, estimated at almost **14 million euros**, corresponds to audience mobilisation, i.e. to the amount spent and consumed by Festival attendees in general as well as on the purchase of tickets. The majority of this amount (10.7 million) can be attributed to visitors from outside the city who required overnight stays, while the remainder corresponds to the locals of San Sebastian (almost 2 million) and to visitors not requiring an overnight stay (1 million).

Finally, the **induced impact**, amounting to almost **16 million euros**, stems from the mobilisations and sums disbursed throughout the economic value chain.

Furthermore, this study enables us to assess the beneficial effect of public investment in culture, given that the Festival activity generated an **economic return** of 8.4 million euros for the local government in the shape of taxes and other amounts received.

In terms of **employment**, the San Sebastian Festival staff is made up of 40 people working in year-round jobs, who were joined in 2024 by the approximately 320 contracts (80% falling within the month of September) issued to cover the specific needs of delivering the event.

If anything sets the San Sebastian Festival apart from other events of international scope it is the strength of its roots within the city. Thus, the 2024 edition recorded **172,301 screening attendees**, 123,211 (71.5%) of whom were members of the general public.

To calculate the amount disbursed by attendees, the study takes as its key unit the active film day, defined as the day of active participation by a person in the Festival on watching at least one film; this means that a person generates as many active days as the different days on which they attended a film screening, independently of the number of films they viewed each day. According to the analysis of purchasing behaviour by the general public, each person watched an average of 1.3 films at the Festival, the equivalent of **95,966 active days with respect to the generation of expenditure**. Of these, approximately half, 46,064 (48%), correspond to the people of San Sebastian, 15,462 to visitors who did not stay overnight (15%) and 34,440 to people who did spend the night in or around the city (36%).

The report also reveals insightful figures regarding the outreach provided by the Festival to San Sebastian with respect to positioning and notoriety, whether thanks to projecting the image of a city strongly dedicated to a culture of quality, or to the constant appearance of the event in all kinds of national and international media. In this respect, last year **more than 162,000** news articles were published, with almost 144,000 million viewing opportunities, while the **advertising exchange value came close to the 1,900 million euro mark**.



### Participation in the 72nd edition

The general public represents 71.5% of all San Sebastian Festival attendees. Attendance is homogenous over the 9 days of the event, with peaks during the first weekend.



# 172,301

## Screenings attendees

### Attendees by audience type

**123,211** general public (71.5%)

**31,366** accreditation holders (18.2%)

**4,685** film delegations, jury members, etc. (2.7%)

**13,039** schools at screenings in the Velodrome (7.6%)

In the case of accreditation holders, the analysis is based on their stay in the city rather than on the number of films viewed.



# 5,314

## Accreditation holders

### Accreditations by type of professional

**1,062** journalists from **578** media outlets

**2,392** industry representatives

**1,860** film delegations and academic institutions



### Participation in the 72nd edition

The study is based on the active film day as the main unit for calculating the amount spent by attendees. Based on an analysis of the spectators' purchasing behaviour, the estimate made is around 1.3 films per person as the most accurate hypothesis of approximation to the Festival, meaning that the 72SSIFF has racked up some 95,966 days among all members of its general public, not including professionals.

The surveys carried out show that the audience of locals of San Sebastian make up approximately half of these days, with another 15,462 corresponding to visitors not sleeping in the city, while the SSIFF generates a little more than 34,000 film days among tourists.



# 95,966 \*

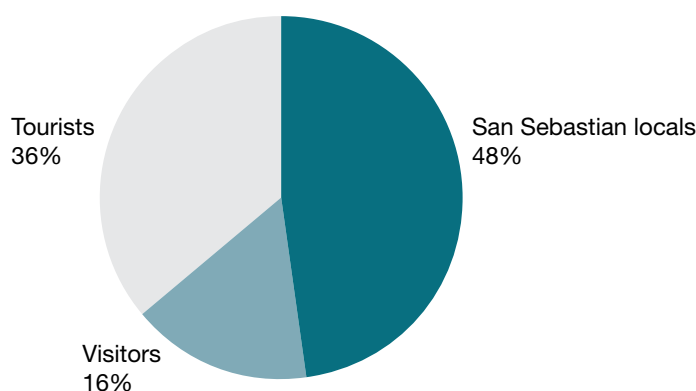
Active days with respect to the generation of expense  
(attendance / effective day)

