

Tourism, Place and Identity: The Icelandic Version

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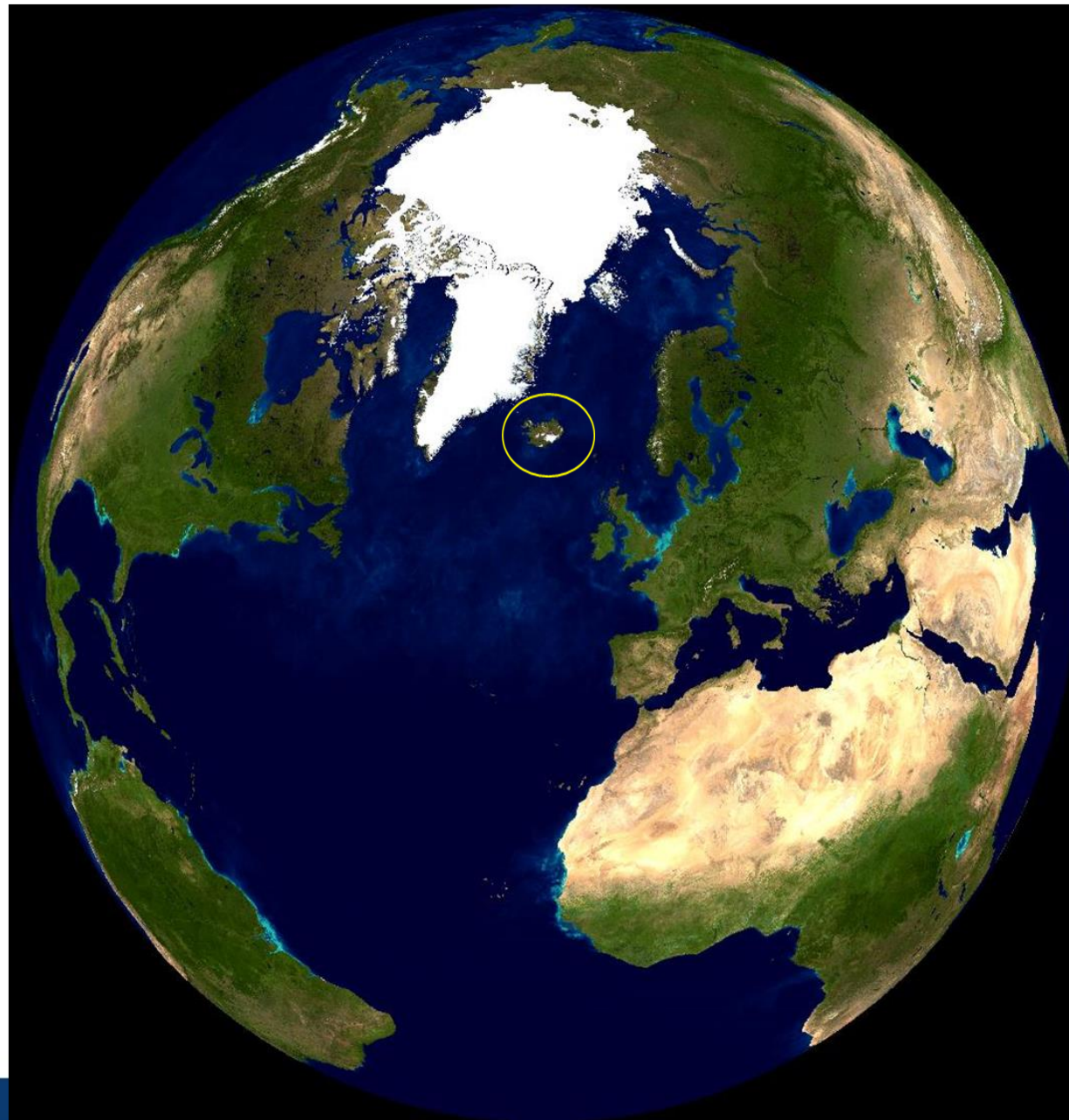
Outline

- Basic facts about Iceland
- Overview of Icelandic tourism
 - Rural tourism development
- Recent growth
- Sharing space with tourism
- Conclusions



Photo: Claus Sterneck



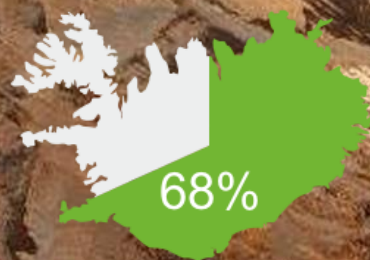


Some ^{very} basic facts about the country

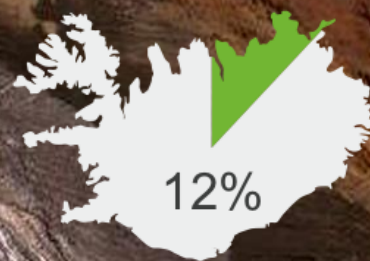
- Geologically very young and active
- Climatically... Cold, but warmer than you might expect!
- The last country in Europe to become settled
- Until very late 19th Century, a nation of subsistence farmers
- Uniquely among European countries, NO urban centres before!
- Considerable immigration since 2000
 - Now 8% of labor are international migrants
- Economic crisis 2008, then recovery
 - Unemployment rose to about 11%, but is now 3–4%



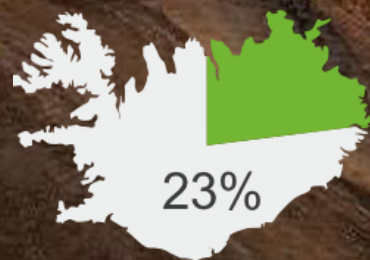
Wastelands



Glaciers

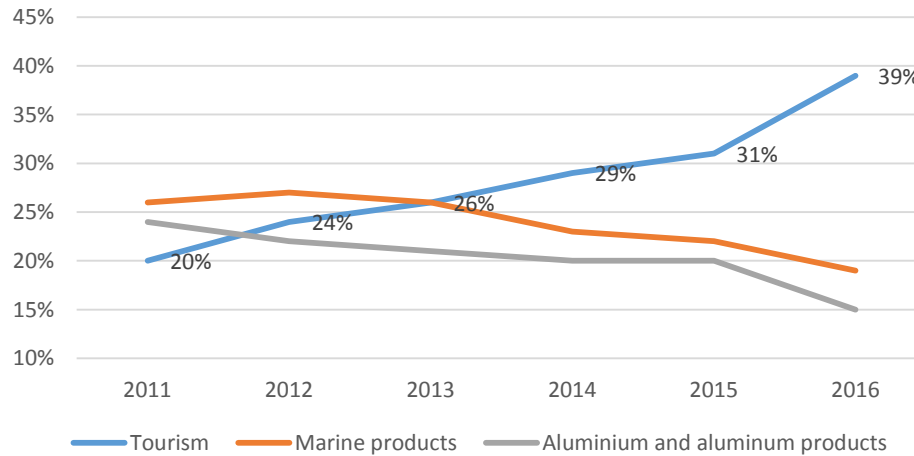


Vegetated area



Some key figures (100 ISK = 1,36 CAD)

Exports of goods and services (%)



