



MS thesis

Marketing and International business

International marketing of Icelandic salmon rivers

The experience of fishing outfitters

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June 2014



HÁSKÓLI ÍSLANDS

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Preface

The project this thesis is based on is part of a larger project titled Salmonchange, hosted by the Norwegian University of Life Sciences, which focuses on sustainable development and innovation in angling. This final paper values for 30 ECTS for a MS degree in Marketing and International business from the University of Iceland. I would like to take the opportunity to thank the participants of this research without you this would not have happened. I thank my instructor PhD. Fridrik Larsen for valuable input and critic. I thank PhD. Gunnar Thór Jóhannesson for his advice and input and PhD. Stian Stensland for his comments. I was fortunate enough to be surrounded by wise teachers who took the time and effort to guide me and for that I am thankful. And for the all time classic and because you are all important to me I thank my family and friends.

Abstract

In this thesis the experience of fishing licence outfitters in Iceland on marketing strategies is examined. It provides new knowledge of ways of marketing for angling destination and what directions to take to get ahead of other destinations. The thesis is based on qualitative methods that were judged effective means to gather data from the small and tight community of the Icelandic angling industry. For this thesis there were conducted six individual in depth interviews with experienced outfitters. The goal is to explore and use their experience to figure out how Icelandic salmon rivers are marketed. It investigates which factors impact the marketing environment and implies positive ways of improvement.

The main findings shows bright points in the current marketing situation of Icelandic rivers but the environment appears to be fragmented. There are clear ways to improve the marketing with better coordinated messages and friendlier framework. The infrastructure in Iceland is good according to participants but the united opinion is that there is a demand for better structure with the service of guides. Participants agreed that Iceland has a positive image that helps them attracting customers. Pricing effects is an interesting subject and most participants talked about the prices simply being too high.

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1.0 Introduction

Iceland has a great variety of productive rivers where salmon fishing is practiced. Sport fishing for salmon in Iceland has been a part of the society for a long time. Foreign visitors have been coming to this island in the middle of the North Atlantic Ocean since the nineteenth century as it is regarded to offer one of the most outstanding fishing for Atlantic salmon anywhere in the world. Despite the history this market is not very noticeable outside of the angling society and the standard of strategic marketing in this sector could be improved. Public interest for angling in the country, however, is rather large as it is estimated that about 60.000 Icelanders go trout or salmon fishing each year. According to a report, from the Economics Institute of University of Iceland since 2004, about 7.000 foreign visitors come to the country each year specifically for Icelandic fishing (University of Iceland, 2004).

The image that Iceland seems to have as a country and a fishing destination should be ideal for the market. A country offering pure and pristine natural environment with fishing management striving for sustainability for instance through the practice of catch and release. The research is based on qualitative methods that were judged effective means to gather data from the small and tight community of the Icelandic angling industry. In this study, the experience of Icelandic fishing outfitters is examined and their opinion on the marketing of their rivers to foreign anglers. Fishing outfitters are professionals that sell and broker salmon fishing licenses to fishermen. These participants were interviewed and their professional experience is the key ingredient of this thesis. The interviews were semi structured and open ended. That form suited the research as it gives the researcher authority to add questions and probe for better answers when necessary. The outfitters were asked to share their views and opinions. They gave examples on the good and the bad of marketing Icelandic salmon rivers. They gave real life examples about what is beneficiary and what is not when it comes to marketing. After reading this thesis one should be able to learn from their vast experience.

Marketing in domestic fishing has not been studied a lot despite the fact that the Icelandic angling industry's creates a substantial amount in revenues with the direct effects accounting for between twenty one to twenty five million pounds each year. When direct and indirect effects are included the Icelandic angling industry creates around 100 million pounds in revenues (Agnarsson, S. et al., 2008).

In Iceland as well as the other Nordic countries fishing rights belong to the landowners. Sometime they manage the fishing areas by themselves but in other cases they rent out the rights to fishing outfitters (Stensland, 2010). In many rural areas in Iceland the income from fishing rights is crucial to the livelihood of habitants such as sheep farmers (Agnarsson, S. et al., 2008). The market environment for salmon angling is subject to change and pressures for instance in terms of preferences and characteristics of the target group. In general the trend in international recreational angling is moving towards sustainability and modest use of natural resources. The researcher feels that this research can explain what marketing measures are made in order to enhance competitiveness for Icelandic rivers and that the result gives examples on how it can be improved. The subject is really close to the researcher who has worked and lived in the industry every summer since 2007.

In my opinion there is a lack of domestic research on this subject even though I could find articles about closely related material. This need for more research was a part of why I felt it was best to do a qualitative study on the subject. This study is the first to study the marketing experiences and strategies of Icelandic outfitters and provides a novel contribution to the field of destination marketing for salmon angling. It is my hope that this research opens up the world of experienced fishing outfitters and that others can use it for long-term benefit for the country as a salmon fishermen destination. I am sure that other professionals in the tourism industry can take lesson from this thesis. In case of the angling industry suitable marketing can help Iceland to stay as a front-runner for years to come. In this thesis the following research question was used:

How do Icelandic outfitters view the marketing of Icelandic rivers to foreign fishermen?

In this research I conducted six interviews with renowned fishing outfitters. Their education and experience vastly differs between individuals but I think that gives the research greater depth. The participants were all males, one from each company and all of them have extensive knowledge of selling fishing licenses. The fishing license can be anywhere from only the fishing itself up to fishing with full service of a chef and fishing guide. This thesis is set up as follows: Introduction, Theoretical part, Findings and discussions, summary and ending with some ideas on Further research.

2.0 Marketing

Marketing is a collection of theories, methods, rules, guidelines, thoughts and ideas (Varadarajan, 2010). According to the American marketing association marketing is a process of making, interacting, spreading and exchanging offers that have value for the consumers (AMA, n.d.). Marketing is also the process where consumers have a need or desire for something and search for products or service that fulfills that need. Companies have to understand that need and create a product or service that meets it.

