TOURISM IN ICELAND IN FIGURES

MAY 2016
## Tourism in Iceland in Figures

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ECONOMIC STATISTICS IN ICELANDIC TOURISM

THE SHARE OF TOURISM IN EXPORT REVENUE
Tourism’s share of foreign exchange earnings has grown from 18.8% to 31.0% between 2010–2015 according to measurements on the export of goods and services. At present, tourism accounts for more foreign exchange income than the fisheries industry and aluminium production.

<table>
<thead>
<tr>
<th>Year</th>
<th>Export of goods and services (ISK billions)</th>
<th>Tourism* (ISK billions)</th>
<th>Share of tourism</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>865,628</td>
<td>162,828</td>
<td>18.8%</td>
</tr>
<tr>
<td>2011</td>
<td>960,364</td>
<td>196,497</td>
<td>20.5%</td>
</tr>
<tr>
<td>2012</td>
<td>1,012,182</td>
<td>239,544</td>
<td>23.7%</td>
</tr>
<tr>
<td>2013</td>
<td>1,047,616</td>
<td>276,343</td>
<td>26.4%</td>
</tr>
<tr>
<td>2014</td>
<td>1,067,242</td>
<td>303,609</td>
<td>28.4%</td>
</tr>
<tr>
<td>2015</td>
<td>1,176,616</td>
<td>364,352</td>
<td>31.0%</td>
</tr>
</tbody>
</table>

*Total activity of Icelandic companies operating in Iceland and abroad.

SPENDING OF FOREIGN VISITORS
Revenue from foreign tourists amounted to ISK 208.4 billion in 2015, i.e. ISK 49.3 billion more than in 2014. This represents a year-on-year increase of some 31%.

<table>
<thead>
<tr>
<th>Year</th>
<th>Travel consumption (ISK bn. ¹)</th>
<th>Average spent per person</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>68,536</td>
<td>140,300</td>
</tr>
<tr>
<td>2011</td>
<td>86,937</td>
<td>153,700</td>
</tr>
<tr>
<td>2012</td>
<td>108,070</td>
<td>160,600</td>
</tr>
<tr>
<td>2013</td>
<td>130,772</td>
<td>162,000</td>
</tr>
<tr>
<td>2014</td>
<td>159,050</td>
<td>159,300</td>
</tr>
<tr>
<td>2015</td>
<td>208,351</td>
<td>161,600</td>
</tr>
</tbody>
</table>

¹In ISK at each year’s price levels. International flights and ferries are not included.

JOBS IN TOURISM-RELATED INDUSTRIES
The total amount of individuals working in tourism-related industries was 21,600 in 2014, i.e. 2,600 more than in 2013. While the number of people working nationally has increased by just more than 6% since 2010, the number of those working in tourism-related industries has increased by 37.6%.

<table>
<thead>
<tr>
<th>Year</th>
<th>Accommodation and restaurant operators, travel agents, tour operators</th>
<th>Passenger transport on land, sea and by air</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>9,800</td>
<td>6,300</td>
<td>15,700</td>
</tr>
<tr>
<td>2011</td>
<td>11,100</td>
<td>6,500</td>
<td>17,200</td>
</tr>
<tr>
<td>2012</td>
<td>11,100</td>
<td>6,800</td>
<td>17,500</td>
</tr>
<tr>
<td>2013</td>
<td>12,800</td>
<td>6,600</td>
<td>19,000</td>
</tr>
<tr>
<td>2014</td>
<td>14,500</td>
<td>7,600</td>
<td>21,600</td>
</tr>
</tbody>
</table>

Source: Statistics Iceland.
FOREIGN CARD TURNOVER

There has been considerable growth in foreign card turnover in Iceland in recent years. In 2013, card turnover was more than ISK 90 billion; this rose to more than ISK 154 billion in 2015.

TOTAL USE OF FOREIGN DEBIT AND CREDIT CARDS IN ICELAND (ISK billions)

Foreign card turnover rose sharply in every month between 2013–14 and 2014–15. Card turnover was highest in the summer months; for instance, summer turnover in 2015 was 41.8% of the year total. However, the ratio outside the summer months has increased in accordance with increased tourism.

CARD TURNOVER BY MONTH (ISK billions)

FOREIGN CARD TURNOVER BY EXPENSE ITEMS*

In 2015, almost a third (31.1%) of foreign card turnover was spent on accommodation and restaurant services, 19.2% on passenger transport, 14.9% in shops, 13.9% on various types of tourism service, e.g. sightseeing tours, 4.2% on petrol services and vehicle repair and maintenance, 2.4% on culture, entertainment and recreational activities and 5.5% on other tourism-related aspects. Cash withdrawals made up 9.1% of card turnover.

CARD TURNOVER BY EXPENSE ITEM (ISK billions)

* The data on card turnover by expense items contains all payment card use, both debit and credit cards. The card turnover of foreigners who purchase travel tickets or package tours to Iceland from their home countries is not included unless the card turnover is channelled through Icelandic acquirers.

Source: Centre for Retail Studies.
PERMITS

GUESTHOUSE PERMITS

In 2015, 1,831 accommodations had a permit issued by the District Commissioner*, thereof 480 with a catering license. Most of these were in the Capital Region and North Iceland, or 465 in each area. These numbers are irrespective of the size of the companies and only indicate the number of operators.

*Catering with or without Total

<table>
<thead>
<tr>
<th>Region</th>
<th>Catering with</th>
<th>Catering without</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capital Region</td>
<td>98</td>
<td>367</td>
<td>465</td>
</tr>
<tr>
<td>Reykjavík</td>
<td>23</td>
<td>52</td>
<td>75</td>
</tr>
<tr>
<td>West/Westfj.</td>
<td>96</td>
<td>207</td>
<td>303</td>
</tr>
<tr>
<td>North</td>
<td>128</td>
<td>337</td>
<td>465</td>
</tr>
<tr>
<td>East</td>
<td>59</td>
<td>146</td>
<td>205</td>
</tr>
<tr>
<td>South</td>
<td>76</td>
<td>242</td>
<td>318</td>
</tr>
<tr>
<td>Total</td>
<td>480</td>
<td>1351</td>
<td>1831</td>
</tr>
</tbody>
</table>

ISSUED TRAVEL AGENCY AND TOUR OPERATOR LICENCES

A number of new travel agency and tour operator licences were issued in 2010–2015, most in 2014, or 162, followed by 147 in 2015. The number of issued licences varies considerably between areas, with most being issued in the Capital Region and North Iceland.

<table>
<thead>
<tr>
<th>Region</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capital Region</td>
<td>65</td>
<td>46</td>
<td>64</td>
<td>92</td>
<td>98</td>
<td>95</td>
</tr>
<tr>
<td>Reykjavík</td>
<td>3</td>
<td>7</td>
<td>5</td>
<td>10</td>
<td>8</td>
<td>3</td>
</tr>
<tr>
<td>West/Westfj.</td>
<td>1</td>
<td>5</td>
<td>1</td>
<td>3</td>
<td>8</td>
<td>3</td>
</tr>
<tr>
<td>North</td>
<td>18</td>
<td>13</td>
<td>22</td>
<td>19</td>
<td>24</td>
<td>12</td>
</tr>
<tr>
<td>East</td>
<td>0</td>
<td>8</td>
<td>4</td>
<td>4</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>South</td>
<td>11</td>
<td>20</td>
<td>23</td>
<td>11</td>
<td>14</td>
<td>30</td>
</tr>
<tr>
<td>Total</td>
<td>106</td>
<td>107</td>
<td>125</td>
<td>142</td>
<td>162</td>
<td>147</td>
</tr>
</tbody>
</table>

Most travel agency and tour operator licences valid in 2015 were registered in the Capital Area, or 58.5%. Outside the Capital Area, most licences were registered in North and South Iceland.

NEW BUILDINGS IN REYKJAVÍK – GUEST ACCOMMODATIONS AND RESTAURANTS

In 2010–2015, the Office of the Building Inspector in Reykjavík approved 57,600 m² of building volume for new guest accommodations and restaurants. Most were approved in 2013, or 22,000 m². In 2014, a building volume of 18,000 m² was approved and 14,000 m² in 2015.

<table>
<thead>
<tr>
<th>Year</th>
<th>m²</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>14,000</td>
</tr>
<tr>
<td>2014</td>
<td>18,000</td>
</tr>
<tr>
<td>2013</td>
<td>22,000</td>
</tr>
<tr>
<td>2012</td>
<td>300</td>
</tr>
<tr>
<td>2011</td>
<td>3,000</td>
</tr>
<tr>
<td>2010</td>
<td>300</td>
</tr>
<tr>
<td>Total</td>
<td>57,600</td>
</tr>
</tbody>
</table>
INTERNATIONAL VISITORS AND CRUISES

FOREIGN TOURISTS TO ICELAND

The number of foreign tourists has more than doubled since 2010. The average yearly growth rate has been 21.6% since 2010. The biggest increase was from 2014 to 2015, or 29.1%.

<table>
<thead>
<tr>
<th>Year</th>
<th>Number of visitors</th>
<th>Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>488,600</td>
<td></td>
</tr>
<tr>
<td>2011</td>
<td>565,600</td>
<td></td>
</tr>
<tr>
<td>2012</td>
<td>672,900</td>
<td></td>
</tr>
<tr>
<td>2013</td>
<td>807,300</td>
<td></td>
</tr>
<tr>
<td>2014</td>
<td>998,600</td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td>1,289,140</td>
<td></td>
</tr>
</tbody>
</table>

Number of visitors

<table>
<thead>
<tr>
<th>Year</th>
<th>Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010-11</td>
<td>16.6%</td>
</tr>
<tr>
<td>2011-12</td>
<td>18.9%</td>
</tr>
<tr>
<td>2012-13</td>
<td>20.0%</td>
</tr>
<tr>
<td>2013-14</td>
<td>23.6%</td>
</tr>
<tr>
<td>2014-15</td>
<td>29.1%</td>
</tr>
</tbody>
</table>

*Average yearly growth rate

INTERNATIONAL CRUISE SHIP PASSENGERS

Since 2010, cruise ship passengers to Iceland have increased significantly, from 72,000 in 2010 to 103,000 in 2015. The mean annual increase has been 9.1% per year.

