ICELAND TOURISM DEVELOPMENT AND CHALLENGES

How to sustain a growing tourism industry?

Hållbar besöksnäring – hållbar samhällsutveckling
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Passengers through KEF international airport
The ITB count of departing foreigners at KEF
Foreign pax overnights at all accommodation providers
Passengers through KEF international airport
The ITB count of departing foreigners at KEF
Foreign pax overnights at all accommodation providers
Why this explosive growth?

- E15
- Aviation
- Marketing and promotion
- The devaluing of the ISK
Number of airlines flying to/from KEF

- **Winter (ca. 27/10-30/3)**
- **Summer (ca. 31/3-26/10)**

<table>
<thead>
<tr>
<th>Year</th>
<th>Winter</th>
<th>Summer</th>
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<td>2011-2012</td>
<td>5</td>
<td>17</td>
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<td>2012-2013</td>
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<td>17</td>
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<td>2013-2014</td>
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<td>2014-2015</td>
<td>9</td>
<td>19</td>
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<td>2015-2016</td>
<td>9</td>
<td>24</td>
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<td>2016-2017</td>
<td>15</td>
<td>26</td>
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THE A-Ö OF ICELAND

Explore the A-Ö of Iceland. Complete all our classes for the chance to win a trip to Iceland. We're truly excited for you to learn the a-ö of all seven regions.

COME PREPARED

ICELAND ACADEMY

Iceland is an amazing country filled with beautiful nature, wonderful food, and inspiring art and culture. We want to help you get the most of it. Our unique online Iceland Academy has been specially designed to teach you the essentials of Iceland.

ENROLL NOW
TAKE THE ICELANDIC PLEDGE

Become a responsible tourist and take The Icelandic Pledge. Encourage your friends to do the same.

TAKE THE PLEDGE →
Icelandair wins Golden Palm for Buddy system campaign 2017 (see here)
Air Iceland Connect – route map
Share of all bednights

- % International
- % Domestic
2016 ALL OVERNIGHTS

Höfuðborgarsvæði
Landsbyggðir
REGIONAL ACCOMODATION – GINI

GINI stuðull gistínátta erlenda ferðamanna
1 = öll gisting árs fellur innan eins mánaðar
0 = gisting drefist jafnt á alla mánuð árs

Höfuðborgarsvæði
Suðurnes
Vesturland
Norðurland vestra
Norðurland eystra
Austurland
Suðurland
Tourism in Iceland is characterized by the strong interest tourists show in gazing at, playing in and enjoying nature. It involves travel to the various natural attractions, such as mountains, glaciers, volcanoes, lava fields, geysers, sand fields, rivers, waterfalls, a varied coastline and a vast wilderness area in the central Highlands.


Until now, Icelandic nature destinations have been characterized mainly by very limited infrastructure and little commercialization and can be considered underdeveloped with regard to recreation and tourism. With the rapid increase in tourism in the last decades this is gradually changing and investments have been made recently into road construction, parking places, toilet facilities, designed footpaths and a few visitor centres.

THE RESOURCE
SOME CRUISE STATS

Top harbours (>10 ship arrivals pr. year)

Average length of stay (hrs.)
Tourist (pax) day excursions from Cruise
SOME CRUISE STATS

- 2015
- 2014
- 2013
- 2012
- 2011
- 2010
- 2009

Key:
- Reykjavík
- Akureyri
- Ísafjörður
- Other
In order to translate the positive atmosphere around tourism at present into a sustainable tourism development policy for the future more work is needed. Policy-making is to be based on a sustained engagement with the tourism resources in all their complexities (read destination). What still lurks underneath the surface of governmental policy discourse in Iceland is no analysis or coherence, apart from seeing tourism as part and parcel of revenue-generating industries. The policy discourse is not founded on any joint platform of collaboration involving nationwide stakeholders. During times of crisis, it comes to light that the discourse is simply ‘blurby’ lacking ‘spatial moorings’.

Jóhannesson & Huijbens, 2010: Tourism in times of crisis
In Current Issues in Tourism. 13, p. 431-432
He pauses, before settling on an unimprovably Icelandic metaphor. “Tourists are people, and people are not herring.”
MY ADVICE TO THE POLICY MAKERS

• Define the role of institutions and their communication pathways.
• Ensure coherent and quality data gathering on one neutral hand (Statistics Iceland).
• Set up a resource inventory based land-use strategy.
• Define the role of education in tourism and its setup from vocational training to research work.
• Demand compliance in quality assurance schemes.
• Define revenue sources for the public from the industry, using existing system of taxation to levy charges.
• Join up transport infrastructure in the country.
• Define industry success measures beyond quantitative and countable means.
• Ensure third party review of policy making in the industry.
Sustainability challenges

• Economic
  – Seasonality, quality of jobs

• Social
  – Seasonality and concentrations of people in few small places, pressures on cultural vitality, coping with greed.

• Environmental
  – Carbon footprinting, fragile attractions and ecosystems

Degrowth, slow tourism and staying home
Thank you ...