With good marketing companies can make profit and find motivation to improve their business. Marketing is the key factor in the birth and growth of a company because if the product or service does not reach the consumers the life cycle of a company will obviously be short. Marketing plays a big role in creating value for a company and its customers by differentiate products and services (Kotler & Keller, 2011; Kotler et al., 2005). According to Lilien and Srinivasan (2010) the two main factors of marketing are research and development (R&D) and advertisement. Researching able companies to learn the needs of the market and they can meet that need with developing new products or changing existing ones. The research results can then be used to tailor the marketing and advertising material to the target group, build up brands, increase sales, grow awareness and improve customer loyalty (Lilien & Srinivasan, 2010). In the following text destination marketing is explained with an emphasis on direct marketing and customer relationship marketing.

2.1 Destination marketing

Every year the importance of destination marketing grows in tandem with increased competition in attracting travellers. In destination marketing two things are vital; that is to display the qualities of a destination as well as its whereabouts (Hjalmarsdottir & Olafsson, 2003). Marketing a destination is a complicated task. In a destination many things effect one another and stakeholders have different opinions on what kind of image they want presented to the market. The biggest stakeholders are the society,

companies in the area and the government. It is very important to have a good and clear marketing strategy where all the stakeholders run in the same direction (Feng, et al., 2004; King et al., 2000). Although it can prove difficult to reach a common ground it is a key factor in the long-term success of a destination because marketing is in the hand of all the stakeholders at a destination (Bramwell & Yuksel, 1999). Collaborative destination marketing has not been researched a lot despite the fact that in the tourism industry working together and forming partnerships is a popular reference. Cooperative marketing of a destination usually takes place with the help of destination marketing offices (DMO's). When analyzing how partnership networks and marketing material representing the same destination should be DMO's help with the coordination. There are countless things that need to be taken into consideration when explaining cooperation relationships at destinations and how they should be divided between stakeholders (Kotler et al., 2010; Prideaux & Cooper, 2003).

To market a destination can be quite tricky because the place in itself can be difficult to define. One can think about a place as a whole country, a region, a valley or even a continent (Crang, 1998). Figuring out how to label destinations can be a really difficult thing. Some think that Africa should only be marketed as a the whole continent while others think that each and every country has its own points of difference which has to be shown in order for them to survive as a destination and be prosperous. But wherever one stands in the marketing aspect of a destination you can definitely divide destinations into two relative categories that are macro and micro destinations. For this project, Iceland is a macro destination and and micro destinations within it can be a town, valley, waterfall, lake, river or a mountain (Kotler et al, 2010; Saarinen, 2004).

Once you have defined the destination then there is often conflict between stakeholders about what the destination stands for and how it should be portrayed to the market segment. It is important that the image in the marketing material is based on reality and is in sync with local views. If those things do not sync together it is possible that tourist's expectations will not match their experience. If that happens then there is a risk that the traveller is not happy with his journey. Therefore it is vital that the marketing material holds hands with the destination (Buhalis, 2000). It is also important that the infrastructure at a destination is solid enough to welcome tourists

that visit and take care of their needs. The reason for that is explained in the following text.

2.2 Infrastructure

Destinations can easily lose their appeal in today's international environment. The possibilities of destinations to travel to are endless and in order for a destination to stay on top of competition there are some things to keep in mind. It is very important for destinations to reinvent themselves, build up good infrastructure, plan events and be creative in order to be successful. A successful destination can welcome more tourists and they leave happier. It needs to be well managed and deliver solid performance. Happy guests tend to return again and they will for sure tell others about their lovely experience. It is very important that destination marketing takes place with both private and coordinated advertising. In today's competitive environment it is vital that destinations have a vision on how they are marketed so they do not lose their status with the people who are travelling all over the world. In short the marketing strategy has to be both compatible and logical (Getz, 2008; Kotler et al, 2010; Prideaux & Cooper, 2003).

Building up strong infrastructures can make or break a destination. Poor management, lack of maintenance and infrastructures can overpower destinations attractions in a few years time. Travellers return from their visit unhappy, they tell others about their experience and the destination goes into decline that results in fewer visitors. If a destination has good management, strong infrastructures and good maintenance set up then it is well on its way to become more successful in attracting high quality and happy travellers. The management and marketing of a destination can be really difficult due to the fact that there are a lot of voices that want to be heard and make a mark on both things (Buhalis, 2000).

With coordinated management and marketing the options for a destination are vast. Wang and Xiang (2007) explained that in order for a destination to gain a competitive advantage innovation environment has to be friendly and the market should push for product and service development. Management teams in destination have to come

together, make a marketing analysis and coordinated marketing with a clear vision on where to go and what message to put out there for the target group. The most important factors of destination marketing are what makes a destination special and where it is located (Hjalmarsdottir & Olafsson 2003). If a destination meets ones demands and even exceeds them it can quickly spread out. Simple things as better roads or more consistent message from a destination has for example brought, towns and cities in North America, back to life.

According to scholars (Allen et al., 2010; Kotler et al., 2010; Lee et al., 2008) event tourism and attractions can play a big role in the life of a destination. To plan events at a destination is a good way to attract new visitors. Events can reach the ears of new target groups and help make the season of a destination longer (Lee et al., 2008). With event planning it is important for the best result that the event happens around the same timeframe continuously for a number of years. That way the event builds up reputation, engages visitors to return as well as attracting new guests each year. If an event is successful then in time he will sell out and open up a new gap for more events. In many cities of the United States, casinos play a big role in attracting visitors to their location. Casino guests are not as fragile towards prices as the common tourist and they often bring a lot of economic benefit to the society (Getz, 2008; Kotler et al., 2010). There are various promotional channels that can be used to advertise destinations. In the next chapter some examples are given.

