

TOURISM IN ICELAND IN FIGURES

Icelandic Tourist Board

February 2010



Tourism in Iceland in figures

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TOURISM IN ICELAND

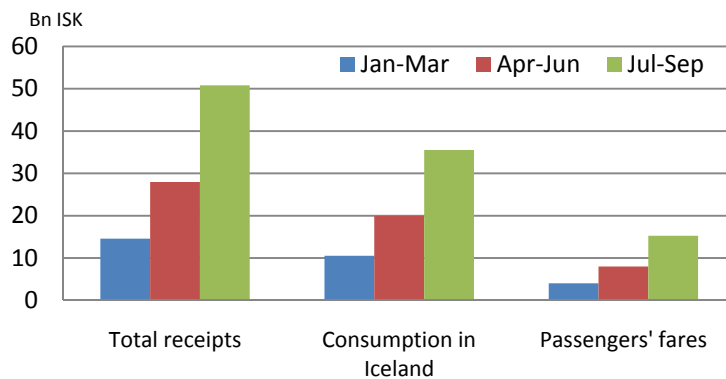
Tourism in Iceland



The share of tourism in Iceland's GDP between 2000 and 2007 was, on average, 4.6%. It was highest in 2002 (5.3%) and lowest in 2006 (4.1%).

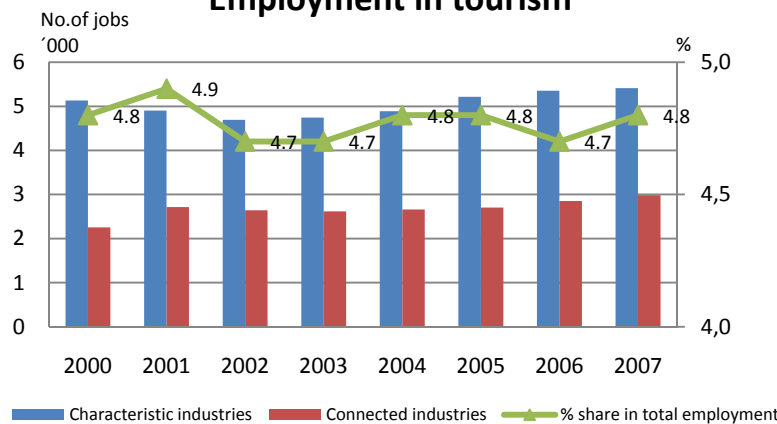
The share of tourism in Iceland's total export revenue was 16.9% in 2008. In the years between 2000 and 2008 it was, on average, 17.6%. The share was highest in 2005, or 19.5% and lowest in 2002, or 15.5%.

Foreign travel receipts and expenditures



Foreign currency revenues from international visitors according to the tourism satellite accounts are estimated to have been ISK 155bn in 2009. Having taken into account exchange rate and pricing effects, an approximately 21% real increase in foreign currency revenues during 2008-09 may be assumed. Foreign currency revenues according to the tourism satellite accounts are higher than the results of the balance on services (see graph) as they apply to more aspects in tourist services.

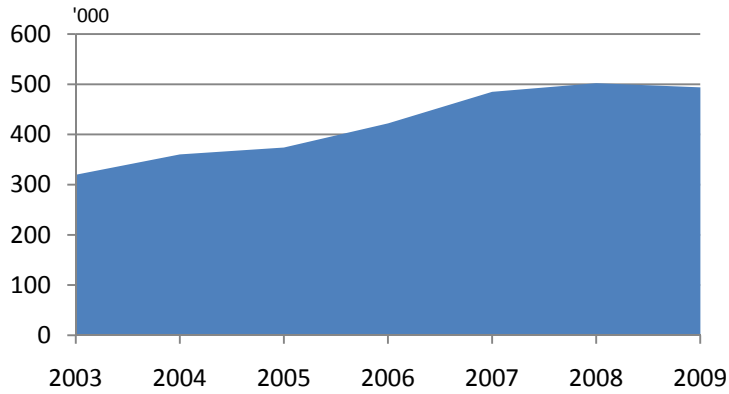
Employment in tourism



The number of jobs in 2007 was 8,400, an increase of approximately 190 from the year before. There were 5,400 jobs in characteristic tourism industries, such as accommodation and catering services, passenger transport services and travel agency occupations. Just under 3,000 jobs were in connected industries, such as retail sales, entertainment, shops, culture, recreational activities and services in connection with passenger transport.

INTERNATIONAL VISITORS TO ICELAND

Visitors to Iceland 2003-2009

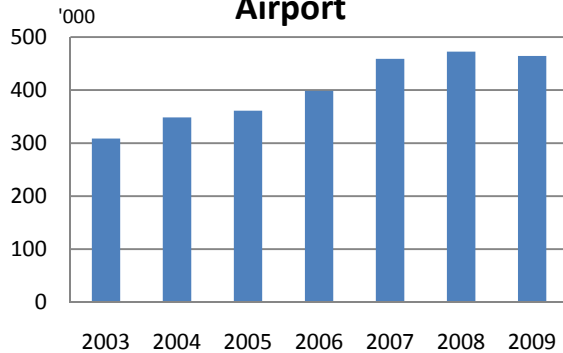


Visitors in 2009 by point of arrival

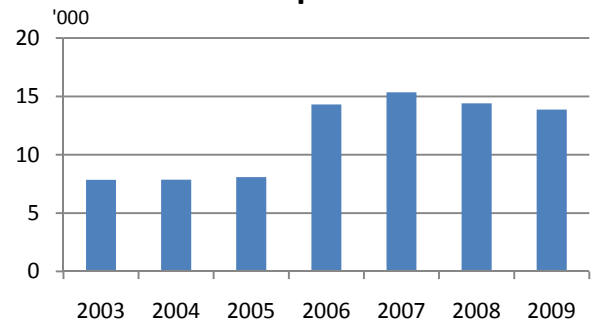
Keflavik Airport	464,536
Seyðisfjörður	13,866
Reykjavik Airport	13,823
Akureyri Airport	1,570
Egilsstaðir Airport	146
Total	493,941

Sources: Icelandic Tourist Board, Austfar, and the Reykjavik, Akureyri and Egilsstaðir Airports.

