

### Travel destination Iceland

Denmark, United Kingdom, Germany and France

January 2013





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#### **DENMARK**

- 5 How positive or negative are you towards Iceland as a travel destination?
- 6 How likely or unlikely are you to visit Iceland in the future?
- 7 Have you seen or heard anything about Iceland as a travel destination through advertising or media coverage during the last six months?
- 8 Would you consider travelling to Iceland during the months of September through April?

### **UNITED KINGDOM**

- 9 How positive or negative are you towards Iceland as a travel destination?
- 10 How likely or unlikely are you to visit Iceland in the future?
- 11 Have you seen or heard anything about Iceland as a travel destination through advertising or media coverage during the last six months?
- 12 Would you consider travelling to Iceland during the months of September through April?

#### **GERMANY**

- 13 How positive or negative are you towards Iceland as a travel destination?
- 14 How likely or unlikely are you to visit Iceland in the future?
- 15 Have you seen or heard anything about Iceland as a travel destination through advertising or media coverage during the last six months?
- 16 Would you consider travelling to Iceland during the months of September through April?

#### **FRANCE**

- 17 How positive or negative are you towards Iceland as a travel destination?
- 18 How likely or unlikely are you to visit Iceland in the future?
- 19 Have you seen or heard anything about Iceland as a travel destination through advertising or media coverage during the last six months?
- 20 Would you consider travelling to Iceland during the months of September through April?

### COMPARISON

- 21 How positive or negative are you towards Iceland as a travel destination?
- 22 How likely or unlikely are you to visit Iceland in the future?
- 23 Have you seen or heard anything about Iceland as a travel destination through advertising or media coverage during the last six months?
- 24 Would you consider travelling to Iceland during the months of September through April?



### Description

Client Íslandsstofa

Field work period Week 4 and 5, 2013 Methodology Online omnibus

### Sample

Denmark 18+ years of age
United Kingdom 18+ years of age
Germany 18+ years of age
France 18+ years of age

### **Number of respondents**

Denmark 1.007 United Kingdom 2.074 Germany 1.114 France 1.002

> Reykjavík February 7<sup>th</sup> 2013 MMR/Market and Media research ehf. Årmúla 32 108 Reykjavík http://www.mmr.is/



On average 54% of people surveyed in the UK, Germany, France and Denmark indicated they had positive views on Iceland as a travel destination. Looking at individual countries, just 38% of respondents in the UK said they had positive views on Iceland as a travel destination compared with 54% in Germany, 61% in France and 62% in Denmark.

Compared with averages from past surveys (from 2010 and 2012) one can see variable shifts in opinion towards lceland as a travel destination within different countries. The comparison reveals a 10% reduction in Danes responding positively on Iceland as a travel destination. Despite declining interest among Danes from 2010, latest survey (January 2013) indicates more positive attitude among Danes (62,3%) than in May 2010 (53,3%) and May 2012 (54,6%). The numbers for Germans and Brits looking favourably on Iceland as a travel destination is higher than the averge of the last three surveys, up by 3,5% for Danes and up 2,5% for Brits. After a declining interest among Brits (26%) and Germans (48%) in May 2010 (survey conducted one month after the Eyjafjallajökull eruption), which then was followed by an increasing interest amongst Germans in the August 2010 (60%). Comparison of last two surveys indicates a 3,7% decrease in Brits looking positively on Iceland as travel destination and no significant change among German participants. The number of French looking favourably on Iceland as travel destination slightly increases between the two surveys conducted in that country (58,2% in May 2012 and 60,7% in January 2013).

39% of the Danish respondents said they were likely to visit Iceland in the future - this is a 3,5% increase from the average of the past three surveys and 5% increase for last survey conducted in May 2012. Comparison of last two surveys also indicates 3% increase amongst German respondents and 4% increase amongst French respondents who said they were likely to visit Iceland in the future - for Germans this is 1,5% increase from the average of the past three surveys.

21% of the British respondents indicated they were likely to visit Iceland in the future – which is on par with last survey from May 2012 (21%) and the average from past surveys, excluding the survey conducted one month after the Eviafiallaiökull eruption (16%).

With the exception of Denmark, television continues to be the most common form of media where people come across advertising and media coverage on Iceland (10% in the UK, 24% in Germany and 23% in France). In Denmark the Internet was most frequently cited (by 20%) as the means by which people had seen or heard anything about Iceland as a travel destination during the last six months.

For the second time, the survey asked if people were interested to travel to Iceland during the months of September through April. In total, 39% of German respondents, 34% of British respondents, 30% of French respondents and 21% of Danish respondents stated they would consider travelling to Iceland during these months. Comparison of the two surveys indicates a 7% increase among French respondents, 5% increase among Danish respondents, 1% increase among Brits and 3% decrease among German respondents. Interestingly, interest in visiting Iceland during these months was significantly higher amongst the younger population of all the countries except France. Looking at under 35 year olds, the number of people that would consider a visit to Iceland during the months of September through April was 30% in Denmark, 52% in the UK and 47% in Germany. Comparison of the two surveys indicates a 5% increase among younger population of Danes and 6% increase among younger population of Brits.

### **DENMARK**

### How positive or negative are you towards Iceland as a travel destination?

Total

Age

Gender

Total

Male

Female

18-34 years

35-54 years



Very negative

0,5%

0,2%

0,8%

0,3%

0,3%

3,9%

3,9%

3,9%

6,6%

Count

972

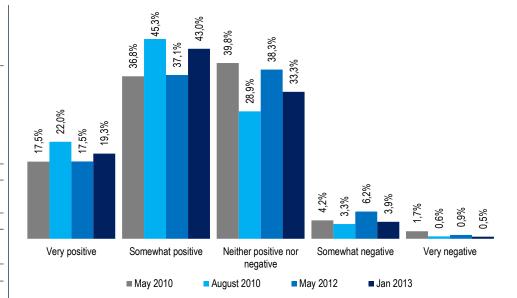
482

489

289

393

Answers	Count	Pct.%	Conf.lim +/-
Very positive	188	19,3%	2,5%
Somew hat positive	418	43,0%	3,1%
Neither positive nor negative	324	33,3%	3,0%
Somew hat negative	38	3,9%	1,2%
Very negative	5	0,5%	0,4%
Count	972	100,0%	
Answ ered	972	96,5%	
Did not answer	35	3,5%	
Count	1007	100,0%	
Asked*	1007	100,0%	
Not asked	0	0,0%	
Number of participants	1007	100,0%	



Very positive

19,3%

20,6%

18,0%

15,4%

20,3%

43,0%

42,2%

43,9%

45,8%

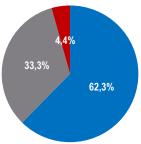
33,3%

33,1%

33,5%

31,8%

41,5% 35,7% 2,3%



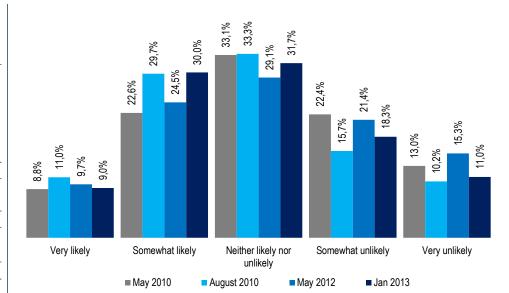
33,370			- ,	,		,	,	
62,3%		55 years plus	21,9%	42,3%	31,5%	3,3%	1,0%	289
02,570	Family situation	Before family (young or with no kids)	15,1%	47,5%	31,9%	5,5%	-	295
		Young family (kids 0-6 years)	19,1%	44,2%	33,3%	3,3%	-	120
		Adult family (kids 7 years + )	24,1%	43,7%	29,0%	2,1%	1,0%	193
		Post family (no kids at home)	20,4%	38,4%	37,6%	3,2%	0,4%	209
■ Very or somewhat positive		Retired	19,8%	38,7%	35,8%	4,3%	1,5%	132
•	Urban/rural	Capital city area	22,9%	44,2%	28,9%	3,6%	0,4%	245
■ Neither positive nor negative		Urban, more than 100.000 inhabitants	11,0%	53,6%	32,4%	2,9%	-	162
■ Very or somewhat negative		Urban, 50.000 - 100.000 inhabitants	18,4%	45,4%	29,6%	5,3%	1,3%	149
		Urban, 10.000 - 49.999 inhabitants	20,1%	38,4%	34,2%	6,1%	1,2%	164
		Rural, less than 10.000 inhabitants	21,9%	37,9%	38,3%	1,9%	-	158
		Rural	19,9%	34,8%	42,1%	3,1%	-	94
	Region	Capital city	22,0%	42,7%	30,8%	3,9%	0,7%	301
		Sjælland	22,8%	44,9%	29,5%	2,1%	0,7%	142
		Syddanmark	15,7%	42,5%	35,7%	5,7%	0,4%	208
		Midtjylland	18,3%	41,9%	35,2%	4,1%	0,5%	217
		Nordjylland	16,0%	45,0%	37,0%	1,9%	-	105
ked: Everyone.								