2.3 Ways to market destinations

What kind of marketing does a destination use to put its name at the top of the list? It used to be all about mass marketing, targeting big markets with standardized messages through channels like TV, media and newspapers. Todays marketing trends are moving more towards individualized messages, narrow targeted marketing and direct marketing. Direct connection with well-targeted individual costumers is what direct marketing is all about. The communication channel goes directly to the customer and, with detailed customer database, marketers can customize messages to well defined segments or even down to every single buyer. This allows the marketers to get

immediate response and they can tailor every message sent to the customer in question (Belch & Belch, 2009; Kotler et al, 2010 Sablosky, 2005).

In order to be a successful destination, marketers must know their target audience. The target group can be divided into smaller groups with different demands and needs. Destinations can create different types of trips that serve various types of travellers. A destination needs to be able to cater to the needs of their customers. Destinations must know what kind of tourist they seek so they can build their marketing material around that. A destination needs to ask itself whether it wants big quantity of tourists that spends low amount of money or if it should seek high-income tourists that spend time and money at a destination (Getz, 2007; Kotler et al, 2010). Direct marketing has been proven effective means to market salmon rivers and the following lines will further explain the reason for it.

2.3.1 Direct marketing

When marketing salmon rivers direct marketing and customer relationship marketing appear to be a common tool. These marketing tools hold each other hands and are a good way of retaining clients and attracting new ones that fit the category. Direct marketing is a tool that is widely used in destination marketing and it can be of good use when dealing with a narrow target group like salmon fishermen (Kotler et al, 2010). Direct marketing is growing at a rapid pace and is about 10 percent of total sales expenditure today in the United States (U.S.). Forecasts assume that direct marketing sales will grow around 6.3 percent annually compared to 4.8 percent with total U.S. sales. Direct marketing is getting more and more Internet orientated and that will probably continue evolving like that. Internet sales and marketing was around 18 percent in 2010 of total direct marketing driven sales and it is assumed that it will rise over 15 percent per year (Kotler et al, 2010).

Marketers can build customer relationship with direct messages and private channels of personal communications. They can build up a database that enables them to learn about the needs of their customers. When they have learned that product or service can be changed or adjusted to increase customer satisfaction. The database comes with

lots of possibilities for example restaurants can keep track of favorite food or taste for wines. Hotels and restaurants can send out emails for yearly events such as birthday parties. When the email reaches the customer at exactly the right time it is likelier for success (Chye et al., 2002; Dyché, 2002; Kotler et al, 2010).

The benefits of direct marketing for buyers are availability, ease of use, how private it is, good information flow about products and prices as well as being immediate and interactive. Customers have all the data they need to compare products, choose and buy the ones they like. They choose what to look at and when to look at it. Customers can, for example, buy airline tickets online or book a hotel any day or time of the week. It is convenient to be able to search for the best price and book it once you find it (Belch & Belch, 2009; Kotler et al, 2010). In the angling industry the return rate of customers has been very high so companies focus on keeping tight connection to retain the customers. The following chapter explains how relationship marketing works.

2.3.2 Relationship marketing

Customer relationship marketing is a fast growing tool in businesses and is used to retain and build up customer groups. This includes a simple thing like personal email communication as well as a coordinated marketing communication through every communication channel from Web pages to answering the phone (AMA, n.d.). With that business is able to better retain customers, increase loyalty towards company and get repeated purchases from the same customers. If businesses continue to build their relationships with customers they get a bigger customer base who buys more and therefore reduces the cost of marketing (Beaujean, Davidson and Madge, 2006; Chang et al., 2002; Ozgener and Iraz, 2006). In customer relationship marketing it is important to know the customers. Relationship marketing is about a strategy that fosters customer loyalty and their long-term engagement. It focuses on retention of clients rather than to acquire new ones. It is a cost-effective way to a better business because it is considered at least five times less costly to hold on to existing customers than to acquire new ones (Ozgener and Iraz, 2006; Raman, Wittmann and Rauseo, 2006). Customer relationship marketing is about having a strong connection with customers

and providing them with good information that are tailored to their wants and needs. Good customer relationship marketing can show growth in the word of mouth activity, customer willingness to help a company is greater and give it their opinion on the good and the bad. It is a valuable thing for a company to have customers that engage and give feedback about their product and service (Nakhleh, 2012). Another angle of relationship marketing is the visitor relationship marketing that is about keeping track of visitors to improve your service.

In a study of visitor relationship marketing (VRM) Pike (2007) showed even though regional tourism organizations (RTO) accepted the fact that visitor marketing was an important and growing tool in customer relationship marketing the key finding showed they were not able to track repeat visitors, communication with previous visitors was lacking and RTOs assumed that accommodation operators were doing the CRM. It is important for marketing purposes that each destination or attraction follows their customers and listens to their opinion in order to become as successful as they possibly can (Pike, 2007). It is interesting to look at the similarities between fishing tourism and ecotourism and below the connection is examined.

2.4 Sustainability and ecotourism

The growing popularity of tourism has an effect on both the environment and the culture at a destination. In order to survive the rapid increase of international and domestic visitors destinations must develop a plan and build up infrastructure to welcome visitors and meet their expectations. Negative effects may include pollution, damage to natural environment undesired social change and degradation of infrastructure on site. In the face of negative impacts of tourism the concept of sustainability has been translated into tourism studies as well as policy and planning. Sustainability can be reached in so many levels but in practice it means that the future generations are not affected in a negative way because of the use of a resource by current generation (Cohen, 1995; Urry, 1995; Honey, 1999). According to the World Tourism Organization sustainable tourism should be as follows;

1) Make optimal use of environmental resources that constitute a key element in tourism development, maintaining essential ecological processes and helping to conserve natural heritage and biodiversity.

2) Respect the socio-cultural authenticity of host communities, conserve their built and living cultural heritage and traditional values, and contribute to inter-cultural understanding and tolerance.

