

A photograph of three people ice climbing on a glacier in Iceland. The climbers are wearing helmets, harnesses, and ice axes. The glacier is a mix of white and blue ice, with a dark, rocky landscape in the background. The sky is overcast with some light clouds. The text "Foreign travel professional survey about Icelandic tourism" is overlaid on the image in white, bold font.

# Foreign travel professional survey about Icelandic tourism

Submitted in January 2020



# Main findings

This survey was submitted in January 2020, that is before the effects of COVID-19 began to take a hold. These findings should be interpreted with that in mind.

The main findings are that the Net Promotor Score (NPS) for Iceland as a destination continues to measure high among travel professionals. On the whole it has grown and is well above average for all market areas. This is a positive sign for Icelandic tourism and indicates how strong the brand Iceland is among travel professionals. The NPS score for Iceland is not likely to be impacted by COVID-19 as this is a pandemic. If anything the Icelandic government's reaction has attracted positive attention abroad.

For the first time participants were asked if they agree or disagree with a statement about the sustainability of few destinations. Another positive sign was how high Iceland scored in this comparison. Participants are travel professionals that sell Iceland and therefore knowledgeable and critical about the situation in Iceland. Safety and the popularity of the destination continue to be the top positive factors that participants associate with the development of tourism in Iceland. The increased mentioning of marketing and sustainability are yet another positive sign for us to build our future work.

The price level continues to be the negative factor most often mentioned. It didn't come as a surprise that the air supply took a huge leap from previous surveys as the overall supply decreased last year for the first time for several years. We can however look at it positively that fewer mentioned the changes in visitor numbers and availability of service from local suppliers than in previous surveys.

The majority of participants reported similar or better bookings for last year compared to same time a year ago. They were also optimistic for this winter season and this year as a whole. These are though the findings that we need to interpret with precaution given the affects of COVID-19. Participants from distant markets stood out with noteworthy higher bookings and expectations for all three periods. The greatest turnarounds are among participants from the United Kingdom.





# Fieldwork summary

Promote Iceland carried out an attitude survey in January 2020 amidst foreign travel professionals that sell tours to Iceland. Their outlook on the development of Icelandic tourism and prospects regarding sales of tours to Iceland were surveyed. A comparable survey has been carried out twice a year since 2017.

The survey was sent by email to over 3000 travel professionals that sell tours to Iceland, All in all 384 took part in the survey, 348 of whom completed it in whole.

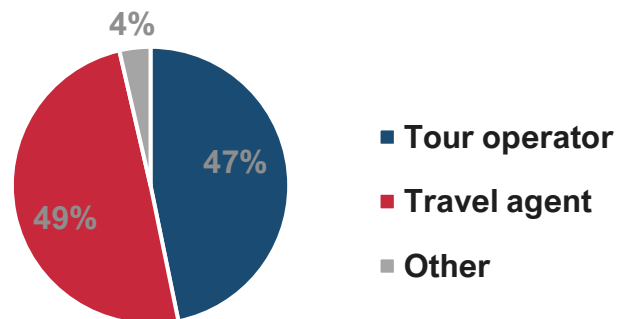
**Fieldwork period:** January 2020

**Methodology:** Online Survey

**Sample:** Foreign travel professional that offer tours to Iceland

**Languages:** English, French, German and Spanish

Proportional breakdown of participants by categories



Market Area	Country	Number	Proportion
<b>N-America</b> (122 answers)	Canada	36	9%
	United States	86	22%
<b>Central- &amp; Southern Europe</b> (129 answers)	Austria	2	0%
	Belgium	2	0%
	France	11	3%
	Germany	31	8%
	Italy	27	7%
	Netherlands	13	3%
	Spain	33	9%
	Switzerland	10	3%
<b>Nordic countries</b> (38 answers)	Denmark	26	7%
	Norway	7	2%
	Sweden	5	1%
<b>British isles</b> (20 answers)	Ireland	19	5%
	United Kingdom	1	0%
<b>Eastern Europe</b> (14 answers)	Poland	5	1%
	Other countries	4	1%
	Russia	5	1%
<b>Distant markets</b> (61 answers)	Argentina	5	1%
	Australia	2	0%
	Brazil	11	3%
	India	32	8%
	Malaysia	2	0%
	Other counties	7	2%
	United Arabic Emirates	2	0%
	<b>Sum:</b>		384



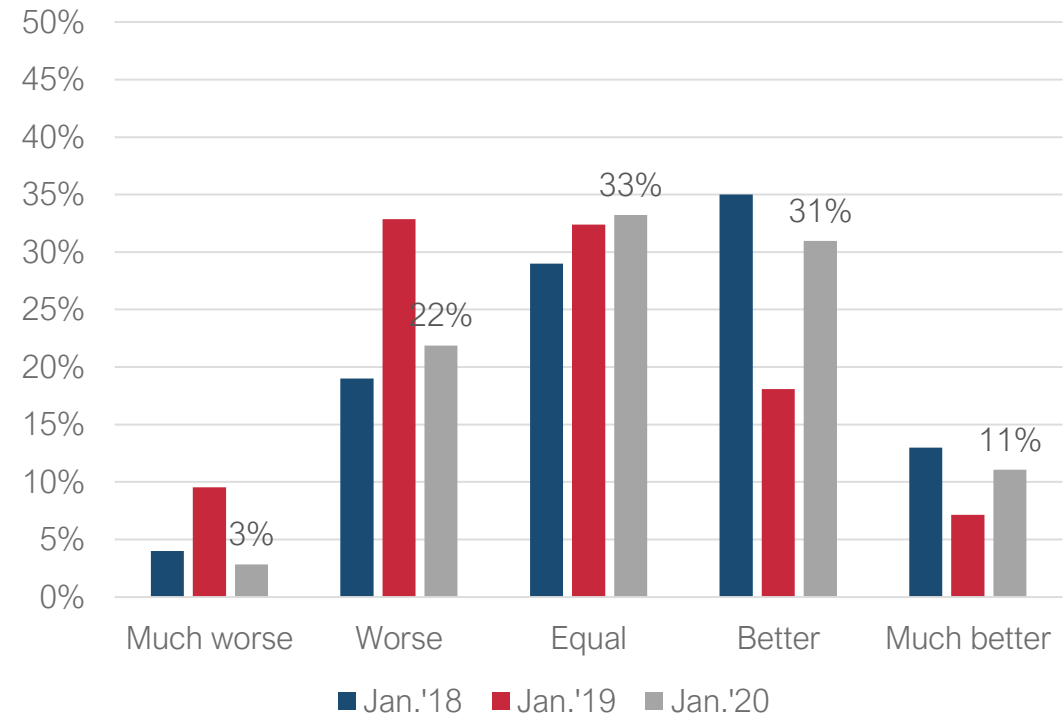
# Booking status for Iceland last year

75% of participants said their sales were similar or better last year

**+18% from January 2019**

**-2% from January 2018**

Compared to 2018, how are the number of bookings to Iceland with arrivals in 2019 for your company?





