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TOURISM IN ICELAND IN FIGURES, APRIL 2012

REPORT BY: ODDNÝ ÞÓRA ÓLADÓTTIR

TOURISM IN ICELAND IN FIGURES

-CONTENTS-

	Page
ECONOMIC STATISTICS IN ICELANDIC TOURISM	2
INTERNATIONAL VISITORS TO ICELAND 2000-11	3
INTERNATIONAL VISITORS TO ICELAND 2011 VS 2010	4
INTERNATIONAL VISITORS BY SEASON	5
MAIN NATIONALITIES THROUGH KEFLAVÍK AIRPORT 2011	6
DEPARTURES FROM KEFLAVÍK AIRPORT 2011 BY SEASONS AND MONTHS	7
OVERNIGHT STAYS – ALL TYPES OF ACCOMMODATION	8
OVERNIGHT STAYS IN HOTELS / GUESTHOUSES	9
INTERNATIONAL VISITORS SUMMER 2011	10-15
TRAVELS OF ICELANDERS 2011	16-19

ECONOMIC STATISTICS IN ICELANDIC TOURISM

VALUE OUTPUT OF TOURISM

The total value output of the tourism industry was over ISK 209bn in 2009 whereof domestic output was just under ISK 184 bn.

THE SHARE OF TOURISM IN ICELANDS'S GDP

In 2009, the share of tourism in Iceland's GDP was 5.9%, while in 2008 it was 4.6%.

THE SHARE OF TOURISM IN EXPORT REVENUE

Since 2008, the proportion of tourism in Iceland in total export revenue has been around 14%. When the activities of Icelandic tourism companies outside Iceland are included, the proportion increases to over 19% of exported goods and services during the same period.

TAXES ON TOURISM

Goods and service taxes from tourism related activities amounted to over ISK 13bn in 2009.

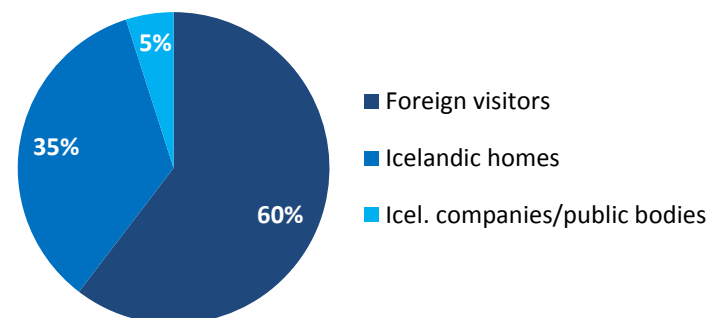
EMPLOYMENT IN TOURISM

There were 8,500 jobs in tourism in 2009, or 5.2% of the total number of jobs in Iceland. The number of jobs in characteristic tourism sectors – accommodation and catering services, passenger transport and travel agencies was 5,350, and the number of related sectors, such as retail, entertainment, culture, leisure activities, shops and services relating to passenger transport, was 3,200.

Source: Statistics Iceland.

For further information on economic statistics, see [Tourism satellite accounts](#).

DOMESTIC PURCHASE OF TRAVEL SERVICES 2009



The total travel consumption in Iceland in 2009 was just under ISK 184bn. International visitors spent ISK 111bn or 60.6% of domestic travel consumption. Icelanders spent approx. ISK 72bn, or over 39.4% of tourism consumption. Thereof, the expenditures paid by Icelandic homes amounted to ISK 64bn, or 35% 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 111bn to ISK 158bn.

TOURISM CONSUMPTION OF FOREIGN VISITORS

International visitors spent approximately ISK 133bn in 2011 or approximately 13% more than in 2010.

	Travel consumption ISK bn. ¹	Average spent per person	Average spent per day ²	Average spent per day traveller
2010	117,660	237,807	33,852	12,410
2011	132,688	234,593	33,394	-

¹At the price level of each year, airline fares included.

² Average length of stay based on 7.0 nights.

INTERNATIONAL VISITORS TO ICELAND 2000-11

International visitors to Iceland have almost doubled since 2000. They were around 300,000 in 2000. Their number had risen to 565,000 by 2011. The annual increase has been around 6.1% annually since 2000. If this trend continues we may expect 1 million visitors to Iceland by 2020.

Number of visitors		Increase/decrease	
2000	302,900	'00 - '01	-2.3%
2001	296,000	'01 - '02	-6.1%
2002	277,900	'02 - '03	15.1%
2003	320,000	'03 - '04	12.6%
2004	360,400	'04 - '05	3.8%
2005	374,100	'05 - '06	12.9%
2006	422,300	'06 - '07	14.9%
2007	485,000	'07 - '08	3.5%
2008	502,000	'08 - '09	-1.6%
2009	493,900	'09 - '10	-1.1%
2010	488,600	'10 - '11	15.7%
2011	565,600	'00 - '11	6.1%

INTERNATIONAL CRUISE SHIP PASSENGERS

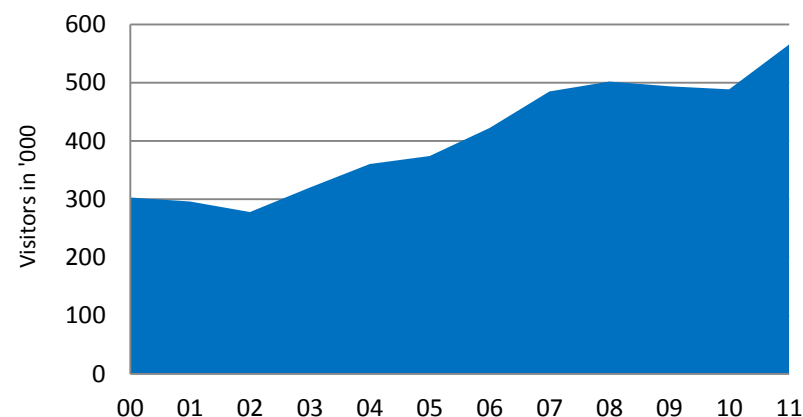
Since 2000, cruise ship passengers to Iceland have increased significantly, from 27,000 passengers in 2000 to 66,000 in 2011. The increase has been around 9.3% per year.

	Number of vessels		No. of passengers	
	2010	2011	2010	2011
Reykjavík ¹	74	67	70,133	62,673
Akureyri	58	56	55,734	49,475
Ísafjörður	28	31	16,790	21,000
Grundarfjörður	13	14	5,088	5,674
Vestmannaeyjar	19	17	4,204	5,087
Seyðisfjörður etc. ²	8	10	3,376	4,974

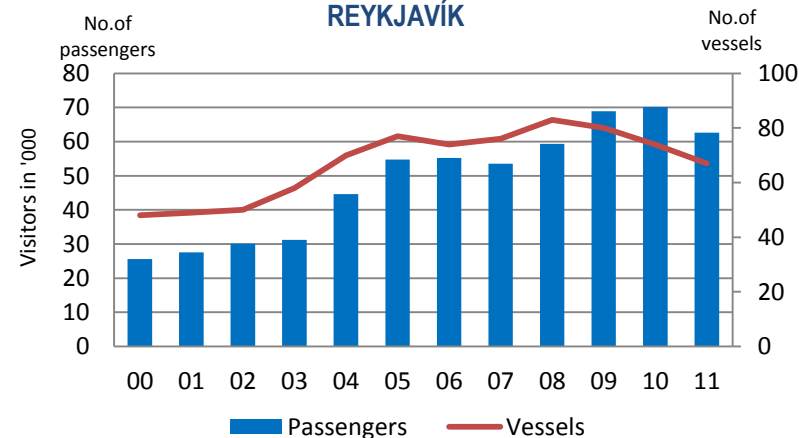
¹Approximately 95% of the cruise ships that visit Iceland berth in Reykjavík.

²In 2011, 2,437 passengers came to Djúpvogur and 264 to Húsavík.

VISITORS TO ICELAND 2000-2011



INTERNATIONAL CRUISE SHIP PASSENGERS TO REYKJAVÍK



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

INTERNATIONAL VISITORS TO ICELAND 2011 VS 2010

The total number of foreign visitors was just under 566,000 in 2011, a 15.8% increase from 2010 when foreign visitors numbered just under 489,000.

The majority came by air through Keflavík Airport (95.6%), 2.2% came with Norræna through Seyðisfjörður and 2.2% 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 from assessments based on sales and passenger figures.

Just under 541,000 visitors came to Iceland through Keflavík Airport in 2011, 17.8% more than in 2010. Visitor departures from Keflavík Airport broke records in all months except March, when a similar number passed through as in 2010.

INTERNATIONAL VISITORS BY POINT OF ENTRY

	2010	2011	Increase/decrease	
			Number	%
Keflavík airport	459,252	540,824	81,572	17.8
Seyðisfjörður seaport	15,336	12,505	-2,831	-18.5
Other airports	14,034	12,282	-1,752	-12.5
Total	488,622	565,611	76,989	15.7

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 Norræna based on sales figures.