3) Ensure viable, long-term economic operations, providing socio-economic benefits to all stakeholders that are fairly distributed, including stable employment and income-earning opportunities and social services to host communities, and contributing to poverty alleviation (UNEP & UNWTO, 2005, 11-12).

Ecotourism is an example of tourism practices that is based on the ideology of sustainability. That is tourism that focuses on the environment as well as the local community. It evolves around the participation of the local community in the management of a destination, clear vision that the environment needs to be in first place and people have to be educated in environmental responsibility in order to make the best decisions regarding their domestic nature. For a destination to be sustainable it has to keep its natural habitats pure and unspoiled to keep the same value for future visitors as well as inhabitants. Iceland has to protect the unspoiled wilderness and countless rivers with fresh fish swinging for the fishermen flies (Honey, 1999; Page & Dowling, 2002; Olafsdottir, 2008).

The trend in Iceland has moved from getting as many tourists as possible towards getting the right tourist that helps with the positive development of a destination. Mass tourism can bring a lot of negative effects to a place but when solutions are tailored to the distinctive features of an area then it is far likelier to handle and deliver happy travellers that want to visit again. When destinations strength and weaknesses are used in their marketing strategy and building of infrastructures it is very likely that it will gain popularity and be prosperous (Erlingsdottir & Gudlaugsson, 2009; Saethorsdottir, 2009).

For recreational fishing to be considered as ecotourism it should enhance protection of local natural habitats and deliver revenues to the surrounding area. The main reason for fishing not being seen as ecotourism is both that long-term effect on the environment has not been researched thoroughly enough and that catching and killing

goes in the consumption category of tourism (Arlinghaus, 2007; Zwirin et al, 2005). Usually fishing rivers are in rural areas and the fishermen bring money to the area that is important for the local people and society (Arlinghaus & Mehner, 2004). Marketing channels that are used for angling tourism in Iceland are now explained.

2.5 Angling tourism

A very common marketing tool in angling tourism is the word of mouth (WOM). Happy customers likely tell others about their experience, which has a positive effect on others but keep in mind that a dissatisfied customer has a way bigger effect. Negative Word of mouth is considered way more influential than positive because unhappy customers tell many more of their experience than happy ones (Chatterjee, 2001). If a company manages to make a customer consistently happy then that customer can in some way work as an unpaid salesperson by carrying out a positive WOM about the company and its service (Bruhn, 2003). The reputation of a company is mostly spread out by the WOM so it should be a common goal of everyone doing business to keep their customer happy because a company's reputation is a very valuable possession (Murray, 2003).

In general the marketing for fishing tourists mostly takes place on the Internet. It is a flexible way, which is full of opportunities if used correctly. One of the biggest advantages of online marketing is that it is easily measurable and the results can be valued in real time (Gudmundsson & Hauksson, 2009). The Internet is one of the most effective tools to build up demand for a product or service. Customers can choose what they look at so companies need to put in the work so their product satisfies their target market. This evolution gives the customers a stronger position towards the company because before a purchase customers look for reviews and make their decisions based on their perceived opinions combined with other people's opinions (Blackshaw, 2008). According to a research in 2009, consumer opinions matter, 90% of consumers trust a product/service that friends or relatives recommend over any advertising (Nielsen, 2009). According to Zhu and Zhang (2010) experienced consumers are less affected by the WOM than inexperienced ones. In a niche market the effect of WOM is greater than in other markets. The recreational fishing industry for Atlantic salmon is definitely a niche market.

Another tool that is directly connected with WOM is consumer narratives, which is both stories and or reviews. Narratives are believed to be a good selling tool for a product or an experience because people are open to stories. The storytelling marketing is continuously growing in the hospitality and tourism industry. It is a good way to get through to people, have them picturing and living the actual moment. Tourism products are usually an experience and that is also the case in angling tourism that makes narratives a good tool for marketing of the angling tourism (Tussyadiah, Park & Fesenmaier, 2010).

Angling operators use this method a lot they do so by inviting journalists, columnists and photographers to their rivers in return for articles, photos and reviews in print and on the web. Many of them also use good reviews from clients in their marketing material and especially if the clients have made a name for themselves (Sela.is, n.d.). In the next chapter recreational salmon fishing is explained and what it is all about.

2.6 Recreational salmon fishing

To fish with a line and a hook has a long history, in the beginning people did so to gather food but it has developed more into a recreational activity. On average about 10% of the people in the western world do fishing as a hobby (Danylchuck & Cookie, 2010). Recreational fishing is an outdoors activity that is quite popular in Europe with around 20 million anglers and about 25% of them come from the Nordic countries (Tovivonen et. al., 2000). In America one in ten bought a fishing permit in 1999 (Ditton et al., 2002). According to a research from the University of Iceland (University of Iceland, 2004) around 60.000 Icelanders do some recreational fishing each year. According to the same research Iceland welcomes about 7.000 travellers every year that come here especially for the fishing. Most fishermen only fish in their own country but international travel because of fishing is becoming easier with better air connections and cheaper travel (University of Iceland, 2004).

Atlantic salmon rivers are a natural resource of very limited source in the world. Few countries in the world have rivers with healthy, self-sustaining Atlantic salmon runs. Norway, Scotland, Ireland, Canada, Russia and Iceland are the countries that recreational fishermen from all over the world come to visit because of their Atlantic

salmons. Of these countries Iceland and Russia in general are more expensive than Canada and Norway. Iceland is known for a big quantity of salmon, Norway for their big salmon and in Russia it depends on the time and rivers weather you expect quantity or big size. Iceland has many rivers with Atlantic salmon in its natural habitat and fishing licenses in Iceland are rather expensive compared to other countries. Due to the fact that salmon fishing is a limited resource with a prefixed amount of rods and fishing time the price of fishing rights has increased in historic context (University of Iceland, 2004). People perceive Atlantic salmon fishing as the hobby of the wealthy even though there are always places that one can visit without having to loose an arm over.

