



Iceland Naturally

2017 Canada Consumer Research Report

Objectives and Methodology

Tracking consumer attitudes since 2008



Iceland Naturally has tracked consumer attitudes towards travel to Iceland and Icelandic products in Canada since 2008.

The study was conducted online among a nationally representative sample of 1,040 Canadian consumers aged 18 to 70.

The survey was conducted in April 2017.

The margin of error doesn't exceed +/-3.3% at 95% confidence level for the total sample.

The sample was weighted to reflect the demographic profile of the Canadian consumers based on the Census data.



Regions

Ontario

Quebec

Western Canada:

- British Columbia
- Saskatchewan
- Alberta
- Manitoba

Consumer Segments

The City Vacationer

16% Prefers city vacations



Frequent Traveler

29% travels outside Canada
2+ times a year



The Outdoor Type

11% Prefers vacations
in natural outdoor
environments;
destinations that offer
great outdoor activities;
destinations that have
an unusual landscape



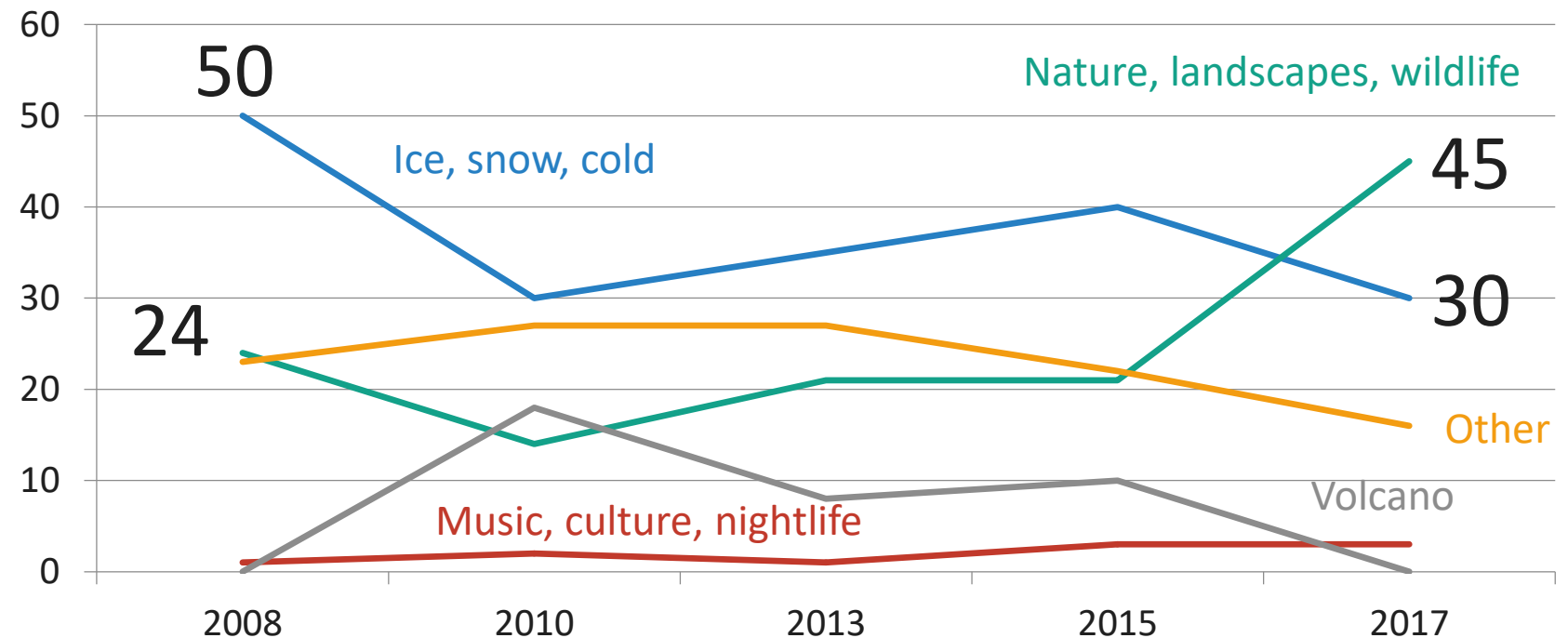
Travel to Iceland



For the first time,
NATURE
associations
have topped
ICE, SNOW
and **COLD**
associations

Top-of-mind Associations with Iceland

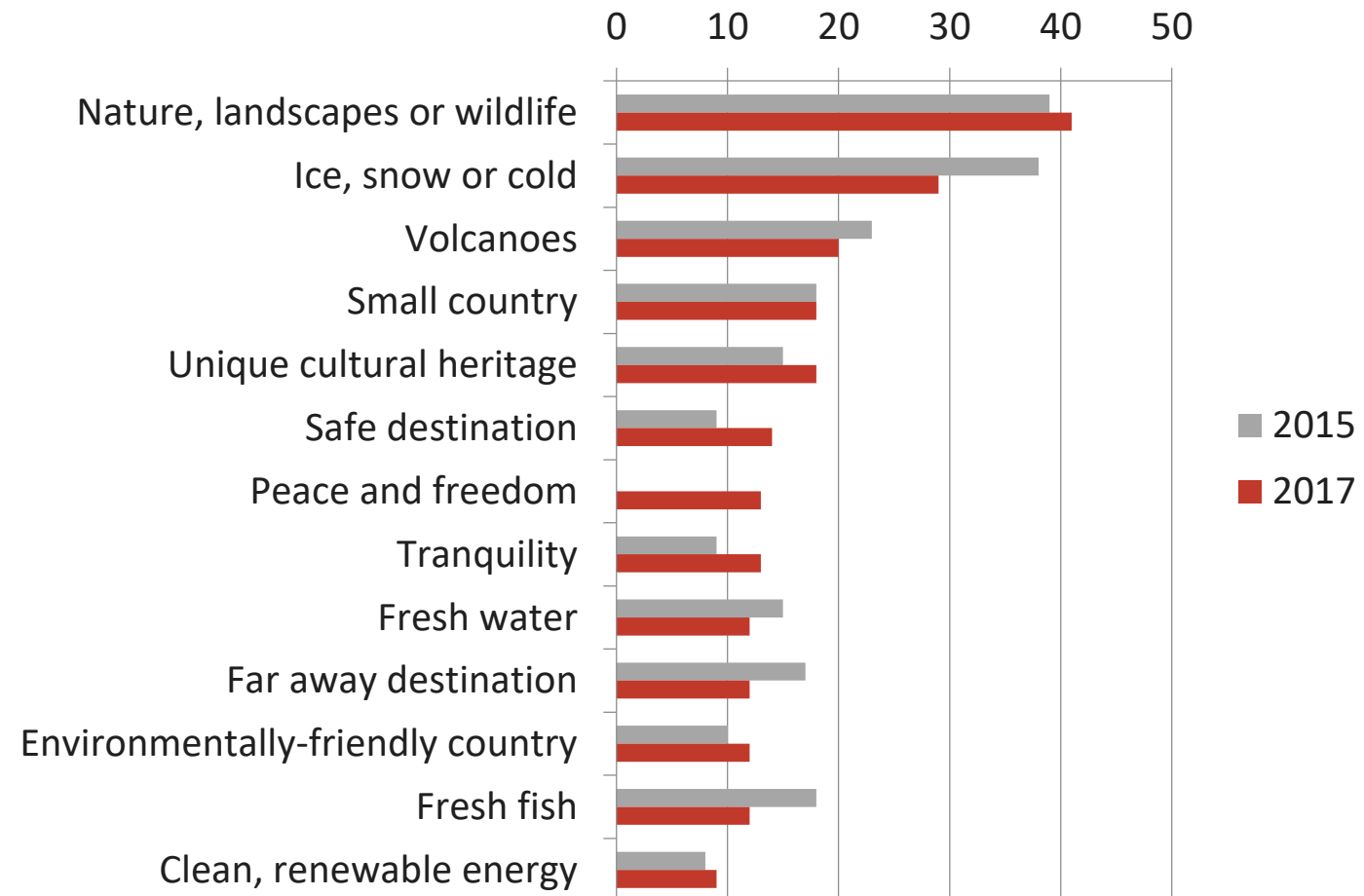
What is the first thing that comes to mind when you think of Iceland? (% open-ended)



Associations
with **ICE**,
SNOW and
COLD have
dropped from
38% in 2015
to **29%**.

Top-of-mind Associations with Iceland

Which of these things do you associate with
Iceland? (% , close-ended, top 3 choice)



Associations with Iceland in Consumers' Words

"A very cold place with a lot of Ice, but that is not true isn't it?"

