



Slow Adventure in Iceland

Segmentation study of potential
inbound visitors to iceland

Johannes T. Welling and Edward H. Huijbens

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Publisher: Icelandic Tourism Research Centre, Borgum v/ Nordurslod, IS-600
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Web: www.rmf.is

Title: Slow Adventure in Iceland. Segmentation study of potential inbound
visitors to Iceland

Author: Johannes T. Welling and Edward H. Huijbens

Cover: Ásprent-Stíll and the ITRC

Printing: Stell (www.stell.is)

Number: RMF-S-05-2016

ISBN: 978-9935-437-51-8

ISSN: 1670-8857

Cover picture: Kayak tour on Heinabergsjökull 2016. © Þorvarður Árnason.

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ICELANDIC TOURISM RESEARCH CENTRE

DECEMBER 2016

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1. Introduction

Since the late nineties, adventure tourism has grown rapidly as outdoor recreation has become increasingly commercialized and framed as a purchasable short-term holiday experience alienated from its natural embedding (Buckley, 2007). As a reaction to the commodification and dislocation of mainstream adventure tourism both from its natural setting and the broader narratives of journey, dwelling and exploration, the concept of *slow adventure* has been introduced in the tourism academic literature (Varley and Semple, 2015). Developed from that strand of thinking, The Slow Adventure In Northern Territories (SAINT) project of the Northern Periphery and Arctic Programme (NPA) was designed. Its main aim is to elaborate on the concept of slow adventure tourism in terms of product development and develop new marketing models of this outdoor adventure recreation niche in the Nordic countries.

Iceland has become a popular destination for different forms of adventure tourism in the last two decades. A broad array of guided and unguided adventure activities is provided and conducted in the various natural areas of Iceland, such as Ice climbing, wild water rafting, mountain biking or snowmobiling on one of the countries' several glaciers. Although a considerable part of the outdoor recreational activities involves some degree of risk and thrill, the majority are soft adventure activities that involve minimal real risk and demand limited technical skills and experience (Pomfret, 2006). Moreover, they draw heavily on the wilderness allure of Iceland. With its wilderness appeal and limited infrastructure Iceland would, at first glance, seem to be a potential supply for slow adventure tourism product development (Sæþórsdóttir, 2010; Sæþórsdóttir, Hall and Saarinen, 2011).

Part and parcel of targeted product development is a recognition of the possible demand. The central aim of this study is thus to gain a better insight into the possible presence and characteristics of slow adventure tourists in Iceland. To try and identify this particular segment an existing data base of psychographic, travel behavioural and social-economic background characteristics of potential inbound visitors to Iceland was used derived from a consumer survey conducted in April 2016 in Germany and the UK. The results of this survey constitute the basic visitor information source to identify and

group a slow adventure segment among the sample of potential inbound visitors to Iceland (see: Joensen, et.al, 2016).

With this existing data set, this study conducted a tiered visitor segmentation consisting of three general steps: First, the study discerned general personality traits of the slow adventurer from qualitative insights provided by partners to the NPA funded SAINT project work package 3 in which the ITRC is involved. The insights were gained from the work package report identifying characteristics of the slow adventure tourist. Second, a set of 14 consumers' activity, interest and opinion (AIO) statements from the original survey were selected corresponding to the identified characteristics of the slow adventurer. Third, a mix of factor and cluster analysis was employed to analyze the selected set of AIO statements from the visitor survey data, in order to identify, segment and typify a "slow adventurer" from the set of potential inbound visitors to Iceland. Fourth, cross tabulation with Chi-square tests were conducted for independence analysis and further description of the different visitor typologies based on the visitors' socio-economic profiles, media-use, travel behaviour and leisure preferences. All in all, three particular coherent segments of the slow adventurer were identified.

This report is in five chapter. The second chapter continues with the description of the slow adventurer characteristics based on the findings of the SAINT project work package three (WP3). Then, the third chapter of this study describes the visitor segmentation methodology. The fourth chapter outlines the results of the factor-cluster analysis and the independence analysis and provides a further description of the different visitor typologies. Finally, this report ends with a brief discussion conclusion and recommendations for the use of this study for the SAINT project.