Effective days by audience type

**46,064** days referring to locals

**15,462** by visitors not sleeping in the city

**34,440** days referring to tourists





## Direct impact of the 72nd edition

The San Sebastian Festival generates local, regional and national impact as a result of its budgetary performance. This translates into an injection into the economy arising from the amount of the budget dedicated, mainly by the organisation, but also by other bodies, to:

- Paying wages.
- The hiring of local, regional or national companies to deliver budget items associated to organisation of the event.
- The third-party hiring of local companies and people: sponsors and other associated companies which find in the Festival a vehicle for delivering their campaigns and other actions.
- The stay and expenditure of people associated to said delivery – staff hired, press, jury members, film delegations, representatives of the film industry and of the institutions, of the academic world, installation/ assembly companies, etc. – and who do not have local residence.

The part executed by the Festival in companies has meant an economic injection of 8.1 million euros, spread over 447 companies and collaborating bodies: among them, 249 Basque companies for the sum of 4.6 million euros, and 198 companies from the rest of Spain, for the sum of 3.3 million euros. It is important to mention the impact on the territory of the amount spent on hiring people, with a value of 3.4 million euros.

Accreditation holders and those related to implementing the Festival have left a sum of almost 6.4 million euros.

IMPACT OF THE ORGANISATION AND PARTICIPANTS	€ 18,314,454
<b>Injection in the business and economic fabric due to the contracting of services and people</b>	<b>€ 11,963,742</b>
Injection by the Festival due to the contracting of services and the direct purchase of goods between companies	€ 8,109,918
Economic injection by other companies: contracts, events, etc.	€ 548,604
Staff hired in the organisation *	€ 3,305,220
<b>Contribution arising from stays and consumption in the Basque Country by people involved in implementing the event **</b>	<b>€ 6,350,712</b>
Production, organisation, film delegations, representatives of the film industry and of the institutions, of the academic world and other accredited persons	€ 4,803,040
Sponsors and companies –overnight stays and others	€ 245,956
Accredited press	€ 1,301,716

\* The rate of family savings has been deducted, set by the Spanish Statistics Agency at 7%. Non-financial three-monthly accounts. Dec. 2024.

\*\* In this section, only spending – on overnight stays, consumption, purchases, activities – by those belonging to accredited groups or professionals who do not live in the territory is accounted for.





### Indirect impact of the 72nd edition

The San Sebastian Festival has generated an impact of 13,706,149 euros thanks to mobilising different kinds of public. This refers to the consumption, purchases, journeys or overnight stays made, provided that they can be attributed to the Festival (12.7 million euros), added to that arising from the purchase of tickets for screenings (1 million euros).

The largest part of this sum can be attributed to tourists coming to the city, amounting to 10.7 million euros (78.1% of the total). For their part, locals and visitors not sleeping in the city – often coming from the province – are responsible for the remaining 21.9%, 3 million euros.

	DUE TO PURCHASES AND CONSUMPTION BY SCREENING ATTENDEES		DUE TO SCREENINGS TICKETS PURCHASED AT THE 72SSIFF		INDIRECT TOTAL
	€ 12,700,799	+	€ 1,005,350	=	€ 13,706,149
LOCALS	€ 1,502,511	+	€ 482,571	=	€ 1,985,082
VISITORS NOT SLEEPING IN THE CITY	€ 857,251	+	€ 161,982	=	€ 1,019,233
TOURISTS	€ 10,341,037	+	€ 360,797	=	€ 10,701,834

85.6%

of people attending screenings spend money on items other than tickets.



## Total economic impact of the 72nd edition

# 47.97 MILLION EUROS

The production generated in the economy is 47.97 million euros. In budgetary terms, this means almost 4.3 times the budget used for its creation and delivery.