Visitors through Keflavik Airport



Visitors through Seydisfjörður Seaport



Visitors by market area

Keflavik airport

	2008	2009	Change between years (%)
Nordic countries	119,204	119,742	0.5
United Kingdom	69,982	61,619	-12.0
Central-/S-Europe	117,727	135,021	14.7
N-America	51,063	54,972	7.7
Other	114,696	93,182	-18.8
Total	472,672	464,536	-1.7

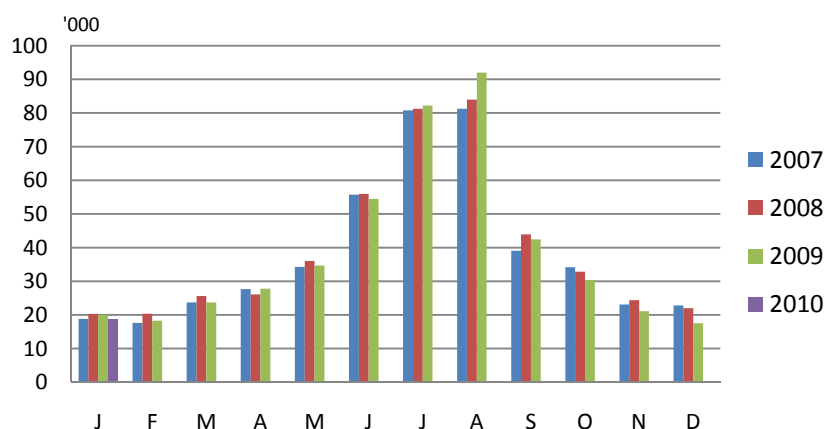
Seydisfjörður

	2008	2009	Change between years (%)
Nordic countries	4,681	3,938	-15.9
United Kingdom	511	161	-68.5
Central-/S-Europe	7,515	8,362	11.3
N-America	38	26	-31.6
Other	1,656	1,379	-16.7
Total	14,401	13,866	-3.7

Source: Icelandic Tourist Board and Austfar

DEPARTURE STATISTICS FROM KEFLAVIK AIRPORT 2007-2009

Visitors through Keflavik Airport



The Iceland Tourist Board's counting efforts in Keflavik Airport cover 95% of the total number of visitors to Iceland. The count covers all departures from the Airport, including the departure of foreign workers.

Visitors to Iceland through Keflavik Airport 2007-2009

by nationality

	2007	2008	2009	Increase/decrease between years (%)	
				2007-08	2008-09
Canada	6,296	10,568	11,063	67.9	4.7
China	9,533	5,760	5,368	-39.6	-6.8
Denmark	41,392	41,026	40,270	-0.9	-1.8
Finland	9,875	10,797	11,566	9.3	7.1
France	22,671	26,161	28,818	15.4	10.2
Germany	40,556	45,120	51,879	11.3	15.0
Italy	10,475	10,116	12,645	-3.4	25.0
Japan	6,096	6,732	7,048	10.4	4.7
Netherlands	14,405	18,756	19,262	30.2	2.7
Norway	34,779	35,122	36,485	1.0	3.9
Poland	19,020	24,227	14,340	27.4	-40.8
Spain	9,455	10,438	13,771	10.4	31.9
Sweden	33,356	32,259	31,421	-3.3	-2.6
Switzerland	6,911	7,136	8,646	3.3	21.2
United Kingdom	73,391	69,982	61,619	-4.6	-12.0
USA	51,909	40,495	43,909	-22.0	8.4
Other	68,879	77,977	66,426	13.2	-14.8
Total	458,999	472,672	464,536	3.0	-1.7

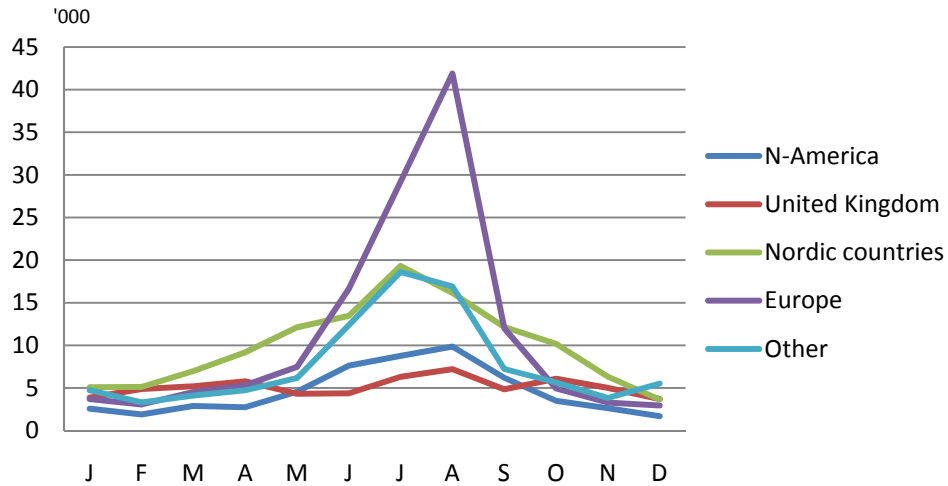
by market area

	2007	2008	2009	Increase/decrease between years (%)	
				2007-08	2008-09
Nordic countries	119,402	119,204	119,742	-0.2	0.5
United Kingdom	73,391	69,982	61,619	-4.6	-12.0
Central/South Europe	104,473	117,727	135,021	12.7	14.7
North America	58,205	51,063	54,972	-12.3	7.7
Other	103,528	114,696	93,182	10.8	-18.8
Total	458,999	472,672	464,536	3.0	-1.7

Source: Icelandic Tourist Board

INTERNATIONAL VISITORS BY MONTH 2009

Seasonal departure variations by key markets



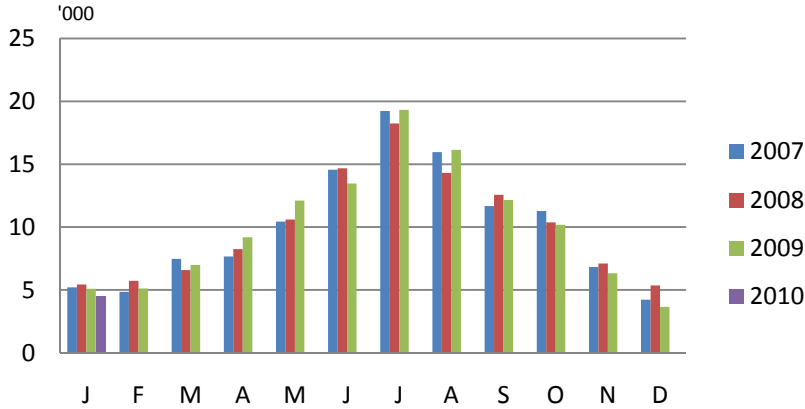
Departures through Keflavik Airport by month