2. Slow adventure personality characteristics

Slow adventure is defined as a form of tourism which avoids the quick adrenalin-pumping hits of convenient adventure experiences, in favour of slow, immersive journeys, living in and travelling through wild places and natural spaces - experiencing nature in its timeframe, its seasons, its weathers and its variations (CTR, 2016). The SAINT project work package three (WP3) aimed to develop a better understanding of consumer trends, customer typologies and the meanings and values that existing and potential consumers place on slow adventure experiences, as summarized and identified through the collaboration of the SAINT partners. The WP3 describes a set of slow adventurer themes that constitute general traits which characterize the slow adventurer. First, there is the slow adventurer's strong relationship with nature. The slow adventurer believes in the importance of spending time in nature, enjoys being out in nature's elements and finds wonder in the vastness of and proximity to nature. Furthermore, his or her conducted activities, take place in and are driven by nature, i.e. emphasis is placed on non-motorized ways of getting around, or self-propelled travel. Second, the search for relief from the daily routinized and stressful socio-economic environment constitutes an important motivation to engage in nature recreational activities by the slow adventure. For the slow adventurer, slow adventure opens up opportunities for 'switching off the clock', being physically and mentally away from the daily routine. Therefore, a feeling of escapism is an important travel push factor for the slow adventurer. A third general characteristic of the slow adventurers is their search for experiences that are obtained through unrestricted and flexible activity based modes of travelling in the outdoor. A desire for a unique and bespoke experiences which can change according to opportunity and situation, or as the winds blow. A fourth characteristic is slow adventurers' willingness to learn new skills and knowledge. This is an openness for experiences with an educational focus, derived from ways of being and doing in nature, not only now but also in the past. Therefore, a sense of connectedness and heritage is important for slow adventurers, particularly in terms of place. The slow adventurer finds wonder in the folklore that enriches the natural environment and enjoy eating or trying foraged or wild food. Finally, a last attribute of the slow adventurer is their willingness to share regular experiences of nature's power

and beauty with others and their enthusiastic embrace of social media platforms. The key traits of the slow adventurer are thus:

- Nature/wilderness immersion and reconnection
- Self-propelled means of experiencing nature/wilderness

The above described general and key personality characteristics were used to select consumers' activity, interest and opinion statements from the tourist psychographic segmentation survey performed in April 2015. The selected AIO statements were deemed to correspond and query the slow adventurer personality traits and allow for a specific segmentation of this new tourist niche concept in the Icelandic context. This procedure is described in the next chapter.

3. Methodology

3.1 Data collection

This research used a survey data set from potential visitors to Iceland from the United Kingdom and Germany that was gathered by means of an internet panel method. The internet panel in both countries was designed to reflect the general population based on each nations' census. Participants were registered and signed in by a double opt-in method to rule out those not credible. The data was collected in April 2016. A total of 4.075 completed digital questionnaires were collected. In order to establish psychographic characteristics of potential inbound visitors to Iceland only the respondents that indicated that they had visited Iceland before or those who intended to do so within 5 years (question 4 in the questionnaire) were included in the final sample of this study (n=1.135, 27,8% of the original sample) (Joensen, et.al, 2016).

3.2 Questionnaire design

The survey instrument used to collect the original data set was a self-administered questionnaire that consisted of three parts. The first part of the survey questionnaire consisted of 32 consumers' activities, interests and opinion (AIO) statements that were based on previous life-style and personal trait segmentation studies (Huijbens, et.al, 2015). These AIO statements were applied to define the respondents psychographic profile and were measured on a five-point Likert scale (where 1 = strongly disagree, 2 = tend to disagree, 3 = neutral, 4 = tend to agree, 5 = strongly agree). The second part of the survey consisted of questions regarding the respondents travel and leisure behaviour and use of media sources. The last part of the survey contained questions regarding the social-economic status of the respondents (Huijbens, et.al, 2015).

For this study, 14 statements were selected from the original 32 AIO statements that proposed appropriately the slow adventurer personal traits based on the characteristics of slow adventurers described in the previous chapter (table 1). These statements along with variable from the second and third part were further analyzed using statistical methods.

3.3 Statistical analysis

The statements were analyzed in three stages using SPSS statistical software package. In the first stage a descriptive statistics analysis was conducted to explore the overall sample profile. Second, an exploratory principle component analysis (PCA), as the appropriate tool amongst estimation methods of factor analysis, was applied. The PCA made it possible to eliminate correlation among the variables and helped to identify specific underlying personal trait factors. Subsequently, a K-means cluster analysis was applied in order to identify different groupings of individuals (i.e., potential visitor segments) based on personality traits. Cluster analysis procedures allow for identifying similarities among objects based on any number of variables, and allows for researcher interpretation of what latent constructs those classifications mean (Bey & Bruyere, 2007). Furthermore, an ANOVA test was used to identify whether there were any differences among the clusters, as measured by a comparison of mean ratings (for metric variables) and discriminant analysis was used to assess the accuracy level of classification of segment membership (Park & Yoon, 2009).

Table 1: Selection of personality traits statements on basis of slow adventurer traits themes

Slow adventurer traits themes from WP3 (CTR, 2016)	Related personality traits statements in questionnaire
<p><i>Nature centred</i></p> <ul style="list-style-type: none"> • <i>Slow adventurer</i> beliefs in the importance of making time to spend in nature. • <i>Slow adventurers</i> enjoy being out in nature's elements, and enjoy the associated exercise and fitness demands. • Activity in the outdoors is driven by the <i>slow adventurer's</i> a) love of nature. • The <i>slow adventurer</i> finds wonder in the vastness of nature and one's proximity to nature. 	<ul style="list-style-type: none"> • I want to be able to experience solitude and immerse myself in the beauty of nature. • I enjoy the outdoors and wilderness. • I prefer wilderness observation to physical activity. • I want the outdoor to challenge me.
<p><i>Escapism</i></p> <ul style="list-style-type: none"> • A feeling of escapism is a highly important motive for the <i>slow adventurer</i>. 	<ul style="list-style-type: none"> • When travelling I enjoy relaxing and getting away from my daily routine.