About 24.000 employees in tourism on average 2016

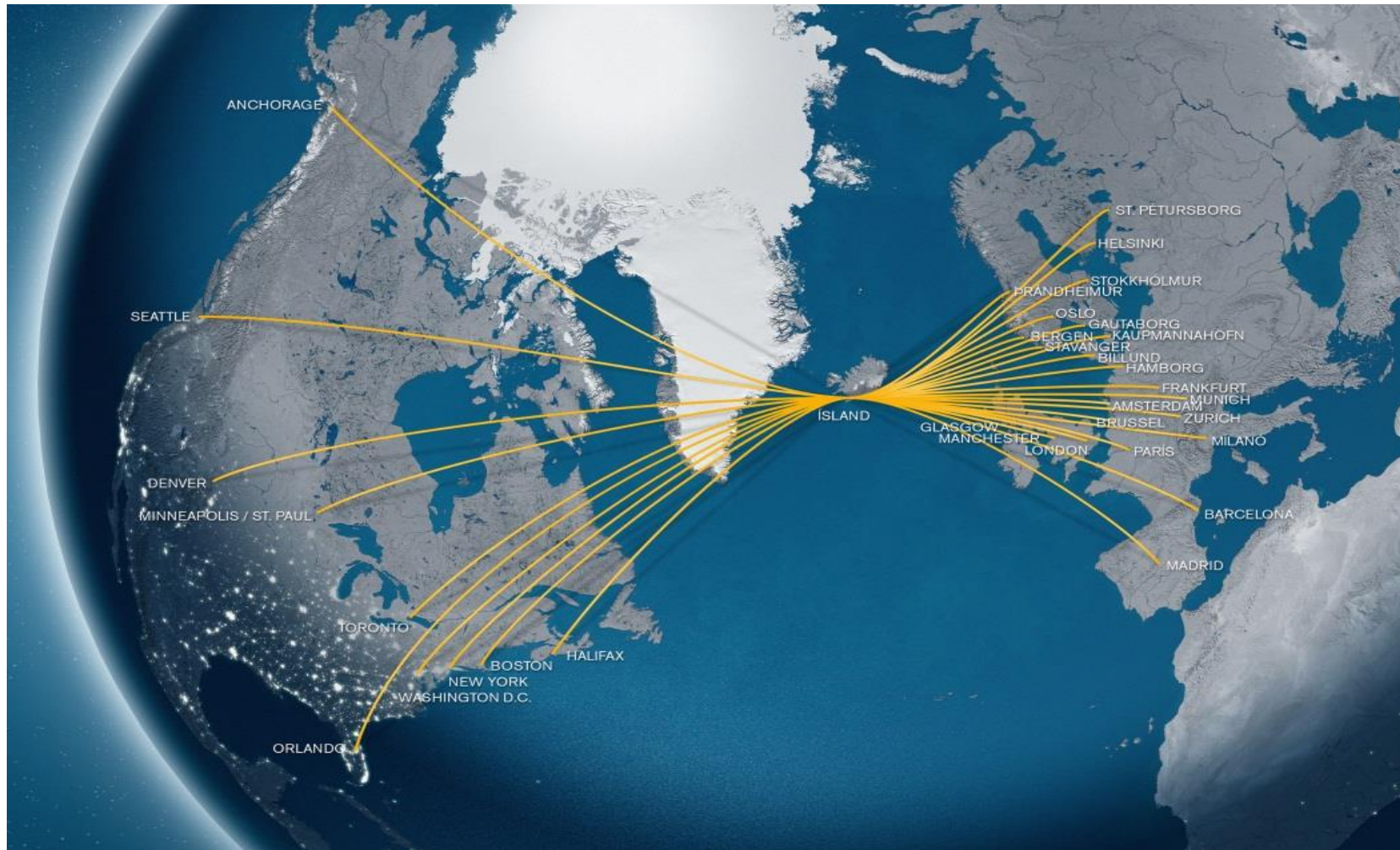
2010: 7,9% of Workforce
2016: 13,4% of Workforce

466 billion ISK
Revenues from foreign travelers

42%
Increase in tourism related jobs from 2010
(5,4% increase on labor market as a whole)

7-11 %
of GDP

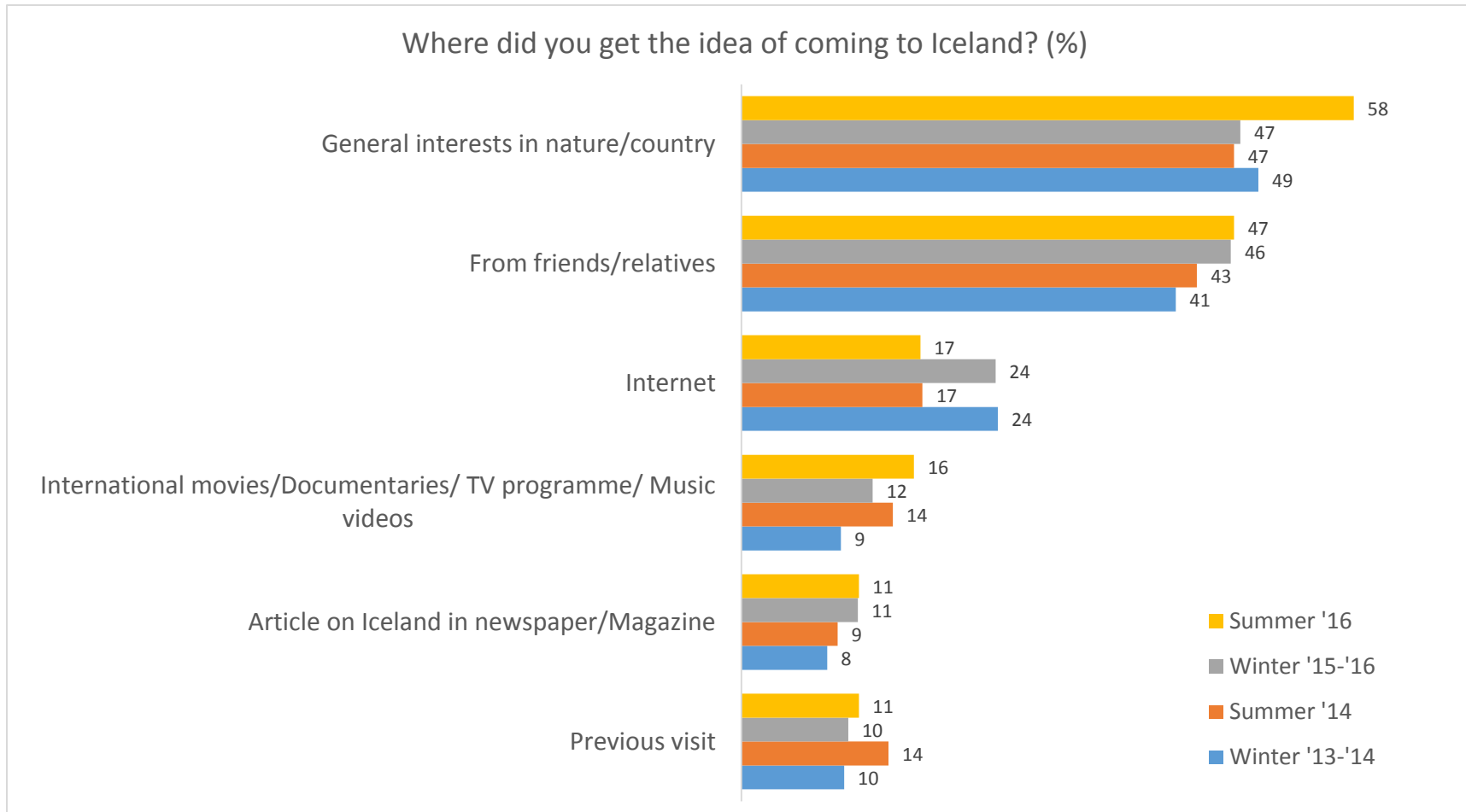
Icelandair route network



WOW AIR route network



Why travel to Iceland?