"When I think of Iceland, I think of healthy friendly people who live an outdoors type of life."

"Crooked prime minister who got caught! And Bobby Fisher of course."

"People and the Scandinavian culture."

"A very environmentally forward country that uses clean practices for power. Also they jailed the people who caused their economic troubles, instead of giving them more money."

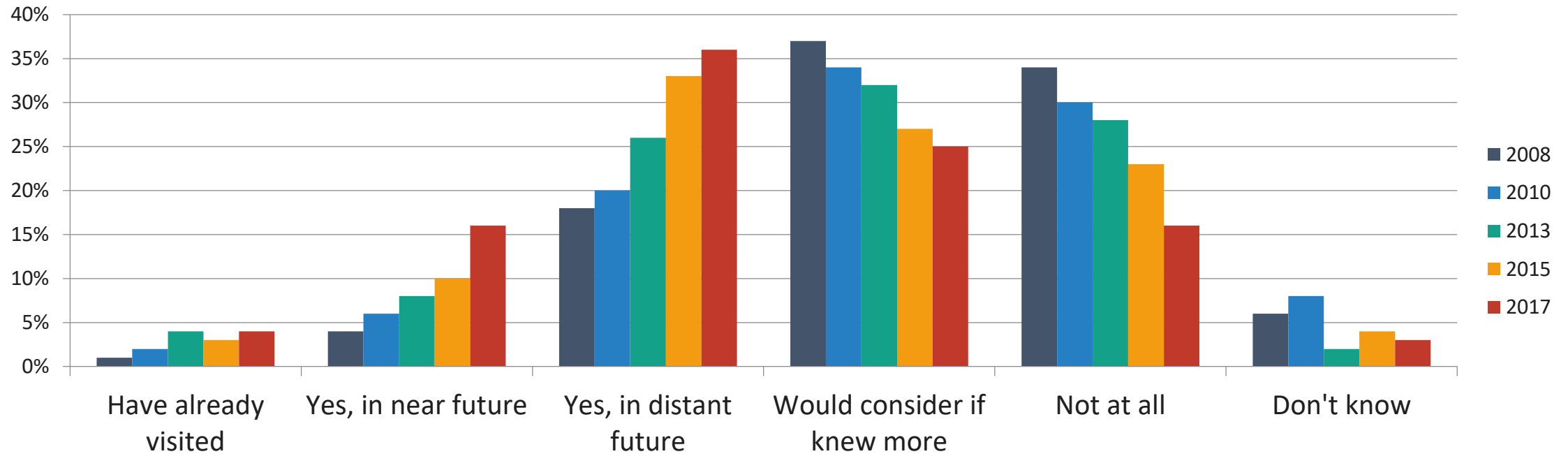
"A very unique country to visit, Still active volcanoes, beautiful sceneries, landmarks, friendly people."

"ICELANDAIR, FREE STOPOVER."

"So many great things at once! Hot springs, glaciers and waterfalls, great seafood. Viking chant, active volcanoes, very handsome people, high cost of living, no more McDonald's, world's oldest parliament, ladies with surnames that end in dottir (like daughter of) - and I did NOT cheat - this is just my top line knowledge of Iceland!"

"Volcanoes and beautiful sweaters."

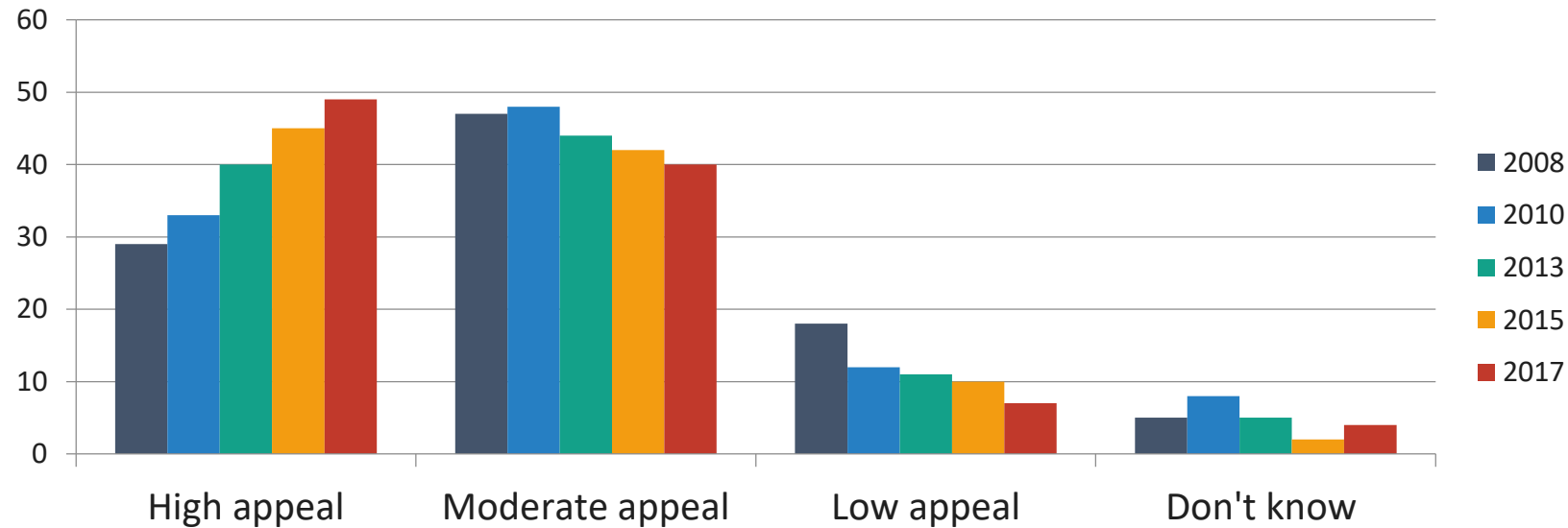
Intent to Travel to Iceland



Canadian consumers express a growing intent to travel to Iceland (56%). For the first time, the percent of consumers who have not considered travelling to Iceland has fallen below 20% (to 16%).

Appeal of Iceland

How appealing is Iceland as a travel destination to you?
(%, 10-point scale)

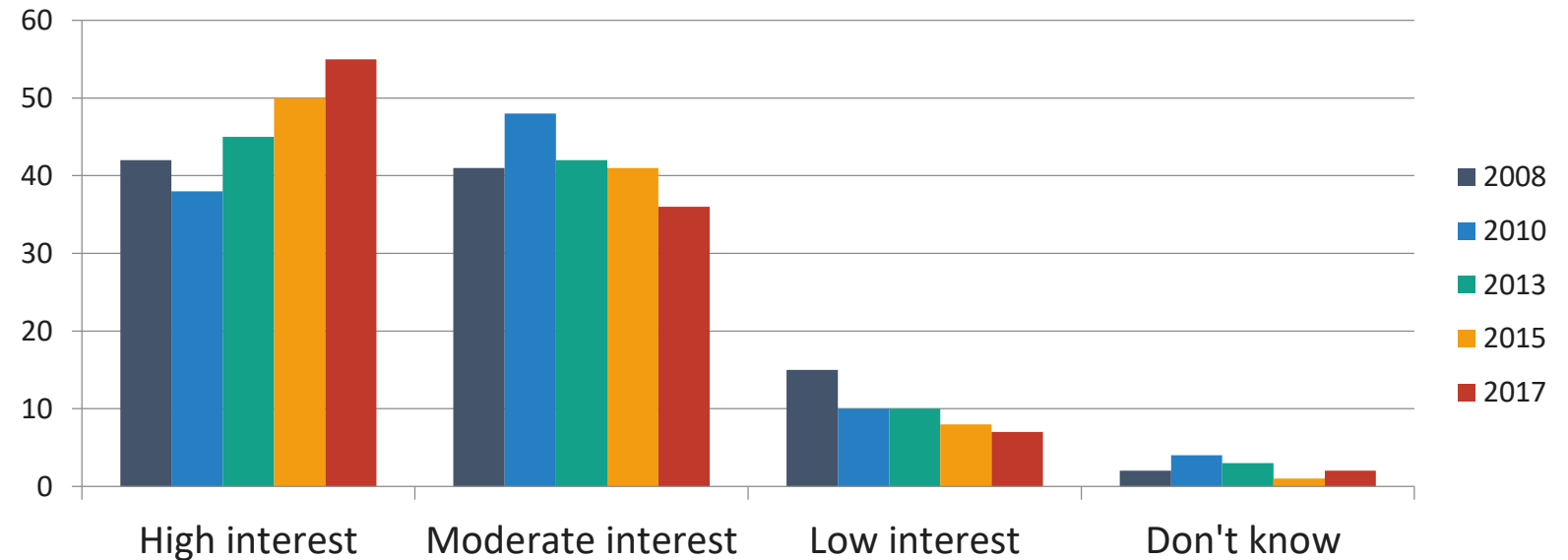


**NEARLY
HALF** of
Canadian
consumers (49%)
find Iceland a
**HIGHLY
APPEALING**
travel destination

55% of Canadian consumers are **HIGHLY INTERESTED** in learning more about Iceland

