



# Iceland Naturally

2018 consumer research in the U.S.

June 2018 | Portland, OR



# Objectives and Methodology

Tracking consumer attitudes since 1999



Iceland Naturally has tracked consumer attitudes towards travel to Iceland and Icelandic products in the U.S. since 1999.

The study was conducted online among a nationally representative sample of 1,127 U.S. consumers aged 18 to 70.

The survey was conducted in May 2018.

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

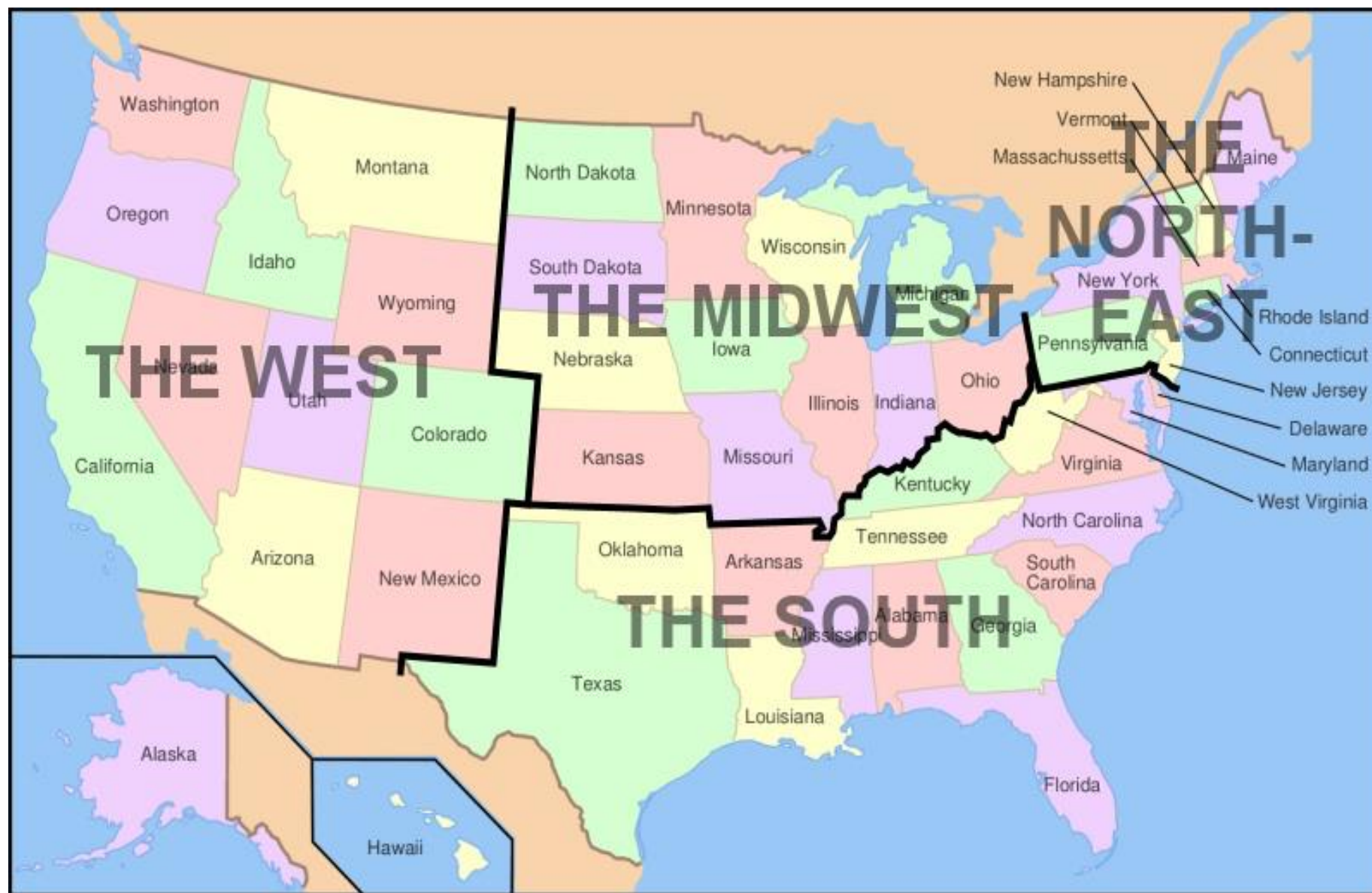
The sample was weighted to reflect the demographic profile of the U.S. consumers based on the Census data.

Northeast: 17%

Midwest: 21%

South: 38%

West: 24%



# Consumer Segments

## The City Vacationer

**16%** Prefers city vacations



## Frequent Traveler

**19%** travels outside the U.S.  
2+ times a year



## The Outdoor Type

**12%** Prefers vacations  
in natural outdoor  
environments;  
destinations that offer  
great outdoor activities;  
destinations that have  
an unusual landscape