Ten Largest Market 2015

The Whole Year 2015

	Market	Arrivals	% Market share	% Change
▲ 1	USA	242.805	19,2%	+59,6%
▼ 2	UK	241.024	19,1%	+33,5%
- 3	Germany	103.384	8,2%	+20,3%
- 4	France	65.822	5,2%	+12,9%
- 5	Norway	51.402	4,1%	-4,2%
- 6	Denmark	49.225	3,9%	+2,0%
▲ 7	China	47.643	3,8%	+83,0%
- 8	Canada	46.654	3,7%	+20,3%
▼ 9	Sweden	43.096	3,4%	+5,1%
▼ 10	Holland	29.546	2,3%	+12,7%

Outside the high season (JAN-MAÍ, SEPT-DES) 2015

	Market	Arrivals	% Market share	% Change
- 1	UK	198.821	26,4%	+35,0%
- 2	US	135.571	18,0%	+58,9%
▲ 3	Germany	45.643	6,0%	+32,3%
▼ 4	Norway	34.555	4,6%	-0,7%
- 5	Denmark	30.422	4,0%	+5,4%
- 6	France	30.301	4,0%	+19,7%
- 7	Sweden	26.549	3,5%	+13,4%
- 8	Canada	26.284	3,5%	+16,4%
▲ 9	China	25.098	3,3%	+85,5%
▼ 10	Holland	15.939	2,1%	+16,6%

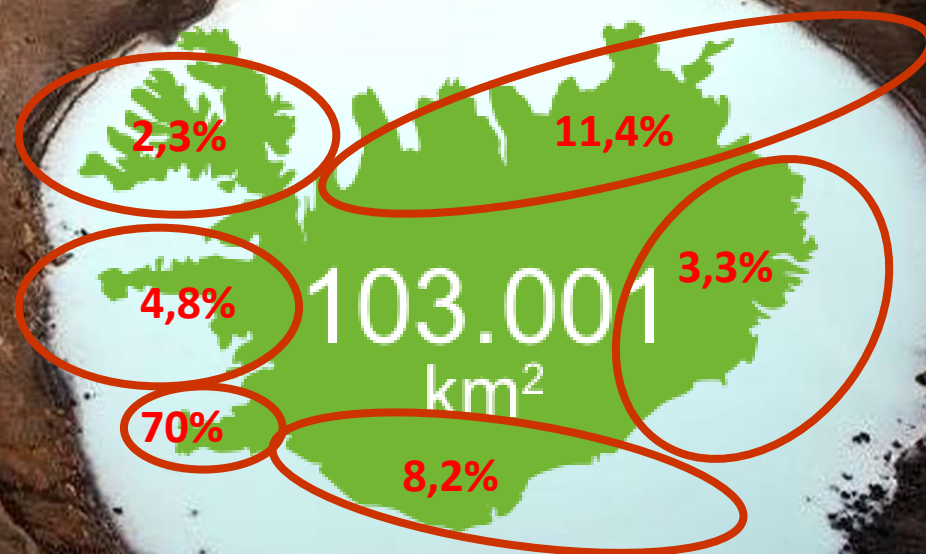
HEIMILD: FERÐAMÁLASTOFA, KOMUR ERLENDRA FERÐAMANNA UM KEF FLUGVÖLL



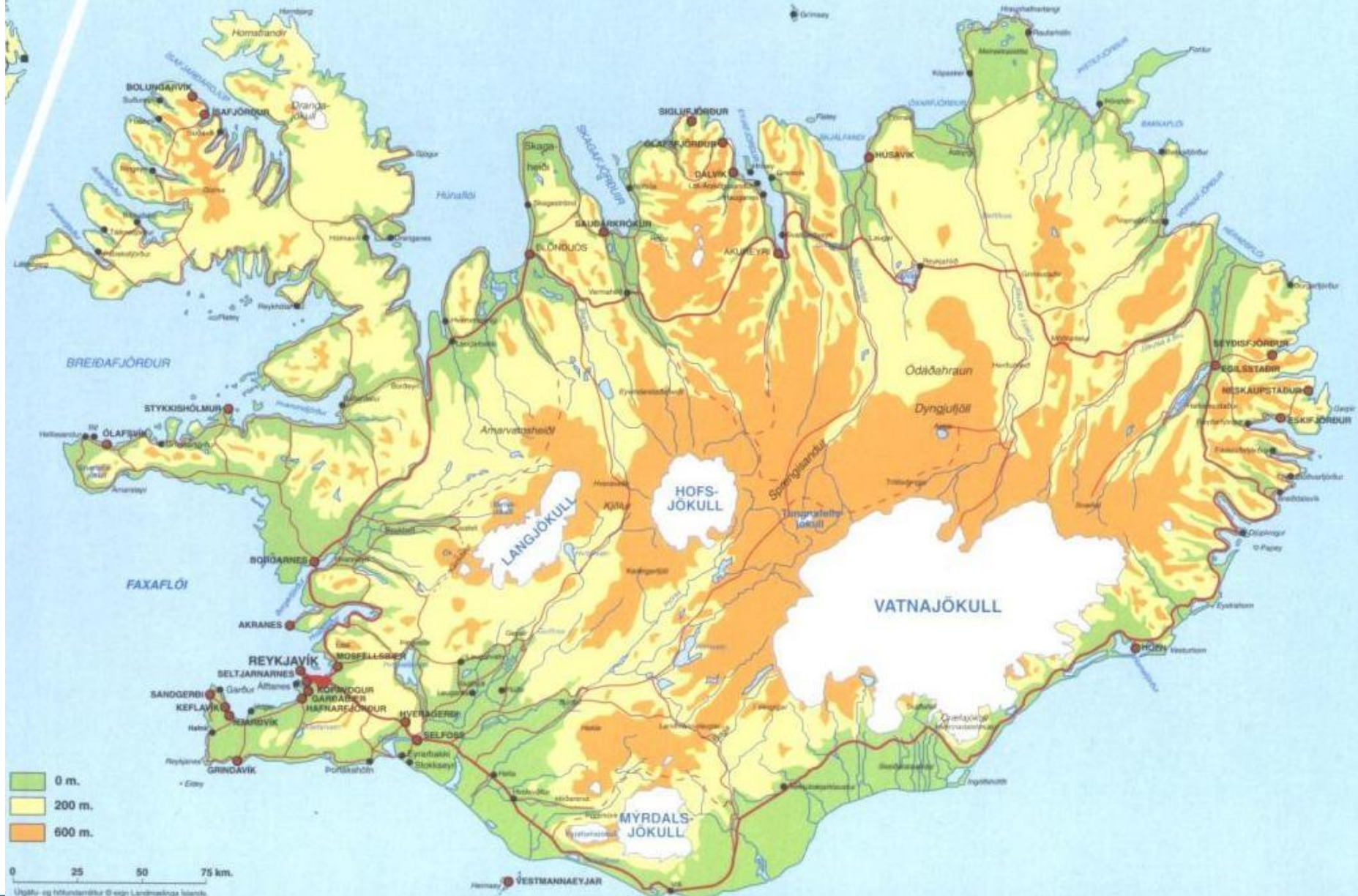
Tourism & rural development



Uneven population distribution



ICELAND



Útgiftu- og félagsmiðstöð © eign Landmælinga Íslands.