The biggest challenge facing recreational fishing in the western world is the rapid aging of fishermen who have the money and means to travel for Atlantic salmon fishing. The fishermen that fall of the grit outnumber the new recruit that results in a decline in number of fishermen. River managers are concerned about the decreasing number of anglers and the trend is shared among other outdoor activities and the decline is mostly due to fewer young people practicing them (Sport England, 2006; Natural England, 2006; Spark, 2001; Harris Poll, 2004). An interesting trend in recreational salmon fishing is the practice of catch and release. This involves fishermen releasing the salmon alive back in the rivers after they catch them. The following chapter is about the catch and release method and the growth of the practice in numbers and attitudes.

2.6.1 Catch and release

In recreational fishing the trend worldwide is moving fast towards sustainable fishing. A huge part in that is the successful and popular method of catch and release (C&R) which involves a fisherman that catches a fish but once he has landed it he puts the fish back in the water so the fish can fulfill its duty and put its genes to use for future survival of the species (Veidimalastofnun, n.d.). International trends are moving quickly for this behavior that originated in the United States. In Norway the catch and release statistics are around ten percent but in Iceland it is closer to thirty. Despite Norway having way lower catch and release statistics the trend is moving in the same direction as here (Stensland et al., 2013). The main reasons for catch and release is the protection of the stock. More fish produces more future fish. More fish in a river enhances the chance of

better fishing throughout the fishing season. Fishermen have better techniques than they used to which allows them to fish more thoroughly and better. That equals less change of survival for adult fish and less spawning fish in the end of each season (Wilde, 2002).

The practice first became common in the United States and since then a lot of countries have followed (Aas et al.; Policansky, 2002). Catch and release number are growing each year and the effectiveness is undisputed given that research show the death rate of released fish can be as little as from five percent to 0.1 percent if the fishermen treats the fish with care (Arlinghaus et al., 2007; Policansky, 2002). The downside of C&R is the ethical issue that many anglers struggle with. Some think it is cruel punishment to fish just to release the prey again, they see it as a torture for the animal. Others think that the grand picture is that the fish is not harmed and a fish in the water can survive but in the freezer they cannot. Most of the fish that is released does survive and that must be a good thing for the species (Aas et al., 2002; Arlinghaus et al., 2007; Olsen, 2003; Policansky, 2002). As seen on Table 1 this method is commonly practiced in Iceland and C&R numbers have grown a lot in the last ten years. C&R has been practiced for a number of years here and abroad and it is the recreational fishermen answer to keep the sustainability of the stocks for future generations to fish (Veidimalastofnun, n.d.).

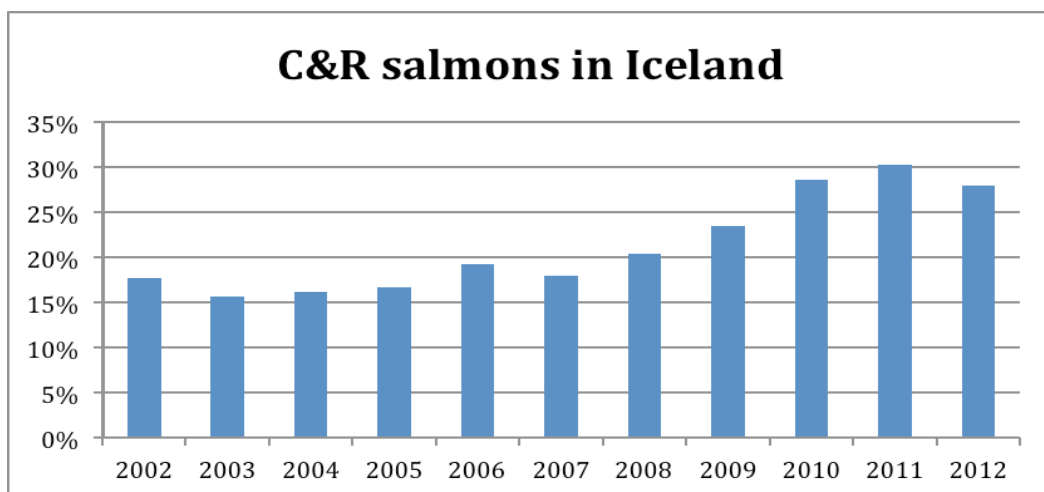


Table 1. Caught and released salmons, in Iceland, as a percentage of total catch years 2002-2012

Many rivers in Iceland practice catch and release only but even more rivers have quota of one to five salmons per rod per day. After a fisherman catches his quota he has to release the rest of the fish. The rules help the management of the river and enables the stakeholders to have a say in the future development of their stock (Wilde, 2002). Icelandic rivers are managed closely and the legal framework around them is clear. Next chapter is about the characteristic and legal peculiarities of the framework.

2.6.2 Management of recreational fishing in Iceland

Iceland has many rivers with fresh Atlantic salmon that runs through and spawns in them. The rivers and lakes of the island are privately owned property of the land that adjoins the water. Each landowner owns the stretch of water that is connected to his land so usually there are a handful of owners by any given river. Exceptions are when the same person has bought up all the land surrounding a river. River rights are inseparable from the land rights. The landowners are obligated to form an alliance for the rivers expenditure and earnings. The alliance either bids out the river rights for the fishing licenses or sells them on their own (Isaksson, 2002). The monitoring of the fish stock in the river is usually in the hands of the landowners unless there is a clause in the contract with outfitters that says otherwise. Icelandic salmon rivers are usually rented on one to five year contracts were the landowners sign an agreement with the fishing outfitters. In the agreements all details are listed which are different between rivers as well as the length of the arrangement. Usually affiliates and agents take a five to twenty percent commission for selling the licenses.

