



ICELANDIC TOURISM
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Tourism Development in North Iceland

The issues of
Seasonality and Image Production

Lusine Margaryan and Nikolay Zherdev

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Publisher: Icelandic Tourism Research Centre, Borgum v/ Norðurslóð, IS-600 Akureyri
Tel: (+354) 460-8930
Fax: (+354) 460-8919
e-mail: edward@unak.is
Web: www.rmfi.is

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INTRODUCTION

Once regarded as inhospitable places in terms of climatic conditions, peripheral Nordic regions, coupled with niche market tourism development, have turned into popular tourism destinations. This e.g. is reflected in the growing number of cruise ship arrivals to North Atlantic ports and air passengers, landing in ever remoter airports by means of direct charter flights (Hall and Saarinen, 2010). The term ‘Nordic’ refers to the countries of northern Europe, on and around the Scandinavian Peninsula in addition to the North Atlantic islands. The countries are Denmark, Iceland, Norway, Sweden and Finland as well as the associated territories of Greenland, Faroe Islands and Åland Islands (Hall, Müller and Saarinen, 2009). Regions peripheral in the Nordic context are mostly found in the Northern parts of the named countries.

According to Statistics Iceland (2010), the domestic tourism consumption in Iceland, produced 11,5% of the total GDP in 2008. Therefore, and with an ever growing number of arrivals at Keflavík airport, many regard tourism as a potential way of furthering economic diversification, especially in light of the recent global financial crisis that had immense negative impact on the Icelandic economy and trade. However, as Johannesson, Huijbens and Sharpley (2010) note, the tourism industry has arguably reached a critical point in its development. One of the reasons cited for this is the spatio-temporal concentration of tourist flows within the country, or what is commonly referred to as seasonality.

The growth of tourism worldwide continues unabated, to the extent that tourism, as part of the consumer culture in modern Western economies and increasingly worldwide, has been acknowledged to powerfully generate and reproduce cultural and environmental discourses (Norton, 1996). It has also been argued that current tourist consumption is overwhelmingly ‘sign-driven’, and creation and consumption of images has become an indispensable part of the whole tourist process (MacCannell, 1976). In other words, tourist places are embedded in ‘consumer culture’ and their images have become subject to perpetual construction and manipulation via different marketing media. Among the different media utilized by tourism marketing stakeholders, tourist brochures are probably the most ubiquitous and rich with photographic images (Hunter, 2008: 357). The brochures, obviously, aim to create a positive and attractive image of a place, motivating tourists to choose one place over another as their travel destination. Apart from that, however, images are capable of conveying what Edelheim (2006: 5) calls ‘hidden messages’, i.e. simultaneously reinforcing certain hegemonic discourses, existing within a particular society. This suggestion, however, should not be understood as an exposure of ‘hidden agendas’ of the brochure producers, but rather as an attempt to draw closer attention to the taken-for-granted views and ‘self-evident truths’, existing in the society and how these can often be problematic.

This report, therefore, takes on the challenges of tourism seasonality in Iceland within the context of the (re)production of discourses identifiable through the images of tourist places and analyses them with the help of semiotics as deployed within tourism research. The main goal of this report is to explore both the issues of seasonality in North Iceland and its tourist images and see how they interconnect. In other words, what are the main specifics of seasonality in North Iceland, the predominant images of North Iceland in general and whether seasonality is being tackled in the tourism marketing messages, e.g. delivered via brochures.

To achieve this goal, three methodological approaches were utilized: survey, content/semiotic image analysis and participant observations. A special winter survey, in the context of this

project was conducted in March 2011 among tourists leaving Akureyri by airplane on an international charter flight to the Faroe Islands. The results were later compared with a survey, conducted in the summer of 2010 (and partially that of 2011) amongst departing passengers on international scheduled flights to Copenhagen to expose seasonal differences. Content/semiotic analysis was conducted on images in the tourist brochures of North Iceland. The focus was on the imagery of tourist brochures, promoting North Iceland as a tourist destination. Despite existing analysis of the marketing and tourist images of Iceland in general (Gren and Gunnarsdóttir, 2008; Gunnardóttir, 2011; Huijbens, 2011), regional representations have not been paid thorough attention to. The study aims to reveal and critically analyse the dominant themes present within the imagery of North Iceland and contribute to the improvement of tourist marketing in the region. The sample covers the majority of all brochures focusing on North Iceland freely available in the main touristic spots in that part of the country. In addition, this study to some extent includes comparisons with imagery used for marketing of other regions of Iceland. Relevant participant observations and personal communication with tourists visiting this region are also incorporated into the study. In order to gain insight into tourist experiences and first-hand impressions about tourism in North Iceland several participant observations were conducted in different tourist sites around North Iceland.

The report proceeds in six chapters. The first details the threefold methodology used in the project here reported. The second chapter explains tourism development, issues and challenges in Iceland and the following chapter deals with North Iceland in that context in particular. The fourth chapter details the analysis of brochure imagery in North Iceland tourism brochures. The fifth chapter reports on the visiting winter tourists to Akureyri. The following chapter makes a comparison between those arriving in summer and those arriving in winter to Akureyri. Lastly conclusions are summarised.

The project is conditioned by the contents of the authors' internship project, which took place from March to December 2011 at the Icelandic Tourism Research Centre in accordance with an agreement with the University of Wageningen, the Netherlands, where the authors were completing an MSc programme in Leisure, Tourism and Environment.

CHAPTER 1. METHODOLOGY

1.1 Winter survey

The main objective of the winter survey was to obtain information on visitors to Akureyri, their needs and expectations, in order to improve visitor services in North Iceland in future. The survey was conducted among tourists who came by direct charter flights from the Faroe Islands to Akureyri in March 2011, organised by the travel agency Tur (www.tur.fo) in cooperation with Akureyri Travel (www.aktravel.is). Two groups of Faroese tourists were approached: the first group had a flight scheduled on the 6th of March, 2011 (98 people; 64 adults, 34 children under 12 years old). The second group had a flight on the 13th of March (95 people; 74 adults and 21 children under 12 years old). These two visits were the second time tourists from the Faroe Islands came with a charter flight to Akureyri for skiing purposes. The first charter flight was organized in winter 2010 and was considered successful. The present tours consisted of a 4-day package, including transportation from/to the airport and hotel, transportation to the skiing area (Hlíðarfjall resort), accommodation at Hotel KEA (including breakfast and dinner for 2 nights) and an access card to the ski lifts.

The respondents were approached in Akureyri International Airport, before departure from Akureyri to Torshavn, Faroe Islands. A total of 71 questionnaires were collected. The survey method and structure of the questionnaire was based on the experience of a border survey conducted by the ITRC and directed at international air traffic passengers, departing on scheduled flights with Iceland Express in 2009, 2010 and 2011 (see: Bjarnadóttir and Helgason, 2010; Bjarnadóttir and Huijbens, 2011; Huijbens and Helgason, 2011b). The survey was adapted to this particular group of Faroese skiers, taking into consideration their activities, but excluding some of the questions from the original questionnaire as the information was already known beforehand (e.g. where they come from, where they have been staying etc.). The survey questions, which were formulated in Danish, can be grouped into five categories:

- Basic variables that form a visitor profile: gender, year of birth, level of education, level of income and travel companions (based on Cooper *et al*, 2005);
- General questions concerning the current trip to Iceland: prior visits to Iceland and purpose of visit (if other than skiing);
- Questions tailored to the activities experienced and skiing as the main purpose of visit: level of skiing experience, prior visits of Akureyri for skiing purpose, evaluation of travel experience, evaluation of skiing facilities and comparison of Hlíðarfjall resort to other skiing areas visited before.
- Questions concerning the stay in North Iceland: activities experienced in/outside of Akureyri, places visited outside of Akureyri, evaluation of what makes North Iceland an interesting destination, possibility of another visit to Akureyri in future and spending. The last aspect was approached by having respondents account several expenditure categories (food and beverages, groceries, recreation, shopping and souvenirs). Tourists were asked to mention the amount of money spent in each category and the number of dependent people.
- Questions regarding information sources used before and during stay in Akureyri.

Data from the returned surveys were analysed with the statistics software programme SPSS (20.0). The results are portrayed in the report by means of graphics along with textual

descriptions. In order to highlight the issue of seasonality the results of this survey were compared with the result of a previous survey, conducted in the summer of 2010. This was only a limited comparison, which nonetheless made it possible to pinpoint certain distinct season-based differences. It has to be added that a summer survey was also implemented in 2011, the analysis of which is implemented by Huijbens and Helgason (2011b) and is partially used in this report as well.

1.2 Image Analysis

The analysis of the images found in tourist brochures focuses on the region under the auspices of the North Iceland marketing bureau. Brochures in tourism promotion nowadays are merely one of many other marketing channels, aiming to influence the decision of potential tourists. With the development of IT and the escalating importance of the Internet, tourists are more and more influenced by official and non-official electronic marketing media (various travel websites, blogs, videos, photographs etc.). However, it can be claimed that brochures and other printed media still preserve certain importance since their quantity and availability does not seem to decrease (Hunter, 2008; Feighey, 2003). In the Icelandic context Gunnarsdóttir (2011) claims that national and regional marketing bureaus, as well as most of the travel agencies still spend considerable time and money on publishing tourist brochures which indicates that their importance and status cannot be dismissed.

The images and their context in the touristic brochures are here treated as ‘texts’, which broadly defined can refer to anything which has meaning. The texts, consequently, can be ‘read’, utilizing various analytical approaches. Here, the images of the North Iceland brochures are investigated with the help of two kind of analysis: a) content analysis and b) semiotic analysis, following the methodology used by Jenkins (2003) and Edelheim (2006). Combining the two provides a holistic and integral approach to analyse the meaning of images, but is, however, highly subjective and dependent on the positionality and cultural background of the researcher (Jenkins, 2003). This potential bias notwithstanding the aim of this two-fold analysis is to expose underlying trends, signs of significant omissions, typology and perennial themes within the tourist images of North Iceland.

The content analysis in this study is “a methodological technique for analysing photographs, concerned primarily with describing quantitatively the content or appearance of a group of photographs” (Jenkins, 2003: 312). This is achieved by coding each photograph based on their content into various categories (see Table 1). Grouping photographs into pre-defined categories inevitably invites the risk of oversimplification and bias, conditioned by the cultural background of the researcher. To mitigate this shortcoming, it is acknowledged that each image is a polysemic construct with multiple possible meanings, which can be used to question or support the message presented (Edelheim, 2006). Each picture from the brochures was numbered and a database was created, coding the content of them in accordance with the ascribed category. Each picture was put into one category based on the primary theme it depicts (though certain overlaps naturally exist). The statistics software programme SPSS (20.0) was used for this purpose.

The semiotic analysis in this study is applied to describe *how* the photographs represent what they aim to represent through semiotic description. Jenkins (2003) describes semiotic analysis as the investigation of the “content and composition of photographs and how these combine to communicate through signs and symbols various messages about the places they depict” (p.

314). Semiotic analysis can be viewed as an in-depth extension of the content analysis but at the connotative level, by supplying e.g. a subversive reading or at least a thick description of the sign content and underlying meaning (Graham, 2004).

The categories of the images are based on the main trends, already identified in the Icelandic image representation (e.g. Gunnarsdóttir, 2011) as well as trends, common to the Western tourist image creation in general (Edelheim, 2006; Jenkins, 2003).

Combining the content analysis and the semiotic extension, the research framework of the tourist images of North Iceland can be summarized in Table 1 as follows:

Table 1. The research framework of the tourist images

Categories	Aspects of interest	Possible signifiers
Nature in focus	calm, passive rough, active wildlife human impact	still water, meadows, mountains, glaciers geysers, volcanoes, waterfalls, puffins, whales, seals, horses, fish, plants no humans or human impact visible, 'pristine nature'
People in focus	gender age context	male, female children, young adults, elderly tourists, locals
Landscapes	setting, shooting method	aerial photos, rural/urban landscapes, 'tiny humans in vast nature'
Activities	passive active	relaxing, bathing, shopping, dining doing winter sports, hiking, rafting, horse-riding
Cultural heritage	material immaterial	churches, monuments, artefacts mythical or legendary characters, Vikings
Tourist-friendliness	tourist infrastructure and entertainment	hotels, restaurants, bars, trails, transport, theatres, concerts, museums

The brochure samples were collected from various tourist spots around North Iceland, mainly tourist information outlets, but also from accommodation providers, cafes, souvenir shops, in Akureyri, around Lake Mývatn, Goðafoss waterfall, as well as the library of the Icelandic Tourism Research Center in Akureyri. Besides, special attention was paid to the guide around Lake Mývatn (editions 2010, 2011 and 2012) and the Official Tourist Guide of North Iceland (editions 2010 and 2011) as these represent the most comprehensive tourist publication about the region. The sample includes 51 different publications, each containing multiple small and medium-sized photographs, representing different attractions of North Iceland (1922 images in total were processed).

1.3 Participant Observations

In order to gain a first-hand insight into the experiences of tourists as well as tourist workers in North Iceland, participant observation was deployed. Participant observation refers to research that involves social interaction between the researcher and informants in the milieu of the latter, during which data are systematically collected (Taylor and Bogdan, 1998). In contrast to other research methods, the research design in participant observation remains

flexible both before and throughout the whole research. However, the researchers had general questions in mind when they entered the field.

The participant observations were conducted by the authors on multiple occasions, including participation in the scheduled bus tours with tourists in the spring and autumn of 2011. During the observations, the authors paid attention to the behaviour, reactions of tourists on local sightseeing and towards tourist infrastructure and engaged in informal conversations with tourists and tourist workers. The tourists were observed and contacted in Akureyri, during the tours around Lake Mývatn, food-tasting tour on Hrísey Island and around Akureyri, during local events, such as Víðidalstungurétt (horse round-up) and others. Notes were taken during the observation process and these will be used below as applicable for personal reflections and vignettes.

CHAPTER 2. GENERAL ISSUES OF ICELANDIC TOURISM DEVELOPMENT

2.1 Background

Less than twenty years ago, Iceland was a little known destination on the periphery of Europe, a place that could be described as “moderately interesting for tourism” (Gössling and Hultman, 2006: 53). However, only in a five-year period of 1995-2000, the number of international tourist arrivals increased by an average of 11,7% per year, with a similar average annual growth between 2000 and 2010 to the tune of 7,4% (Huijbens and Helgason, 2011a).