<p><i>Learning</i></p> <ul style="list-style-type: none"> • Activity in the outdoors is driven by the <i>slow adventurer's</i> willingness to learn new skills and knowledge. • <i>Slow adventurers</i> are internally motivated and open to experiences that are educational focused. 	<ul style="list-style-type: none"> • I actively seek for new travel experience. • I prefer to study my destination before visiting.
<p><i>Unrestricted travelling</i></p> <ul style="list-style-type: none"> • A sense of fun and freedom in the outdoors is important for the <i>slow adventurer</i>. • <i>Slow adventurers</i> have desire for unique and bespoke experiences which can change according to opportunity and situation. 	<ul style="list-style-type: none"> • I enjoy travel off the beaten track.
<p><i>Social travelling</i></p> <ul style="list-style-type: none"> • <i>Slow adventurer</i> willingness to share regular. experiences of nature's power and beauty with others • <i>Slow adventurer</i> enthusiastic embrace of social media platforms. 	<ul style="list-style-type: none"> • I want to share my travel experiences through social media. • I enjoy the company of other tourists when travelling.
<p><i>Local cultural ties</i></p> <ul style="list-style-type: none"> • A sense of connectedness and heritage is important for <i>slow adventurers</i>, particularly in terms of place. • <i>Slow adventurer</i> finds wonder in the folklore that enriches the natural environment. • <i>Slow adventurer</i> enjoys eating or trying foraged or wild food. 	<ul style="list-style-type: none"> • I find exposure to local customs, routines and rituals revitalizing. • Trying and tasting local cuisine is a must when travelling. • I want to buy local products from places I visit. • I think it is important to experience the history and culture of the destination that I visit.

In the last stage of the analysis, cross tabulation with chi-square analysis was applied to explore the difference between the clusters in terms of categorical variables, such as social-economic background, travel behaviour, leisure activities and media use.

4. Results

4.1. Sample profile

The demographic profile of the respondents living in Germany and the UK who were analysed in this study is summarized in Table 2. The respondents were relatively equally distributed among the age groups with a slightly predomination of the age groups 55-64 (20%) and 25-34 (19%). The majority of respondents were employed (66%), came from urban areas (76%), achieved a post-secondary or higher education level and never visited Iceland before (73%), but all those analysed were selected on the criteria if they intended to visit the island within 5 years.

Table 2: Demographic profile respondents (n=1.135)

	Frequencies (%)		Frequencies (%)
<i>Age groups</i>		<i>Gender</i>	
< 20 years old	51 (5%)	Male	543 (48%)
20 to 24 years old	138 (12%)	Female	592 (52%)
25 to 34 years old	220 (19%)	<i>Occupation</i>	
35 to 44 years old	179 (16%)	Employed	749 (66%)
45 to 54 years old	202 (18%)	Unemployed	33 (3%)
55 to 64 years old	222 (20%)	Other (disabled, homemaker, retired)	226 (20%)
65 years or older	123 (11%)	Student	113 (10%)
<i>Highest achieved education level</i>		Do not know/say	14(1)
No formal education	7 (1%)	<i>Township</i>	
Primary school	21 (2%)	Large city	331 (30%)
Secondary education	181 (17%)	Small city or medium- sized town	522 (46%)
Post-secondary non- tertiary education	442 (38%)	Rural area or village	276 (24%)
University first degree	308 (27%)	<i>Visit Iceland before</i>	
University higher degree	156 (14%)	Yes, once	210 (19%)
Do not know/say	12 (1%)	Yes, twice or more	100 (9%)
<i>Household income</i>		No	826 (73%)
Low	124 (11%)		
Low average	202 (18%)		

Average	444 (39%)	<i>Country of residence</i>	
High average	248 (22%)	UK	583 (51%)
High	57 (5%)	Germany	553 (49%)
Do not know/say	60 (5%)		

4.2 Factor analysis

A factor analysis with a *varimax* rotation was employed to the 14 statements to identify the underlying dimensions of the potential inbound visitor personality traits. The factor analysis produced a four-factor solution explaining 58,2% of the variance (Table 3). The four dimensions which were identified by the factor analysis were then named according to the range of items they respectively grouped. Factor loadings above 0,40 only were retained and each item contributed at least for an eigenvalue of one (Frochot, 2005). Reliability coefficient (Cronbach's alpha) was computed for each of the factors. Cronbach's alpha measures a coefficient of reliability (or consistency). A reliability coefficient of 0,70 or higher is considered acceptable in most social science research situations.