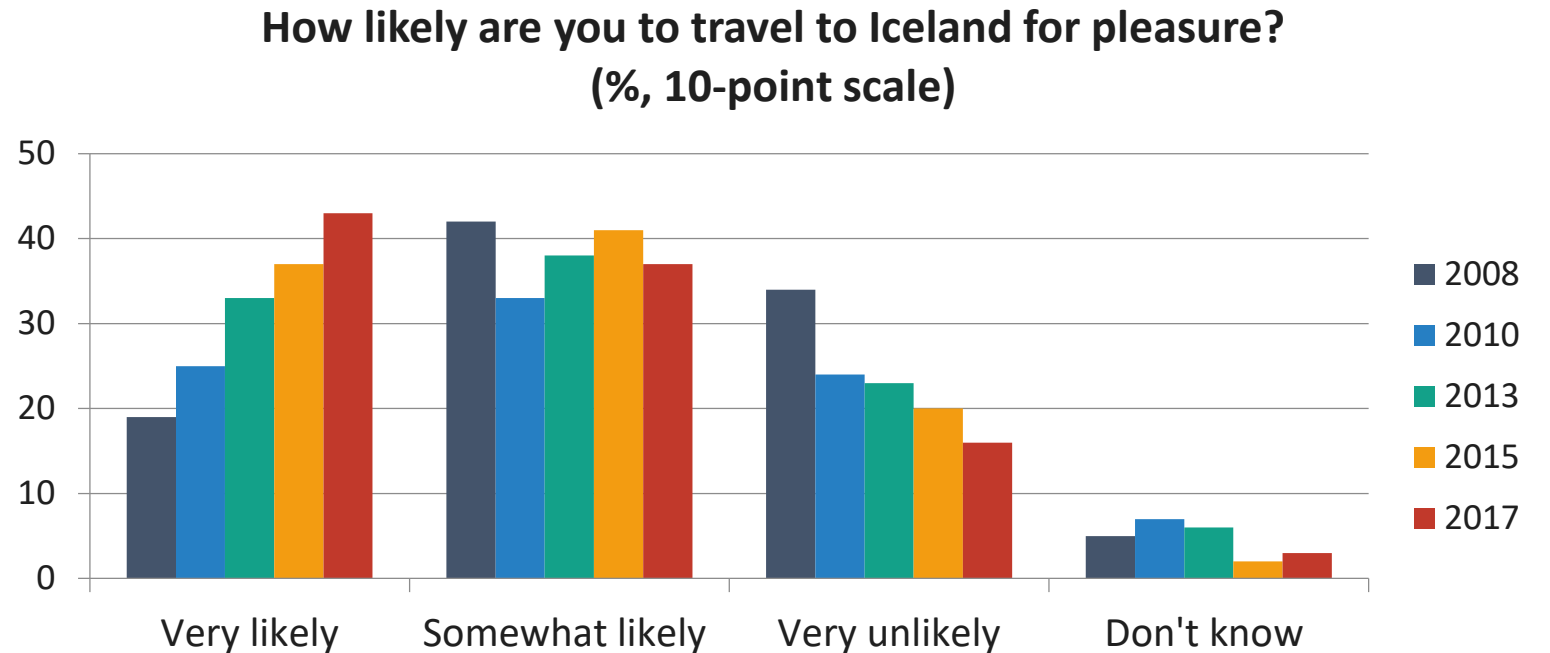
Interest in Iceland

How interested are you to learn more about Iceland?
(%, 10-point scale)



43% of Canadian consumers say they are **VERY LIKELY** to travel to Iceland for pleasure