<table>
<thead>
<tr>
<th>Year</th>
<th>Vessels</th>
<th>Passengers</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>80</td>
<td>92,400</td>
</tr>
<tr>
<td>2014</td>
<td>91</td>
<td>104,800</td>
</tr>
<tr>
<td>2015</td>
<td>108</td>
<td>100,141</td>
</tr>
</tbody>
</table>

Vessels and passengers

Cruise-ship passengers are defined as day-trip passengers, as they do not spend the night in Iceland.

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 2013-2015

The total number of foreign visitors was around 1.3 million in 2015, a 29.2% increase from 2014, when foreign visitors numbered around 998,000. Around 1,290,000 tourists came on flights through Keflavík International Airport in 2015, or 97.9% of the total number of visitors. Around 18,000 came with Norræna through Seyðisfjörður, or around 1.4% of the total. Around 8,700 came on flights through Reykjavík Airport or Akureyri Airport, or 0.7% of the total. 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.

INTERNATIONAL VISITORS BY POINT OF ENTRY

<table>
<thead>
<tr>
<th>Point of Entry</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>13/14</th>
<th>14/15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keflavík Airport</td>
<td>781,016</td>
<td>969,181</td>
<td>1,261,938</td>
<td>24.1%</td>
<td>30.2%</td>
</tr>
<tr>
<td>Seyðisfjörður seaport</td>
<td>16,637</td>
<td>18,115</td>
<td>18,540</td>
<td>8.9%</td>
<td>2.3%</td>
</tr>
<tr>
<td>Other airports</td>
<td>9,696</td>
<td>10,260</td>
<td>8,662</td>
<td>5.8%</td>
<td>-15.6%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>807,349</strong></td>
<td><strong>997,556</strong></td>
<td><strong>1,289,140</strong></td>
<td><strong>23.6%</strong></td>
<td><strong>29.2%</strong></td>
</tr>
</tbody>
</table>

**VISITORS THROUGH KELAVÍK AIRPORT**

**By Nationality**

<table>
<thead>
<tr>
<th>Country</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>13/14</th>
<th>14/15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canada</td>
<td>23,970</td>
<td>38,790</td>
<td>46,654</td>
<td>61.8%</td>
<td>20.3%</td>
</tr>
<tr>
<td>China</td>
<td>17,597</td>
<td>26,037</td>
<td>47,643</td>
<td>48.0%</td>
<td>83.0%</td>
</tr>
<tr>
<td>Denmark</td>
<td>43,119</td>
<td>48,237</td>
<td>49,225</td>
<td>11.9%</td>
<td>2.0%</td>
</tr>
<tr>
<td>Finland</td>
<td>13,799</td>
<td>15,415</td>
<td>16,021</td>
<td>11.7%</td>
<td>3.9%</td>
</tr>
<tr>
<td>France</td>
<td>48,313</td>
<td>58,293</td>
<td>65,822</td>
<td>20.7%</td>
<td>12.9%</td>
</tr>
<tr>
<td>Germany</td>
<td>75,814</td>
<td>85,915</td>
<td>103,384</td>
<td>13.3%</td>
<td>20.3%</td>
</tr>
<tr>
<td>Italy</td>
<td>16,213</td>
<td>19,870</td>
<td>23,817</td>
<td>22.6%</td>
<td>19.9%</td>
</tr>
<tr>
<td>Japan</td>
<td>12,363</td>
<td>13,340</td>
<td>16,547</td>
<td>7.9%</td>
<td>24.0%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>52,707</td>
<td>53,647</td>
<td>51,402</td>
<td>1.8%</td>
<td>-4.2%</td>
</tr>
<tr>
<td>Spain</td>
<td>35,491</td>
<td>40,992</td>
<td>43,096</td>
<td>15.5%</td>
<td>5.1%</td>
</tr>
<tr>
<td>Sweden</td>
<td>14,307</td>
<td>19,315</td>
<td>25,935</td>
<td>35.0%</td>
<td>34.3%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>137,108</td>
<td>180,503</td>
<td>241,024</td>
<td>31.7%</td>
<td>33.5%</td>
</tr>
<tr>
<td>UK</td>
<td>119,712</td>
<td>152,104</td>
<td>242,805</td>
<td>27.1%</td>
<td>59.6%</td>
</tr>
<tr>
<td>Other</td>
<td>130,666</td>
<td>169,569</td>
<td>231,851</td>
<td>29.8%</td>
<td>36.7%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>781,016</strong></td>
<td><strong>969,181</strong></td>
<td><strong>1,261,938</strong></td>
<td><strong>24.1%</strong></td>
<td><strong>30.2%</strong></td>
</tr>
</tbody>
</table>

**By Market Area**

<table>
<thead>
<tr>
<th>Market Area</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>13/14</th>
<th>14/15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nordic countries</td>
<td>145,116</td>
<td>158,291</td>
<td>159,744</td>
<td>9.1%</td>
<td>0.9%</td>
</tr>
<tr>
<td>UK</td>
<td>137,108</td>
<td>180,503</td>
<td>241,024</td>
<td>31.7%</td>
<td>33.5%</td>
</tr>
<tr>
<td>Central/S. Europe*</td>
<td>194,484</td>
<td>230,547</td>
<td>275,670</td>
<td>18.5%</td>
<td>19.6%</td>
</tr>
<tr>
<td>North America</td>
<td>143,682</td>
<td>190,894</td>
<td>289,459</td>
<td>32.9%</td>
<td>51.6%</td>
</tr>
<tr>
<td>Other</td>
<td>160,626</td>
<td>208,946</td>
<td>296,041</td>
<td>30.1%</td>
<td>41.7%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>781,016</strong></td>
<td><strong>969,181</strong></td>
<td><strong>1,261,938</strong></td>
<td><strong>24.1%</strong></td>
<td><strong>30.2%</strong></td>
</tr>
</tbody>
</table>

**VISITORS THROUGH SEYÐISFJÖRDUR SEAPORT**

<table>
<thead>
<tr>
<th>Country</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>13/14</th>
<th>14/15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nordic countries</td>
<td>4,650</td>
<td>5,340</td>
<td>4,806</td>
<td>14.8%</td>
<td>-10.0%</td>
</tr>
<tr>
<td>Germany</td>
<td>7,133</td>
<td>7,705</td>
<td>8,489</td>
<td>8.0%</td>
<td>10.2%</td>
</tr>
<tr>
<td>Central/S. Europe</td>
<td>3,307</td>
<td>3,314</td>
<td>3,431</td>
<td>0.2%</td>
<td>3.5%</td>
</tr>
<tr>
<td>Other</td>
<td>1,547</td>
<td>1,756</td>
<td>1,814</td>
<td>13.5%</td>
<td>3.3%</td>
</tr>
<tr>
<td><strong>Other</strong></td>
<td><strong>16,837</strong></td>
<td><strong>18,115</strong></td>
<td><strong>18,540</strong></td>
<td><strong>8.9%</strong></td>
<td><strong>2.3%</strong></td>
</tr>
</tbody>
</table>

*Netherlands, Belgium, Austria, Switzerland, France, Spain and Italy.

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 and Air Iceland estimate visitor numbers through other airports based on passenger and sales figures.
INTERNATIONAL VISITORS BY MONTHS

Over the past three years, the increase in the number of tourists has been proportionately greater in winter than in spring, summer and fall. Records were broken in all months of 2014 and 2015 in comparison with the same months in preceding years. The year-on-year increase exceeded 30% for seven months of 2015, with the highest point – 49% – in October 2015.

DEPARTURES FROM KEFLAVÍK AIRPORT BY MONTH ('000)

Travellers from individual market areas were widely distributed in 2015. Thus, travellers from Central and South Europe were prominent during the summer months, while travellers from the Nordic countries, North America and from countries categorised as “elsewhere” were distributed evenly over the year. Travellers from the UK were the exception, as around half of these visitors came during the winter months.

TRAVELLERS THROUGH KEFLAVÍK AIRPORT BY MARKET REGION - 2015

Source: Icelandic Tourist Board.
INTERNATIONAL VISITORS BY SEASON

VISITORS 2013–2015

Approximately 40% of travellers in 2015 came during the three summer months (June–August), which was a decrease in ratio from 2013 (44.2%) and 2014 (42.2%). Approximately 30% came in the spring or autumn (April–May/Sept.–Oct.) and a similar ratio during winter (Jan.–Mar. and Nov.–Dec.).

<table>
<thead>
<tr>
<th>Year</th>
<th>Spring</th>
<th>Summer</th>
<th>Autumn</th>
<th>Winter</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>99,413</td>
<td>345,212</td>
<td>126,115</td>
<td>210,276</td>
<td>781,016</td>
</tr>
<tr>
<td>2014</td>
<td>125,938</td>
<td>408,640</td>
<td>154,805</td>
<td>279,798</td>
<td>969,181</td>
</tr>
<tr>
<td>2015</td>
<td>162,631</td>
<td>507,423</td>
<td>222,326</td>
<td>369,558</td>
<td>1,261,938</td>
</tr>
</tbody>
</table>

VISITORS BY MARKET 2015

In 2015, 59% of Central and Southern European visitors came during the summer, as did 44% of North American visitors, 36% of Nordic visitors, 18% of UK visitors and 42% of those categorised as from “elsewhere”. Some 40% of Nordic visitors came in the spring or autumn, as did 28% of UK visitors and 32% of North American visitors. Approximately half of UK visitors came in winter, as did nearly one-fourth of Nordic visitors, nearly one-fourth of North American visitors and approximately one-fourth categorised as coming from “elsewhere”.