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Hopes

- Great expectations both by public authorities and individuals
 - New source of income and employment
 - Encouraging the re-population of rural communities
 - Various development schemes
- Rural tourism characterized by life style entrepreneurs
 - Motivated by place attachment and certain lifestyle
 - Not governed solely by perceived profit



Reality

- Tourism a venue for different encounters
 - The service provider an integral component of the tourism product
- Realizing the potential of tourism is a demanding task
 - Few active players - who's going to do it!
 - Limited capacity to engage in new things
 - Encouraged to grow but lack the support
- Predominantly low key ideas regarding future development
- Strong desire to be able to stay in control



Tourism Growth



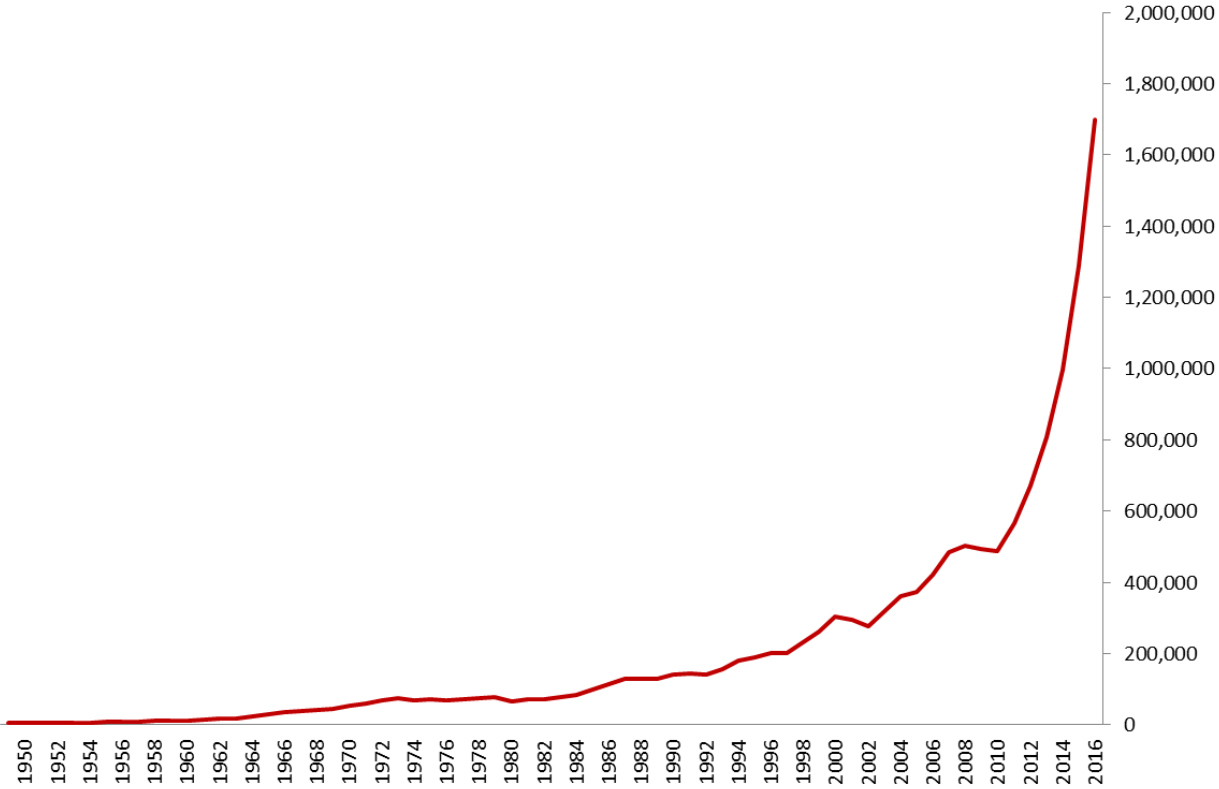
mbl.is/Ómar



Foreign visitors to Iceland

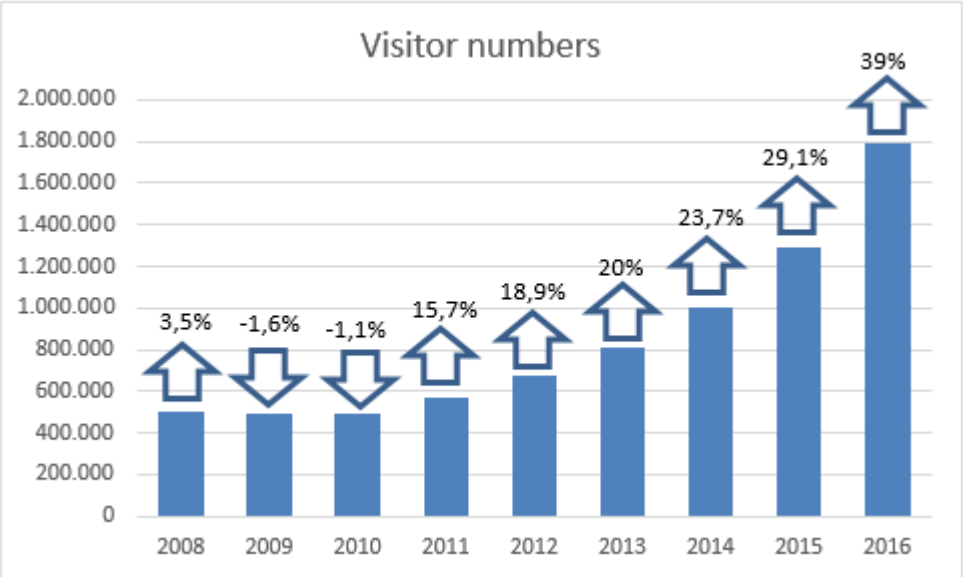
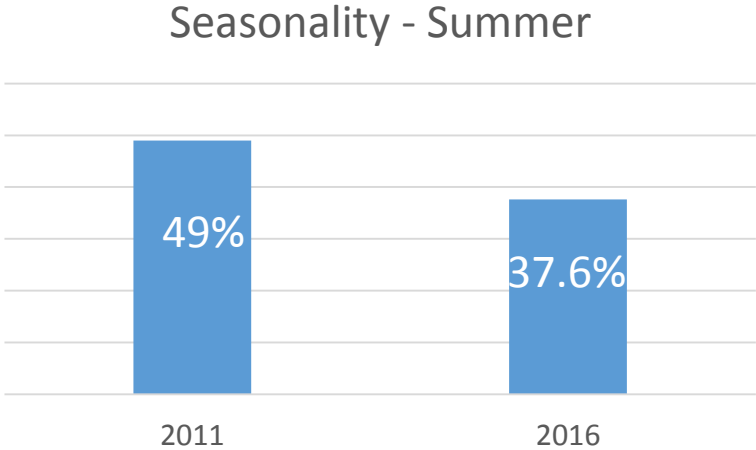
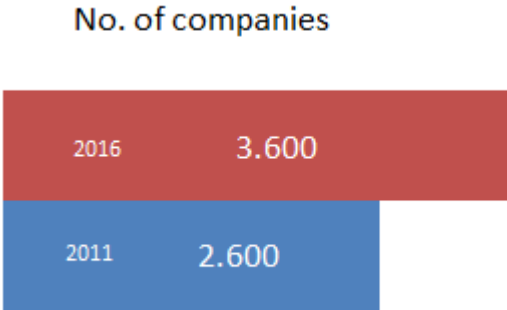
Total numbers 1949-2016* (*forecast)