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Canada	191	151	195	640	948	1606	2347	2528	1484	558	223	192	11063
China	150	116	164	242	362	822	730	1122	599	532	235	294	5368
Denmark	1910	1885	2460	3053	3345	4363	7787	6058	3451	3024	1640	1294	40270
Finland	316	322	421	644	1376	1617	2159	1824	1077	1163	399	248	11566
France	914	818	1070	1382	1775	3086	6327	8824	2249	889	746	738	28818
Germany	1482	1212	1778	2017	2996	7317	11619	14330	5375	1726	1108	919	51879
Italy	266	116	228	290	371	1284	2709	5895	817	275	197	197	12645
Japan	971	588	673	282	306	558	779	801	591	491	457	551	7048
NL	559	680	1158	1020	1621	3034	2825	3523	1837	1312	943	750	19262
Norway	1431	1746	2383	2757	3843	3967	4818	4149	4341	3480	2433	1137	36485
Poland	686	536	682	969	1142	2194	2502	1686	832	787	535	1789	14340
Spain	221	116	172	380	366	893	3021	6499	1167	540	207	189	13771
Sweden	1440	1166	1720	2733	3544	3521	4562	4111	3290	2511	1849	974	31421
CH	268	123	114	230	341	1030	2694	2826	582	198	84	156	8646
UK	3865	4881	5197	5794	4324	4377	6319	7208	4845	6088	5017	3704	61619
USA	2386	1756	2693	2105	3625	6024	6422	7329	4721	2946	2404	1498	43909
Other	2929	2064	2589	3247	4352	8796	14600	13308	5205	3851	2600	2885	66426
Total	19985	18276	23697	27785	34637	54489	82220	92021	42463	30371	21077	17515	464536

Source: Icelandic Tourist Board

INTERNATIONAL VISITORS BY MONTH 2009

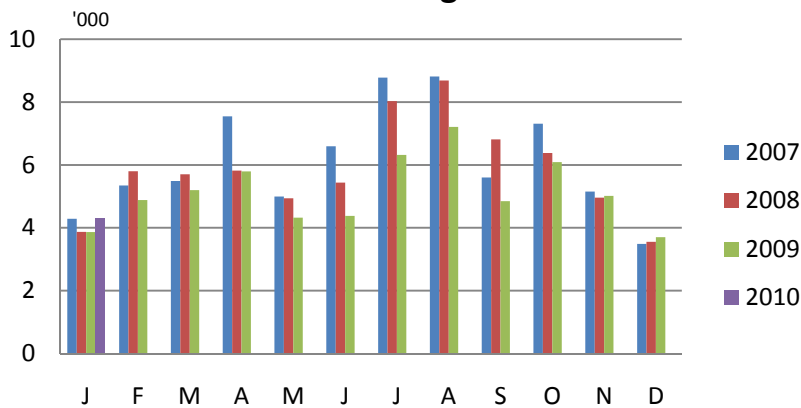
Nordic nations



Approximately 119,000 visitors have come to Iceland from the Nordic countries each year for the past three years.

Two out of every five Nordic visitors came during the summer months (Jun-Aug), a third during spring (Apr-May) or in the autumn (Sep-Oct) and a quarter during the winter months (Jan-Mar/Nov-Dec).

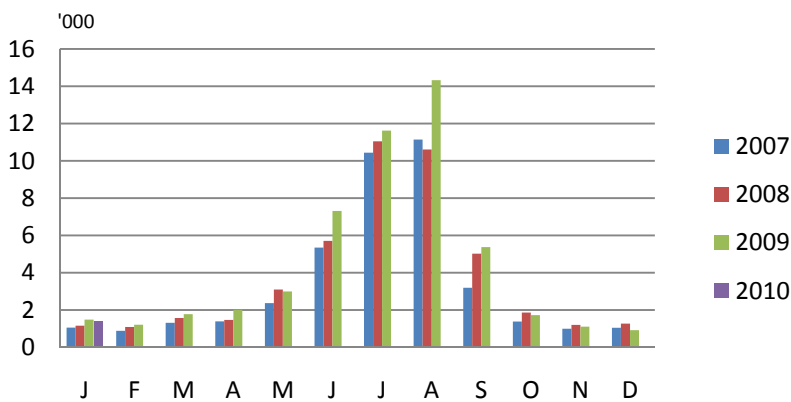
United Kingdom



In 2009, there were just under 62,000 visitors from the UK, a decrease of 16% from 2007.

A third of UK visitors came in summer, a third in spring or autumn and a third during the winter months.

Germany

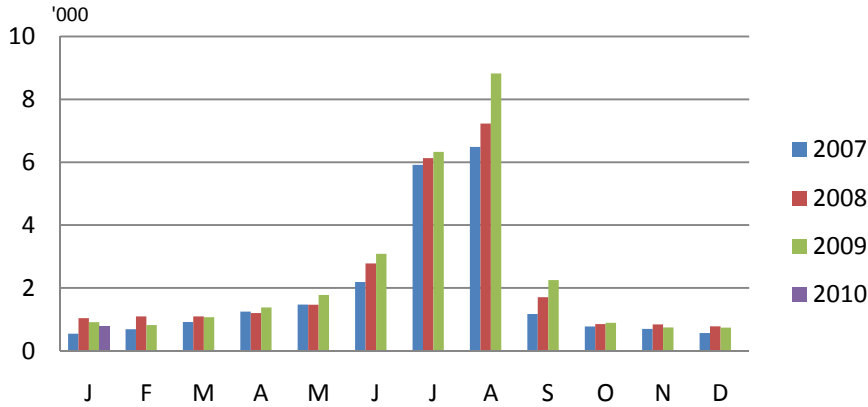


In 2009, there were 52,000 German visitors to Iceland, 28% more than in 2007 when they were approximately 40,000.

Two thirds of German visitors came during summer, approximately 20% during spring or autumn and just over 10% during the winter months.

INTERNATIONAL VISITORS BY MONTH 2009

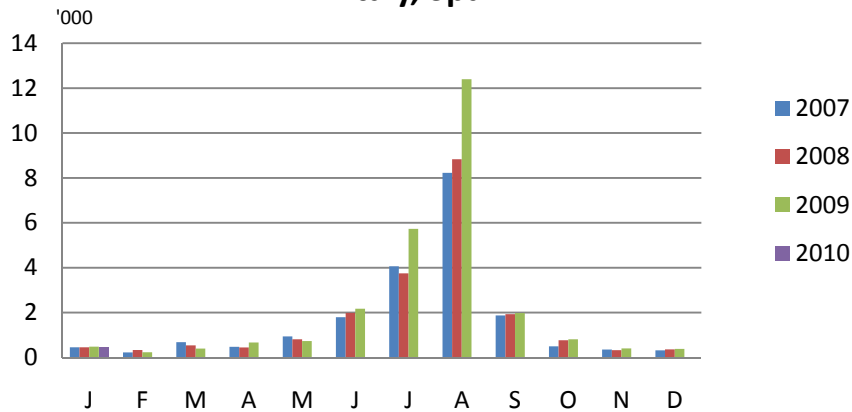
France



In 2009, there were approximately 29,000 visitors from France, an increase of 27% from 2007.

Two thirds of visitors from France came during summer, a fifth during spring or autumn and over 15% during the winter months.