<sup>\*</sup>Asked: Everyone.

## DENMARK How likely or unlikely are you to visit Iceland in the future?



Answers	Count	Pct.%	Conf.lim +/-
Very likely	86	9,0%	1,8%
Somew hat likely	285	30,0%	2,9%
Neither likely nor unlikely	301	31,7%	3,0%
Somew hat unlikely	174	18,3%	2,5%
Very unlikely	105	11,0%	2,0%
Count	952	100,0%	
Answered	952	94,5%	
Did not answer	55	5,5%	
Count	1007	100,0%	
Asked*	1007	100,0%	
Not asked	0	0,0%	
Number of participants	1007	100,0%	



29,3%	39,0%
31,7%	

- Very or somewhat likely
- Neither likely nor unlikely
- Very or somewhat unlikely

		Very likely	Somewhat likely	Neither likely nor unlikely	Somewhat unlikely	Very unlikely	Count
Total	Total	9,0%	30,0%	31,7%	18,3%	11,0%	952
Gender	Male	7,8%	28,7%	30,7%	20,7%	12,1%	468
	Female	10,2%	31,2%	32,6%	16,0%	10,0%	484
Age	18-34 years	11,9%	37,8%	27,7%	15,5%	7,1%	282
	35-54 years	8,1%	28,6%	35,1%	17,7%	10,6%	379
	55 years plus	7,5%	24,1%	31,1%	21,8%	15,5%	292
Family situation	Before family (young or with no kids)	10,5%	35,7%	29,3%	15,0%	9,6%	292
	Young family (kids 0-6 years)	10,4%	36,7%	34,4%	15,0%	3,5%	114
	Adult family (kids 7 years + )	8,1%	27,6%	36,6%	19,5%	8,1%	182
	Post family (no kids at home)	9,1%	29,2%	29,6%	18,1%	14,0%	210
	Retired	5,1%	16,8%	31,7%	26,4%	20,2%	133
Urban/rural	Capital city area	14,4%	34,3%	30,2%	14,1%	7,1%	240
	Urban, more than 100.000 inhabitants	9,0%	31,1%	35,6%	15,8%	8,5%	158
	Urban, 50.000 - 100.000 inhabitants	8,5%	30,3%	31,5%	16,7%	13,0%	147
	Urban, 10.000 - 49.999 inhabitants	7,6%	30,4%	26,0%	21,5%	14,5%	161
	Rural, less than 10.000 inhabitants	5,1%	28,5%	35,6%	19,4%	11,3%	154
	Rural	5,3%	18,1%	32,0%	28,7%	15,9%	92
Region	Capital city	12,8%	32,4%	29,7%	17,1%	7,9%	291
	Sjælland	8,6%	31,5%	26,2%	17,2%	16,5%	142
	Syddanmark	6,7%	28,7%	32,0%	19,6%	13,0%	207
	Midtjylland	7,0%	31,5%	33,3%	18,4%	9,9%	211
	Nordjylland	7,8%	20,3%	40,6%	20,6%	10,7%	102

<sup>\*</sup>Asked: Everyone.

### **DENMARK**

### Have you seen or heard anything about Iceland as a travel destination through advertising or media coverage during the last six months?\*



2,7%

4,8%

7,4%

3,8%

61,8%

55,3%

58,4%

54,7%

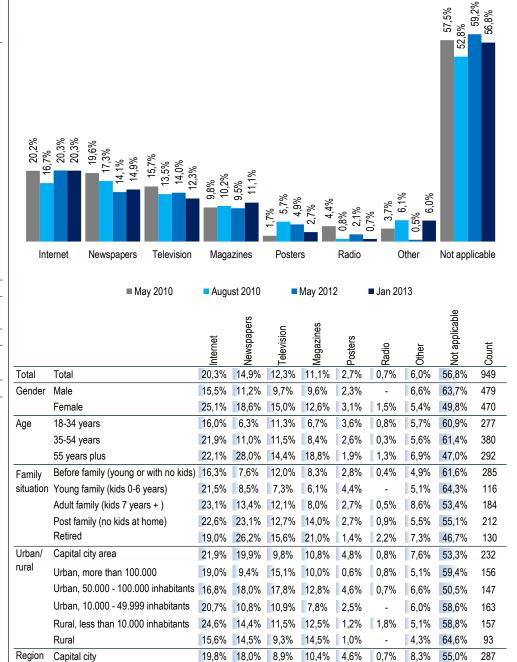
142

204

214

102

Answers	Count	Pct.%	Conf.lim +/-
Internet (e.g. web sites,			
blogs, social media etc.)	192	20,3%	2,6%
New spapers	141	14,9%	2,3%
Television	117	12,3%	2,1%
Magazines	105	11,1%	2,0%
Posters (i.e. outdoor media)	26	2,7%	1,0%
Radio	7	0,7%	0,5%
Other (please specify)	57	6,0%	1,5%
Not applicable - I hav e			
not noticed Iceland			
being advertised or	539	56,8%	3,2%
discussed as a travel			
destination			
Total	949		
Answ ered	949	94,2%	
Did not answer	58	5,8%	
Count	1007	100,0%	
Asked*	1007	100,0%	
Not asked	0	0,0%	
Number of participants	1007	100,0%	



17,6% 14,6%

20,9% 12,5%

18,9% 14,4%

15,1%

17,2%

10,7%

27,1% 12,1% 11,6% 13,4%

13,5%

9,3%

11,1% 2,3%

4,0%

0,9%

1,4%

1,1%

0.9%

In 2010 participants where asked about last three months.

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Sjælland

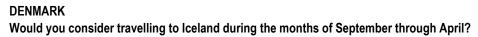
Syddanmark

Midtjylland

Nordjylland

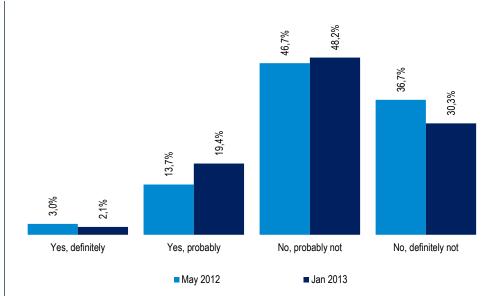
<sup>\*</sup>Asked: Everyone.