# Travel to Iceland



**Ice/cold**  
associations  
continue to  
slide: 38% in  
2018, down  
from 42% in  
2016

**"Other:"**

**9% - Green/warm**

**5% - Positive remarks**

**2% - Volcanoes**

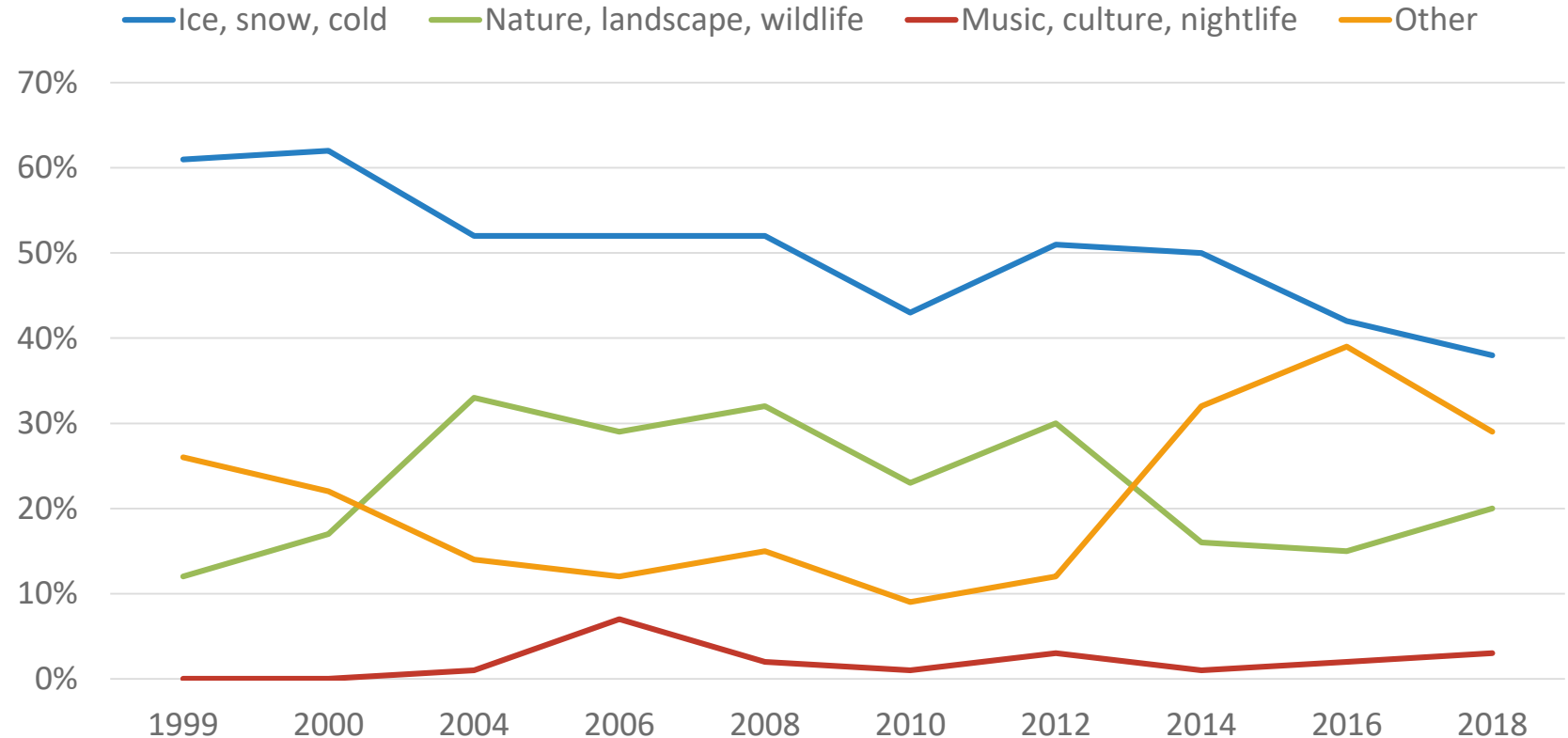
**3% - Fish, seafood, whales**

**11% - other**

**9% - not answer**

# Top-of-mind Associations with Iceland

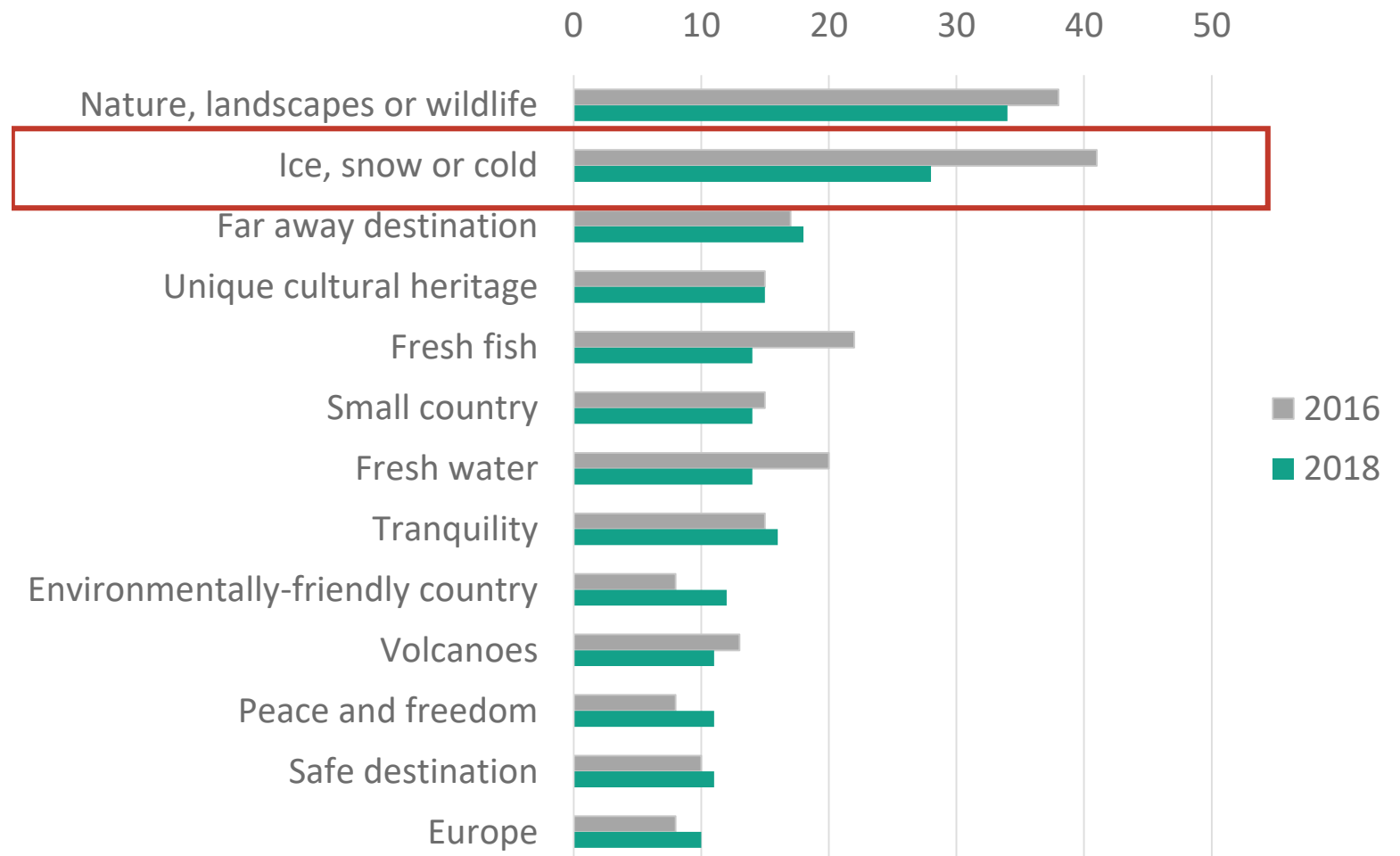
What is the first thing that comes to mind when you think of Iceland?  
(open-end)



Associations  
with **ICE**,  
**SNOW** and  
**COLD** have  
dropped from  
41% in 2016  
to **28%** in  
2018.

# Top-of-mind Associations with Iceland

What is the first thing that comes to mind when you think of Iceland?  
(% top 3 choices, close-ended)





# Associations with Iceland in Consumers' Words

Natural resources and a clean environment.

Geysers geological activity life

Cool weather and green pastures with high cliffs.

Very and extremely cold weather in a tiny little country.

I think about how cold it is there, but then I forget that it's sunny and warm there, and it's Greenland that isn't.

Knowing that the name is a falsehood and it's actually rather verdant, the opposite of Greenland. Also volcanoes!

Wonderful people and history

That the language is one of the hardest languages in the world to learn for foreigners.

A different country and place to visit

Someone told me that the water there is unlike any other. I think of cold weather, darkness, and water. Probably also whales. I am also honestly not sure if this is the country that teens drink too much because they are depressed with all the darkness or whether it was another country.