It is repeatedly argued, that tourism is promising for the Nordic countries and, at times, the most sustainable and attractive industry for development, especially in peripheral regions, suffering in terms of population decline and industry restructuring (see Hall *et al.*, 2009; Høyer, 2000; Kaltenborn, Haaland and Sandell, 2001). Detailed studies, however, offer insights into how government committees, tourist agencies and other tourism stakeholders and developers in these countries face challenges regarding their tourist attractions, in particular places during particular times (Rannikko, 1999; Hall *et al.*, 2009). In other words, ‘seasonality’ is the key affliction of Nordic tourism, resulting in distinctive patterns of tourist visitation and high concentrations of visitor numbers in very few destinations. Whilst common in tourism worldwide, for the Nordic countries it is the key factor that influences tourism development.

According to the definition given by Butler (1994: 332) seasonality entails;

...a temporal imbalance in the phenomenon of tourism, and may be expressed in terms of dimensions of such elements as number of visitors, expenditure of visitors, traffic on highways and other forms of transportation, employment, and admissions to attractions.

Seasonality is one of the greatest challenges for tourism entrepreneurs, and can negatively impact social and ecological carrying capacities, causing underuse and overuse of resources. According to Butler (1994), the main reason for tourism seasonality is strong dependence on weather conditions: the drop in tourism arrivals during cold winter period in North America and unbearably hot summer season in the desert regions of North Africa become a significant trait of the local tourism industry. The other main reason Butler (1994) cites is dictated by the social scheduling of our society, i.e. existence of traditional holiday seasons.

2.2 Seasonality and Approaches to its Mitigation

Nordic tourism, much like elsewhere, highly depends on holiday periods and weather conditions. Moreover, due to constraints in accessibility, specific sites receive the bulk of visitations. So-called ‘mass tourism’ can be observed during a limited time period of the year (mostly June to August), during the high/summer season. In turn, the northern hemisphere has its low/winter season (October to April) and ‘shoulder’ season (May and September) as a somewhat transitional period between the high and the low seasons.

Although the problematic nature of seasonality is well-established, if not overemphasized, and is most often weather or climate related, other causes of seasonality are less clear and often place specific. Hinch and Jackson (2000) argue that much of the literature on seasonality fails to acknowledge the influence of both natural and institutional factors. Instead, they suggest, research on 'leisure constraints' besides harsh weather conditions or poor accessibility could be adopted in tourism in order to understand the nature of seasonal preferences in travel. Similarly, Butler (1994) recognizes other reasons for seasonal flows of tourists. First, he mentions 'institutional seasonality', which stems from school and business holidays. Moreover, he mentions social seasonality, which relates to social 'norms' of visiting particular destinations during specific seasons. The third set of reasons concerns sport seasons, which affect travel seasons in certain destinations. Furthermore, Butler (1994) speaks of 'inertia', meaning that people travel to certain destinations during specific seasons, simply due to tradition or habit.

Seasonality is also place specific, depending e.g. on the geographical location of a destination. As Hadwen *et al.* (2011) argue, institutional factors have their greatest influence on tourism in the sub-tropical climatic zone, while tourism seasonality in alpine and sub-alpine areas is caused by a complex interplay of natural and institutional factors.

As diverse as the reasons for seasonality can be, so too are the ways in which it is measured (Lundtorp, 2001). The most common measurement is the fluctuations of visitor arrivals and overnight stays. Another measure is visitor expenditure, which also can vary from season to season. The extent to which various forms of tourist activities interact (some perhaps negatively) with the environment can also be measured and framed as a seasonal phenomenon.

Trying to redress seasonality and develop an even tourism visitation rate, however, "is rarely a realistic objective given that radical transformation from a 4-month to a 12-month destination defies the reality of primarily, the weather" (Baum and Hagen, 1999: 300). A growing body of literature on seasonality in tourism sheds some light on how businesses and operations involved in tourism (either wholly or in part) respond to temporal fluctuations in visitor use, arrivals or expenditure (e.g., Bar-On, 1975; Butler, 1994; Baum and Lundtorp, 2001). These include pricing strategies, variedly-oriented attractions offered, low (or shoulder) season attractions promotion, staff recruitment changes and asking support from government officials, e.g. in facilitating industry co-operation (Lee *et al.*, 2008). According to Brewster *et al.* (2008), management responses to seasonality can be divided into three groups of organizational flexibility: *functional*, *financial* and *procedural*. The first group of actions relates to market operation during high and low seasons, the second concerns pricing strategies, while the third involves e.g. facilities limitation during off-peak seasons and staff reductions (Lee *et al.*, 2008). According to Lee *et al.* (2008), main strategies for addressing seasonality can be divided by four general strategy types:

- *Differential Pricing*: operated by application of discount offers, special financial planning and budgeting.
- *Diversified attraction*: promotion of festivals and events, infrastructure development, diversifying niche product and service areas.
- *Market diversification*: conducting off-season marketing campaigns to attract various markets, cooperation with other stakeholders to sell the product.

- *Facilitation by the state:* changing holiday periods, altering work regulations, marketing and financial support of tourism businesses, organization of events and festivals during off-season, development of local business networks.

As Commons and Page (2001) argue, if these actions are adopted in a reactive fashion they have almost no chance of tackling seasonality. However, more proactive approaches to the actions mentioned above are likely to have a certain influence on the length of shoulder seasons and reducing economic losses during off-peak periods.

More importantly, in order to tackle seasonality through strategies and their adoption, the involvement of various stakeholders should be included in the decision-making process. The responses need to take into account the local population. Hartmann (1986) notes how local residents can experience certain inconvenience with tackling seasonality issues and thus have reasons for not supporting it. According to McCool and Moisey (2001), high season expansion has a variety of negative social impacts, mainly overcrowding, noise and pollution during longer periods of time. Moreover, seasonality is related to the patterns that are stable and well-established in peoples' lifestyle, hence any changes should be regarded very carefully (Witt and Moutinho, 1995). At the same time, seasonal tourism creates unemployment issues during the off-seasons (Kreag, 2001) that can also impact local populations. Thus, any seasonality-tackling decisions should be properly weighted with regard to local residents.

2.3 Development of Destination Image

The growing number of travel destinations and, consequently, tourists' possible choices create many challenges for productive tourism marketing (Echtner and Brent Ritchie, 2003). According to Levitt (1986), marketing the destination image is the basic element of successful tourism marketing due to the tight connection between travel experiences and visitors' thoughts about any particular destination. As Echtner and Brent Ritchie (2003) argue, in order to be successfully promoted and subsequently visited, a destination should be positively positioned in the minds of potential visitors. This positioning process is based on the creation and management of a positive perception and attractive image of a specific destination (Calantone *et al.*, 1989). As stated by Woodside and Lysonski (1989), tourism destinations with strong positive images have a greater chance of being selected in the travel decision making process. Image has been proven to play a pivotal role in tourists' decision process and destination selection behaviour (Baloglu and Mangaloglu, 2001).

2.3.1 Importance of Image Development

Tourists' selection of a possible destination highly depends on the very early stage of image formation in their minds and first impressions (Gunn, 1988). Baloglu and McCleary (1999) argue that the process of image formation is shaped by two main forces: stimulus factors and personal factors. The former relates to the external incentives and precedent experiences, while the latter concerns social and psychological peculiarities of the perceiver. Thus, the concept of destination image should be regarded as "an attitudinal construct consisting of an individual's mental representation of knowledge (beliefs), feelings, and global impression about [...] a destination" (Baloglu and McCleary, 1999: 870). The different strengths and weaknesses of the existing image are important for those individuals, who have never visited a destination before (Echtner and Brent Ritchie, 2003). However, previous visitation of a

tourism destination is one of the most important factor influencing tourist's decision-making as it is *in situ* where the attitudinal construct is either confirmed or rejected.

Urry (2002; 2004) describes the tourist industry as the phenomenon that is formed around the tourist gaze, which is related to features of the landscape and the native population, available through films, photographs, postcards, and other forms of media. In the third edition of his book, Larsen and Urry (2011) add insights from the digitization of photographs, embodied performances and reflections on the politically aware consumer. The concept of the tourist gaze underlines how the presentation of an official image of a country is crucial for its tourism development, albeit inevitably a contested and convoluted process. The most important component of marketing messages is providing detailed information to possible visitors (Middleton and Clarke, 2001). This information can be represented by any form of printed or electronic information material. Moreover, there are several other unconventional sources, which could be used to convey this information in tourism marketing as well: various kinds of advertising and word-of-mouth (Beerli and Martin, 2002; Middleton and Clarke, 2001). Due to the diverse selection of marketing and promotion tools, tourism marketers should have a better understanding of the characteristics and potential effects of information and advertising materials (Gartrell, 1988).

2.3.2 Images of Iceland

In the promotion of Iceland as a tourism destination, a present challenge is finding the way to combine regional marketing and national marketing policies and thus make it more coherent and systematic (Johannesson *et al.*, 2010). However, the recent financial crisis had certain negative impact on the Icelandic tourism image and the government has aimed at limiting the damage to the image of the country with a plan on 'communicative defence strategies' (Huijbens, 2011). At the same time, the majority of stakeholders recognize the prominent role of the 'green' image of the island, having natural peculiarities as its main 'uniqueness' and thus tourist attractiveness. Nature indeed reigns supreme as the image of Iceland.

However as Huijbens (2011) recounts, in the last few years a concerted effort of marketing has been in terms of developing a nation brand, as opposed to the natural country brand reigning supreme. Underpinning a move towards a nation brand is what Pálsson and Dürrenberger (1996) describe as a certain change in the presentation of the Icelandic identity: the emphasis has moved to the local level of regions and villages, which present more 'informal' side of the country's identity, which is e.g. reflected in the number of regional marketing offices. However in the package of informality has come a reproduction of stereotypes.

A prime example of this stereotyping is the (in)famous marketing campaign of Icelandair, advertising a 'one night stand in Reykjavík'. The campaign was heavily critiqued by feminist scholars, as the latent message was the stereotype of Icelandic women as easy prey for the visiting guest. Alessio and Johannsdóttir (2011) relate the campaign to a noticeable shift in Icelandic tourism marketing tactics starting from the 1990s. During that time tourism was gaining in recognition as an alternative source of foreign revenue. With this recognition Iceland began to market itself as a new, exotic and exciting destination. Along with the natural landscape, hitherto and still dominating the promotional image, a different kind of attraction appeared, namely its "beautiful and supposedly promiscuous young women" (p. 36). Alessio and Johannsdóttir (2011) draw an interesting parallel between the tourism promotional discourse of Iceland and that of South-East Asian countries, in terms of

objectification of local women and supporting sex-tourism. This is, of course, quite paradoxical since the economic situation and the level of gender equality is practically beyond comparison. Personal communication with several male tourists (from Germany and France) confirmed that the topic of beautiful Icelandic women quite often appears in their encounters with the locals, and is often presented as something which 'has to be tried out' along with other 'must' activities in Iceland. The stress on depicting Icelandic women as a tourist attraction has become quite evident and has caused debates about the possible implications this trend can have for local tourism and the society in general.

Along similar lines of reasoning Schram (2011) coins the term 'borealism', an analogy of Said's (1979) 'orientalism', stressing similar tendencies to exoticize and mythologize Iceland as a part of 'mysterious North' in contrast to continental Europe and the US, through images of wild, rough nature as well as stressing such dishes as cured shark or sheep's head, which are perceived as 'pre-modern' or 'barbaric'. Schram (2011) also notes how this emphasis becomes part of 'performing North' for the foreigners by Icelanders themselves and through the playful irony and exaggeration creates new spaces for contact. During a trip in autumn 2011 marketed as 'local food and gourmet' by the North Iceland tour operator Saga travel, similar observations were made, while tourists were challenged to taste the cured shark and the brave connoisseurs received certificates of accomplishment.

Concomitant the post-1990s diversification of image strategies in Iceland is the proliferation of sparkling tourist images of Reykjavík, stressing its attractions as a city of nightlife, unrestrained parties, fashion and trendy music. Reykjavík is a key destination in Iceland and the country's only city, the greater metropolitan area houses almost two thirds of the country's inhabitants. The city is a 45 minute drive from the only international airport in the country, through which over 93% of in- and outbound tourism travels; Keflavík (Flugstoðir, 2009). Not surprisingly, the city has an active role to play in the constitution of the image of Iceland. Alessio and Johannsdóttir (2011) point out that the marketing effort to present Reykjavík as a 'Global Party Capital' has been very successful, indicative of which, according to marketing officials, is the international fame of the singer Björk, Airwaves music festival, and the popularity of the music band Sigur Rós. Personal communication with tourists in Iceland also indicate that pop-culture, notably the music of Björk, Sigur Rós, Emilliana Torrini as well as exposure to the films 'Heima' and '101 Reykjavík' were indeed quite influential for the decision of many young people from Europe, US and Canada to visit Iceland.

A particular brand of cultural tourism, developed to counter the dominant nature images of Iceland, builds on another tradition and long standing fame of Icelandic culture - the Sagas. The first settlers have now for marketing purposes been dubbed 'Vikings'. These have become a staple in what Kjartansdóttir (2011) calls the 'new Viking wave', indicating that the images of Vikings as representation of Iceland have gained renewed interest, compared to a long standing interest of foreign scholars in the matter, prompting them to visit the island. This refers thus not only to a brand of heritage tourism, following the trails of Sagas, but also to a broader context of framing Icelandic society and culture, with e.g. Icelandic business men referred to as raiding Vikings (I: *útrásarvíkingar*). Despite the still raging academic debates whether or not the term 'Viking' can be applied to the original Icelandic settlers, images of Vikings (as we imagine them) and Viking-related paraphernalia can be easily found in every souvenir shop. Also Viking villages, festivals and various Viking-themed events seem to proliferate (Kjartansdóttir, 2011). During an excursion around North Iceland, one of the local guides explained how he is well aware of the historical debates and possible inappropriateness

of the term, but he still prefers to refer to the Icelandic settlers as ‘Vikings’ during his excursions.