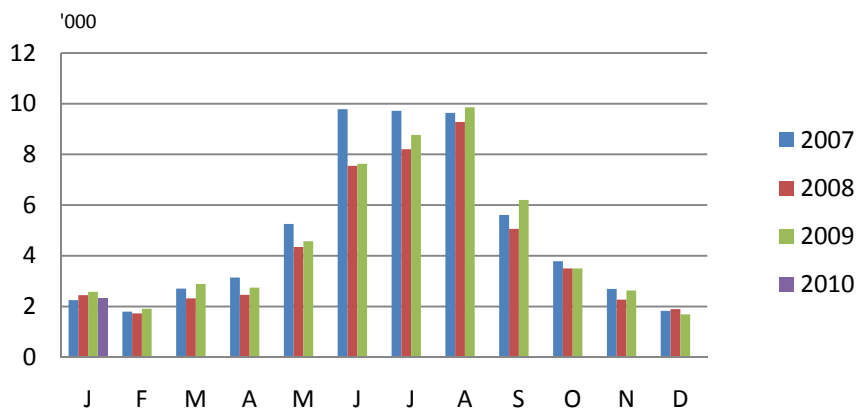
Italy, Spain



In 2009, there were approximately 26,000 visitors from Italy and Spain, an increase of 32% from 2007.

The majority of visitors from Italy and Spain (around 70%) came during the summer. Slightly less than a fifth came during spring or autumn and approximately 10% during the winter months.

N-America

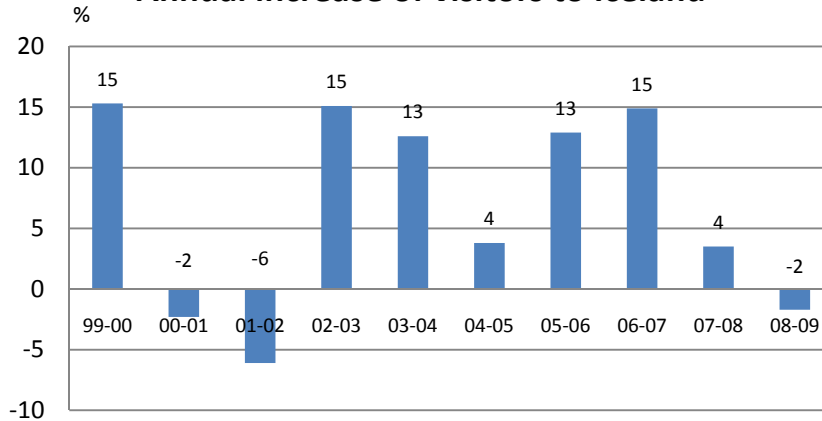


In 2009, there were approximately 55,000 visitors from North America, a decrease of 6% from 2007.

Half of the North American visitors came during summer, a third during spring or autumn and a fifth during the winter months.

ANNUAL INCREASE, FUTURE PROSPECTS AND CRUISE SHIP PASSENGERS

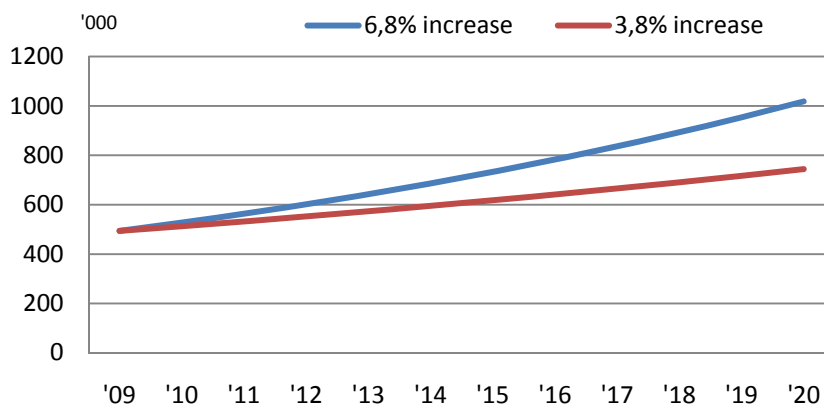
Annual increase of visitors to Iceland



The annual increase in the number of visitors to Iceland has been, on average, 6.8% over the past ten years. During this period, the increase between years has exceeded 12% on five occasions.

Source: Icelandic Tourist Board

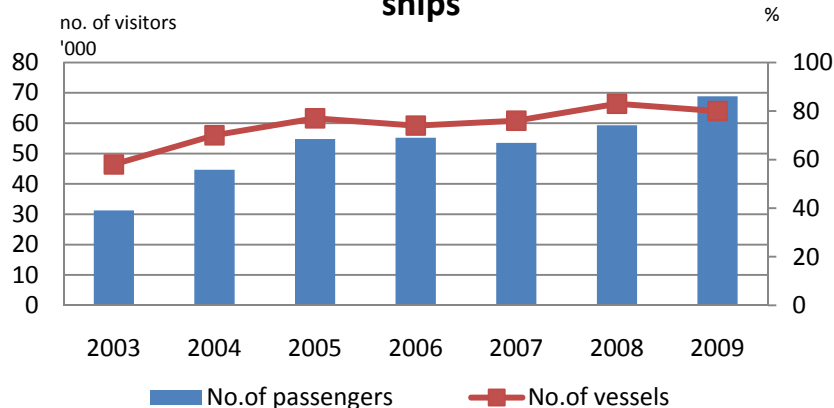
Visitors to Iceland until 2020



Assuming an annual increase of 6.8%, as has been the case in Iceland for the past ten years, we can anticipate one million visitors to Iceland in 2020. However, if account is taken of the projections of the UN World Tourism Organization (UNWTO) as regards the increase of travellers globally, we can expect 745,000 visitors to Iceland in 2020.

Source: Icelandic Tourist Board

International visitors to Reykjavík on cruise ships

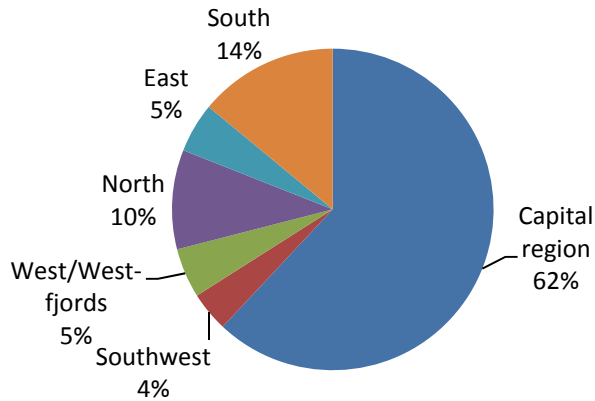


Approximately 95% of the cruise ships that visit Iceland berth in Reykjavík. In 2003, 58 cruise ships with approximately 31,000 guests berthed in Reykjavík while in 2009 the number of vessels was 80 with just under 69,000 guests.