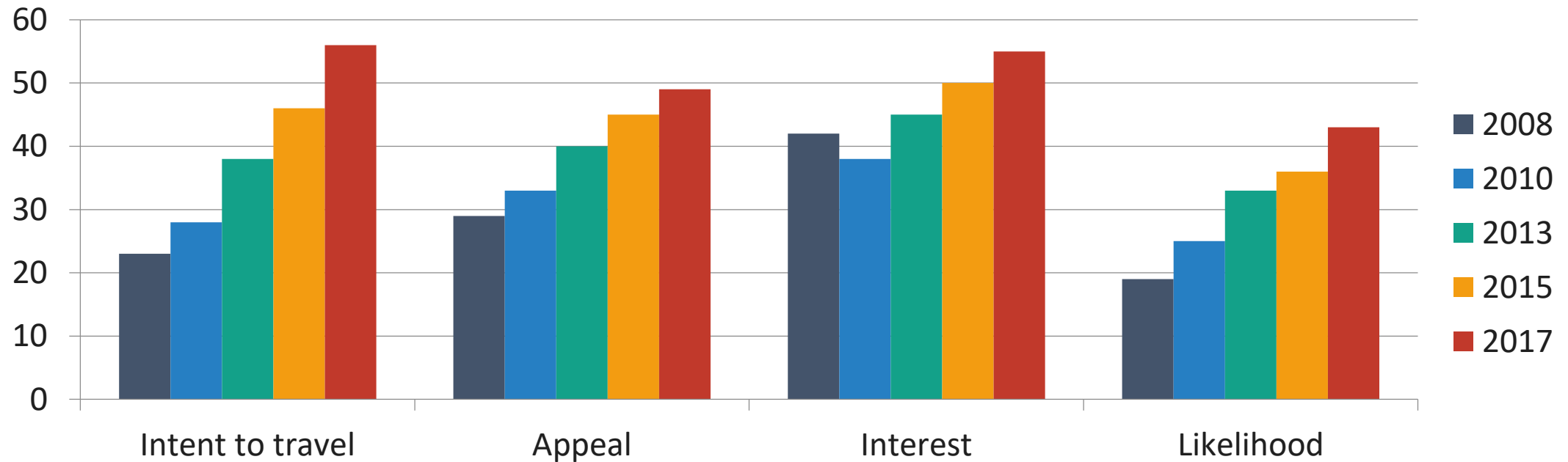
Likelihood of Travel to Iceland



Summary of Travel Attitudes



Summary of Travel Attitudes



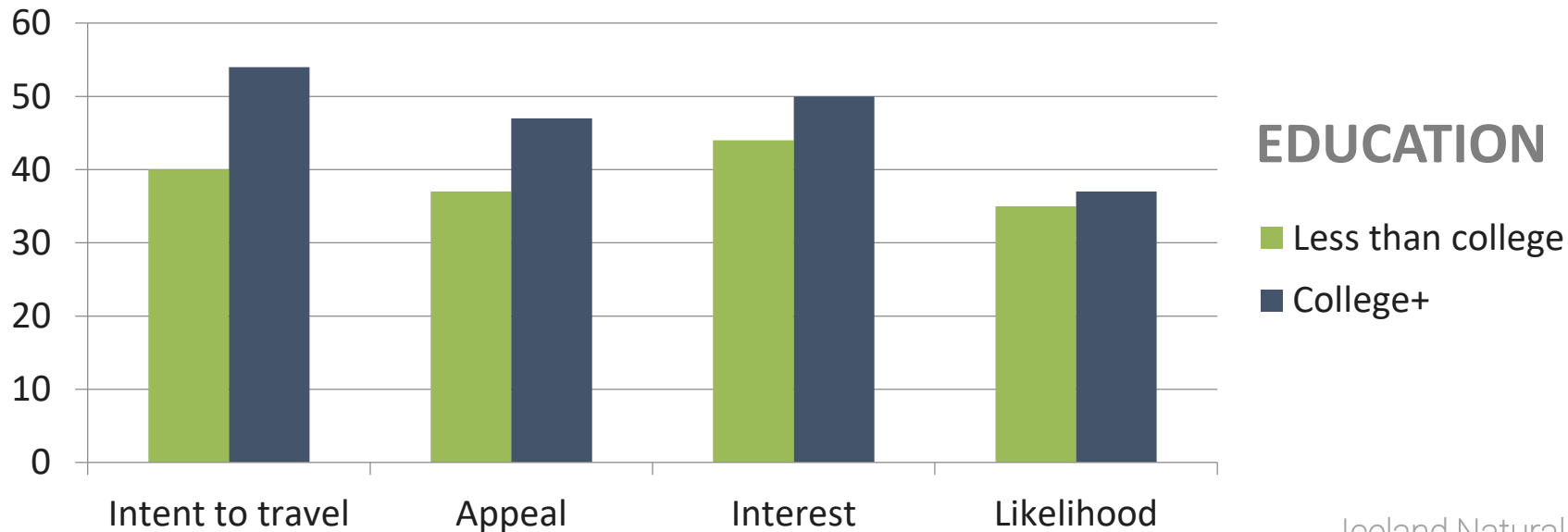
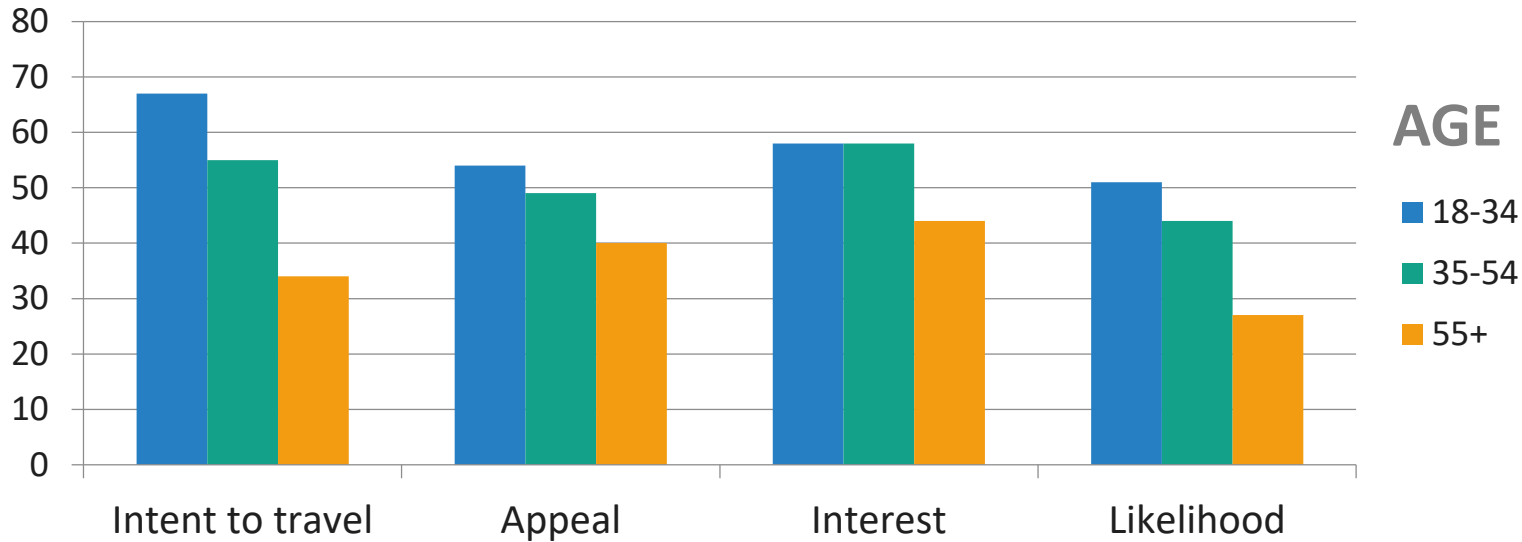
Travel attitudes demonstrate a consistent **UPWARD TRAJECTORY**

Demographic Correlations

Interest in Iceland is correlated with age, education, income, regions, frequent travel, city vacation preference, and the Outdoor Type.



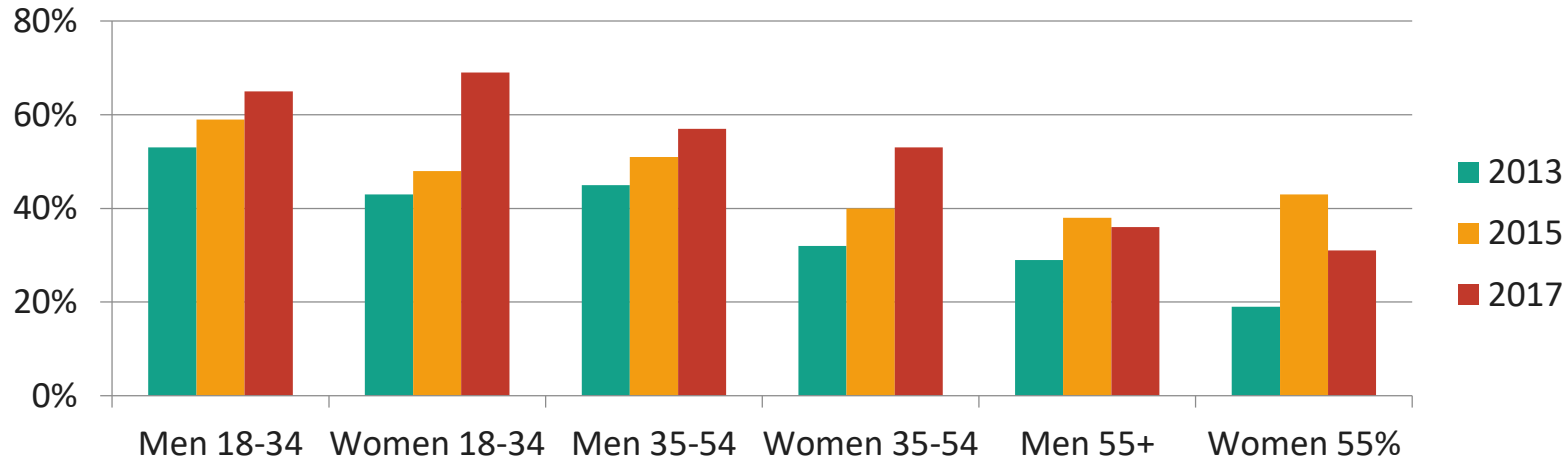
Demographic Variations



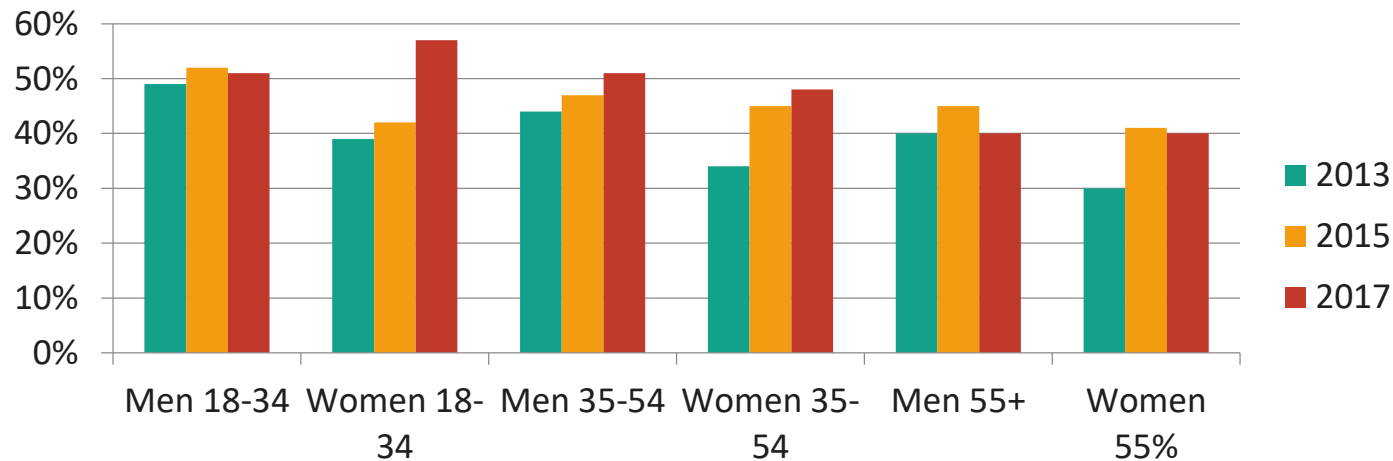
Attitudes
towards travel
to Iceland are
correlated
with **AGE** and
EDUCATION.