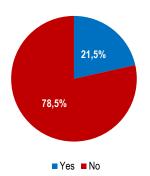
<sup>\*-</sup>please select all of the options below which describe where you have seen or heard about Iceland as a travel destination





Answers	Count	Pct.%	Conf.lim +/-
Yes, definitely	17	2,1%	1,0%
Yes, probably	152	19,4%	2,8%
No, probably not	378	48,2%	3,5%
No, definitely not	238	30,3%	3,2%
Count	785	100,0%	
Answered	785	77,9%	
Did not answer	222	22,1%	
Count	1007	100,0%	
Asked*	1007	100,0%	
Not asked	0	0,0%	
Number of participants	1007	100,0%	





		Yes, definitely	Yes, probably	No, probably not	No, definitely not	Count
Total	Total	2,1%	19,4%	48,2%	30,3%	785
Gender	Male	1,3%	16,3%	50,0%	32,4%	394
	Female	3,0%	22,4%	46,4%	28,2%	391
Age	18-34 years	2,7%	27,5%	40,3%	29,6%	223
	35-54 years	2,6%	19,3%	50,6%	27,5%	307
	55 years plus	1,1%	12,3%	52,2%	34,3%	255
Family situation	Before family (young or with no kids)	3,8%	25,4%	43,7%	27,0%	232
	Young family (kids 0-6 years)	1,1%	30,5%	44,3%	24,1%	87
	Adult family (kids 7 years + )	1,9%	16,1%	56,4%	25,5%	153
	Post family (no kids at home)	1,0%	15,7%	47,9%	35,3%	180
	Retired	1,7%	8,9%	50,0%	39,4%	118
Urban/rural	Capital city area	3,2%	25,3%	50,9%	20,7%	187
	Urban, more than 100.000 inhabitants	2,4%	18,9%	51,8%	26,9%	126
	Urban, 50.000 - 100.000 inhabitants	0,7%	24,7%	41,8%	32,8%	124
	Urban, 10.000 - 49.999 inhabitants	2,8%	17,1%	46,7%	33,4%	142
	Rural, less than 10.000 inhabitants	2,3%	15,1%	45,3%	37,3%	127
	Rural	-	8,8%	53,6%	37,6%	78
Region	Capital city	2,9%	22,5%	50,3%	24,2%	235
	Sjælland	4,2%	21,3%	42,7%	31,8%	117
	Syddanmark	1,1%	19,6%	46,5%	32,7%	167
	Midtjylland	1,1%	15,1%	52,5%	31,3%	177
	Nordjylland	1,1%	16,4%	44,6%	37,9%	89

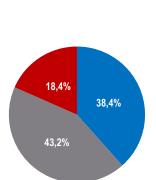
\*Asked: Everyone.

New question in May 2012





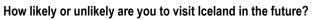
Answers	Count	Pct.%	Conf.lim +/-
Very positive	265	13,8%	1,5%
Somew hat positive	475	24,6%	1,9%
Neither positive nor negative	832	43,2%	2,2%
Somew hat negative	212	11,0%	1,4%
Very negative	143	7,4%	1,2%
Total	1927	100,0%	
Answered	1927	92,9%	
Did not answer	147	7,1%	
Count	2074	100,0%	
Asked*	2074	100,0%	
Not asked	0	0,0%	
Number of participants	2074	100,0%	



- Very or somewhat positive
- Neither positive nor negative
- Very or somewhat negative

%,1,2%	13,5%	18,6% 25,8% 28,6%	24,6	40,2%		43,5%	43,2%	19,9%	%9'6		11,0%	13,6%	%2'9	4,3%	7,4%
Very pos	sitive	Somewhat po	sitive	Neith	ner pos negati		nor	Son	newha	t nega	ative		Very ne	gativ	е
		■ May 2010	<b>=</b> /	August	2010		■ Ma	ay 201	2		Jan 20	13			
					Verv positive		Somewhat	positive	Neither positive	nor negative	Somewhat	negative	Very negative		Total
Total	Tota	l			13,8			6%	43,		11,0	)%	7,4%	6	1927
Gender	Male	)			10,7	7%		5%	42,	1%	12,3	3%	7,5%	6	936
	Fem				16,6			9%	44,		9,8		7,4%		991
Age	18-3				19,3			6%	35,		10,7		1,4%		557
	35-5	4			15,2			0%	46,		7,6		4,8%		676
Marital status	55+	ried/ Civil Partne			8,0		_	1%	46,		14,5		14,89		694
Maritai Status		g as married	Snip		12,1			7% 2%	44, 41,		12,3		9,4%		987 234
		arated/ Divorced			13,1			2 % 7%	47,		16,0		5,2%		176
		owed			5,9			4%	43,		11,4		23,5		65
		er Married			16,5			6%	39,		8,4		2,8%		466
Region	Nortl				14,1			6%	41,		11,8		11,19		453
	Midla	ands			10,0		24,	4%	46,	7%	12,3	3%	6,6%		308
	East				9,6	%	23,	4%	51,	4%	10,2	2%	5,5%	6	180
	Lond	don			15,9	9%	31,	1%	39,	1%	9,6	%	4,3%	6	239
	Sout	th			14,4	1%	26,	3%	41,	2%	11,2	2%	6,9%	6	438
	Wale	es			17,8	3%	22,	1%	37,	7%	5,4	%	16,9	%	91
	Scot				17,1	۱%	23,	9%	46,	9%	9,6	%	2,6%	6	162
	Nortl	hern Ireland			15,4	1%	20,	6%	43,	1%	16,8	3%	4,0%	6	57

<sup>\*</sup>Asked: Everyone.





Answers	Count	Pct.%	Conf.lim +/-
Very likely	119	6,0%	1,1%
Somew hat likely	290	14,7%	1,6%
Neither likely nor unlikely	466	23,7%	1,9%
Somew hat unlikely	356	18,1%	1,7%
Very unlikely	738	37,5%	2,1%
Total	1968	100,0%	
Answered	1968	94,9%	
Did not answer	106	5,1%	
Count	2074	100,0%	
Asked*	2074	100,0%	
Not asked	0	0,0%	
Number of participants	2074	100,0%	



■ Very or somewhat likely

55,6%

20,8%

23,7%

- Neither likely nor unlikely
- Very or somewhat unlikely

3,8% 5,1%	6.0% 11,7% 16,1% 17,1%	20,3%	23,0%	23,7%	17,6%	18,1%	38,1%	37,5%
Very like	sly Somewhat likely		ner likely no unlikely	or So	omewhat unlik	cely	Very unlikel	у
	■ May 2010 ■ Ai	ا اugust 2	•	■ May 20	)12           .	lan 2013		
			Very likely	Somewhat likely	Neither likely nor unlikely	Somewhat unlikely	Very unlikely	Total
Total	Total		6,0%	14,7%	23,7%	18,1%	37,5%	1968
Gender	Male		7,1%	14,8%	23,8%	18,8%	35,5%	955
A	Female		5,0%	14,6%	23,5%	17,4%	39,4%	1013
Age	18-34 35-54		13,0% 4,8%	25,1%	27,4%	19,9%	14,6%	556 696
	55+		1,8%	16,2% 5,2%	24,5% 20,0%	17,8% 16,9%	36,7% 56,1%	716
Marital status	Married/ Civil Partnership		4,4%	11,4%	21,7%	18,6%	43,8%	1015
	Living as married		9,2%	18,9%	28,9%	17,1%	25,9%	245
	Separated/ Divorced		3,5%	12,3%	23,2%	14,7%	46,3%	178
	Widowed		0,8%	4,0%	17,1%	15,0%	63,1%	66
	Never Married		9,6%	22,3%	26,2%	19,1%	22,8%	464
Region	North		6,2%	11,2%	21,9%	18,6%	42,1%	463
	Midlands		2,3%	11,8%	27,5%	17,5%	40,9%	316
	East		2,9%	11,8%	21,8%	23,9%	39,7%	184
	London		9,8%	22,2%	22,7%	14,5%	30,9%	239
	South		6,8%	17,5%	21,5%	18,8%	35,4%	440
	Wales		11,0%	9,0%	25,3%	17,5%	37,1%	95
	Scotland		5,9%	18,4%	26,8%	18,1%	30,8%	173

6,6%

14,2% 31,7% 8,5%

39,0%

57

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Northern Ireland

<sup>\*</sup>Asked: Everyone.