According to the law Icelandic salmon fishing season can be up to 105 days per river. Rivers are often fished for fewer days and ninety days is a popular number. With this amount of days the salmon gets a time to rest in the river before spawning which usually takes place in October or November. The number of rods per river is limited. Legislation and river rights holders have to pursue and make a case if they want to increase the number of rods in their river. In salmon rivers the daily fishing time amounts to the maximum of 12 hours fishing (Agnarsson et al, 2008).

With the clear-cut framework and rules concerning salmon fishing the use of this natural resource is kept at a sustainable form. Each river association then sets rules for their river and can therefore choose how many salmons get killed if any and which tactics are used when fishing for the prey. In Iceland data is collected for every river. The data for the whole country has been listed since 1900. With the database one can follow up and downswings in the Icelandic salmon ecosystem. Research is also made from scale samples of salmon that are sent to the Fisheries foundation (Veidimalastofnun, n.d.) after each season. The guideline is that the Fisheries foundation requires scales from about 5-10% of salmons killed in a river to be examined every year (Veidimalastofnun, n.d.). The framework in Iceland has proven to be efficient in terms of management. It is important to collect data after each year because the data has a predictive value. In other countries the data collection tends to be fragmented and underutilized. It is more difficult to control the resource and enhance its sustainability when the numbers are missing (Harrison & Schratwieser, 2008).

In this theoretical chapter the focus is on destination marketing and what promotional channels Icelandic fishing outfitters have used to for their salmon rivers. According to the thesis they both use direct marketing and relationship marketing were they keep good connection with customers to retain their business. I have gone over the angling tourism and its connection with ecotourism that has been increasing with the growing popularity of the catch and release practice. The last theoretical chapter goes over the framework and management of Icelandic salmon rivers which is considered one of the most successful in the world (Stensland, 2010).

3. Methodology

In this methodology chapter, the choice of methodological approach is explained and discussed. My relation to the research subject is described and reflected upon. A reason is given for picking qualitative research for this thesis. Following there is a section about in depth interviews, the analysis strategy and the procedure surrounding them. The data collection and how it took place is discussed and then there is a short description of the interviews. The methodology chapter ends with a short discussion about this thesis reliability issues.

3.1 The qualitative method

The following research was made to examine the opinion of outfitters in Iceland towards the foreign marketing of Icelandic salmon rivers. In this paper qualitative research is used. In qualitative research understanding is sought in experience, beliefs, circumstances and feelings that groups or individuals form (McDaniel & Gates, 1998). Qualitative research has fewer participants than quantitative but the information gathered is deeper and more wholesome. Participants can choose their own words to describe their experience and emphasize on the things that they consider important (Kvale, 1983). Qualitative research is for example when participants are interviewed or focus groups are used. Looking for an explanation on certain words or sentences by checking participants understanding on the phenomena in question is the core of qualitative research. In order to do so participants are asked to give examples about the phenomena right after they answer open questions about it. That gives the answers more depth and minimizes the danger of the researcher making own assumptions. The researcher seeks to understand the participant's experience by combining the complete environment, body language and words chosen to evolve a theoretical viewpoint about the research. Qualitative researches are about validity not generalizing power like

quantitative researches. The validity is shown when the research explains the things it was set out to (Bryman & Bell, 2007; McDaniels & Gates 2007; Taylor & Bogdan, 1998).

The method was chosen because the researched phenomenon is narrow and well defined and there is not a lot of written data or articles about it. Qualitative research is a good tool to use to understand the experience of people from their point of view (Bogdan & Bilken, 2003). In this case the people are the stakeholders in the fishing industry in Iceland. The field does not have many big players so a number of six was considered ideal to share experience and beliefs of what the market is about according to them. The six individuals that were chosen all have extensive experience and each of them represents the biggest companies in the industry. The goal is to be consistent with the research and share views and experience of the participants with the readers. I try to show holistically how participants view this thesis subject and I am aware that it does not represent the opinions of the whole market, but I hope that it reflects well on participant's opinions. In qualitative research the point is not to make generalizations about the subject like in quantitative research (McDaniel & Gates, 1998; Kvale, 1983).

Qualitative research and process is a flexible tool that can easily take changes. The research questions or goals can change as it progresses and information can be sought to new participants if the researcher thinks he needs it. The interviews main factor is to help enhancing people understanding on their experience and other complicated sociological conditions (Gephart & Robert, 2004; Larsen, 2014). The researches implement the participants understanding of their own life and how they interpret the things and events that they are faced with. This is descriptive analysis where opinions and words of participants are viewed without being theoretically analyzed (Esterberg, 2002). The next chapter describes the characteristics of phenomenology and how it suits this thesis.

3.2 Phenomenology

In this research phenomenology was used as a source of inspiration to understand the experience of individuals. Phenomenology is a philosophical analysis and the essence of

qualitative research. According to phenomenology the experience of participants is utilized to understand a certain phenomenon that is being researched and it is done with the use of participants specific experience. When descriptive data is used to narrow research results down to specific concepts or theories one uses induction. Induction is one of the main features in qualitative research. Here the experiences of participants is used to lead to a conclusion through a flexible way that takes into an account the work of a researcher as well as the participants expressed feelings. The researcher utilizes the research's data to find explanations by reading the data thoroughly and look beneath the surface (Bogdan & Biklen, 2003; Kvale, 1983; Larsen, 2014).

Based on phenomenological approach the researcher seeks to understand the meaning of individual experience. The researcher goes through three stages in his data analysis, first he describes the data, then he uses reduction and the final stage is interpretation. With each stage the researcher becomes a bigger part of the data (Smith & Martinez, 2006). In the describing stage the researcher puts his view of the phenomenon aside. In this stage it is very vital that he is neutral and does not let his own opinions affect the result. The researcher reads the interviews numerous times until he sees possible categories in the text. The interviews are then interpreted. Researcher goes over the data, puts himself in the participants shoes and does all he can to fully understand his meanings. In stage two the interviews are summarized after categories.