The first factor was labelled 'Unconditioned outdoor', and explained 30,3% of the total variance, with a Cronbach's alpha value of 0,756. The first factor described respondents who are highly interested in experiencing wilderness and nature and like to experience this in an unstructured or non-determined way. The second factor was labelled 'Learned locality' which explains 10,9% of the total variance, with a Cronbach's alpha value of 0,790. The second factor describes respondents who are highly interested in learning and exploring novel and unique local cultural events and nature based customs, and actively search for cultural-historic sites or learn about local histories. The third factor was labelled 'Social travelling', which explains 10% of the total variance, with a rather low Cronbach's alpha value of 0,518. This factor describes respondents who prefer to engage and exchange their experiences with others travellers or friends and relatives. The last and fourth factor was labelled 'Relaxed escapism', which explains 6,9% of the total variance and contain a single statement. This fourth factor describes respondents who enjoy breaking up their daily routine and relax. Since only a single statement was included here a measure of consistency between statements is not available.

Table 3: Factor analysis results

Factors	Factor loading	Cronbach's α	Variance explained
Factor one: <i>Unconditioned outdoor</i>		0,767	30,3%
I want to be able to experience solitude and immerse myself in the beauty of nature	0,82		
I enjoy the outdoors and wilderness	0,78		
I prefer wilderness observation to physical activity	0,71		
I enjoy travel off the beaten track	0,55		
I want the outdoors to challenge me	0,54		
Factor two: <i>Learned locality</i>		0,756	10,9%
Trying and tasting local cuisine is a must when travelling	0,76		
I want to buy local products from places I visit	0,75		
I find exposure to local customs, routines and rituals revitalizing	0,68		
I actively seek new travel experiences	0,52		
I prefer to study my destination before visiting	0,51		
I think it is important to experience the history and culture of the destination that I visit	0,47		
Factor three: <i>Social travelling</i>		0,518	10%
I want to share my travel experiences through social media	0,79		
I enjoy the company of other tourists when travelling	0,75		
Factor four: <i>Relaxed escapism</i>		N.a.	6,9%
When travelling I enjoy relaxing and getting away from my daily routine	0,89		

4.3 Cluster analysis

A cluster analysis was applied to the four factors to classify tourists into mutually exclusive groups. The analysis was performed using a K-Means clustering procedure. Trials analyzing three, four, and five clusters were conducted, and the results were compared to identify the most appropriate number of clusters. Based on the results of the analyses for three to five clusters, the three cluster solution appeared to be the most appropriate in terms of cluster interpretation and meaningfulness. The mean value was used as the base for interpreting and naming the clusters. Mean values above 3.00 indicate that a tourist personality traits attribute is important, while mean values below 3.00 indicate that the attribute has low importance. Table 4 shows the result of the cluster analysis. The total number of respondents (n=1.135) were grouped

into three clusters: Indifferent travellers (24%), Solitary cultural outdoor travellers (36%) and Social cultural outdoor travellers (40%).

Table 4: summary statistics cluster analysis

	Cluster 1 (n=273, 24%)	Cluster 2 (n=401, 36%)	Cluster 3 (n=453, 40%)	F-test	p- value
<i>Cluster name</i>		Solitary cultural outdoor traveller	Social cultural outdoor traveller		
Unconditioned outdoor	3,15	3,79	4,05	182,296	< .001
Learned locality	3,60	3,98	4,23	115,677	< .001
Social travelling	2,71	1,99	3,73	846,466	< .001
Relaxed escapism	3,31	4,59	4,54	460,499	< .001

^aMean values measured on the basis of 5-point Likert scale (1: strongly disagree, 3: neutral, 5: strongly agree).

The first cluster, the indifferent traveller (24%, n = 273), was characterized by relatively neutral score on three of the four factor dimensions. Only the *learned locality* factor is scored as moderately important (3,60). These potential visitors are rather indifferent to local culture and nature. They moderately value experiencing untamed nature and solitude, or learning about local natural costumes. They also seem rather indifferent to engaging with other travellers. The second (n=401, 36%) and third cluster (n=453, 40%) represent both potential visitors to Iceland that are interested in exploring outdoor and wilderness and simultaneously want to get in contact with local culture and learn from local histories, although the *social cultural outdoor traveller* has significantly higher mean value scores on the factors unconditioned outdoor and learned locality. For the member of both clusters, escape from their daily routine and enjoying a relaxing holiday constitute important motivations to travel. What distinguish these two clusters from each other is that the *social cultural outdoor traveller* enjoys meeting other travellers and they like to share their travel experiences while the *solitary cultural outdoor traveller* cluster prefers to refrain from these social activities.