Despite the aforementioned new tendencies in diversifying the images of Iceland in an effort to re brand the country, nature still plays a very important role in its tourism promotion. In her research of the images of Iceland on the front pages of the *Iceland brochure* (an annual publication by Icelandic Tourism Board), Gunnarsdóttir (2011) argues that nature is undoubtedly the dominating theme. Nature has been heavily stressed as the main tourist attraction since the 1960s, usually playing with the contrasts of ice, lava, geysers and barren mountains, and emphasizing the purity and pristine scenic landscapes (Gunnarsdóttir, 2011). Furthermore, she stresses that there is a tendency to depict nature as “monotonous and passive...a place that waits for tourists to explore and there is no nuisance that will disturb” (*ibid.*: 539). In his analysis of the ‘Iceland Naturally’ marketing campaign, Huijbens (2011) points out that for the Iceland Travel Industry Association marketing of Iceland practically revolves around ‘untouched nature’ to be promoted via the aforementioned slogan (p. 559). Indeed, 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 (Sæþórsdóttir, 2010: 29).

North Iceland has become one of seven touristic regions of Iceland, and followed the city of Reykjavík closely in establishing its own regional marketing bureau. By now all the other regions have followed suite with Reykjanes Peninsula, South Iceland, West Iceland, East Iceland and West Fjords establishing the marketing bureaus. Each region is also represented in a separate tourist brochure, published annually. The regional tourist marketing offices operate in parallel with regional tourist information centres, without formal relations either with the information centres or with a number of smaller information outlets, run by smaller municipalities or operated privately (Johannesson, *et al.*, 2010). These marketing offices are targeted to promote the Westfjords (see: www.westfjords.is), the North (see: www.nordurland.is), the West (see: www.westiceland.is), the East (see: www.east.is), the South (see: www.south.is) and the capital region of Reykjavik (see: www.visitreykjavik.is). Recently, additional marketing offices were established for the Reykjanes peninsula and the Vatnajökull national park, the latter under the marketing campaign ‘In the Realm of Vatnajökull’ (Johannesson, *et al.*, 2010; Huijbens and Gunnarsdóttir, 2007). The marketing offices provide information specific to the region, promote main attractions and act as a lobbying group for regional tourism stakeholders.

In her overview of the front pages of the regional brochures, Gunnarsdóttir (2011) mentions that the key stakeholders in regional marketing do not have a clear idea of what kind of image of the region they want to promote. Most often the regions are presented as ‘miniature Icelands’, where all conventional Icelandic attractions can be found without any distinctive regional specifics. Obviously thus, nature plays the dominant role in the representations of the regional images as well, and the brochures are heavily populated with photographs of ‘untouched’ pristine nature (Gunnarsdóttir, 2011).

It can be safely argued that research on the images of Iceland so far has revealed several distinct themes dominating the imagery, which repeatedly appear in various touristic publications. Those are mainly natural landscapes (pristine and calm, but also wild and dramatic), Vikings and Saga-related themes, Icelandic women as well as vibrant urban life in

the case of Reykjavík. Images representing different regions of Iceland, with the exception of Reykjavík, are generally rather vague and blurred, with no clear emphasis on any unique characteristics. The tourist images of separate Icelandic regions, however, have not been thoroughly studied. The results of the image analysis of tourist brochures representing North Iceland are presented in Chapter 4 of this report.

CHAPTER 3. THE CONTEXT OF NORTH ICELAND

3.1 Background

The region of the North Iceland marketing bureau occupies approximately half of Iceland's territory, stretching from the village of Borðeyri in the west to Vopnafjörður in the east. However, the borders are rather conditional and do not follow any administrative division of the country (see Figure 1). Going from West to East the natural landscape is versatile, composed of plains and hills, mountains and lava deserts. Agriculture and fishing thrive in the villages along the coast.



Figure 1. North Iceland

Source: <http://www.northiceland.is>

According to Statistics Iceland (2010), the population of Iceland is approximately 318,000, with 70% living in the capital region. The rest of the population is primarily in fishing villages and towns along the coastline of the country, with Akureyri (population approximately 18,000) by far the biggest thereof. Throughout the 20th century the predominant trend has been constant migration to the Reykjavík region, causing concern for the government and prompting initiatives in cooperation with the locals to help keep people working in their own communities (Bjarnason and Thorlindsson, 2005).

As can be seen in Figure 2 'all the most exciting places in Iceland' are, according to Iceland Excursions, a Reykjavik-based bus tours operator, in the south-west of the country within the 'Golden Circle' region and the Reykjanes peninsula. This marketing, combined with the map below, downplays, if not outright rejects, the possibility of attractions in the island's peripheral regions. However, it also reflects the structure of the tourism industry in the country and the fact that the entry point of 93% of the visiting tourists is the Keflavík international airport on the tip of the Reykjanes peninsula. There is no doubt that this state of affairs only exasperates seasonality in other Icelandic regions.



Figure 2. The map of tourist routes of "Reykjavik Excursions".

Despite the region of North Iceland being peripheral to the centre of tourism growth in Iceland, the number of tourist arrivals there is growing rather steadily. Figure 3 demonstrates the increasing number of overnight stays by foreign tourists in North Iceland per year (Huijbens and Helgason, 2011b).

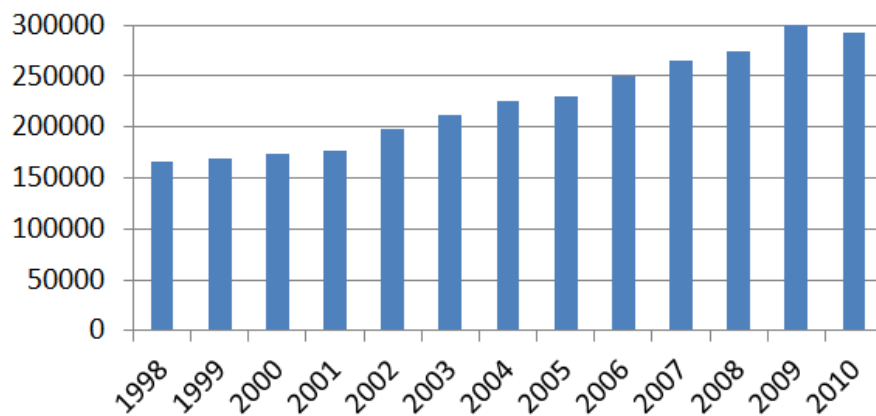


Figure 3. Number of bednights taken by foreign tourists in North Iceland per year

3.2 Seasonality in North Iceland

Using the bednight statistics from Statistics Iceland, but this time detailing them on a monthly basis, reveals the challenges of North Iceland compared to the capital region. Figure 4 compares bednights in the capital region with those of North Iceland in 2010 (Huijbens and Helgason, 2011b). It has to be noted, that only international tourists and only hotel/hostel accommodation are taken into account.

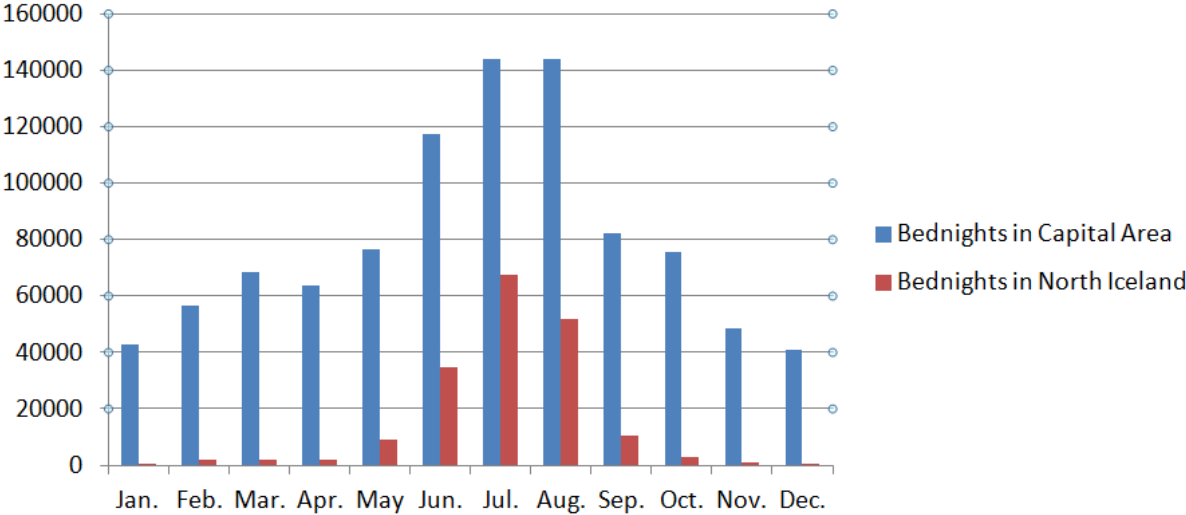


Figure 4. Number of bednights taken by foreign tourists in 2010 per month

As can be seen in Figure 4, albeit seasonality is an issue for Iceland in general, it is more pronounced in North Iceland. While the South-West capital region with its proximity to the international airport experiences a rather smooth transition from low to high tourist season, peripheral areas of the country experience abrupt changes in the number of tourist visitations between three high-season months (from June to August) and the rest of the year (Figure 4). Hence, it is possible to mention not only seasonality in terms of arrivals, but also seasonality in a spatial sense, regarding remoteness of regions, i.e. the further the region is from the capital and the main gateway to Iceland, Keflavík international airport, the more likely it is to suffer from pronounced seasonality. Thus, one of the most important challenges of tourism in the Icelandic regions is seasonality coupled with the issue of peripherality.

An even more drastic picture of seasonality (see Figure 5) can be seen when comparing the number of bednights among tourists who stayed in accommodation other than hotels and hostels (e.g. camping sites, farms, family and friends) (Huijbens and Helgason, 2011b). However, in this case, in terms of numbers there are more tourists in North Iceland (108.747) than in the capital area (102.591). It can be assumed, that many tourists who want to experience nature, camping and farm life prefer to move away from the capital area.

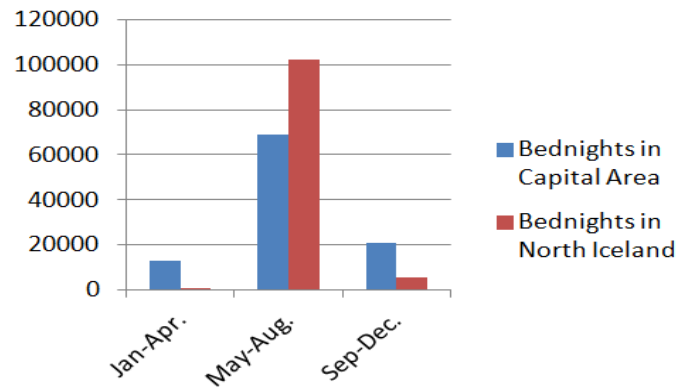


Figure 5. Number of bednights in other accommodations

It is possible to assume that the reasons producing the low season in North Iceland, on the most general level, are; the weather, transportation access and holidays. The common management response is to try and attract tourist groups during the off-season through e.g. market segmentation. But taking into account what Butler (1994) termed ‘institutional seasonality’, it is necessary to understand stakeholder participation and strategies in North Iceland that have been employed both successfully and unsuccessfully to mitigate the seasonal inequality. One of the most prominent strategies being deployed are destination promotion and image development.

3.3 Image Development in North Iceland

Information sources that tourists use before and during the trip play a key role for defining the most effective means of destination’s promotion. Though there are different dynamics in summer and winter, some sources of information are clearly dominating throughout the year. Those are internet, printed media (brochures, guidebooks) as well as the word of mouth.

Despite the ever growing importance of internet marketing, the surveys conducted in Akureyri airport in summer 2010 and winter 2011 reveal that touristic brochures and guidebooks still act as an important source of information for the tourists particularly during the trip, once they are in the area, and affect their decision to visit/not visit a particular attraction (see Figure 6 and 7).

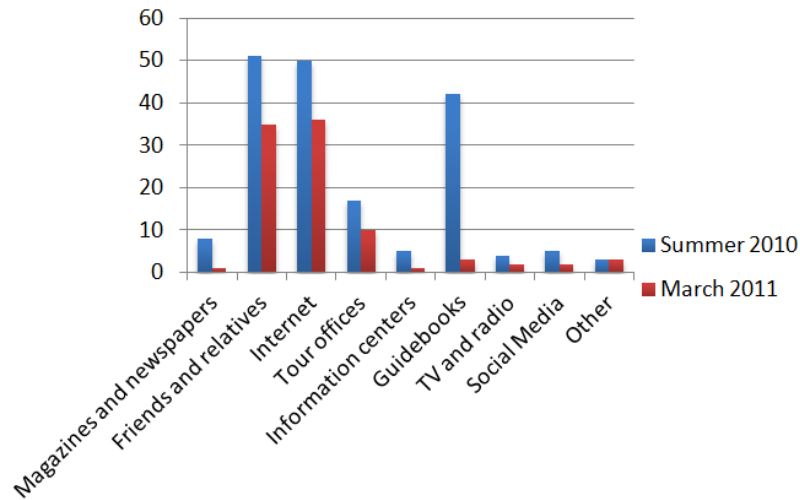


Figure 6. Information sources used prior visiting North Iceland

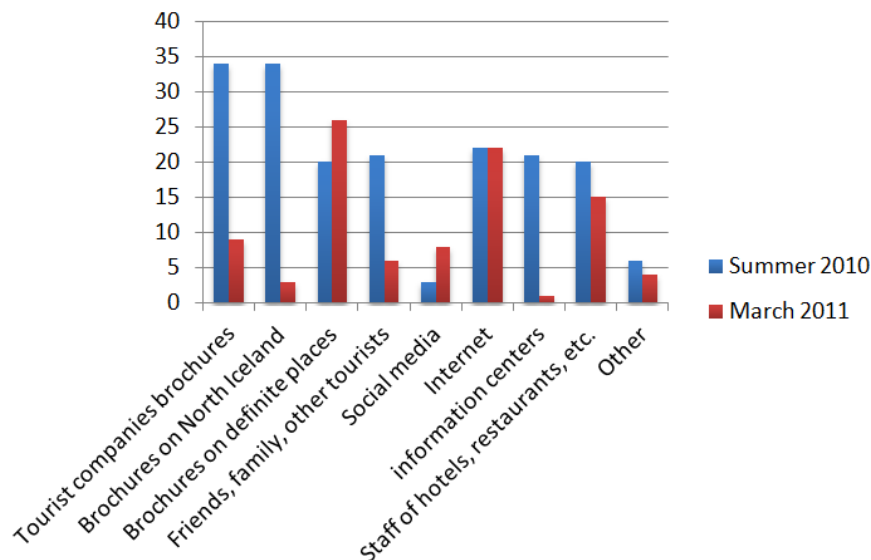


Figure 7. Information sources used while visiting North Iceland

An obvious avenue to mitigate seasonality would thus seem to reside within these marketing channels and therefore it is important to establish the current state of affairs when it comes to images being promoted. Despite existing analysis of the marketing and tourist images of Iceland in general (Gren and Gunnarsdóttir, 2008; Gunnardóttir 2011; Huijbens 2011), regional representations have not been paid thorough attention to. The next section aims to reveal and critically analyse the dominating themes present within the imagery of North Iceland. This will ultimately contribute to improvement of tourist marketing in the region.