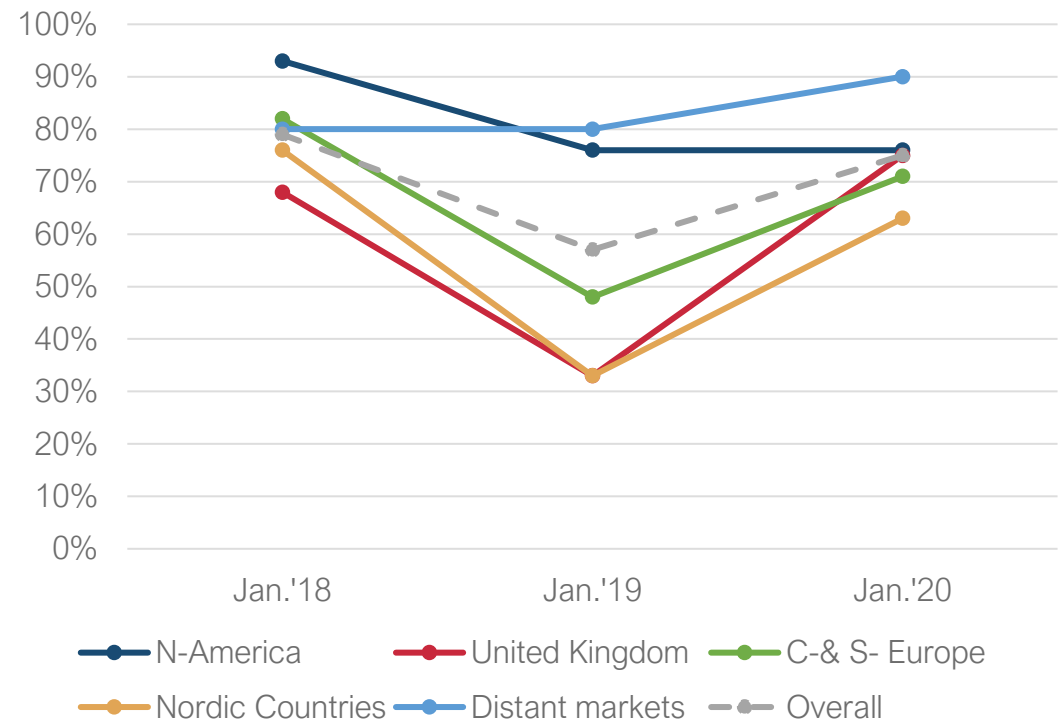
# Booking status for Iceland last year

## Market breakdown

Overall a higher proportion of participants reported on similar or better booking status for last year, compared to the previous year.

The market areas differ a bit in their responses, but the proportion is higher for all markets apart from N-America, with a proportion about the same as it was a year ago.

Proportion of those that reported similar or increased number of bookings in 2019





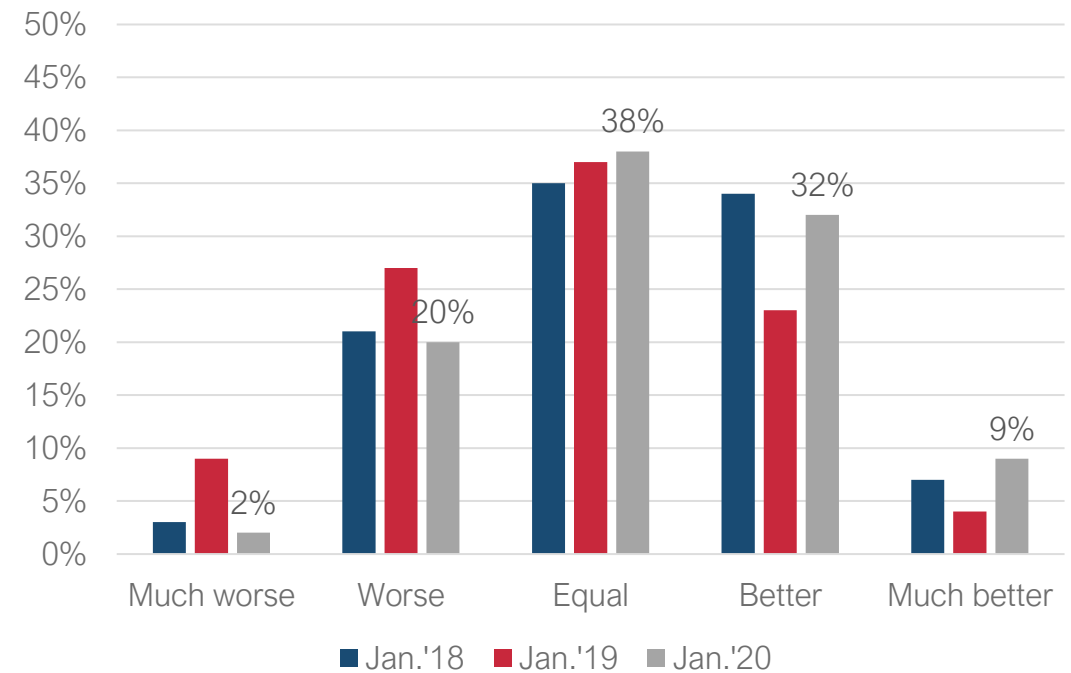
# Expectations about bookings to Iceland this winter

79% of participants said they expected equal or better number of bookings this winter

**+15% from January 2019**

**+3% from January 2018**

Compared to last winter season what is your company's prospects for bookings to Iceland with arrivals this winter season?



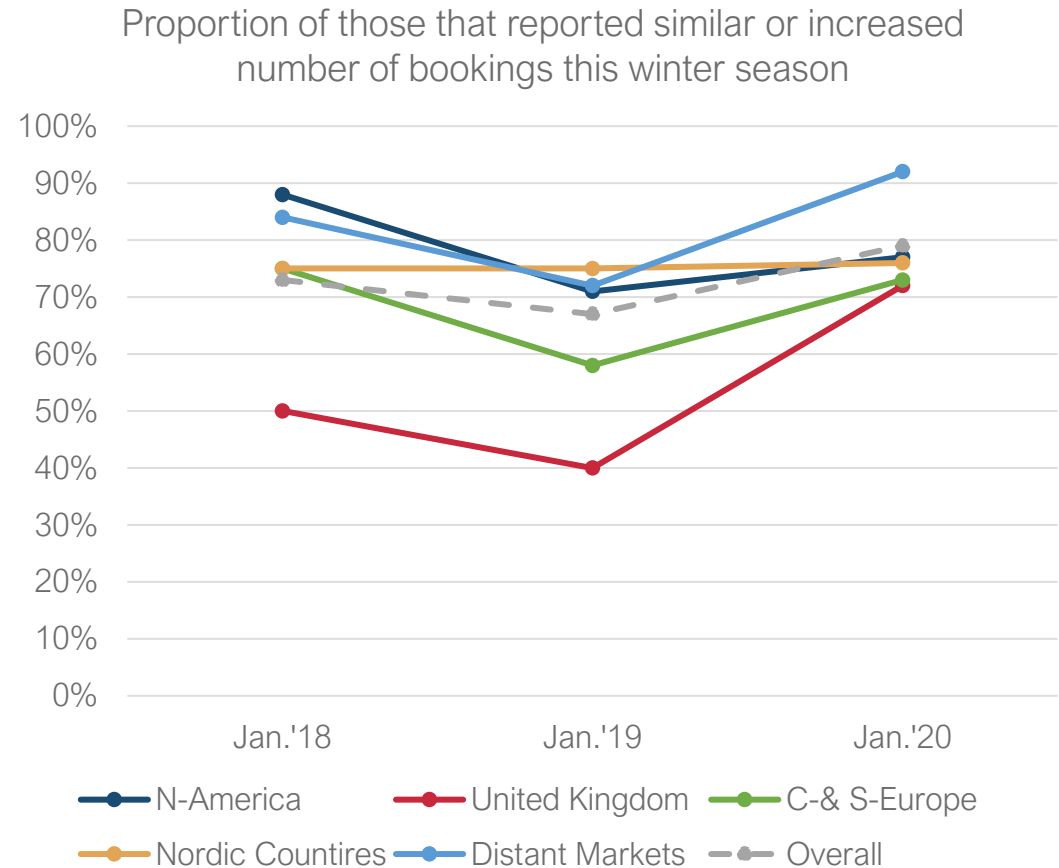


# Expectations about bookings to Iceland this winter

## Market breakdown

Participants from all markets said they expected similar or better booking status this winter season than a year ago.

