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BOARD

TOURISM IN ICELAND IN FIGURES, APRIL 2013

REPORT BY: ODDNÝ ÞÓRA ÓLADÓTTIR

TOURISM IN ICELAND IN FIGURES

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ECONOMIC STATISTICS IN ICELANDIC TOURISM

THE SHARE OF TOURISM IN ICELAND'S GDP

In 2010, the share of tourism in Iceland's GDP was 6%, having been between 4.4–6.0% since 2000.

THE SHARE OF TOURISM IN EXPORT REVENUE

Tourism's share in 2009–2012 was between 18.8% and 23.5% according to measurements of the export of goods and services.

	Export of goods and services (ISK billions)	Tourism (ISK billions)	Share of tourism
2009	791,296	155,160	19.6%
2010	865,449	162,649	18.8%
2011	964,396	196,324	20.4%
2012	1,010,744	237,707	23.5%

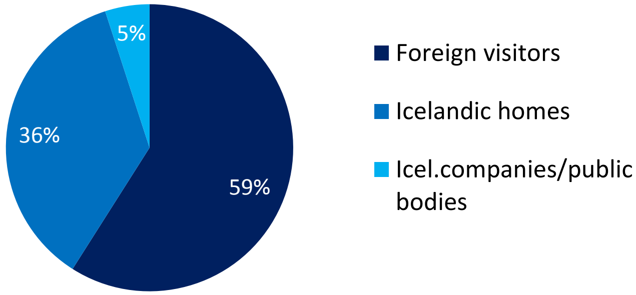
TAXES ON TOURISM

Goods and service taxes from tourism-related activities amounted approximately 15bn in 2010.

TOURISM CONSUMPTION OF FOREIGN VISITORS

Foreign visitors paid approximately ISK 238bn to Icelandic companies in 2012 according to measurements of service transactions. The growth in spending was around 21% between 2011 and 2012. When, however, account is taken of price changes, the real growth was approx. 14%. At fixed-price levels, the spending of international visitors has increased by just under 30% from 2009 to 2012. The above figures relate to international visitor transactions with Icelandic companies, both in Iceland and overseas.

DOMESTIC PURCHASE OF TRAVEL SERVICES 2010



The total travel consumption in Iceland in 2010 was about ISK 199bn. International visitors spent ISK 118bn, or 59% of domestic travel consumption. Icelanders spent about 81bn, or nearly 41% of tourism consumption. Thereof, the expenditures paid by Icelandic homes amounted to approximately 71bn, or 36% of the total tourism consumption. If the revenues from passenger fares earned by the Icelandic air carriers from their overseas operations are added, the foreign currency earnings from foreign visitors increase from ISK 118bn to ISK 170bn.

AVERAGE SPENDING OF FOREIGN VISITORS

International visitors to Iceland spent approximately ISK 106bn in 2012, or approximately 15% more than in 2011.

	Travel consumption ISK bn. [1]	Average spent per person
2009	81,306	164,600
2010	75,503	154,500
2011	91,970	162,600
2012	105,727	157,100

[1]At the 2012 price level. Airline fares not included.

Source: Statistics Iceland.

INTERNATIONAL VISITORS AND CRUISES

Visitors to Iceland have more than doubled since 2000. Their number had risen to 673,000 by 2012. The annual increase has been 7.3% annually since 2000. If this trend continues, Iceland may expect approximately one million visitors by 2020.

	Number of visitors
2000	302,900
2001	296,000
2002	277,900
2003	320,000
2004	360,400
2005	374,100
2006	422,300
2007	485,000
2008	502,000
2009	493,900
2010	488,600
2011	565,600
2012	672,900

	Increase/decrease
'00–'01	-2.3%
'01–'02	-6.1%
'02–'03	15.1%
'03–'04	12.6%
'04–'05	3.8%
'05–'06	12.9%
'06–'07	14.9%
'07–'08	3.5%
'08–'09	-1.6%
'09–'10	-1.1%
'10–'11	16.6%
'11–'12	18.9%
'00–'12	**7.3%**

INTERNATIONAL CRUISE SHIP PASSENGERS

Since 2000, cruise ship passengers to Iceland have increased significantly, from 27,000 in 2000 to 95,000 in 2012. The increase has been 12.4% per year.

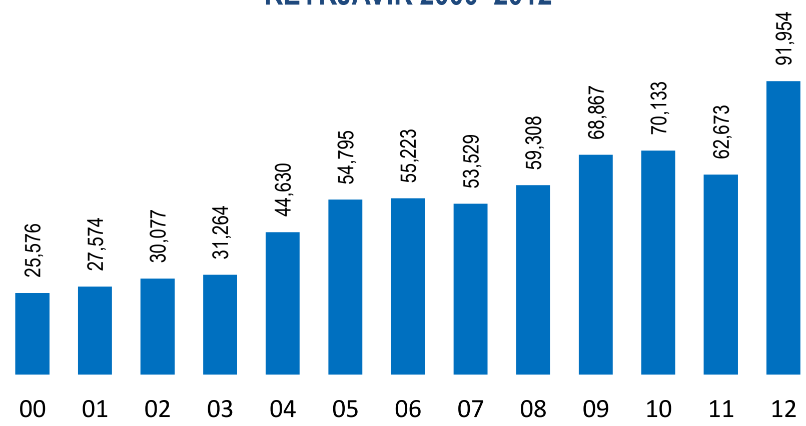
	2010		2011		2012	
	Passengers	Vessels	Passengers	Vessels	Passengers	Vessels
Reykjavík[1]	70,133	74	62,673	67	91,954	81
Akureyri	55,734	58	49,475	56	66,383	62
Ísafjörður	16,790	28	21,000	31	31,385	34
Grundarfjörður	5,088	13	5,674	14	5,784	17
Vestmannaeyjar	4,204	19	5,087	17	4,744	17
Seyðisfjörður, etc.[2]	3,376	8	4,974	10	7,150	14

Approximately 96% of cruise ships that visit Iceland berth in Reykjavik.

[2]In 2012, 396 passengers came to Djúpivogur and 376 to Húsavik.

INTERNATIONAL VISITORS TO ICELAND 2000–2012

INTERNATIONAL CRUISE SHIP PASSENGERS TO REYKJAVIK 2000–2012



Sources: Icelandic Tourist Board, Austfar, Isavia, Air Iceland, Faxaports and other ports that maintain a record of the number of cruise ship passengers.

INTERNATIONAL VISITORS TO ICELAND 2010–12

The total number of foreign visitors was around 673,000 in 2012, an 18.9% increase from 2011, when foreign visitors numbered around 565,000.

The majority came by air through Keflavík Airport (96.2%), 2.2% with Norræna through Seyðisfjörður and 1.9% by air through Reykjavík, Akureyri or Egilsstaðir airports. It should be noted that figures for places other than Keflavík Airport are not based on counts but on assessments based on sales and passenger figures.

Around 647,000 visitors came to Iceland through Keflavík Airport in 2012, 187,000 more visitors than in 2010. Records were broken in every month of 2012.

INTERNATIONAL VISITORS BY POINT OF ENTRY

				Increase/decrease (%)	
	2010	2011	2012	10/11	11/12
Keflavík airport	459,252	540,824	646,921	17.8	19.6
Seyðisfjörður seaport	15,499	12,505	12,780	-19.3	2.2
Other airports	10,265	12,282	13,072	19.6	6.4
Total	485,016	565,611	672,773	16.6	18.9

Sources:
-The Icelandic Tourist Board counts visitors when they leave through Keflavík Airport according to nationality and publishes the figures every month on its website.
-Austfar estimates visitor numbers with Noræna based on sales figures.
-Isavia and Air Iceland estimate visitor numbers through other airports based on passenger and sales figures.

VISITORS THROUGH KEFLAVÍK AIRPORT

By nationality				Increase (%)	
	2010	2011	2012	10/11	11/12
Canada	13,447	17,929	18,760	33.3	4.6
China	5,194	8,784	14,036	69.1	59.8
Denmark	38,139	40,705	40,906	6.7	0.5
Finland	11,012	12,031	13,684	9.3	13.7
France	29,255	35,957	41,570	22.9	15.6
Germany	54,377	56,815	65,179	4.5	14.7
Italy	9,692	12,346	13,841	27.4	12.1
Japan	5,580	6,902	10,343	23.7	49.9
Netherlands	17,281	19,997	21,305	15.7	6.5
Norway	35,662	41,802	51,534	17.2	23.3
Spain	12,237	13,971	15,278	14.2	9.4
Sweden	27,944	32,835	35,601	17.5	8.4
Switzerland	9,163	10,155	12,838	10.8	26.4
UK	60,326	67,608	94,599	12.1	39.9
USA	51,166	77,561	95,026	51.6	22.5
Other	78,777	85,426	102,421	8.4	19.9
Total	459,252	540,824	646,921	17.8	19.6
By market area					
Nordic countries	112,757	127,373	141,725	13.0	11.3
UK	60,326	67,608	94,599	12.1	39.9
Central/S-Europe	132,005	149,241	170,011	13.1	13.9
N-America	64,613	95,490	113,786	47.8	19.2
Other	89,551	101,112	126,800	12.9	25.4
Total	459,252	540,824	646,921	17.8	19.6

VISITORS THROUGH SEYÐISFJÖRÐUR SEAPORT

				Increase/decrease (%)	
	2010	2011	2012	10/11	11/12
Nordic countries	4,867	3,352	3,550	-31.1	5.9
Europe	8,868	7,850	7,967	-11.2	1.5
Other	1,764	1,303	1,263	-26.1	-3.1
Total	15,499	12,505	12,780	-19.3	2.2

INTERNATIONAL VISITORS BY SEASON

Around 47% of visitors in 2012 came during the three summer months (Jun.–Aug.), slightly less than in 2010 and 2011. Just under a third came in spring (Apr.–May) or in the autumn (Sept.–Oct.) and nearly a quarter during winter (Jan.–Mar./Nov.–Dec.).