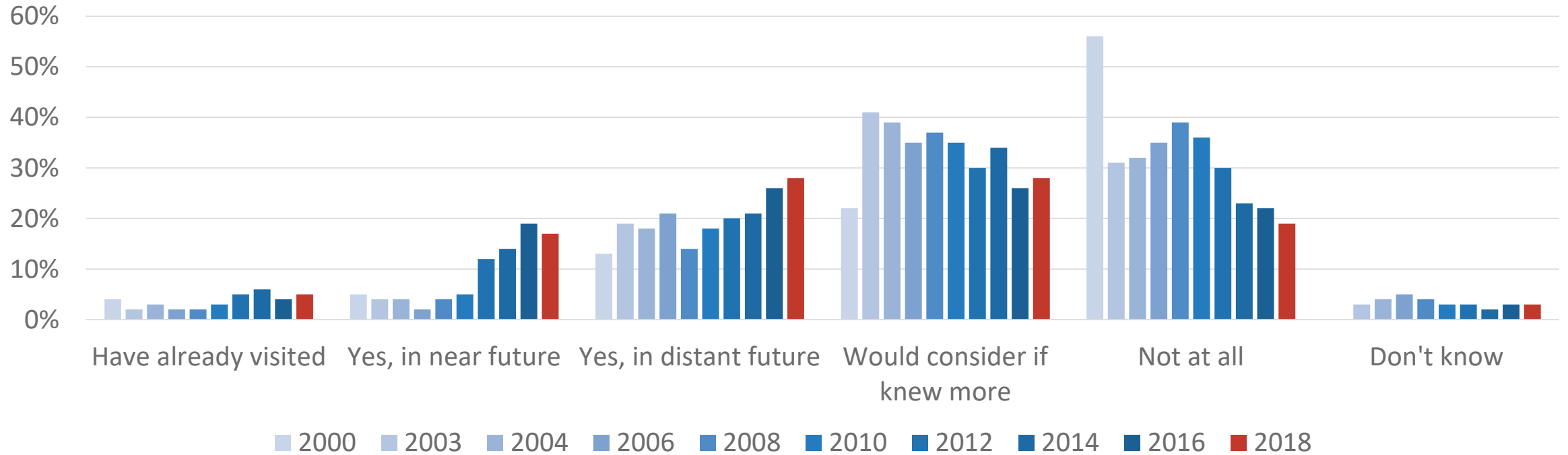
The Blue Lagoon

Beaches with mud that's good for skin



# Intent to Travel to Iceland

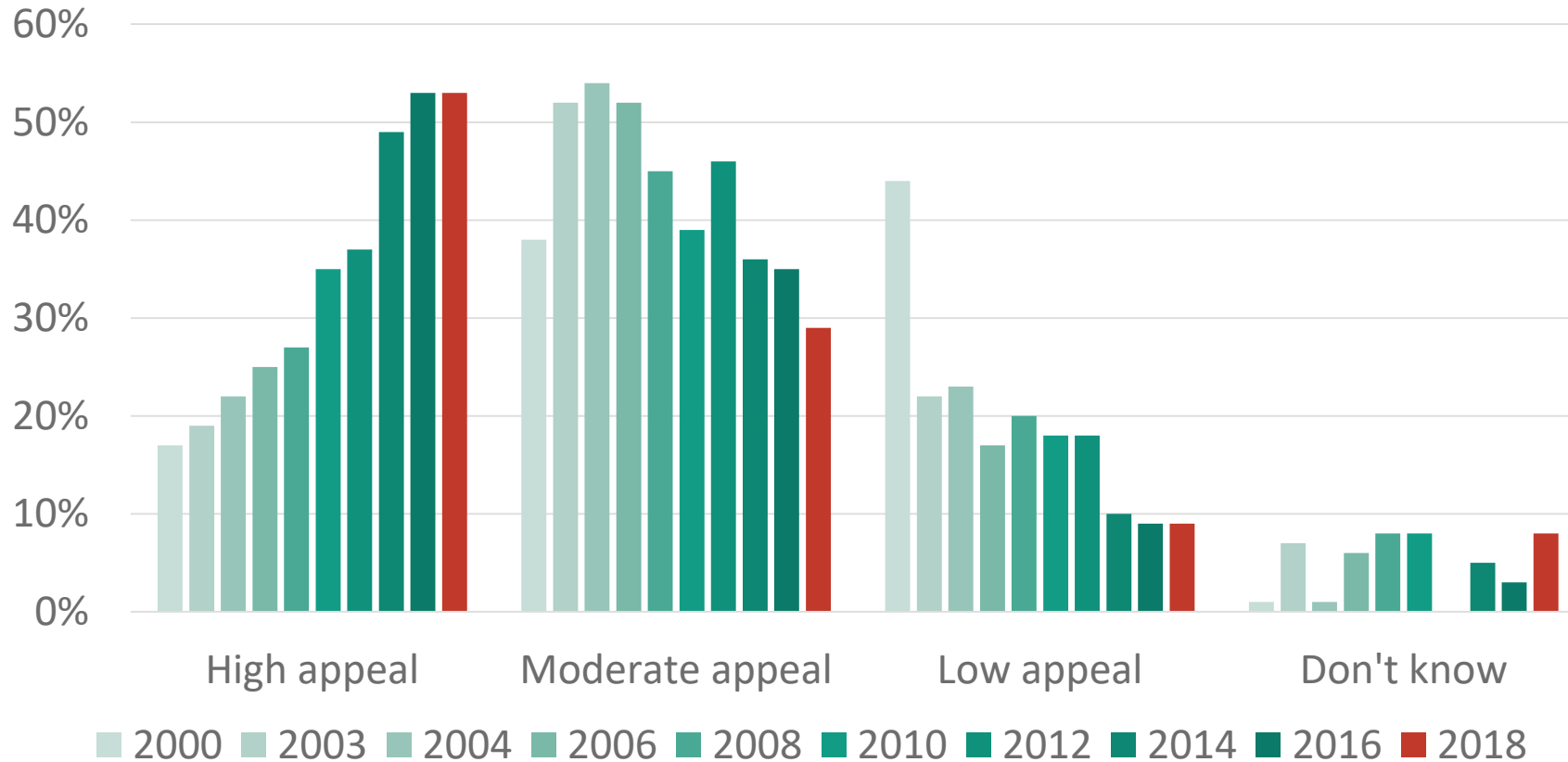
Have you ever considered visiting Iceland?



One in two U.S. consumers (50%) express an intent to travel to Iceland.

# Appeal of Iceland

How appealing is Iceland as a travel destination?



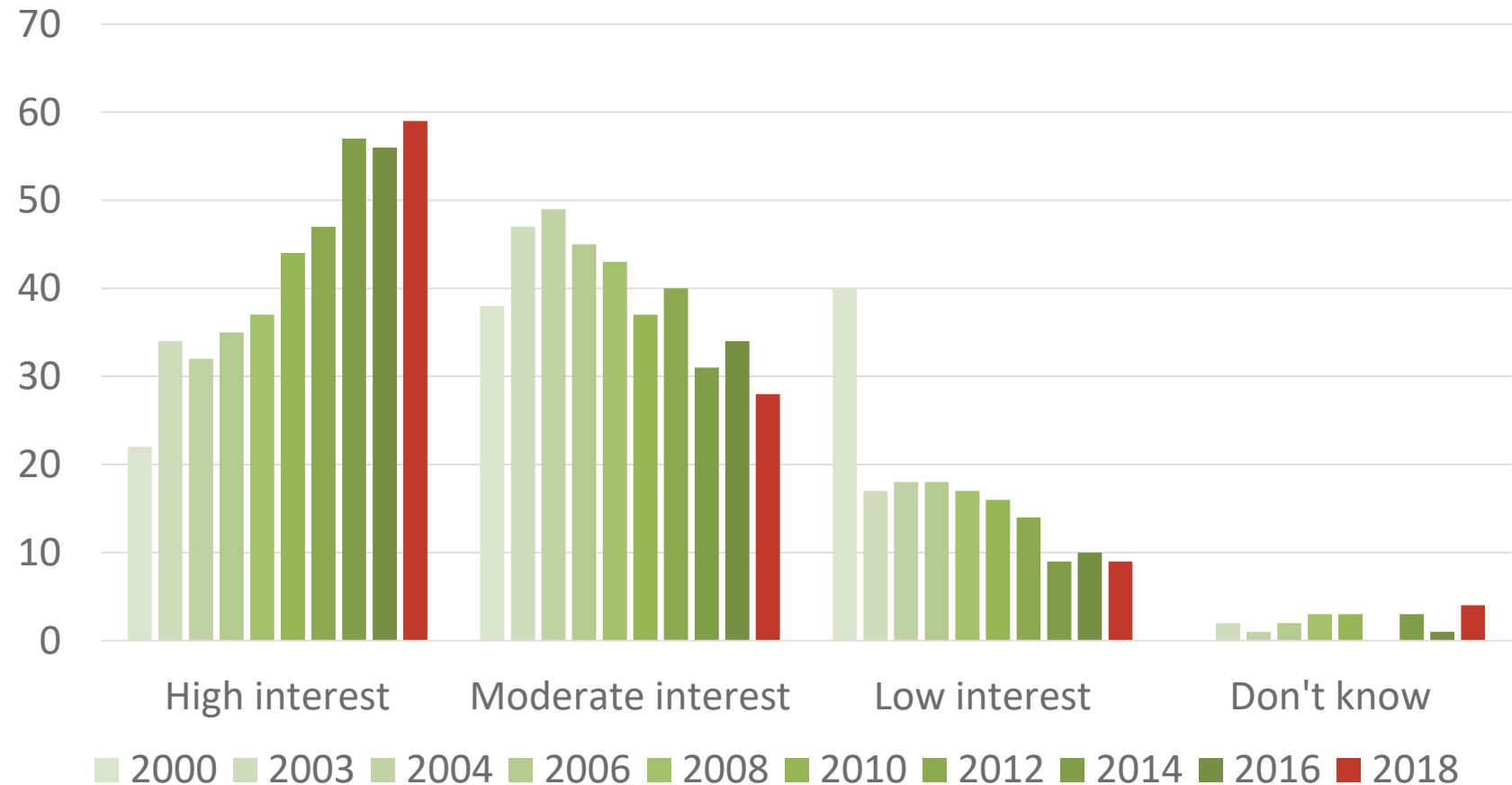
**HALF** of US consumers (53%) find Iceland a **HIGHLY APPEALING** travel destination



**59%** of US consumers are **HIGHLY INTERESTED** in learning more about Iceland

## Interest in Iceland

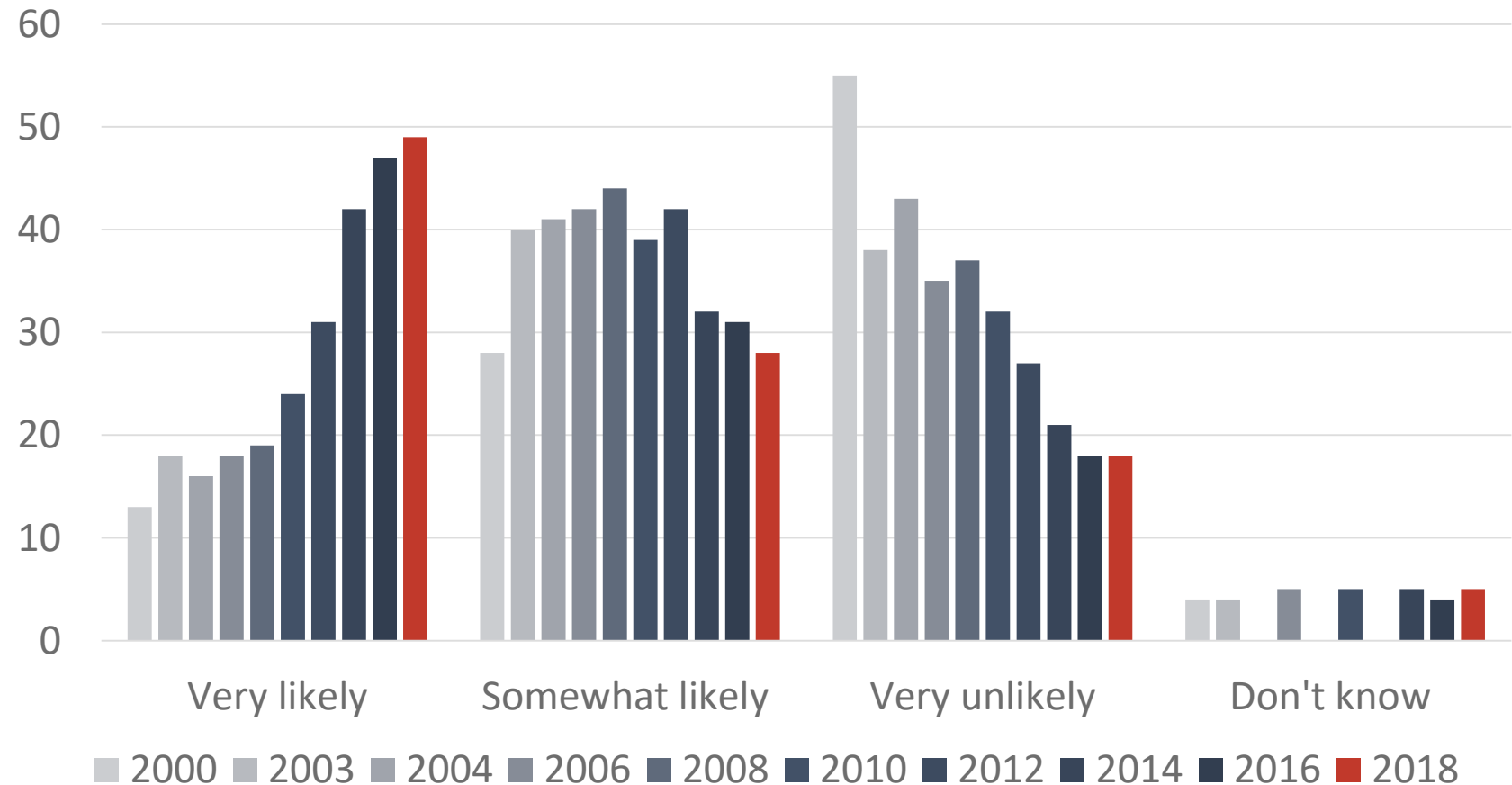
How interested are you in learning more about Iceland?