The sample covers the majority of all brochures focusing on North Iceland freely available in the main touristic spots of North Iceland. In addition, this study also includes comparisons with imagery used for marketing of other regions of Iceland. Relevant notes from participant observations and personal communication with tourists visiting this region are also incorporated into the study.

CHAPTER 4. ANALYSIS OF PHOTOGRAPHS IN TOURIST BROCHURES OF NORTH ICELAND

4.1 Content Analysis

The content analysis, focused on images portrayed in the sample of brochures and their so-called extrinsic dimension, i.e. the messages that the images are overtly aimed to create. This analysis reveals six themes in the proportions presented in Figure 8.

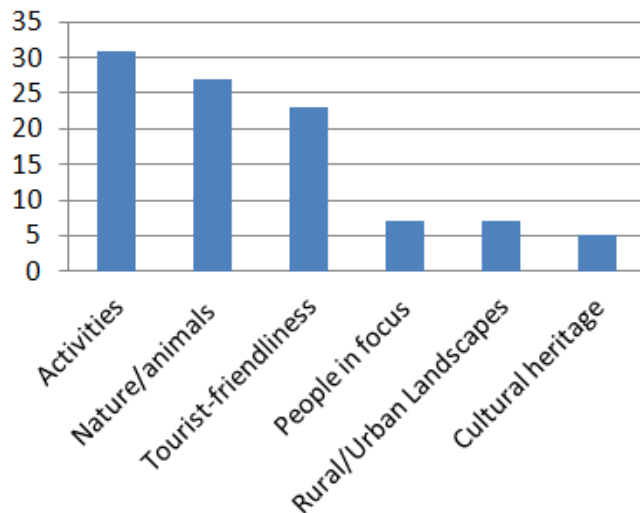


Figure 8. Composition of the images of North Iceland by main categories (in %)

Generally speaking, the majority of the photographs (31%) in the studied tourist brochures represent people engaged in various kinds of activities, almost all of them outdoors. About a fifth (18%) of these pictures represent active sports, namely (in the order of popularity) winter sports, hiking, horse riding, rafting, cycling and others. This list accounts for 87% of those pictures representing active sports, the remaining 13% depict comparatively passive and relaxing activities, of which the most popular are bathing, dining, and whale watching.

Of the more than quarter (27%) of pictures having nature and animals in focus, about a fifth (18%) represent the nature of North Iceland void of humans and human impact. Majority of these pictures (12%) depict what is labelled as ‘calm, passive nature’. The natural landscapes in these photos are very still, the day is usually bright and cloudless, the water seems motionless. Less than a tenth (6%) of these pictures represent ‘rough, active nature’, meaning that the natural elements depicted are powerful and even intimidating, such as powerful waterfalls, geysers, volcanoes, ocean waves, dramatic mountains, foggy and windy weather.

Of the more than quarter (27%) of pictures having nature and animals in focus, animals are the particular focus in 9% of the pictures. The most popular animals are the Icelandic horse, Atlantic puffin (*Fratercula arctica*), various species of cetaceans (generally referred to as ‘whales’) and the common seal (*Phoca vitulina*). Others mostly include farm animals in the farm settings and various kinds of birds, such as harlequin duck (*Histrionicus histrionicus*), Slavonian grebe (*Podiceps auritus*), great northern diver (*Gavia immer*) and the arctic tern (*Sterna paradisaea*). However, none of them appeared more than 2-3 times.

Looking at the category of tourist-friendliness the focus is on the tourist infrastructure and entertainment facilities. The photographs in this category depict tourist infrastructure and facilities (hotel buildings and interior, restaurants, sport centres, baths etc.) with no (or barely visible) humans in sight. The main aim of such pictures is obviously to solely focus on and advertise the business enterprises in view. It is hardly surprising to see such a big proportion of the pictures focusing primarily on tourist infrastructure. Following the old saying that 'a picture is worth a thousand words' it is only logical that that the majority of entrepreneurs want to ensure rich pictorial representation of their businesses in the tourist brochures.

Portraits of people comprise 7% of all the pictures reviewed. It has to be mentioned that the quantity of portraits was particularly high in the North Iceland Travel Guidebook, which chose to provide portraits of the employees of practically each tourist organization advertised there. Among all the people in focus two thirds (66%) represent portraits of 1 person, a fifth (21%) are couples and 13% are groups. Of all the one-person portraits, 51% are women, 49% are men. This however, varies by the setting, e.g. 70% of all the people, portrayed in the thermal baths, are women.

Another 7% are the pictures, representing urban or rural landscapes. Most of these photos are aerial photoshops, with the certain exception of Akureyri, of which a somewhat closer look is provided. In the Official Tourist Guide of North Iceland nearly all the settlements of North Iceland are represented by aerial photoshops, where houses are rarely more than dots in the vast nature.

The last 5% depict cultural heritage. Most of the pictures in this category represent various cultural monuments, historical buildings; such as churches, turf houses, or museum items. Minor portion is focused on so-called immaterial culture, e.g. depiction of mythical characters or traditional dances.

4.2 Semiotic Analysis

The combination of content analysis and the semiotic reading of the images studied enable several distinct generalizations regarding the representation of people, gender, the most popular activities, cultural life, natural landscapes and animals.

The most popular theme in the tourist images reviewed represented people engaged in various activities. People shown on such pictures are usually small in proportion to the picture, so the attention is drawn towards not to their personas but to the situations they are in, or activities they perform. Several most popular activities can be identified from the imagery of North Iceland. Winter sports are the most frequent activity depicted and winter sceneries are featured. For example, the latest edition of Lake Mývatn guide depicts snowy and foggy landscape on the cover and the Official Tourist Guide of North Iceland has added 'spring, autumn, summer, winter' pictures on their cover, together with a separate section dedicated to winter activities. It is interesting to notice how the official tourist website of North Iceland (www.northiceland.is) provides several links to foreign media coverage of the region, all primarily focussed on winter sports and snowy sceneries. This is part of the general effort to address seasonality in the region and promote North Iceland as an all-year-round destination, through marketing and promotion. Hiking, bathing and horse riding are the other activities, most commonly offered to tourists.

In general, representing people in small size in proportion to the setting is very common in the pictures reviewed. Besides, they are quite often positioned with their back to the camera, so the attention is obviously being drawn to scenery, which is to be enjoyed together with the depicted viewer. According to Jenkins (2003), these types of rear view representations have their roots in Romantic landscape painting, where persons looking away from the viewer were evoked to emphasize the otherworldly beauty of nature. For example, a very wide spread motif depicts tourists with their backs to the camera enjoying the scenic mountainous view or a tiny chain of hikers ascending a volcano, i.e. stressing human insignificance in the vastness of nature.

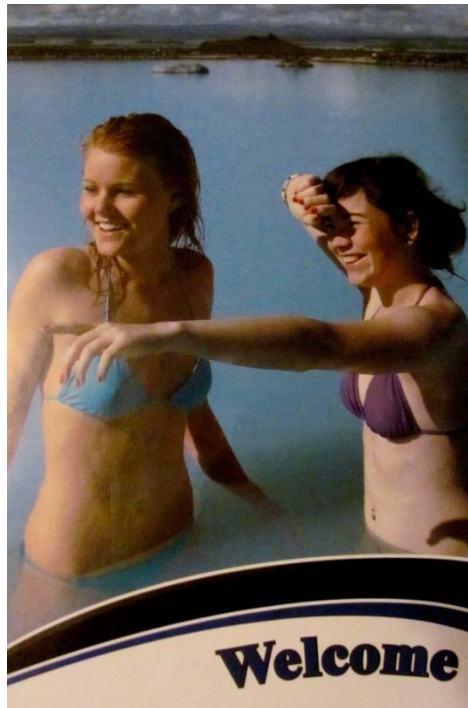


Figure 9. Cover of a tourist brochure, advertising Mývatn nature baths.

People in actual focus comprise only a small fraction of all the pictures. Though there is no significant quantitative difference between representation of males and females, female portraits are preferred over male ones in some settings, e.g. in thermal baths (Figure 9). In general, women in swimsuits are the usual ‘decorative addition’ to the photographs of baths, pools or beaches worldwide (Jenkins, 2003). Apart from demonstrating bodies in bikinis, representing women looking away from the viewer is also quite typical, since, according to Jenkins (2003: 317), this technique is usually used as a voyeuristic “attention-grabber” (Figure 9). In contrast, it should be mentioned that the advertisement of Blue Lagoon in Reykjanes has made an obvious conscious effort to break away from this ‘tradition’: their advertising photos in Reykjanes Peninsula annual touristic brochure represent a whole diversity of social groups, including elderly males and females in focus. Keeping in mind that attending natural bathes is particularly popular among senior tourists, absence of their images in the promotional material of North Iceland seems especially short-sighted.

In general, it can be argued that the tourist imagery of North Iceland fails to reflect one of Icelandic trademarks, namely gender equality. Among all the pictures reviewed there is only one case where a woman depicted is engaged in an ‘unusual’ gender role, that of a captain and

engineer of a whale watching ship (and even in this case it is understood from the picture caption rather than the picture itself). Despite observing a variety of examples where Icelandic women engage in tourist-related activities uncommon to most other women of the world, e.g. female tourist bus drivers, such examples do not make it to the tourist brochures. It may be suggested that media representations of gender roles in Iceland tend to lag behind the social reality, as was also concluded by Sirakaya and Sönmez (2000) in their study of print tourist images in the US. Despite the transformation of women's role in society, stereotypical images of women continue to be portrayed (i.e., sexy, helpless, not competitive, shy, passive), i.e. depicting how women and men "should be" according to traditional norms, rather than presenting a realistic picture (Sirakaya and Sönmez, 2000). For example, personal communications with solo women travellers revealed that Iceland has a strong image of safe and enjoyable destination for young women. Thus, four young women backpackers (from the Netherlands, Germany and UK) approached in Akureyri during the autumn of 2011, reported that they never risked hitchhiking alone before, but started to do it in Iceland, since they felt very safe and confident here. The images of Iceland as a favourable destination for solo women travellers (and depiction of them) are also absent from the images reviewed.

Unlike the analysis made by e.g. Edelheim (2006) and Bhattacharyya (1997) we will not discuss the representation of tourists vs. locals. Several cases depict presumably local people in traditional clothes (however disputable), but it is hard to make a clear cut distinction between tourists and the locals represented. This however, leads to a notable observation. All people in the pictures of North Icelandic tourist brochures, be those tourists or locals, are white Westerners (with no exceptions).

Considering the previous research on this topic (e.g. Gunnarsdóttir, 2011) the majority of pictures depicting 'calm nature' is also expected. These photos usually represent vast spaces on a bright sunny day, containing hills reflected in the seemingly motionless mirror of water. In the case of North Iceland, the panoramas of Lake Mývatn are the most popular. The whole area seems peaceful and inviting for tourists, ideal for recreation. No annoying factors, such as bad weather, wildlife or even other tourists are present. Interestingly enough, the (in)famous midges of the lake, giving it its name and being the cornerstone of the whole local ecosystem, never make it into tourist brochures. However, during my observations by the lake, we noticed the midges' annoying attacks and how these spark tourist interest towards the local wildlife. These attacks were described by some respondents informally interviewed as among the most straightforward and uncompromising encounters with the local nature. This effect of turning an unpleasant experience into a valuable and memorable one is comparable to the aforementioned tasting of the cured shark or sensing the ash of Eyjafjallajökull as 'manifestation of the vital forces at play', described by Benediktsson, Lund and Huijbens (2010: 83). The tourist brochures, however, cling to traditional and safe recipes of nature representation.

Regarding the representation of Icelandic animals, it is tempting to suggest that the 'Big Four' of Icelandic wildlife has been formed, by the analogy of the African 'Big Five' (Dyer, Kuhn and Huhn, 1996). This term refers to the 5 flagship mammals, traditionally considered the basis of wildlife tourism in Africa, sought after both for hunting and watching (i.e. the elephant, lion, leopard, rhinoceros and Cape buffalo). The Icelandic 'Big Four' are the horse, puffin, whale and seal. Their representations are omnipresent in every brochure and the Official Tourist Guide of North Iceland (edition 2010, see Figure 10) has even put all of them on the cover simultaneously.

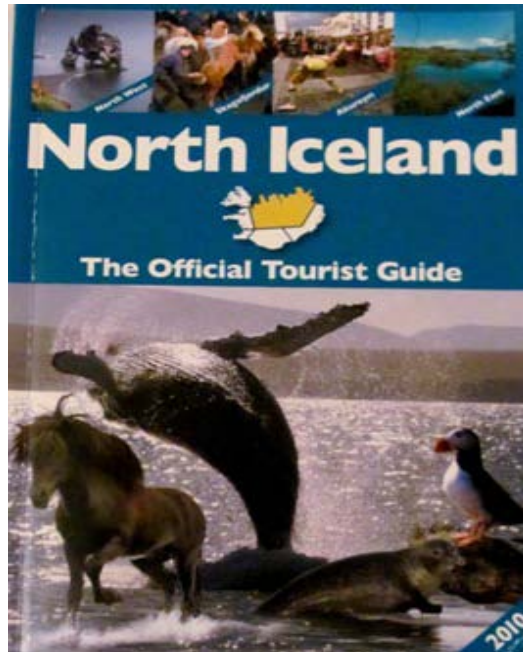


Figure 10. Cover page of North Iceland Official Tourist Guide, 2011

The Icelandic horse is the most popular animal to be depicted. Indeed, their long manes and eyelashes, modest size and diverse coloration patterns almost invariably evoke admiration among all the tourists observed. Puffins are a very popular motif on the souvenirs and are perceived by many observed tourists as ‘funny’ and ‘cute’. Whale watching is the main attraction in Húsavík, the self-proclaimed ‘whale spotting capital of the world’ (NAT, 2011). Seals are the least popular of the four, but still quite noticeable comparing to the rest of the wildlife. Interestingly enough, the marketing website of North Iceland, under the heading ‘what to see and do’, offers ‘horses, whales, hiking, birds and more’, i.e. putting animals in the forefront of its main attractions.