<table>
<thead>
<tr>
<th>Market</th>
<th>Spring</th>
<th>Summer</th>
<th>Autumn</th>
<th>Winter</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nordic c.</td>
<td>30,911</td>
<td>58,183</td>
<td>33,270</td>
<td>37,380</td>
<td>159,744</td>
</tr>
<tr>
<td>UK</td>
<td>29,647</td>
<td>42,203</td>
<td>36,878</td>
<td>132,296</td>
<td>241,024</td>
</tr>
<tr>
<td>C/S-Eur.</td>
<td>29,109</td>
<td>153,928</td>
<td>43,659</td>
<td>48,974</td>
<td>275,670</td>
</tr>
<tr>
<td>N-America</td>
<td>38,039</td>
<td>127,604</td>
<td>54,423</td>
<td>69,393</td>
<td>289,459</td>
</tr>
<tr>
<td>Other</td>
<td>34,925</td>
<td>125,505</td>
<td>54,096</td>
<td>81,515</td>
<td>296,041</td>
</tr>
<tr>
<td>Total</td>
<td>162,631</td>
<td>507,423</td>
<td>222,326</td>
<td>369,558</td>
<td>1,261,938</td>
</tr>
</tbody>
</table>

Source: Icelandic Tourist Board.
NATIONALITIES THROUGH KEFLAVÍK AIRPORT 2015/2014

WINTER: 369,558 visitors came in 2015, 33.3% more than during the winter of 2014. Broken down by nations, the largest proportion came from the UK (35.8%) and US (16.3%). Travellers from Germany (4.5%), France (4.0%), China (3.3%), Denmark (3.3%), Norway (3.2%), Sweden (2.7%), Canada (2.4%) and Japan (2.4%) came thereafter. The total number of visitors from these ten nations was 77.9% of visitors during the winter of 2015.

SPRING/AUTUMN: 384,957 visitors came during the spring or autumn in 2015, 37.1% more than in 2014. Most came from the US (19.5%) and the UK (17.3%). Travellers from Germany (7.5%), Norway (5.9%), Denmark (4.7%), Canada (4.5%), Sweden (4.3%), France (4.0%), China (3.3%) and the Netherlands (2.2%) came thereafter. Together, these ten nations made up to 73.2% travellers during spring or autumn in 2015.

SUMMER: 507,423 came during the summer of 2015, 24.2% more than in 2014. Most summer visitors in 2015 came from the US (21.1%), Germany (11.4%), UK (8.3%), France (7.0%), China (4.4%), Canada (4.0%), Denmark (3.7%), Norway (3.3%), Sweden (3.3%) and Spain (3.2%). In total, these ten nations comprised 69.7% of visitors in 2015.
MARKETING AREAS THROUGH KEFLAVIK AIRPORT 2010–2015

WINTER: The number of travellers in winter in 2015 was triple that of those measured in 2010. The average annual increase has been 28.9% since 2010. Visitors from the UK have increased the most, or approximately 41% on average, and became around a third of all travellers in winter in 2015.

SPRING/AUTUMN: The number of tourists has increased from approximately 147,000 during spring and autumn to approximately 466,000 in the period between 2010 and 2015, or by around 319,000 travellers. The increase has been around 26.0% per year. The Nordic countries were the largest market area to begin with, but other market areas have since grown at their expense.

SUMMER: Travellers in summer have more than doubled since 2010, from 227,000 in 2010 to approximately 507,000 in 2015. The average annual increase has been 17.5%. The largest market share in summer is travellers from Mid- and Southern Europe, but their share has decreased from 2010, measuring at 30.3% in 2015.

Source: Icelandic Tourist Board.
# DEPARTURES FROM KEFLAVÍK AIRPORT 2015

## By nationality

<table>
<thead>
<tr>
<th>Country</th>
<th>Total</th>
<th>Spring</th>
<th>Summer</th>
<th>Autumn</th>
<th>Winter</th>
</tr>
</thead>
<tbody>
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<td>Canada</td>
<td>46,654</td>
<td>6,902</td>
<td>20,370</td>
<td>10,329</td>
<td>9,053</td>
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<td>China</td>
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<td>Finland</td>
<td>16,021</td>
<td>3,275</td>
<td>5,986</td>
<td>3,489</td>
<td>3,271</td>
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<td>France</td>
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<td>7,545</td>
<td>35,521</td>
<td>8,007</td>
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<tr>
<td>Germany</td>
<td>103,384</td>
<td>10,493</td>
<td>57,741</td>
<td>18,501</td>
<td>16,649</td>
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<td>Italy</td>
<td>23,817</td>
<td>2,137</td>
<td>15,801</td>
<td>2,910</td>
<td>2,969</td>
</tr>
<tr>
<td>Japan</td>
<td>16,547</td>
<td>1,229</td>
<td>2,513</td>
<td>3,947</td>
<td>8,858</td>
</tr>
<tr>
<td>Netherlands</td>
<td>29,546</td>
<td>3,609</td>
<td>13,607</td>
<td>4,830</td>
<td>7,500</td>
</tr>
<tr>
<td>Norway</td>
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<td>10,818</td>
<td>16,847</td>
<td>11,770</td>
<td>11,967</td>
</tr>
<tr>
<td>Poland</td>
<td>27,079</td>
<td>3,366</td>
<td>12,479</td>
<td>4,850</td>
<td>6,384</td>
</tr>
<tr>
<td>Russia</td>
<td>4,877</td>
<td>581</td>
<td>2,426</td>
<td>839</td>
<td>1,031</td>
</tr>
<tr>
<td>Spain</td>
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<td>2,871</td>
<td>16,244</td>
<td>4,986</td>
<td>3,065</td>
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<tr>
<td>Sweden</td>
<td>43,096</td>
<td>8,470</td>
<td>16,547</td>
<td>8,183</td>
<td>8,986</td>
</tr>
<tr>
<td>Switzerland</td>
<td>25,935</td>
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<td>4,042</td>
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<td>UK</td>
<td>241,024</td>
<td>29,647</td>
<td>42,203</td>
<td>36,878</td>
<td>132,296</td>
</tr>
<tr>
<td>USA</td>
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<td>31,137</td>
<td>107,234</td>
<td>44,094</td>
<td>60,340</td>
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<tr>
<td>Other</td>
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<td>25,765</td>
<td>85,542</td>
<td>35,714</td>
<td>52,874</td>
</tr>
<tr>
<td>Total</td>
<td>1,261,938</td>
<td>162,631</td>
<td>507,423</td>
<td>222,326</td>
<td>369,558</td>
</tr>
</tbody>
</table>

## By market

<table>
<thead>
<tr>
<th>Region</th>
<th>Total</th>
<th>Spring</th>
<th>Summer</th>
<th>Autumn</th>
<th>Winter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nordic countries</td>
<td>159,744</td>
<td>30,911</td>
<td>58,183</td>
<td>33,270</td>
<td>37,380</td>
</tr>
<tr>
<td>UK</td>
<td>241,024</td>
<td>29,647</td>
<td>42,203</td>
<td>36,878</td>
<td>132,296</td>
</tr>
<tr>
<td>Cent/S-Europe</td>
<td>275,670</td>
<td>29,109</td>
<td>153,928</td>
<td>43,659</td>
<td>48,974</td>
</tr>
<tr>
<td>North America</td>
<td>289,459</td>
<td>38,039</td>
<td>127,604</td>
<td>54,423</td>
<td>69,393</td>
</tr>
<tr>
<td>Other</td>
<td>296,041</td>
<td>34,925</td>
<td>125,505</td>
<td>54,096</td>
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</tr>
</tbody>
</table>


Source: Icelandic Tourist Board.
OVERNIGHT STAYS – ALL TYPES OF ACCOMMODATION

The total number of overnight stays in Iceland was around 6.5m in 2015. The overnight stays of foreign visitors were around 5.6m in 2015 and have increased by 21.3% annually since 2010. Overnight stays of Icelanders were 930,000 in 2015 and have increased by 2.4% since 2010.

OVERNIGHT STAYS BY SEASONS

Around 52% of the total overnight stays in 2015 were during summer, 25.9% during spring and autumn and 22.4% during winter.

There were nearly 3.1 million guest nights spent in the the Capital Region and Reykjanes area in 2015, or 48.2% of the total number of guest nights. Of these, 30.4% were during spring and autumn, 34.5% during summer and 35.1% during winter. Around half (51.8%) of guest nights, or around 3.4 million, were spent in other parts of Iceland, whereof 67.7% were spent during summer, 21.6% during spring and autumn and 10.7% during winter.
GUEST NIGHTS BY REGION

WINTER: Some 1.5 million guest nights were spent in the winter of 2015, i.e. 32.9% more than in 2014. Some 75% of guest nights (i.e. 1.1 million) were spent in the Capital Region and Reykjanes peninsula, 91.5% of which were spent by foreigners. Outside of the Capital Region and Reykjanes peninsula, most guest nights were spent in South Iceland (13.3% of the total) and North Iceland (5.2% of the total).