### Have you seen or heard anything about Iceland as a travel destination through advertising or media coverage during the last six months?\*



Count	Pct.%	Conf.lim +/-
199	10,1%	1,3%
162	8 2%	1,2%
102	0,270	1,2/0
135	6,9%	1,1%
122	6,2%	1,1%
45	2,3%	0,7%
21	1,0%	0,4%
75	3,8%	0,8%
1456	73,8%	1,9%
1972		
1972	95,1%	
102	4,9%	
2074	100,0%	
2074	100,0%	
0	0,0%	
2074	100,0%	
	199 162 135 122 45 21 75 1456 1972 1972 102 2074 2074 0	199 10,1% 162 8,2% 135 6,9% 122 6,2% 45 2,3% 21 1,0% 75 3,8%  1456 73,8%  1972 1972 95,1% 102 4,9% 2074 100,0% 2074 100,0% 0 0,0%

16,8% 10,3% 10,1%	9,2% 8,7% 8,2% 8,2% 7,9% 7,9% 7,9%		, S	5,5% Posters		Sagio 3.2% 7.5% 7.5% 7.0% 7.0% 7.0% 7.0% 7.0% 7.0% 7.0% 7.0	0	3,8% 3,8%	%2'89 89 Not appl	%8'£2' 3'8%
	■ May 2010	August	2010	■ M	ay 2012	•	■ Jan 201	13		
		Felevision	Internet	Newspapers	Magazines	Posters	Radio	Other	Not applicable	Total
Total	Total	10,1%	8,2%	6,9%	6,2%	2,3%	1,0%	3,8%	73,8%	1972
Gender	Male	13,1%	8,4%	7,6%	6,3%	3,2%	1,9%	2,9%	71,9%	949
	Female	7,3%	8,0%	6,2%	6,0%	1,4%	0,3%	4,6%	75,6%	1023
Age	18-34	9,0%	13,9%	4,3%	5,8%	5,2%	1,7%	4,8%	68,8%	573
	35-54	9,1%	8,0%	6,3%	5,4%	1,7%	1,5%	2,9%	76,9%	693
	55+	11,9%	3,8%	9,5%	7,3%	0,4%	0,1%	3,8%	74,8%	706
Marital status	Married/ Civil Partnershi	p 9,8%	6,1%	7,6%	6,8%	1,5%	0,6%	3,6%	74,0%	1002
	Living as married	10,3%	7,9%	5,1%	7,3%	4,1%	2,9%	4,6%	76,3%	254
	Separated/ Divorced	12,2%	8,8%	8,2%	4,2%	1,6%	1,5%	1,3%	70,9%	174
	Widowed	12,7%	4,7%	9,5%	2,6%	-	-	2,0%	78,1%	67
	Never Married	9,4%	13,2%	5,4%	5,5%	3,4%	0,9%	4,9%	72,6%	476
Region	North	10,6%	9,6%	6,2%	7,9%	1,4%	2,0%	2,9%	73,7%	466
	Midlands	7,5%	7,4%	4,4%	2,4%	0,2%	-	3,7%	80,5%	321
	East	12,5%	5,0%	4,8%	6,7%	2,2%	0,8%	5,7%	73,2%	183
	London	9,0%	9,6%	7,8%	4,9%	4,8%	0,7%	3,8%	72,5%	242
	South	10,0%	7,0%	8,5%	5,8%	2,7%	0,9%	4,4%	72,4%	441
	Wales	10,6%	6,3%	6,3%	9,2%	0,7%	1,1%	1,5%	77,2%	101
	114100	. 0,070								
	Scotland	7,6%	12,8%	6,0%	8,0%	2,8%	1,1%	4,6%	73,2%	162

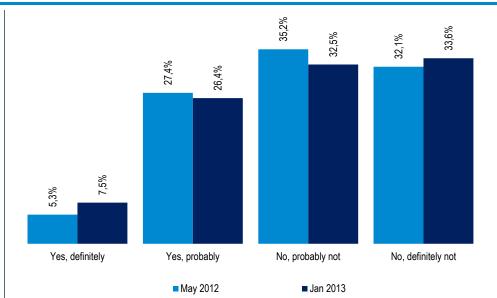
In 2010 participants where asked about last three months.

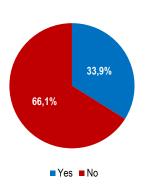
<sup>\*</sup>Asked: Everyone.
\*-please select all of the options below which describe where you have seen or heard about Iceland as a travel destination





Answers	Count	Pct.%	Conf.lim +/-
Yes, definitely	122	7,5%	1,3%
Yes, probably	432	26,4%	2,1%
No, probably not	531	32,5%	2,3%
No, definitely not	549	33,6%	2,3%
Total	1634	100,0%	
Answered	1634	78,8%	
Did not answer	440	21,2%	
Count	2074	100,0%	
Asked*	2074	100,0%	
Not asked	0	0,0%	
Number of participants	2074	100,0%	

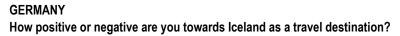




		Yes, definitely	Yes, probably	No, probably not	No, definitely not	Total
Total	Total	7,5%	26,4%	32,5%	33,6%	1634
Gender	Male	7,5%	25,7%	33,1%	33,7%	799
	Female	7,4%	27,1%	32,0%	33,6%	835
Age	18-34	13,3%	38,6%	32,1%	16,0%	449
	35-54	6,5%	28,5%	32,1%	32,9%	556
	55+	4,1%	15,9%	33,1%	46,9%	628
Marital status	Married/ Civil Partnership	6,1%	22,5%	34,3%	37,1%	851
	Living as married	8,1%	35,5%	30,7%	25,8%	205
	Separated/ Divorced	4,7%	22,9%	32,5%	39,9%	142
	Widowed	-	8,3%	32,3%	59,4%	59
	Never Married	12,5%	34,6%	29,4%	23,5%	376
Region	North	9,3%	21,2%	34,0%	35,5%	395
	Midlands	5,2%	23,0%	33,0%	38,7%	254
	East	5,0%	22,5%	41,6%	30,9%	141
	London	6,2%	35,2%	28,9%	29,7%	203
	South	7,7%	29,4%	30,3%	32,6%	367
	Wales	10,9%	22,7%	22,1%	44,3%	85
	Scotland	4,9%	34,1%	34,5%	26,5%	142
	Northern Ireland	16,5%	23,1%	35,8%	24,6%	47

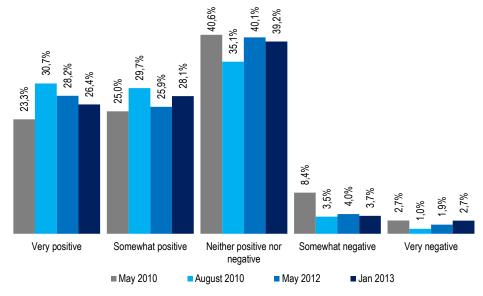
\*Asked: Everyone.

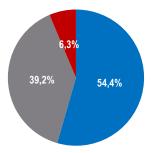
New question in May 2012





Answers	Count	Pct.%	Conf.lim +/-
Very positive	272	26,4%	2,7%
Somew hat positive	290	28,1%	2,7%
Neither positive nor negative	404	39,2%	3,0%
Somew hat negative	38	3,7%	1,1%
Very negative	28	2,7%	1,0%
Total	1031	100,0%	
Answered	1031	92,6%	
Did not answer	83	7,4%	
Count	1114	100,0%	
Asked*	1114	100,0%	
Not asked	0	0,0%	
Number of participants	1114	100,0%	

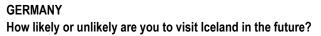




- Very or somewhat positive
- Neither positive nor negative
- Very or somewhat negative