The representation of cultural heritage is the smallest category found among the brochures of North Iceland. This is not accidental, since as is further confirmed by the summer airport surveys, heritage and cultural attractions are not among the tourists’ reason to visit North Iceland. There is, however, underused cultural potential. Thus, there were 28 various festivals and cultural events around North Iceland in 2009, which stayed practically ignored in the touristic images reviewed. Observations during festivals at Víðidalstungurétt and Laufskálarétt in North Iceland also demonstrated absence of foreign tourists, save for several individually travelling horse enthusiasts (mostly from Germany) (see: Helgadóttir, Sturlaugsdóttir and Lobindzus, 2010).

Among the pictures representing cultural heritage specific attention should be paid to the Jólasveinar (the Yule Lads), the 13 mythical brothers, sometimes explained to tourists as ‘the Icelandic Santa Clauses’, whose portraits are very frequent due to the fact that they are claimed by marketing stakeholders to live in the Dimmuborgir protected area near Lake Mývatn (see Figure 11). It is also interesting to notice how the ‘touristic’ Jólasveinar (appearing in the tourist promotional materials) look more ‘traditional’, comparing to the ‘domestic’ Jólasveinar, who can be met in public places during the Christmas time in North Iceland and who wear the usual red and white ‘Santa Claus’ outfit.



Figure 11. Jólasveinar.

Source: <http://www.myvatn.is>

Thus, some key results of the image analysis can be shortly summarized as follows.

- Brochures remain quite important means of tourist marketing, which remains the key avenue of tourism stakeholders in the region to tackle seasonality.
- North Icelandic marketing has started to move away from the dominant image of Iceland as an island with nothing much to offer apart from spectacular wild nature, to a destination with an active and healthy lifestyle.
- The image of North Iceland as a destination for winter sports and thermal baths starts to emerge.
- Nature still remains a popular and well promoted attraction in Iceland with pristine landscapes being the traditional emphasis.
- Horse, whale, puffin and seal are the most commonly met animals in focus.
- People and culture play the secondary role in the tourist images. People, as well as towns around North Iceland tend to be represented as “dots in the vast nature”. With a certain exception of Akureyri, the rest of the towns are practically faceless and underrepresented in the brochures.
- Icelandic gender equality is not represented in the tourist images, rather stereotypical gender roles reproduced.
- All the people depicted (both locals and tourists) are exclusively white.
- In contrast to the previous research conclusions, North Iceland does not exploit the images of Vikings or Saga-related themes but puts more emphasis on the Jólasveinar.

CHAPTER 5. WINTER TOURISTS IN AKUREYRI

5.1 Winter visitor Profile

A total of 71 questionnaires were collected during the departure of winter tourists from Akureyri airport on 6th of March and 13th of March 2011. Practically all of the respondents were visitors from the Faroe Islands going skiing. Although this is a limited number of respondents it represents over half of the adult travellers in the group. Keeping in mind that 58,8% of the respondents were travelling with a family (responded not only for themselves, but also for their spouse and children), the survey reached in effect 87,4% of the departing passengers.

Among the respondents, 69% were male and 31% were female. The median age of the respondents was 44 years (see Figure 12). The majority of the respondents fall into the age range between 41 and 50 years. It is important to note that the age groups were defined in accordance with the previous surveys carried out among high-season tourists, which is compared to the present survey where applicable.

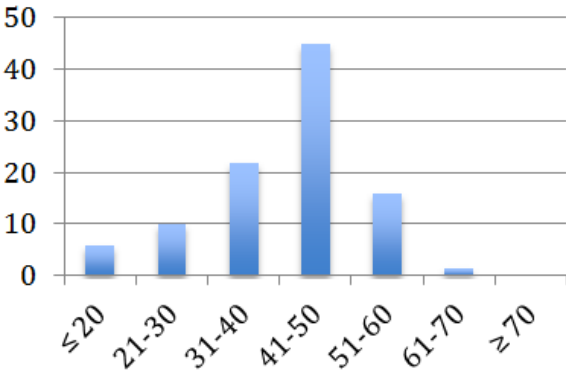


Figure 12. Age groups of departing Faroese skiers in March 2011 from Akureyri airport (%)

In terms of education the results clearly show the prevalence of people with higher education (first degree as well as master level or higher degree). If this high level of education is compared to the age groups Figure 13 shows that the strong prevalence of highly educated people is specified by the respondents' age distribution.

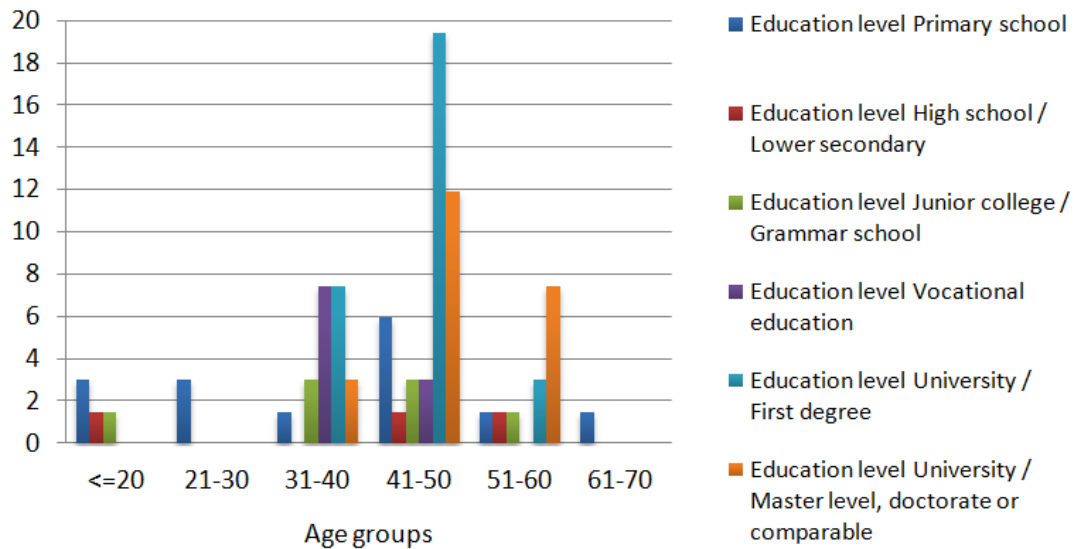


Figure 13. Comparing of educational level and age distribution of departing Faroese skiers in March 2011 from Akureyri airport (%)

As can be seen in the Figure 13, the majority of respondents with university degree represent the age group of 41-50.

The tourists were also asked about their level of income, relative to the perceived average income in the Faroe Islands. Almost half (45,5%) of tourists reported that their income was above average, whilst over one third reported average income (36,4%) (Figure 14). Those reporting below average level income are hardly noticeable; they are merely a third of those reporting high levels of income. Therefore, the results show that the surveyed group is of above average means.

Based on the above points on age, education and income it is possible to describe an average respondent as a well-educated, middle aged male, with rather high income.

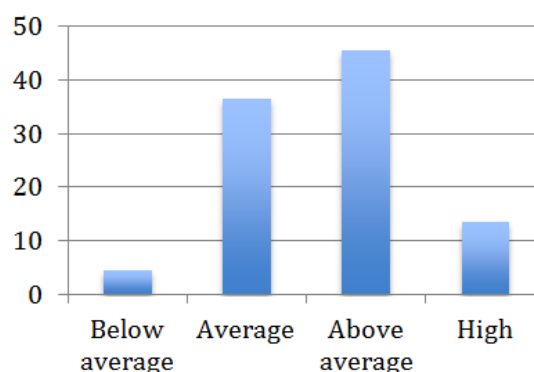


Figure 14. Level of income of departing Faroese skiers in March 2011 from Akureyri airport (%)

5.2 Trip Specifications

When the departing passengers were asked to indicate how well-travelled they were, the results showed that most of the respondents are frequent guests to Iceland. The overwhelming majority of visitors had been to Iceland before, with 45,1% of people who had been in Iceland more than 4 times (Figure 15). A dominant force in visitation patterns is proximity and that might explain the frequency of prior visits.

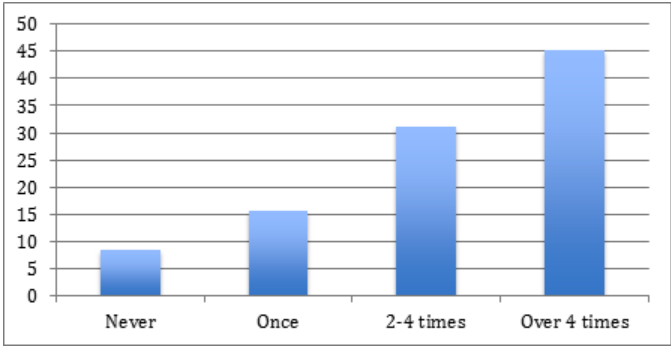


Figure 15. Number of prior visits to Iceland of departing Faroese skiers in March 2011 from Akureyri airport (%)

Over half of the respondents were travelling with children and, as can be seen in Figure 16, these are mostly full age children. Median number of both full age and underage children is two, meaning that in each family an average of two children were travelling. Moreover, a significant number of respondents were accompanied by friends and spouses. Only 7% of respondents stated that they had been travelling alone.

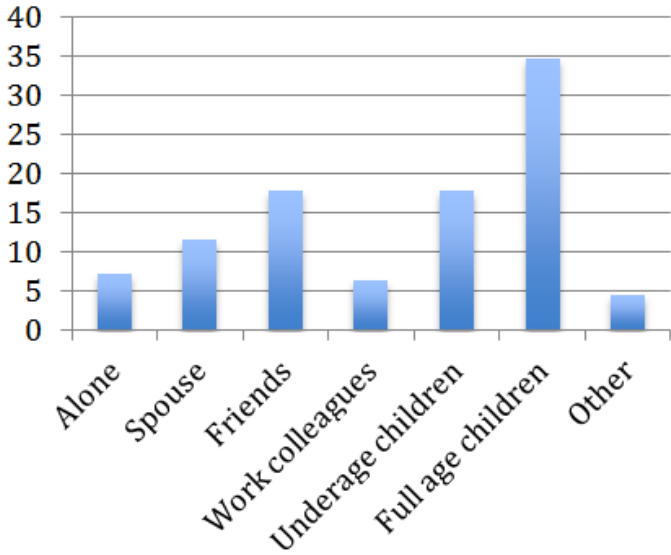


Figure 16. Travel groups of departing Faroese skiers in March 2011 from Akureyri airport (%)

Over 94% of respondents marked skiing as the main purpose of their visit, as could be expected since the respondent had bought a package tour to the Hlíðarfjall skiing resort with a

direct charter flight from Torshavn. A few reported visiting a friend as the main reason for coming to Akureyri.

5.3 Skiing Experience

The skiing skills of the responding tourists seem to be evenly divided between those who consider themselves skilled and those not. About a half responded that they had little skiing skills (either beginners or report sub average skiing skills). However, a significant part of the respondents considers themselves average skiers and over 20% of the visitors consider themselves experienced skiers (Figure 17). Such a prevalence of tourists with rather moderate skiing skills can be explained by the specificity of the Hlíðarfjall resort, where skiing facilities are mostly oriented to those skiers with limited skills in skiing.

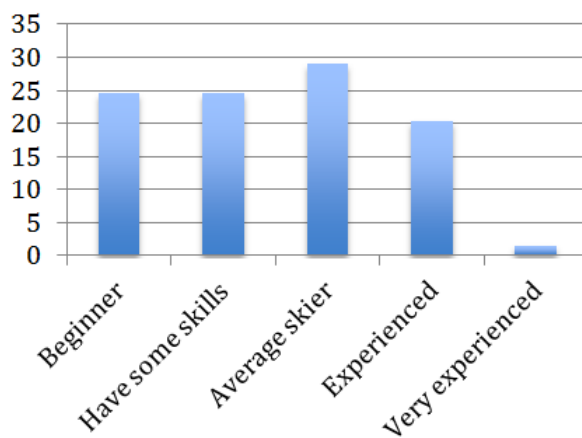


Figure 17. Level of skiing experience reported by departing Faroese skiers in March 2011 from Akureyri airport (%)

The results presented in Figure 18 indicate that most of the respondents have never been to Akureyri for skiing before. Comparing this information with answers presented in Figure 15, it is possible to conclude that the majority of respondents during prior trips to Iceland did not visit Hlíðarfjall (or even Akureyri) while visiting other places around the country.

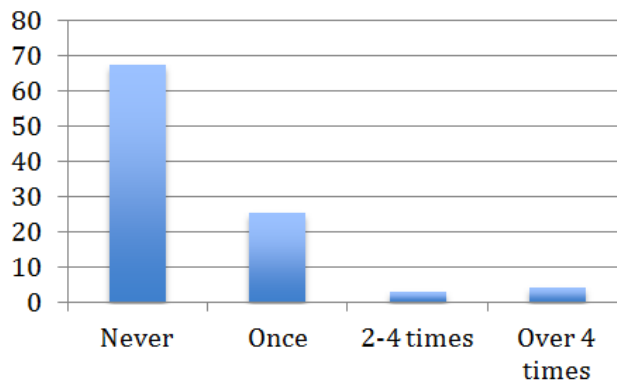


Figure 18. Number of prior visits of Akureyri for skiing purpose reported by departing Faroese skiers in March 2011 from Akureyri airport (%)

The respondents were asked to evaluate their experience of the Hlíðarfjall skiing resort. As can be seen in Figure 19, although the overall rate of satisfaction is quite high many of the respondents were not satisfied with several aspects: canteen and café in the resort (42% of negative marks), ski lifts (22%) and ski school (20%). Bearing in mind that the majority of tourists visiting the resort have moderate skiing skills, the high satisfaction levels of aspects such as children’s skiing area, the ski slopes and ski renting have essential value for the overall travel experience, although the negative factors mentioned are also cause for great concern for this particular group of average skilled family skiers.