VISITORS BY SEASON

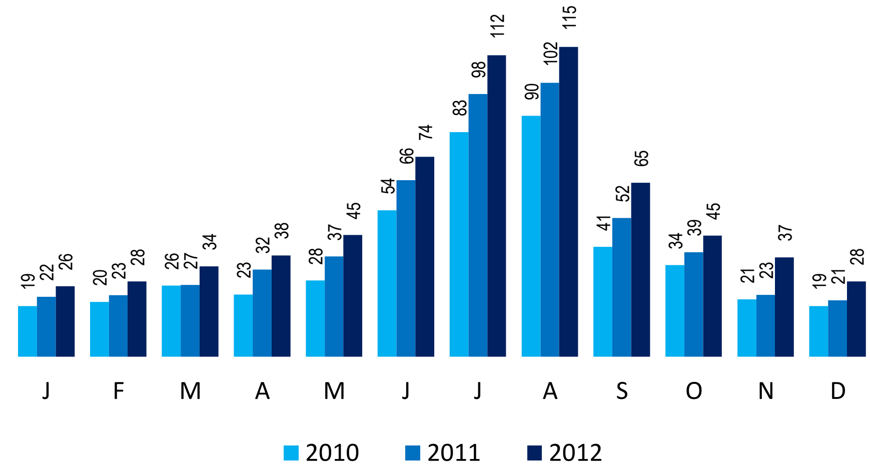
	2010		2011		2012	
	No.	%	No.	%	No.	%
Spring	51,385	11.2	69,545	12.9	82,902	12.8
Summer	227,414	49.5	265,204	49.0	301,725	46.6
Autumn	74,932	16.3	90,412	16.7	109,666	17.0
Winter	105,521	22.9	115,663	21.3	152,628	23.5
Total	459,252	100	540,824	100	646,921	100

Around 62% of visitors from Central/South Europe came during the summer in 2012, approx. 48% from North America and those listed as from “elsewhere”, 40% from the Nordic countries and 23% from the UK. Approximately 37% of visitors from the Nordic countries came during the spring or autumn, as did 30% from the UK and a similar proportion from North America. Just under half of visitors during the winter came from the UK, around 20% came from the Nordic countries, North America and those listed as coming from “elsewhere”.

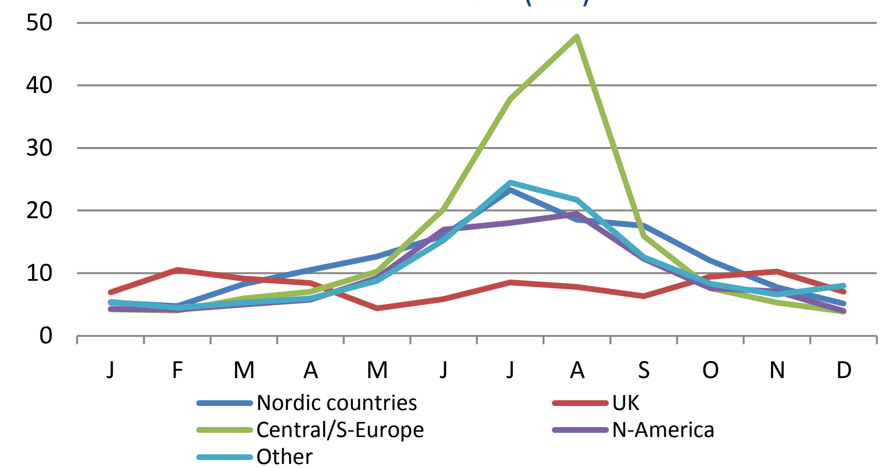
MARKETS ACCORDING TO SEASONS 2012

	Spring		Summer		Autumn		Winter		Total
	No.	%	No.	%	No.	%	No.	%	No.
Nordic c.	23,154	16.3	57,831	40.8	29,538	20.8	31,202	22.0	141,725
UK	12,789	13.5	22,168	23.4	15,771	16.7	43,871	46.4	94,599
Cen/S-Eur.	17,265	10.2	105,856	62.3	23,528	13.8	23,362	13.7	170,011
N-America	14,959	13.1	54,441	47.8	19,922	17.5	24,464	21.5	113,786
Other	14,735	11.6	61,429	48.4	20,907	16.5	29,729	23.4	126,800
Total	82,902	12.8	301,725	46.6	109,666	17.0	152,628	23.6	646,921

DEPARTURES FROM KEFLAVÍK AIRPORT BY MONTH ('000)



DEPARTURES FROM KEFLAVÍK AIRPORT BY MARKET 2012 ('000)



Source: Icelandic Tourist Board.

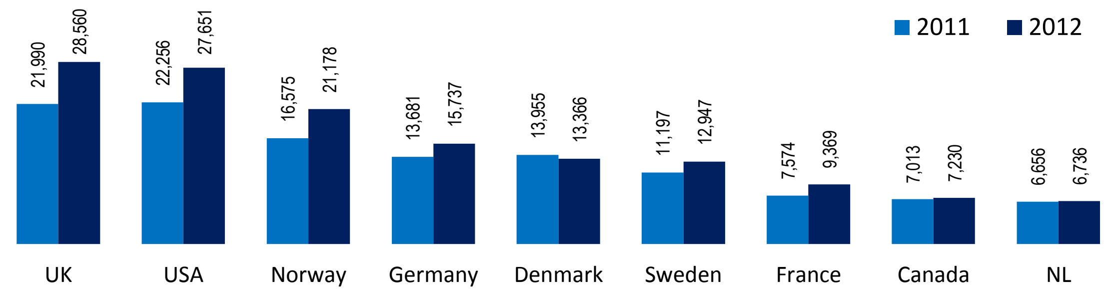
NATIONALITIES THROUGH KEFLAVÍK AIRPORT 2012/11

SPRING/AUTUMN: 192,000 visitors came during the spring or autumn in 2012, 20.4% more than in 2011. Most came from the UK (14.8%), the US (14.4%) and Norway (11.0%). Travellers from Germany (8.2%), Denmark (6.9%), Sweden (6.7%), France (4.9%), Canada (3.8%) and the Netherlands (3.5%) came thereafter. Together, these nine nations made up 70.4% of travellers during spring or autumn.

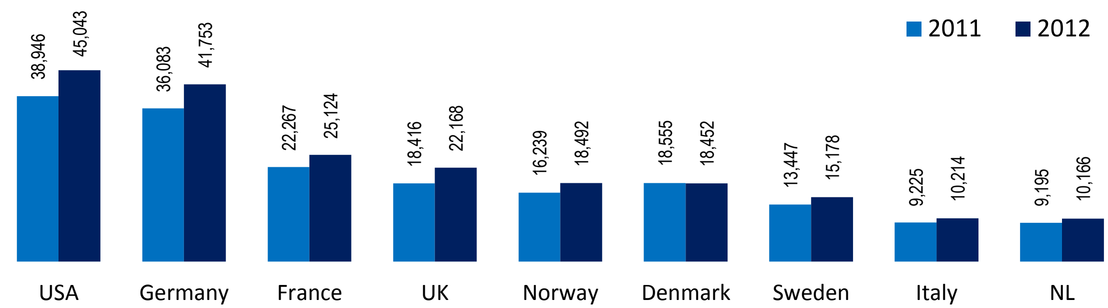
SUMMER: 302,000 came during the 2012 summer, 13.8% more than in 2011. Most summer visitors in 2012 came from the US (14.9%), Germany (13.8%), France (8.3%), the UK (7.3%), Norway (6.1%), Denmark (6.1%), Sweden (5.0%), Italy (3.4%) and the Netherlands (3.4%). In total, these nine nations comprised 68.3% of visitors in 2012.

WINTER: 153,000 visitors came in 2012, 32% more than during the 2011 winter. Broken down by nation, the largest proportion came from the UK (28.7%) and the US (14.6%). Travellers from Norway (7.8%), Denmark (6.0%), Germany (5.0%), Sweden (4.9%), France (4.6%), Japan (3.4%) and the Netherlands (2.9%) then followed. The total number of visitors from these nine nations was 77.9% of visitors during the winter in 2012.

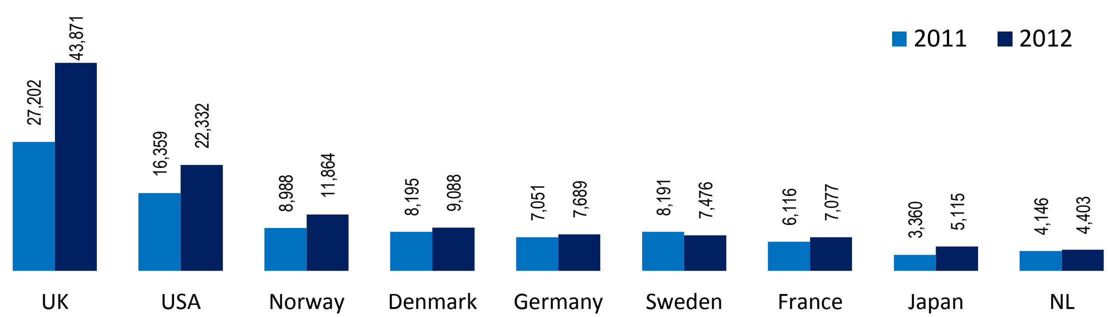
SPRING/AUTUMN



SUMMER



WINTER



Source: Icelandic Tourist Board.