Source: Associated Icelandic Ports (Faxaflóahafnir)

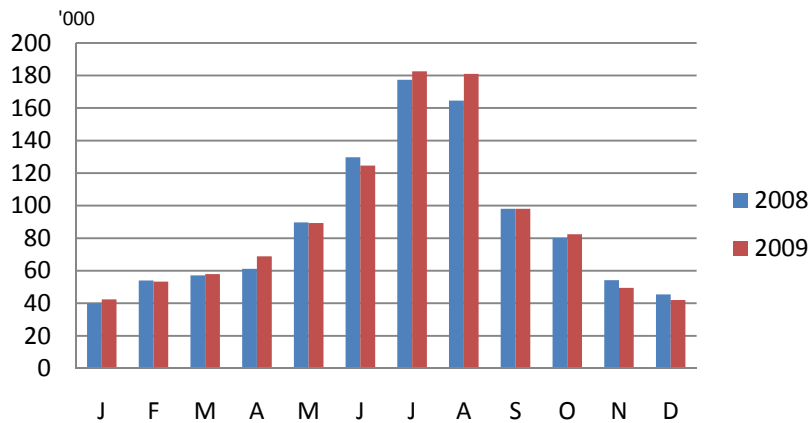
OVERNIGHT STAYS IN HOTELS 2009

Available beds in hotels 2009



In recent years there has been a considerable increase in the availability of accommodation. During summer 2009, there were 9,482 beds available in 79 hotels, which is 54.5% of the total number of beds in all available accommodation.

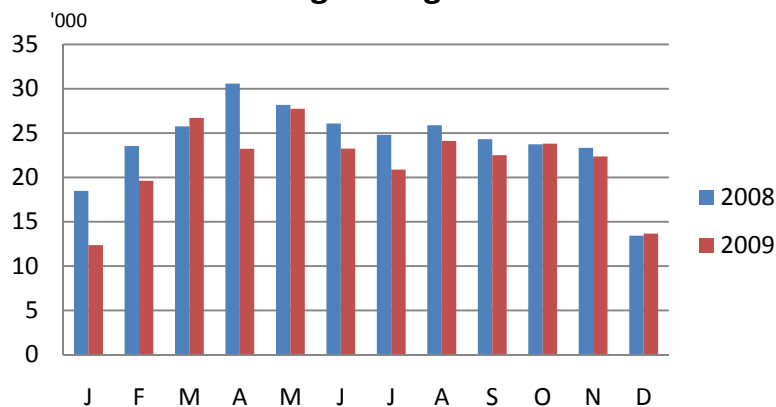
Foreign guestnights at hotels



Foreign visitors spent approximately one million nights in Iceland in 2009, 2% more overnight stays in hotels than in 2008.

Half the overnight stays in hotels were during the summer, a third during spring or autumn and just under a quarter during the winter months.

Domestic guestnights at hotels



Icelanders spent approximately 260,000 nights in hotels in Iceland in 2009, or 9.7% fewer overnight stays than the year before.

A quarter of overnight stays were spent during the summer, over a third during spring or autumn and over a third during the winter months.

INTERNATIONAL VISITORS TO ICELAND 2008-2009

GENDER (%)

Winter (Sep'08-May '09)

Male	53.6
Female	46.4

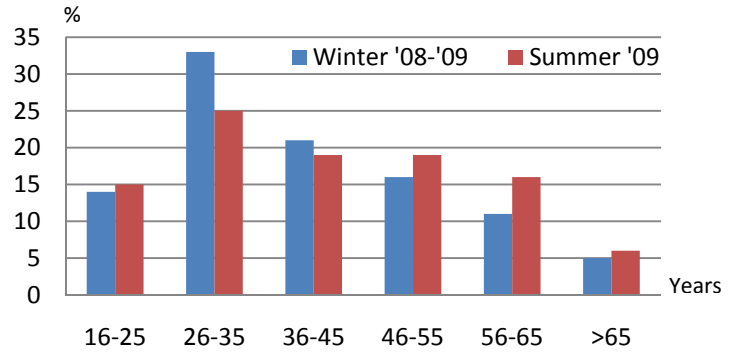
Summer (Jun-Aug'09)

Male	52.5
Female	47.5

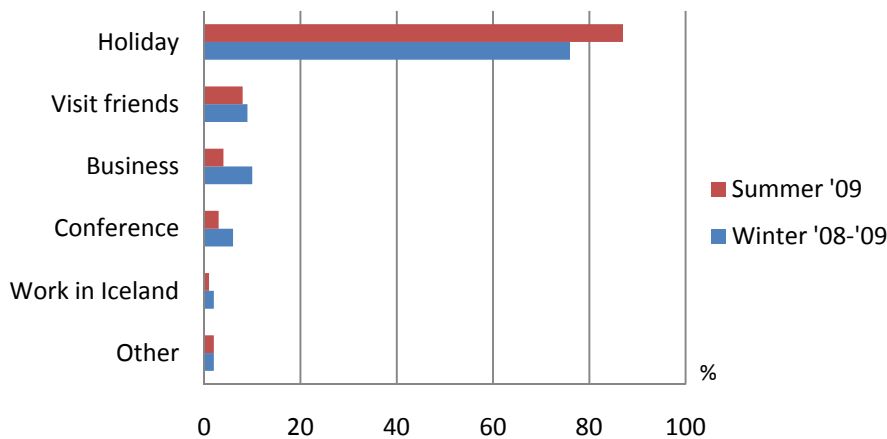
AVERAGE AGE

Winter	40
Summer	42

Age in groups

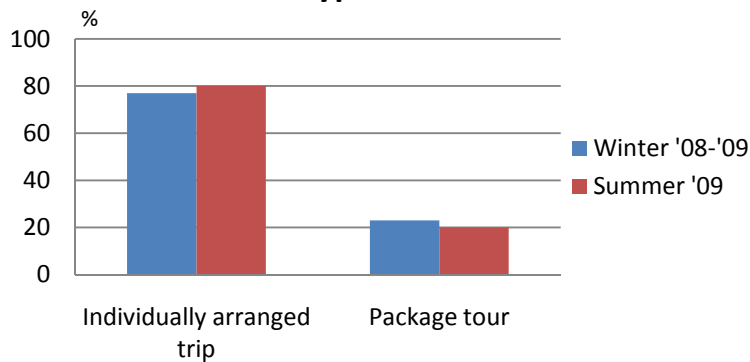


Purpose of visit



The vast majority of visitors to Iceland are on holiday. A relatively larger number come for business, conferences or work in Iceland outside the summer months rather than during summer.

Type of tour

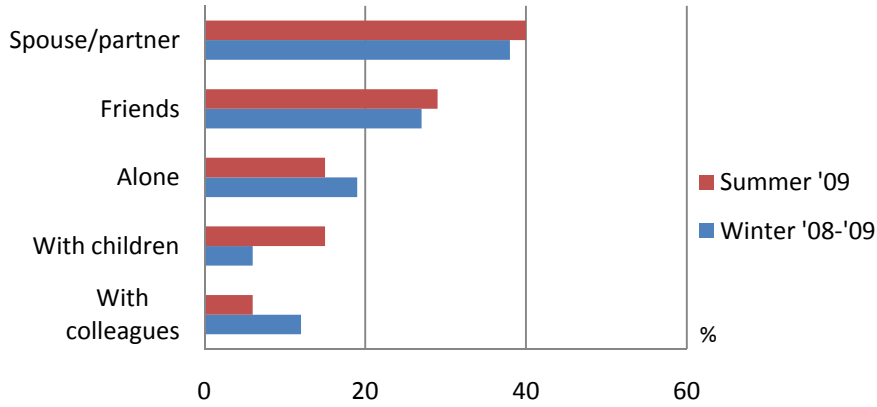


Previously visited Iceland

A fifth of the visitors who came to Iceland during winter had previously visited Iceland. 17% of summer visitors in 2009 had previously visited Iceland.