The second stage is about understanding the interviews and what the participants mean by their words and what part of it is important with the research question kept in mind. The interviews are summed up and themes are formed (Lanigan, 1988). Stage three is about interpreting the experience and finalizing the analysis. The most challenging parts of the interviews are put in their categories and sometimes the researcher has to search deeper to find the hidden meaning of participant's experience. When going over these three stages the researcher lives and breathes the collected data. He gets really familiar with his interviews and tries to understand everything to its deepest meaning (Orbe, 1998). The researcher plays a big role in qualitative research and in the next chapter I explain my relation to the subject and my position for it.

3.3 The researcher

In qualitative research the researcher is the main tool when it comes to processing and collecting data. The researcher does his best to put his feelings and opinions aside when examining the phenomena but it is nearly impossible to have zero effect on the outcome. As a researcher I am aware of this and very focused on not putting my own opinions in this research. I am collecting and processing data from participants that I saw best fit to give a good idea of the opinion that fishing licence outfitters have on the marketing of Icelandic salmon fishing to foreign anglers. By choosing the ones I did I already have affected the research but I did my very best to pick the most qualified people according to the research criteria. I seek for themes in the interviews and try to find common ground in the participants' opinions and experience.

I have over fifteen years of experience in the recreational fishing industry. I have fished countless rivers and lakes. I have guided both foreign and local clients in numerous rivers over the years. I have also arranged and organized fishing trips for salmon and trout fishing. I have my own opinion about the subjects of this research but I will set that completely aside as I am researching the opinions and experiences of the participants in this research. The participants of this research are far more knowledgeable and experienced on this subject. I had great joy in interviewing them and putting their opinions in the written words of this thesis. Next there is a chapter on in depth interviews and why they fit this research.

3.4 In depth interviews

Interviews are often used to gain knowledge about certain phenomena. With interviews researcher can gain access to selected individuals in a narrow field and utilize them to the fullest to probe on certain subjects so he understands completely. With in depth interviews the researcher can focus on the specific experiences that he feels most important with his research (Burns & Bush, 2005; Orbe, 1998). Researcher tries to get clear and focused comments so he understands what the participant means. When the

answers are not good enough the researcher seeks deeper meaning by asking for clarification such as the participant giving examples to certain answer or describing their experience in other words or with further details. It is very vital to probe when necessary to get deeper answers so the interviewer can get to the core meaning from the participant (Larsen, 2014; Orbe, 1998).

The interviews were semi structured one on one interview where the researcher used a questionnaire as a frame (see Appendix 1). Since the interviews were open ended and semi structured the researchers main role is to keep the flow moving but only use the questionnaire as a checklist to see if certain information is needed. The researcher can take necessary action if he wants further details or if he feels the urge to probe. After that he can look at the questionnaire again if he needs to get back on track (Burns & Bush, 2005; Esterberg, 2002). The analysis strategy of this research and its procedure is presented here below.

3.5 Analysis strategy and procedure

Because of the narrow subject of the research and the limited material already available about it I chose to do a qualitative research. In Iceland, the field itself has few significant players in the recreational angling society. Due to these facts I felt that with the special experience and knowledge of the participant the research would be best conducted with semi structured in depth interviews. According to Creswell (2007) five to twenty five participants is the recommended amount when conducting phenomenology researches. With that in mind I chose six participants who are substantial players in the recreational angling society in Iceland. Each of the participants represents a company. These six are the biggest companies in the market and there was clear harmony with their experience. In this research I did not feel there was a need for other participant because the results felt theoretically saturated. I am convinced that these six participants are fully capable of representing the ideas of this research's market. The interviews were conducted one on one so the opinions of others would not be a factor in the participants answers.

All of the interviews were recorded on a mobile phone and then transcribed. The interviews were transcribed shortly after the recording so the setting and atmosphere

of the interview was fresh in memory. Along with the spoken words I put in extra comments on expressions, focus, silences, looks or things worth mentioning. Once the interviews were all transcribed on paper they were read thoroughly. First they were read with an open mind and the researcher looked after emphasizes in the text. Emphasizes are listed and then the search for patterns and themes begins. The patterns and themes are summarized and the text is read again with the main themes kept in mind. In the following chapter I go over the interviews questionnaire that was used as a guideline in the interviews.

3.6 Interview questionnaire

The whole questionnaire can be seen in Appendix 1. When the participants of the research were selected the researcher contacted six participants that he felt important in the market. The participants were picked because they all have extended knowledge that counts for more then a hundred years. Their opinion and experience has had a big part in molding the market to what it is today. The participants are all from different Icelandic companies so the vision and opinions form a broad scale of their group as fishing license outfitters. One of these companies sells fishing and hunting everywhere in the world but others are mostly on the Icelandic market. There are three other companies that focus on the foreign market. In total these six individuals bring around 4000 foreign fishermen each year that accounts for more than fifty percent of the foreign market. On the table below there is a description about each of the participant. The participants are named participant 1 to participant 6, but in the analysis they will be given random numbers in order to remain completely anonymous.

Table 2 Decription of participants

Participant	Description
P1	In his thirties and with a lot of experience from selling salmon fishing licenses. He is the marketing and sales director of one of the biggest outfitter in Iceland. They are the outfitter for nine salmon rivers. He has been working in the industry for a long time and has

worked for three of the largest companies in the field. In all of these companies he was the head of sales and marketing so he has formed many relationships with foreign fishermen. He has also attended numerous sales shows both in North America and Europe. His opinion is of great value to this research. He was very interested about the subject and informative.

P2 Chairman of the biggest fishing club in Iceland in his fifties and has about quarter of a century experience in the field. The club sells licenses to nine salmon rivers. He has been the chairman for two times since he was brought back in after a few bad years to put the club back on the map. He has guided many foreign anglers and greeted many on behalf of the club. He has extensive knowledge and his experience as the chairman is of great weight to this research. He was extremely interested about the research and spoke bluntly.