DEPARTURES FROM KEFLAVÍK AIRPORT 2012

By nationality		By season*				By month											
	Total	Spring	Summer	Autumn	Winter	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Canada	18,760	3,040	9,398	4,190	2,132	361	284	455	1,294	1,746	2,698	3,048	3,652	2,488	1,702	676	356
China	14,036	1,428	6,918	2,731	2,959	449	343	376	630	798	2,093	2,408	2,417	1,651	1,080	532	1,259
Denmark	40,906	5,836	18,452	7,530	9,088	1,715	1,525	2,695	2,855	2,981	4,175	8,167	6,110	4,138	3,392	1,804	1,349
Finland	13,684	2,474	5,709	2,727	2,774	416	238	725	1,093	1,381	1,969	2,198	1,542	1,792	935	758	637
France	41,570	4,527	25,124	4,842	7,077	1,387	1,336	1,747	2,213	2,314	4,412	8,454	12,258	3,646	1,196	1,514	1,093
Germany	65,179	6,616	41,753	9,121	7,689	1,272	1,079	2,015	2,571	4,045	9,659	15,461	16,633	6,418	2,703	1,922	1,401
Italy	13,841	750	10,214	1,288	1,589	249	208	354	329	421	1,385	3,176	5,653	950	338	532	246
Japan	10,343	771	1,974	2,483	5,115	1,076	1,078	884	415	356	557	589	828	1,812	671	1,020	1,057
Netherlands	21,305	3,277	10,166	3,459	4,403	722	1,021	1,279	1,158	2,119	2,319	3,841	4,006	2,045	1,414	835	546
Norway	51,534	8,684	18,492	12,494	11,864	1,718	1,949	3,144	3,889	4,795	5,850	6,686	5,956	7,486	5,008	3,065	1,988
Poland	14,936	2,270	7,361	1,947	3,358	470	341	544	911	1,359	2,313	2,957	2,091	1,193	754	528	1,475
Russia	4,724	725	2,422	785	792	315	66	153	203	522	455	752	1,215	372	413	185	73
Spain	15,278	1,410	9,524	2,772	1,572	352	206	346	436	974	1,006	2,971	5,547	1,841	931	280	388
Sweden	35,601	6,160	15,178	6,787	7,476	1,440	1,035	1,680	2,651	3,509	3,995	6,257	4,926	4,139	2,648	2,146	1,175
Switzerland	12,838	685	9,075	2,046	1,032	252	169	230	325	360	1,461	3,918	3,696	1,025	1,021	207	174
UK	94,599	12,789	22,168	15,771	43,871	6,956	10,522	9,107	8,437	4,352	5,878	8,506	7,784	6,313	9,458	10,241	7,045
USA	95,026	11,919	45,043	15,732	22,332	3,914	3,879	4,513	4,450	7,469	14,258	14,960	15,825	9,820	5,912	6,414	3,612
Other	82,761	9,541	42,754	12,961	17,505	3,088	2,630	3,350	3,815	5,726	9,842	17,772	15,140	7,543	5,418	4,291	4,146
Total	**646,921**	**82,902**	**301,725**	**109,666**	**152,628**	**26,152**	**27,909**	**33,597**	**37,675**	**45,227**	**74,325**	**112,121**	**115,279**	**64,672**	**44,994**	**36,950**	**28,020**

By market		By season*				By month											
	Total	Spring	Summer	Autumn	Winter	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Nordic countr.	141,725	23,154	57,831	29,538	31,202	5,289	4,747	8,244	10,488	12,666	15,989	23,308	18,534	17,555	11,983	7,773	5,149
UK	94,599	12,789	22,168	15,771	43,871	6,956	10,522	9,107	8,437	4,352	5,878	8,506	7,784	6,313	9,458	10,241	7,045
Cent-/S-Europe	170,011	17,265	105,856	23,528	23,362	4,234	4,019	5,971	7,032	10,233	20,242	37,821	47,793	15,925	7,603	5,290	3,848
N-America	113,786	14,959	54,441	19,922	24,464	4,275	4,163	4,968	5,744	9,215	16,956	18,008	19,477	12,308	7,614	7,090	3,968
Other	126,800	14,735	61,429	20,907	29,729	5,398	4,458	5,307	5,974	8,761	15,260	24,478	21,691	12,571	8,336	6,556	8,010
Total	**646,921**	**82,902**	**301,725**	**109,666**	**152,628**	**26,152**	**27,909**	**33,597**	**37,675**	**45,227**	**74,325**	**112,121**	**115,279**	**64,672**	**44,994**	**36,950**	**28,020**

**Spring: April-May. Summer: June-August, Autumn: September-October, Winter: January-March/November-December.*

Source: Icelandic Tourist Board.

OVERNIGHT STAYS – ALL TYPES OF ACCOMMODATION

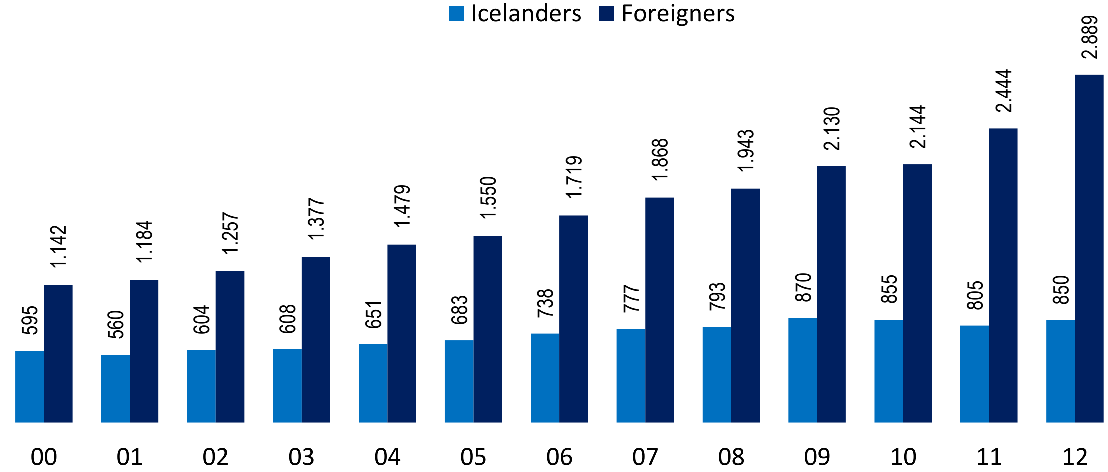
The total number of overnight stays in Iceland was 3.7m in 2012. The annual increase of overnight stays has commonly been 6.7% between years since 2000. The overnight stays of foreign visitors were around 2.9m in 2012. The increase has generally been 8.4% since 2000. Overnight stays of Icelanders were around 850,000 in 2012 and have increased by 3.1% annually since 2000.

OVERNIGHT STAYS BY SEASONS: Around 58% of the total overnight stays in 2012 were during summer, 11% during spring, 13% during autumn and 18% during winter.

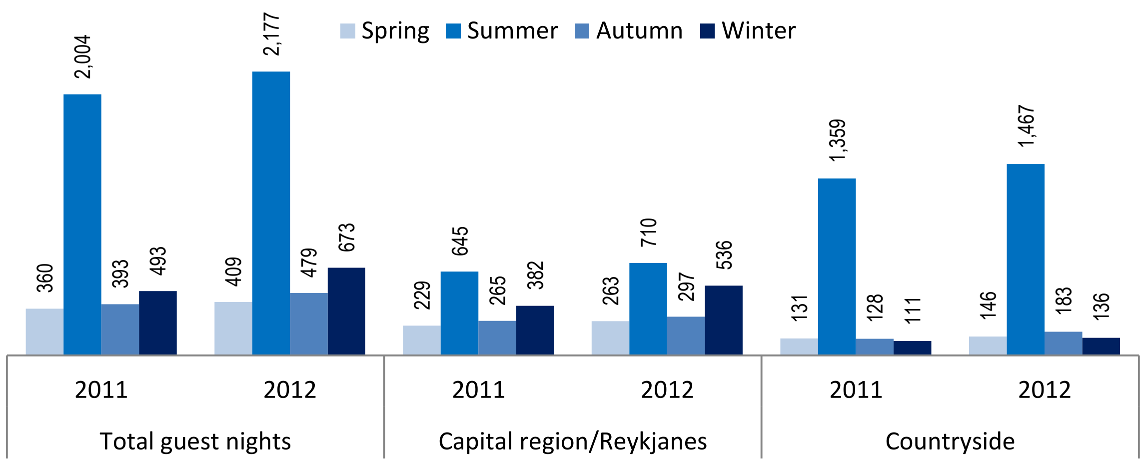
About half (48.3%) of overnight stays were in the capital area in 2012, of which two of every five were during the summer, a quarter during winter, 14.6% during spring and 16.4% during autumn. About half (51.7%) of overnight stays were spent outside the capital area and Reykjanes, of which 75.9% were during summer, 7.6% during spring, 9.4% during autumn and 7.0% during winter.

Source: Statistics Iceland
For further information on accommodation statistics, see Statistics Iceland.

OVERNIGHT STAYS IN ALL TYPES OF ACCOMMODATION 2000–2012 ('000)



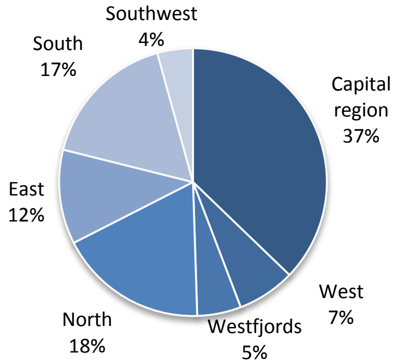
OVERNIGHT STAYS 2012/2011 ('000)



OVERNIGHT STAYS IN HOTELS/GUESTHOUSES

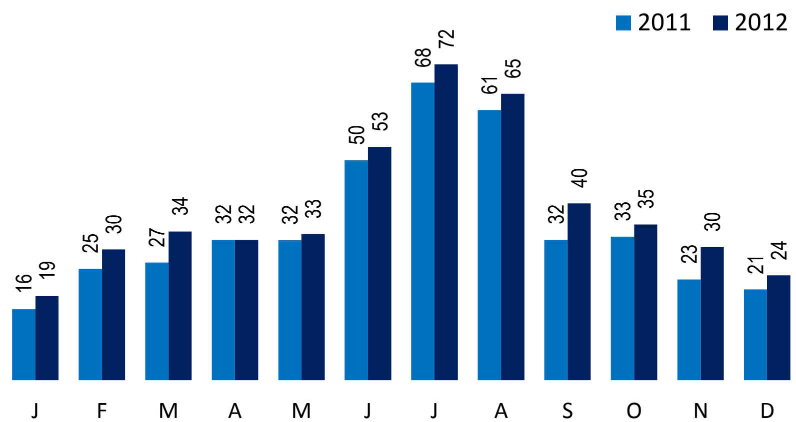
AVAILABLE BEDS IN HOTELS AND GUESTHOUSES 2012

In 2012, there were 22,525 beds available in 368 hotels and guest-houses, 6.9% more beds than in 2011.