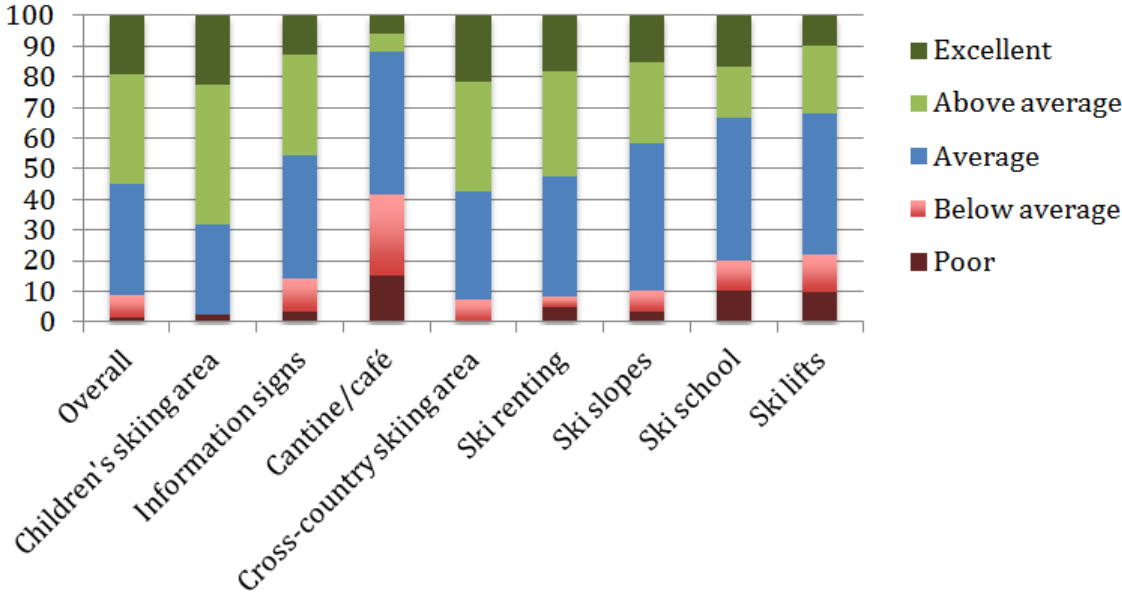


Figure 19. Rating of the experience in Hlíðarfjall by departing Faroese skiers in March 2011 from Akureyri airport (%)

Although most of respondents had not visited Akureyri for skiing purposes before, the majority of tourists (60,6%) have visited skiing resorts worldwide in the past. According to the respondents’ replies, their most popular skiing destination is Italy (28,9%), which is followed by Austria (15,8%), France (15,8%) and Bulgaria (15,8%).

The overwhelming majority of the respondents (83,8%), who have been in other skiing resorts worldwide, find their experience there better than in Akureyri (Figure 20). The main reasons respondents mention are the small size of skiing area in Akureyri (35%), ski slopes worse than in the last visited skiing resort (20%), facilities (20%) and weather conditions (20%) were also considered worse than in other destination (Figure 21).

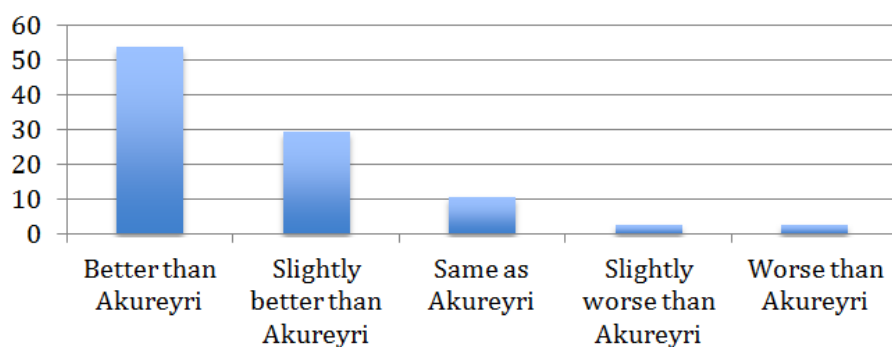


Figure 20. Rating of Akureyri experience comparing to the last resort visited by departing Faroese skiers in March 2011 from Akureyri airport (%)

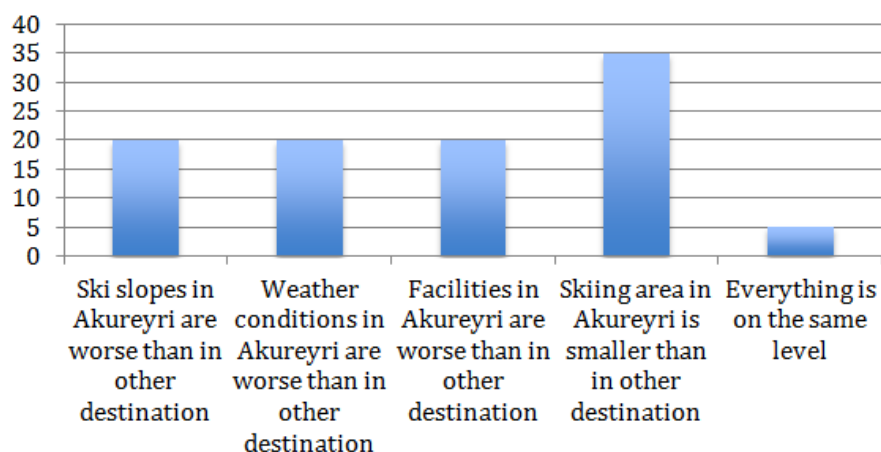


Figure 21. Reasons for rating mentioned by departing Faroese skiers in March 2011 from Akureyri airport (%)

The survey results clearly indicate that the skiing resort has certain popularity among tourists with rather moderate skiing skills, so it is possible to conclude that this group of visitors has high potential for future development and promotion of the resort. At the same time, the large number of tourists that regard their last skiing experience elsewhere better than the current indicates the importance of further development in order to move Hlíðarfjall resort to a high competitive level and therefore promote off-season tourism in the region. Besides the uncontrollable aspect of weather conditions, the reasons of other destinations' advantage over Hlíðarfjall clearly indicate the fields where further development is needed.

5.4 Staying in North Iceland

Regarding the main activities experienced in Akureyri apart from skiing about a fifth (19,7%) of the Faroese tourists mentioned other activities both within Akureyri and outside Akureyri. As to the former most respondents visited restaurants (18,5%), went swimming and/or took

natural baths (18,2%), visited bars and cafes (16,5%) and went shopping (15%). Moreover, about 7% of respondents did ice-skating during their stay in Akureyri (Figure 22).

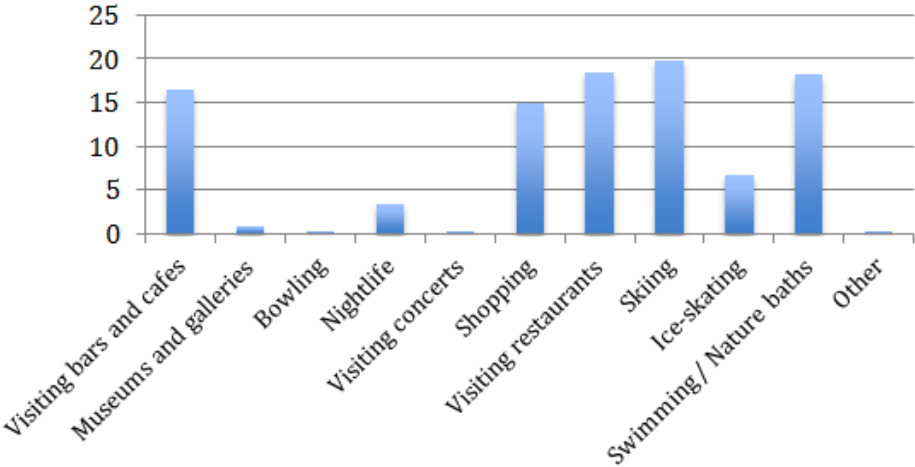


Figure 22. Activities in Akureyri by departing Faroese skiers in March 2011 from Akureyri airport

As to the latter what is most prominent there is the high percentage of those who participated in visiting natural baths (Figure 23). This can be explained by the promotion of this activity as one of the unique attractions of North Iceland and scheduled tours to the Mývatn Nature Baths as part of the package offered. At the same time it is important to note that a significant number of respondents experienced ice-skating during the visit, which can be regarded as possible choice for further promotion in order to diversify the off-season activities.

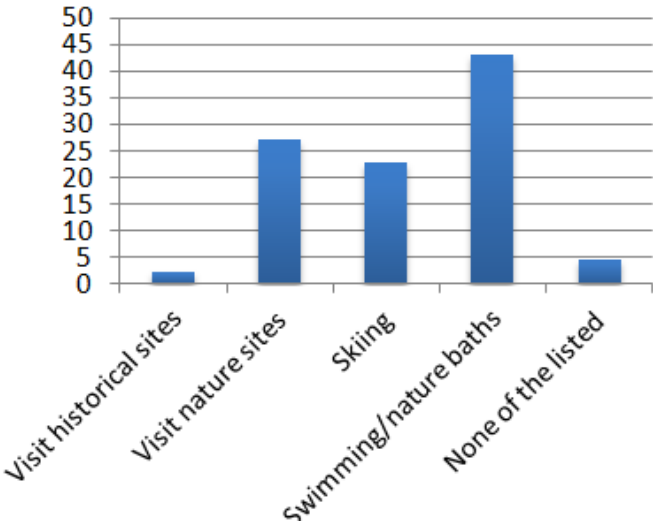


Figure 23. Activities experienced outside of Akureyri by departing Faroese skiers in March 2011 from Akureyri airport

The overwhelming majority of tourists (75%) did not visit places outside Akureyri as only a portion of the Faroese tourists included the trip to the natural baths in Mývatn as part of their tourist package. Those who did however also visited Goðafoss waterfall, which is located on the way to Mývatn and is a nature site (Figure 23).

The respondents were asked to indicate what amount of money they had spent on average during 24 hours on their trip on items not included in the package tour, and to check for how many persons this money had been spent. Due to the high rate of several dependent persons (58,8%, Figure 24), a T-test was carried out showing no significant difference between the rates given for amounts paid for one person and amounts that were supposed to be paid for 2 persons or more. The only expenditure item that indicated significant difference between numbers for one and more than one persons was “Other expenses”. Due to this reason, the “Other expenses” variable was excluded from further analysis. The results of the T-test allowed the analysis of all the received amounts as they would be spent by one person. However, it is important to note that there is still a possibility of certain overstatement of the amount spent per person due to the formulation of the question mentioning the number of dependent persons.

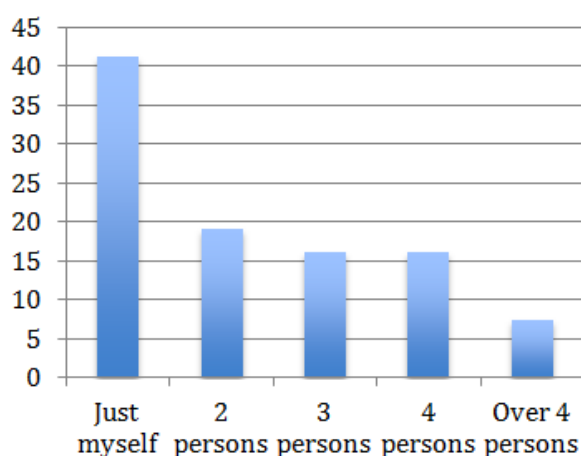


Figure 24. Number of dependent persons of departing Faroese skiers in March 2011 from Akureyri airport

In order to know what statistical parameters should be used for the overall counting, average or median, a Kolmogorov-Smirnov test was carried out on the normality of the numbers’ distribution. The test showed equal distribution for every aspect. However, the result for the “Shopping” variable was lying almost on the border of ‘normality’ (0,008 for Asymp. Sig. (2-tailed)) and the decision to count the median value was made (Table 2).

Table 2. Amount of money spent on average in 24 hours by one person of the departing Faroese skiers in March 2011 from Akureyri airport

	Food and beverages	Groceries	Recreation	Shopping	Souvenirs
N	58	24	20	49	16
%	81,7%	33,8%	28,2%	69,0%	22,5%
Average	15.526 kr.	4.545,5 kr.	3.198,4 kr.	21.892,7 kr.	998,63 kr.
Median	10.814 kr.	2.161 kr.	1.540,5 kr.	10.800 kr.	0 kr.
Used amount	15.526 kr.	4.545,5 kr.	3.198,4 kr.	10.800 kr.	998,63 kr.

According to the findings, the sum of average expenditures in 24 hours per person is ISK 35.000.

Apart from the expenditure question, respondents were asked to rate services provided on the scale from “poor” to “excellent”. Some of these categories are very broad (e.g. “value for money”, “recreation”), while others reflect relatively narrow issues (e.g. “restaurants”). The “experience” aspect refers to the overall experience rating in Akureyri/North Iceland region.

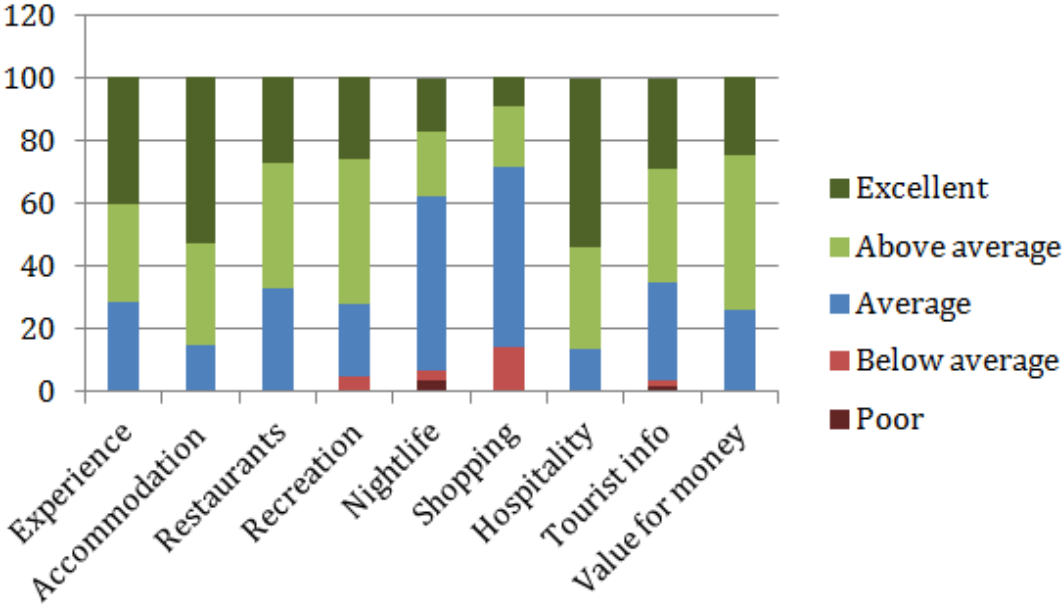


Figure 25: Rating of experience in Akureyri of departing Faroese skiers in March 2011 from Akureyri airport

As can be seen in Figure 25, the overwhelming majority of replies indicate high satisfaction level with the experiences had in Akureyri. The highest rate of unsatisfied replies relates to shopping and nightlife possibilities in the area, however these are miniscule.