**Likelihood**  
of travel  
remained at the  
same level as in  
2016: **49%** say  
they are very  
likely to travel  
to Iceland for  
pleasure

## Likelihood of Travel to Iceland

How likely are you to travel to Iceland for pleasure?

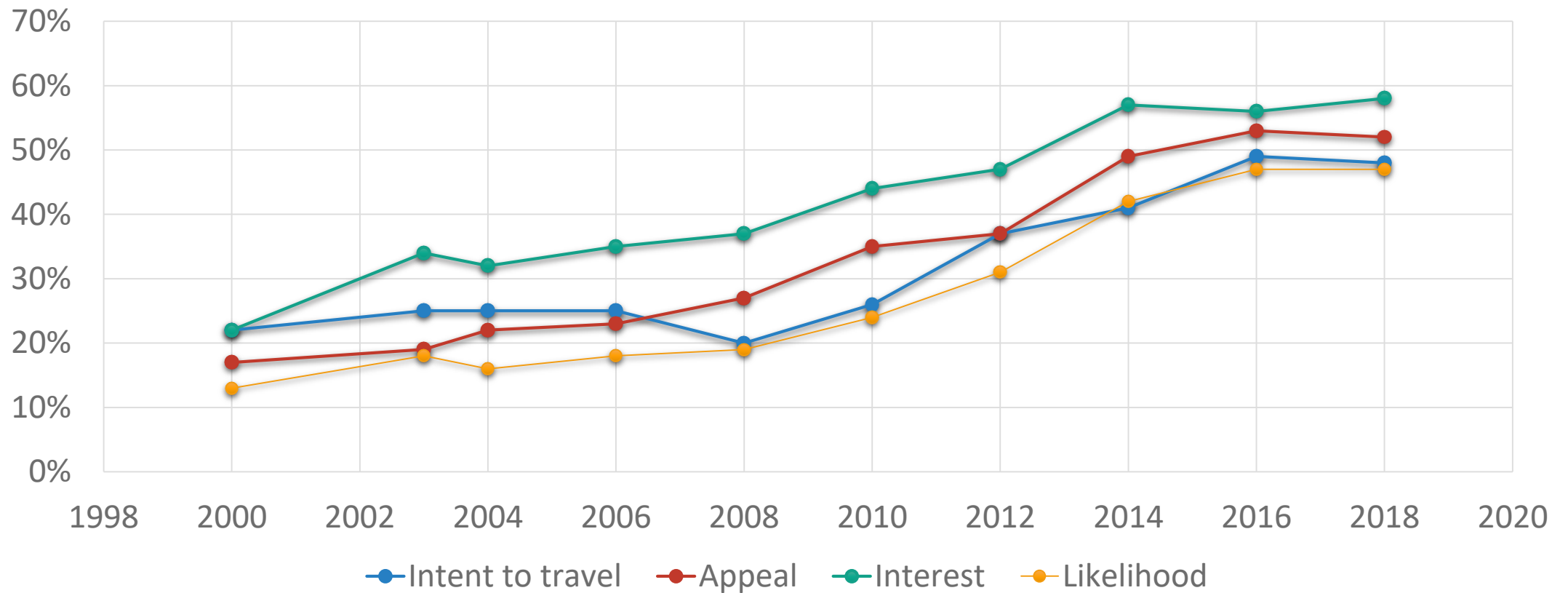




# Summary of Travel Attitudes



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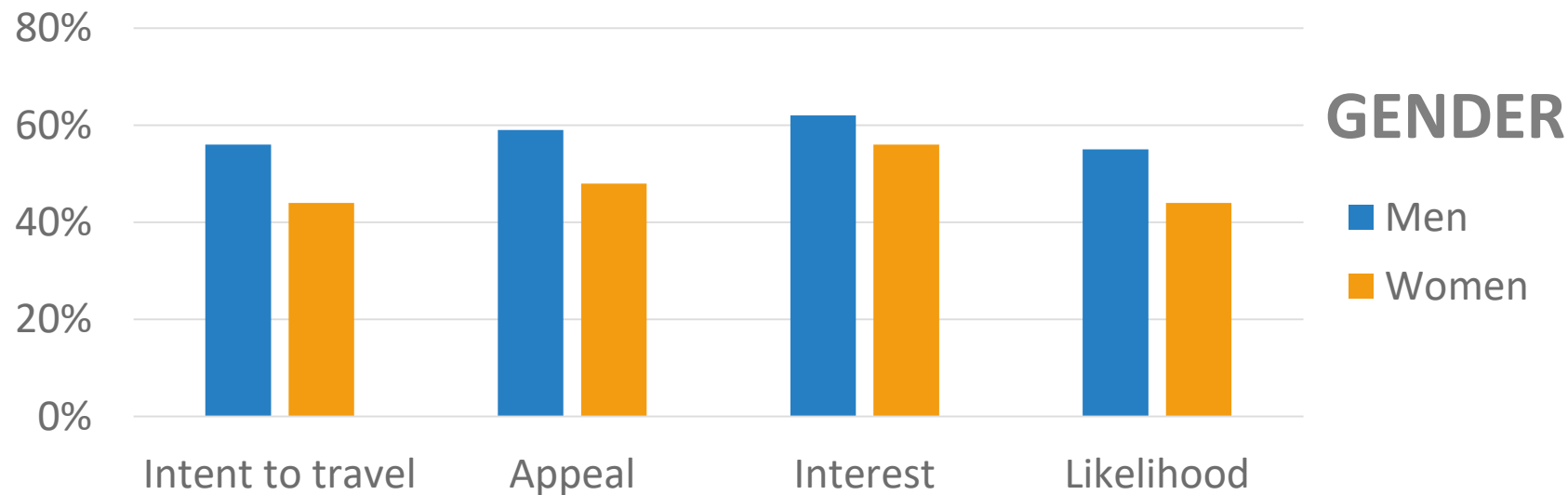
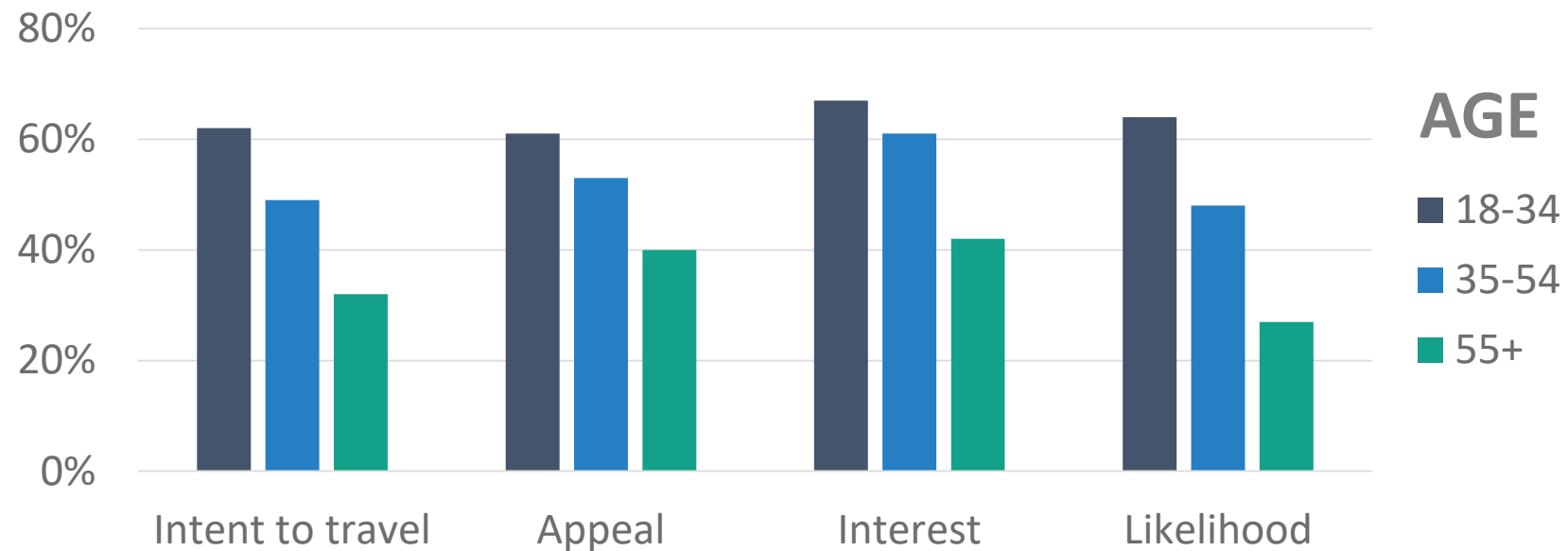
Travel attitudes demonstrate a consistent **UPWARD TRAJECTORY**