SUMMER: Some 3.4 million guest nights were spent in the summer of 2015, i.e. 8.8% more than in the same period in 2014. Around 32% of total guest nights were in the Capital Region and Reykjanes, 21.7% in South Iceland, 19.5% in North Iceland, 14.0 in West Iceland and the West Fjords. Foreigners accounted for 84.4% of total guest nights in Iceland in the summer of 2015. 64.8% of guest nights spent by foreigners were in rural Iceland.

SPRING/AUTUMN: Just less than 1.7 million guest nights were spent in the spring and autumn of 2015, i.e. 32.0% more than in the same period in 2014. Around 57% of total guest nights were in the Capital Region and Reykjanes, 17.3% in South Iceland, 11.2% in North Iceland, 8% in West Iceland and the Westfjords and 6.9% in East Iceland. Foreigners accounted for 87.2% of guest nights in the spring and autumn of 2015. Around 59% of guest nights spent by foreigners were in the Capital Region and Reykjanes peninsula.

Source: Statistics Iceland.
In 2015, there were 13,320 rooms available in 394 hotels and guesthouses in Iceland, when they were most numerous, 35.2% thereof in the Capital Region. Room availability in 2015 in Iceland was 9.7% higher than in 2014.

<table>
<thead>
<tr>
<th>Region</th>
<th>2014 No.</th>
<th>2014 %</th>
<th>2015 No.</th>
<th>2015 %</th>
<th>Increase 2014–15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capital Region</td>
<td>4,045</td>
<td>33.3%</td>
<td>4,688</td>
<td>35.2%</td>
<td>15.9%</td>
</tr>
<tr>
<td>Reykjanes</td>
<td>588</td>
<td>4.8%</td>
<td>665</td>
<td>5.0%</td>
<td>13.1%</td>
</tr>
<tr>
<td>West</td>
<td>879</td>
<td>7.2%</td>
<td>981</td>
<td>7.4%</td>
<td>11.6%</td>
</tr>
<tr>
<td>Westfjords</td>
<td>529</td>
<td>4.4%</td>
<td>550</td>
<td>4.1%</td>
<td>4.0%</td>
</tr>
<tr>
<td>Northwest</td>
<td>568</td>
<td>4.7%</td>
<td>642</td>
<td>4.8%</td>
<td>13.0%</td>
</tr>
<tr>
<td>Northeast</td>
<td>1,720</td>
<td>14.2%</td>
<td>1,831</td>
<td>13.7%</td>
<td>6.5%</td>
</tr>
<tr>
<td>East</td>
<td>1,445</td>
<td>11.9%</td>
<td>1,531</td>
<td>11.5%</td>
<td>6.0%</td>
</tr>
<tr>
<td>South</td>
<td>2,364</td>
<td>19.5%</td>
<td>2,432</td>
<td>18.3%</td>
<td>2.9%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>12,138</strong></td>
<td><strong>100.0%</strong></td>
<td><strong>13,320</strong></td>
<td><strong>100.0%</strong></td>
<td><strong>9.7%</strong></td>
</tr>
</tbody>
</table>

Rooms in hotels and guesthouses in all of Iceland have increased by 9,391, or 42%, since 2010. The most increase has been in the Capital Area, where 1,202 rooms have been added since 2010.

Proportionally, however, rooms have increased the most in Suðurnes (86%), followed by South Iceland (52%) and Northwest Iceland (48%). Other regions have seen less increase, or 34–40%.

Nationwide room occupancy in year-round hotels was 64.5% in 2015, which is a 37.5% increase from 2010, when it was 46.9%.

In 2015, the best utilisation was in the Capital Region, or 79%, followed by Suðurnes with 62%.

There was an annual increase in room occupancy from 2014 to 2015 during all months of the year in South Iceland, 11 months of the year in West Iceland and the Westfjords, 10 months in Suðurnes, 9 months in East Iceland, 6 months in the Capital Region and 4 months in North Iceland.

Occupancy was more than 75% in the Capital Region nine months of the year in 2015. In Suðurnes, occupancy was more than 75% three months of the year in 2015. Occupancy was at its highest in the summer months outside the Capital Region. Off-peak, occupancy fell below 25% in many regions outside of the Capital Region and Reykjanes.
GUEST NIGHTS BY TYPE OF ACCOMODATION

GUEST NIGHTS IN HOTELS AND GUESTHOUSES

In 2015, the total number of guest nights in hotels and guesthouses was approximately 4.1 million, i.e. 25% more than in 2014. Guest nights spent by foreigners were 87.9% of the 2015 total and accounted for all the increase in guest nights between years.

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2015</th>
<th>Increase/decrease 2014–15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number</td>
<td>2,787,254</td>
<td>3,613,046</td>
<td>29.6%</td>
</tr>
<tr>
<td>%</td>
<td>84.8%</td>
<td>87.9%</td>
<td>-0.8%</td>
</tr>
</tbody>
</table>

Guest nights in hotels and guest houses increased every month in 2015 as compared to the previous year. The proportional distribution of guest nights across the seasons in 2015 was as follows: 43.6% in summer, 29.3% in spring and autumn and 27.2% in winter. Seasonal fluctuations applied to a lesser extent to Icelanders.

OTHER ACCOMMODATION ('000)

Guest nights in accommodation other than hotels and guest houses were 2.4 million in 2015, an increase of 10.2% on 2014. Most were in campsites (35.4%), apartments (20.7%) and hostels (19.7%). Foreigner guest nights accounted for 82.1% of the total number of guest nights in other accommodation. This is 23.2% greater than in 2014, with the biggest growth appearing in foreigner guest nights in private home accommodation and apartments.

OVERNIGHT STAYS IN HOTELS AND GUESTHOUSES

Twenty nationalities accounted for 94.7% of guest nights in hotels and guesthouses in 2015. The British, Americans, Germans and Icelanders were by far the most numerous. Icelanders spent fewer nights in hotels and guesthouses in 2015 than in 2014.

OTHER ACCOMMODATION ('000)

<table>
<thead>
<tr>
<th></th>
<th>Foreigners</th>
<th>Icelanders</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>2015</td>
<td>2014</td>
<td>2015</td>
</tr>
<tr>
<td>Camping sites</td>
<td>531</td>
<td>578</td>
<td>415</td>
</tr>
<tr>
<td>Apartments</td>
<td>362</td>
<td>482</td>
<td>49</td>
</tr>
<tr>
<td>Youth hostels</td>
<td>339</td>
<td>440</td>
<td>37</td>
</tr>
<tr>
<td>Holiday centres</td>
<td>170</td>
<td>223</td>
<td>38</td>
</tr>
<tr>
<td>Private home acc.</td>
<td>149</td>
<td>206</td>
<td>26</td>
</tr>
<tr>
<td>Lodges / sleeping bag</td>
<td>66</td>
<td>63</td>
<td>20</td>
</tr>
<tr>
<td>Total</td>
<td>1,617</td>
<td>1,993</td>
<td>585</td>
</tr>
</tbody>
</table>

Source: Statistics Iceland.
NUMBER AND DEVELOPMENT OF GUEST NIGHTS AND TRAVELLERS

Here is an overview of the number of guest nights with reference to the number of visitors through Keflavík airport (KEF) in 2010 to 2015. 2010 is the base year, and numbers on guest nights and travellers from year to year are proportional indices. This way, it can be determined whether the number of guest nights have been consistent with the increased number of travellers. The figures show the development since 2010, and the charts below illustrate the changes between years.

Visitors from China

<table>
<thead>
<tr>
<th>Year</th>
<th>'10</th>
<th>'11</th>
<th>'12</th>
<th>'13</th>
<th>'14</th>
<th>'15</th>
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</thead>
<tbody>
<tr>
<td>Guest nights ('000)</td>
<td>9</td>
<td>14</td>
<td>24</td>
<td>46</td>
<td>69</td>
<td>152</td>
</tr>
<tr>
<td>Increase (%)</td>
<td>100</td>
<td>145</td>
<td>250</td>
<td>487</td>
<td>725</td>
<td>1612</td>
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Visitors from Scandinavia

<table>
<thead>
<tr>
<th>Year</th>
<th>'10</th>
<th>'11</th>
<th>'12</th>
<th>'13</th>
<th>'14</th>
<th>'15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Guest nights ('000)</td>
<td>348</td>
<td>379</td>
<td>428</td>
<td>467</td>
<td>551</td>
<td>586</td>
</tr>
<tr>
<td>Increase (%)</td>
<td>100</td>
<td>109</td>
<td>122</td>
<td>145</td>
<td>158</td>
<td>168</td>
</tr>
<tr>
<td>Visitors KEF ('000)</td>
<td>113</td>
<td>127</td>
<td>142</td>
<td>145</td>
<td>158</td>
<td>160</td>
</tr>
<tr>
<td>Increase (%)</td>
<td>100</td>
<td>113</td>
<td>126</td>
<td>129</td>
<td>140</td>
<td>142</td>
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</tbody>
</table>

Visitors from Central and Southern Europe

<table>
<thead>
<tr>
<th>Year</th>
<th>'10</th>
<th>'11</th>
<th>'12</th>
<th>'13</th>
<th>'14</th>
<th>'15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Guest nights ('000)</td>
<td>931</td>
<td>1,010</td>
<td>1,161</td>
<td>1,466</td>
<td>1,662</td>
<td>2,011</td>
</tr>
<tr>
<td>Increase (%)</td>
<td>100</td>
<td>108</td>
<td>125</td>
<td>157</td>
<td>179</td>
<td>216</td>
</tr>
<tr>
<td>Visitors KEF ('000)</td>
<td>132</td>
<td>149</td>
<td>170</td>
<td>194</td>
<td>231</td>
<td>276</td>
</tr>
<tr>
<td>Increase (%)</td>
<td>100</td>
<td>113</td>
<td>129</td>
<td>147</td>
<td>175</td>
<td>209</td>
</tr>
</tbody>
</table>