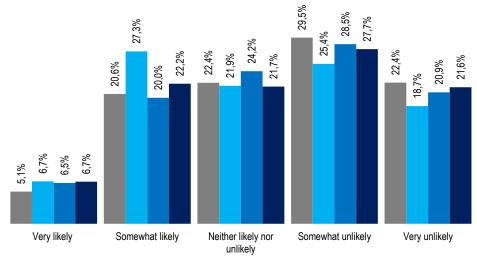
negative							
	■ May 2010 ■ August	2010	■ May 2012	2 =	Jan 2013		
		Very positive	Somewhat positive	Neither positive nor negative	Somewhat negative	Very negative	Total
Total	Total	26,4%	28,1%	39,2%	3,7%	2,7%	1031
Gender	Male	22,8%	33,7%	37,7%	2,9%	3,0%	500
	Female	29,8%	22,8%	40,6%	4,4%	2,4%	531
Age grouped	18-24 years	20,7%	28,5%	44,8%	6,0%	-	101
	25-34 years	31,6%	35,9%	25,3%	3,0%	4,2%	149
	35-44 years	33,2%	30,0%	33,3%	2,5%	1,1%	186
	45-54 years	23,3%	30,0%	40,7%	1,3%	4,7%	185
	55 years plus	24,1%	23,4%	44,9%	5,0%	2,6%	411
Life cycle	Single	30,5%	33,6%	30,6%	2,7%	2,7%	229
	Married	24,4%	28,7%	40,5%	4,2%	2,2%	480
	Partnership after the life partnership law	40,9%	35,5%	23,6%	-	-	16
	With Partner/in living together	26,6%	26,4%	42,8%	2,4%	1,7%	139
	Separated living	17,1%	15,9%	46,5%	7,5%	13,0%	23
	Divorced	29,2%	20,7%	44,1%	3,7%	2,3%	107
	Widowed	17,6%	18,8%	47,5%	9,2%	7,0%	28
Region	Schleswig-Holstein	28,4%	26,3%	45,3%	-	-	37
	Hamburg	20,8%	20,9%	48,1%	7,7%	2,5%	23
	Niedersachsen	29,9%	31,9%	36,6%	1,7%	-	101
	Bremen	21,2%	57,3%	14,1%	7,4%	-	8
	Nordrhein-Westfalen	27,9%	24,6%	40,3%	2,9%	4,3%	213
	Hessen	29,0%	24,4%	39,5%	3,4%	3,6%	77
	Rheinland-Pfalz	18,5%	44,4%	35,1%	2,0%	-	53
	Baden-Württemberg	21,1%	32,4%	39,0%	4,5%	2,9%	134
	Bayern	29,5%	27,3%	39,5%	2,5%	1,2%	157
	Saarland	12,4%	-	61,7%	25,9%	-	14
	Berlin	23,7%	20,8%	46,3%	6,8%	2,4%	43
	Brandenburg	29,1%	33,3%	26,6%	2,5%	8,4%	34
	Mecklenburg-Vorpommern	38,8%	28,4%	32,8%	-	-	22
	Sachsen	30,2%	26,5%	38,9%	4,4%	-	59
	Sachsen-Anhalt	15,5%	30,3%	43,5%	8,7%	2,1%	31
	Thüringen	22,8%	21,5%	32,8%	5,3%	17,5%	26

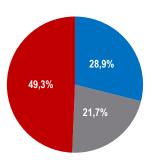
<sup>\*</sup>Asked: Everyone.





Answers	Count	Pct.%	Conf.lim +/-
Very likely	71	6,7%	1,5%
Somew hat likely	234	22,2%	2,5%
Neither likely nor unlikely	229	21,7%	2,5%
Somew hat unlikely	292	27,7%	2,7%
Very unlikely	228	21,6%	2,5%
Total	1054	100,0%	
Answered	1054	94,6%	
Did not answer	60	5,4%	
Count	1114	100,0%	
Asked*	1114	100,0%	
Not asked	0	0,0%	
Number of participants	1114	100,0%	





- Very or somewhat likely
- Neither likely nor unlikely
- Very or somewhat unlikely

5					ı				
Very I	likely	Somewhat likely	Neit	her likely r unlikely	nor So	omewhat unli	kely	Very unlike	ly
		■ May 2010	August 2	2010	■ May 20	)12	Jan 2013		
				Very likely	Somewhat likely	Neither likely nor unlikely	Somewhat unlikely	Very unlikely	Total
Total	Total			6,7%	22,2%	21,7%	27,7%	21,6%	1054
Gender	Male			6,4%	21,9%	23,6%	27,6%	20,4%	518
	Female			7,0%	22,5%	20,0%	27,7%	22,8%	537
Age grouped	18-24 ye			8,4%	21,5%	24,1%	32,4%	13,6%	104
	25-34 ye			12,0%	32,1%	30,2%	16,3%	9,5%	146
	35-44 ye			7,6%	27,6%	25,7%	24,0%	15,1%	189
	45-54 ye			6,2%	20,7%	19,6%	23,7%	29,8%	195
	55 years	plus		4,3%	17,3%	17,5%	34,0%	27,0%	420
Life cycle	Single			7,7%	24,3%	24,1%	28,4%	15,6%	232
	Married			6,1%	20,8%	22,6%	27,5%	23,0%	488
		hip after the life partne	ership law		42,7%	18,1%	13,8%	5,8%	16
		tner/in living together		6,8%	30,4%	20,9%	27,0%	14,9%	140
	Separate	· ·		12,5%	8,5%	30,1%	16,9%	32,0%	24
	Divorced			4,9%	17,0%	15,9%	31,0%	31,2%	115
	Widowed			5,9%	14,0%	12,1%	25,7%	42,3%	31
Region		ig-Holstein		9,9%	21,6%	21,6%	33,3%	13,7%	35
	Hamburg	•		2,8%	28,6%	18,7%	28,2%	21,7%	23
	Niedersa	ichsen		5,8%	25,1%	11,8%	30,0%	27,3%	103
	Bremen			6,9%	42,5%	36,0%	7,2%	7,4%	8
	Nordrhei	n-Westfalen		6,3%	18,9%	20,4%	31,4%	23,0%	224
	Hessen			7,4%	19,5%	25,8%	22,6%	24,7%	77
	Rheinlan	d-Pfalz		5,3%	29,0%	25,4%	20,4%	19,8%	54
		/ürttemberg		8,0%	20,1%	25,5%	26,0%	20,4%	141
	Bayern			6,5%	22,0%	27,6%	24,1%	19,8%	157
	Saarland	I		12,4%	13,6%	11,9%	37,8%	24,3%	14
	Berlin			10,8%	23,7%	8,7%	41,4%	15,4%	46
	Branden	ŭ		7,8%	30,4%	11,0%	23,6%	27,2%	34
		burg-Vorpommern		3,6%	32,0%	21,7%	28,6%	14,2%	22
	Sachsen			2,2%	24,4%	34,9%	23,9%	14,7%	57
	Sachsen	-Anhalt		4,4%	19,8%	25,9%	26,1%		31
	Thüringe	n		10,6%	16,2%	5,2%	30,9%	37,0%	27

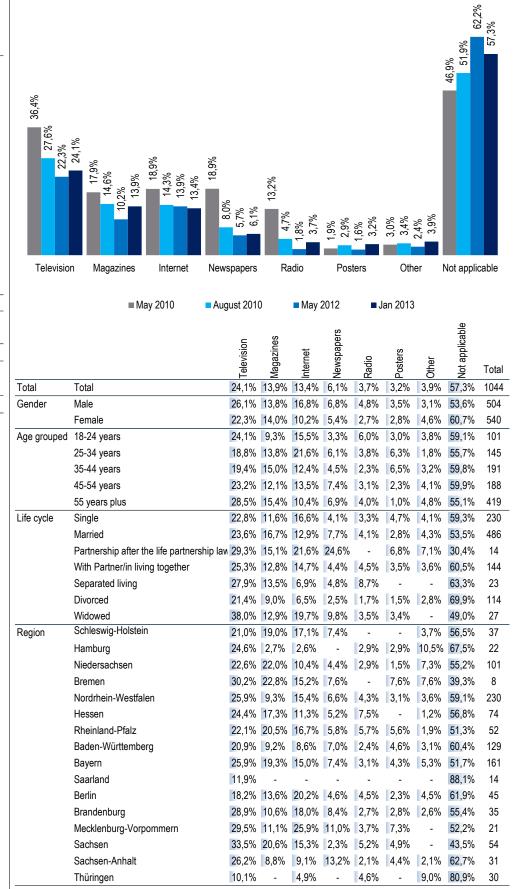
<sup>\*</sup>Asked: Everyone.