## Demographic Correlations

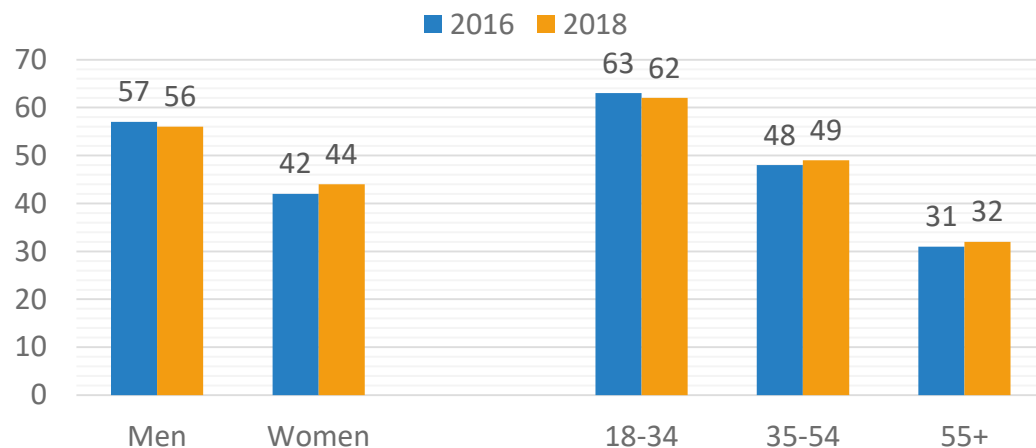
Interest in Iceland is correlated with age, education, income, regions, frequent travel, city vacation preference, and the Outdoor Type.



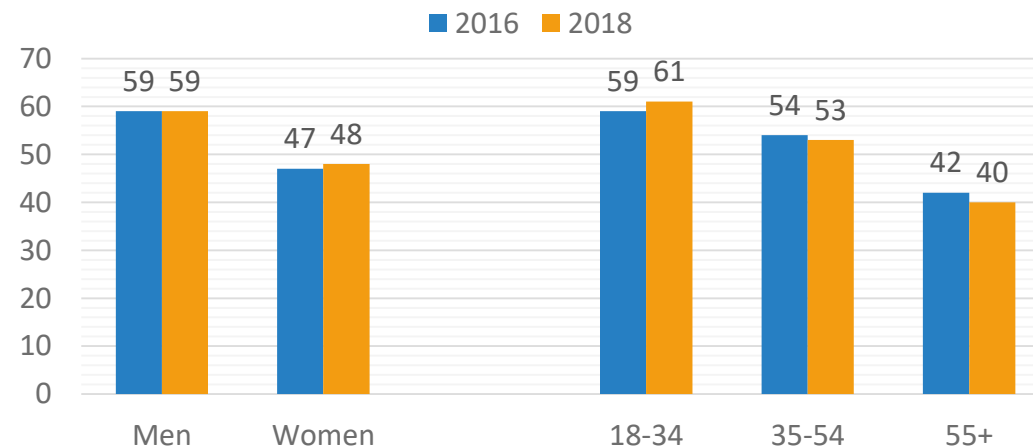


Attitudes  
towards travel  
to Iceland are  
correlated  
with **AGE** and  
**GENDER**

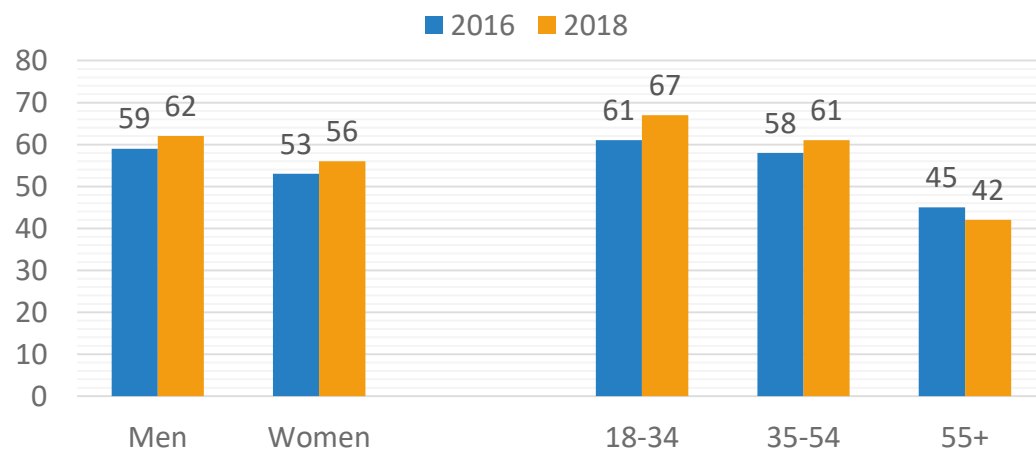
## Intent to Travel (% , have considered)



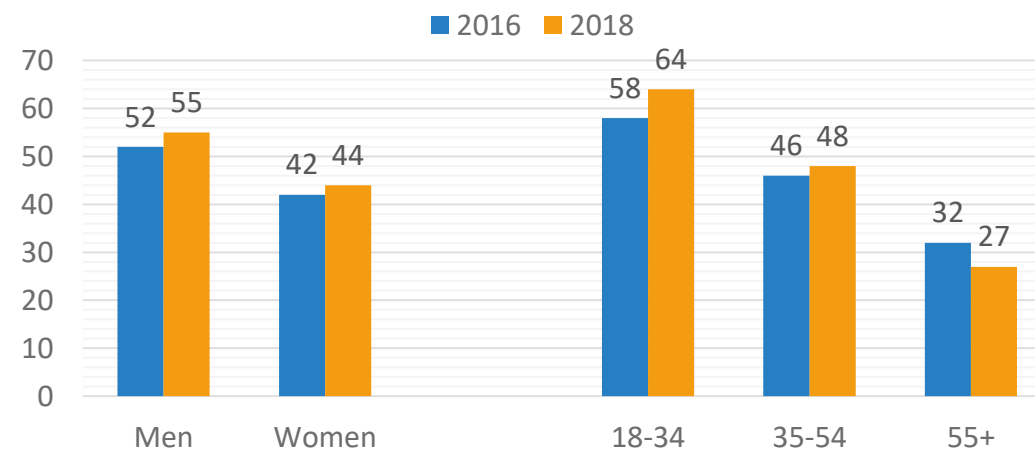
## Appeal (% , high appeal)