-Isavia estimates visitor numbers through other airports based on passenger and sales figures.

VISITORS THROUGH KEFLAVÍK AIRPORT

BY NATIONALITY	2010	2011	Increase/decrease 2010-11	
			Number	%
Canada	13,447	17,929	4,482	33.3
China	5,194	8,784	3,590	69.1
Denmark	38,139	40,705	2,566	6.7
Finland	11,012	12,031	1,019	9.3
France	29,255	35,957	6,702	22.9
Germany	54,377	56,815	2,438	4.5
Italy	9,692	12,346	2,654	27.4
Japan	5,580	6,902	1,322	23.7
Netherlands	17,281	19,997	2,716	15.7
Norway	35,662	41,802	6,140	17.2
Spain	12,237	13,971	1,734	14.2
Sweden	27,944	32,835	4,891	17.5
Switzerland	9,163	10,155	992	10.8
United Kingdom	60,326	67,608	7,282	12.1
USA	51,166	77,561	26,395	51.6
Other	78,777	85,426	6,649	8.4
Total	459,252	540,824	81,572	17.8
BY MARKET AREA				
Nordic countries	112,757	127,373	14,616	13.0
United Kingdom	60,326	67,608	7,282	12.1
Central-/S-Europe	132,005	149,241	17,236	13.1
N-America	64,613	95,490	30,877	47.8
Other	89,551	101,112	11,561	12.9
Total	459,252	540,824	81,572	17.8

VISITORS THROUGH SEYÐISFJÖRÐUR SEAPORT

BY MARKET AREA	2010	2011	Increase/decrease 2010-11	
			Number	%
Nordic countries	4,867	3,352	-1,515	-31.1
Europe	8,868	7,850	-1,018	-11.5
Other	1,764	1,303	-461	-26.1
Total	15,499	12,505	-2,994	-19.3

INTERNATIONAL VISITORS BY SEASON

Just under half the visitors in 2011 came during the three summer months (June-Aug), as was the case in 2010. Just under a third came in spring (Apr-May) or in the autumn (Sept-Oct) and around a fifth during winter (Jan-Mar/Nov-Dec).

VISITORS BY SEASON – PROPORTIONAL DISTRIBUTION

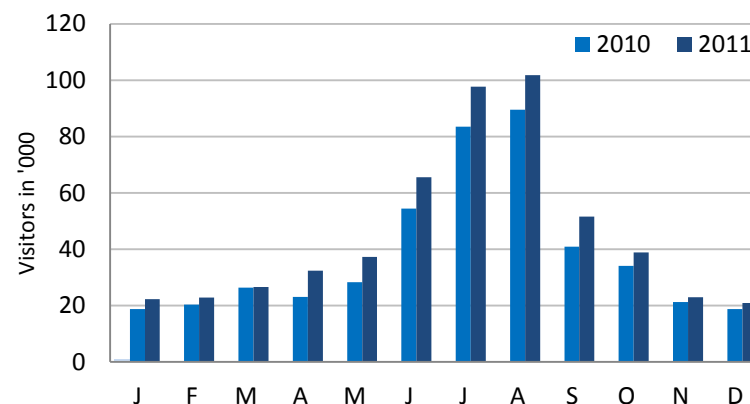
	Proportional distribution (%)	
	2010	2011
Spring	11.2	12.9
Summer	49.5	49.0
Autumn	16.3	16.7
Winter	23.0	21.4
Total	100	100

Around 63% of visitors from central and south Europe came during the summer in 2011, approx. 50% of US citizens, 42% of guests from the Nordic countries, 27% from the UK and 50% from elsewhere. Just over a third of guests from the Nordic countries came during spring and autumn, as did a third of UK citizens and similar proportions of US citizens. Around 40% of UK citizens came during winter. Citizens of other market areas were few during the winter months.

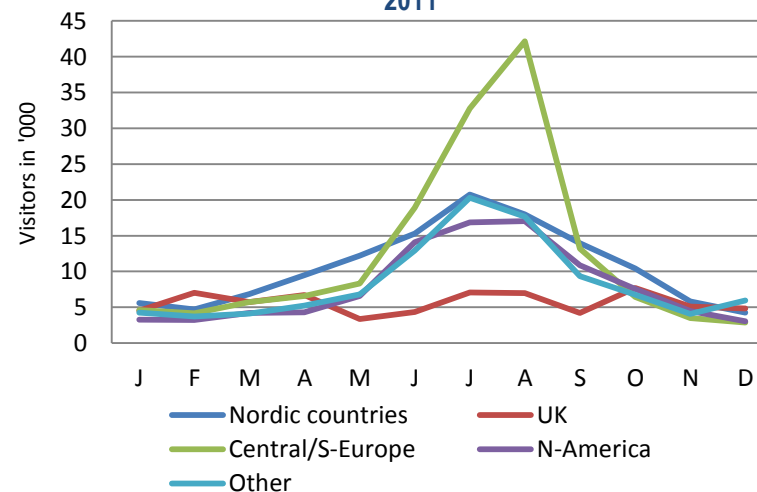
MARKETS ACCORDING TO SEASONS IN 2011

	Proportional distribution (%)				Total
	Spring	Summer	Autumn	Winter	
Nordic countries	17.0	42.4	19.1	21.4	100
United Kingdom	14.9	27.2	17.6	40.2	100
Central-/S-Europe	10.0	62.9	13.1	14.0	100
N-America	11.4	50.3	19.3	19.1	100
Other	11.9	50.3	15.9	21.9	100
Total	12.9	49.0	16.7	21.4	100

DEPARTURES FROM KEFLAVÍK AIRPORT BY MONTH



DEPARTURES FROM KEFLAVÍK AIRPORT BY MARKET 2011



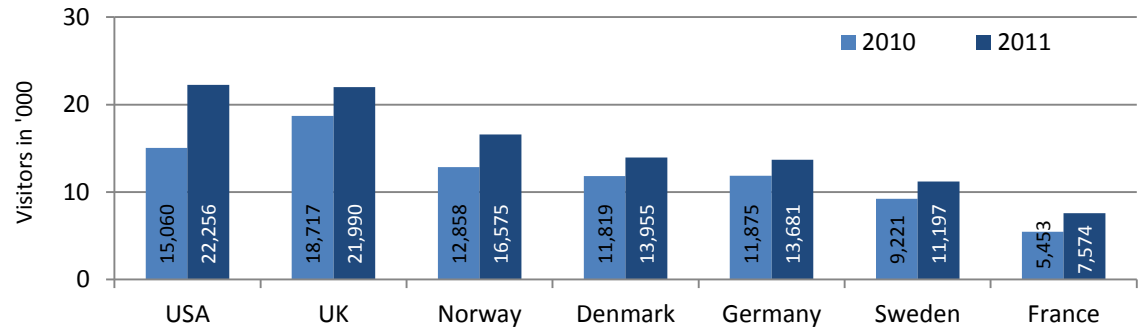
MAIN NATIONALITIES THROUGH KEFLAVIK AIRPORT 2011

SPRING/AUTUMN: 160,000 visitors came during the spring or autumn in 2011, 26.6% more than in 2010. Most came from the US (13.9%), the UK (13.7%) and Norway (10.4%). Travellers from Denmark (8.7%), Germany (8.6%), Sweden (7.0%) and France (4.7) came thereafter. Together these nations made up 67.0% of travellers during spring or autumn.

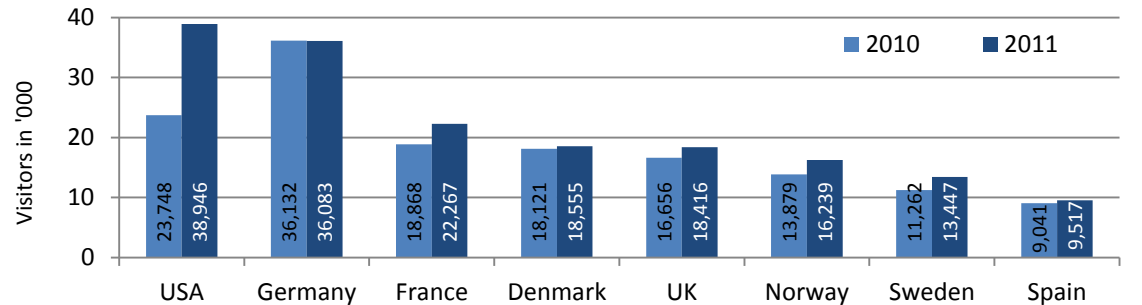
SUMMER: 265,000 came during the 2011 summer, 16.6% more than in 2010. Most summer visitors in 2011 came from the US (14.7%), Germany (13.6%), France (8.4%), Denmark (7.0%), the UK (6.9%), Norway (6.1%), Sweden (5.1%) and Spain (3.6%). In total, these seven nations were 65.4% of visitors in 2011.