— Visitors



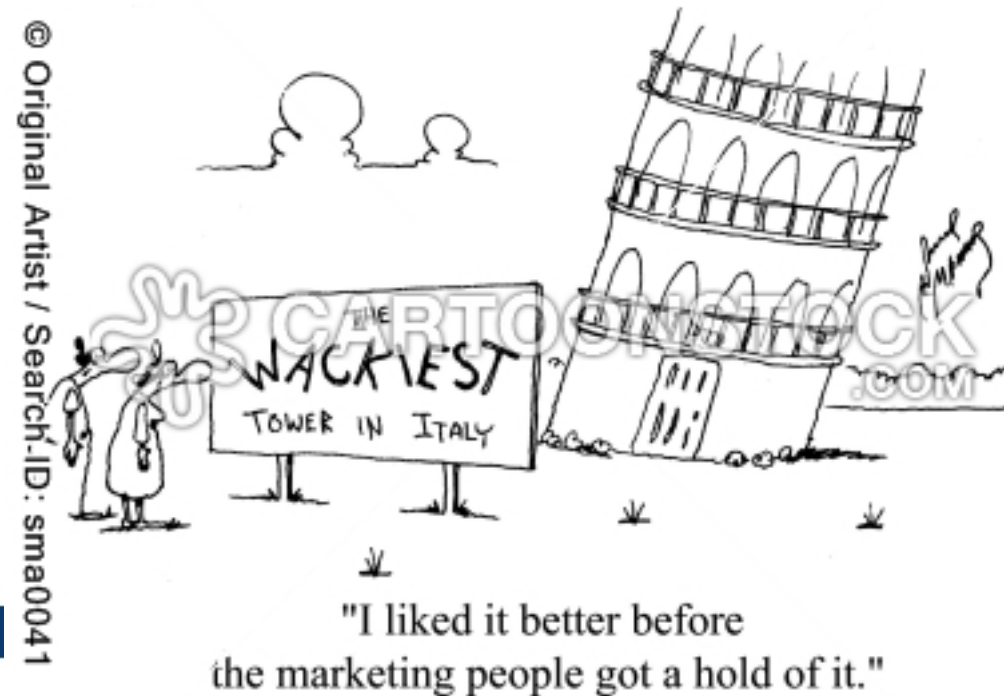
Growth indicators since 2011

217%
Increase in
tourist no.
2011-2016



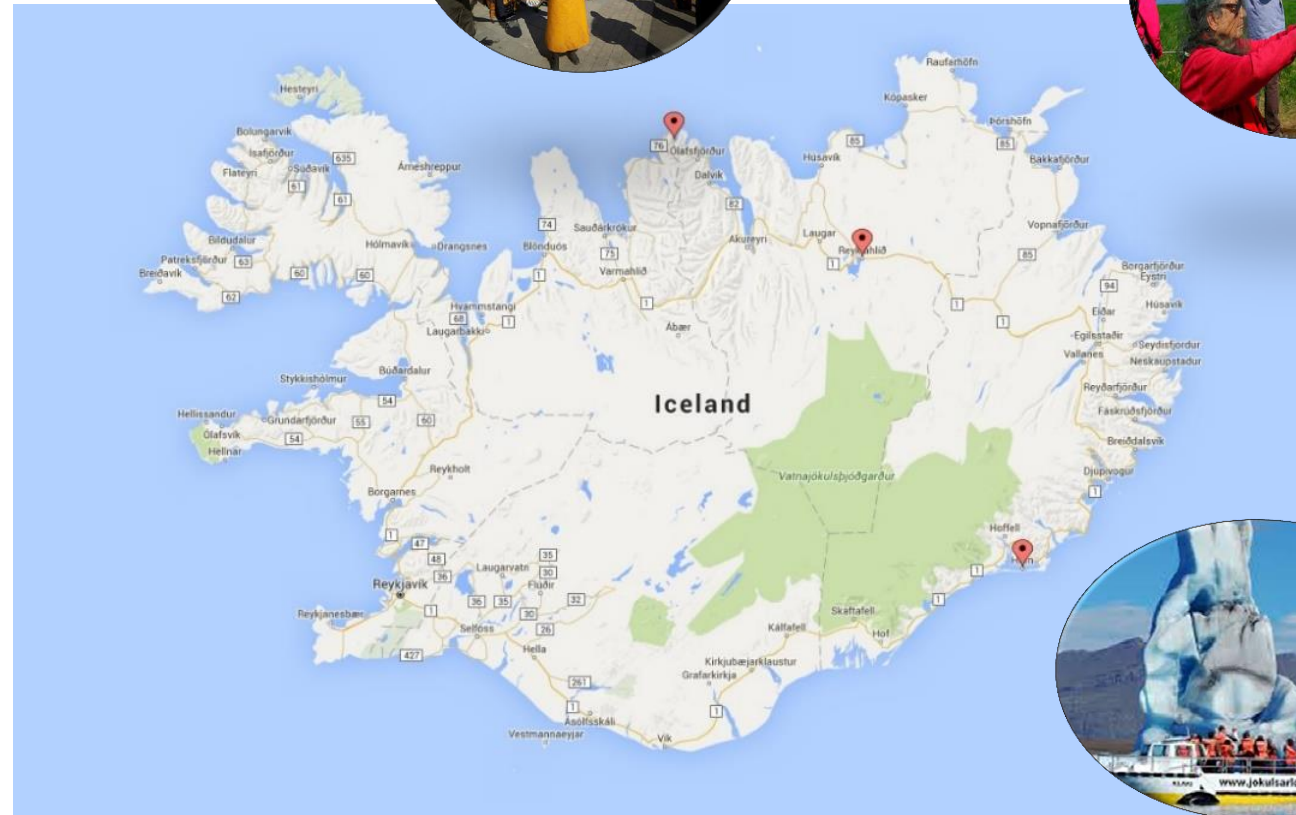
Increased pressure

- Tourism changes the landscape
 - Nature
 - **Community**
- Each place is unique
- Important to understand how residents experience tourism
- Tourism dynamics - Place dynamics



Recent Study

- Three different places
 - different time scales of tourism development
 - different attitudes towards tourism
 - Phone survey + interviews



What do you think about the number of tourists during the summer?