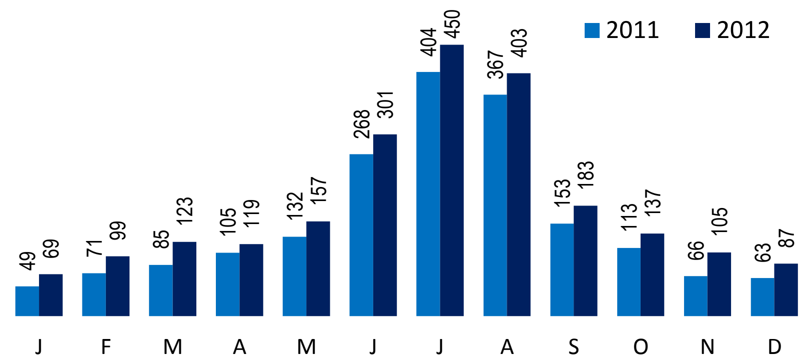
OCCUPANCY RATES IN HOTELS AND GUESTHOUSES (%)

Occupancy rates in hotels and guesthouses rose between years 2011/2012 in every month except April, when it remained the same. Use was greatest in July and August.



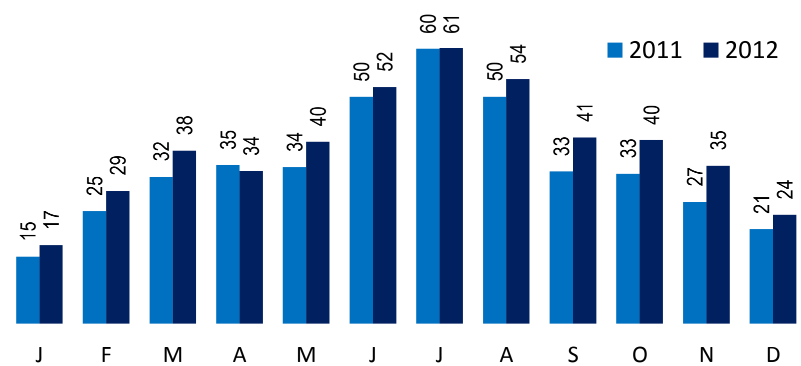
FOREIGN GUEST NIGHTS AT HOTELS AND GUESTHOUSES ('000)

International visitors spent approximately 2.2m guest nights in hotels and guesthouses, or approximately 77% of the guest nights of foreign visitors. This corresponds to 19% more guest nights than in 2012. Around 52% were spent during the summer, around 27% during spring or autumn and 22% during winter months.



DOMESTIC GUEST NIGHTS AT HOTELS AND GUESTHOUSES ('000)

Icelanders spent around 465,000 guest nights in hotels and guesthouses in Iceland in 2012, or approximately 55% of guest nights. This corresponds to 12% more guest nights than in 2011. Around 36% were spent during the summer, around 33% during spring or autumn and 31% during winter months.



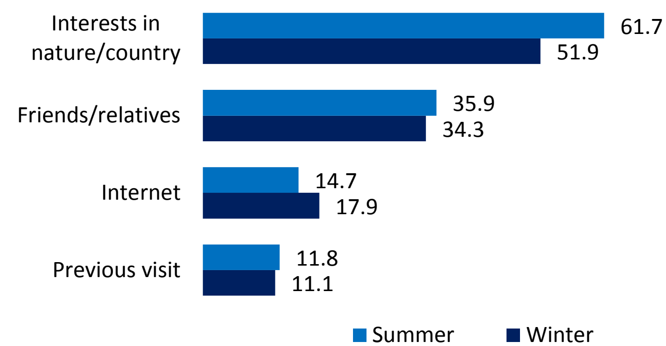
INTERNATIONAL VISITORS IN ICELAND 2011–12

The Icelandic Tourist Board asked MMR to carry out an Internet survey among international visitors in the period June 2011 to May 2012, based on e-mail addresses collected at Keflavík Airport and in Seyðisfjörður. The final sample was 8,690 people, with a response rate of 52.2%. In processing the statistics, the travel year was divided into two periods, i.e. summer (June–August) and winter (September–May). Nine demographic categories were used: gender, age, career, income, nationality, markets, type of trip, reason for trip and means of travel to Iceland.

	SUMMER	WINTER
GENDER OF RESPONDENTS		
Female	51.2%	54.3%
Male	48.8%	45.7%
AGE (average age)	39,6 yrs	40,5 yrs
34 years and younger	45.0%	44.0%
35–54 years	36.9%	35.7%
55 years and older	18.0%	20.3%
LEVEL OF TOTAL HOUSEHOLD INCOME		
Low / low average	13.9%	11.4%
Average	39.3%	41.1%
High average / high	46.8%	47.5%
RESPONDENTS BY MARKET		
Nordic countries	20.2%	26.4%
United Kingdom	8.6%	26.5%
Central/South Europe	43.8%	21.2%
North America	17.7%	17.3%
Other	9.7%	8.7%
TYPE OF TOUR		
Package trip	10.2%	17.6%
Individually arranged trip	79.6%	67.8%
Both: package trip/ind. arranged trip	10.2%	14.6%
PURPOSE OF VISIT		
Vacation/holiday	86.3%	82.7%
Conference/meeting	10.4%	9.9%
Visiting friends and relatives	6.2%	6.7%
Event in Iceland	2.9%	6.6%
Business/employment	2.8%	4.5%
Study/research	3.6%	4.4%

WHY DID THE VISITOR COME TO ICELAND (%)

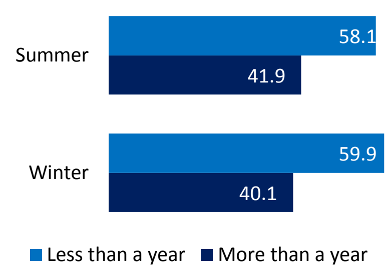
As in earlier surveys performed by the Icelandic Tourist Board, the majority of respondents mentioned interest in nature and the country when asked why they decided to come to Iceland. Many mentioned friends and relatives, the Internet and earlier visits. Other aspects had less of an influence.



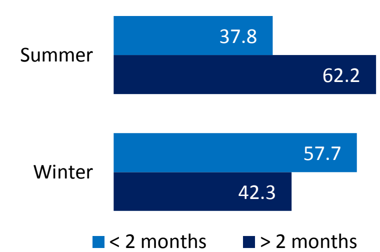
WHEN WAS THE DECISION MADE AND THE TRIP BOOKED (%)

60% of summer and winter visitors decided on visiting Iceland within one year of travelling. The time from booking to departure was less than two months in 38% of cases during summer and in 58% of cases during the winter.

IDEA FOR TRIP



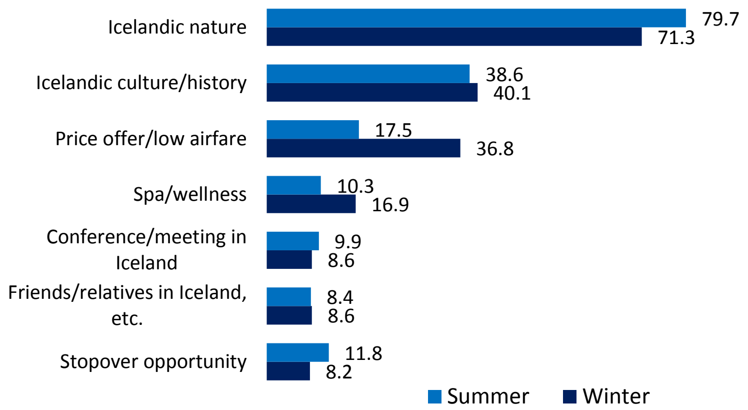
VISIT BOOKED



See survey on the [ITB website](). It consists of 70 questions on why Iceland was chosen, visitor travel behaviour, expenses and spending habits and attitudes to various aspects of Icelandic tourist services.

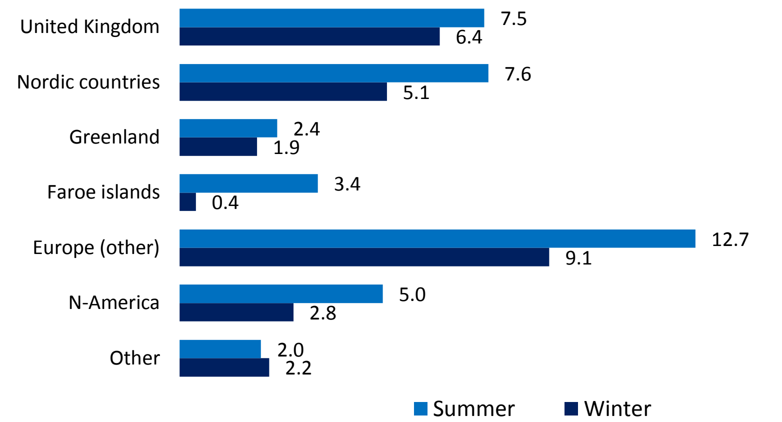
FACTORS INFLUENCING DECISION TO TRAVEL TO ICELAND (%)

The vast majority of summer and winter visitors stated that an interest in nature affected their decision to travel to Iceland. Many mentioned Icelandic culture/history. Favourable travel offers were mentioned by many winter travellers. Other reasons lagged behind.