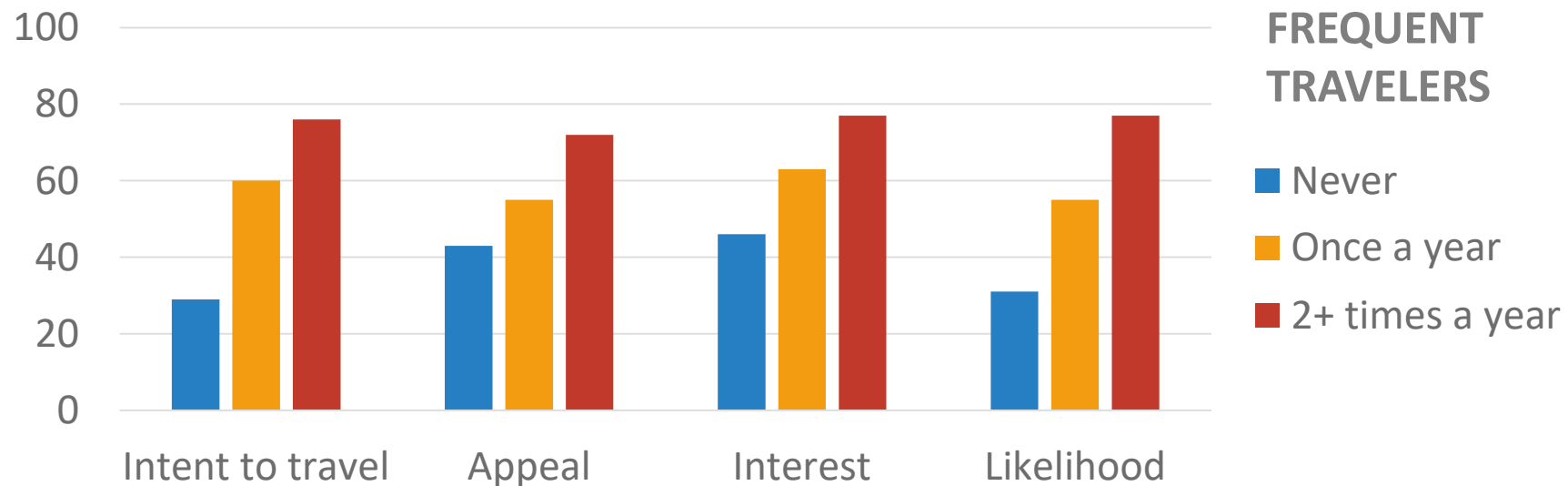
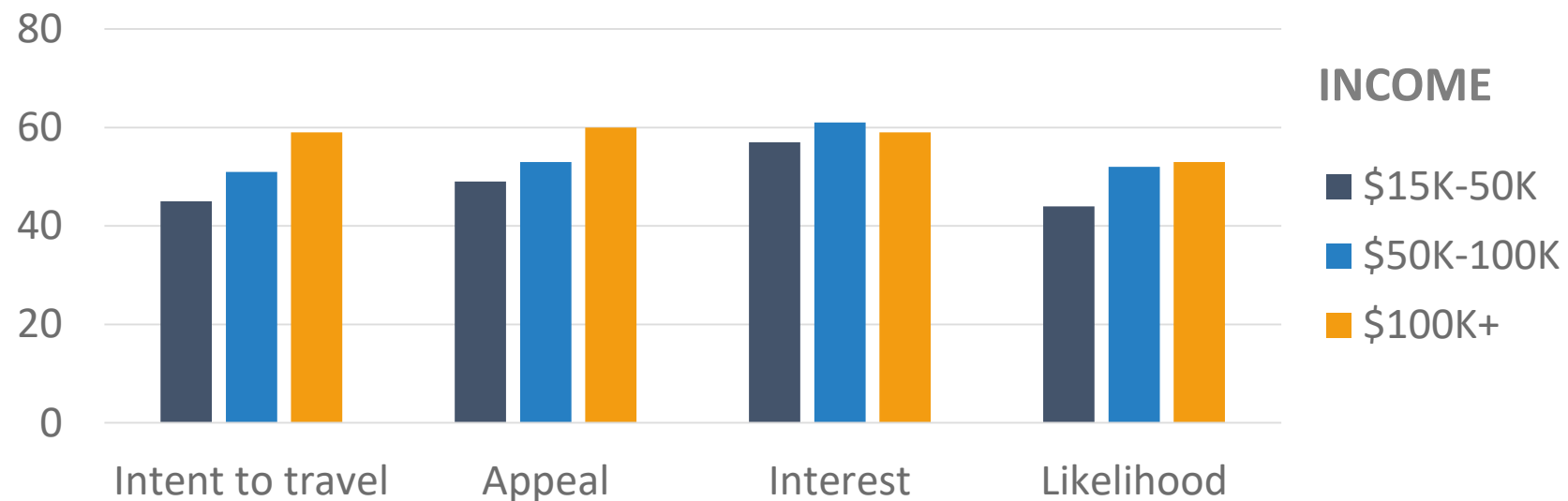
## Interest (% , high interest)



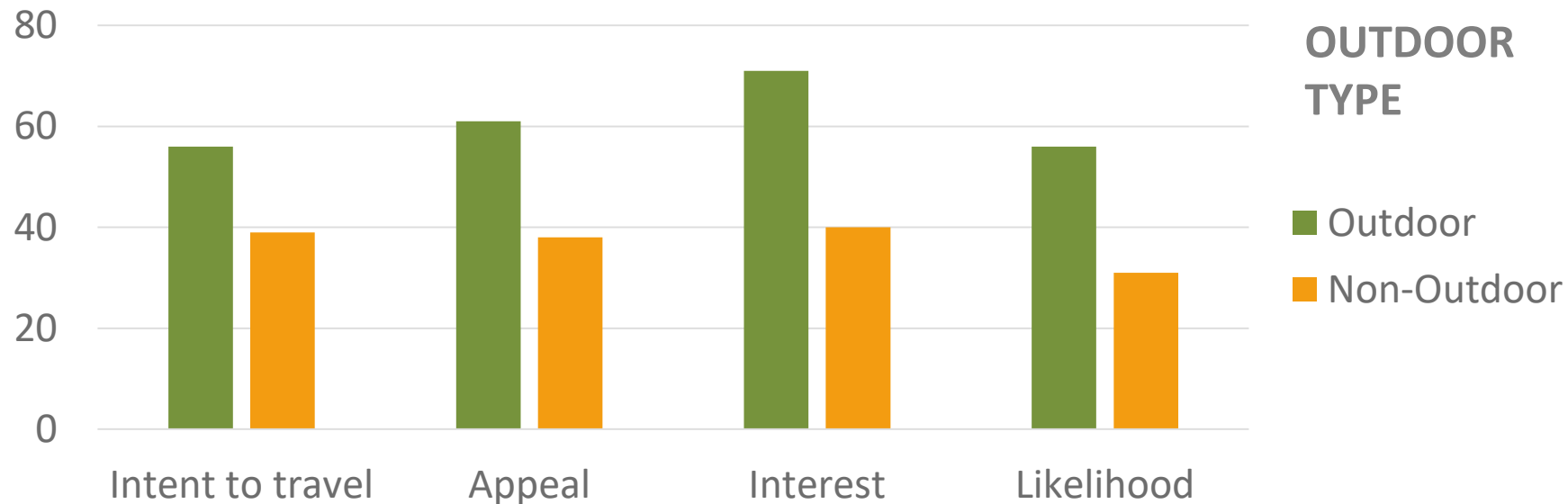
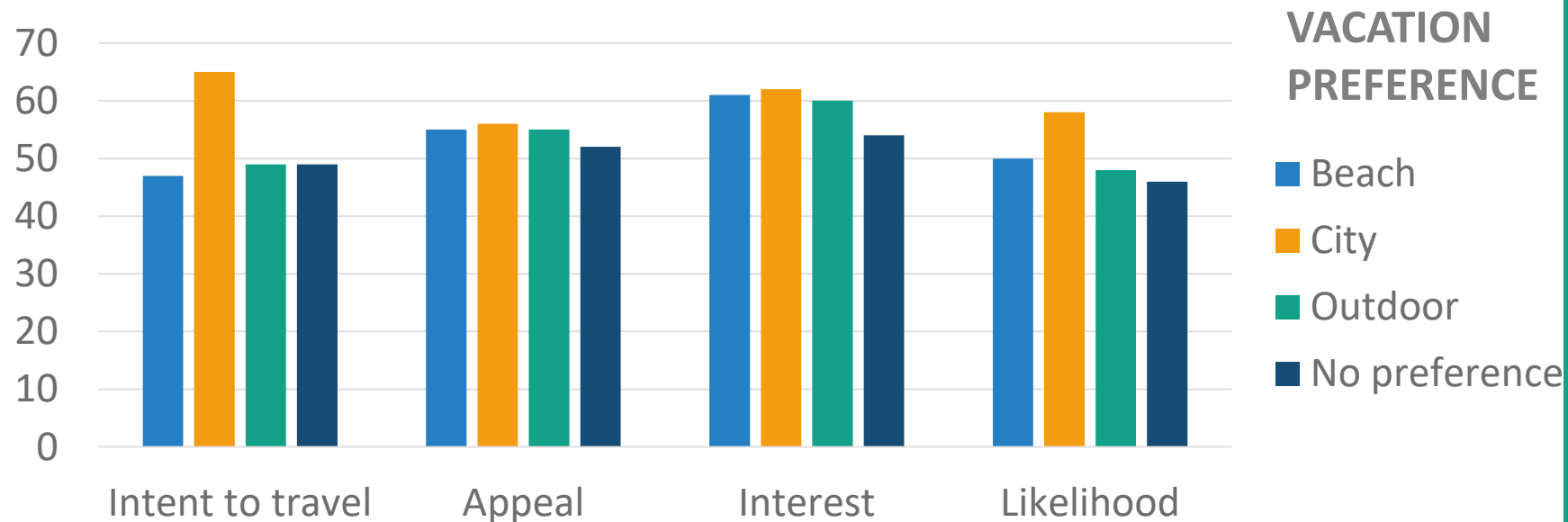
## Likelihood of Travel (% , high likelihood)