	<i>Far too many</i>	<i>Rather too many</i>	<i>In adequate numbers</i>	<i>Rather too few</i>	<i>Far too few</i>	<i>Number of answers</i>	<i>Mean (scale: 1-5)</i>
	Þeir eru allt of margir (5)	Þeir eru heldur margir (4)	Þeir eru hæfilega margir(3)	Þeir eru heldur fáir (2)	Þeir eru allt of fáir (1)	Fjöldi svara	Meðaltal***
Alls Total	19%	26%	50%	5%	0%	630	3,59
Siglufjörður	5%	15%	72%	8%	0%	264	3,17
Mývatnssveit	39%	38%	21%	2%	0%	127	4,15
Höfn	23%	32%	40%	4%	0%	239	3,74
Landskönnun 2014	8%	21%	65%	5%	1%	1125	3,30

* = $p < 0,05 \geq 0,01$; **= $p < 0,01 \geq 0,001$; ***= $p < 0,001$



Service is more directed at tourists than residents

	Strongly agree	Rather agree	Neither agree nor disagree	Rather disagree	Strongly disagree	Number of answers	Mean (scale: 1-5)
	Mjög sammála (5)	Frekar sammála (4)	Hvorki sammála né ósammála (3)	Frekar ósammála (2)	Mjög ósammála (1)	Fjöldi svara	Meðaltal***
Alls Total	11%	23%	17%	35%	13%	627	2,86
Siglufjörður	3%	16%	16%	44%	21%	262	2,36
Mývatnssveit	18%	36%	20%	22%	3%	127	3,44
Höfn	17%	25%	17%	33%	8%	238	3,10

* = p < 0,05 ≥ 0,01; ** = p < 0,01 ≥ 0,001 ; *** = p < 0,001



Tourists disturb my daily life more now than before

	Strongly agree	Rather agree	Neither agree nor disagree	Rather disagree	Strongly disagree	Number of answers	Mean (scale: 1-5)
	Mjög sammála (5)	Frekar sammála (4)	Hvorki sammála né ósammála (3)	Frekar ósammála (2)	Mjög ósammála (1)	Fjöldi svara	Meðaltal***
Alls Total	10%	18%	9%	33%	30%	632	2,45
Siglufjörður	2%	8%	7%	37%	46%	265	1,83
Mývatnssveit	23%	37%	10%	23%	7%	126	3,46
Höfn	11%	20%	10%	35%	24%	241	2,60

* = p < 0,05 ≥ 0,01; ** = p < 0,01 ≥ 0,001 ; *** = p < 0,001



Tourism has had a positive effect on living conditions in the region

	Strongly agree	Rather agree	Neither agree nor disagree	Rather disagree	Strongly disagree	Number of answers	Mean (scale: 1-5)
	Mjög sammála (5)	Frekar sammála (4)	Hvorki sammála né ósammála (3)	Frekar ósammála (2)	Mjög ósammála (1)	Fjöldi svara	Meðaltal**
Alls Total	31%	38%	10%	13%	9%	619	3,68
Siglufjörður	42%	44%	8%	5%	1%	257	4,21
Mývatnssveit	30%	44%	10%	10%	6%	125	3,83
Höfn	19%	27%	12%	23%	20%	237	3,02

* = $p < 0,05 \geq 0,01$; **= $p < 0,01 \geq 0,001$; ***= $p < 0,001$



Due to tourism there is a shortage of housing

	<i>Strongly agree</i>	<i>Rather agree</i>	<i>Neither agree nor disagree</i>	<i>Rather disagree</i>	<i>Strongly disagree</i>	<i>Number of answers</i>	<i>Mean (scale: 1-5)</i>
	Mjög sammála (5)	Frekar sammála (4)	Hvorki sammála né ósammála (3)	Frekar ósammála (2)	Mjög ósammála (1)	Fjöldi svara	Meðaltal***
Alls Total	55%	27%	5%	10%	3%	621	4,20
Siglufjörður	24%	36%	9%	24%	7%	254	3,45
Mývatnssveit	73%	24%	2%	2%	0%	126	4,68
Höfn	78%	19%	2%	1%	0%	241	4,74

* = $p < 0,05$; $\geq 0,01$; **= $p < 0,01$; $\geq 0,001$; ***= $p < 0,001$



I am proud that tourist wants to visit my town

	<i>Strongly agree</i>	<i>Rather agree</i>	<i>Neither agree nor disagree</i>	<i>Rather disagree</i>	<i>Strongly disagree</i>	<i>Number of answers</i>	<i>Mean (scale: 1-5)</i>
	Mjög sammála (5)	Frekar sammála (4)	Hvorki sammála né ósammála (3)	Frekar ósammála (2)	Mjög ósammála (1)	Fjöldi svara	Meðaltal***
Alls Total	67%	28%	3%	2%	1%	634	4,59
Siglufjörður	82%	17%	0%	1%	0%	265	4,80
Mývatnssveit	53%	35%	6%	5%	1%	127	4,35
Höfn	57%	37%	3%	1%	1%	242	4,48

* = p < 0,05 ≥ 0,01; ** = p < 0,01 ≥ 0,001; *** = p < 0,001



Interviews: Concerns and happiness

- **Mývatn**

- The economic gain for the municipality is not reflecting the size of the tourism industry
- Crowded store - crowded roads
- Too much contact?