### GERMANY Have you seen or heard anything about Iceland as a travel destination through advertising or media coverage



Answers	Count	Pct.%	Conf.lim +,
Television	252	24,1%	2,6%
Magazines	145	13,9%	2,1%
Internet (e.g. web sites,			
blogs, social media	140	13,4%	2,1%
etc.)			
New spapers	63	6,1%	1,4%
Radio	39	3,7%	1,1%
Posters (i.e. outdoor media)	33	3,2%	1,1%
Other	41	3,9%	1,2%
Not applicable - I have not noticed Iceland being advertised or discussed as a travel destination	598	57,3%	3,0%
Count	1044		
Answered	1044	93,7%	
Did not answer	70	6,3%	
Count	1114	100,0%	
Asked*	1114	100,0%	
Not asked	0	0,0%	
Number of participants	1114	100,0%	

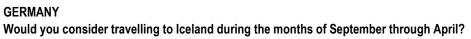
during the last six months?\*



In 2010 participants where asked about last three months.

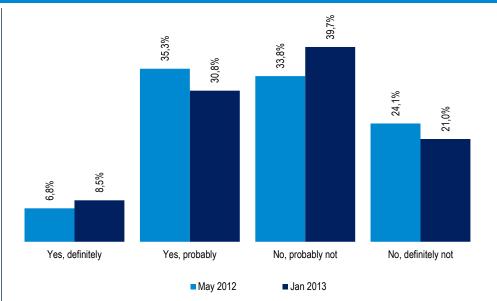
<sup>\*</sup>Asked: Everyone.

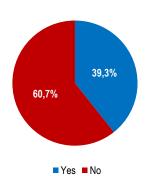
<sup>\*-</sup>please select all of the options below which describe where you have seen or heard about Iceland as a travel destination





Answers	Count	Pct.%	Conf.lim +/-
Yes, definitely	84	8,5%	1,7%
Yes, probably	307	30,8%	2,9%
No, probably not	396	39,7%	3,0%
No, definitely not	209	21,0%	2,5%
Total	995	100,0%	
Answered	995	89,4%	
Did not answer	119	10,6%	
Count	1114	100,0%	
Asked*	1114	100,0%	
Not asked	0	0,0%	
Number of participants	1114	100,0%	

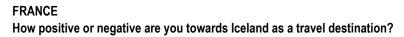




		Yes, definitely	Yes, probably	No, probably not	No, definitely not	Total
Total	Total	8,5%	30,8%	39,7%	21,0%	995
Gender	Male	7,9%	30,8%	40,5%	20,8%	490
	Female	9,1%	30,8%	39,0%	21,1%	505
Age grouped	18-24 years	7,2%	35,8%	37,6%	19,4%	99
	25-34 years	12,5%	38,3%	39,1%	10,1%	134
	35-44 years	9,9%	40,1%	35,3%	14,6%	175
	45-54 years	10,6%	32,1%	34,0%	23,3%	191
	55 years plus	5,8%	22,4%	45,1%	26,7%	397
Life cycle	Single	10,7%	34,9%	38,7%	15,7%	215
	Married	7,7%	26,6%	41,6%	24,0%	466
	Partnership after the life partnership law	15,4%	55,5%	12,1%	16,9%	16
	With Partner/in living together	6,0%	44,5%	36,4%	13,1%	136
	Separated living	7,3%	42,0%	25,0%	25,7%	22
	Divorced	11,8%	19,5%	44,0%	24,7%	105
	Widowed	2,6%	27,4%	36,2%	33,8%	28
Region	Schleswig-Holstein	10,1%	35,0%	36,6%	18,2%	34
	Hamburg	5,9%	40,9%	22,3%	31,0%	21
	Niedersachsen	10,8%	25,5%	50,8%	12,9%	97
	Bremen	19,9%	33,1%	39,8%	7,2%	9
	Nordrhein-Westfalen	8,0%	27,3%	40,4%	24,4%	218
	Hessen	8,3%	31,9%	33,4%	26,3%	70
	Rheinland-Pfalz	9,4%	39,4%	25,7%	25,5%	50
	Baden-Württemberg	4,7%	32,4%	40,2%	22,7%	130
	Bayern	10,6%	30,8%	44,0%	14,7%	143
	Saarland	16,3%	33,7%	50,0%	-	10
	Berlin	9,5%	30,7%	45,5%	14,3%	42
	Brandenburg	10,6%	32,9%	29,4%	27,1%	34
	Mecklenburg-Vorpommern	11,7%	29,1%	44,7%	14,5%	21
	Sachsen	6,7%	30,9%	43,4%	19,0%	58
	Sachsen-Anhalt	9,4%	26,4%	40,4%	23,8%	28
	Thüringen	-	39,9%	19,8%	40,3%	29

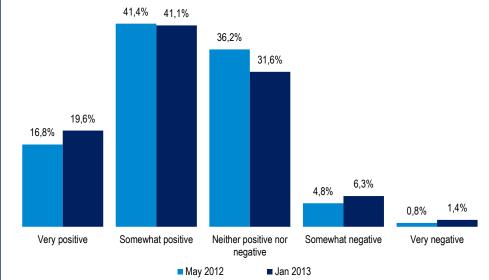
New question in May 2012

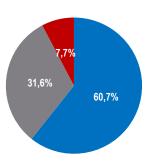
<sup>\*</sup>Asked: Everyone.





Answers	Count	Pct.%	Conf.lim +/-
Very positive	185	19,6%	2,5%
Somew hat positive	388	41,1%	3,1%
Neither positive nor negative	298	31,6%	3,0%
Somew hat negative	59	6,3%	1,5%
Very negative	13	1,4%	0,8%
Total	944	100,0%	
Answered	944	94,2%	
Did not answer	58	5,8%	
Count	1002	100,0%	
Asked*	1002	100,0%	
Not asked	0	0,0%	
Number of participants	1002	100,0%	

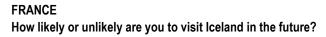




- Very or somewhat positive
- Neither positive nor negative
- Very or somewhat negative

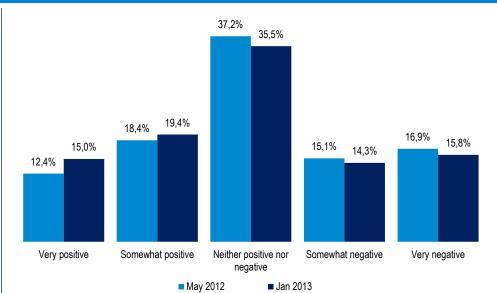
		Very positive	Somewhat positive	Neither positive nor negative	Somewhat negative	Very negative	Total
Total	Total	19,6%	41,1%	31,6%	6,3%	1,4%	944
Gender	Male	21,3%	41,8%	29,8%	5,7%	1,4%	461
	Female	18,0%	40,4%	33,3%	6,8%	1,5%	482
Age	18-34 years	18,5%	41,4%	31,8%	6,4%	2,0%	271
	35-54 years	23,9%	38,1%	31,5%	5,8%	0,7%	339
	55 years plus	16,2%	43,9%	31,6%	6,7%	1,6%	334
Marital status	Married	18,3%	39,3%	34,9%	6,2%	1,3%	393
	Re-married	18,4%	29,6%	33,4%	11,7%	6,9%	27
	Living together, not married	21,7%	41,3%	31,8%	4,7%	0,5%	193
	Living alone, but in a relationship	22,7%	43,6%	27,5%	5,1%	1,1%	105
	Living alone, but did live with someone	25,2%	45,2%	19,8%	6,9%	2,9%	75
	Divorced	16,4%	44,8%	29,9%	6,5%	2,4%	91
	Separated	5,9%	43,4%	35,4%	15,3%	-	27
	Widower/widow	22,5%	49,1%	24,3%	4,1%	-	22
Type of city	Village or rural environment	18,3%	41,5%	33,2%	5,0%	1,9%	265
	Small city or medium sized town	18,0%	42,1%	31,2%	7,3%	1,4%	418
	Big city	23,7%	38,9%	30,6%	6,0%	0,9%	258
Region	Northeast	15,9%	39,3%	35,8%	6,5%	2,5%	218
	Northwest	17,9%	41,7%	32,4%	7,1%	0,9%	223
	Paris region	23,0%	42,8%	29,5%	4,0%	0,6%	176
	Souteast	22,5%	38,9%	27,9%	8,8%	2,0%	233
	Soutwest	18.8%	45,9%	33,4%	2.0%	-	94

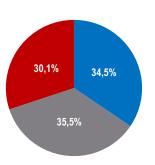
<sup>\*</sup>Asked: Everyone.