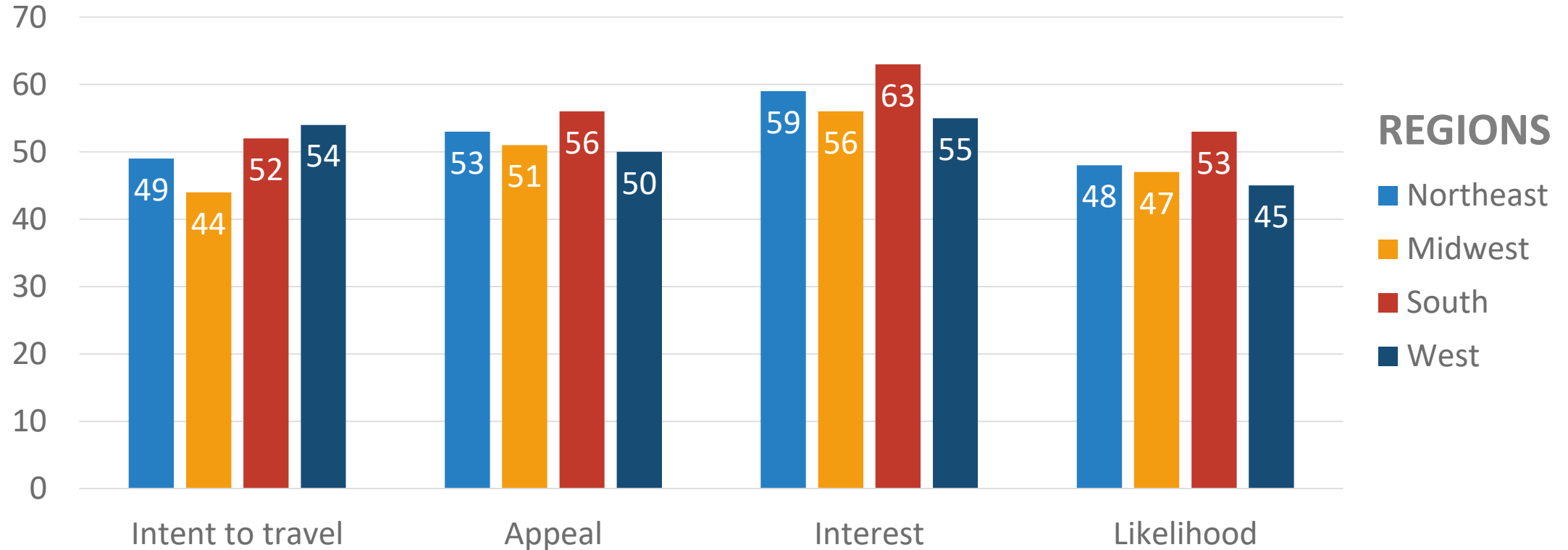


Consumers with higher household **INCOME** and **FREQUENT TRAVELERS** overseas demonstrate higher interest in Iceland as a travel destination



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

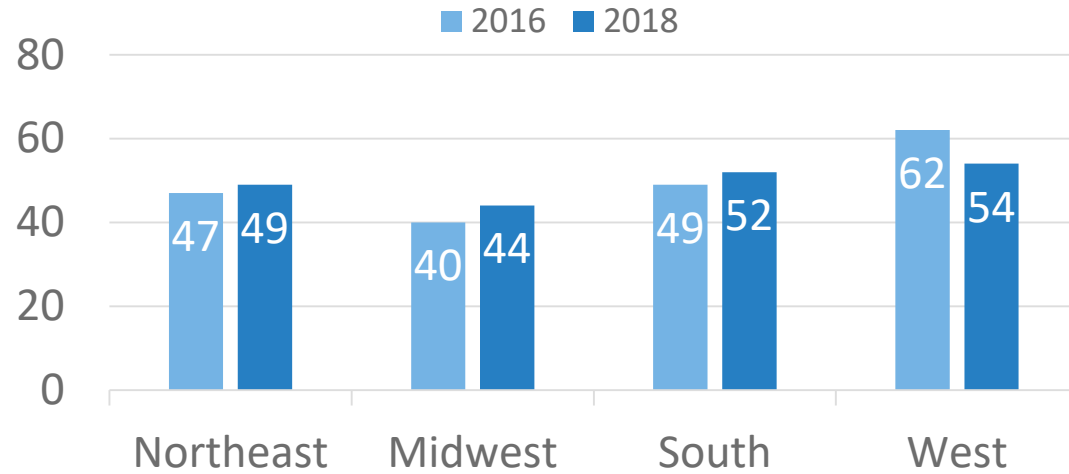
## Regional Variations



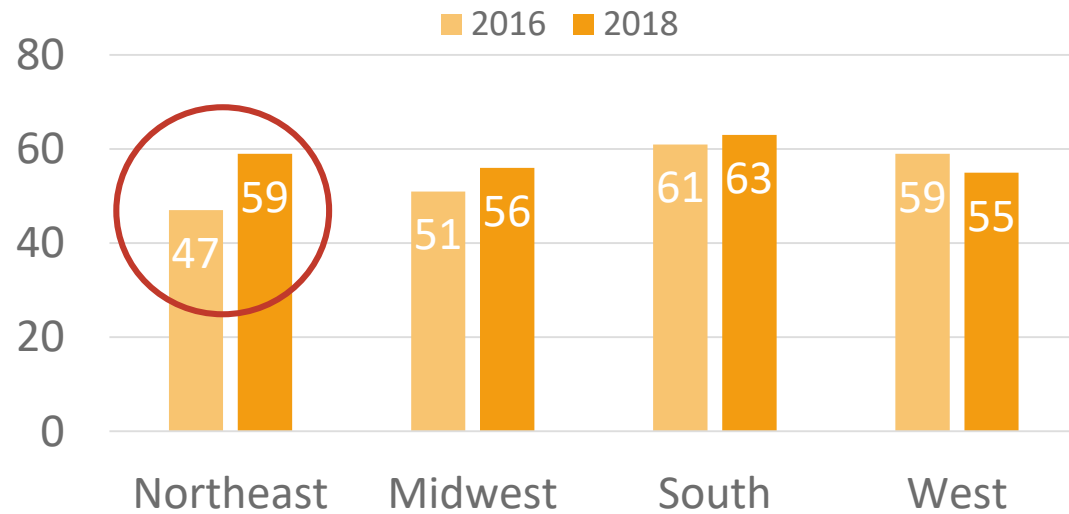
**There were no significant differences in appeal, interest and likelihood of travel to Iceland among different regions**