In terms of year-round employment, the production generated is equivalent to the creation of 419 contracts spread over the economy across the territory, and independently of directly established contracts.

### DISTRIBUTION OF INCOME OBTAINED:

- **18,314,454 euros correspond to the amounts injected by the event organisation:** contracting services from companies, own wages, and the stay of people involved in organising and delivering the event: film delegations, representatives of the film industry and of the institutions, of the academic world, accredited press, jury members and other providers and creditors.
- **13,706,149 euros correspond to mobilisation of the public.** This refers to the consumption of cinema-goers: those who have come to the city expressly to attend the screenings, or who have participated in the Festival while here, and also those who have participated, coming from the surrounding area, but with no need to stay overnight in the city. It also refers to the locals of San Sebastian who attend the Festival.
- **15,952,080 euros of induced impact on the economy.** The transactions related to the direct and indirect impacts mentioned above in turn imply third-party mobilisations and purchases throughout the economic value chain – intermediate productions and consumption in all sectors of the economy entailing multiplication of the production initially established by the Festival. This interdependency between sectors, and the consequent multiplier effect of the initial production, is established on the analysis of the regional Input-Output tables.

ITEM	AMOUNT (€)
<b>DIRECT IMPACT</b> (organisational expense)	€ 18,314,454
<b>INDIRECT IMPACT</b> (spending by tourists, visitors not sleeping in the city and the Basque citizens mobilised)	€ 13,706,149
<b>INDUCED IMPACT</b> (intermediate productions throughout the value chain)	€ 15,952,080

<b>TOTAL PRODUCTION</b>	<b>€ 47,972,683</b>
GDP	€ 27,159,875
RETURN OBTAINED IN THE ADMINISTRATION	€ 8,454,834



## Breakdown of the economic impact

# 47,972,683 EUROS OF TOTAL PRODUCTION

€ 18,314,454 BY THE EVENT ORGANISATION		€ 13,706,149 DUE TO MOBILISATION OF THE PUBLIC		€ 15,952,080 DUE TO INTERMEDIATE PRODUCTION	
Local org. contracting *	€ 8,109,918	Overnight stays	€ 3,327,433	To satisfy the demand for products and services generated by the above areas, interrelation is required with other sectors of activity, generating a tractor, ripple or multiplier effect (Induced Impacts) amounting to a production of 15.9 million euros. This production translates into:	
Third-party contracting	€ 548,604	Hotel & catering	€ 3,888,678		
Own staff contracting	€ 3,305,220	Shopping	€ 3,424,508		
Related consumption and overnight stays	€ 6,350,712	Transport	€ 1,029,927		
		Tourist activities and other	€ 1,030,253		
		Ticket sales	€ 1,005,350		
		<b>Tourists (overnight stays)</b>	€ 10,701,834		
		<b>Other Visitors + Residents</b>	€ 3,004,315		
<b>513</b> collaborating companies <b>249</b> Basque companies and collaborators* <b>198</b> companies from other parts of Spain* <b>66</b> collaborating professionals from other countries				GDP **	€ 27,159,875
				GVA ***	€ 24,677,697
				Taxes collected and other recoveries	€ 8,454,834
				<b>Net Taxes on Products</b>	€ 2,482,178
				<b>Corporate Taxes</b>	€ 1,330,038
				<b>Social Security</b>	€ 3,197,198
				<b>Personal Income Tax</b>	€ 1,445,420

The members of staff making up the SSIFF structure occupy **40** jobs which continue all year round, with approximately **320** contracts having been issued in 2024 to cover the specific needs of the event proper, 80% of which take place in the month of September.

It is estimated that the 72SSIFF generates **419** jobs as a result of the monetary injection generated by its activity on the territorial economy, independently of those hired by the Festival for the whole year round or for the event itself.

\* As part of the induced impact analysis, a different multiplier has been assigned to analysing the repercussions on the value chain of companies in Gipuzkoa and the Basque Country – with the focus on analysis of the regional (and national) input-output tables – working with the criterion of a national multiplier.