Answers	Count	Pct.%	Conf.lim +/-
Very likely	140	15,0%	2,3%
Somew hat likely	182	19,4%	2,5%
Neither likely nor unlikely	331	35,5%	3,1%
Somew hat unlikely	134	14,3%	2,2%
Very unlikely	147	15,8%	2,3%
Total	934	100,0%	
Answ ered	934	93,2%	
Did not answer	68	6,8%	
Count	1002	100,0%	
Asked*	1002	100,0%	
Not asked	0	0,0%	
Number of participants	1002	100,0%	





■ Very or somewhat likely

■ Neither likely nor unlikely

■ Very or somewhat unlikely

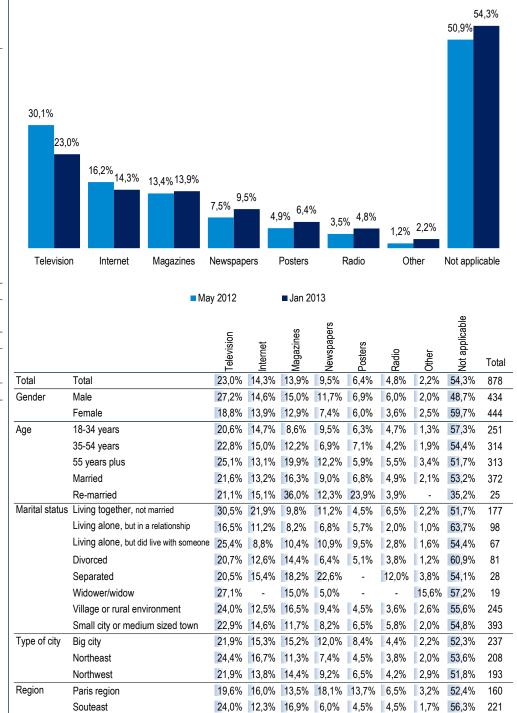
		Very likely	Somewhat likely	Neither likely nor unlikely	Somewhat unlikely	Very unlikely	Total
Total	Total	15,0%	19,4%	35,5%	14,3%	15,8%	934
Gender	Male	15,9%	18,7%	36,3%	15,9%	13,2%	461
	Female	14,2%	20,1%	34,6%	12,8%	18,3%	473
Age	18-34 years	17,8%	22,2%	30,4%	14,7%	14,9%	264
	35-54 years	18,0%	20,0%	36,0%	11,6%	14,5%	333
	55 years plus	9,9%	16,8%	38,9%	16,6%	17,7%	337
Marital status	Married	11,5%	20,2%	36,1%	14,8%	17,4%	397
	Re-married	22,8%	19,1%	19,1%	19,4%	19,5%	26
	Living together, not married	21,5%	17,9%	33,1%	14,8%	12,8%	187
	Living alone, but in a relationship	18,2%	26,9%	34,0%	8,6%	12,2%	105
	Living alone, but did live with someone	14,8%	16,3%	38,7%	12,6%	17,7%	75
	Divorced	14,3%	18,8%	39,2%	15,9%	11,7%	86
	Separated	8,3%	15,0%	36,3%	16,3%	24,1%	27
	Widower/widow	18,6%	11,0%	34,8%	14,6%	21,1%	21
Type of city	Village or rural environment	10,0%	22,9%	35,4%	17,5%	14,2%	263
	Small city or medium sized town	16,3%	18,7%	34,2%	12,8%	18,1%	412
	Big city	18,1%	17,2%	37,4%	13,5%	13,7%	258
Region	Northeast	12,2%	22,0%	34,3%	16,1%	15,4%	219
	Northwest	12,2%	20,8%	39,8%	12,9%	14,3%	216
	Paris region	23,0%	16,3%	34,6%	13,3%	12,8%	177
	Souteast	16,4%	15,7%	32,9%	16,7%	18,3%	229
	Soutwest	9,7%	25,2%	36,1%	9,5%	19,4%	94

<sup>\*</sup>Asked: Everyone.

# FRANCE Have you seen or heard anything about Iceland as a travel destination through advertising or media coverage during the last six months?\*



Answers	Count	Pct.%	Conf.lim +/-
Television	202	23,0%	2,8%
Internet (e.g. web sites,			
blogs, social media	125	14,3%	2,3%
etc.)			
Magazines	122	13,9%	2,3%
New spapers	84	9,5%	1,9%
Posters (i.e. outdoor	57	6 1%	1.6%
media)	51	0,470	1,070
Radio	42	4,8%	1,4%
Other	20	2,2%	1,0%
Not applicable - I hav e			
not noticed Iceland			
being advertised or	476	54,3%	3,3%
discussed as a travel			
destination			
Total	878		
Answ ered	878	87,6%	
Did not answer	124	12,4%	
Count	1002	100,0%	
Asked*	1002	100,0%	
Not asked	0	0,0%	
Number of participants	1002	100,0%	



25,2% 11,5% 12,5%

8,9%

3,1%

6,2%

1,1%

95

Market and Media Research Ltd.

Soutwest

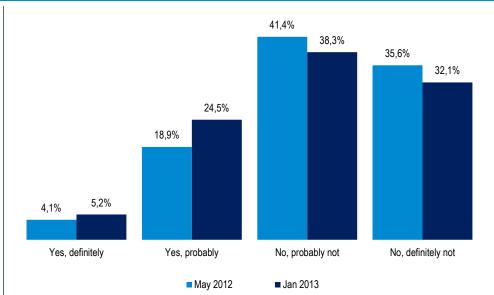
<sup>\*</sup>Asked: Everyone.

<sup>\*-</sup>please select all of the options below which describe where you have seen or heard about Iceland as a travel destination





Answers	Count	Pct.%	Conf.lim +/-
Yes, definitely	44	5,2%	1,5%
Yes, probably	208	24,5%	2,9%
No, probably not	325	38,3%	3,3%
No, definitely not	272	32,1%	3,1%
Total	848	100,0%	
Answered	848	84,7%	
Did not answer	154	15,3%	
Count	1002	100,0%	
Asked*	1002	100,0%	
Not asked	0	0,0%	
Number of participants	1002	100,0%	