Visitors from the UK

<table>
<thead>
<tr>
<th>Year</th>
<th>'10</th>
<th>'11</th>
<th>'12</th>
<th>'13</th>
<th>'14</th>
<th>'15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Guest nights ('000)</td>
<td>261</td>
<td>297</td>
<td>395</td>
<td>572</td>
<td>829</td>
<td>1,107</td>
</tr>
<tr>
<td>Increase (%)</td>
<td>100</td>
<td>114</td>
<td>151</td>
<td>219</td>
<td>317</td>
<td>424</td>
</tr>
<tr>
<td>Visitors KEF ('000)</td>
<td>60</td>
<td>68</td>
<td>95</td>
<td>137</td>
<td>181</td>
<td>241</td>
</tr>
<tr>
<td>Increase (%)</td>
<td>100</td>
<td>112</td>
<td>157</td>
<td>227</td>
<td>299</td>
<td>400</td>
</tr>
</tbody>
</table>

Other Visitors

<table>
<thead>
<tr>
<th>Year</th>
<th>'10</th>
<th>'11</th>
<th>'12</th>
<th>'13</th>
<th>'14</th>
<th>'15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Guest nights ('000)</td>
<td>403</td>
<td>434</td>
<td>507</td>
<td>451</td>
<td>524</td>
<td>732</td>
</tr>
<tr>
<td>Increase/decrease (%)</td>
<td>100</td>
<td>108</td>
<td>126</td>
<td>112</td>
<td>130</td>
<td>182</td>
</tr>
<tr>
<td>Visitors KEF ('000)</td>
<td>89</td>
<td>102</td>
<td>126</td>
<td>161</td>
<td>208</td>
<td>296</td>
</tr>
<tr>
<td>Increase (%)</td>
<td>100</td>
<td>115</td>
<td>142</td>
<td>181</td>
<td>234</td>
<td>333</td>
</tr>
</tbody>
</table>
NUMBER OF VISITORS AT TOURIST LOCATIONS

Here are the results from the counting of visitors to six popular destinations in South and West Iceland, part of research on the tolerance limits of these locations. This project is a collaboration between the Icelandic Tourist Board and the University of Iceland. The results are based on vehicle traffic on the access routes to the destination, using vehicle counters, and measurements of average passenger numbers in private vehicles and buses. The measurement period was one year, February 2015 to February 2016.

NUMBER OF VISITORS BY PERIOD ('000)

<table>
<thead>
<tr>
<th>Period</th>
<th>Hakið (Þingvellir)</th>
<th>Jökulsárlón</th>
<th>Sólheimajökull</th>
<th>Hraunfossar</th>
<th>Seltún Krýsuvik</th>
<th>Djúpalónssandur</th>
</tr>
</thead>
<tbody>
<tr>
<td>Late winter</td>
<td>65</td>
<td>36</td>
<td>23</td>
<td>7</td>
<td>11</td>
<td>4</td>
</tr>
<tr>
<td>End of winter</td>
<td>75</td>
<td>48</td>
<td>24</td>
<td>14</td>
<td>20</td>
<td>10</td>
</tr>
<tr>
<td>Spring</td>
<td>87</td>
<td>77</td>
<td>23</td>
<td>31</td>
<td>27</td>
<td>21</td>
</tr>
<tr>
<td>High season</td>
<td>116</td>
<td>103</td>
<td>31</td>
<td>47</td>
<td>35</td>
<td>28</td>
</tr>
<tr>
<td>Autumn</td>
<td>103</td>
<td>88</td>
<td>34</td>
<td>31</td>
<td>25</td>
<td>19</td>
</tr>
<tr>
<td>Early winter</td>
<td>84</td>
<td>49</td>
<td>27</td>
<td>15</td>
<td>14</td>
<td>7</td>
</tr>
<tr>
<td>High winter</td>
<td>144</td>
<td>39</td>
<td>47</td>
<td>13</td>
<td>13</td>
<td>5</td>
</tr>
<tr>
<td>Total</td>
<td>674</td>
<td>439</td>
<td>210</td>
<td>157</td>
<td>144</td>
<td>94</td>
</tr>
</tbody>
</table>

Late winter: weeks 8–15, End of winter: weeks 16–22, Spring: weeks 23–27, High season: week 28−32, Autumn: weeks 33–37, Early winter: week 38−43, High winter: weeks 44−07

NUMBER OF VISITORS BY PERIODS AND MONTHS

Here is the number of guests in the high season from early July to mid-August and in high winter, from November to February.

NUMBER OF GUESTS DURING HIGH SEASON AND HIGH WINTER ('000)

As can be seen, most visit Hakið (Þingvellir) and Jökulsárlón all months of the year.
TRAVELS OF ICELANDERS 2015/2014

The Icelandic Tourist Board has for many years conducted surveys among Icelanders on their domestic and international travels. A survey from January 2016 was based on a 1400-person sample selected randomly from MMR’s 18,000-person opinion group, which was randomly selected from the National Register. The response proportion was 66.0%. The results were processed according to several demographic categories: gender, age, residence, education, employment, income and length of stay.

**GENDER**

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Female</td>
<td>47%</td>
<td>49%</td>
</tr>
<tr>
<td>Male</td>
<td>53%</td>
<td>51%</td>
</tr>
</tbody>
</table>

**AGE**

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>18–39 years</td>
<td>47%</td>
<td>44%</td>
</tr>
<tr>
<td>40–59 years</td>
<td>40%</td>
<td>36%</td>
</tr>
<tr>
<td>60–80 years</td>
<td>13%</td>
<td>19%</td>
</tr>
</tbody>
</table>

**RESIDENCY**

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capital Region</td>
<td>62%</td>
<td>64%</td>
</tr>
<tr>
<td>Communities near the Capital Region</td>
<td>14%</td>
<td>12%</td>
</tr>
<tr>
<td>Rest of Iceland</td>
<td>24%</td>
<td>24%</td>
</tr>
</tbody>
</table>

**HOUSEHOLD INCOME (ISK)**

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 249,000</td>
<td>14%</td>
<td>12%</td>
</tr>
<tr>
<td>250,000-399,000</td>
<td>17%</td>
<td>15%</td>
</tr>
<tr>
<td>400,000-599,000</td>
<td>21%</td>
<td>21%</td>
</tr>
<tr>
<td>600,000-799,000</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>800,000 and more</td>
<td>31%</td>
<td>35%</td>
</tr>
</tbody>
</table>

**JOB**

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Managers and experts</td>
<td>28%</td>
<td>29%</td>
</tr>
<tr>
<td>Technicians and office workers</td>
<td>13%</td>
<td>14%</td>
</tr>
<tr>
<td>Waiters and shop assistants</td>
<td>12%</td>
<td>15%</td>
</tr>
<tr>
<td>Tradesmen &amp; industrial specialists</td>
<td>8%</td>
<td>9%</td>
</tr>
<tr>
<td>Machinists/workers/seamen/farmers</td>
<td>9%</td>
<td>8%</td>
</tr>
<tr>
<td>Students</td>
<td>15%</td>
<td>11%</td>
</tr>
<tr>
<td>Not employed outside the home</td>
<td>15%</td>
<td>14%</td>
</tr>
</tbody>
</table>

TRIPS UNDERTAKEN IN ICELAND OR OVERSEAS 2015

Approximately 85% of respondents travelled domestically in 2015, slightly fewer than in 2014. 71% travelled abroad in 2015, an increase from the 67.5% in 2014.

TRAVELS IN ICELAND OR ABROAD

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Only within Iceland</td>
<td>26.6%</td>
<td>23.4%</td>
</tr>
<tr>
<td>Only overseas</td>
<td>7.0%</td>
<td>9.0%</td>
</tr>
<tr>
<td>Both within Iceland and overseas</td>
<td>60.5%</td>
<td>61.7%</td>
</tr>
<tr>
<td>Did not travel</td>
<td>6.9%</td>
<td>6.9%</td>
</tr>
</tbody>
</table>

NUMBER OF TRIPS

Those taking a foreign holiday in 2015 went on average 2.2 times, which is less than the year before. Those taking day-trips in 2015 went on average 7.2 times, slightly less in 2014. Those taking domestic trips away from home with at least one overnight stay took, on average, 6 such trips, fewer than in 2014.

NUMBER OF TRIPS TAKEN

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overseas trips</td>
<td>8.1</td>
<td>7.2</td>
</tr>
<tr>
<td>Domestic day trips</td>
<td>6.6</td>
<td>6.0</td>
</tr>
<tr>
<td>Domestic trips</td>
<td>2.4</td>
<td>2.2</td>
</tr>
</tbody>
</table>
OVERSEAS TRIPS

NUMBER OF TRIPS AND LENGTH OF STAY
Some 71% took a foreign holiday in 2015, on average 2.2 times. Most, or 42.5%, went on one trip, 32% took two trips and 25.5% took three or more trips.

The average length of stay for overseas trips was 17.5 nights \(^1\) in 2015, i.e. the same as in 2014. A fifth of travellers stayed less than a week, around a quarter 1–2 weeks, a quarter 2–3 weeks and just more than a quarter more than three weeks.

WHAT KIND OF TRIP AND WHERE?
The majority went on a city or town break overseas, a visit to friends or relatives, sun-seeking holidays and a work-related trip in 2015.

WHAT KIND OF OVERSEAS TRIP WAS TAKEN?