4.4 Discriminant analysis

A discriminant analysis was applied to validate the results of the cluster analysis (table 5). The analysis examined the differences among the three clusters and determined variables that differentiate these clusters. Two statistically significant discriminant functions were calculated. All four personal trait factors significantly affected the group membership. In function 1, explaining 54,6% of the variance (eigenvalue = 1,404), *Unconditioned outdoor* and *social travelling* factors had the most power in the differentiating the *Indifferent traveller* cluster from the other two, whereas function 2 discriminated the *Solitary cultural outdoor* cluster with the other clusters almost entirely in terms of the *Social travelling* factor. In total, the classification matrix indicated that 97,4% of the three clusters were correctly classified, presenting a very high accuracy rate.

Table 5: Results of discriminant analysis of activity-based clusters

Discriminant function	Eigenvalue	Percentage of variance	Canonical correlation	Wilk's λ	χ^2	df	Sig.
1	1,404	54,65290534	0,76419679	0,192167	1856,32	8	< .001
2	1,165	45,34709466	0,733527587	0,461937	869,2217	3	< .001
Discriminant loading		Function 1			Function 2		
Unconditioned outdoor		0,742			0,106		
Learned locality		0,713			0,318		
Relaxed escapism		0,319			0,137		
Social travelling		-0,245			0,964		

Note: 97.4% of original grouped cases correctly classified; 99.1% of cross-validated grouped cases correctly classified.

In order to examine further the profile of these respondent groups, each cluster was cross-tabulated with external variables such as the socio-economic profile of the respondents, different travel behaviour variables, and their use of media and interested leisure activities. The differences were analysed for statistical significance using chi-squared tests.

4.5 Socio-economic profile

The socio-economic background data presented in table 6 provides information on respondents' gender, age, family status, education, household income, township and country of residence. Only socio-economic data that significantly differs statistically among two or all clusters are presented here. There is a significant difference among the clusters (p -value $< 0,01$) on all social-economic background indicators except *Gender* and *Income status* which are significant at a 0,05 level. Looking at the clusters individually, the most significant difference between the clusters' socio-economic profiles are as follow:

The *indifferent travellers* are in majority male (55%) with an average age of 43,4 years, strongly represented by the age-group 45-64 (41%). This cluster has the highest percentage of respondents without children (43%). Significantly different to the other clusters is the relatively high percentage of moderate or low education level of the cluster members (27%). Furthermore, the largest segment of this cluster (29%) has an income between €25.000-49.999 / £20.000-39.999 and lives in small cities or medium sized towns (41%) but have a significant larger segment of respondents that life in large cities (35%) in comparison with the other cluster (respectively 23% and 32%). In addition, a slight majority of the *indifferent travellers* lives in Germany (56%).

The *solitary cultural outdoor travellers* have a slight majority of female respondents (54%) with an average age of 46,2, the highest average age of all three the clusters. The dominant age group is 45-64 (42%) and the solitary cultural outdoor travellers have the largest 65+ group of all clusters (14%). Furthermore, this cluster has the highest percentage of respondents with children (72%) and contains the biggest segment of respondents with a university degree (45%). The *solitary cultural outdoor traveller* cluster has the lowest percentage of respondents with a year income lower than €50.000/£60.000 (41%) in comparison with the other clusters. In addition, this cluster has significant more people which place of residence is a rural area or village (29%) in comparison with the other clusters and are in majority from Germany (56%).

In the last cluster, the *social cultural outdoor traveller*, the majority of the respondents are females (55%) with the youngest average age of all cluster: 40,4 years. This relatively largest age group is 25-44 (41%) while this cluster has the highest percentage

of respondents younger than 34 years old (42%) in comparison with cluster *indifferent travellers* (33%) and solitary cultural outdoor traveller (30%). This *social cultural outdoor traveller* has a relatively high percentage of people with a university degree (45%). However, this cluster has as well the highest percentage (25%) of people with the lowest income level (< €25.000/£20.000) in comparison with the other two clusters. Another notable difference between the *social cultural outdoor traveller* and the other segments is the country of residence, a relatively large majority of the members of this cluster lives in the UK (61%).

Table 6: Socio-economic profiles of each cluster

	Cluster 1	Cluster 2	Cluster 3	P value
	Indifferent traveller	Solitary cultural outdoor traveller	Social cultural outdoor traveller	
Gender				0,027
Male	55%	46%	45%	
Female	45%	54%	55%	
Age groups				0,002
Younger than 20 years old	5%	4%	4%	
20 to 24 years old	13%	8%	15%	
25 to 34 years old	15%	18%	23%	
35 to 44 years old	17%	13%	18%	
45 to 54 years old	21%	20%	14%	
55 to 64 years old	20%	22%	17%	
65 years or older	10%	14%	9%	
Age mean	43,4	46	41	0*
Children				0,0
No	43%	28%	31%	
Yes	57%	72%	69%	
Highest education level				0,008
No formal education	1%	1%	0%	
Primary school	2%	1%	2%	
Secondary education	24%	13%	17%	
Post-secondary non tertiary education	37%	44%	36%	
University first degree	24%	27%	31%	
University higher degree	11%	15%	14%	