WINTER: Approx. 116,000 visitors came in 2011, 9.6% more than during the 2010 winter. Broken down by nation, the largest proportion came from the UK (23.5%) and the US (14.1%). Travellers from Norway (7.8%), Denmark (7.1%), Sweden (7.1%), Germany (6.1%) and France (5.3%) then followed. The total number of visitors from these seven nations were 71.9% of visitors during the winter in 2011.

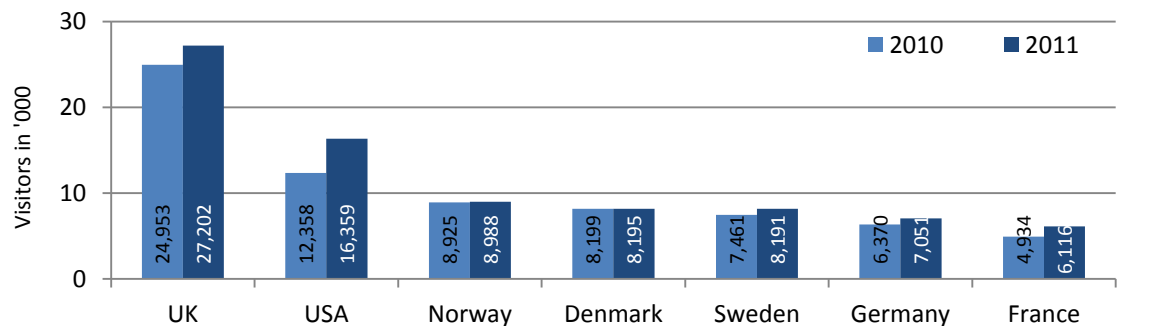
SPRING/AUTUMN



SUMMER



WINTER



DEPARTURES FROM KEFLAVÍK AIRPORT 2011 BY SEASONS AND MONTHS

BY NATIONALITY		BY SEASON*				BY MONTH											
Total	Spring	Summer	Autumn	Winter	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Canada	17,929	2,420	9,077	4,593	1,839	352	343	485	977	1,443	2,513	3,332	3,232	2,594	1,999	349	310
China	8,784	1,071	4,256	1,752	1,705	183	217	239	420	651	1,389	1,544	1,323	1,115	637	373	693
Denmark	40,705	6,611	18,555	7,344	8,195	1,625	1,472	2,208	3,175	3,436	4,532	7,996	6,027	3,894	3,450	1,574	1,316
Finland	12,031	2,185	5,811	2,174	1,861	443	228	339	937	1,248	1,467	2,318	2,026	1,395	779	383	468
France	35,957	3,573	22,267	4,001	6,116	1,451	1,268	1,582	1,836	1,737	3,946	7,945	10,376	2,403	1,598	993	822
Germany	56,815	5,560	36,083	8,121	7,051	1,538	1,310	2,133	2,496	3,064	9,584	12,498	14,001	5,891	2,230	1,122	948
Italy	12,346	731	9,225	1,098	1,292	301	216	247	327	404	1,251	2,260	5,714	796	302	323	205
Japan	6,902	488	1,874	1,180	3,360	835	712	589	228	260	590	543	741	645	535	526	698
Netherlands	19,997	3,155	9,195	3,501	4,146	698	969	1,191	1,216	1,939	2,178	3,398	3,619	2,026	1,475	751	537
Norway	41,802	7,568	16,239	9,007	8,988	1,506	1,799	2,289	3,008	4,560	5,294	5,552	5,393	5,260	3,747	2,099	1,295
Poland	14,239	2,331	7,010	1,586	3,312	521	475	421	939	1,392	2,136	2,839	2,035	953	633	492	1,403
Russia	2,597	315	1,245	458	579	237	81	94	130	185	254	547	444	242	216	95	72
Spain	13,971	1,335	9,517	1,724	1,395	301	258	410	505	830	999	3,017	5,501	1,239	485	187	239
Sweden	32,835	5,334	13,447	5,863	8,191	2,033	1,185	2,015	2,381	2,953	4,018	4,893	4,536	3,423	2,440	1,766	1,192
Switzerland	10,155	511	7,562	1,177	905	315	152	170	186	325	946	3,659	2,957	841	336	139	129
UK	67,608	10,097	18,416	11,893	27,202	4,526	7,033	5,719	6,722	3,375	4,360	7,059	6,997	4,190	7,703	5,090	4,834
USA	77,561	8,435	38,946	13,821	16,359	2,909	2,900	3,710	3,318	5,117	11,580	13,545	13,821	8,272	5,549	4,108	2,732
Other	68,590	7,825	36,479	11,119	13,167	2,488	2,231	2,783	3,532	4,293	8,569	14,812	13,098	6,397	4,722	2,599	3,066
Total	540,824	69,545	265,204	90,412	115,663	22,262	22,849	26,624	32,333	37,212	65,606	97,757	101,841	51,576	38,836	22,969	20,959

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.	127,373	21,698	54,052	24,388	27,235	5,607	4,684	6,851	9,501	12,197	15,311	20,759	17,982	13,972	10,416	5,822	4,271
UK	67,608	10,097	18,416	11,893	27,202	4,526	7,033	5,719	6,722	3,375	4,360	7,059	6,997	4,190	7,703	5,090	4,834
Cent/S-Europe	149,241	14,865	93,849	19,622	20,905	4,604	4,173	5,733	6,566	8,299	18,904	32,777	42,168	13,196	6,426	3,515	2,880
N-America	95,490	10,855	48,023	18,414	18,198	3,261	3,243	4,195	4,295	6,560	14,093	16,877	17,053	10,866	7,548	4,457	3,042
Other	101,112	12,030	50,864	16,095	22,123	4,264	3,716	4,126	5,249	6,781	12,938	20,285	17,641	9,352	6,743	4,085	5,932
Total	540,824	69,545	265,204	90,412	115,663	22,262	22,849	26,624	32,333	37,212	65,606	97,757	101,841	51,576	38,836	22,969	20,959

*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 3.3m in 2011, almost twice as many as in 2000. The annual increase of overnight stays has commonly been 5.9% between years since 2000. The overnight stays of foreign visitors were approx. 2.4m. The increase has generally been 7.2% annually since 2000. Overnight stays of Icelanders were around 800,000 in 2011 and have increased by 2.9% annually since 2000.

OVERNIGHT STAYS BY SEASONS: Around 61% of the total overnight stays were during summer, 11.1% during spring, 12.1% during autumn and 15.3% during winter.

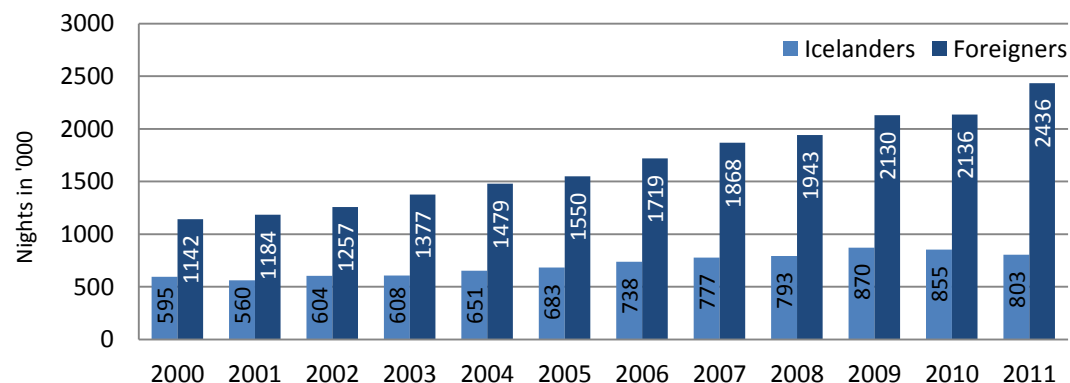
Just under half (46.9%) of overnight stays were in the capital area (incl. Reykjanes) in 2011, whereof two of every five were during the summer, a quarter during winter, 15.2% during spring, and 17.8% during autumn.

About half (53.1%) of overnight stays were spent outside the capital area and Reykjanes, whereof nearly 80% were during summer, 7.6% were during spring, 6.4% during autumn and 6.4% during winter.