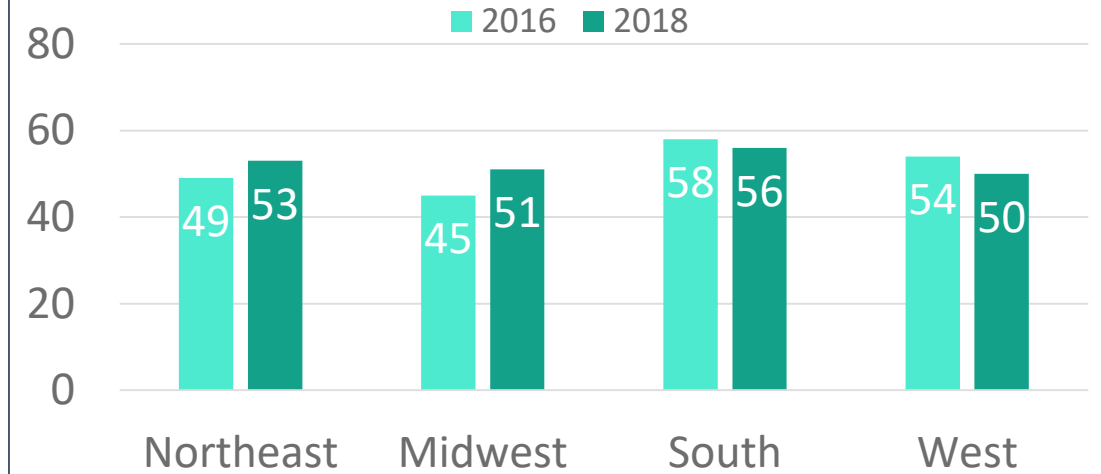
### Intent to Travel



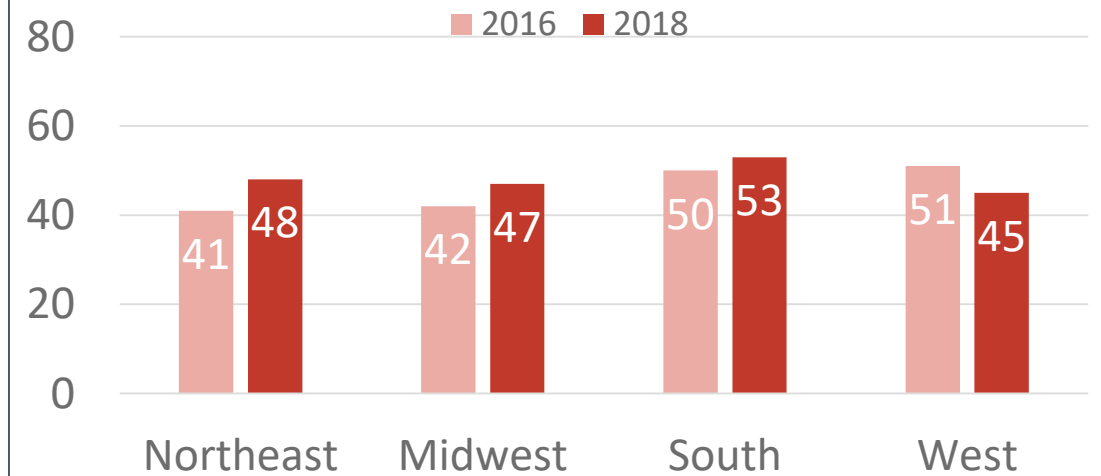
### Interest



### Appeal



### Likelihood of Travel

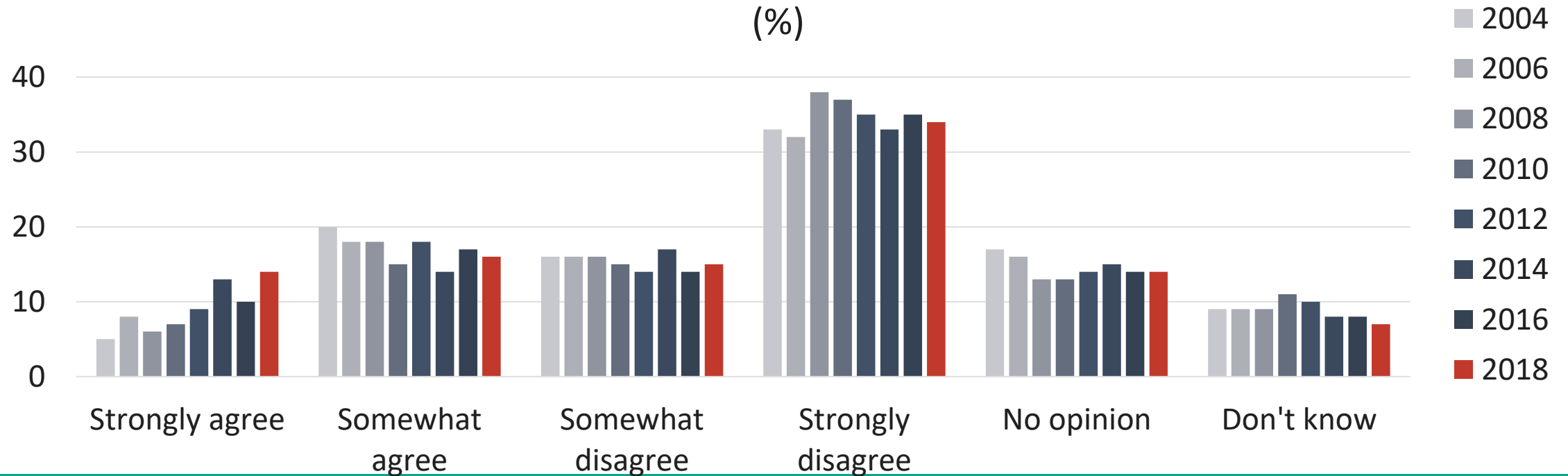


# Whale Harvesting



# Attitudes towards Whale Harvesting

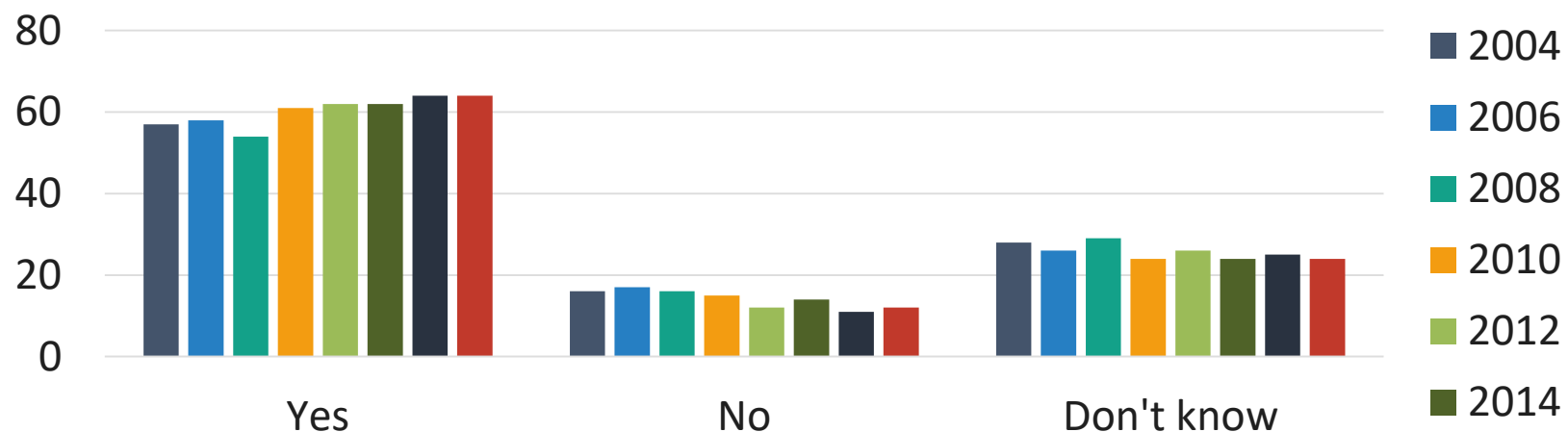
Do you agree that responsible harvesting of whales should be permitted?  
(%)



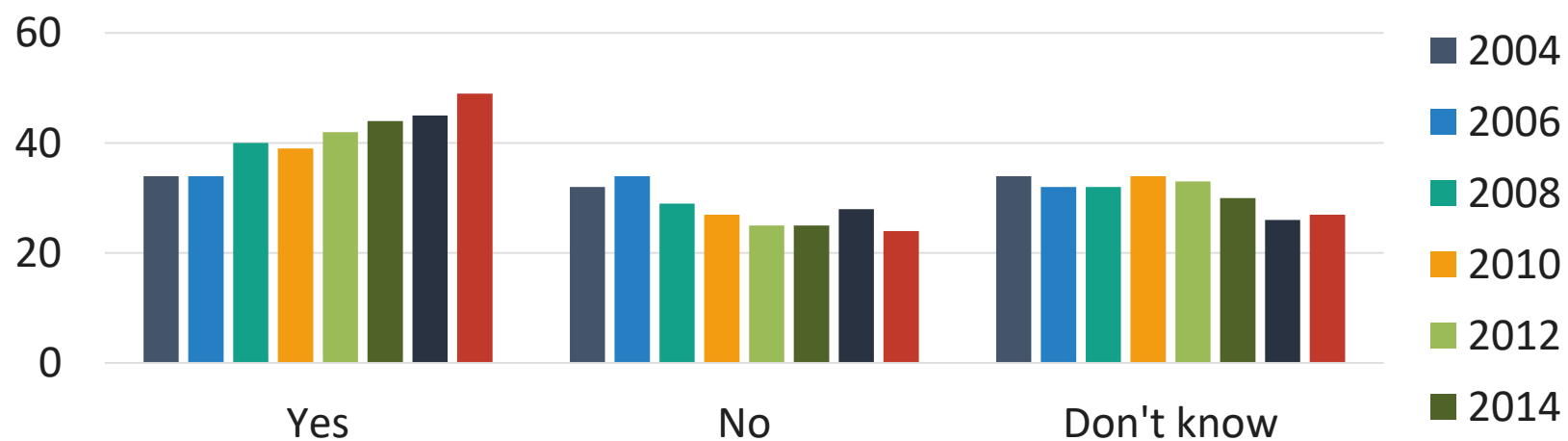
Attitudes towards whale harvesting remained stable over the years.  
**50%** disagree that it should be permitted.



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



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



Iceland N

**63%** of U.S. consumers believe that whales are endangered and **49%** said they would boycott products from a whale-hunting country.

There were no significant shifts in attitudes.

Consumers with high interest in Iceland are more likely to say they would boycott a whale-hunting country