Income status**				0,03
< €25.000 / < £20.000	19%	17%	25%	
€25.000-49.999 / £20.000-39.999	29%	24%	26%	
€50.000-74.999/ £40.000-59,999	14%	17%	15%	
€75.000-99.999/ £60.000-79,999	9%	8%	9%	
€100.000-149.999/ £80.000-124.999	4%	6%	4%	
€150.000-249.999/ £125.00-199,999	1%	2%	2%	
> €250.000 / > £200.000	1%	0%	0%	
Don't know/ prefer not to say	22%	25%	19%	
Place of residence				0,001
Large city	35%	23%	32%	
Small city or medium-sized town	41%	48%	47%	
Rural area or village	24%	29%	21%	
Country of residence				0,0
UK	44%	44%	63%	
Germany	56%	56%	37%	

*P-value of a one-way ANOVA test, ** at the time the data was collected (April 2016) the currency relation between Euro and British Pound Sterling was €1 = £0,78 (www.poundsterlinglive.com)

4.6 Travel behaviour profile

Another profiling of each cluster analysed general travel behaviour of the respondents (table 7). The results show that there were statistically significant differences (on a P-value < 0,01) among the clusters on all travel behaviour issues except the question regarding respondents' previous travel to Iceland.

The *Indifferent traveller* has a significant higher percentage of respondents who have visited Iceland before (35%). However, their propensity to revisit places, chatting with locals and taking longer rather than shorter holidays is significantly less than the *Solitary cultural outdoor traveller* and the *Social cultural outdoor traveller*. They consider chatting with local people of moderate importance, significantly less important than the other clusters. In addition, the results show that a relatively high

percentage of the *Indifferent traveller* (55%) seldom to never choose to travel in groups.

In comparison with the other clusters, the *Solitary cultural outdoor traveller* is between the other clusters concerning the propensity to re-visit travel destinations (49% always-often), chatting with local people (53% always-often), taking longer rather than shorter holidays (33% always-often) and in terms of having never visited Iceland before (75%). An exception to this middle ground is their choice for group travel. The *Solitary cultural outdoor traveller* cluster has significant higher percentage that never (40%) chose to travel in groups compared with the other clusters (respectively 23% of *Indifferent traveller* and 14% of the *Social cultural outdoor traveller*).

Overall, the *social cultural outdoor traveller*, conducts the stated travel behavioural issues significantly more frequent than the other two clusters. The *social cultural outdoor traveller* revisit places they like (57% always-often), think it is important to chat with local people during their travel (66% always-often), travel in groups (23% always-often), and take longer rather than shorter holidays (47% always-often). Regarding their previous visit to Iceland, they show similar results as *solitary cultural outdoor traveller*, a relatively high percentage has never visited Iceland (76%).

Table 7: Travel behaviour of each cluster

	Cluster 1	Cluster 2	Cluster 3	P value
	Indifferent traveller	Solitary cultural outdoor traveller	Social cultural outdoor traveller	
<i>Travel to Iceland before</i>				0,003
Yes, once	21%	17%	18%	
Yes, twice or more	14%	8%	6%	
No	65%	75%	76%	
<i>I revisit places I like</i>				0
Always	7%	17%	19%	
Often	38%	32%	38%	
Sometimes	42%	40%	34%	
Seldom	9%	10%	8%	
Never	1%	1%	0%	
Don't know	3%	0%	1%	
<i>Chatting with local people is always important when travelling</i>				0

Always	10%	18%	30%
Often	28%	35%	36%
Sometimes	47%	39%	28%
Seldom	10%	7%	3%
Never	1%	1%	2%
Don't know	4%	0%	1%
<i>Group travel is my choice</i>			0
Always	1%	1%	8%
Often	9%	4%	15%
Sometimes	29%	19%	36%
Seldom	32%	36%	26%
Never	23%	40%	14%
Don't know	5%	1%	1%
<i>I usually take longer rather than shorter holidays</i>			0
Always	4%	9%	15%
Often	24%	24%	32%
Sometimes	46%	42%	38%
Seldom	19%	19%	14%
Never	3%	4%	0%
Don't know	5%	1%	2%