Gender Variations

Intent to travel to Iceland, by Age and Gender

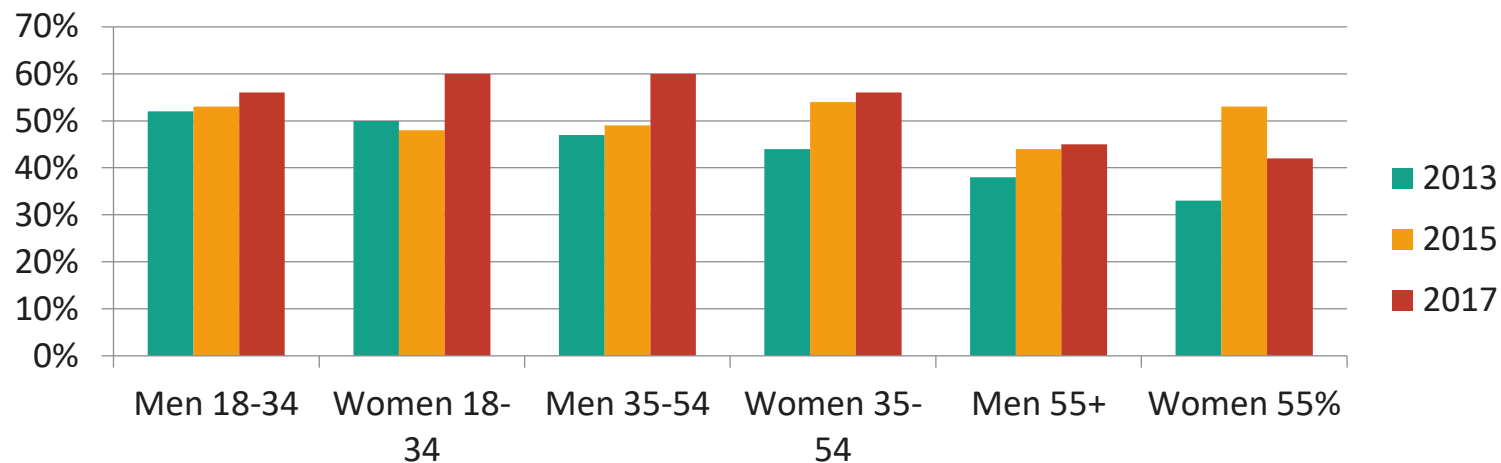


Appeal of Iceland, by Age and Gender

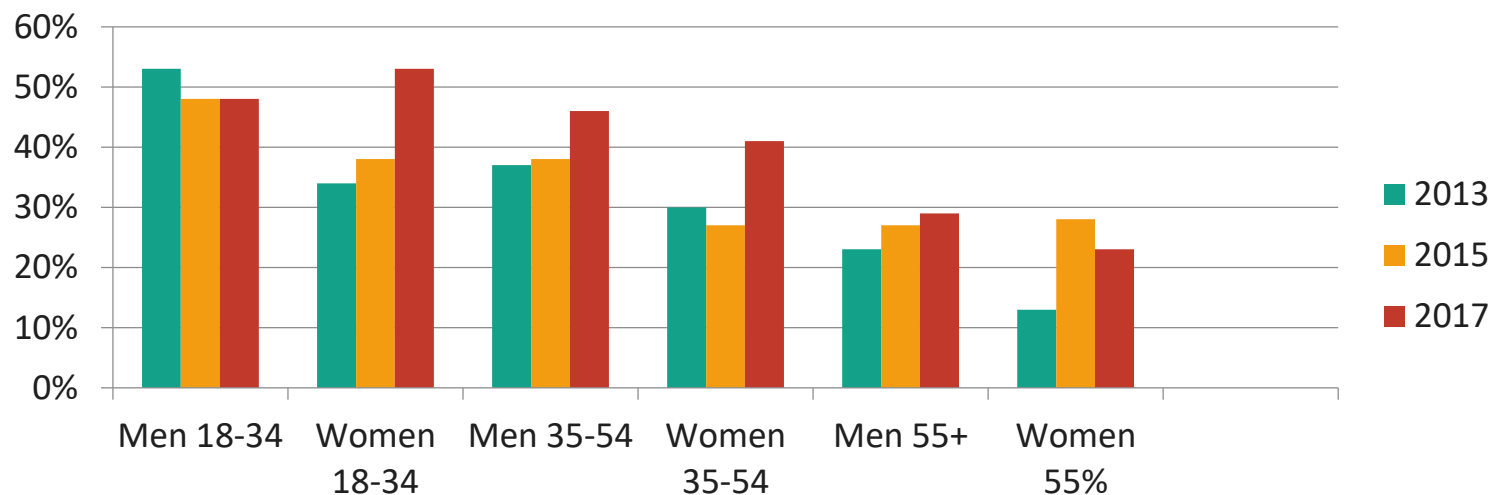


The **GENDER** gap in Canada is closing. There are no gender differences in travel attitudes.

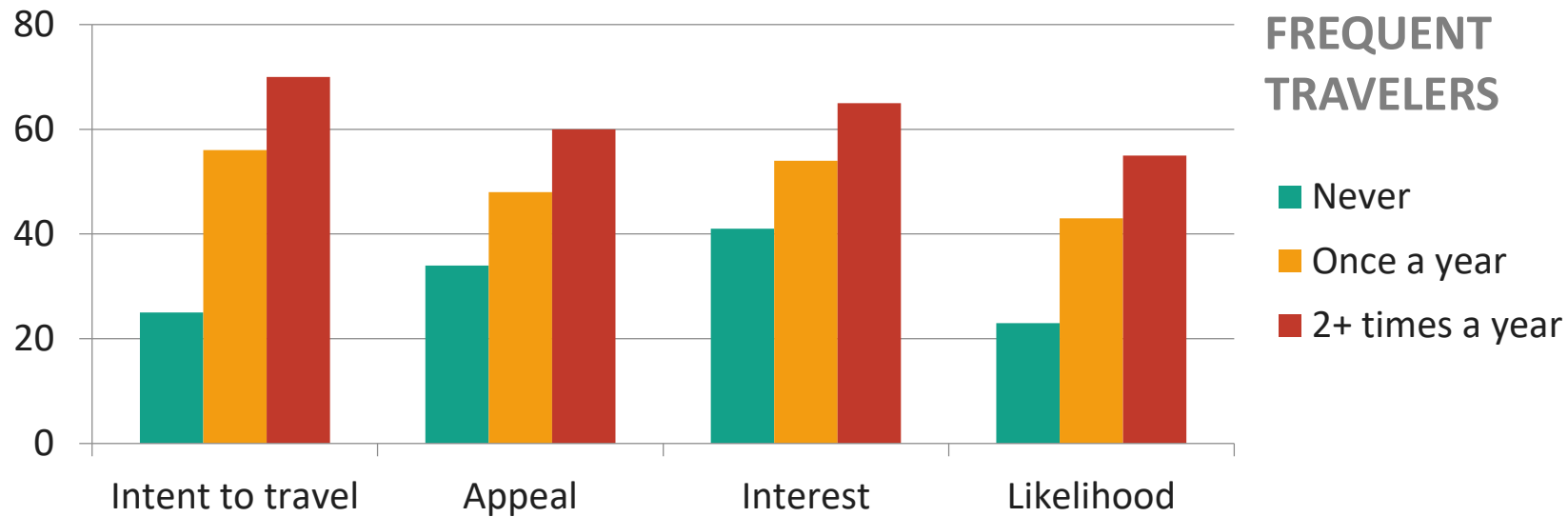
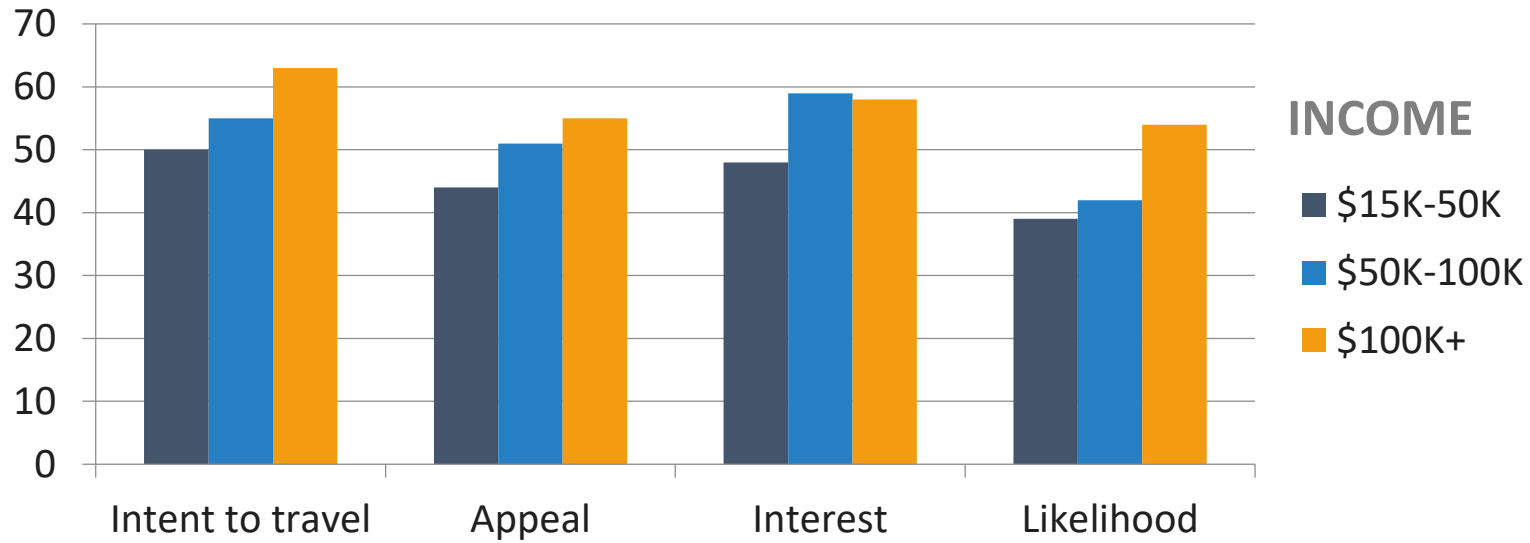
Interest in Iceland, by Age and Gender