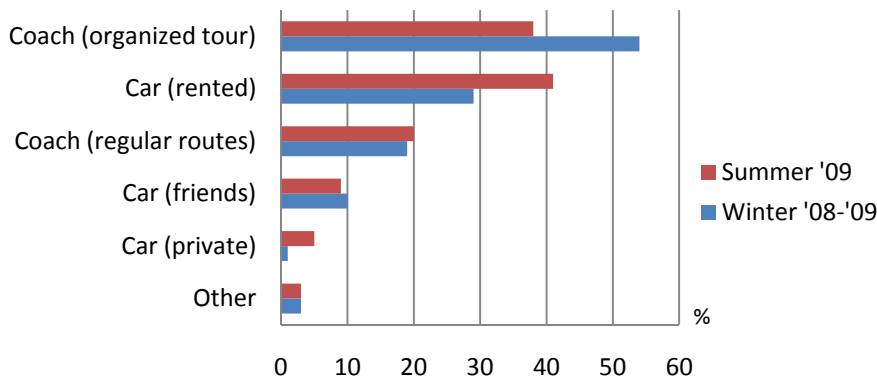
INTERNATIONAL VISITORS TO ICELAND 2008-2009

Travelling companions



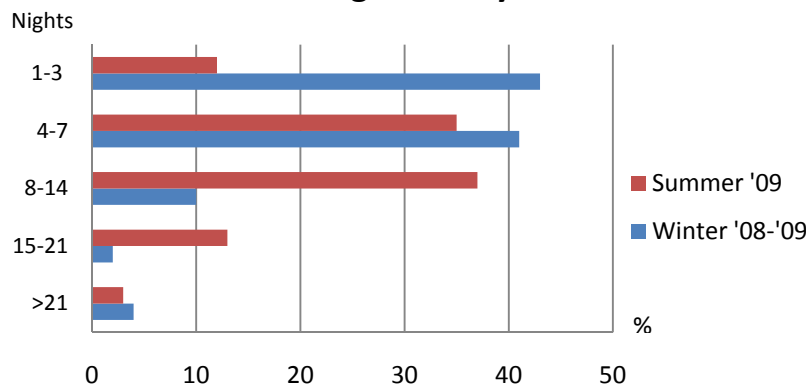
Most visitors travelled with a spouse or friends. A larger number travelled with children during summer.

Means of transport



Most visitors utilised coach services during winter while during the summer most visitors used both car rentals and coach services.

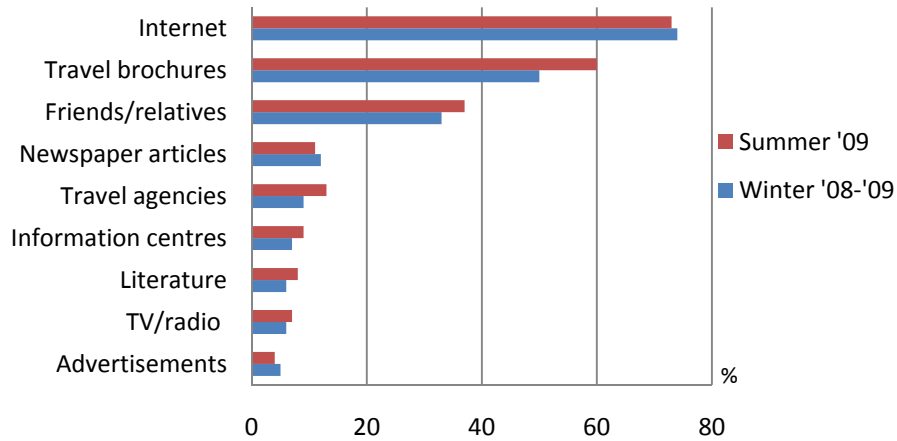
Length of stay



The average length of stay of foreign visitors was 5.5 nights during winter and 9.8 nights during summer.

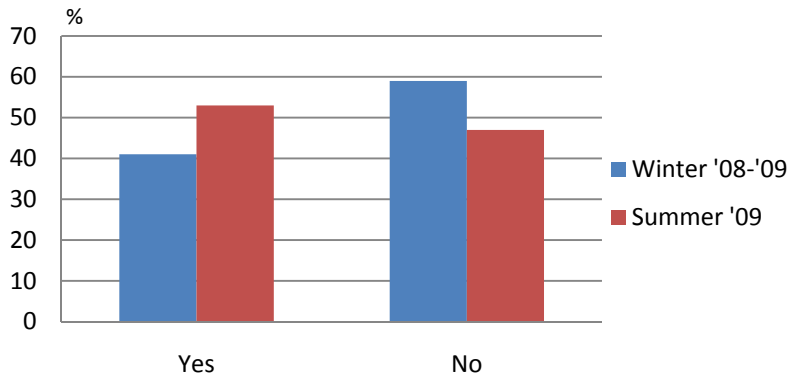
INTERNATIONAL VISITORS TO ICELAND 2008-2009

Source of information on Iceland



Use of and access to the internet continues to increase at a fast pace. More than twice the number of international visitors to Iceland obtain information about the country from the internet than was the case ten years ago.

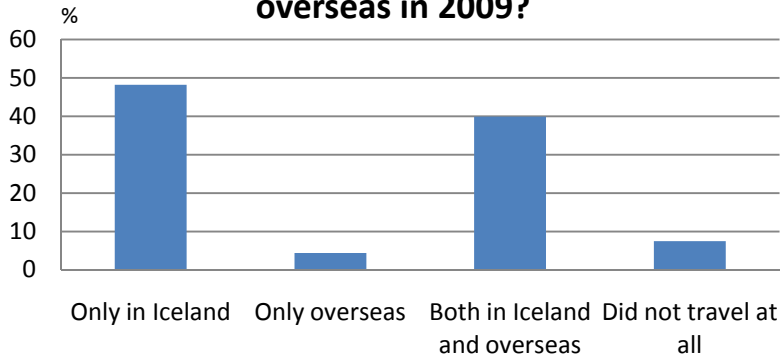
Used the services of information centres



The role of information centres in Iceland has been growing in recent years. Approximately 50% of visitors take advantage of their services.