In certain markets the proportion is also higher than it was two years ago, although overall the difference is not significant.





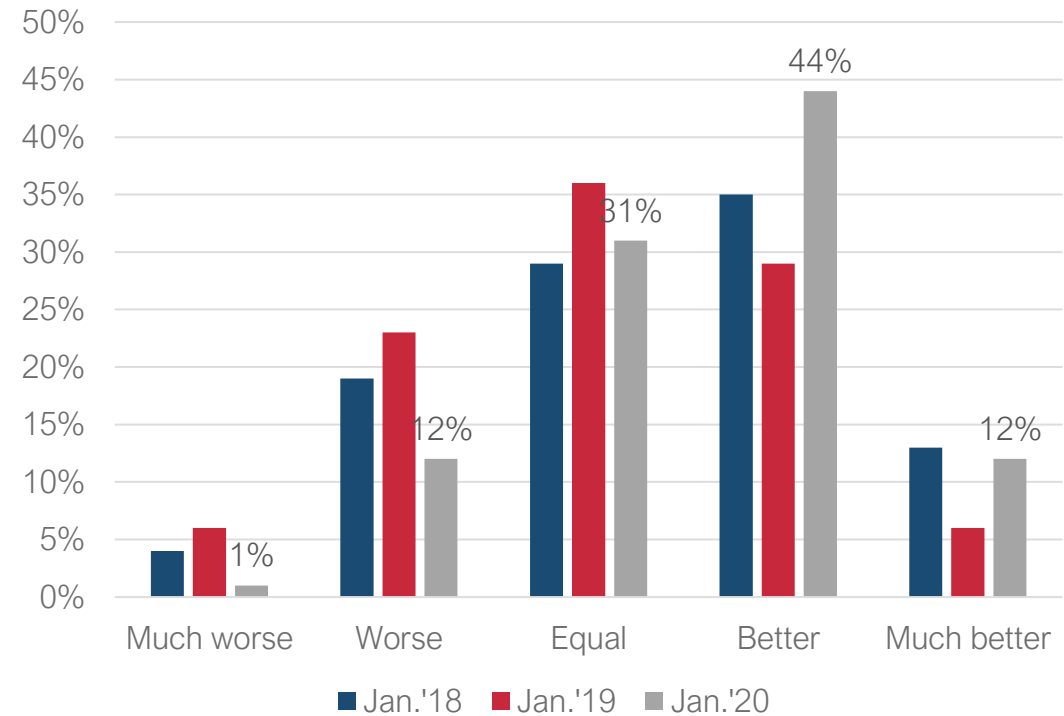
# Expectations about bookings to Iceland this year

87% of participants expect equal or better number of bookings this year

**+16% from January 2019**

**+10% from January 2018**

Compared to 2019, what is your company's prospects for bookings to Iceland in 2020?







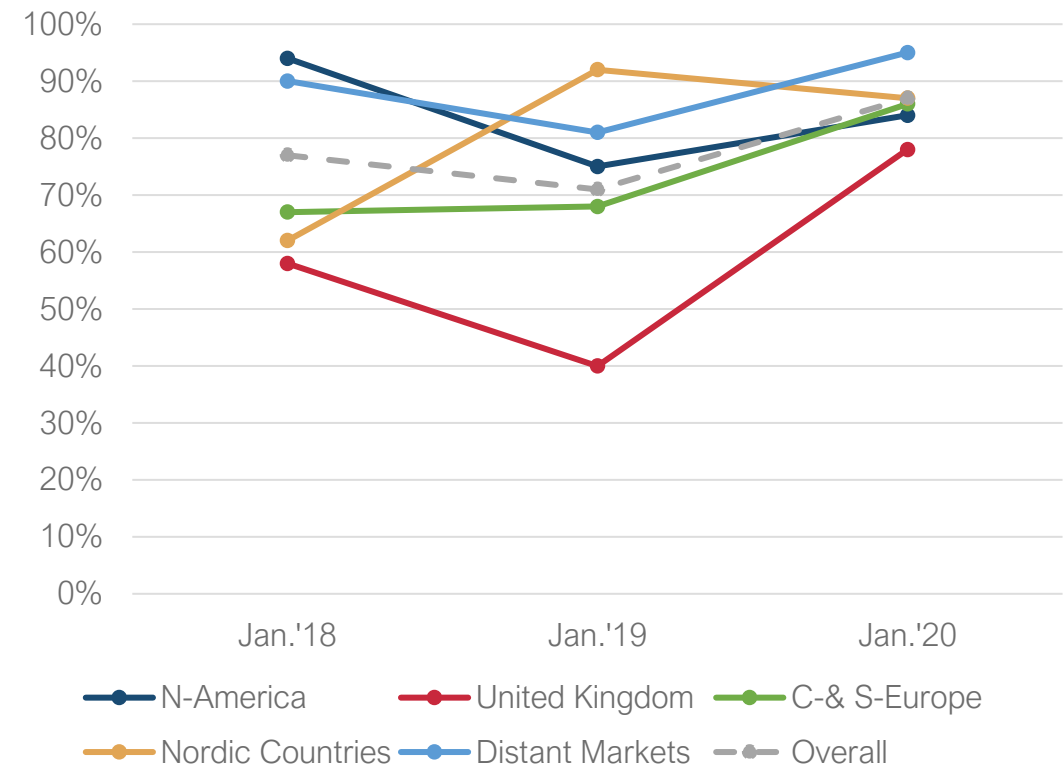
# Expectations about bookings to Iceland this year

## Market breakdown

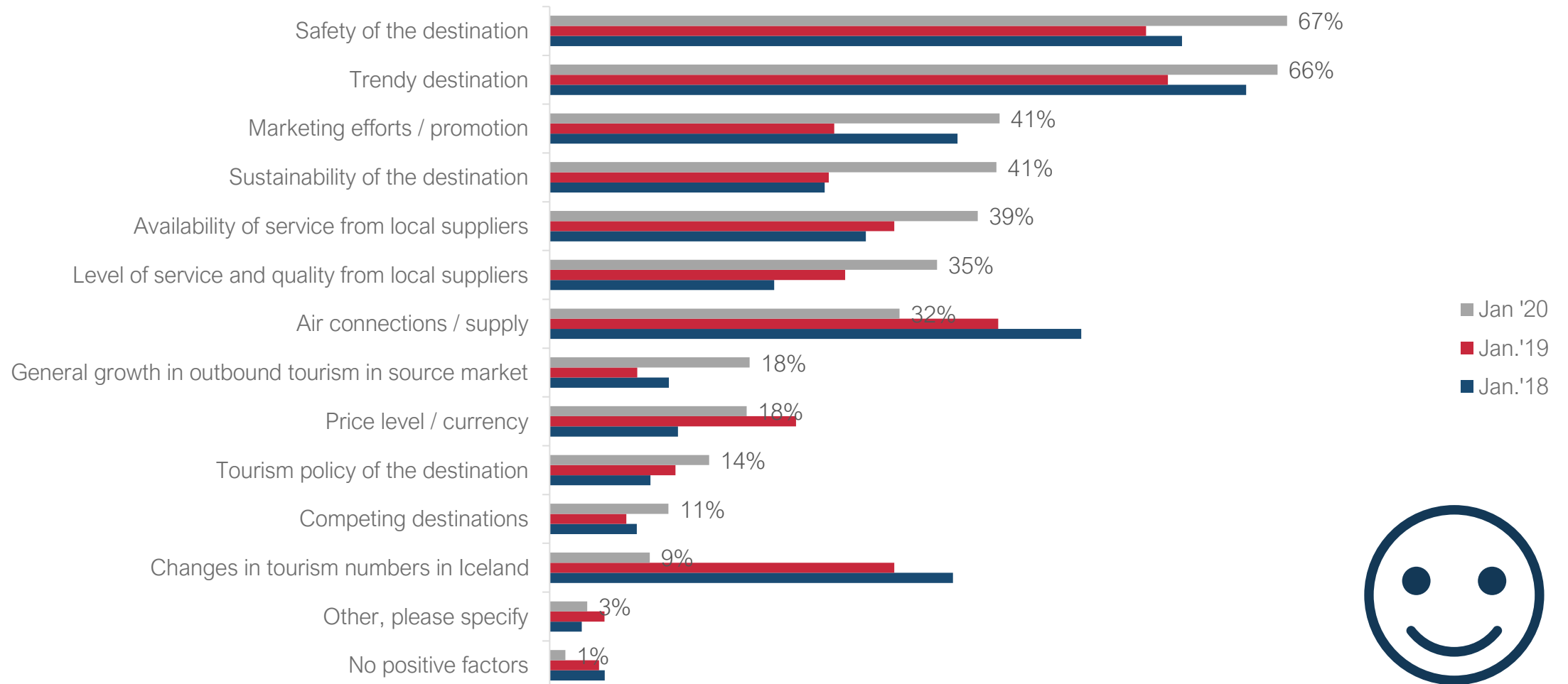
Over all a higher proportion of participants expect a similar or better booking status this year, compared to last year.