All differences across clusters are significant at the 0,01 level

4.7 Leisure activity preferences

Another variable that profiles the different clusters concerns preferred leisure activities. Respondents in the original survey were asked to indicate all the leisure activities that they conduct on a regular basis from a list of 29 proposed activities including an open response option. The eight most frequent performed leisure activities are; book reading (60%) followed by gourmet/fine food (35%), cycling (30%), hiking (29%), photography (27%), health/natural foods (25%), science/new technology (24%) and running/jogging (24%). When these leisure activities are compared across clusters, observed differences among these popular activities were almost all statistically significant (except the activities cycling and running which are not included in table 8). At an overall level, the respondents from the cluster of *Indifferent traveller* show a significantly lower activity rate on all the popular leisure activities compared to respondents in the other two clusters. I.e. a significantly higher percentage of respondents of *Indifferent traveller* (11%) indicated that they do not enjoy any particular leisure activity on a regular basis compared to the percentage of respondents from the two other clusters (respectively 2% and 4%). Comparison between *Solitary*

cultural outdoor traveller cluster and *Social nature culture travellers* cluster reveals that the *Solitary cultural outdoor traveller* distinguish themselves by having a significantly higher participation rate of book reading, gourmet, hiking and science/new technology, while the *Social nature culture travellers* conduct more frequently the leisure activities health/natural foods and photography.

Table 8: Percentage of leisure activities conducted on regular base per cluster and total sample.

Activities conducted on regular base	Cluster 1 Indifferent traveller	Cluster 2 Solitary cultural outdoor traveller	Cluster 3 Social cultural outdoor traveller	Total sample
Book reading	52%	68%	59%	60%
Gourmet/fine food	31%	39%	33%	35%
Hiking	22%	34%	28%	29%
Photography	19%	25%	32%	27%
Health/natural foods	13%	27%	30%	25%
Science/new technology	17%	28%	25%	24%
Do not enjoy particular activity on regular base	11%	2%	4%	6%

All differences across clusters are significant at the 0,01 level

4.8 Media use profile

Finally, this study examined if the clusters identified differ in terms of their members' use of media. From a list of different conventional and social media sources, the respondents in the original survey were asked to indicate how frequently they consume the particular media item. At an overall level, the most frequent used media source was television, 71% of all respondents use television 1 or more times a day, followed by online websites (63,4%), radio (59,1%), Facebook (58,3%) and newspapers (35%). When looking at the usage frequency through the identified clusters, the observed differences among the media source use per cluster were in most cases statistically significant (p -value < 0,01) except for the media sources newspaper and radio. Table 9 shows the statistically significant differences in media usage frequencies per cluster.

Table 9: Media use of each cluster

	Cluster 1 Indifferent traveller	Cluster 2 Solitary cultural outdoor traveller	Cluster 3 Social cultural outdoor traveller
<i>Magazine</i>			
3 or more times a day	1%	2%	4%
1 to 2 times a day	11%	4%	11%
Every other day	17%	8%	12%
1 to 2 times a week	24%	21%	17%
Less than weekly	34%	49%	40%
Never	14%	15%	16%
<i>Television</i>			
3 or more times a day	21%	19%	28%
1 to 2 times a day	44%	52%	49%
Every other day	16%	10%	12%
1 to 2 times a week	8%	8%	4%
Less than weekly	8%	5%	5%
Never	3%	5%	3%
<i>Radio</i>			
3 or more times a day	16%	24%	22%
1 to 2 times a day	36%	37%	40%
Every other day	16%	7%	12%
1 to 2 times a week	15%	10%	10%
Less than weekly	11%	13%	8%
Never	5%	9%	8%
<i>Online sites</i>			
3 or more times a day	26%	29%	37%
1 to 2 times a day	32%	31%	34%
Every other day	17%	12%	11%
1 to 2 times a week	8%	10%	8%
Less than weekly	10%	12%	5%
Never	7%	5%	5%
<i>Youtube</i>			
3 or more times a day	7%	6%	16%
1 to 2 times a day	17%	11%	16%
Every other day	18%	14%	15%
1 to 2 times a week	21%	19%	22%
Less than weekly	25%	35%	22%
Never	12%	14%	8%
<i>Facebook</i>			
3 or more times a day	29%	25%	48%
1 to 2 times a day	25%	17%	27%
Every other day	12%	6%	6%
1 to 2 times a week	10%	8%	8%
Less than weekly	7%	10%	4%
Never	17%	34%	7%

<i>Twitter</i>			
3 or more times a day	7%	4%	13%
1 to 2 times a day	13%	6%	13%
Every other day	10%	4%	7%
1 to 2 times a week	7%	5%	8%
Less than weekly	11%	10%	13%
Never	53%	71%	46%
<i>Instagram</i>			
3 or more times a day	5%	2%	10%
1 to 2 times a day	9%	5%	13%
Every other day	7%	2%	5%
1 to 2 times a week	10%	2%	7%
Less than weekly	10%	6%	12%
Never	60%	82%	54%
<i>Blogs</i>			
3 or more times a day	2%	3%	3%
1 to 2 times a day	5%	5%	7%
Every other day	8%	4%	7%
1 to 2 times a week	8%	7%	10%
Less than weekly	21%	18%	23%
Never	57%	64%	50%