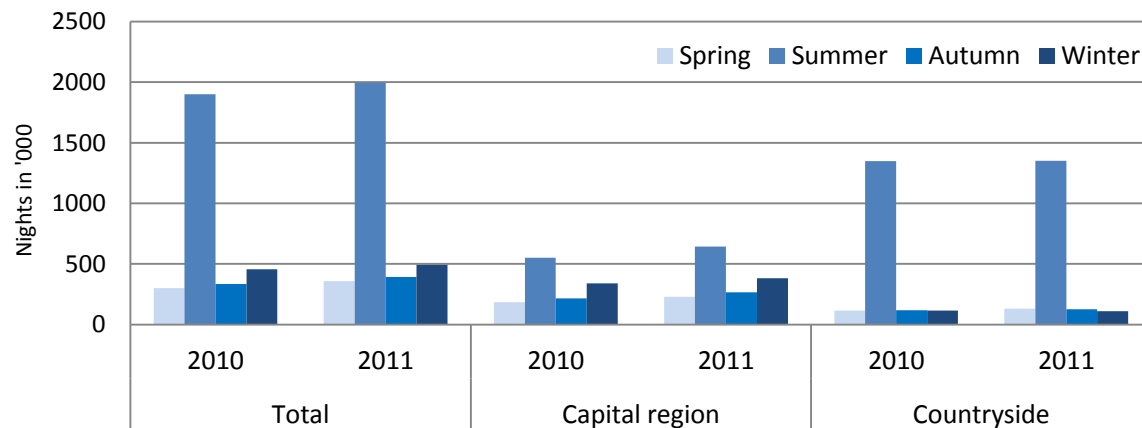
Source: Statistics Iceland.

For further information on accommodation statistics, see [Statistics Iceland](#).

OVERNIGHT STAYS IN ALL TYPES OF ACCOMMODATION



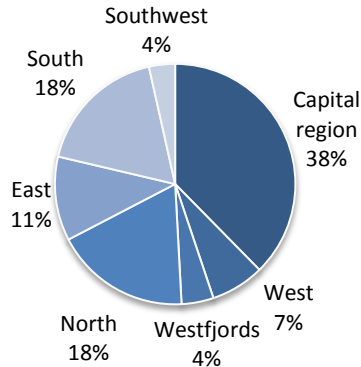
OVERNIGHT STAYS: CAPITAL REGION - COUNTRYSIDE



OVERNIGHT STAYS IN HOTELS/GUESTHOUSES

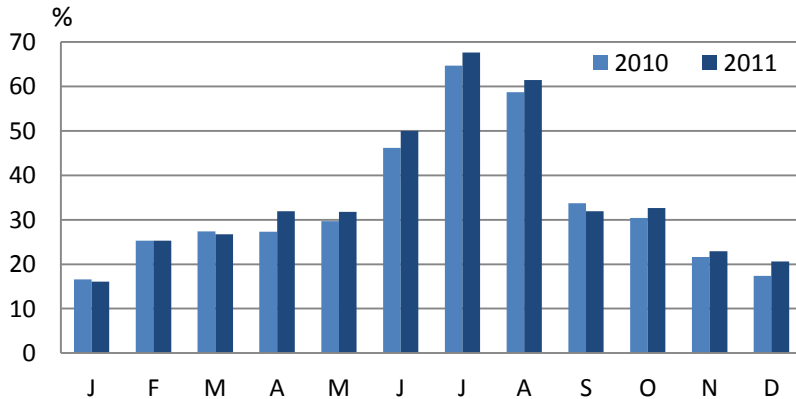
AVAILABLE BEDS IN HOTELS AND GUESTHOUSES 2011

In 2011, there were 21,150 beds available in 343 hotels and guesthouses, 5.3% more beds than in 2010.



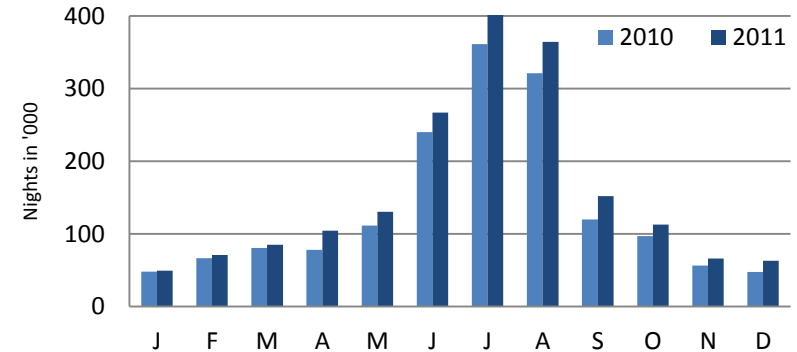
GUEST NIGHTS IN HOTELS AND GUESTHOUSES

Guest nights in hotels/guesthouses were highest in July, August and June. Thereafter were September, October, April and May with over 30% use for each month. Use was less during other months.



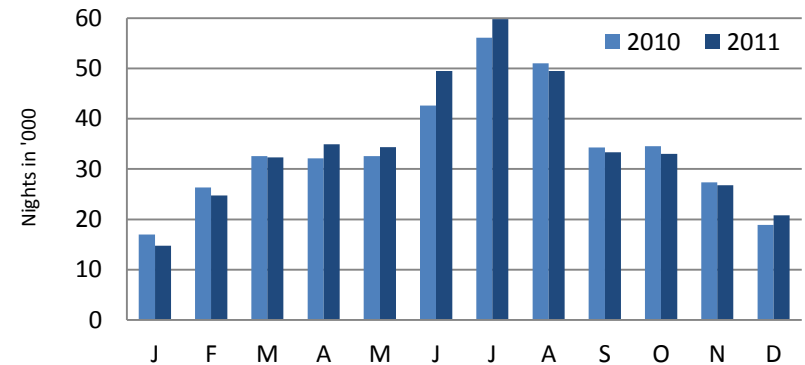
FOREIGN GUEST NIGHTS AT HOTELS AND GUESTHOUSES

Foreign visitors spent approx. 1.8 million nights in hotels and guesthouses in 2011, 14.7% more overnight stays than in 2010. 55.3% were during the summer, a quarter (26.7%) during spring or autumn and just under a fifth (17.8%) during the winter months.



DOMESTIC GUEST NIGHTS AT HOTELS AND GUESTHOUSES

Icelanders spent 405,000 guest nights at hotels and guesthouses in Iceland in 2011, 2.1% more overnight stays than the year before. 38% were spent during the summer, nearly 41% during spring or autumn and 21% during winter months.



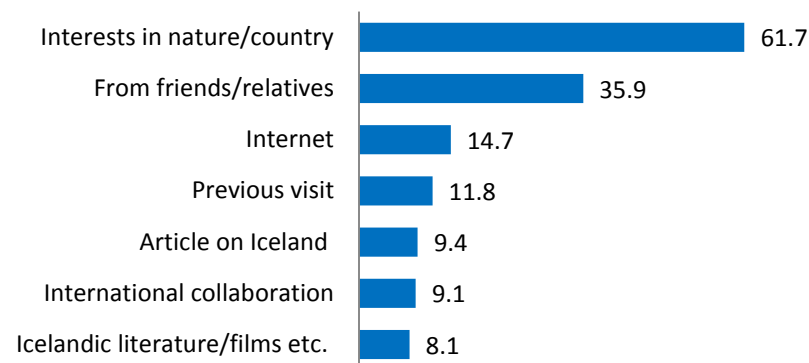
INTERNATIONAL VISITORS SUMMER 2011

The Icelandic Tourist Board asked MMR (Market and Media Research) to carry out an internet survey among international visitors during the summer of 2011, based on e-mail addresses collected at Keflavík Airport and in Seyðisfjörður. The sample was 4,545 people, with a response rate of 51.9%. Nine background criteria were used; gender, age, career, income, nationality, markets, type of trip, reason for trip and means of travel to Iceland.

GENDER OF RESPONDENTS		
	Female	51.2%
	Male	48.8%
AGE		
	Average age	39,6 yrs
	34 years and younger	45.0%
	35-54 years	36.9%
	55 years and older	18.0%
LEVEL OF TOTAL HOUSEHOLD INCOME		
	Low/low average	13.9%
	Average	39.3%
	High average/high	46.8%
RESPONDENTS BY MARKET		
	Nordic countries	20.2%
	United Kingdom	8.6%
	Central/S-Europe	43.8%
	North America	17.7%
	Other	9.7%
TYPE OF TOUR		
	Package trip	10.2%
	Individually arranged trip	79.6%
	Both; Package/individ. arrang.trip.	10.2%
PURPOSE OF VISIT		
	Vacation/holiday	86.3%
	Conference/meeting	10.4%
	Visiting friends and relatives	6.2%
	Study/research	3.6%
	Event in Iceland	2.9%
	Business/employment	2.8%

WHERE DID THE VISITOR GET THE IDEA OF COMING TO ICELAND (%)

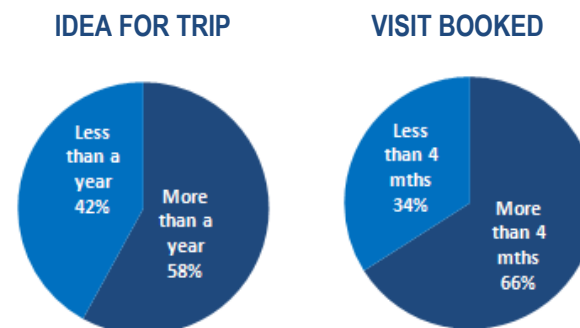
As in earlier surveys performed by the Icelandic Tourist Board, the majority of respondents mentioned interest in nature and the country when asked where they got the idea of coming to Iceland. Many mentioned friends and relatives, the internet and earlier visits. Other aspects had less of an influence.