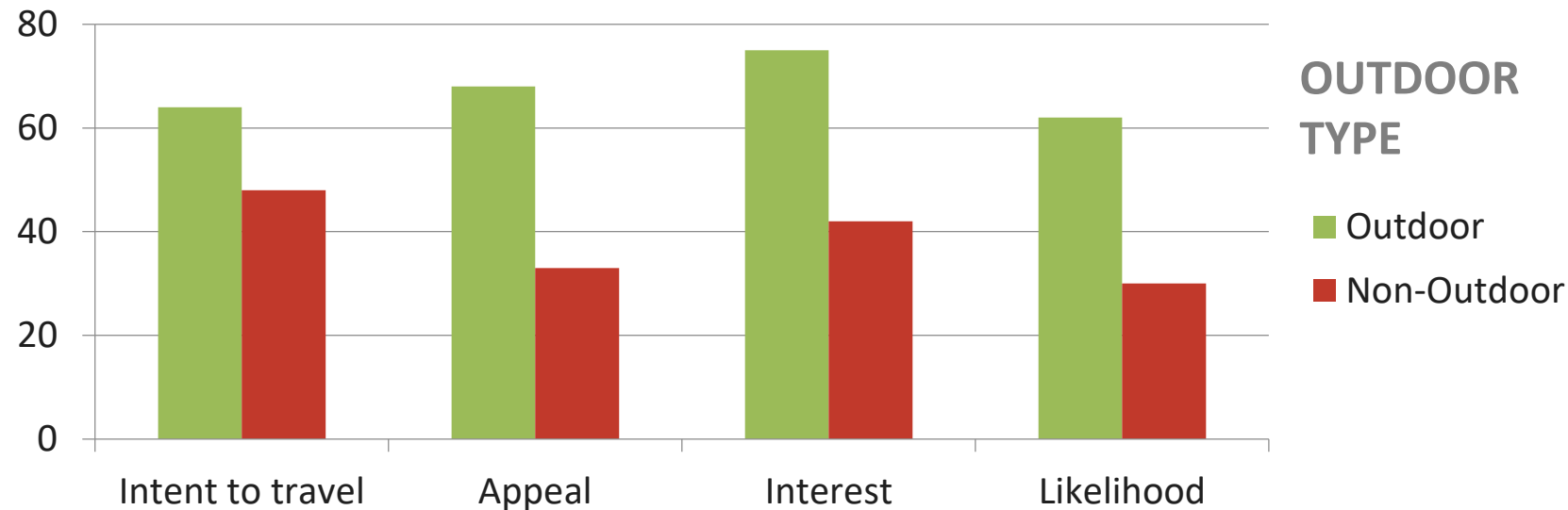
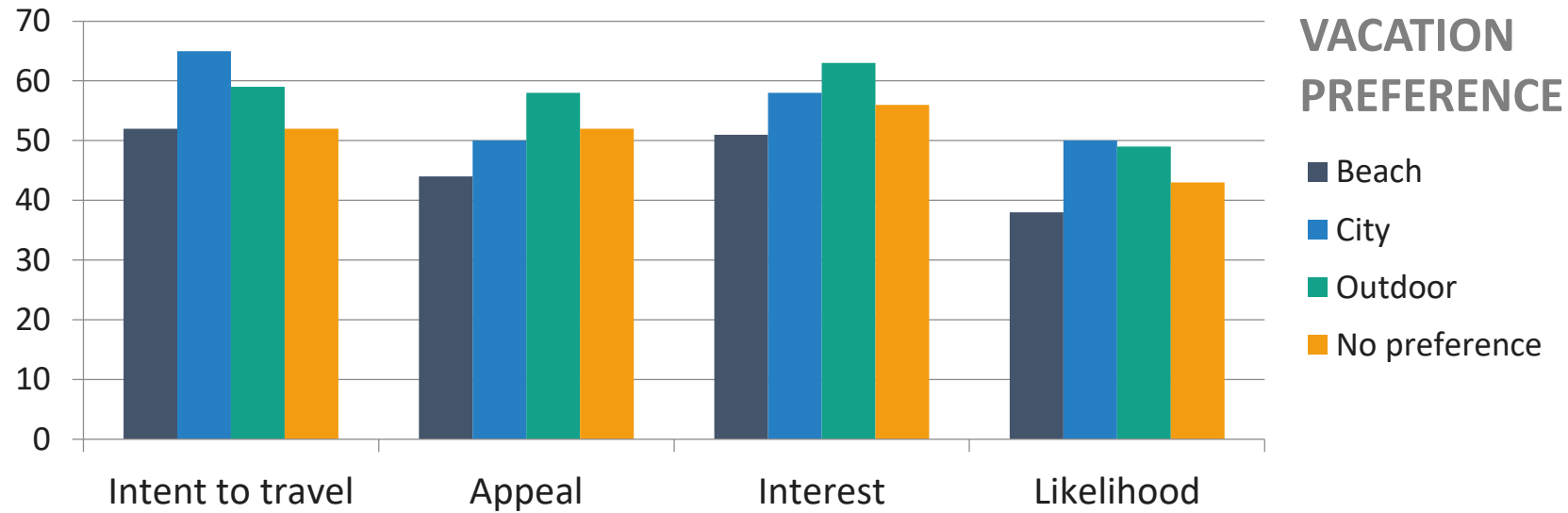
Likelihood of Travel, by Age and Gender



The greatest gains in positive travel attitudes are among **WOMEN** aged 18-54

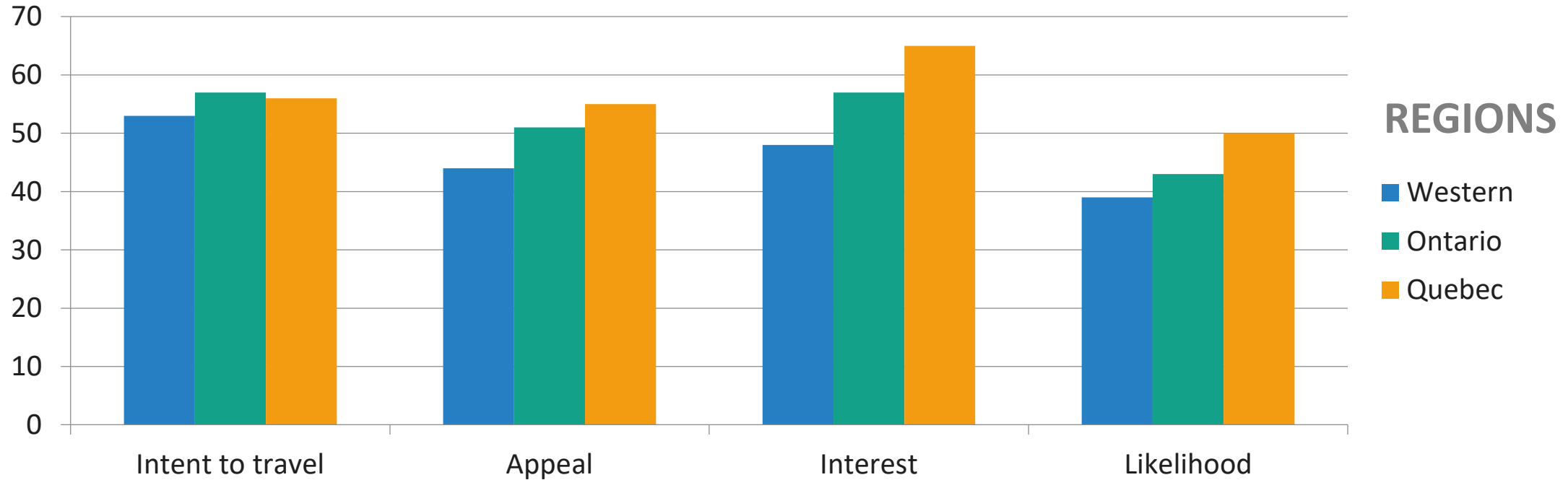


Consumers with higher household **INCOME** and **FREQUENT TRAVELERS** overseas demonstrate higher interest in Iceland as a travel destination