Overall, the cluster Social cultural outdoor traveller uses social media sources most frequently, followed by the Indifferent traveller. The solitary cultural outdoor traveller uses social media source least frequently with a large majority who never used social media sources such as Blogs (64%), Twitter (71%) and Instagram (82%). For example, regarding the use of Facebook on a daily basis there is a relatively strong contrast between Social cultural traveller (75% of whom use it daily) and the Solitary cultural traveller (42%) with the Indifferent traveller between both other clusters (54%). The differences between the clusters regarding conventional media use contrast significantly less. The proportion of respondents that read magazines sporadically (less than a weekly) or never is relatively higher amongst the Solitary cultural traveller (64%) than the other two clusters (respectively 48% of Indifferent traveller and 54% of the Social cultural outdoor traveller) while the extensive use of television (1 or more times a day) is marginally higher by Social cultural outdoor travellers (77%) than the other two clusters (65% of Indifferent traveller and 71% of Solitary cultural traveller).

5. Discussion and conclusion

This report details a segmentation study of potential visitors to Iceland on the basis of identified personality characteristics of the “slow adventurer”. The study identified three distinctive clusters emerging from an analysis of AIO statements deemed to correspond with the identified personality characteristics of the “slow adventurer”. These three were named: *social cultural outdoor traveller*, the *solitary cultural outdoor traveller* and the *indifferent traveller*. The identification of differences in the socio-economic background, travel behaviour, leisure conduct and media-use between these three clusters further strengthened their distinction. Furthermore, the results of this study made clear that there is a large segment of potential travellers to Iceland that exhibit all or at least most of the slow adventure characteristics.

The *social cultural outdoor traveller* can arguably be considered the key slow adventurer segment. The mean values of all slow adventure personality trait was above 3,72 in the case of this cluster. This is the largest cluster (40%) and its members revealed a particular interest in experiencing and immersing themselves in untamed nature and enjoying the challenges of the outdoor in a non-structured fashion. The members of this cluster are interested in learning about localized customs and history and participate in local events. Escapism from their busy lives is an important motive for them to travel during which they like to share their experiences with others in person or by means of social media. This cluster consists for a considerable part of young adults between 20-34 years old, highly educated but having on average lower income than the other clusters. The *social cultural outdoor traveller* likes photography and natural foods. They are prone to taking longer rather than shorter holidays and are highly interested in chatting with local people when they are travelling. A considerable majority of the *social cultural outdoor traveller* lives in UK and are frequent users of social media (Facebook, Twitter and Instagram).

The *solitary cultural outdoor traveller* has many similarities with the *social cultural outdoor traveller* regarding experiencing the outdoors and wilderness. However, the main significant difference between the two clusters is the factor social travelling. The *solitary cultural outdoor traveller* does not prefer the company of other tourists during their travel or share their experiences on the spot or through social media. A large

majority of this segment seldom to never choose to travel in groups. Similar to *social cultural outdoor traveller*, however, this cluster has a strong interest in revisiting places they like. The *solitary cultural outdoor traveller* is the second largest segment and consist for a considerable part people of an age above 45 years (56%), who mostly have children and attained higher education. A substantial group of *solitary cultural outdoor traveller* lives in rural areas in comparison to the other clusters although the majority lives in urban areas. They are active in book-reading, gourmet and hiking. In contrast to the other clusters they use significantly less social media.

The *indifferent traveller* is the smallest segment (24%) and includes those who least identify with the characteristics of the slow adventurer. This cluster only showed a mean value higher than 3,50 on the factor about learned locality. The age of those in this segment is mostly above 45 years but a considerable part of *indifferent traveller* is without children. A majority of *indifferent traveller* attain a middle to high education level. This cluster has the highest percentage of those who live in large cities. The *indifferent travellers* are the least interested among the clusters in revisiting places, chatting with local people and taking long holidays above short ones. Furthermore, the *indifferent traveller* conducts significantly fewer leisure activities on a regular basis and uses less the mainstream media sources such as television and magazine than the other clusters.

This research suffers from some limitations that need to be addressed. The most important limitation is that this research obtained data from a consumer survey that was not developed with the objective to identify and typify slow adventure travellers *per se*. Therefore, in this research we had to use predefined general AIO statements that related to Iceland in general as a destination. A significant improvement for further slow adventure segmentation studies would be to develop a psychographic visitor survey that is developed on basis of slow adventurer characteristics and attributes. Furthermore, the sample of respondents consisted of potential visitors to Iceland who live in the UK and Germany. The study used was an exploratory one meant to refine the general AIO questions used and piloted in these countries. With respondents from only two countries queried general statements concerning the slow adventure segments among international visitors to Iceland can be drawn. Furthermore, as the

research revealed that the country of residence is a significant factor profiling visitor clusters, a sample from a more international set of countries would contribute positively to a better insight into the possible presence and characteristics of slow adventure tourists in Iceland.

Acknowledgement

The authors wish to thank Helgi Guðmundsson for his support in the statistical analysis of this research.

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December 2016