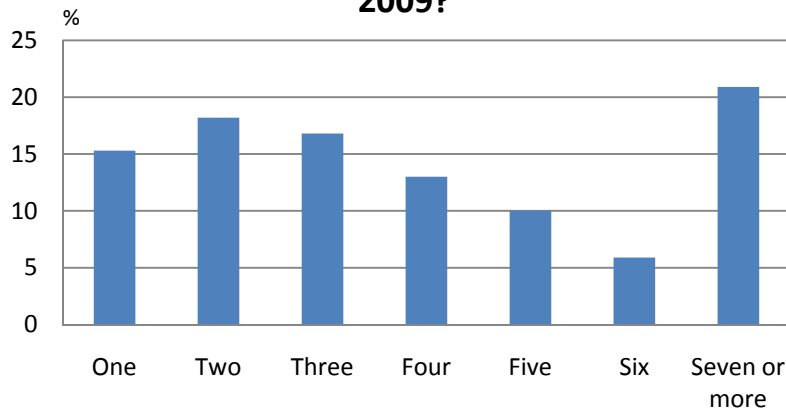
TRAVELS OF ICELANDERS 2009

Were trips undertaken in Iceland or overseas in 2009?



Just under half travelled only within Iceland. Two out of five travelled both within and outside Iceland and 4% travelled exclusively overseas. However, 8% did not travel at all. Thus, less than half of Icelanders travelled overseas, indicating a substantial decrease in overseas travel among Icelanders.

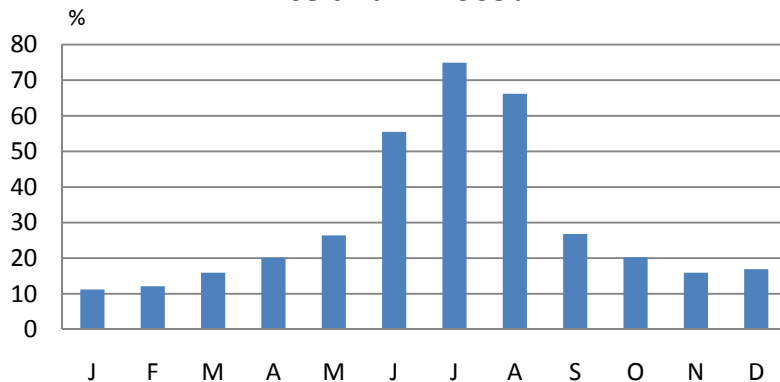
How many trips were taken in Iceland in 2009?



A third of Icelanders took one to two trips in Iceland in 2009, just under half took three to six trips and around a fifth took seven trips or more.

14

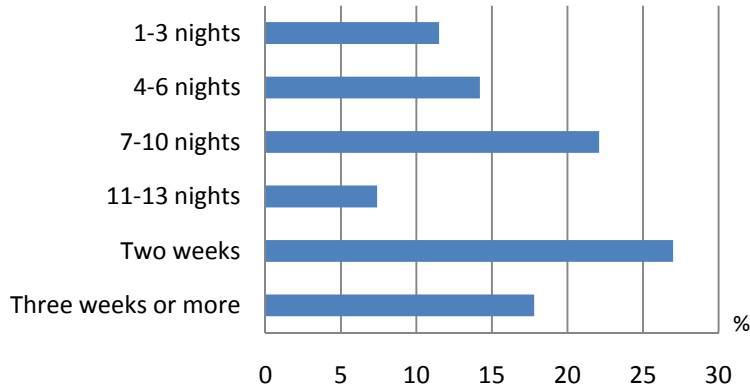
In which month were trips undertaken in Iceland in 2009?



There are seasonal changes as regards the domestic travels of Icelanders, with the majority travelling during summer.

TRAVELS OF ICELANDERS 2009

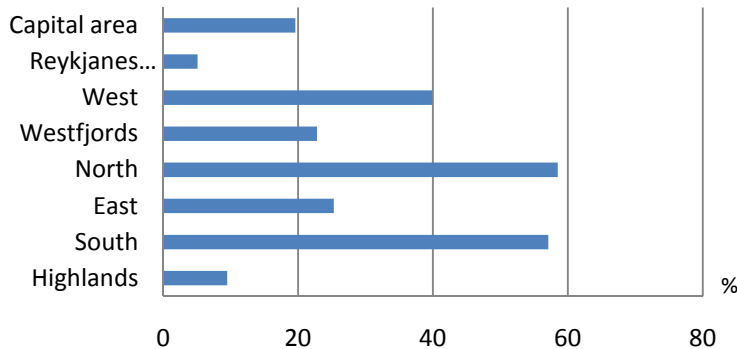
No. of overnight stays in Iceland in 2009



Icelanders spent an average of 14.3 nights during domestic travel in 2009.

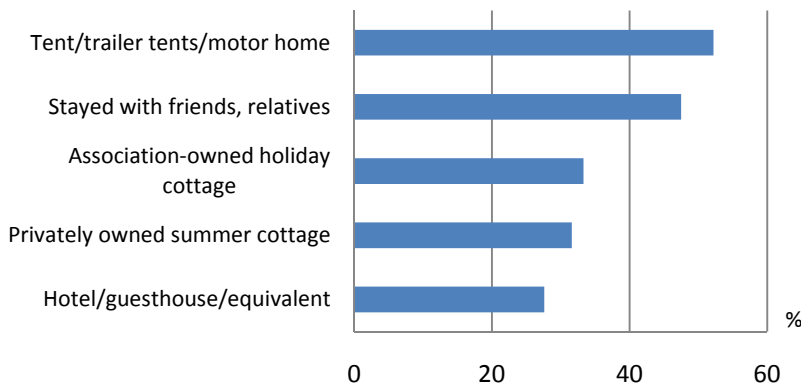
A quarter spent one to six nights, just under a quarter spent seven to ten nights and approximately half spent eleven nights or more.

In what part of the country were the overnight stays during travel in Iceland?



Northern and southern Iceland are the regions in which the majority stayed, three out of every five.