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

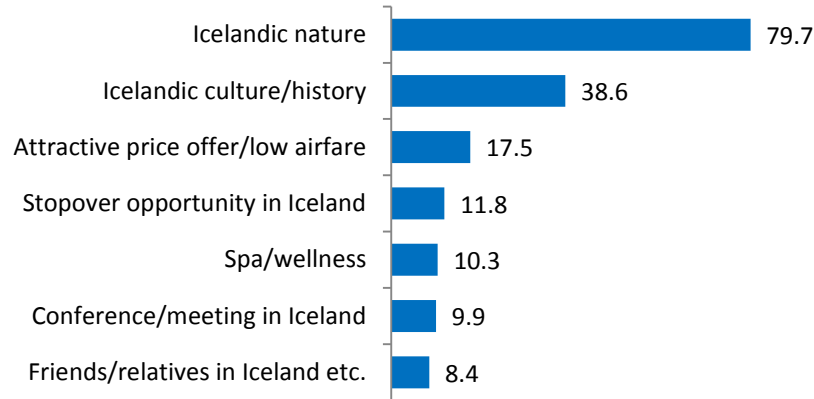
58% of visitors decided on visiting Iceland within one year of travelling. The time from booking to travelling was shorter than 4 months in 66% of cases.



See [survey on the ITB web](#). 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.

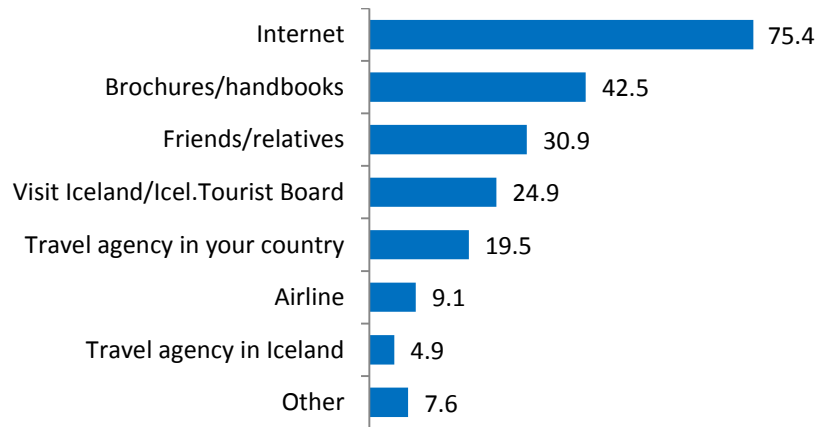
FACTORS INFLUENCING DECISION TO TRAVEL TO ICELAND (%)

The vast majority stated that an interest in nature affected their decision to travel to Iceland, 39% mentioned Icelandic culture and history while other reasons, such as favourable travel offers and stopover options, lagged behind.



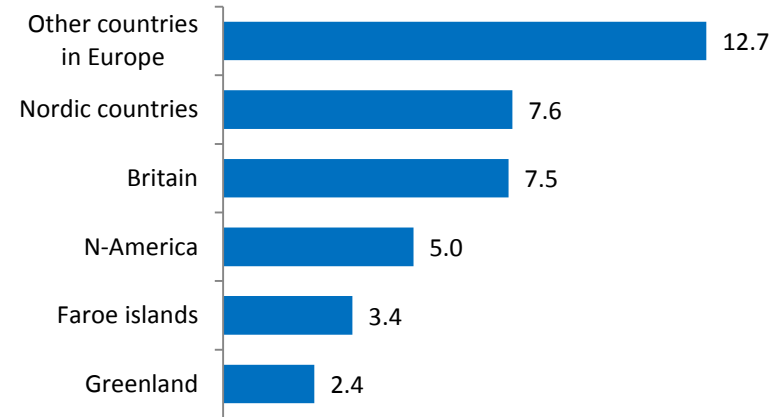
SOURCE OF INFORMATION ON ICELAND (%)

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



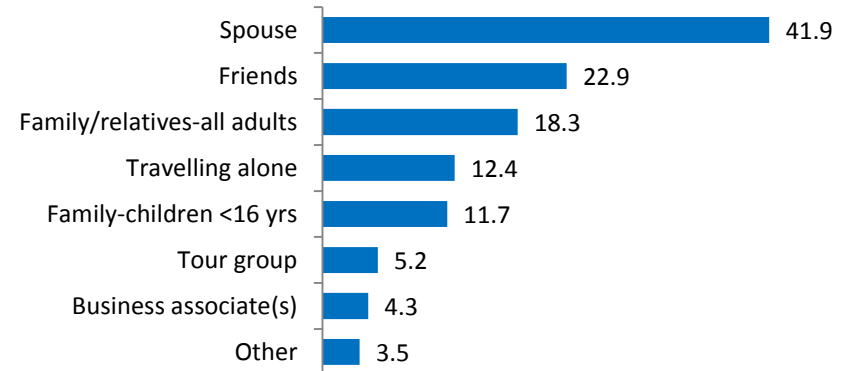
WERE OTHER COUNTRIES VISITED (%)

Just under a third of visitors visited other countries while travelling to Iceland. The majority of these were US citizens as 56% of them visited other countries.



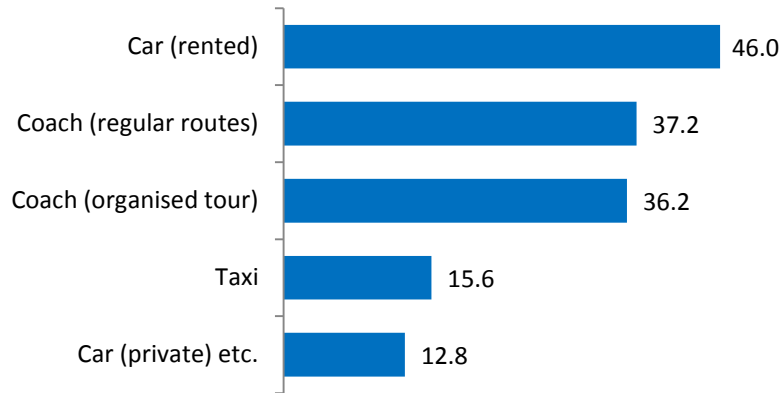
TRAVELLING COMPANION (%)

Most visitors travelled to Iceland with their spouse. Friends and family members older than 16 were also common travel companions. Few travelled with a tour group or business partners.



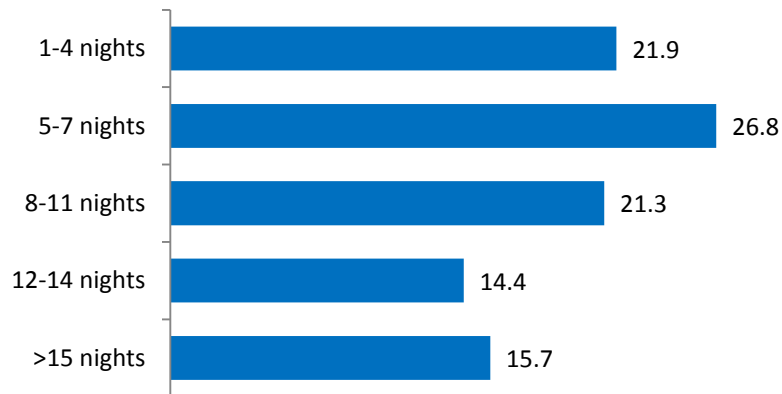
MODE OF TRAVEL (%)

Rental cars were most commonly used to travel within Iceland. Scheduled and tour coaches were also used extensively.



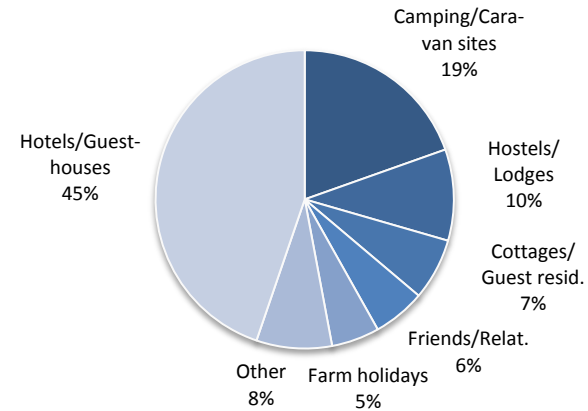
LENGTH OF STAY (%)

Foreign visitors stayed on average 10.2 nights in Iceland during summer 2011. Almost half stayed seven nights or less.