The proportion is also higher than it was two years ago, although the difference is not as significant. It's only among participants from N-America that the proportion is lower than it was two years ago.

Proportion of those that expect similar or increased number of bookings in 2019



# Top positive factors for the development of tourism in Iceland



\*In your opinion, what are the top five positive factors for the development of tourism in Iceland this year? (Please select up to 5 factors)

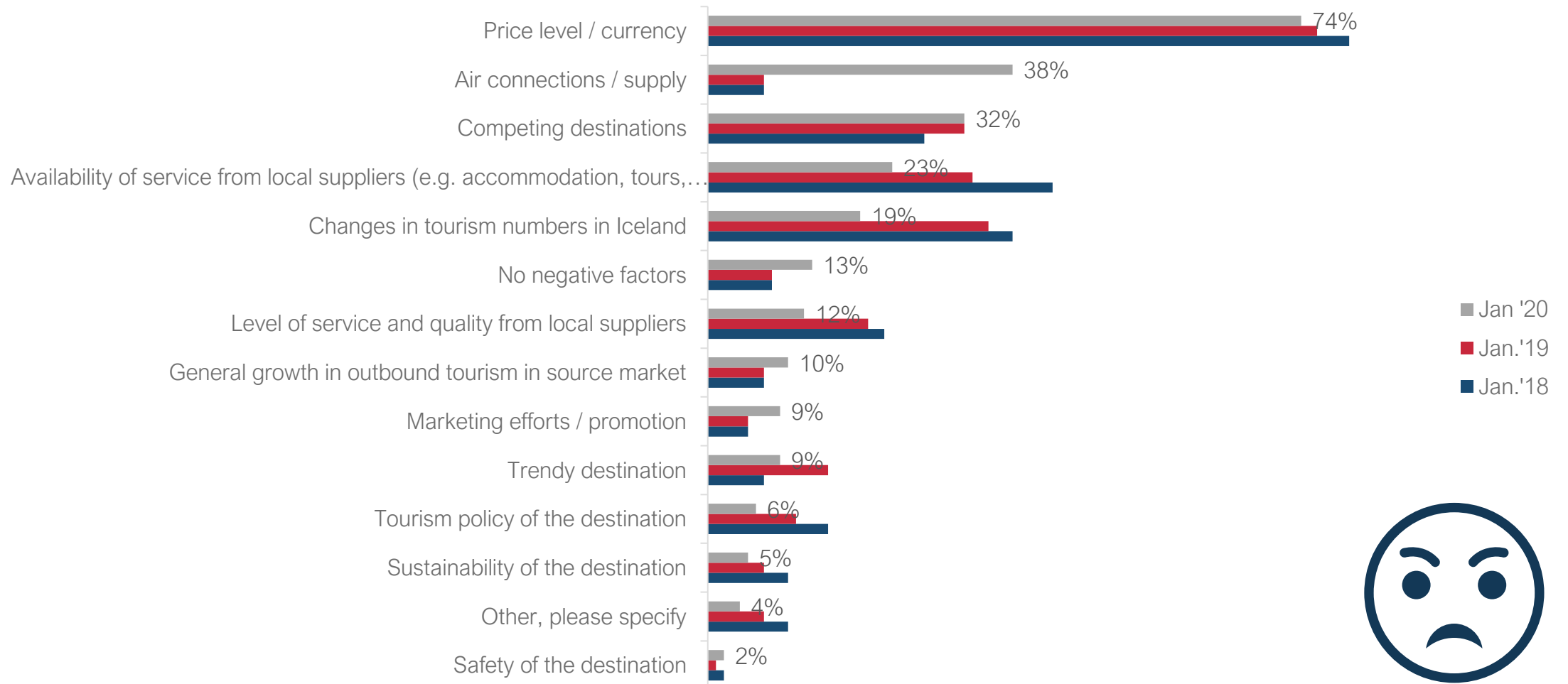


# Top positive factors for the development of tourism in Iceland

## Market breakdown

	All market areas	N-America	C- & S-Europe	Nordic Countries	Distant markets	United States	United Kingdom	Germany
Safety of the destination	64,23%	69,49%	78,33%	32,43%	53,97%	71,08%	38,89%	86,21%
Trendy destination	63,14%	70,34%	69,17%	51,35%	52,38%	74,70%	38,89%	72,41%
Marketing efforts / promotion	39,84%	37,29%	40,00%	29,73%	55,56%	32,53%	5,56%	41,38%
Sustainability of the destination	38,75%	40,68%	52,50%	18,92%	31,75%	38,55%	22,22%	44,83%
Availability of service from local suppliers	37,40%	46,61%	26,67%	40,54%	41,27%	44,58%	33,33%	17,24%
Level of service and quality from local suppliers	33,88%	38,98%	24,17%	35,14%	46,03%	34,94%	33,33%	10,34%
Air connections / supply	30,89%	36,44%	32,50%	21,62%	20,63%	33,73%	27,78%	44,83%
Price level / currency	17,89%	18,64%	13,33%	37,84%	9,52%	15,66%	22,22%	27,59%
General growth in outbound tourism in source market	17,34%	16,10%	7,50%	13,51%	39,68%	14,46%	11,11%	0,00%
Tourism policy of the destination	13,82%	12,71%	11,67%	16,22%	20,63%	13,25%	11,11%	13,79%
Competing destinations	10,30%	8,47%	7,50%	10,81%	19,05%	7,23%	5,56%	0,00%
Change in tourism numbers in Iceland	8,94%	9,32%	5,83%	10,81%	11,11%	12,05%	11,11%	3,45%
Other	3,52%	3,39%	0,83%	2,70%	9,52%	3,61%	0,00%	0,00%
No positive factors	1,36%	0,00%	0,83%	8,11%	0,00%	0,00%	5,56%	0,00%

# Top negative factors for the development of tourism in Iceland



\*In your opinion, what are the top five negative factors for the development of tourism in Iceland this year? (Please select up to 5 factors)