**CITY
VACATIONERS
and OUTDOOR
TYPE** demonstrate
higher interest in
Iceland as a travel
destination than
other consumers

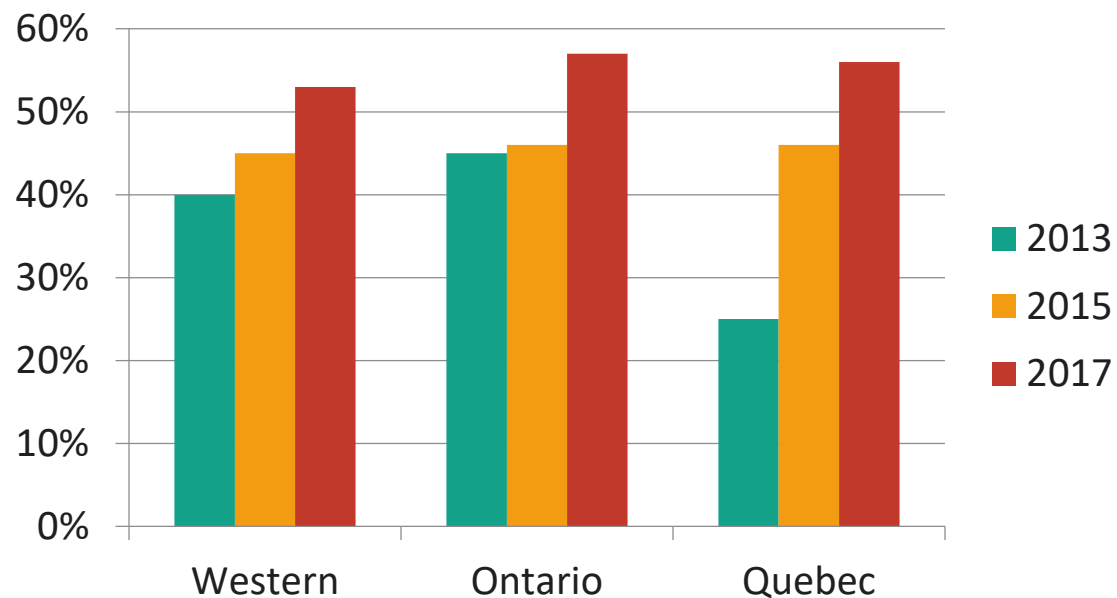
Regional Variations



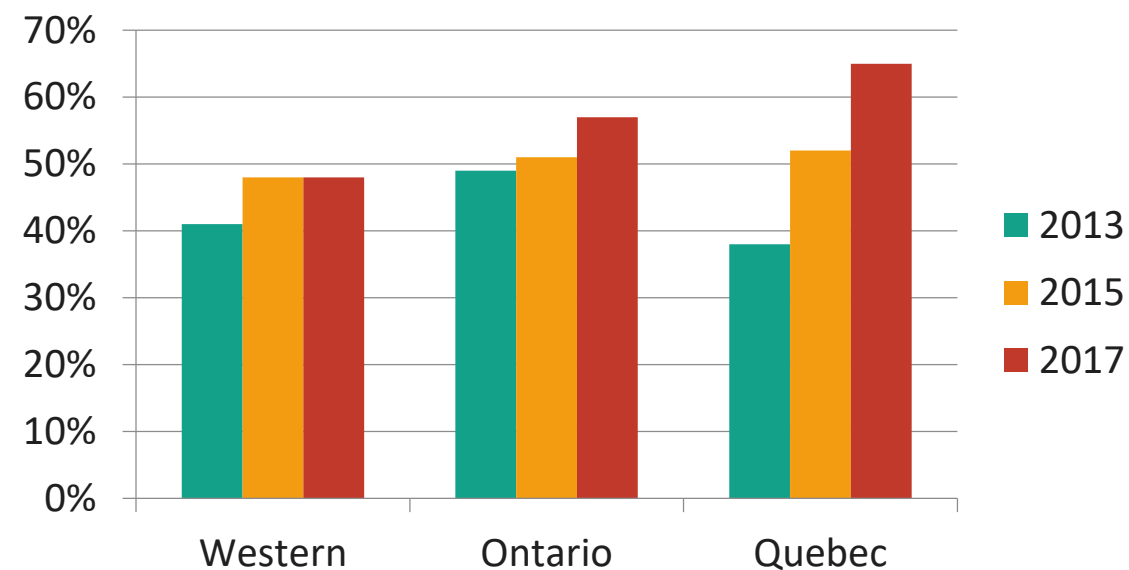
Interest in Iceland as a travel destination is higher among **QUEBEC** and **ONTARIO** consumers