The lack of nightlife and shopping opportunities seems at current to be remedied by souvenir shops. While observing behaviour of tourists from cruise ships in Akureyri in September 2011 (mostly comprising British, American and Canadian tourists), we noticed that a local souvenir shop *de-facto* became the centre of the town. Those who came into town from the ship did not engage in any other activities apart from shopping, taking pictures and hovering around the same spot for more than an hour (Figure 26). This may indicate that tourists are generally poorly aware of or uninterested in other leisure possibilities in Akureyri. This situation is also congruent with the analysis of the tourist images, since as mentioned in Chapter 4, pictures representing cultural and historical heritage in North Iceland comprise not more than 5% of the total bulk.



Figure 26. Tourists in Akureyri (September 2011)

Querying the Faroese skiers on their perception of North Iceland they were asked to name main positive distinguishing features of North Iceland. Among them, respondents marked skiing possibilities (42%), nature (29%) and swimming pools/bathing (10%). Among other positive traits of the region visitors marked low prices (affordability) and hospitality of the locals. These results indicate that the most promising areas for destination promotion and development are skiing facilities, natural uniqueness and natural bathing.

The survey results show certain possibility for the off-season promotion and popularization of winter tourism in the region of North Iceland: the majority of tourists (about 42%) are willing to visit North Iceland region again during the winter (Figure 27). The second popular season for next visitation is summer (about 35%), which is followed by spring (13,5%) and autumn (6,3%).

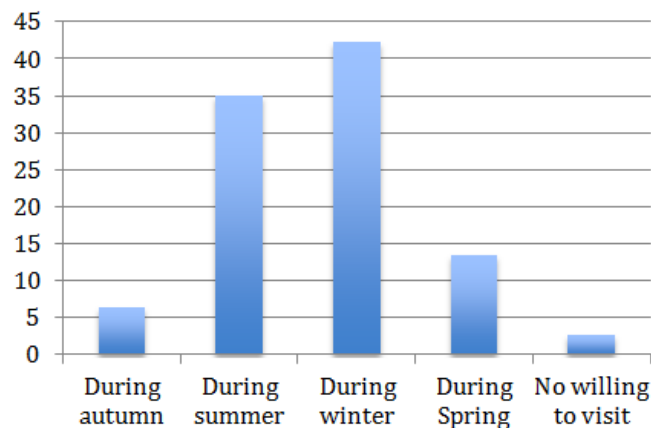


Figure 27. The willingness to visit North Iceland in future by departing Faroese skiers in March 2011 from Akureyri airport

Thus, the following conclusions are possible about the winter tourists in North Iceland:

- Skiing and attending natural baths represent the main attractions for Faroese tourists coming to North Iceland during off-season period.
- Majority of the Faroese skiers are middle-aged, highly educated people with above average (by Faroese standards) income
- Majority of these tourists travel with their families (2 children on average)
- Most of them have already been to Iceland before, but not in North Iceland
- They spend on average 35.000 ISK per person per 24 hours, besides what has been paid for accommodation and transport in the package purchased
- Most of the tourists expressed low satisfaction with the canteen and café in the ski resort, as well as the ski lifts and ski school. The majority are average skiers but have also been to other ski resorts before and rate Akureyri as “worse than in the last visiting ski resort”
- While rating different aspects of their stay, shopping and nightlife scored the lowest, whereas accommodation, general experience and hospitality of the locals scored the highest
- In general, tourists are quite satisfied with their experience in North Iceland and express willingness to visit again in winter.

CHAPTER 6. COMPARING WINTER AND SUMMER TOURISTS IN AKUREYRI

In this chapter a comparison of the findings presented in the previous chapter is made with findings from surveys carried out among international tourists departing from Akureyri airport on scheduled flights in the summer of 2010. The comparison is supplemented and qualified with the authors' observations.

Though the sample of the survey reported above is fairly moderate and its representativeness limited to only one particular nationality (Faroese), the surveys carried out in summer 2010 are also skewed towards one particular nationality as the only scheduled flight offered was to Copenhagen. The prevailing nationality responding to that survey was Danish (67%). The 2010 survey was conducted during the period of June 5th – August 28th, with 398 completed questionnaires collected. This number represents 51% of the total number of adult foreign passengers departing on those scheduled flights. The latest tourist survey was implemented in the summer of 2011 (the detailed analysis can be found in Huijbens and Helgason, 2011b), some relevant findings of which are also used in this report.

6.1 Visitor Profile

Comparing the current survey among Faroese tourists with the 2010 and previous high-season surveys, several similarities and differences can be identified in the visitor profile.

Regarding gender distribution, while the survey carried out in March 2011 shows the prevalence of male tourists (69%), the summer survey of 2010 reached both genders, though with moderate dominance of female tourists (53%). Such an inequality in gender distribution can be conditioned by the prevalence of family groups during the off-season trips as well as traditional popularity of skiing activities amongst male tourists. However, the latter reason is quite doubtful.

Almost no difference was identified regarding the age distribution: in both cases the largest group of visitors was in the range of 41-50 years old, having the average age of about 43 years. Likewise, no difference was found in the education level (the majority of tourists are with higher education) and income level (with somewhat 'wealthy' tourists with 'above average' income). Such a constant tourist profile during both high and low seasons indicates that North Iceland is traditionally popular among specific group of travellers with no dependence on the time of the year. The reason can be found in the geographical origin of the tourists: in both cases, most of the respondents come from Nordic countries. Moreover, the age distribution can be explained by the specificity of activities experienced (primarily natural bathing and swimming) that are popular among primarily middle-aged travellers.

Comparing the composition of travel groups, these prove to be quite different. While the high-season tourists travel equally with spouse, family with children or friends, the majority of low-season winter tourists travel primarily with their families and children (both under aged and adult) (Figure 28).

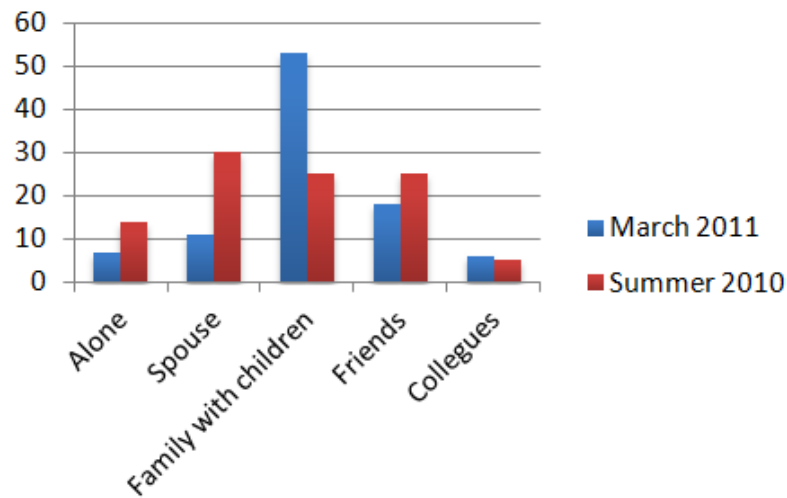


Figure 28. Comparison of travel groups (%) between surveys amongst departing passengers at Akureyri airport

This discrepancy could be explained by the specificity of winter tourism branding and marketing in the Nordic countries, which are predominantly family-oriented (Flagestad and Hope, 2001). Such family-tourist group prevalence is also reflected in the relatively small number of tourists that travel alone.

6.2 Trip Specifications

Since the trip of the Faroese tourists was specifically oriented towards skiing activities, the purpose of the visit was already predefined. Summer visitors however also mention one main purpose for their trip: holiday/vacation (72%), whilst visiting friends and relatives (15%) and business trips (3%) lag considerably behind. Obviously a comparison of travel motives is not necessary, but there is some reference to visiting friends and relatives (VFR), as 1,4% of the Faroese said this was the purpose of their trip although it was sold as a package skiing holiday in North Iceland. Bjarnadóttir and Helgason (2010) argue that the presence of VFR travel motives indicates the strength of word-of-mouth marketing and this should not be underestimated in this relation.

Regarding the question if the respondent had been to Iceland before, both surveys indicate that the majority have already visited Iceland before, however the ratios differ a lot: 91,5% in case of Faroese tourists and 53% in case of high-season visitors. Such a significant number of those who have already visited Iceland can be explained by the proximity of Faroe Islands to Iceland, a key driving force in travel motives (see Cooper *et al.*, 2005). Moreover this is explained by the fact that a charter flight from Thorshavn had been organized once before in the winter of 2010 and some of tourists travelled with both flights (personal communication).

6.3 Skiing Experience

Due to the very limited skiing possibilities during summer season, the comparison of the two high season surveys cannot be applied to this part of the 2011 low season survey results. However, skiing activities, as one of the main attractions during low season in the region of North Iceland should be discussed further, not least since tourism stakeholders in the region have defined this as the key to redressing issues of seasonality in the region.

As can be seen from the 2011 survey results amongst the Faroese skiers, the majority of tourists have somewhat moderate level of skiing skills (Figure 29). If these reported skill levels are compared to the evaluation of their skiing trip to Akureyri in comparison to their last skiing holiday to other countries, what is evident is that many of those who consider their skills to be under the average feel that Akureyri is slightly worse or worse than their previous experience. This emphasizes that the quality of the resort in Hlíðarfjall and services offered can be considered somewhat rugged and thus should be framed in marketing as a place for those with some experience.

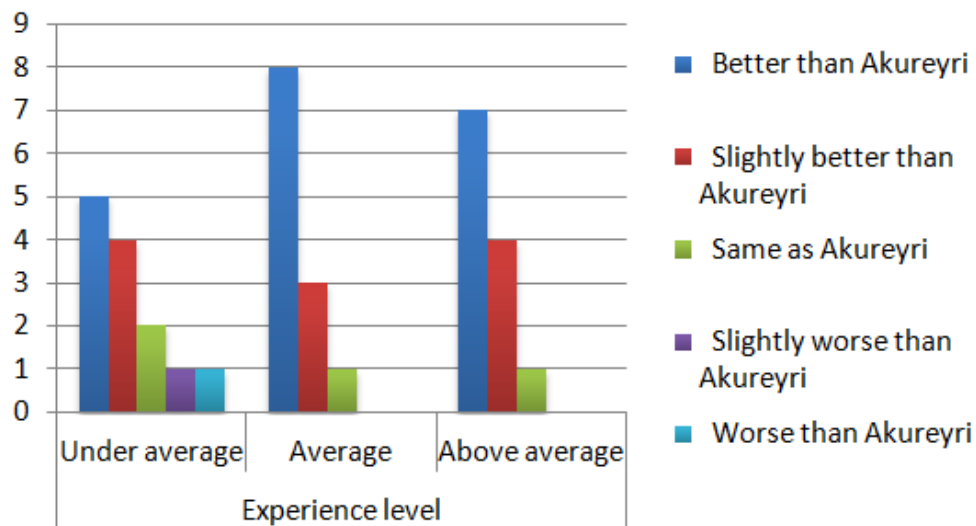


Figure 29. Comparison of skiing experience level to the evaluation of Akureyri comparing to previous skiing resort

As stated in the previous chapter, beginners and skiers with rather moderate skills represent a highly promising tourist orientation for the resort development. However, the survey results also indicate certain problems with the skiing resort’s facilities, namely canteen and café in the resort, ski lifts and ski school. Due to the fact that the majority of tourists visiting the resort have moderate skiing skills, the high satisfactory levels of aspects mentioned have essential value for overall travel experience. These unsatisfactory levels also indicate the areas which resort management should pay more attention to while developing the skiing facilities in order to attract families with lower skills and create a family profile. As Sæþórsdóttir argues, “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” (2010: 29). Due to the importance of the resort development and promotion, the level of skiing experience of the tourists needs to inform destination promotion orientation.

6.4 Staying in North Iceland

Of main interest to a number of stakeholders in North Iceland tourism is the amount of money that gets left behind in the community as a result of visiting guests. Developing off-season tourism is by many believed to deliver more income as more services will be purchased. As can be seen from comparing the reported spending of tourist in summer 2010 and the spending reported by the visiting Faroese, these expectations are confirmed (Table 3).

Table 3. Amount of money spent on average in 24 hours by one person

	Food and beverages	Groceries	Recreation	Shopping	Souvenirs
Summer 2010	4.331 kr.	3.045 kr.	2.977 kr.	3.000 kr.	2.465 kr.
March 2011	15.526 kr.	4.545 kr.	3.198 kr.	10.800 kr.	999 kr.

As can be seen in Table 3, the spending of the winter tourists is more on all items except souvenirs. In total, the average spending for 24 hours in winter is judging by this is ISK 35.068 whilst in summer it is less than half of that or ISK15.818 on these items (whilst over 29.000 ISK in total, with e.g. accommodation). As can be seen in Table 3, the winter tourists spend triple the amount on food and beverage, shop for three times the amount of the summer tourist and spend slightly more on groceries and recreation. As indicated in the summer survey, the limited amount spent on recreation leaves scope for tourism development in that area.