# Top negative factors for the development of tourism in Iceland

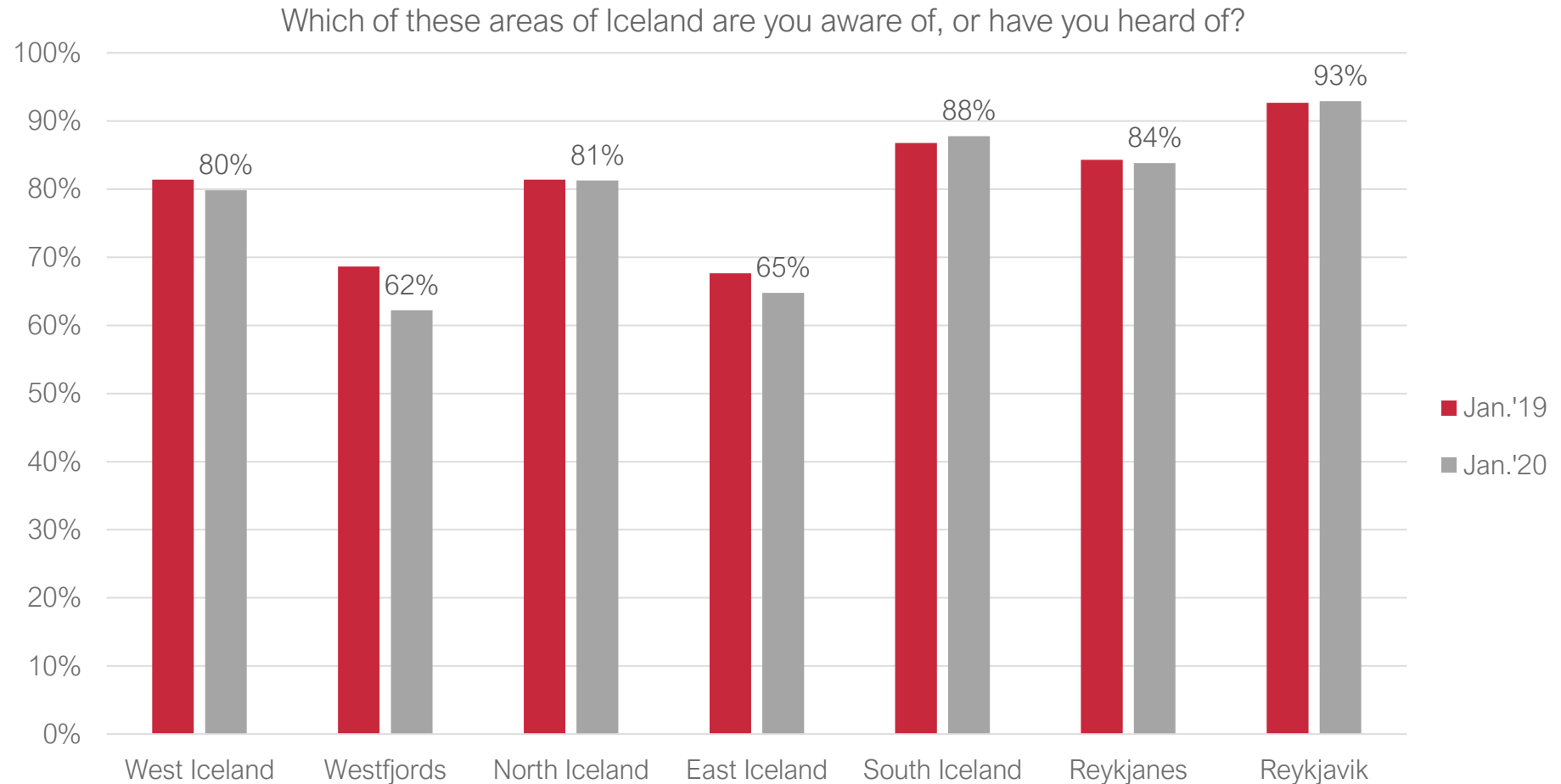
## Market breakdown

	All market areas	N-America	C- & S-Europe	Nordic Countries	Distant markets	United States	United Kingdom	Germany
Price level / currency	70,73%	63,56%	77,50%	78,38%	69,84%	59,04%	55,56%	80,77%
Air connections / supply	36,31%	22,03%	41,67%	32,43%	53,97%	21,69%	44,44%	30,77%
Competing destinations	31,17%	35,59%	27,50%	32,43%	31,75%	31,33%	38,89%	34,62%
Availability of service from local suppliers	21,95%	17,80%	28,33%	24,32%	15,87%	19,28%	22,22%	23,08%
Changes in tourism numbers in Iceland	18,97%	22,03%	21,67%	10,81%	7,94%	22,89%	22,22%	53,85%
No negative factors	12,74%	16,10%	10,00%	5,41%	20,63%	18,07%	5,56%	19,23%
Level of service and quality from local suppliers	11,92%	6,78%	17,50%	21,62%	6,35%	7,23%	11,11%	3,85%
General growth in outbound tourism in source market	9,21%	8,47%	7,50%	13,51%	11,11%	8,43%	11,11%	15,38%
Trendy destination	8,94%	8,47%	5,83%	5,41%	19,05%	6,02%	11,11%	7,69%
Marketing efforts / promotion	8,94%	13,56%	5,83%	10,81%	4,76%	14,46%	5,56%	7,69%
Tourism policy of the destination	5,96%	2,54%	10,00%	5,41%	3,17%	2,41%	5,56%	0,00%
Sustainability of the destination	4,61%	3,39%	2,50%	8,11%	4,76%	3,61%	11,11%	3,85%
Other, please specify	4,07%	3,39%	3,33%	2,70%	9,52%	3,61%	0,00%	3,85%
Safety of the destination	2,17%	1,69%	0,00%	5,41%	3,17%	2,41%	0,00%	0,00%