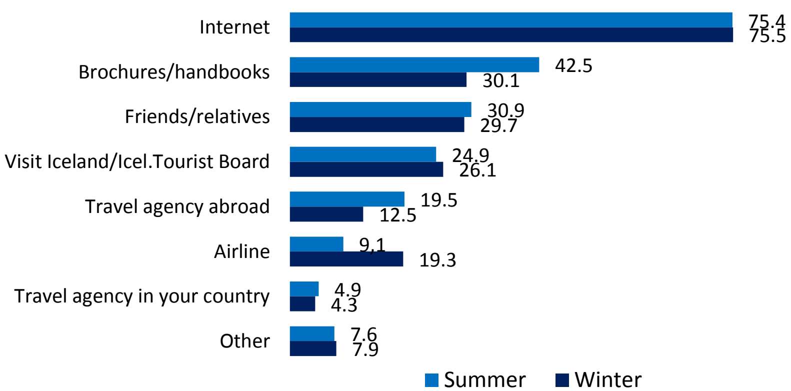
WERE OTHER COUNTRIES VISITED (%)

Approximately 70% of visitors during the summer, and around 80% during winter, visited other countries while travelling to Iceland. US citizens formed a major proportion of this number, as 56% travelled to other countries during summer and 38.6% during winter.



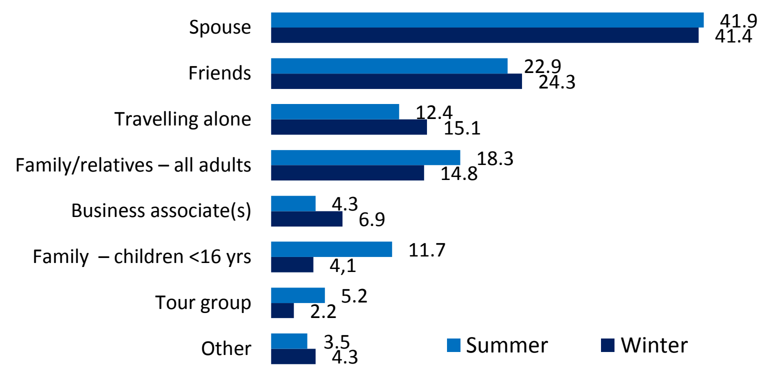
SOURCE OF INFORMATION ON ICELAND (%)

Information on Iceland was obtained from various sources. The Internet, however, was by far the most important source.



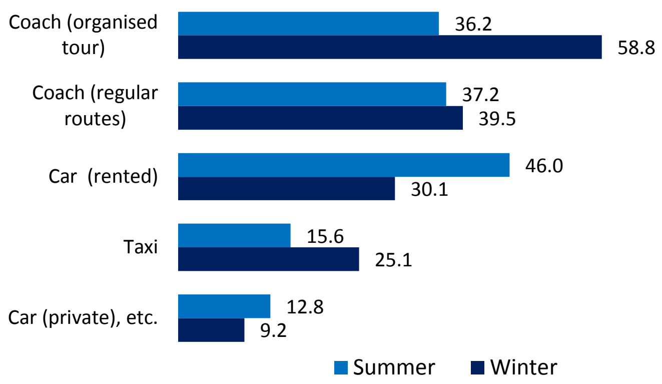
TRAVELLING COMPANION (%)

Most visitors travelled to Iceland with their spouse. Friends and family members were also common travel companions. Few travelled with a tour group or business partners.



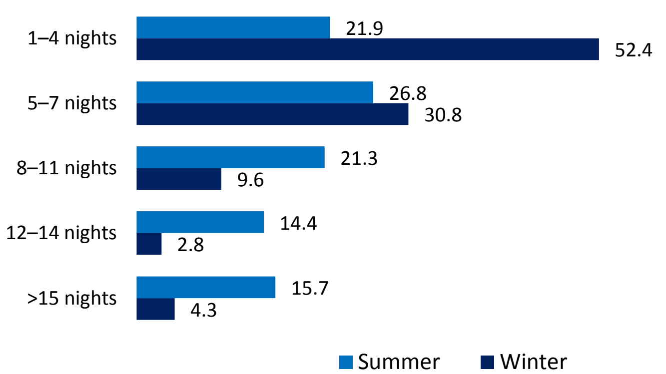
MODE OF TRAVEL (%)

Tour coaches were used extensively during the winter season. The same can be said of scheduled coaches and rental cars, although a rather larger proportion used rental cars during the summer than in the winter.



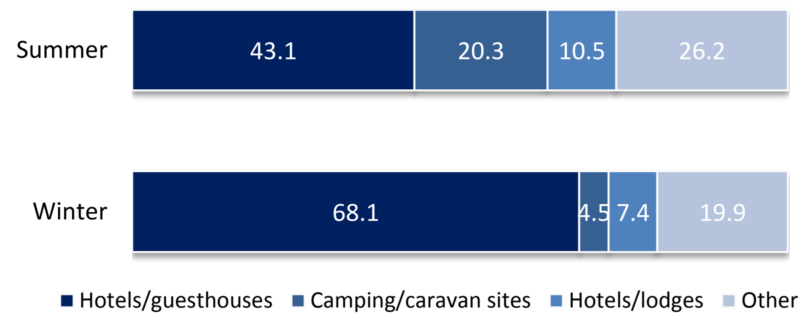
LENGTH OF STAY (%)

Foreign visitors stayed on average 10.2 nights in Iceland during summer 2011 and 6.6 nights during winter 2011–2012. Almost half of visitors during the summer spent seven nights or fewer and around half during winter spent four nights or fewer.



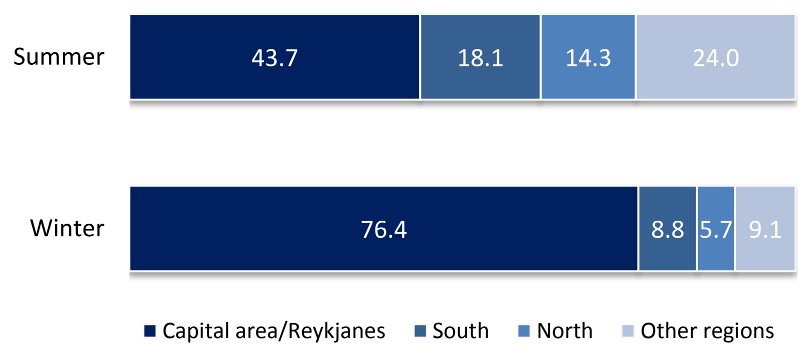
OVERNIGHT STAYS BY TYPE OF ACCOMMODATION (%)

Visitors during summer spent approximately 45% of overnight stays in hotels and guesthouses, around 20% at camping sites and around 10% in hostels or chalets. Overnight stays during winter, however, were for the most part limited to hotels and guesthouses.

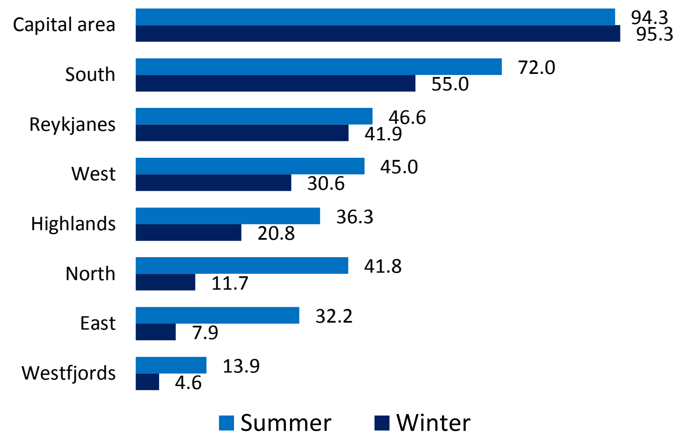


OVERNIGHT STAYS BY REGION (%)

Approximately 44% of visitor guest nights during summer were spent in the greater Reykjavík area, while the corresponding proportion during winter was 77%.



TO WHAT REGIONS AND PLACES DID VISITORS TRAVEL



MOST VISITED LOCATIONS (%)

Of the 36 locations specifically mentioned in the survey carried out by the Tourist Board, the following were most visited.

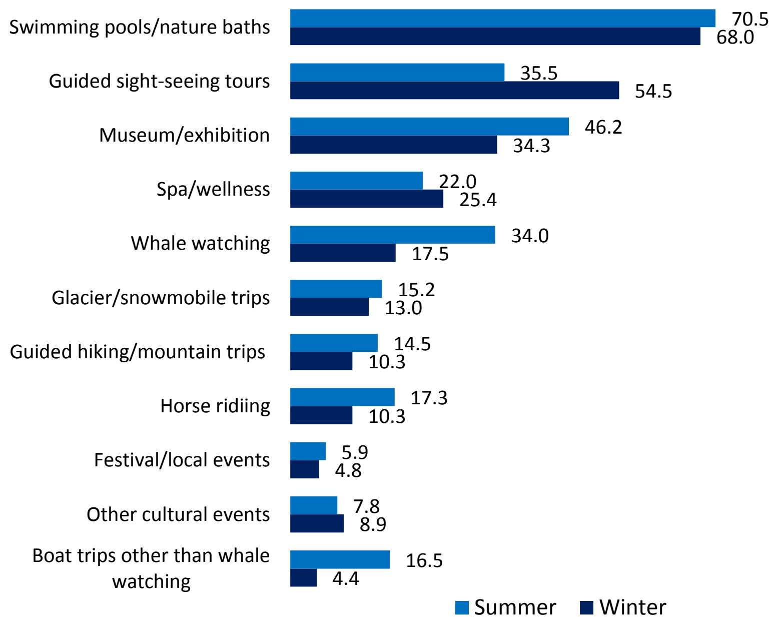
Summer:	%
1. Reykjavík	94.3
2. Þingvellir/Geysir/Gullfoss	72.0
3. Vík	52.4
4. Skaftafell	47.6
5. Skógar	45.3
6. Akureyri	42.0
7. Mývatn—region	42.0
8. Húsavík	42.1
9. Ásbyrgi/Dettifoss	32.3
10. Snæfellsnes	30.9