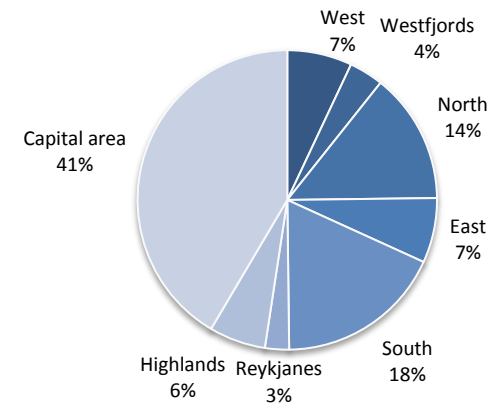
OVERNIGHT STAYS BY TYPE OF ACCOMMODATION

Visitors spent 44.8% of overnight stays in hotels and guesthouses, 19.6% at camping sites and 9.9% in hostels or lodges.

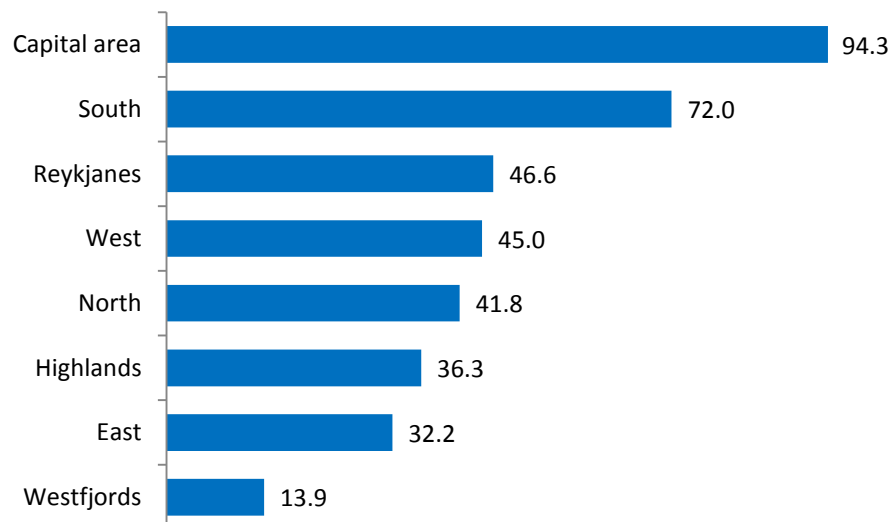


OVERNIGHT STAYS BY REGIONS

41.5% of overnight stays were in the capital area, 18.0% in south Iceland and 14.1% in the north. Around 26% was spent in other regions.



WHAT REGIONS AND PLACES DID FOREIGN VISITORS TRAVEL TO IN THE SUMMER OF 2011 (%)



Of the 35 locations specifically mentioned in the survey carried out by the Tourist Board, the following were most visited: Reykjavík 94.3%, Þingvellir/Geysir/ Gullfoss 72.0%, Vík 52.4%, Skaftafell 47.6%, Skógar 45.3%, Akureyri 42.2%, Mývatn 42.1%, Húsavík 32.3%, Ásbyrgi/Dettifoss 30.9% og Snæfellsnes National Park 30.9%.

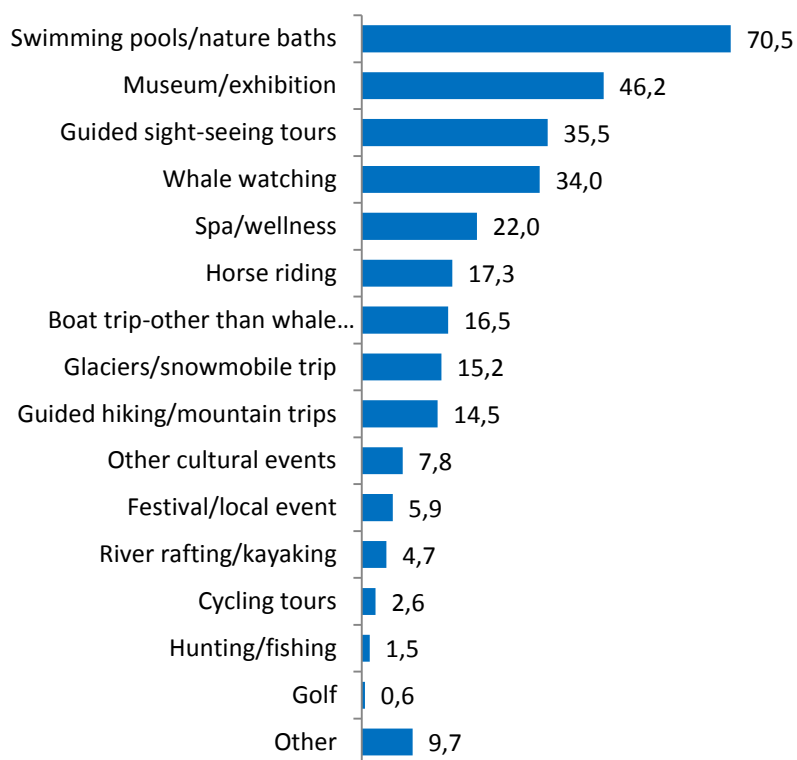
Reykjanes	46.6%
Reykjanesbær	21.3%
Reykjanes lighthouse/Gunnuhver	14.7%
West	45.0%
Snæfellsnes National Park	30.9%
Borgarfjörður	23.7%
Stykkishólmur/Breiðafj. Islands	18.9%
Búðardalur - Dalir	9.7%
Westfjords	13.9%
Ísafjörður	11.1%
Hólmavík/Strandir	8.8%
Látrabjarg	6.7%
Arnarfjörður/Dynjandi	6.6%

North	41.8%
Akureyri	42.2%
Mývatn	42.1%
Húsavík	32.3%
Ásbyrgi/Dettifoss	30.9%
Skagafjörður	17.6%
Hvammstangi/Hvítserkur	11.5%
Melrakkaslétta/Þórshöfn	4.0%
East	32.2%
Egilsstaðir/Hallormsstaður	27.5%
Seyðisfjörður	20.2%
Djúpivogur	15.5%
Borgarfjörður eystri	7.6%
Neskaupsstaður/Norðfjörður	6.4%

South	72.0%
Þingvellir/Geysir/Gullfoss	72.0%
Vík	52.4%
Skaftafell	47.6%
Skógar	45.3%
Hornafjörður	20.5%
Westman islands	14.1%
Eyrbakki	13.7%
Highlands	36.3%
Landmannalaugar	23.4%
Þórsmörk	13.5%
Kjölur (incl. Hveravellir)	12.4%
Herðubreiðalindir/Askja	7.2%
Kárahnjúkar/Snæfell	5.7%
Sprengisandur	4.8%

RECREATION PURCHASED IN ICELAND (%)

Swimming and warm spring baths were the most popular among international visitors during the 2011 summer. Just under half of visitors paid entrance fees to museums or shows, just over a third bought sightseeing tours with a guide and a similar proportion paid for whale-watching tours. Other nature related recreation, such as riding tours, boat trips, glacier/snowmobile tours and hiking trips with guides were also popular. Around a fifth opted for spa and wellness programmes.

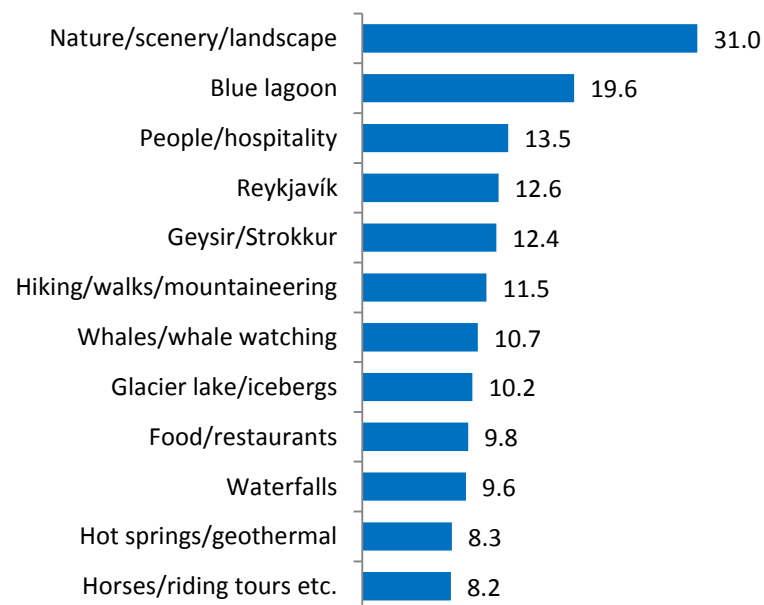


EXPENSES

Visitors generally paid ISK 90,055 for their air fare/cruise ship ticket. Those on package tours commonly paid ISK 248,122 for the trip. Accommodation was included in 90.7% of cases in package tours and 67.5% included flight/cruise ship tickets. 57.2% of package tours included sightseeing tours, 26.4% included a rental car and 36.1% accounted for other travel expenses. Half included food and beverages, 3.9% conference fees and 14.1% other expenses.