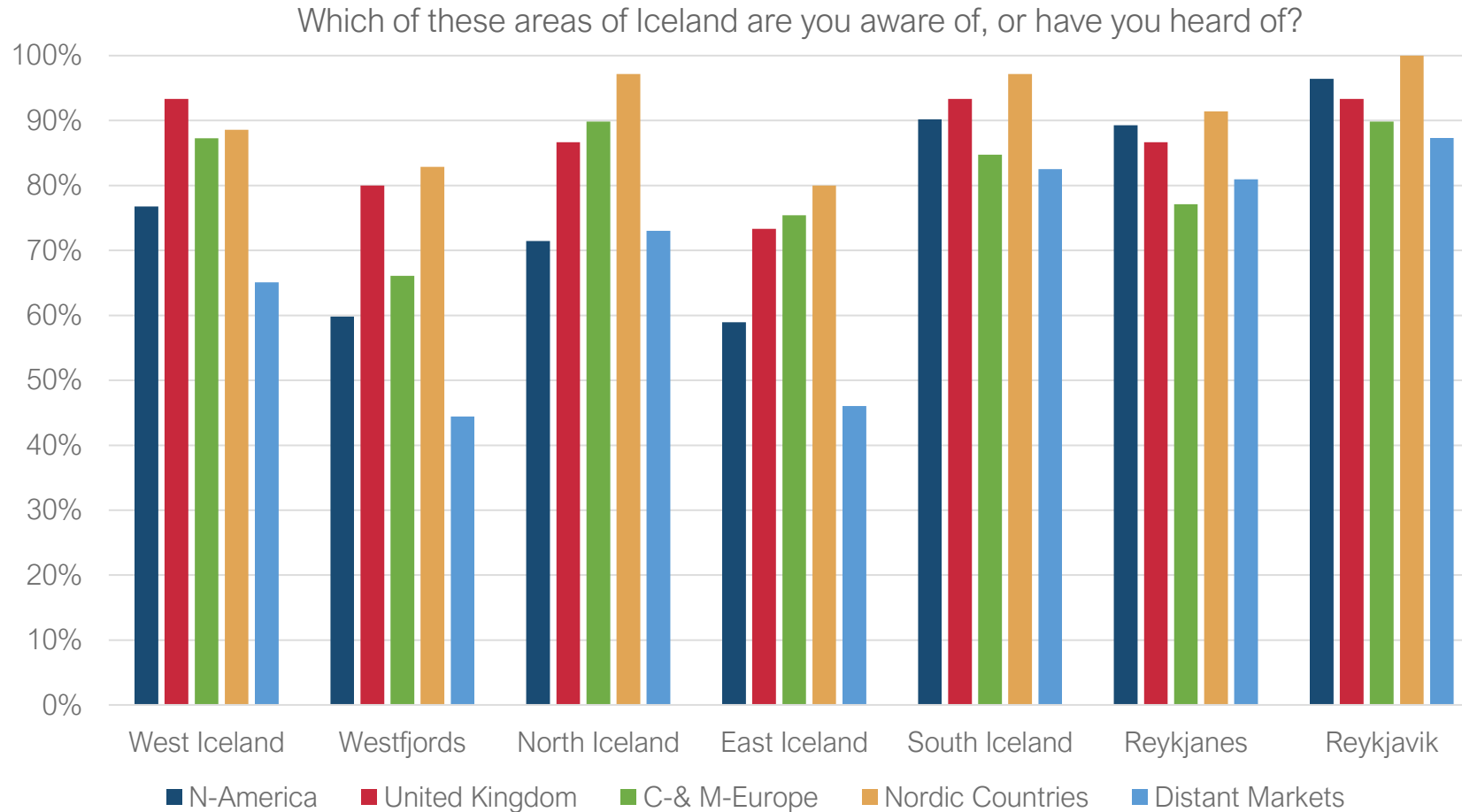
# Knowledge of the Icelandic regions





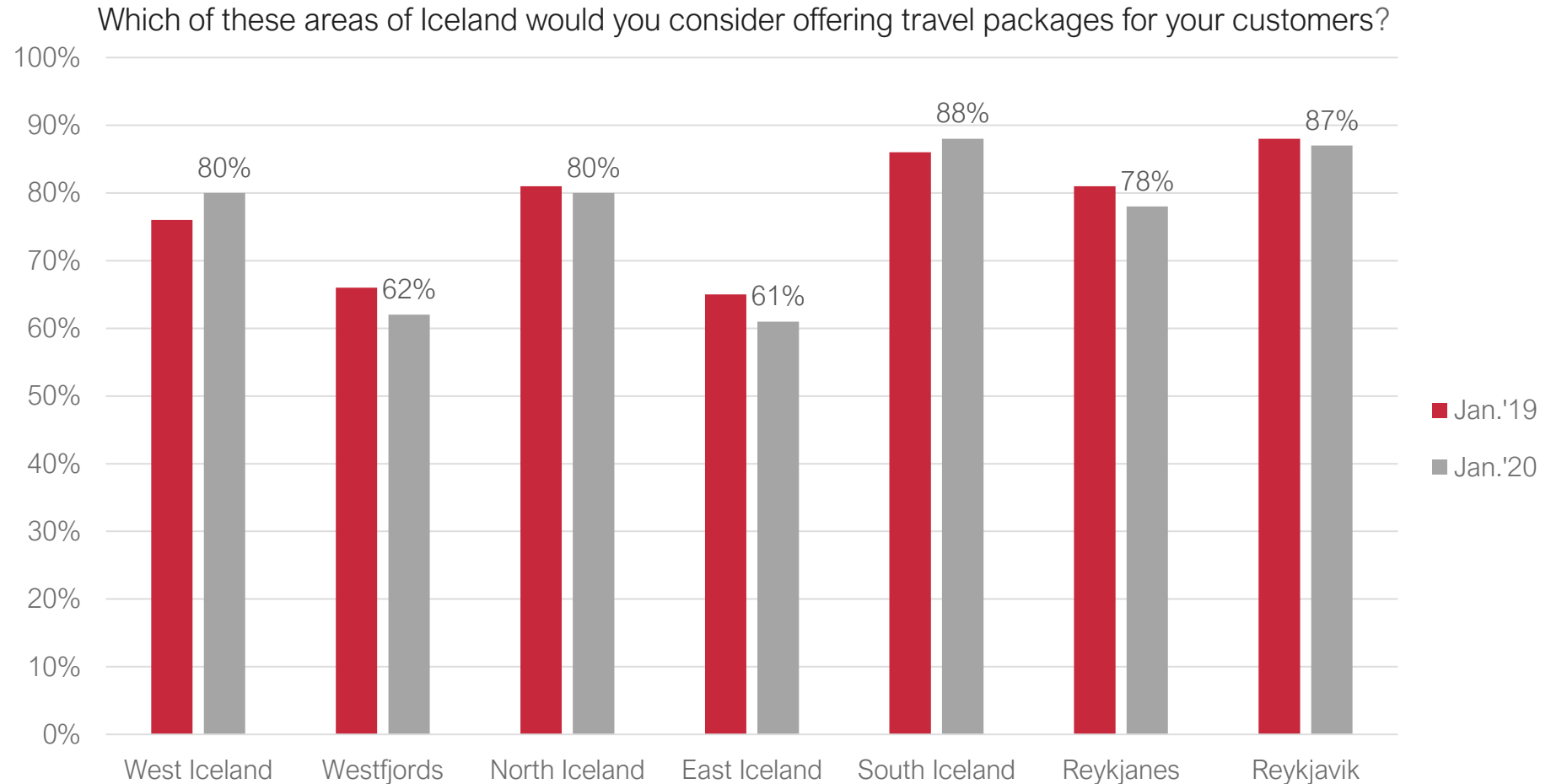
# Knowledge of the Icelandic Regions

## Market breakdown





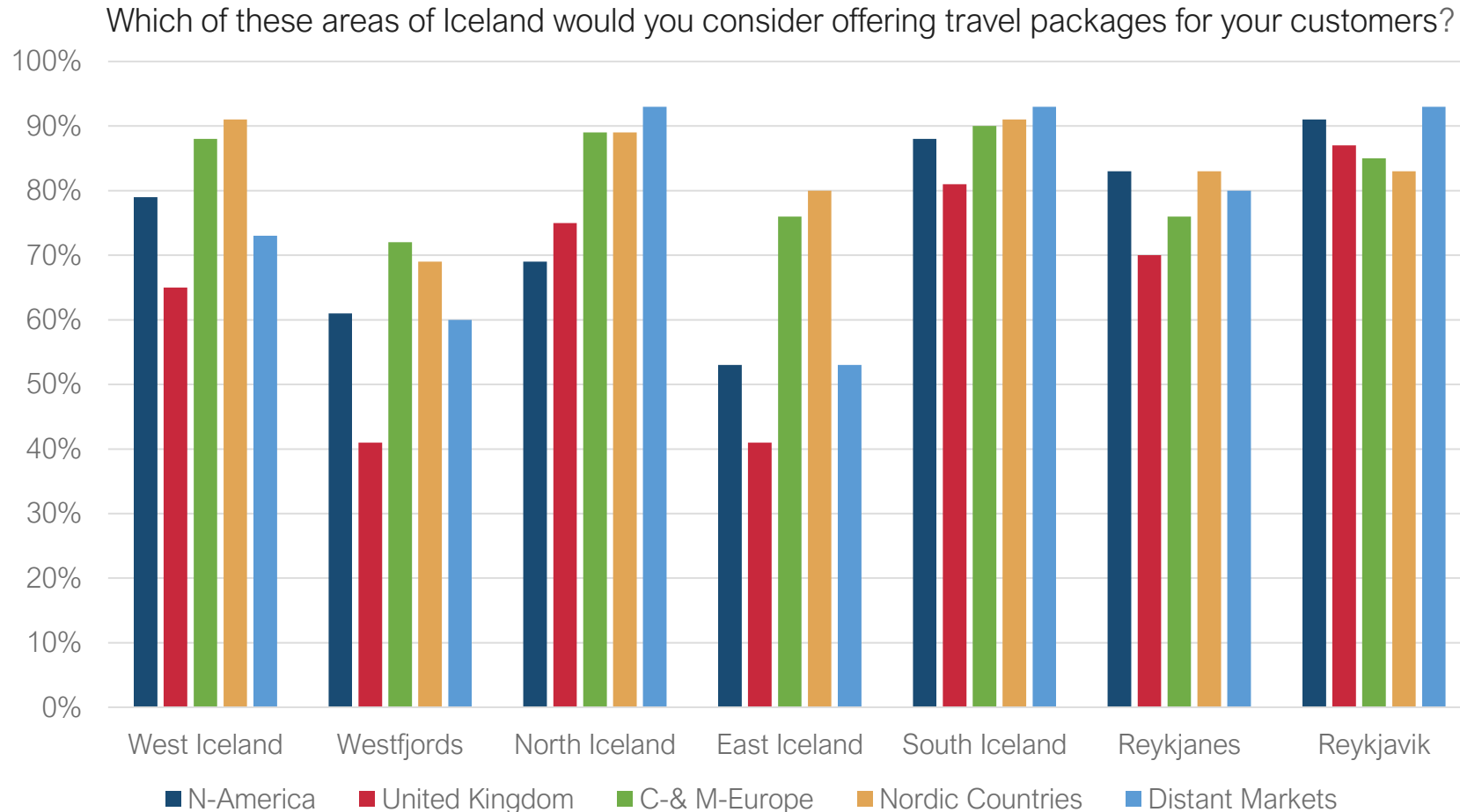
# Knowledge of the Icelandic Regions





# Knowledge of the Icelandic Regions

## Market breakdown





# Net Promoter Score (NPS)

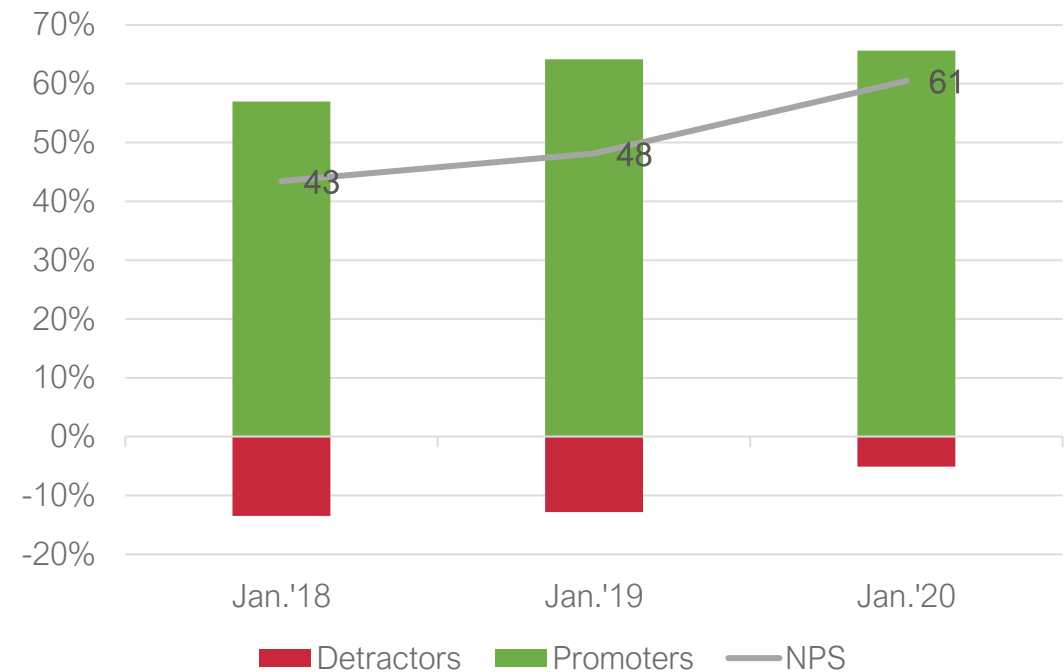
The NPS score for Iceland as a destination was 61 points