Regional Variations

Intent to travel, by regions



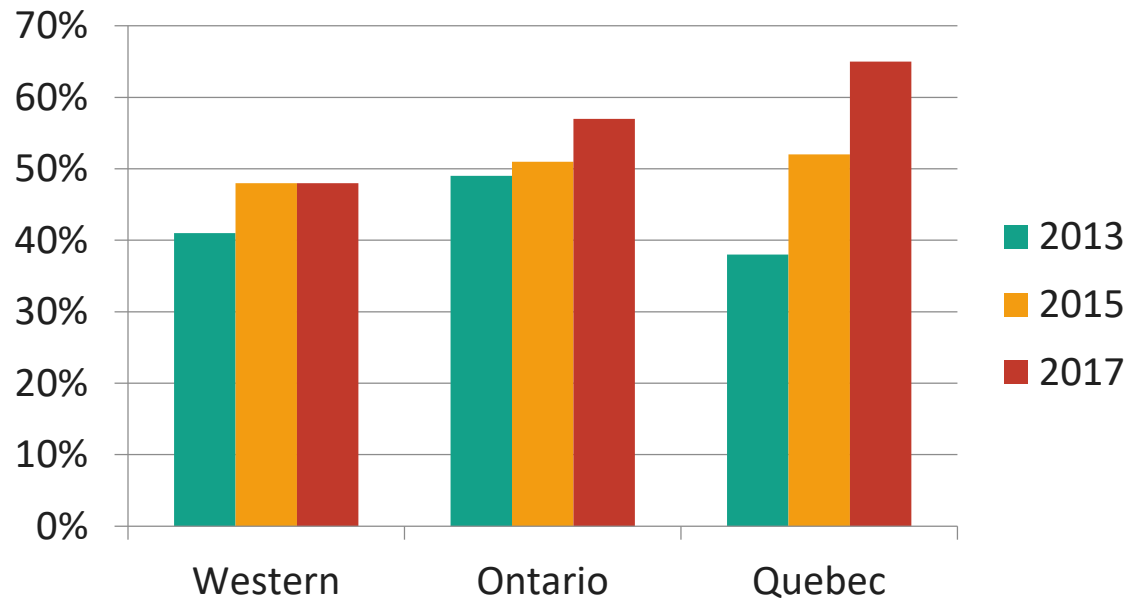
Appeal of Iceland, by regions



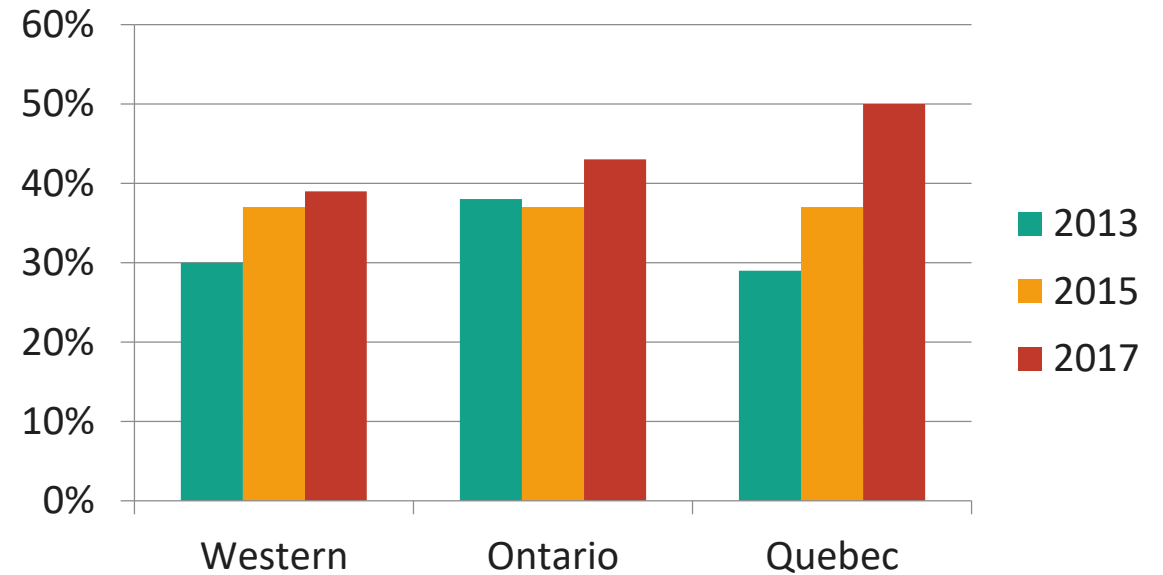
Gains in positive travel attitudes are most pronounced among **QUEBEC** consumers

Regional Variations

Interest in Iceland, by regions



Likelihood of travel, by regions



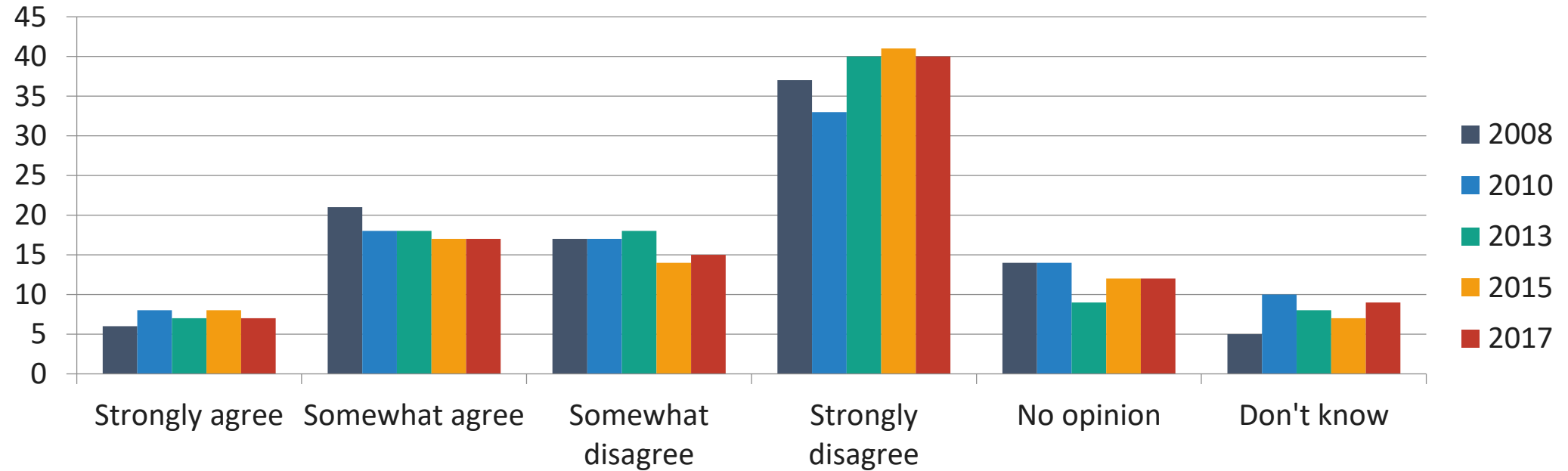
Gains in positive travel attitudes are most pronounced among **QUEBEC** consumers

Whale Harvesting



Attitudes towards Whale Harvesting

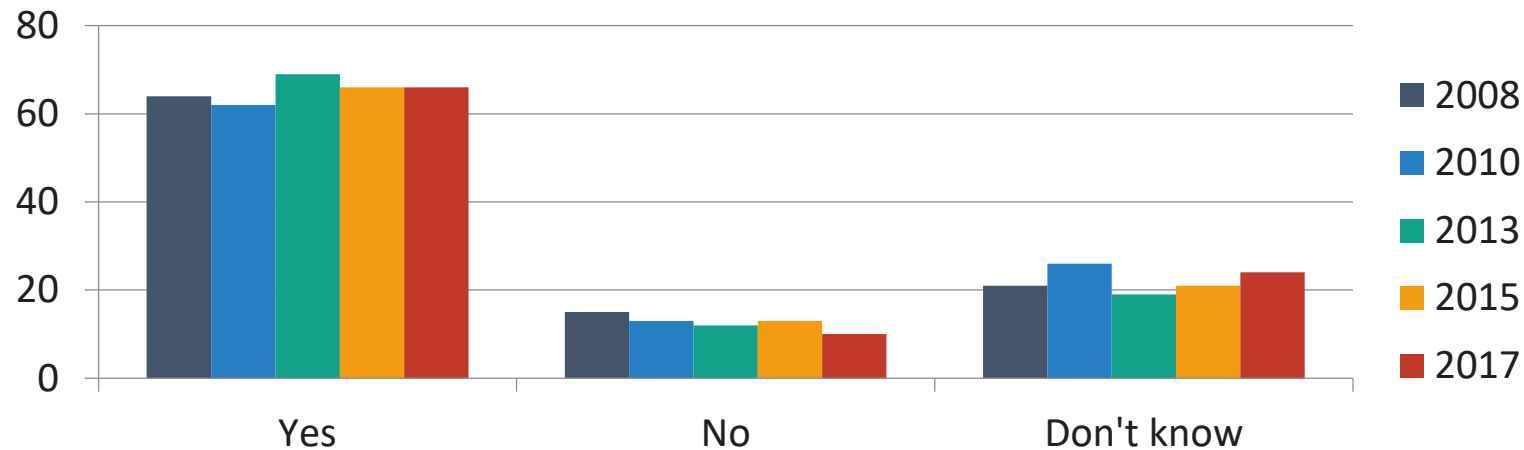
Do you agree that responsible harvesting of whales should be permitted? (%)



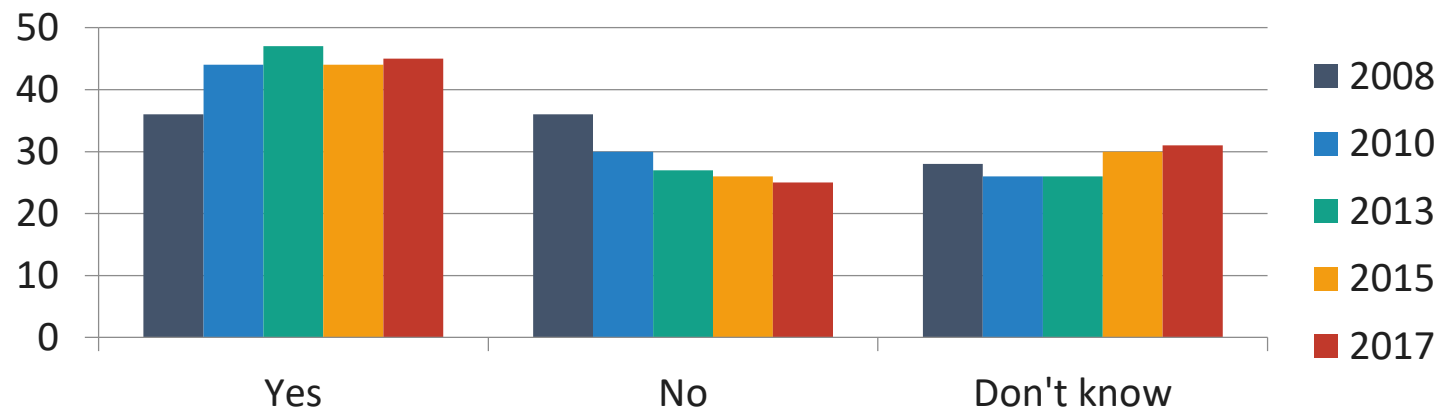
Attitudes towards whale harvesting remained stable over the years.

56% disagree that it should be permitted.

Do you believe that most species of whales are endangered? (%)



Would you boycott products from a whale-hunting country? (%)



66% of Canadian consumers believe that whales are endangered and **45%** said they would boycott products from a whale-hunting country. There were no significant shifts in attitudes.