<table>
<thead>
<tr>
<th>Trip Type</th>
<th>2015</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>City break</td>
<td>43.0%</td>
<td></td>
</tr>
<tr>
<td>Visit friends or relatives</td>
<td>36.0%</td>
<td></td>
</tr>
<tr>
<td>Sun-seeking holiday</td>
<td>33.6%</td>
<td></td>
</tr>
<tr>
<td>Work-related</td>
<td>24.3%</td>
<td></td>
</tr>
<tr>
<td>Sports trip</td>
<td>6.8%</td>
<td></td>
</tr>
<tr>
<td>Various speciality trip</td>
<td>4.9%</td>
<td></td>
</tr>
<tr>
<td>Educational trip</td>
<td>4.3%</td>
<td></td>
</tr>
<tr>
<td>Golf trip</td>
<td>4.1%</td>
<td></td>
</tr>
<tr>
<td>Skiing trip</td>
<td>1.8%</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>13.4%</td>
<td></td>
</tr>
</tbody>
</table>

Travels of Icelanders in 2015 were largely limited to Spain, Portugal, the UK, Scandinavia, North America, Germany, Benelux countries, Italy and France.

WHICH COUNTRIES WERE VISITED?

<table>
<thead>
<tr>
<th>Country</th>
<th>2015</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spain/Portugal</td>
<td>33.8%</td>
<td></td>
</tr>
<tr>
<td>UK/Ireland</td>
<td></td>
<td>26.9%</td>
</tr>
<tr>
<td>Denmark</td>
<td></td>
<td>23.1%</td>
</tr>
<tr>
<td>N-America</td>
<td></td>
<td>22.3%</td>
</tr>
<tr>
<td>Germany</td>
<td></td>
<td>18.6%</td>
</tr>
<tr>
<td>Sweden</td>
<td></td>
<td>13.9%</td>
</tr>
<tr>
<td>Norway</td>
<td></td>
<td>12.0%</td>
</tr>
<tr>
<td>Benelux</td>
<td></td>
<td>8.2%</td>
</tr>
<tr>
<td>Italy</td>
<td></td>
<td>7.4%</td>
</tr>
<tr>
<td>France</td>
<td></td>
<td>6.6%</td>
</tr>
</tbody>
</table>

\(^1\)Those staying longer than 100 nights were not included in the data.
- **DOMESTIC DAY TRIPS**¹

Some 72% took a day-trip in 2015, on average 7.2 times. Close to a third went on 1–2 trips, just less than a third on 3–5 trips, and two out of every five on six trips or more.

### HOW MANY DAY-TRIPS WERE TAKEN?

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 trip</td>
<td>15.7%</td>
<td>16.0%</td>
</tr>
<tr>
<td>2 trips</td>
<td>16.0%</td>
<td>16.0%</td>
</tr>
<tr>
<td>3 trips</td>
<td>11.8%</td>
<td>11.8%</td>
</tr>
<tr>
<td>4–5 trips</td>
<td>19.3%</td>
<td>19.3%</td>
</tr>
<tr>
<td>6–10 trips</td>
<td>20.8%</td>
<td>20.8%</td>
</tr>
<tr>
<td>&gt;10 trips</td>
<td>16.3%</td>
<td>16.3%</td>
</tr>
</tbody>
</table>

Most day-trips were to South Iceland, followed by West Iceland, Reykjanes, Greater Reykjavík and North Iceland.

### WHERE WERE DAY-TRIPS TAKEN IN 2015?

<table>
<thead>
<tr>
<th>Region</th>
<th>Took a daytrip</th>
<th>Average no. of trips</th>
</tr>
</thead>
<tbody>
<tr>
<td>South</td>
<td>58.5%</td>
<td>4.7</td>
</tr>
<tr>
<td>West</td>
<td>33.5%</td>
<td>3.5</td>
</tr>
<tr>
<td>Reykjanes</td>
<td>30.2%</td>
<td>4.9</td>
</tr>
<tr>
<td>Capital Region</td>
<td>26.2%</td>
<td>8.2</td>
</tr>
<tr>
<td>North</td>
<td>24.6%</td>
<td>4.6</td>
</tr>
<tr>
<td>East</td>
<td>7.5%</td>
<td>4.2</td>
</tr>
<tr>
<td>Highlands</td>
<td>5.4%</td>
<td>3.9</td>
</tr>
<tr>
<td>Westfjords</td>
<td>4.2%</td>
<td>4.0</td>
</tr>
</tbody>
</table>

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

### LOCATIONS VISITED ON DAY-TRIPS IN 2015

Of the 56 locations asked about in various part of Iceland, the following were most often visited.

### WHICH AREAS/PLACES WERE VISITED ON DAY-TRIPS?

<table>
<thead>
<tr>
<th>Location</th>
<th>2015</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Þingvellir</td>
<td>30.2%</td>
<td></td>
</tr>
<tr>
<td>Capital Region</td>
<td>26.2%</td>
<td>22.8%</td>
</tr>
<tr>
<td>Gullfoss/Geysir</td>
<td>24.3%</td>
<td>23.4%</td>
</tr>
<tr>
<td>Reykjanesbær</td>
<td>19.6%</td>
<td>19.0%</td>
</tr>
<tr>
<td>Eyrarbakki</td>
<td>19.0%</td>
<td>19.0%</td>
</tr>
<tr>
<td>Borgarnes</td>
<td>19.0%</td>
<td>19.0%</td>
</tr>
<tr>
<td>Hvallfjörður</td>
<td>18.1%</td>
<td>18.1%</td>
</tr>
<tr>
<td>Grindavik</td>
<td>15.6%</td>
<td></td>
</tr>
<tr>
<td>Akranes</td>
<td>14.0%</td>
<td></td>
</tr>
<tr>
<td>Akureyri</td>
<td>13.4%</td>
<td></td>
</tr>
<tr>
<td>Þrisuvik</td>
<td></td>
<td>13.6%</td>
</tr>
<tr>
<td>Reykjanes lighthouse etc.</td>
<td>12.8%</td>
<td></td>
</tr>
<tr>
<td>Húsafell/Reykolt</td>
<td>11.1%</td>
<td>11.0%</td>
</tr>
<tr>
<td>Sandgerði</td>
<td>11.0%</td>
<td></td>
</tr>
<tr>
<td>Siglujörður</td>
<td>9.9%</td>
<td>9.6%</td>
</tr>
<tr>
<td>Mývatn</td>
<td>9.6%</td>
<td>9.6%</td>
</tr>
<tr>
<td>Húsavík</td>
<td>9.4%</td>
<td>9.4%</td>
</tr>
<tr>
<td>Skógar</td>
<td>9.4%</td>
<td>9.4%</td>
</tr>
<tr>
<td>Skagafjörður</td>
<td>9.2%</td>
<td></td>
</tr>
<tr>
<td>Westmann-Islands</td>
<td>8.7%</td>
<td>10.8%</td>
</tr>
<tr>
<td>Snæfellsnes National park</td>
<td>8.1%</td>
<td>9.0%</td>
</tr>
<tr>
<td>Blue lagoon</td>
<td>8.0%</td>
<td>8.0%</td>
</tr>
<tr>
<td>Stykkishólmur</td>
<td>6.7%</td>
<td>5.8%</td>
</tr>
</tbody>
</table>

*There were separate queries for Þingvellir and Geysir/Gulfoss for the first time in January 2016.
DOMESTIC TRAVELS¹

LENGTH OF STAY IN ICELAND
Approximately 85% travelled domestically in 2015, on average six times. Just over a third went on 1–2 trips, just more a third on 3–5 trips and just less than a third on six or more.

HOW MANY TRIPS WERE TAKEN?

<table>
<thead>
<tr>
<th>Number of Trips</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 trip</td>
<td>15.8%</td>
<td>15.5%</td>
</tr>
<tr>
<td>2 trips</td>
<td>20.0%</td>
<td>15.1%</td>
</tr>
<tr>
<td>3 trips</td>
<td>16.1%</td>
<td>21.4%</td>
</tr>
<tr>
<td>4-5 trips</td>
<td>19.0%</td>
<td>23.6%</td>
</tr>
<tr>
<td>6-10 trips</td>
<td>16.9%</td>
<td>26.9%</td>
</tr>
<tr>
<td>&gt;10 trips</td>
<td>12.2%</td>
<td>16.9%</td>
</tr>
</tbody>
</table>

July was the most popular month for trips in 2015, closely followed by August and June. Fewer travelled at other times.

IN WHICH MONTH WAS THE TRIP TAKEN?¹

<table>
<thead>
<tr>
<th>Month</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>J</td>
<td>11.7%</td>
<td>19.1%</td>
</tr>
<tr>
<td>F</td>
<td>15.5%</td>
<td>16.0%</td>
</tr>
<tr>
<td>M</td>
<td>15.1%</td>
<td>16.0%</td>
</tr>
<tr>
<td>A</td>
<td>21.4%</td>
<td>23.6%</td>
</tr>
<tr>
<td>M</td>
<td>23.6%</td>
<td>19.1%</td>
</tr>
<tr>
<td>J</td>
<td>49.8%</td>
<td>58.2%</td>
</tr>
<tr>
<td>J</td>
<td>68.6%</td>
<td>58.2%</td>
</tr>
<tr>
<td>A</td>
<td>26.9%</td>
<td>16.9%</td>
</tr>
<tr>
<td>S</td>
<td>19.1%</td>
<td>16.0%</td>
</tr>
<tr>
<td>O</td>
<td>16.0%</td>
<td>16.0%</td>
</tr>
<tr>
<td>N</td>
<td>16.9%</td>
<td>16.9%</td>
</tr>
<tr>
<td>D</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

OVERNIGHT STAYS BY REGION
The average duration in 2015 was 14.7 nights, one night less than in 2014. Approximately 30% was less than a week, 28% 1–2 weeks, 23% 2–3 weeks and 19.5% more than 3 weeks. The findings on length of stay by region show that around half of guest nights were spent in South Iceland and North Iceland in 2015, similar to 2014.