Winter:	%
1. Reykjavík	95.3
2. Þingvellir/Geysir/Gullfoss	61.0
3. Vík	32.6
4. Skógar	27.3
5. Skaftafell	22.8
6. Reykjanesbær	21.9
7. Snæfellsnes	20,7
8. Reykjanes lighthouse &surr.	15.1
9. Akureyri	13.7
10. Hornafjörður	13.0

		Summer	Winter
Capital area/Reykjanes	Capital area	94.3	95.3
	Reykjanesbær	21.3	21.9
	Reykjanes lighthouse and surr.	14.7	15.1
West	Snæfellsnes	30.9	20.7
	Borgarfjörður	23.7	12.6
	Stykkishólmur/Breiðafj.—Islands	18.9	7.4
	Búðardalur/Dalir	9.7	3.4
Westfjords	Ísafjörður	11.1	4.2
	Hólmavík/Strandir	8.8	2.4
	Látrabjarg	6.7	1.8
	Arnarfjörður/Dynjandi	6.6	1.6
North	Akureyri	42.2	13.7
	Mývatn	42.1	11.8
	Húsavík	32.3	7.6
	Ásbyrgi/Dettifoss	30.9	5.8
	Skagafjörður	17.6	4.8
	Hvammstangi/Hvítserkur	11.5	3.0
	Melrakkaslétta/Þórshöfn	4.0	1.6
East	Egilsstaðir/Hallormsstaður	27.5	7.3
	Seyðisfjörður	20.2	5.2
	Dúpivogur	15.5	3.3
	Neskaupsstaður/Norðfjörður	6.4	2.4
	Borgarfjörður eystri	7.6	1.9
South	Þingvellir/Geysir/Gullfoss	72.0	61.0
	Vík	52.4	32.6
	Skógar	45.3	27.3
	Skaftafell	47.6	22.8
	Hornafjörður	20.5	13.0
	Eyrarbakki	13.7	10.9
	Westmann-Islands	14.1	7.0
Highlands	Landmannalaugar	23.4	7.6
	Þórsmörk	13.5	5.1
	Kjölur/Hveravellir	12.4	4.1
	Kárahnjúkar/Snæfell	5.7	3.9
	Sprengisandur	4.8	2.4
	Herðubreiðalindir/Askja	7.2	2.2

RECREATION PURCHASED IN ICELAND (%)

Winter visitors, as well as summer visitors, were particularly interested in recreational activities involving nature experiences, health and wellbeing. Swimming and warm spring baths were the most popular among international visitors during summer and winter. A much larger proportion of visitors went on guided tours during the winter, while more visitors went on whale watching tours, boating and horse riding tours during the summer. Summer visitors, moreover, visited museums and shows to a greater extent.

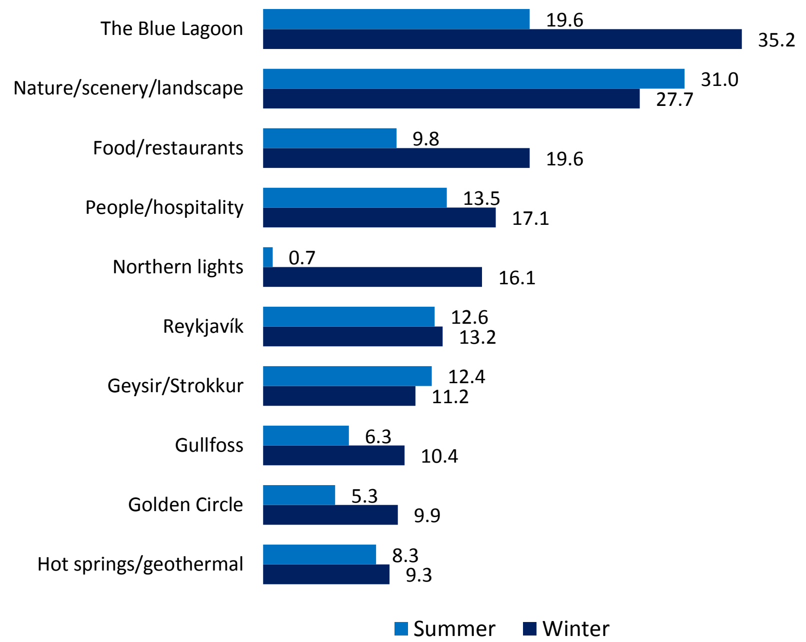


EXPENSES

Summer visitors generally paid ISK around 90,000 for their airfare/ferry ticket and winter visitors around 79,000.
Those on package tours during the summer commonly paid ISK 248,000 for the trip, while those on package tours during the winter generally paid ISK 109,000 for the trip.

MOST MEMORABLE ASPECT OF VISIT (%)

The vast majority of summer and winter visitors mentioned nature-related aspects, specific locations or nature-related recreational activities when asked what had been most memorable about Iceland. Many also mentioned the people, generous hospitality, the food and the restaurants.



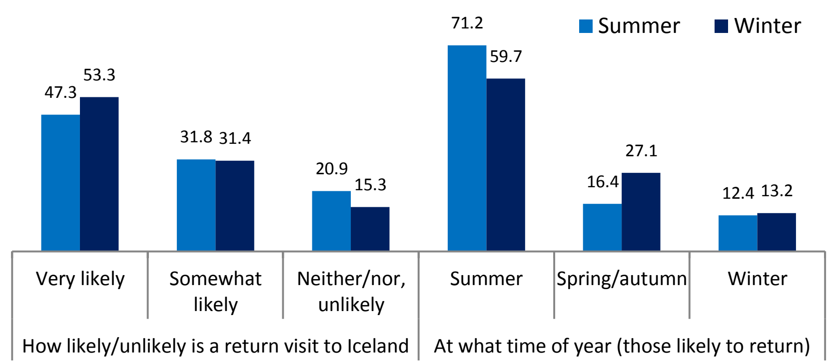
WHERE ARE ICELAND'S STRENGTHS IN THE TOURIST INDUSTRY (%)

International visitors were of the opinion that Iceland's strengths as a tourist destination are its nature, its people, hospitality and the diversity of activities on offer.

	Summer	Winter
Nature / scenery / landscape	71.6	68.3
People / hospitality	30.5	35.4
Activities / lot to do and see	12.1	12.7
Culture / history	11.2	12.5
Unique / exotic / exclusive	7.7	12.0
Tour service / excursions / guides	6.5	11.8
Food / restaurants	5.1	11.0
Organisation / professionalism	5.4	9.9
English widely spoken / other languages spoken	6.8	7.8
Service / quality	9.3	7.1
Swimming pools / nature baths / spas	5.4	7.0
Country itself	4.8	5.8
Accessibility / simplicity / infrastructure	8.5	5.7
Information / signs / info-centers	8.5	5.6
Closeness / country's location	3.0	4.1
Prices	2.6	3.9
Clean air / cleanliness of country	5.5	3.6
Transport	3.7	3.5
Not crowded / solitude / not too touristic	6.1	3.3
Geothermal activity	3.9	3.1
Unspoiled nature	4.4	2.9
Reykjavík	2.5	2.6
Relax / peace and quiet / atmosphere	4.2	2.1
Accommodation / hotels / hostels	4.2	2.0
Safety	2.1	2.0
Shopping / products / fashion	1.3	1.9
Fauna / flora	2.5	1.9
Marketing / publicity	1.5	1.5
Nightlife	0.9	1.3
Horses / riding tours	1.6	1.3
Weather	0.8	1.1

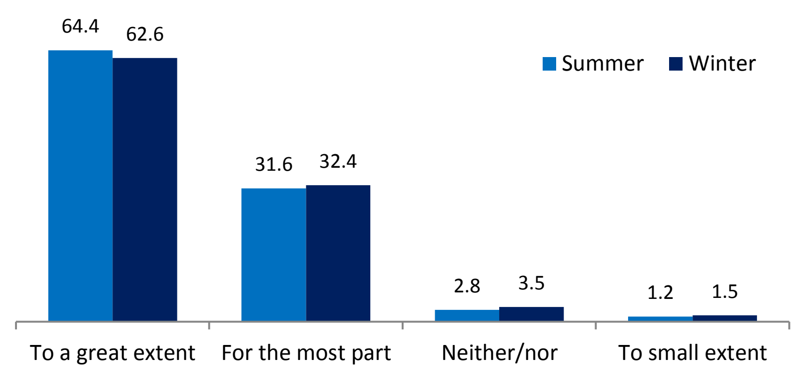
IS ANOTHER VISIT LIKELY (%)

Approximately 79% of summer visitors and 85% of winter visitors thought it likely that they would return to Iceland. Most summer visitors (71.2%) thought it likely they would come during summer while 60% of winter visitors held the same opinion. Roughly a quarter of winter visitors thought that a visit to Iceland in spring or autumn possible. There was, however, little interest in winter visits.



DID THE TRIP MEET EXPECTATIONS (%)

96% stated that the visit had met expectations to a great extent or for the most part.