- **Höfn**

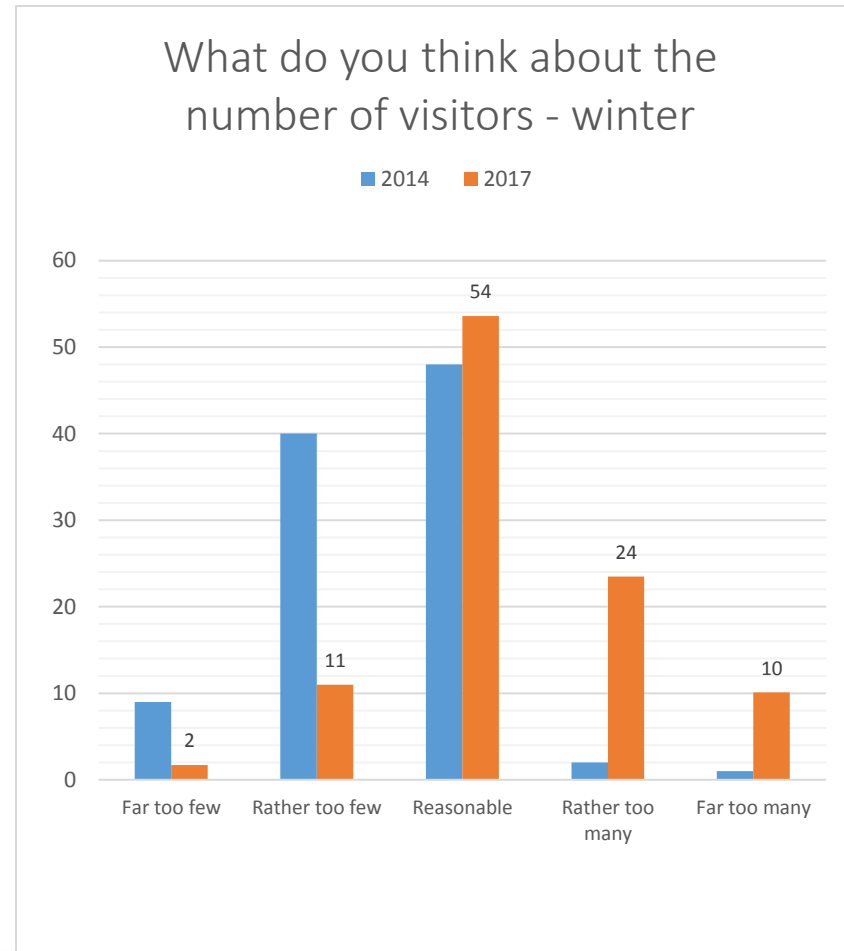
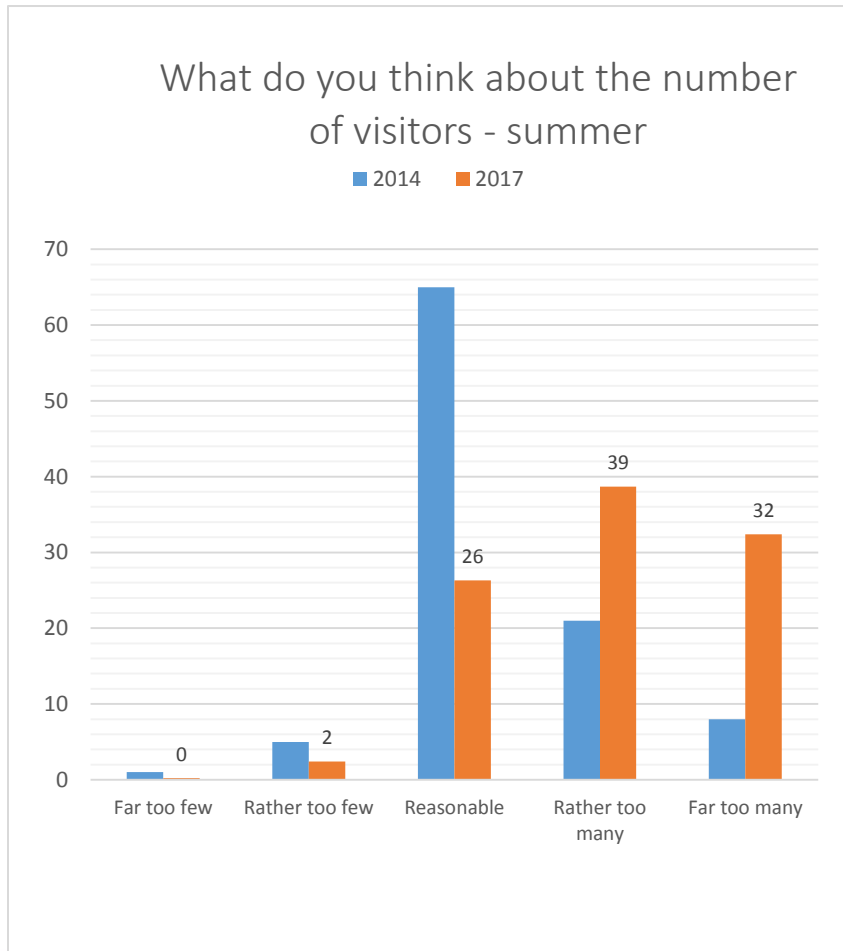
- Tourism makes it impossible to buy or rent properties
- Increased winter tourism causing increased pressure on rescue teams, emergency services (ambulances, etc.)

- **Siglufjörður**

- More lively town
- Change in atmosphere, increased optimism
- Houses have been renovated

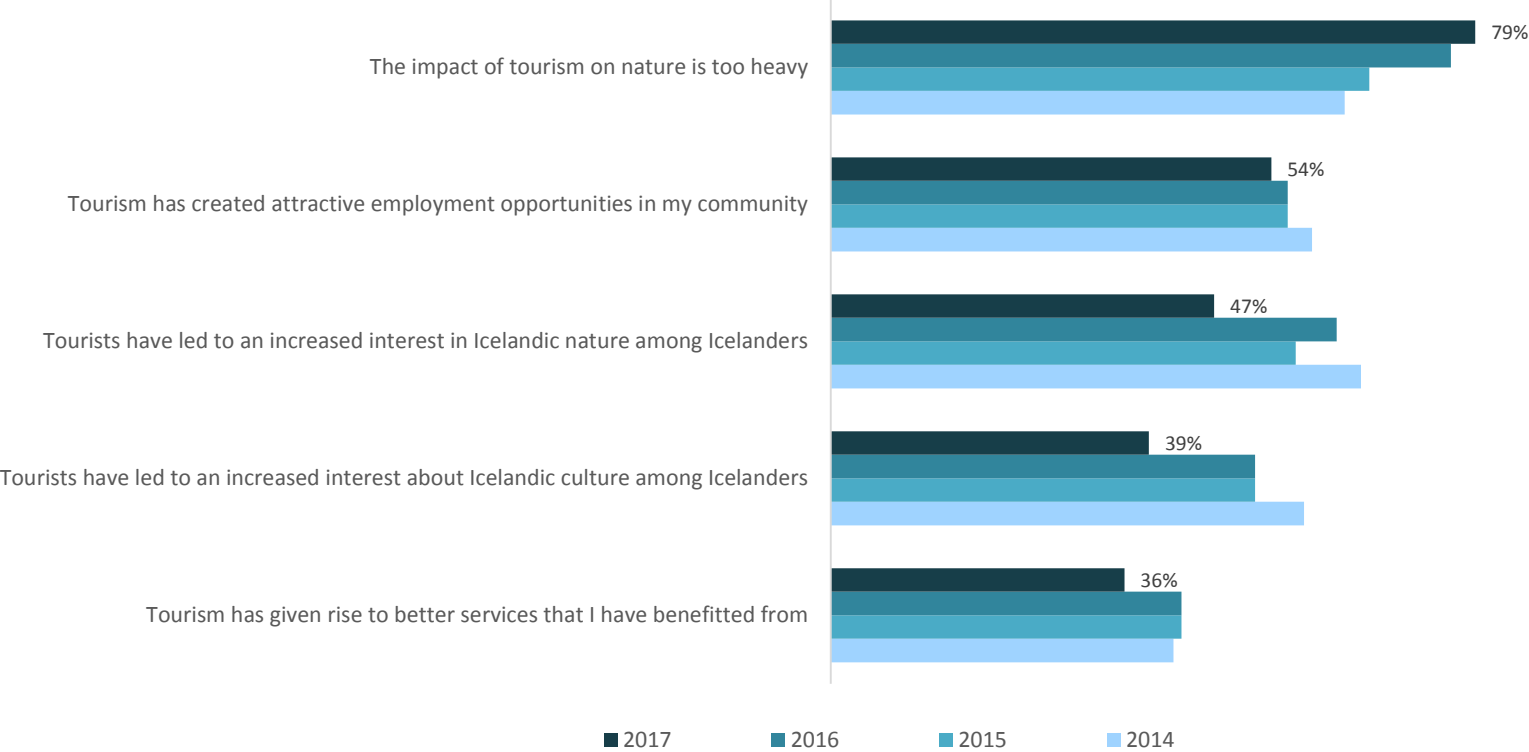


Residents attitudes – national survey



Residents attitudes – national survey

Impact of tourism - residents perceptions



Source: Iceland Tourist Board

Sharing space is a complicated matter

travelweekly

Live the Thai life

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Tourism 'destroying' cities, says Amsterdam marketing head

by Ian Taylor

May 5th 2017, 10:20

f t in G+

Europe's historic cities are "dying" from pressure of tourism, according to the head of Amsterdam Marketing, who singled out Ryanair and Airbnb for criticism.