ACCOMMODATION OPTIONS USED DURING TRAVEL
The majority stayed with friends or relatives, in a tent, trailer tent or motor home and in summer cottages or privately owned apartments. Stays in cottages or apartments owned by associations were also extensively used, while hotels and guesthouses came thereafter. Other forms of accommodation were less used.

WHAT ACCOMMODATION WAS USED WHEN TRAVELLING?

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>2015</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stayed with friends or relatives</td>
<td>45.0%</td>
<td></td>
</tr>
<tr>
<td>Tent/trailer/motor home</td>
<td>40.9%</td>
<td></td>
</tr>
<tr>
<td>Privately owned summer cottage or apartment</td>
<td>37.5%</td>
<td></td>
</tr>
<tr>
<td>Association-owned holiday cottage</td>
<td>34.4%</td>
<td></td>
</tr>
<tr>
<td>Hotel/guesthouse</td>
<td>28.5%</td>
<td></td>
</tr>
</tbody>
</table>
### REGIONS AND PLACES VISITED BY ICELANDERS

#### MOST VISITED DESTINATIONS

Of the 56 locations specifically mentioned in the survey carried out by the Tourist Board, the following were most visited in 2015:

<table>
<thead>
<tr>
<th>Rank</th>
<th>Location</th>
<th>2014 (%)</th>
<th>2015 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Akureyri</td>
<td>41.3%</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Capital Region</td>
<td>24.3%</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Borgarnes</td>
<td>23.4%</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Pingvellir</td>
<td>20.4%</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Geysir/Gullfoss</td>
<td>19.5%</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Skagafjörður</td>
<td>17.7%</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Húsafell/Reykholts</td>
<td>16.4%</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Egilsstaðir/Hallormsstaður</td>
<td>15.7%</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Siglufjörður</td>
<td>13.9%</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Snæfellshúslurs National Park</td>
<td>13.3%</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Stykkishólmur</td>
<td>13.1%</td>
<td></td>
</tr>
</tbody>
</table>

### Regions and Places Visited by Icelanders

<table>
<thead>
<tr>
<th>Region</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>South</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Capital Region</td>
<td>61.8%</td>
<td>61.8%</td>
</tr>
<tr>
<td>North</td>
<td>52.3%</td>
<td>52.3%</td>
</tr>
<tr>
<td>West</td>
<td>45.7%</td>
<td>45.7%</td>
</tr>
<tr>
<td><strong>East</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reykjavik Peninsula</td>
<td>11.4%</td>
<td>11.1%</td>
</tr>
<tr>
<td>Reykjanestad</td>
<td>8.9%</td>
<td>8.9%</td>
</tr>
<tr>
<td>Grundavik</td>
<td>5.1%</td>
<td>5.4%</td>
</tr>
<tr>
<td>Sandgerði</td>
<td>2.6%</td>
<td>3.9%</td>
</tr>
<tr>
<td>Reykjanestad lighthouse &amp; surr.</td>
<td>2.3%</td>
<td>2.9%</td>
</tr>
<tr>
<td>Krísuvik</td>
<td>1.9%</td>
<td>2.3%</td>
</tr>
<tr>
<td>Blue Lagoon</td>
<td>2.6%</td>
<td>2.0%</td>
</tr>
<tr>
<td><strong>West</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Borgarnes</td>
<td>23.5%</td>
<td>24.3%</td>
</tr>
<tr>
<td>Húsfell/Reykholts</td>
<td>12.2%</td>
<td>16.4%</td>
</tr>
<tr>
<td>Snæfellshúslurs National Park</td>
<td>9.5%</td>
<td>13.3%</td>
</tr>
<tr>
<td>Hvalfjörður</td>
<td>12.7%</td>
<td>11.2%</td>
</tr>
<tr>
<td>Akranes</td>
<td>10.6%</td>
<td>9.5%</td>
</tr>
<tr>
<td>Dalir</td>
<td>10.8%</td>
<td>9.4%</td>
</tr>
<tr>
<td><strong>Westfjords</strong></td>
<td>20.7%</td>
<td>19.6%</td>
</tr>
<tr>
<td>Isafjörður</td>
<td>11.2%</td>
<td>11.4%</td>
</tr>
<tr>
<td>Hólmavik/Strandir</td>
<td>9.0%</td>
<td>8.2%</td>
</tr>
<tr>
<td>Patreksfjörður</td>
<td>7.1%</td>
<td>6.5%</td>
</tr>
<tr>
<td>Hafnseyri</td>
<td>2.2%</td>
<td>3.3%</td>
</tr>
<tr>
<td>Látrabjarg</td>
<td>3.1%</td>
<td>3.0%</td>
</tr>
<tr>
<td>Djúpavik</td>
<td>3.4%</td>
<td>2.1%</td>
</tr>
<tr>
<td>Hornstrandir</td>
<td>1.9%</td>
<td>2.0%</td>
</tr>
<tr>
<td>Flatey in Breidafjörður</td>
<td>1.7%</td>
<td>1.7%</td>
</tr>
<tr>
<td><strong>North</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Akureyri</td>
<td>49.6%</td>
<td>41.3%</td>
</tr>
<tr>
<td>Skagafljóður</td>
<td>20.5%</td>
<td>17.7%</td>
</tr>
<tr>
<td>Siglufjörður</td>
<td>16.9%</td>
<td>13.9%</td>
</tr>
<tr>
<td>Mývatn</td>
<td>17.8%</td>
<td>11.5%</td>
</tr>
<tr>
<td>Húsfavík</td>
<td>18.4%</td>
<td>10.4%</td>
</tr>
<tr>
<td>Hvammstangi</td>
<td>7.7%</td>
<td>7.2%</td>
</tr>
<tr>
<td>Ásbyrgi</td>
<td>8.8%</td>
<td>6.1%</td>
</tr>
<tr>
<td>Dettifoss</td>
<td>7.0%</td>
<td>5.9%</td>
</tr>
<tr>
<td>Póðshófn</td>
<td>3.8%</td>
<td>3.2%</td>
</tr>
</tbody>
</table>

---

*There were separate queries for Pingvellir and Geysir/Gullfoss for the first time in January 2016.*
RECREATIONAL ACTIVITIES
The most popular recreational activities paid for on trips in 2015 were: swimming and nature baths, museums and exhibitions, concerts and theatre, fishing, boat trips and golf. Travellers partook of other recreational options, such as wellness programmes, various sightseeing tours, whale watching, horse riding tours and snowmobile trips, to a lesser extent.

WHAT RECREATIONAL ACTIVITIES WERE PAID FOR WHEN

<table>
<thead>
<tr>
<th>Activity</th>
<th>2015</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Swimming/nature baths</td>
<td>74.8%</td>
<td></td>
</tr>
<tr>
<td>Museums/exhibitions</td>
<td>37.8%</td>
<td>20.5%</td>
</tr>
<tr>
<td>Theatre/concerts</td>
<td>17.2%</td>
<td>11.5%</td>
</tr>
<tr>
<td>Fishing</td>
<td>8.2%</td>
<td>5.6%</td>
</tr>
<tr>
<td>Golf</td>
<td>5.8%</td>
<td>5.6%</td>
</tr>
<tr>
<td>Guided sight-seeing tours</td>
<td>4.6%</td>
<td>5.8%</td>
</tr>
<tr>
<td>Wellness</td>
<td>20.5%</td>
<td>11.5%</td>
</tr>
<tr>
<td>Hiking/mountain trips</td>
<td>17.2%</td>
<td>8.2%</td>
</tr>
</tbody>
</table>

QUALITY AWARENESS
More than a fifth of respondents to the 2016 questionnaire were of the opinion that a recognised quality certification was a rather important or very important factor when it came to choosing a tour operator.

WHAT KIND OF TRIPS ARE PLANNED FOR 2016?

<table>
<thead>
<tr>
<th>Type of Trip</th>
<th>2016 (Jan)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summer cottage trip</td>
<td>58.5%</td>
</tr>
<tr>
<td>Visit friends and relatives</td>
<td>50.9%</td>
</tr>
<tr>
<td>Travel with friends</td>
<td>31.6%</td>
</tr>
<tr>
<td>City/town break</td>
<td>27.7%</td>
</tr>
<tr>
<td>Chasing good weather</td>
<td>24.2%</td>
</tr>
<tr>
<td>Outdoor recreation</td>
<td>18.5%</td>
</tr>
<tr>
<td>Work-related travel/conference</td>
<td>13.6%</td>
</tr>
<tr>
<td>Skiing trip</td>
<td>12.4%</td>
</tr>
<tr>
<td>Sports trip</td>
<td>8.2%</td>
</tr>
<tr>
<td>Cultural/health/spa trip</td>
<td>6.5%</td>
</tr>
<tr>
<td>Educational trip</td>
<td>5.1%</td>
</tr>
<tr>
<td>City break</td>
<td>41.8%</td>
</tr>
<tr>
<td>Sun-seeking holiday</td>
<td>28.4%</td>
</tr>
<tr>
<td>Business trip</td>
<td>16.5%</td>
</tr>
<tr>
<td>Skiing trip</td>
<td>2.3%</td>
</tr>
</tbody>
</table>
**SUBJECTIVE ASSESSMENT**

**EFFECTS OF TOURISM AND FOREIGN TRAVELLERS**

An increasing number believe that tourism causes too much of a strain on Icelandic nature, or 75% compared to 66.3% a year ago. This year, around 62% believed that tourists had increased Icelanders' interest in Icelandic nature, slightly more than in the 2015 survey. A similar number, around 52%, believed this year that tourists had increased Icelanders' interest in their own culture. There is also little difference response between years as to whether tourism has created attractive job opportunities and whether tourism has led to a wider range of services utilised by the respondents.