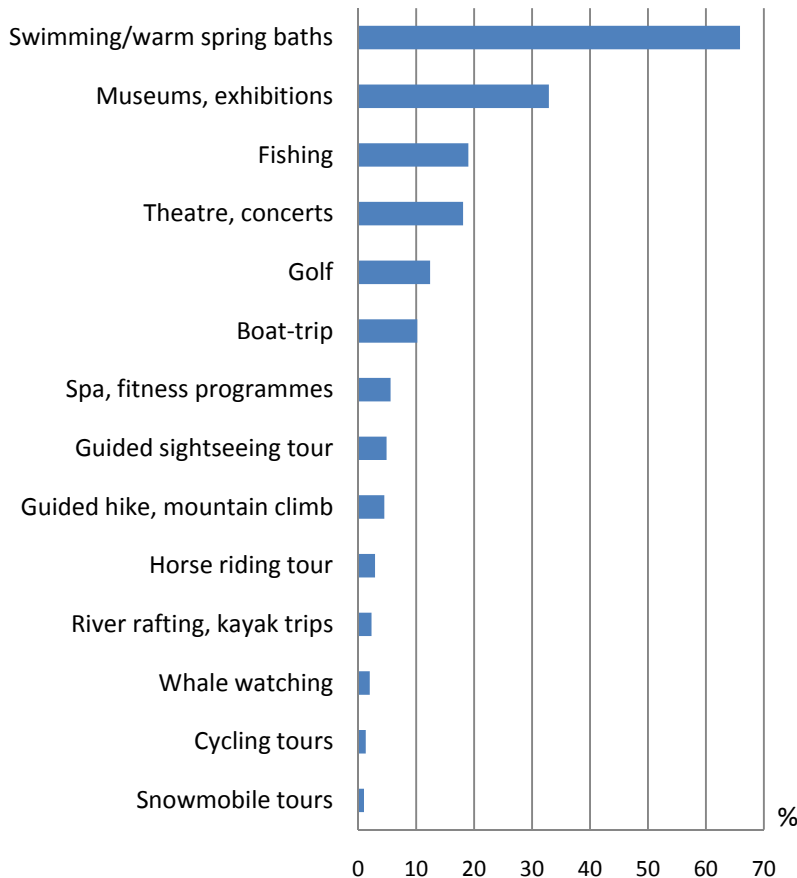
What accommodation options were used when travelling in Iceland in 2009?



The accommodation used by the majority of Icelanders included tents, trailer tents and motor homes. Moreover, a large number stayed with friends or relatives.

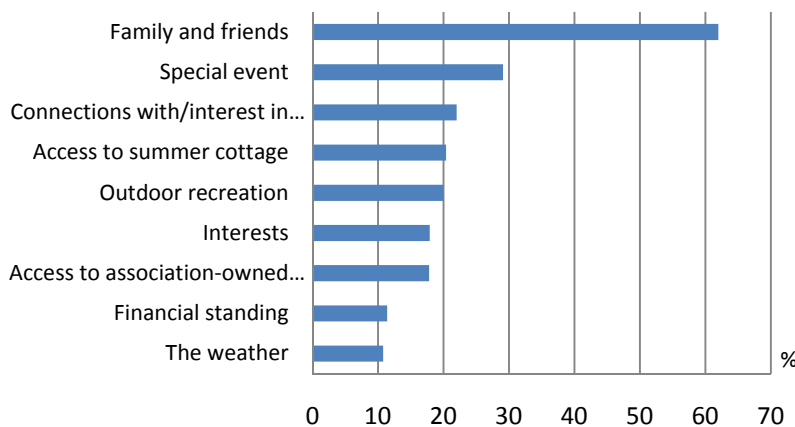
TRAVELS OF ICELANDERS 2009

What recreational activity was paid for during travel in Iceland 2009?



Swimming and bathing in warm springs are the recreational options that most Icelanders paid for during domestic trips. In addition, a large number paid entrance fees to museums and exhibitions and purchased fishing permits, theatre tickets and concert tickets. Nature-related recreational options were less popular.

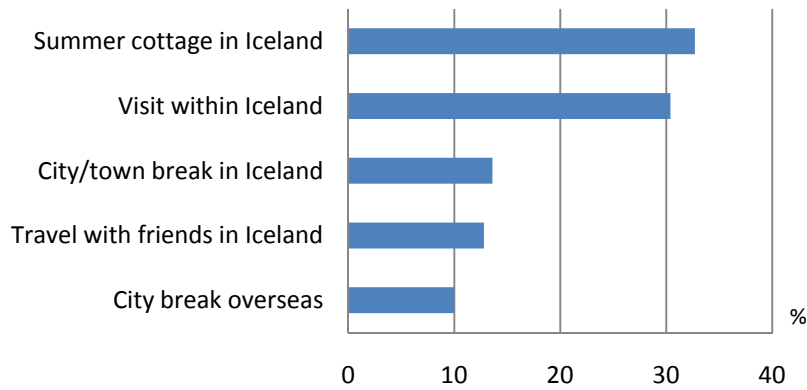
What influenced the decision to travel in 2009 the most?



A number of aspects influenced decision making as regards travel in 2009. Family and friends had the greatest influence, while other aspects taken into consideration included special events, interest in or connections to a place or area, access to summer cottages and outdoor recreation in general.

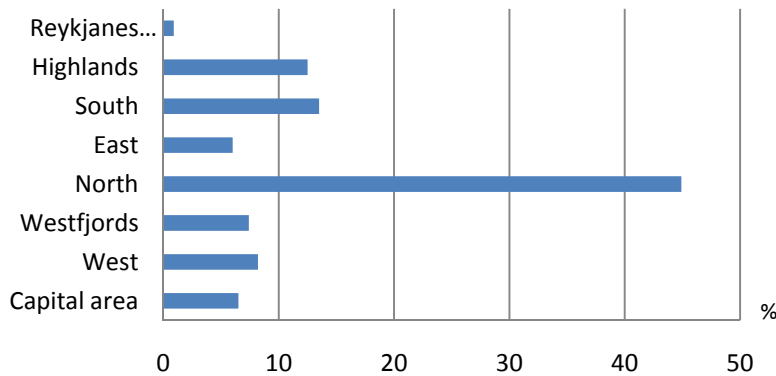
PLANNED TRAVELS OF ICELANDERS 2010

What type of travel are Icelanders going to undertake in the near future (Jan-May '10)?



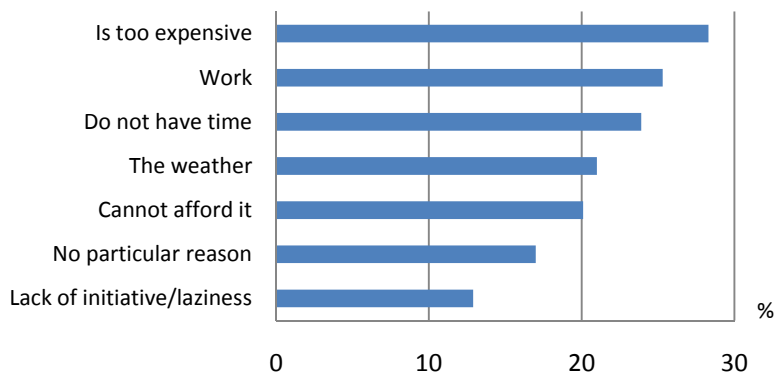
The majority of those planning trips in the early part of 2010 intend to travel within Iceland and either stay in a summer cottage or visit friends and acquaintances.

What area is most interesting for winter travel in Iceland?



Northern Iceland is the area that the majority of Icelanders find most interesting for winter travel.

What prevents more travel in Iceland during winter?



The major reason why Icelanders do not travel more in Iceland during winter is that they feel that it is too expensive, they are unable to do so due to work or they lack the time. The weather also has a negative effect on travel, as does the fact some cannot afford to travel.