Frans van der Avert, Amsterdam Marketing chief executive, said: "Cities are dying from tourism. No one will be living in the historic centres any more.

"A lot of smaller historic cities in Europe are getting destroyed by visitors."

Van der Avert told the World Tourism Forum in Lucerne: "We don't spend even €1 in marketing Amsterdam any more.

"We don't want to have more people. We want to increase the quality of visitors – we want people who are interested in the city, not who want it as a backdrop for a party."

"We see lots of visitors with no respect for the character of the city. Low cost carriers create a problem. Ryanair [passengers] – they are the loudest."

He identified Barcelona, Prague and Dubrovnik as similarly affected and warned the industry faces a backlash from city residents which could determine future policies towards tourism.

"Amsterdam is not a big city – 800,000 live in the city and we have 17 million visitors a year," he



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Tourism: The Destruction Of Iceland



LAURA MALLONEE PHOTO 05.22.17 8:30 AM

ICELAND IS BEAUTIFUL EXCEPT FOR THE 2 MILLION TOURISTS

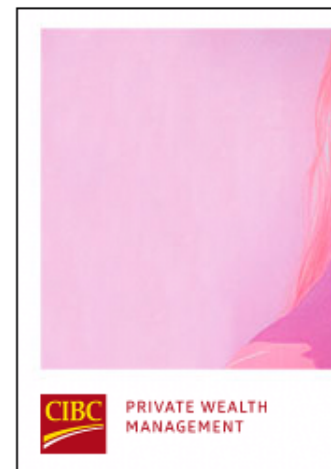
SHARE



ICELAND IS A windswept, volcanic island about the size of Kentucky. It's a beautiful place, a land of vast tundra, stunning fjords, and tumbling waterfalls. You could call it idyllic. Quiet even. Well, before the tourists found it, that is.

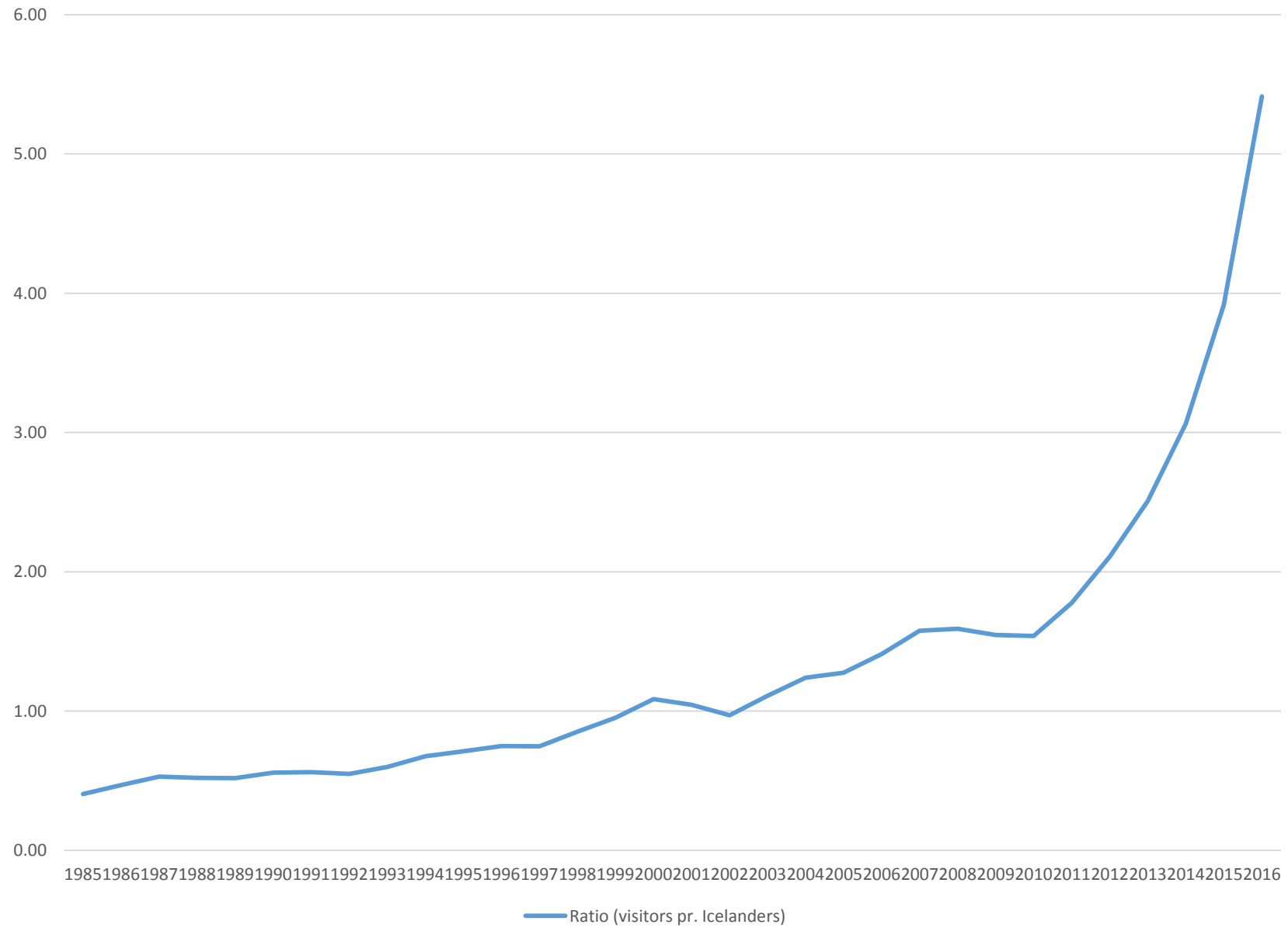
MORE PHOTOGRAPHY

Cheap flights and the exposure brought by *Game of Thrones* conspired to make Iceland *the* vacation destination. The place teems with globetrotters, and French



LEADER





Whose place is it?

- Places are collectively and constantly produced
- Places can't be held on standstill with a never changing identity, rather the identity of a place manifests itself in and through negotiations of relations
- Issues of importance:
 - Quality of life
 - Housing
 - Real estate prices
 - Services
 - Availability / Accessibility
 - Public services
 - Supply / Cost
 - Involvement



A shift in paradigm

- A societal change
 - Communities today do not consist of residents, but residents AND temporary residents
 - Each group has its own needs
 - Public policy and planning has to take this into account
- Responsible tourism requires cooperation
 - To ensure that visitors experiences meet expectations
 - To ensure that residents experiences meet expectations
- Setting a new course
 - We have to figure out where we need to be



Roadmap for Icelandic tourism

- Published in October 2015
- Establishment of “Whole of government” task force:
 - Minister of Finance
 - Minister of Environment
 - Minister of the Interior
 - Minister of Industry and Commerce (chair)
- Plus:
 - 4 representatives from industry (ITIA)
 - 2 representatives for local government



Seven focal points



At last

- What do we want from tourism?
- What can tourism do for us?
- What impact do we want tourism to have on our communities and our environment?
- We still need to understand better what happens when a place becomes a tourist destination and how people observe, understand and participate in this change
- This means that we need to manage tourism - instead of being managed by it





Thank you!