MOST MEMORABLE ASPECT OF VISIT (%)

The vast majority 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.



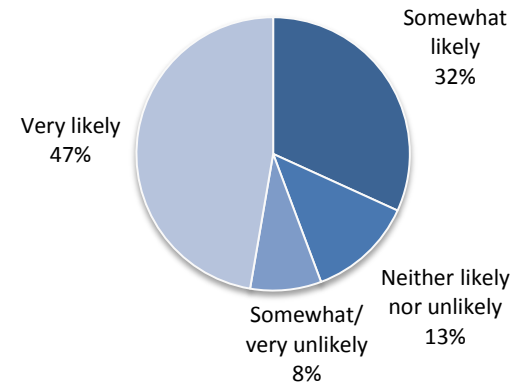
WHERE ARE ICELAND'S STRENGTHS IN THE TOURIST INDUSTRY

International visitors during the 2011 summer 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.

Nature/scenery/landscape	71.6%
People/hospitality	30.5%
Activities/lot to do-see	12.1%
Culture/history	11.2%
Service/quality	9.3%
Information/signs/info-centers	8.5%
Accessibility/simplicity/infrastructure	8.5%
Unique/exotic/exclusive	7.7%
English widely spoken/other languages spoken	6.8%
Tour service/excursions/guides	6.5%
Not crowded/solitude/not too touristic	6.1%
Clean air/cleanliness of country	5.5%
Swimming pools/nature baths/Spas	5.4%
Organisation/professionalism	5.4%
Food/restaurants	5.1%
Country itself	4.8%
Unspoiled nature	4.4%
Relax/peace and quiet/atmosphere	4.2%
Accommodation/hotels/hostels	4.2%
Geothermal activity	3.9%
Transport	3.7%
Closeness/countrys location	3.0%
Prices	2.6%
Reykjavik	2.5%
Fauna/flora	2.5%
Safety	2.1%
Horses/riding tours	1.6%
Marketing/publicity	1.5%
Vast space	1.4%
Adventures	1.4%
Shopping/products/fashion	1.3%
Hiking/hiking trails etc.	1.3%

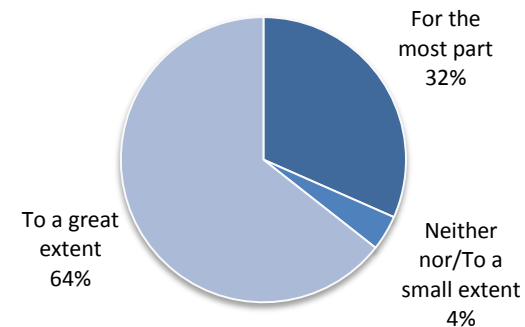
IS ANOTHER VISIT LIKELY

79.1% said that they would probably or quite probably visit Iceland again. Of these, 71.2% said they would probably visit Iceland during the summer, 16.4% during the spring or autumn and 12.4% during the winter.



DID THE TRIP MEET EXPECTATIONS

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



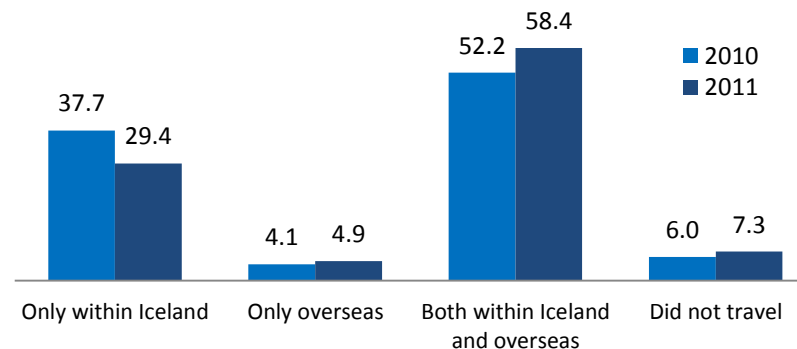
TRAVELS OF ICELANDERS 2011

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 2011, that was carried out in January 2012 by MMR, was based on a 1400 person sample. The response proportion was 60.1% The age group between 68 and 80 was surveyed by phone. The sample was 201 people and the response ratio was 54.8%. The results were processed according to several background criteria; gender, age, residence, education, employment, income and length of stay.

GENDER		
Female		49.4%
Male		50.6%
AGE		
18-39 years		44.0%
40-59 years		36.0%
60-80 years		19.0%
RESIDENCY		
Capital area		60.7%
Communities near the capital area		14.4%
Rest of Iceland		24.9%
HOUSEHOLD INCOME		
Under ISK 250,000		17.2%
ISK 250,000-399,000		22.5%
400,000-599,000		22.0%
600,000-799,000		16.5%
800,000 and higher		21.8%
JOB		
Managers and experts		32.4%
Technicians and office workers		16.0%
Waiters and shop assistants		10.7%
Tradesmen & industrial specialists		6.9%
Machinists/workers/seamen/farmers		7.5%
Students		13.5%
Home employed		13.1%

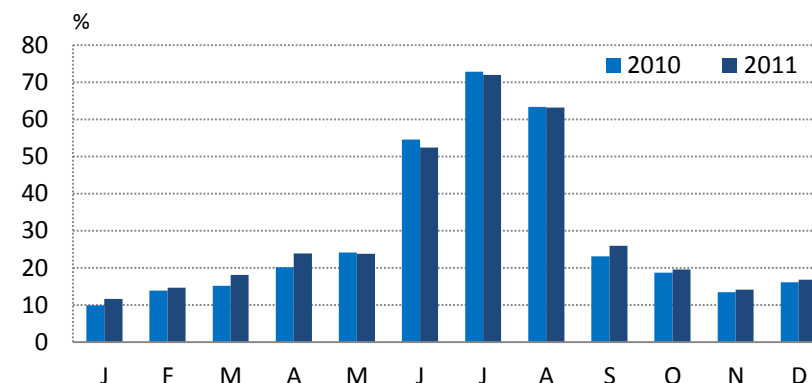
WERE TRIPS UNDERTAKEN IN ICELAND OR OVERSEAS (%)

Just under 9 of 10 Icelanders travelled in Iceland in 2011, a similar proportion as the year before. Just under two thirds travelled overseas in 2011, or 63.3%. 56.3% travelled overseas in 2010, according to a similar survey.



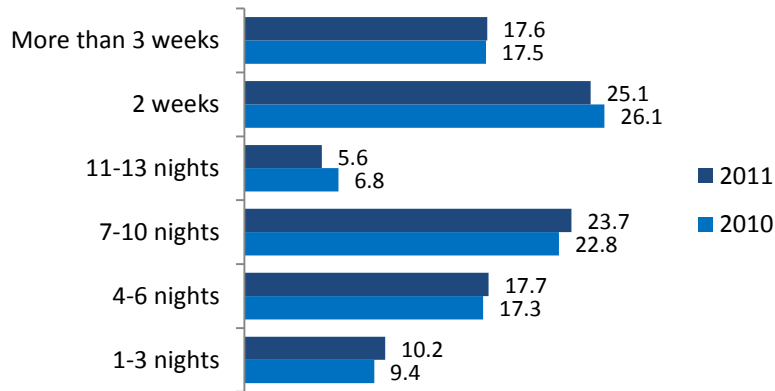
IN WHICH MONTH WERE TRIPS UNDERTAKEN IN ICELAND (%)

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



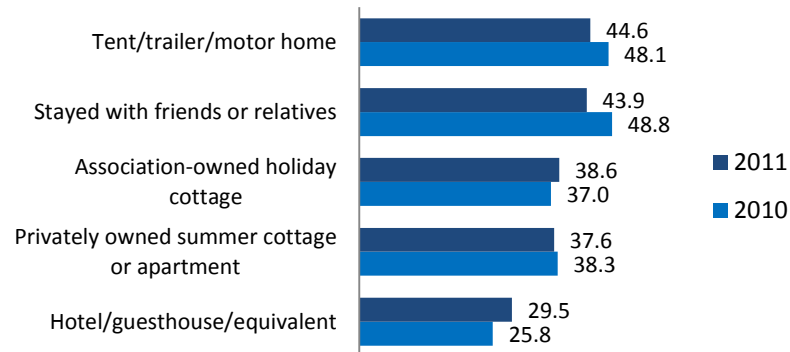
NUMBER OF OVERNIGHT STAYS IN ICELAND (%)

The average length of stay during domestic travels in 2011 was 14.0 nights, a little bit shorter than previous year, when the average was 14.9 nights.