**+12% from January 2019**

**+17% from January 2018**

*“Net Promoter Score is a metric for customer experience and predicts business growth based on grouping customers into three categories: promoters (9-10), passive (7-8) and detractors (0-6).”*

On a scale from 0-10, how likely are you to recommend Iceland as travel destination to a customer or a colleague?







# Net Promoter Score (NPS)

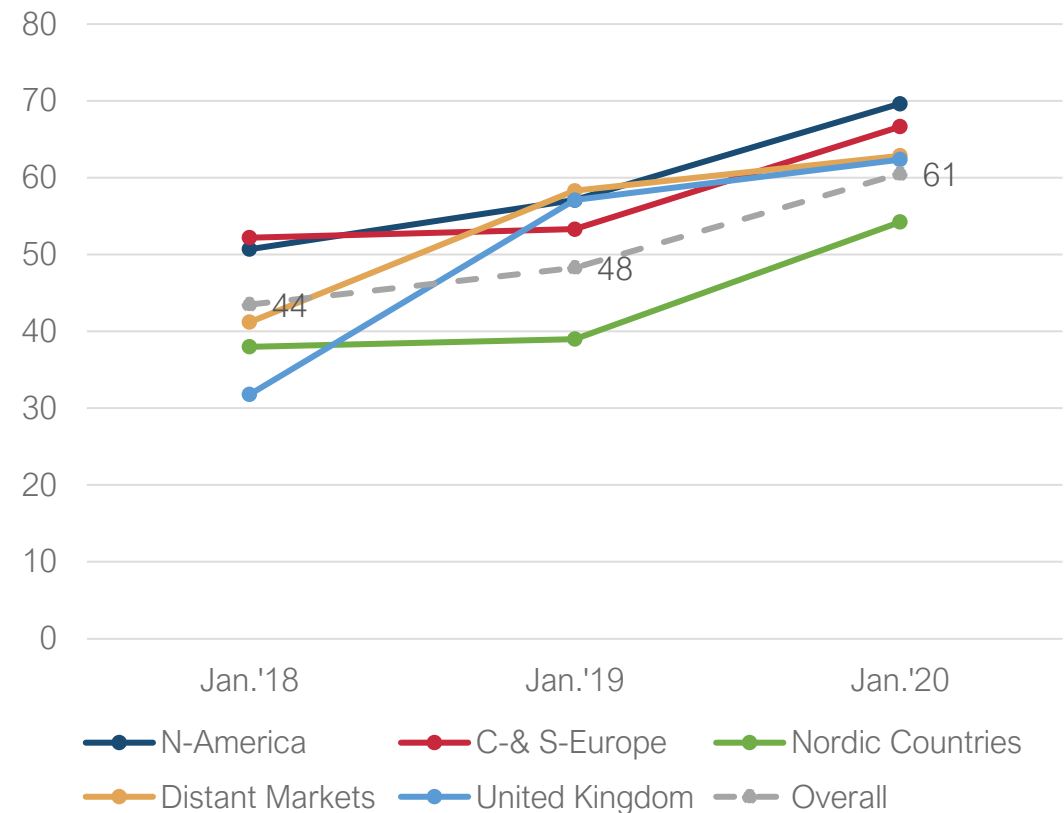
## Market breakdown

The NPS score is higher in all market areas compared to previous years.