\*\* The share of final output (rent), net of intermediate output in the value chain.

\*\*\* After deducting the share of net indirect taxes (VAT and others) from GDP.



### City brand: outreach

The social and economic impact must not detract from the outreach offered by the Festival to the city in the shape of positioning and notoriety. An impact quantifiable in itself in terms of advertising exchange value and whose profound ability for transformation and strategy is visible in the long term. This refers to:

- **Notoriety:** in view of the constant and repeated appearance of the Festival in all kinds of national and international media.

- **Outreach** of the image of a city strongly dedicated to culture, a high-end location of excellent standing and glamour in keeping with the major filmmakers and stars who link their image to that of San Sebastian

And here another circumstance must be added: the Festival's **legacy effect**, having remained in the imagery of all potential recipients of information for more than 70 years.

	NUMBER	VIEWING OPPORTUNITIES	EQUIVALENT ADVERTISING VALUE
Printed and online press (national)	33,821	53,343,735,294	€ 414,580,203
Printed and online press (international)	35,525	89,358,753,389	€ 1,402,914,865
Radio	1,049	134,850,000	€ 29,103,607
Television	933	244,112,000	€ 23,398,280
Social Media	90,834	438,434,078	€ 3,703,162
<b>Total</b>	<b>162,162</b>	<b>143,519,884,761</b>	<b>€ 1,873,700,117</b>

More than 162,000 news articles, almost 144,000 million viewing opportunities –according to the audiences of said publications, and an advertising exchange value – equivalent to the cost in advertising, in the event of having been contracted in these spaces in the conditions of size, duration or coverage of these publications – of almost 1,900 million euros, constitute enormously powerful indicators of the positioning dynamics generated by the SSIFF for the city of Donostia / San Sebastian.

And this without considering the values, emotions and imagery associated to these communications, subjective in nature, but of no less importance in this outreach.



# Methodology

To create this report, use has been made of a catalogue of primary and secondary information gathered by the consultancy group Ikertalde:

## 1. Primary sources.

- Information provided by the Festival: figures related to the budget, employment and financing. Includes the number of accreditation holders and their tourist behaviour in the city – overnight stays – as well as other relevant data for drawing up the direct economic impact.
- Interviews with bodies related to or which receive impact of the event, inside and outside of the organising body.
- Surveys among spectators of 72SIFF screenings. Responses have been obtained using the CAPI methodology – interviews administered by company personnel, with tablet and online surveys, carried out at the venue doors – and CAWI – computer-assisted web interviews, linked by QR codes scanned at the doors of the Príncipe cinemas or at the central information hub. 940 interviews have been obtained with all of the information, meaning a sample error of  $\pm 3,1\%$  at 95% confidence level and  $p=q$ .
- Profiling and capacity surveys. 621 valid interviews have been obtained focused on variables of profiling and basic behaviour. Combined with the responses to the complete surveys this means a total of 1,561 surveys, with a sample error of  $\pm 2,4\%$  at 95% confidence level, for the basic variables of characterising, profiling and primary behaviour in attendees. These surveys were collected using the CAPI methodology – helped by an interviewer and completed in computer-assisted fashion on a tablet.
- The two data uptakes were carried out on all dates of the Festival, from 20-28 September 2024, at different collection points directly related to the attendance of screenings and of the Festival.

## 2. Secondary sources.

Drawing up the report has required the analysis – and the subsequent incorporation of relevant information to the analysis model – of different statistical sources. The most important are:

- Input-Output tables of the Basque Community. EUSTAT.
- Annual Spanish national accounts: Origin and Destination tables. Spanish Statistics Agency (INE).
- Ibiltur – Study of the profile and behaviour of tourists visiting the Basque Autonomous Community (BAC). Basquetour.
- Survey completed by inbound tourist establishments. EUSTAT.
- Survey of hotel occupation. INE.
- Register of tourist housing in the Basque Country. Opendata. Euskadi.