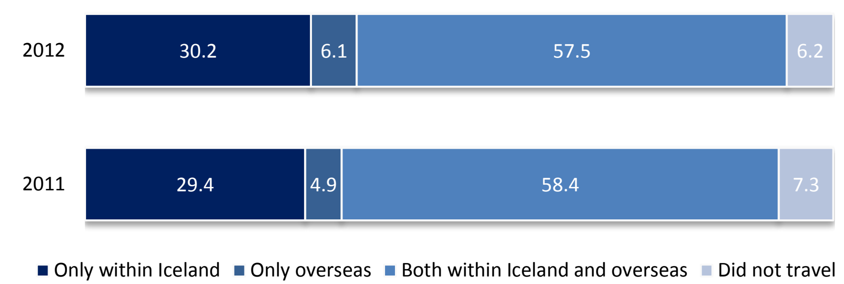
TRAVELS OF ICELANDERS 2012/2011

The Icelandic Tourist Board has carried out surveys among Icelanders as regards their travels in Iceland for a number of years. An Internet survey on the travels of Icelanders in 2012 that was carried out in February 2013 was based on a 1600-person sample. The response proportion was 60.4%. The age group between 73–80 was surveyed by phone. The sample for this group was 97 people, and the response ratio was 58.8%. The results were processed according to several demographic categories: gender, age, residence, education, employment, income and length of stay.

GENDER	2011	2012
Female	49.4%	49.4%
Male	50.6%	50.6%
AGE		
18–39 years	44.0%	44.3%
40–59 years	36.0%	36.4%
60–80 years	19.0%	19.3%
RESIDENCY		
Capital area	60.7%	59.1%
Communities near the capital area	14.4%	13.9%
Rest of Iceland	24.9%	27.0%
HOUSEHOLD INCOME (ISK)		
Under 250,000	17.2%	16.3%
250,000–399,000	22.5%	22.1%
400,000–599,000	22.0%	22.6%
600,000–799,000	16.5%	17.8%
800,000 and higher	21.8%	21.2%
JOB		
Managers and experts	32.4%	31.0%
Technicians and office workers	16.0%	17.5%
Waiters and shop assistants	10.7%	10.1%
Tradesmen & industrial specialists	6.9%	8.1%
Machinists/workers/seamen/farmers	7.5%	7.9%
Students	13.5%	13.8%
Not employed outside the home	13.1%	11.7%

WERE TRIPS UNDERTAKEN IN ICELAND OR OVERSEAS 2012 (%)

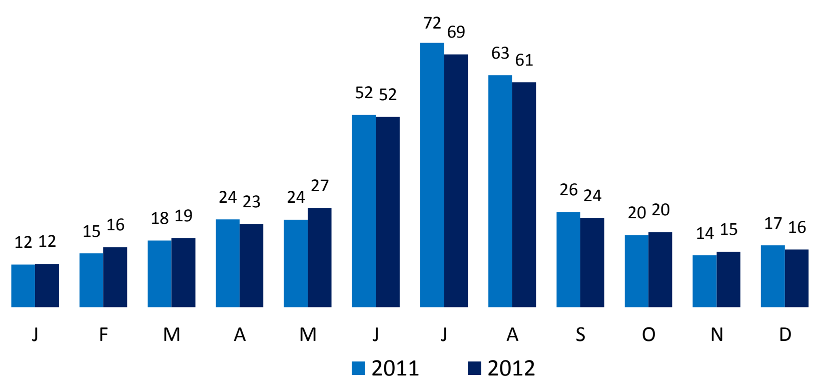
Around nine of ten Icelanders travelled in Iceland in 2012, a similar proportion as the year before. A similar number also travelled overseas in 2012 as in 2011, or approximately 63%.



- DOMESTIC TRAVELS -

IN WHICH MONTH WERE TRIPS[1] UNDERTAKEN IN ICELAND (%)

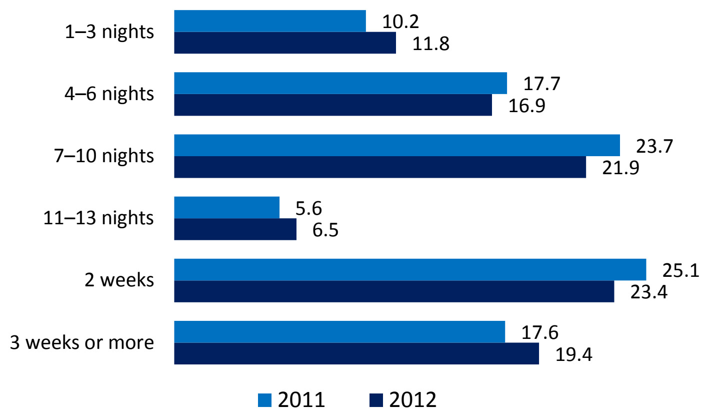
As before, July was by far the most popular month for travelling. June and August followed closely in popularity. Fewer travelled at other times.



[1] *Travel away from home and staying away for one or more nights.*

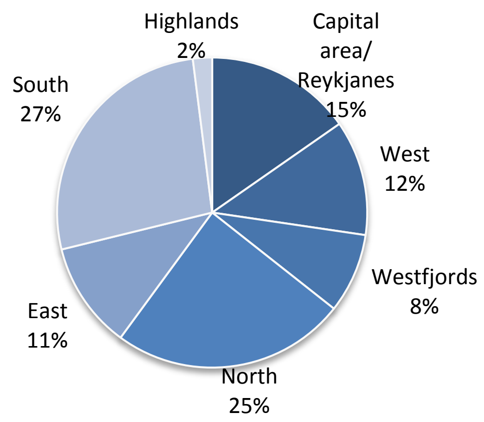
NUMBER OF OVERNIGHT STAYS IN ICELAND (%)

The average length of stay in domestic travels in 2012 was 15 nights, similar to that in 2011. Just over a quarter stayed less than a week, just over a quarter spent one to two weeks and around 43% spent two weeks or more.



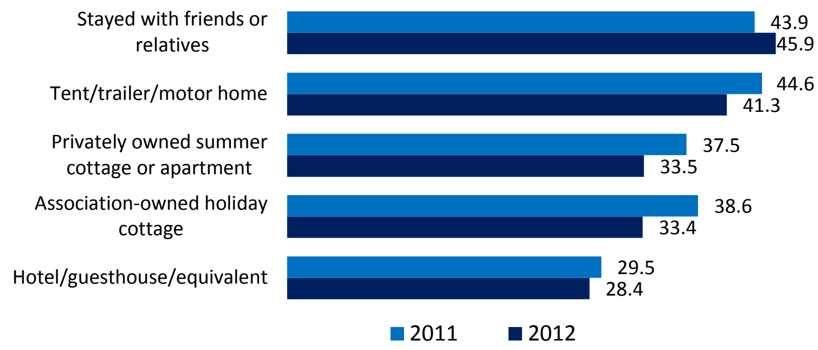
OVERNIGHT STAYS BY REGION (%)

Information on length of stay by region indicates that around half of the guest nights were spent in south and north Iceland.



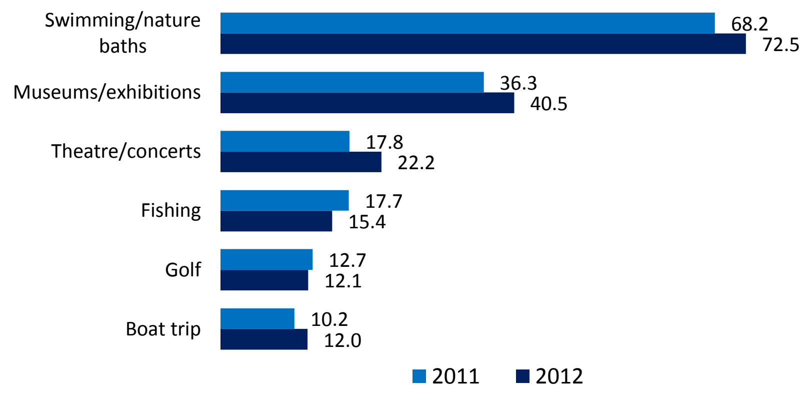
ACCOMMODATION OPTIONS USED DURING TRAVEL (%)

The majority stayed with friends and relatives or in a tent, trailer tent or motor home. Accommodation in summer cottages, apartments owned by associations and hotel rooms came thereafter.

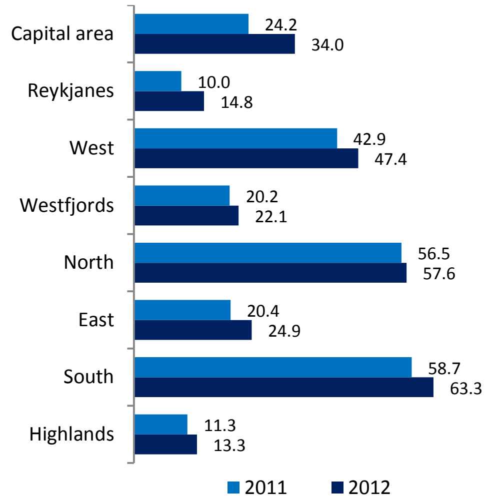


RECREATIONAL ACTIVITIES PAID FOR DURING TRAVEL (%)

Swimming and bathing in hot springs, visiting museums or exhibitions and concert or theatre tickets were the recreational options that most Icelanders paid for in domestic travel in 2012. Other recreational options, such as golf, boat trips, spa and wellness programmes, various sightseeing tours, horse riding and white-water rafting or kayaking were used to a lesser extent.