The highest NPS score was among participants from North America but the lowest from Central & Southern Europe.

The great turnover in the NPS score among participants from the Nordic countries are noteworthy.

Change in the NPS score by year and markets





## NPS

Why are “**detractors**” not recommending Iceland as a destination?

*“Less option for flight connectivity”*

*“price/quality  
unbalanced ratio”*

*“There are not enough luxury hotels.”*

*“I am not familiar with Iceland so I don't know how to promote it...”*

## What would it take to make “**neutrals**” more likely to recommend Iceland as a destination?

*“More 5\* luxury properties with high level of service + high-end design”*

*“Improvement of air connections in winter”*

***“More competitive prices compared to other destinations”***

***“Less tourists, more sustainability”***

*“Difficult to recommend when you have only studied the destination and not visited”*



## NPS

### Why are “promoters” recommending Iceland as a destination?

*“because it is elusive but on most people’s list for travel”*

*“Iceland is a wondrous place where you may experience adventure, beauty and culture like no where else on earth.”*

***“Because Iceland is a unique destination.”***

*“Iceland is a breathtakingly beautiful country with friendly people, and it offers a wide range of outdoor activities”*

***“Iceland continues to be an intriguing destination within easy reach.”***

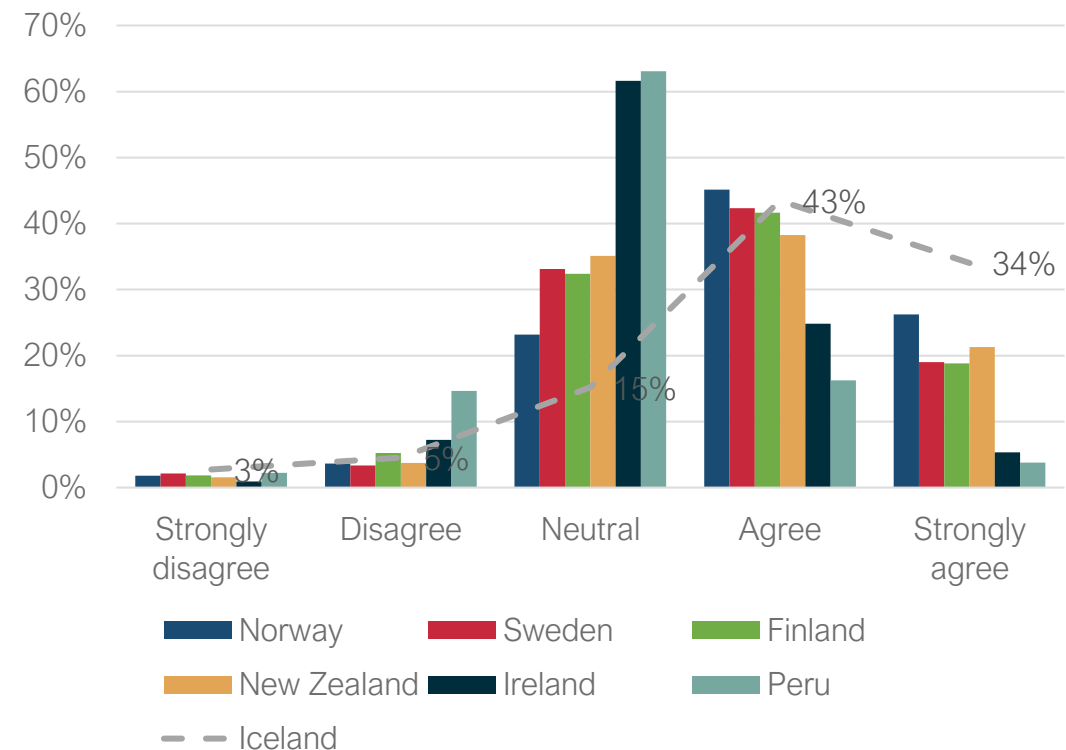
*“Iceland have so much to offer all kinds of people - young, families, seniors etc.”*

# Leading in sustainable development

Over all the majority of participants either agree or agree strongly with the statement that Iceland is a leading destination in sustainable development.

Compared to the other destinations Norway comes closes to Iceland. The other Nordic Countries and New Zealand also have a strong link to sustainable development in the minds of participants.

Do you agree or disagree with the following statement? "This country is leading in sustainable development"







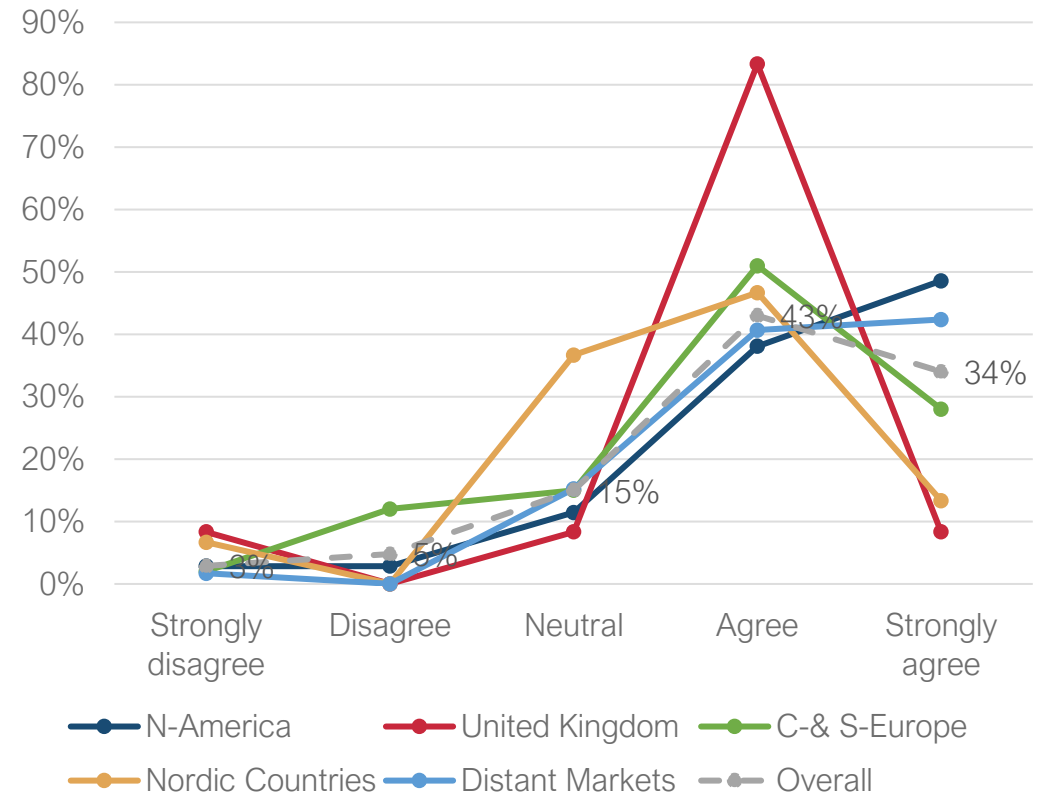
# Leading in sustainable development

## Market breakdown

When the answers are broken down to market areas we see some harmony apart from participants from the United Kingdom.

It's though noteworthy that proportionally many participants from the Nordic Countries are neutral.

"Iceland is a leading destination in sustainable development"





# RESEARCH PREPARED BY PROMOTE ICELAND

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