![Bar chart showing assessment of the effects of tourism](chart.png)

**TOURISM DEVELOPMENT**

Just more than a fifth of respondents were of the opinion that development in the tourism industry should focus on developing infrastructure, organisation and improved infrastructure. Just less than a third consider fee-charging and tax issues important, just more than a quarter consider important various issues related to state involvement in tourism, monitoring, support, marketing and education, and a quarter consider important issues regarding the road network and public transport generally. Other factors include management of tourist numbers and distribution, lavatory facilities, pricing and the proposed “Nature Pass”.

![Bar chart showing what should the state focus on to promote development of Icelandic tourism](chart2.png)

Survey among Icelanders may be found [on ITB website](https://www.itb.org).
SURVEY AMONG TOURISM COMPANIES

In early 2016, the Icelandic Tourist Board enlisted Gallup to conduct an Internet survey among Icelandic tourism companies in order to assess their performance in 2015 and the outlook for 2016. The survey was sent to 1,680 e-mail addresses from the Board’s database. The response ratio was 35%. The results reflect the responses from individual companies and are analysed according to type of activity, location, number of employees, ratio of foreign companies, turnover and whether the company is operated during part of the year or year-round.

The sample
The sample extended to companies in the following categories obtained from the Icelandic Tourist Board’s database:

LOCATION
36.3% of the companies were in the Capital Region, 19.5% in North Iceland, 16.9% in South Iceland, 7.7% in West Iceland, 7.7% in the Westfjords, 6.5% in East Iceland and 5.5% in Reykjanes.

LENGTH OF TIME IN OPERATION
38.7% of the companies had been in operation for more than 10 years, 22.5% for 6–10 years, 34.1% for 1–5 years and 4.6% for less than a year.

TIME OF YEAR IN OPERATION
77.6% of the companies were operated year-round and 27.4% during part of the year.

TYPE OF OPERATION
20.1% of respondents were guesthouses or hostels, 16.4% hotels, 13.1% other accommodation, 12% package/jeep/glacier/boat tours, 9.5% day-trips, 8.9% nature experiences, 8.0% communications, 6.6% travel agencies and tour organisers and 5.1% catering and other services.

COMPANY’S 2015 TURNOVER COMPARED TO 2014
Most said that there was more turnover in all seasons in 2015, compared to 2014, mostly due to increased business with foreign travellers.

WAS THE TURNOVER IN WINTER/SPRING/SUMMER/AUTUMN 2015 GREATER, SIMILAR OR LESS THAN IN 2014?

<table>
<thead>
<tr>
<th>Season</th>
<th>More</th>
<th>Similar</th>
<th>Less</th>
</tr>
</thead>
<tbody>
<tr>
<td>Winter</td>
<td>58.3%</td>
<td>32.2%</td>
<td>9.5%</td>
</tr>
<tr>
<td>Spring</td>
<td>60.1%</td>
<td>34.3%</td>
<td>5.5%</td>
</tr>
<tr>
<td>Summer</td>
<td>63.8%</td>
<td>31.1%</td>
<td>5.1%</td>
</tr>
<tr>
<td>Autumn</td>
<td>67.8%</td>
<td>27.5%</td>
<td>4.7%</td>
</tr>
</tbody>
</table>

WAS TURNOVER DUE TO TRANSACTIONS WITH FOREIGN TRAVELLERS AND ICELANDERS GREATER, SIMILAR OR LESS IN 2015 THAN IN 2014?

<table>
<thead>
<tr>
<th>Category</th>
<th>More</th>
<th>Similar</th>
<th>Less</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foreign travellers</td>
<td>74.9%</td>
<td>22.3%</td>
<td>3.8%</td>
</tr>
<tr>
<td>Icelanders</td>
<td>19.4%</td>
<td>63.8%</td>
<td>17.0%</td>
</tr>
</tbody>
</table>

TURNOVER AND MARGIN 2016
The vast majority (84.3%) believed that turnover would increase in 2016 compared to 2015, and the same applies to the companies' margin, although the number of those who believed that it would increase was slightly lower, or 69.1%.

DO YOU BELIEVE THAT THE COMPANY’S TURNOVER AND MARGIN WILL INCREASE, STAY THE SAME OR DECREASE IN 2016 COMPARED TO 2015?

<table>
<thead>
<tr>
<th>Component</th>
<th>Increase</th>
<th>Stay the same</th>
<th>Decrease</th>
</tr>
</thead>
<tbody>
<tr>
<td>Turnover</td>
<td>84.3%</td>
<td>14.0%</td>
<td>2.7%</td>
</tr>
<tr>
<td>Margin (EBITDA)</td>
<td>69.1%</td>
<td>26.6%</td>
<td>4.3%</td>
</tr>
</tbody>
</table>
DEMAND IN 2016
When asked about the demand for the companies' products and services by market regions, most believed that there would be a great increase in demand (+70%) due to travellers from North America, Asia and the UK and a significant increase (+45–65%) due to travellers from Central and South Europe and other market regions. Most, however, believed that demand from Icelanders would stay the same.

DO YOU BELIEVE THAT DEMAND FOR THE COMPANY'S PRODUCTS AND SERVICES FROM THE FOLLOWING REGIONS WILL INCREASE, STAY THE SAME OR DECREASE IN 2016?

<table>
<thead>
<tr>
<th>Region</th>
<th>Increase</th>
<th>Stay the same</th>
<th>Decrease</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Nordic countries</td>
<td>45.2%</td>
<td>49.9%</td>
<td>5.0%</td>
</tr>
<tr>
<td>The United Kingdom</td>
<td>71.1%</td>
<td>27.0%</td>
<td>1.9%</td>
</tr>
<tr>
<td>Central/South Europe</td>
<td>61.5%</td>
<td>35.7%</td>
<td>2.8%</td>
</tr>
<tr>
<td>North America</td>
<td>73.7%</td>
<td>23.6%</td>
<td>2.7%</td>
</tr>
<tr>
<td>Asia</td>
<td>71.6%</td>
<td>26.3%</td>
<td>2.1%</td>
</tr>
<tr>
<td>Other market region</td>
<td>52.3%</td>
<td>44.4%</td>
<td>3.3%</td>
</tr>
<tr>
<td>Icelanders</td>
<td>32.5%</td>
<td>61.7%</td>
<td>5.8%</td>
</tr>
</tbody>
</table>

DEMAND IN 2016
Almost half of the respondents believed that their company would have to increase seasonal or part-time employees, and about a third believed that they would have to increase full-time employees.

DO YOU BELIEVE THAT THE COMPANY WILL HAVE AN INCREASED OR DECREASED NUMBER OF EMPLOYEES IN 2016?

<table>
<thead>
<tr>
<th>Employment Type</th>
<th>Increase</th>
<th>Stay the same</th>
<th>Decrease</th>
</tr>
</thead>
<tbody>
<tr>
<td>In year-round employment</td>
<td>32.3%</td>
<td>65.7%</td>
<td>2.0%</td>
</tr>
<tr>
<td>In seasonal or part-time employment</td>
<td>48.2%</td>
<td>48.6%</td>
<td>3.2%</td>
</tr>
</tbody>
</table>

FACTORS THAT AFFECTED THE COMPANY'S PERFORMANCE IN 2015
Respondents were asked to name three factors that they believed had a positive effect on the company's performance during the year and number them in order of importance. Likewise, they had to name three factors that they believed had a negative effect. The following was most frequently mentioned.

POSITIVE FACTORS

<table>
<thead>
<tr>
<th>Factor</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increased number of customers</td>
<td>46.4%</td>
</tr>
<tr>
<td>More frequent flights</td>
<td>35.2%</td>
</tr>
<tr>
<td>Marketing of the company</td>
<td>34.7%</td>
</tr>
<tr>
<td>Positive coverage</td>
<td>28.8%</td>
</tr>
<tr>
<td>Travellers' expectations/different travel...</td>
<td>18.3%</td>
</tr>
<tr>
<td>New travel products...</td>
<td>16.2%</td>
</tr>
<tr>
<td>Supply of services in the region</td>
<td>10.5%</td>
</tr>
<tr>
<td>General marketing from the state</td>
<td>9.9%</td>
</tr>
<tr>
<td>Specialised marketing campaigns</td>
<td>7.9%</td>
</tr>
<tr>
<td>Improved access to the region</td>
<td>6.6%</td>
</tr>
</tbody>
</table>

NEGATIVE FACTORS

<table>
<thead>
<tr>
<th>Factor</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increased operating costs</td>
<td>31.7%</td>
</tr>
<tr>
<td>The weather</td>
<td>20.8%</td>
</tr>
<tr>
<td>Exchange rate developments</td>
<td>17.4%</td>
</tr>
<tr>
<td>Transportation in general</td>
<td>16.7%</td>
</tr>
<tr>
<td>The competition environment</td>
<td>14.3%</td>
</tr>
<tr>
<td>Little service supply</td>
<td>13.0%</td>
</tr>
<tr>
<td>Lack of skilled workers</td>
<td>12.2%</td>
</tr>
<tr>
<td>Access to finance</td>
<td>12.1%</td>
</tr>
<tr>
<td>Access to the region</td>
<td>11.7%</td>
</tr>
</tbody>
</table>

The company survey is available at the Tourist Board of Iceland's website.