The difference in spending between summer and winter on the items queried in the winter survey might only stem from a difference in season. Thrane and Farstad (2009) argue that “the length of stay has a diminishing positive effect on [total] personal tourism expenditures” (p. 50). If we accept this assumption, this marked difference in the expenditure rates can be explained by the length of stay in the region: while average stay of summer tourists lasted about 8 days, the stay of Faroese tourists may be regarded as a long-weekend trip, lasting only 4 days. Moreover, the Faroese have relatively high standard of living comparable to that of the Danes and other Scandinavians (having about \$35,000 of GDP per capita (Landsbanki Foroya, 2011), might also partially explain such the higher level of spending.

6.5 Visitation Areas

According to the results in the summer surveys, the most popular travel destination outside of Akureyri is Lake Mývatn and Goðafoss waterfall. About 75% of summer tourists that go outside of Akureyri visit Mývatn (50% in case of low-season travellers) and 62% visit Goðafoss (29% for low-season travellers). The same pattern is also found in the summer survey of 2011 (Huijbens and Helgason, 2011b). Thus, it can be assumed that these sites are of key importance for the promotion and tourism development in North Iceland.

However, the experiences during winter and summer seasons differ a lot. First of all, it is important to note the weather conditions that influence travel experience. In March daytime temperatures can fall to -15°C, which, if coupled with windy weather can cause certain inconveniences. Summertime temperatures are way more sparing, usually going up to +15°C.

However, winter frost creates a unique environment for outdoor nature bathing due to the high contrast between water and air temperatures (Figure 30).



Figure 30. Tourists in the Mývatn nature bath (March 2011)

The second aspect that adds contrast between high and low season travelling to the region is the number of tourists. Generally, the Mývatn region suffers from pronounced seasonality with the greatest number of visitors coming during the summer period from June to August. While off-season travelling to the region is made by small minibus with about 8 people on board, the trips organized during high season are made by means of several coaches going from e.g. Akureyri quay side with Cruise ship passengers. The small group of tourists in the low season allows for more personal and ‘comfortable’ environment of communication with the travel guide and a certain level of intimacy.

The number of people also influences the travel experience at a destination: usually the tourists report that the view becomes ‘spoiled’ by the crowds of other tourists and cars (see Figure 31). Communicating with one tourist near Goðafoss waterfall in September 2011 also revealed that lack of other tourists was among the main reasons behind his decision to arrive off-season.



Figure 31. Tourists near Goðafoss waterfall (June 2011)

It is important to indicate what can be promoted regardless of the season in order to diversify service provisions and activities: currently, the main tourist attractions are focused on experiencing nature, nature bathing and skiing, which seems to be highly reasonable due to the uniqueness of the former two and popularity of the latter experience.

The results of the summer and winter surveys show that there is scope for the development of tourism in the low and shoulder seasons. Some key results can be summarized as follows.

- The majority of tourists (about 42% in both cases) are willing to visit North Iceland during winter. In the case of the Faroese tourists, this fact is caused by the initial travel motive, i.e. skiing and the overall satisfaction with that experience. However opportunities for the shoulder season also seem to exist.
- The ratio of tourists visiting North Iceland for the first time is significantly higher among the summer tourists than among the winter ones, which suggests that repeat visitors are more open to 'risk' arriving off-season than the first timers.
- Development of low-season tourism is also beneficial for increasing tourist yield since winter tourists spend almost twice as much per day during their stay on consumables than the summer ones.
- Nature attractions of Lake Mývatn and Goðafoss waterfall are the most popular visiting sights for tourists in both summer and winter.
- Middle aged and senior aged tourists with families are important target groups for off-season tourism development
- Winter sports and thermal baths emerge as strongest attractions in North Iceland for tourists arriving off season, meeting both active and passive leisure preferences.

CONCLUSION

Based on the analysis of the summer and winter tourist surveys in Akureyri, extrinsic and intrinsic dimensions of the studied images of brochures and participant observations of the tourists, several key conclusions can be made, which demonstrate both congruence and contradiction among different sectors of North Icelandic tourist industry.

First of all, despite indisputable importance of the Internet, printed touristic media, such as brochures, guidebooks and leaflets still remain a key source of information for tourists, especially during their visit to the country and while making a decision to visit particular places. Therefore, image production should be paid significant attention to for destination image promotion, both via printed media and websites.

It can be safely assumed that North Iceland marketing has started to move away from the dominant image of Iceland as an island with nothing much to offer apart from spectacular wild nature, to a destination with an active and healthy lifestyle, which is also pointed out by Huijbens (2010) in an assessment of the Mývatn region as a wellness destination. This trend is also visible through the images in the tourist brochures. In other words, tourists are still invited to gaze at nature, but are more to do so while being actively involved in recreation. North Iceland marketing can also be seen to be aiming to redress the issues of seasonality, which it suffers from more than the capital area, and promote the region and Iceland as an all-year-round destination, putting an emphasis on winter sports.

The image of North Iceland as a destination for winter sports is visible both from the images and surveys analysed. The images are mostly appealing to people with active and sporty lifestyles (and sufficient income), willing to enjoy skiing, snowboarding, riding horses, snowmobiles and jeeps. In other words these images appeal to those who are ready to meet the Icelandic winter in a well-prepared, active and positive way. The winter tourists surveyed in Akureyri fit this category, with a majority indicating 'above average' income level and pursuing an active life-style.

The key findings indicated that the majority of the winter visitors to the Hlíðarfjall resort have rather moderate skiing experience. Majority of the tourists are well-travelled and find North Icelandic skiing facilities to be worse than in other places they visited. In addition, most of the Faroese skiers have been to Iceland before, and most of them more than 4 times prior to their winter ski visit. The ratio of first-timers among the summer tourists was significantly higher. Apart from the nationality bias, it can be suggested that tourists who are already familiar with Iceland are easier to attract during the winter time to the North, rather than those who have never been there before. This can be indicative of certain ideas tourists have prior to visiting Iceland, e.g. unbearably harsh winters in the "land of ice", and more so in its northern part. The analysis of winter tourists' and their experience in Hlíðarfjall skiing resort also showed the importance of family-oriented promotion, since the majority of the respondents were well educated middle-aged adults with their children.

The less active tourists are offered to enjoy the hot baths or appreciate local cuisine. Swimming and enjoying in the nature baths were indeed indicated by winter tourists as the main activity outside Akureyri apart from skiing in Hlíðarfjall. It has to be mentioned that the natural baths by Lake Mývatn was among the first tourist attractions in the region to be open all year round (Huijbens, 2011b). Ice skating was also quite a popular activity among the winter tourists, which was, however, practically not represented in the brochure images.

In line with the findings of previous research (e.g. Sæþórsdóttir, 2010), nature still remains the main attraction in Iceland. It also still dominates images (Gunnarsdóttir, 2011) and on the numerous natural sceneries, humans and human impact are not visible or, if present, are minuscule, underlining the greatness of the overwhelming wild nature. The domestic representations therefore often follow the traditionally dominating images of Iceland in the foreign media. For example, in her analysis of representation of Iceland in foreign literature, Neimann (2011) points out the little change in representations of Iceland throughout the centuries. In many contemporary foreign novels Icelandic nature still is described as “both prehistoric and futuristic, like an alien planet...having qualities suggesting other, older reality, preceding civilization” (Neimann, 2011: 488). Many tourist images cling to this very perception of North Icelandic nature. In a related fashion marine wildlife and seabirds feature as three of four ‘star species’ of the North Iceland fauna (and probably Iceland in general). Visiting nature sites (particularly Lake Mývatn and Goðafoss waterfall) is indeed the most popular activity among the surveyed tourists both in summer and winter.

During the high season Iceland is particularly attractive for the international tourists who do not stay in hotels or hostels, but in alternative accommodation, i.e. camping, in farms, with families or with friends. In fact, in 2010 North Iceland received more of this kind of international tourists than the capital area. Based on extremely drastic seasonality, it can be concluded that most of these tourists are campers and those who come to North Iceland want to be close to nature in general. Promotion of nature-based tourism activities as visible in the images (horse riding, hiking etc.) might be very reasonable for this particular group.

Comparison of winter and summer tourists in Akureyri also confirmed that in general, winter tourists spend almost twice as much per day during their stay than the summer ones on particular consumables. The winter tourists spend triple the amount on food and beverage and shop for three times the amount of the summer ones. This suggests that development of low-season tourism is also beneficial for increasing tourist yield.

People and culture play a secondary role in the tourist images. Unlike Reykjavík, the cultural life of North Iceland does not seem to have much to offer to the tourists, if judged by its images. There are very few photographs that reflect urban and rural life, local festivals and other activities, which are not related to nature and sports. Shopping and nightlife got low evaluation from the tourists and are also poorly represented in the images, as well as cultural activities. The surveys also demonstrate that the tourists arriving to North Iceland are rarely involved in culture-related activities in or outside Akureyri. However, the category ‘hospitality’ got the biggest number of ‘excellent’ evaluations from the tourists surveyed. This is of course something created by the local people and felt by tourists, but which was not reflected in the images, i.e. the cultural potential of Icelandic hospitality is underused.

In contrast to the conclusions of Kjartansdóttir (2011), North Iceland does not exploit the images of Vikings, Saga-related themes or pagan symbols. The Jólasveinar, heroes of Icelandic folklore, have taken this vacant place. Their images are especially popular in the brochures about the Lake Mývatn, where some relevant events are organized, e.g. the annual visit of the Jólasveinar to the thermal water of the Mývatn nature baths. These images can also be seen as an attempt to tackle seasonality, since Jólasveinar are traditionally connected to Christmas and hence become active during winter time, also attracting tourists.

In line with the critical observations of Alessio and Johannsdóttir (2011), it can be concluded that social achievements of Iceland, e.g. gender equality (Iceland usually appears in the top 5 of the Gender Gap Index, together with other Scandinavian countries) as well as acceptance of sexual minorities (e.g. Iceland has the first openly lesbian Prime Minister in the world) are not reflected in the tourist imagery. These still quite uncommon (unfortunately) factors, comparing to the majority of other countries in the world, remain ignored instead of being emphasized and turned into a part of the unique image. While both genders are equally represented in the images analysed, women, even if not openly objectified and sexualized, are not involved in anything which would indicate their higher role in society, comparing to other countries with worse gender equality climate.

In addition, all the people depicted (be those tourists or the locals) are exclusively white. While one can argue that Iceland still is predominantly a mono-cultural society (immigrants constitute about 7% of the population and most of them are also white), ignoring the growing tourist flows from countries like Japan and China, as well as demonstrating absence of non-white tourists from other countries (e.g. US and Canada) can be quite misleading.

In general it can be concluded that the imagery of North Iceland, while rather diverse, still has a big underused potential. There is no clear image of the region (though orientation towards active sports and all-year-round destination can become more visible in future). Quite illustrative is the tourist map of winter activities in North Iceland, which shows three dozen small images scattered all over the area, trying to offer everything at once.

Besides, the images of North Iceland usually follow the 'classic' recipe of nature-based representation and there is rarely any unexpected content (i.e. something not represented in the promotion material of other regions of Iceland) to be seen. Many images are repetitive and appear several times in various publications (especially images of Lake Mývatn). Although seasonality obviously constrains the activities that can be experienced in high- and low-season the visits to the Mývatn region seem to be a stable attraction of North Iceland during both high and low seasons. Along with this, it became clear that tourist attractions to the west of Akureyri are underrepresented in the tourist brochures. The research findings also indicated that while off-season tourism has certain advantages over high season travelling, however, the activities of summer tourists seem to be more diversified than activities of those who travel during the low season.

To sum, if tourist representations of Iceland produced by foreigners reflect long-lasting stereotypes and are harder to change, Iceland's representations of itself should be at the forefront of establishing new images, creating new stories and searching for alternatives 'angles' of representing Icelandic reality. Some possible directions have been already pointed out in previous research, e.g. the development of a Nordic wellness concept (Huijbens, 2011b), stressing gender equality and safety for solo female travellers, more emphasis on cultural heritage and local life, diversifying the "gaze from a distance" (Gunnarsdóttir, 2011: 547) with more close and concrete images of everyday life and cultural events. While being quite successful in the capital, the regional marketing efforts are still quite cautious to step into unknown waters. Further research is needed to study larger samples of visitors in both the high- and low-season, in order to correct existing policies and tackle seasonality.

All in all, the main 'take-home' messages of this report, stemming from the results of both the image analysis and a small winter tourist survey, can be roughly summarised as follows:

- ***Nature still reigns supreme.*** This proved to be true for North Iceland for both summer and winter tourists. North Iceland also attracts more tourists preferring alternative accommodation than the South-West. Nature landscapes and particular natural sights (such as Lake Mývatn, Goðafoss and Dettifoss waterfalls) as well as the star species of animals are also a predominant theme in the tourist images. The images generally follow the usual natural recipe of representation, i.e. wild and pristine, motionless and inviting, already well-known and extensively discussed.
- ***North Iceland is for the active and health-oriented!*** It can be safely claimed that North Iceland currently attracts tourists not only to its natural sights but also to the opportunities to engage in active and relaxing leisure. This is particularly important for addressing seasonality, since winter sports and thermal baths are strong tourist attractions off-season. This is also in line with the findings of the image analysis, which indicate that active sports, thermal baths, and winter sceneries are quite frequently represented in the brochures. Future research will show whether this truly becomes the image of North Iceland.
- ***What about the people and culture?*** Images of people in the tourism brochures follow quite 'traditional' recipes from a gender, social and demographic perspective. Cultural heritage is least present in the images compared to all other categories. However, the hospitality of the local people scored the highest among the surveyed tourists in comparison to other aspects of tourists' stay in question. How to represent hospitality and tap into the underused cultural potential, highlighting its strongest points, is among the challenges for tourist promoters in the future.
- ***Akureyri, Húsavík and...*** Apart from Akureyri as the obvious center of the North Iceland, 'the northern capital' and Húsavík as a 'whale-watching capital' there is no clear image and representation of other towns around North Iceland. The images of other towns in the brochures tend to be depicted from above, emphasizing their small size in comparison to their surroundings. The results of the surveys also demonstrate that the majority of the tourists hardly travel outside Akureyri or visit only nature sights but rarely other towns (particularly those to the west of Akureyri).
- ***Diversity and innovation.*** Most of the images of North Iceland fit into the patterns previously researched by various authors and which, moreover, can be traced to stereotypical representations of Iceland. The tourists surveyed also demonstrated lack of diversity in their activities in North Iceland, particularly off-season. It can be argued that there is still considerable space for innovation and diversification of tourist activities, which will, most probably, be developed gradually as the tourism industry in North Iceland becomes more mature.

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