REGIONS AND PLACES VISITED BY ICELANDERS



MOST VISITED DESTINATIONS

Of the 54 locations specifically mentioned in the survey carried out by the Tourist Board, the following were most visited:

1.	Akureyri	43.1%
2.	Borgarnes	27.5%
3.	Þingvellir/Geysir/Gullfoss	26.7%
4.	Skagafjörður	2.,3%
5.	Mývatn	18.2%
6.	Siglufjörður	18.0%
7.	Egilsstaðir/Hallormsstaður	17.7%
8.	Vík	15.1%
9.	Húsavík	14.8%
10.	Westmann-Islands	14.3%

	2011	2012
Reykjanes	**10.0%**	**14.8%**
Reykjanesbær	7.6	10.1
Grindavík	4.1	6.6
Reykjanes lighthouse & surr.	2.3	4.3
Krísuvík	2.2	4.1
The Blue Lagoon*	-	3.5
Sandgerði*	-	3.3
West	**42.9%**	**47.4%**
Borgarnes**	-	27.5
Stykkishólmur	13.4	13.9
Hvalfjörður	13.1	12.6
Akranes**	-	12.4
Húsafell/Reykholt	13.5	11.7
Dalir	9.7	11.6
Snæfellsnes National Park	9.1	10.3
Westfjords	**20.2%**	**22.1%**
Ísafjörður	14.0	13.6
Hólmavík/Strandir	8.9	9.5
Patreksfjörður*	-	5.6
Látrabjarg	2.8	2.8
Hornstrandir	2.0	2.6
Hrafnseyri	3.5	2.5
Djúpuvík*	-	2.4
Flatey/Breiðafjörður	1.3	1.8
North	**56.5%**	**57.6%**
Akureyri	41.8	43.1
Skagafjörður	22.1	20.3
Mývatn	16.4	18.2
Siglufjörður	17.7	18.0
Húsavík	15.9	14.8
Hvammstangi	7.3	9.2
Ásbyrgi	8.0	8.8
Dettifoss*	-	7.8
Þórshöfn	3.8	3.2

	2011	2012
East	**20.4%**	**24.9%**
Egilsstaðir/Hallormsstaður	14.5	17.7
Djúpivogur	5.5	7.5
Eskifjörður*	-	7.5
Seyðisfjörður	4.3	7.5
Stöðvarfjörður*	-	5.3
Borgarfjörður eystri	3.3	4.8
Vopnafjörður	4.6	4.3
South	**58.7%**	**63.3%**
Þingvellir/Geysir/Gullfoss	27.8	26.7
Vík	12.1	15.1
Westmann-Islands	12.1	14.3
Kirkjubæjarklaustur	9.8	13.7
Eyrarbakki	11.8	13.3
Skógar	9.7	11.6
Jökulsárlón*	-	11.3
Hornafjörður	7.9	10.2
Skaftafell	5.3	7.8
Þórsmörk	5.0	6.5
Highlands	**11.3%**	**13.3%**
Landmannalaugar	5.0	5.0
Kjölur (incl. Hveravellir)	3.8	4.3
Sprengisandur	2.0	2.9
Herðubreiðalindir/Askja	1.2	1.6
Lakagígar	0.8	0.9
Kverkfjöll	0.6	0.8
Kárahnjúkar	1.1	0.8

**Location not asked in 2011.*

***Akranes/Borgarnes previously together.*

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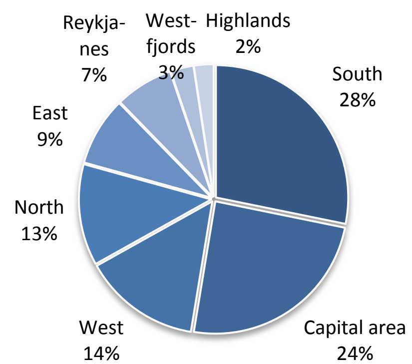
- DOMESTIC DAY TRIPS -

DAY TRIPS IN 2012 (%)

66.8% went on day trips[1] in 2012, commonly going on eight trips. Based on the results of the number of daytrips by region, approximately 53% of trips were undertaken in south Iceland and the greater Reykjavík area.



[1]*Recreational trip lasting at least 5 hours and spent away from the home without staying overnight.*

WHAT LOCATIONS WERE VISITED ON DAY TRIPS IN 2012 (%)

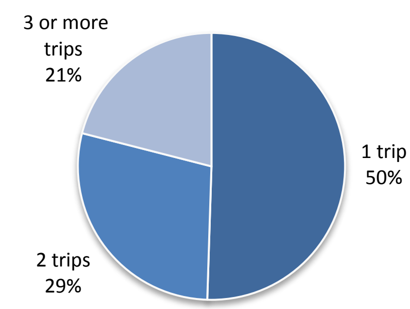
Of the 54 regions or locations asked about in various part of Iceland, the following ten were most often visited.

1. Þingvellir/Gullfoss/Geysir	28.0%
2. Borgarnes	17.1%
3. Eyrarbakki	16.8%
4. Reykjanesbær	15.1%
5. Grindavík	12.7%
6. Akureyri	12.4%
7. Akranes	10.5%
8. Westmann-Islands	10.4%
9. Hvalfjörður	10.4%
10. The Blue Lagoon	9.3%

- OVERSEAS TRIPS -

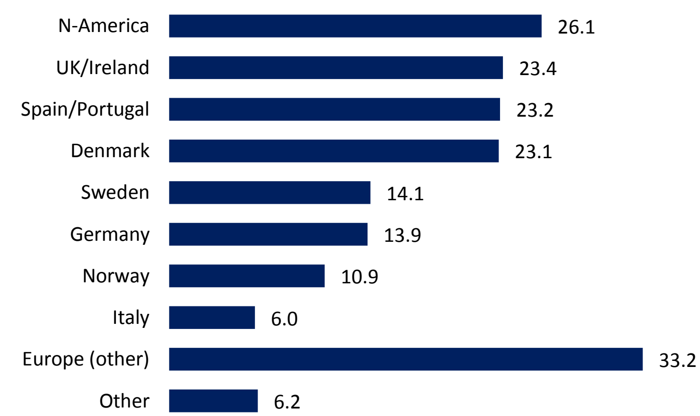
WERE OVERSEAS TRIPS TAKEN IN 2012 (%)

63.3% went on overseas trips in 2012, commonly going on two trips. Half took one trip, 29% took two trips and 21% took three or more trips.



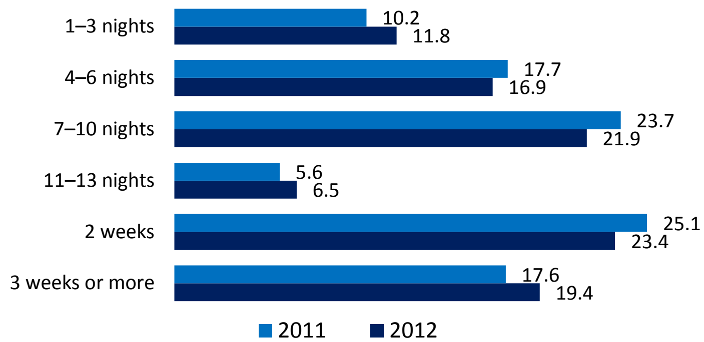
WHAT COUNTRIES WERE VISITED IN 2012 (%)

Travels of Icelanders were largely limited to Scandinavia, the UK, Spain, Portugal and North America.



NUMBER OF GUEST NIGHTS OVERSEAS IN 2012 (%)

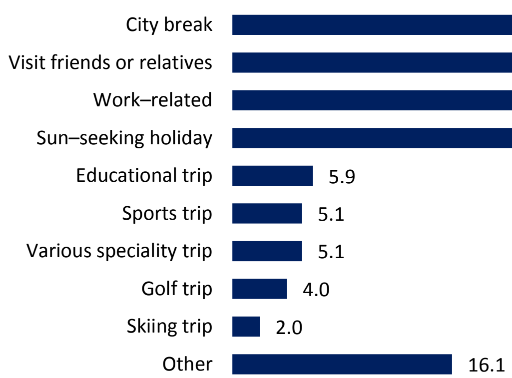
The average length of stay during travel overseas in 2012 was 15.9 nights[1].



[1]*Those staying longer than 100 nights were not included in the data.*

WHAT TYPE OF OVERSEAS TRAVEL WAS UNDERTAKEN (%)

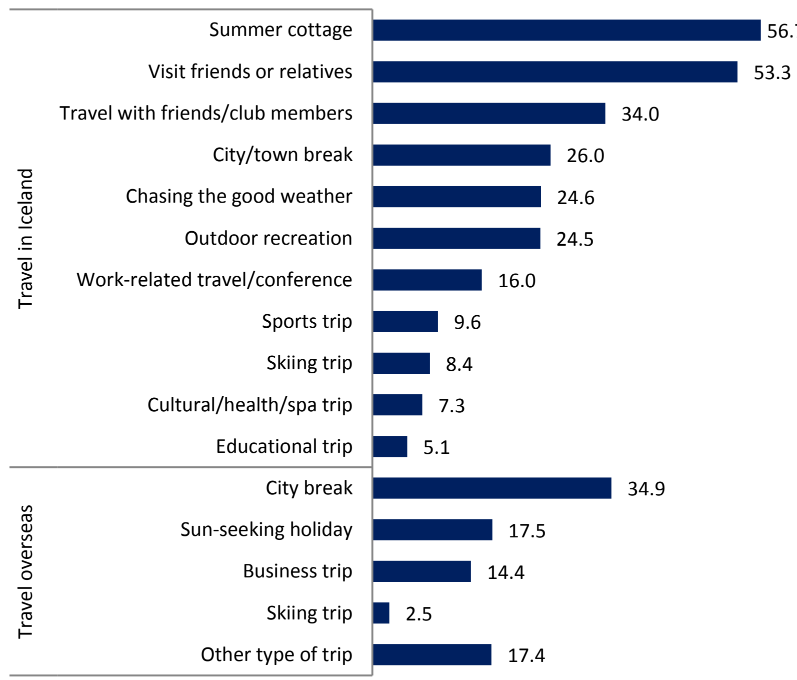
The majority went on a city or town break overseas, a visit to friends or relatives, a work-related trip and sun-seeking holidays.



- ICELANDERS' TRAVEL PLANS -

WHAT KIND OF TRIPS ARE PLANNED FOR 2012 (%)

Around 90% of Icelanders said they have plans for travel in 2013. Of these, 57% say they intend to spend time in a summer cottage in Iceland, 53% intend to visit friends or family, 35% intend to take a city break overseas, 34% intend to travel in Iceland with a group of friends or with a club, 26% intend to take a city or town break in Iceland and around 24% intend to go wherever there is good weather or to go on an outdoor recreation trip of some type.



Survey among Icelanders may be found on the ITB website.