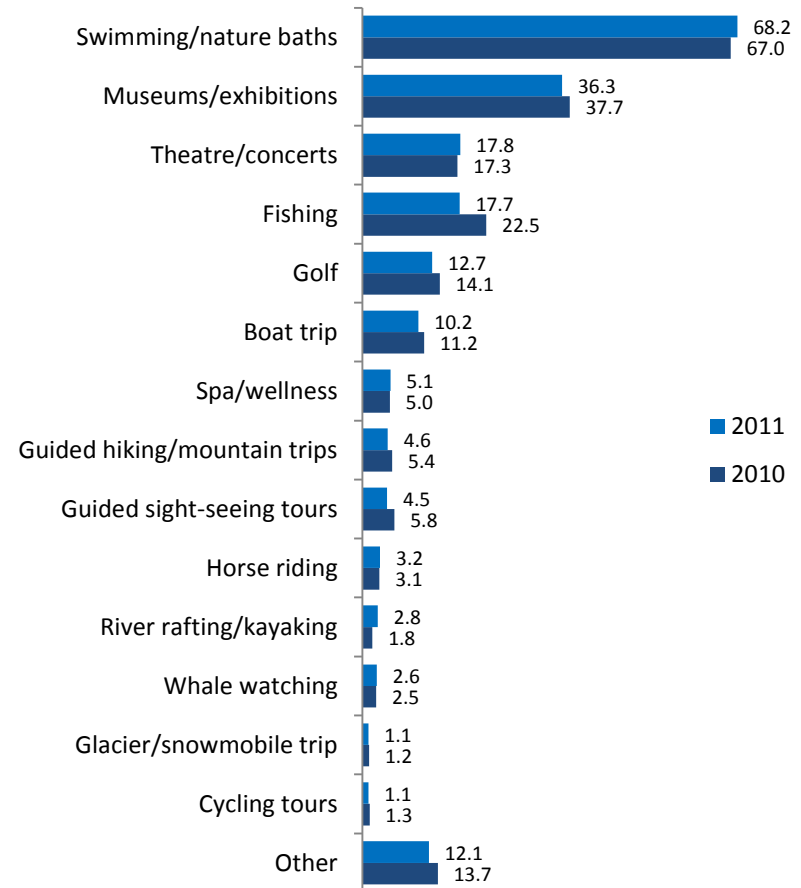
ACCOMMODATION OPTIONS USED DURING TRAVEL (%)

Tents, trailer tents or motor homes were the most common form of accommodation during travel in 2011. Accommodation with friends and family continued to be popular, as were association-owned holiday cottages and apartments..



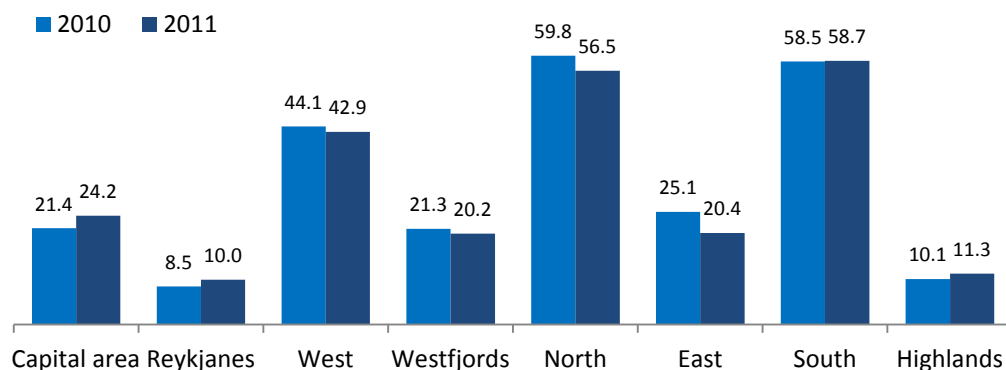
RECREATIONAL ACTIVITIES PAID FOR DURING TRAVEL (%)

Swimming and bathing in hot springs are the recreational options that most Icelanders paid for in domestic travel in 2011. A large number paid entrance fees to museums and exhibitions, for fishing permits, theatre tickets and for golf or boat trips.



WHAT REGIONS AND PLACES DID ICELANDIC TRAVELLERS* VISIT IN 2011

*Travel is defined as travel away from home and staying away for one or more nights.



Of the 46 locations specifically asked about in the Tourist Board survey, the following were most visited: Akureyri 41.8%, Þingvellir/Geysir/ Gullfoss 27.8%, Akranes/Borgarnes 22.6%, Skagafjörður 22.1%, Siglufjörður 17.7%, Mývatn-region 16.4%, Húsavík 15.9%, Egilsstaðir/Hallormsstaður 14.5%, Ísafjörður 14.0% and Húsafell/Reykholt 13.5%.

	2010	2011
Reykjanes	8.5%	10.0%
Reykjanesbær	6.0%	7.6%
Grindavík	4.3%	4.1%
Reykjanes lighthouse & surr.	2.9%	2.3%
Krísuvík	2.6%	2.2%
West	44.1%	42.9%
Akranes/Borgarnes	23.7%	22.6%
Húsafell/Reykholt	13.2%	13.5%
Stykkishólmur	14.1%	13.4%
Hvalfjörður	14.6%	13.1%
Dalir	9.8%	9.7%
Snæfellsnes National Park	10.9%	9.1%
Westfjords	21.3%	20.2%
Ísafjörður	11.7%	14.0%
Hólmavík/Strandir	9.4%	8.9%
Hrafnseyri	4.9%	3.5%
Látrabjarg	4.1%	2.8%
Hornstrandir	3.6%	2.0%
Flatey/Breiðafjörður	1.6%	1.3%

	2010	2011
North	59.8%	56.5%
Akureyri	43.6%	41.8%
Skagafjörður	17.9%	22.1%
Siglufjörður	8.0%	17.7%
Mývatn-region	17.1%	16.4%
Húsavík	15.9%	15.9%
Ásbyrgi	10.4%	8.0%
Hvammstangi	7.3%	7.3%
Þórshöfn	2.1%	3.8%
East	25.1%	20.4%
Egilsstaðir/Hallormsstaður	18.8%	14.5%
Fjarðarbyggð	11.2%	9.4%
Djúpivogur	6.8%	5.5%
Vopnafjörður	3.9%	4.6%
Seyðisfjörður	5.8%	4.3%
Borgarfjörður eystri	4.8%	3.3%

	2010	2011
South	58.5%	58.7%
Þingvellir/Geysir/Gullfoss	28.1%	27.8%
Westman islands	10.9%	12.1%
Vík	13.4%	12.1%
Eyrbakki	11.6%	11.8%
Kirkjubæjarklaustur	-	9.8%
Skógar	11.9%	9.7%
Hornafjörður	9.9%	7.9%
Skaftafell	8.5%	5.0%
Highlands	10.1%	11.3%
Landmannalaugar	4.7%	5.0%
Þórsmörk	5.6%	5.0%
Kjölur (incl. Hveravellir)	3.1%	3.8%
Sprengisandur	2.7%	2.0%
Herðubreiðalindir/Askja	1.3%	1.2%
Kárahnjúkar	1.1%	1.1%
Lakagígar	0.9%	0.8%
Kverkfjöll	1.0%	0.6%

DAY TRIPS IN 2011 (%)

Three of every four Icelanders went on day trips in 2011. A day trip was defined as a recreational trip lasting at least 5 hours and spent away from the home without staying overnight. Just under 30% went on 1-2 day trips, around 38% on 3-5 trips and 33% on 6 or more trips.

The majority went on day trips to south Iceland, whereof half went on 1-2 trips. West Iceland was in second place with around 37% and two thirds thereof going on 1-2 trips. Reykjanes, north Iceland and the capital area were next in-line as regards of number of day trips.

	DAYTRIP (%)	NUMBER OF DAY TRIPS (%)		
		1-2	3-5	6+
All Iceland	74.8	29.3	37.8	32.9
South	55.6	50.5	31.1	18.4
West	37.4	66.5	22.1	11.4
Reykjanes	26.0	73.7	17.8	8.5
North	25.1	56.1	27.5	16.4
Capital area	22.9	55.9	20.8	23.3
East	11.6	59.1	22.0	18.9
Westfjords	8.1	65.6	30.1	4.3

Survey among Icelanders may be found on [ITB website](#).

WHAT KIND OF TRIPS ARE PLANNED FOR 2012 (%)

Approximately 90% of Icelanders said they have plans for travel in 2012. Of these, 57% say they intend to spend time in a summer cottage in Iceland, 50% intend to visit friends or family, 34% intend to take a city break overseas, 32% intend to travel in Iceland with a group of friends or with a club, 28% intend to take a city or town break in Iceland and 25% intend to go on an outdoor recreation trip of some form.