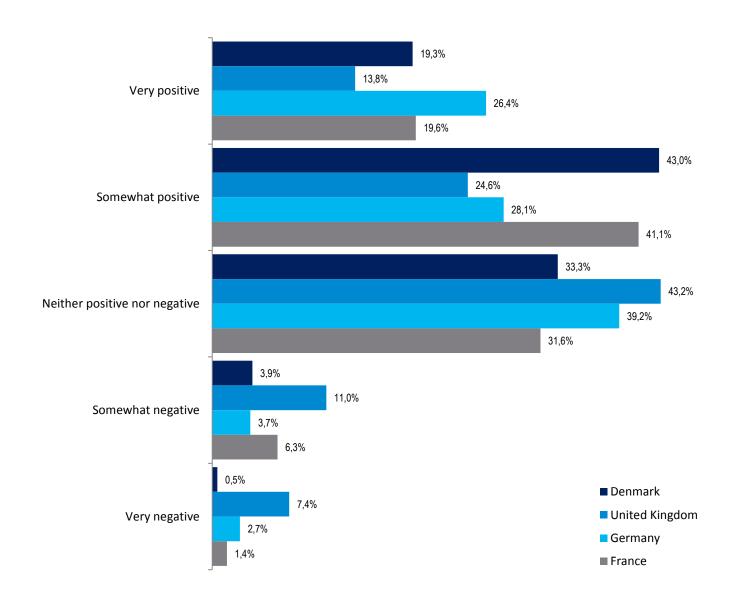


	29,6%
70,4%	
■ Vac	■ No

		Yes,	Yes,	No, probably	No, definitely	
		definitely	probably	not	not	Total
Total	Total	5,2%	24,5%	38,3%	32,1%	848
Gender	Male	4,5%	27,7%	39,5%	28,3%	413
	Female	5,8%	21,5%	37,1%	35,7%	435
Age	18-34 years	6,0%	24,9%	31,0%	38,1%	245
	35-54 years	5,8%	25,3%	38,5%	30,5%	299
	55 years plus	3,9%	23,4%	43,9%	28,8%	305
Marital status	Married	4,7%	24,6%	41,9%	28,8%	354
	Re-married	10,5%	17,8%	39,3%	32,3%	28
	Living together, not married	4,4%	29,0%	32,4%	34,2%	173
	Living alone, but in a relationship	6,3%	23,0%	34,6%	36,0%	100
	Living alone, but did live with someone	9,0%	18,3%	36,4%	36,4%	65
	Divorced	3,1%	22,8%	41,7%	32,5%	75
	Separated	-	21,3%	33,5%	45,2%	24
	Widower/widow	10,0%	30,2%	40,0%	19,9%	21
Type of city	Village or rural environment	3,8%	19,6%	42,8%	33,8%	237
	Small city or medium sized town	3,5%	26,2%	36,5%	33,8%	377
	Big city	9,4%	26,6%	37,0%	27,0%	231
Region	Northeast	3,0%	26,4%	36,7%	33,9%	203
	Northwest	7,2%	22,0%	38,8%	32,0%	185
	Paris region	4,7%	29,4%	37,6%	28,3%	159
	Souteast	6,9%	21,9%	39,2%	32,1%	217
	Soutwest	2,2%	23,0%	39,9%	34,9%	84

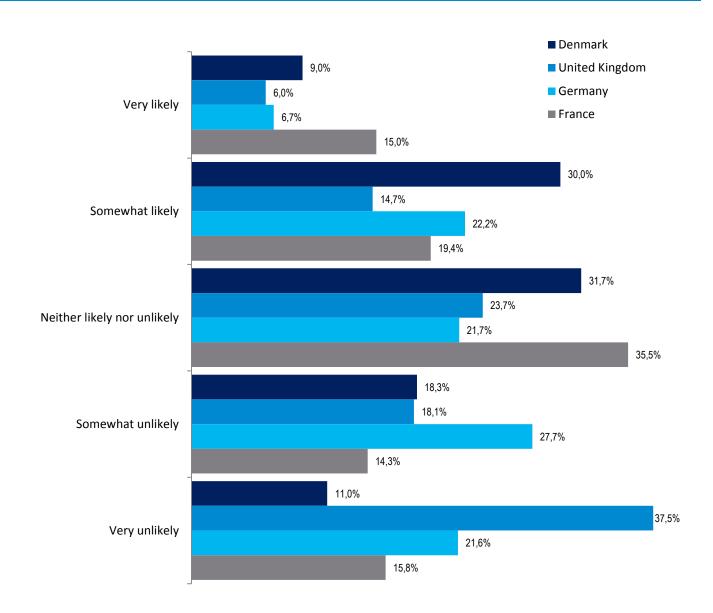
<sup>\*</sup>Asked: Everyone.



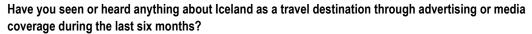


Neither positive nor						
	Positive	negative	Negative	Count		
Denmark	62,3%	33,3%	4,4%	972		
United Kingdom	38,4%	43,2%	18,4%	1927		
Germany	54,4%	39,2%	6,3%	1031		
France	60,7%	31,6%	7,7%	944		

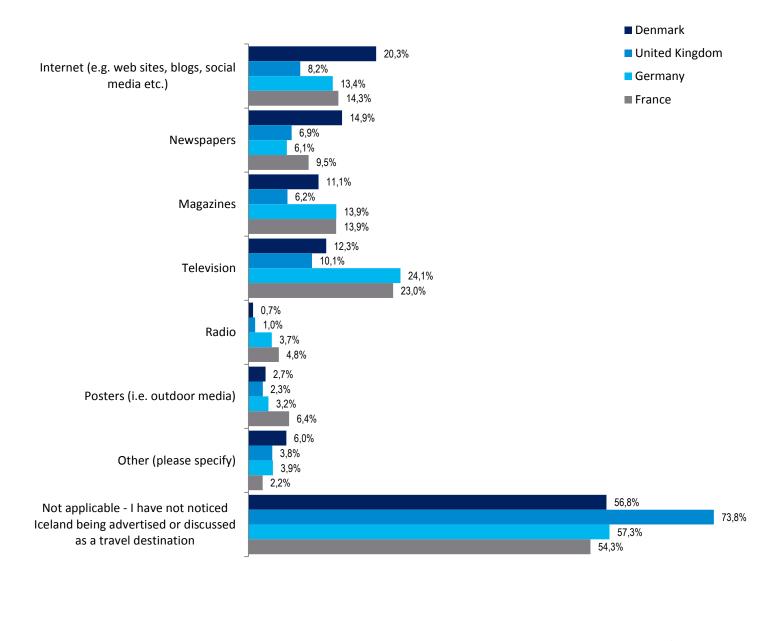




Neither likely nor						
	Likely	unlikely	Unlikely	Count		
Denmark	39,0%	31,7%	29,3%	952		
United Kingdom	20,8%	23,7%	55,6%	1968		
Germany	28,9%	21,7%	49,3%	1054		
France	34,5%	35,5%	30,1%	934		

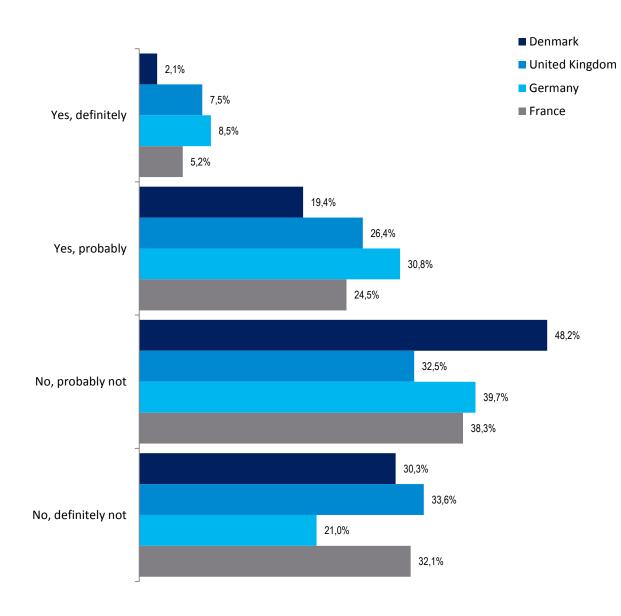






	Internet (e.g. web sites, blogs, social media etc.)	Newspapers	Magazines	Television	Radio	Posters (i.e. outdoor media)	Other (please specify)	Not applicable - I have not noticed Iceland being advertised or discussed as a travel destination	Count
Denmark	20,3%	14,9%	11,1%	12,3%	0,7%	2,7%	6,0%	56,8%	949
United Kingdom	8,2%	6,9%	6,2%	10,1%	1,0%	2,3%	3,8%	73,8%	1972
Germany	13,4%	6,1%	13,9%	24,1%	3,7%	3,2%	3,9%	57,3%	1044
France	14,3%	9,5%	13,9%	23,0%	4,8%	6,4%	2,2%	54,3%	878





	Yes	No	Count
Denmark	21,5%	78,5%	785
United Kingdom	33,9%	66,1%	1634
Germany	39,3%	60,7%	995
France	29,6%	70,4%	848