P3 Even though his company is of young age it is already overseeing and organizing trips for hundreds of foreign anglers. He sells licenses to seven salmon rivers. Before he started his own company he was a guide but decided to start his own where he would focus on doing thing better than his old workplace. He is not the most experienced but he has fresh views on the subject and has done a substantially good job in few years and built a great company around fishing. He is determined and strongly opinionated on the issue.

P4 On his fifties and has played a big role in building up fishing rivers all over the country. His company has been in this industry for over twenty-five years. The company welcomes many clients each year from all over the world. He is very experienced and his opinion is important to the research. He knows how to build up river systems and market rivers from the beginning stages of their angling period. He manages three salmon rivers in Iceland. He was interested in the subject like the other participants.

P5	On his sixties and has a very broad experience and phenomenal network. He has been working in this industry for decades and welcomes around twelve hundred people every year that come to Iceland for the salmon fishing. He manages three rivers exclusively and three others partly. He has done a great job in marketing his rivers and has used his networking abilities to his advantage. He uses relationship marketing a lot and is very direct with his sales. He spoke a lot and openly about the subject and was very open and positive but sometimes a little hard to follow.
P6	On his forties with great experience. He has worked in the angling industry for just under twenty years and is now the head of sales for one of the biggest angling company in Iceland. He welcomes around thousand fishermen on a yearly basis and has done so for years. He has attended numerous sales shows and overseen marketing for many Icelandic fishing rivers. He manages and sells fishing to fourteen rivers systems in Iceland. His experience helps giving the research greater depth. He had fun speaking about the subject and was open-minded.

As seen on the table above the participants of this research are very experienced and those six individuals represent qualified part of the Icelandic recreational salmon fishing industry. Their extensive knowledge and opinions formed such a united front that I felt that the data was theoretically saturated. In the next chapter the procedure of the data collection and when it took place is presented.

3.7 Data collection

For the data collection the key factor is that it is consistent with the main goal of the thesis and according to the methodology of qualitative research where phenomenology is used. The researcher either sent an email, Facebook message or made a phone call to reach out to the participants. Over these channels the thesis goals where outlined, for

what cause this was being researched and that it was the final paper towards a master's degree in marketing and international business. The participants where all eager to give interviews and they where lined up from the 30th of September to the 13th of November 2013 when the last one took place. All of the participants were male and the researcher was familiar to them but had no solid connection to any of them. The data consists of six interviews with a big part of the main players in the Icelandic angling community. There are two more players in this river renting market but the participants represent the six main companies.

The interviews took from forty to fifty five minutes each. They all took place in the participants' offices. In the interviews participants are encouraged to explain the research subjects according to their own experience. Before all the interviews there was a dialogue about the form of the interview and a general discussion about this and that. When the general discussion begun being fluent and comfortable the recording started. The dialogue before and after the interviews was often longer than the interview itself and the participants where all very interested in expressing their thoughts and opinions in their own experience. They were all eager to give a glimpse into their mind. Permission was sought from the participants before the recording started and then the interview began. All the interviews were recorded on a mobile phone device. Afterwards the interviews where listed along with the researchers remarks about the circumstances and how he experience them. The researcher logged his thoughts, description of the participants and the atmosphere during the interview. The data listing took place soon after the interviews while they where still fresh in memory.

The recordings were good and clear so there were no problems with understanding the spoken language. The data analysis involved reading over the interviews many times and searching for important words and sentences. They are then underlined and listed on paper. The data analysis has to be according to the text and expressions from the participants. Usually the more time and effort spent into the analysis the more reliable it is. Afterwards researcher figures out the main themes of the text in his honest opinion and then summarizes them into a consistent text. Researchers opinion of this research's reliability is presented in this next chapter. What factors are important in my mind and the reason for why they matter.

3.8 Research's reliability

It is important that a researcher fulfills his qualitative research in an ethical way. In qualitative research interviews there is a risk of arbitrary subjectivity and the risk is even greater when it comes down to analyzing the data. The reliability of a research holds hands with the researchers ethics. Reliability of a research is good if the researcher interprets the data consistent with the participant expressions (Kvale, 1983; Merriam, 2009). I conducted this research and wrote down and listed the interviews. I am not very experienced in the research field even though I have done a few of similar sort. In every aspect of this research I was honest and true to what I felt was truly the meaning of the words that I logged from the participant interviews. My inexperience will hopefully only have a minor affect on the research, its procedures and findings but I do realize that there is always a possibility of improvement. The interviews and data collection went very smooth as a whole and I feel that I got everything I needed for my research. The interviews ran smoothly and I always probed and asked a follow up question when I felt necessary. The experience, emotion and opinions of the participants was always the main target of the interviews and I did my very best to get to the core of it. In the first two interviews I could have done a better job putting down points about the environment and my researchers comments. In the other interviews I kept that in mind and did more of it. I do not think that that beginning hurdle has an effect on the research itself and its findings. In the next chapter this research's findings are categorized and explained.

4. Findings and discussion

The results of this study will be analyzed and informed in the following chapters. The participants of this study had rather similar views on most of the things in question. The participants are named P1, P2, P3, P4, P5, and P6 in random order. My goal for this research was to give a glimpse into the world of the Icelandic fishing licenses outfitters. I wanted to explore their experience and spot the main features. Looking at the Icelandic salmon industry there is a lot that can be learned from it. The following chapter explains the most important aspects according to this research's data. These aspects are put in categories according to the following themes; the current form of marketing, limited amount of salmon anglers, Icelandic fishing culture, the infrastructure, the effect of pricing both negative and positive and then the image of Iceland. The first theme of this findings chapter is the current form of marketing.

4.1 The current form of marketing

In this thesis the participants mostly agreed that the marketing for Icelandic salmon fishing is at best random and that it lacks a form of clear vision from the fishing license outfitters. To draw attention to fishing areas the outfitters visit sales shows abroad, offer fishing journalists fishing for their writing and try to stay visual on the Internet. Most of the participants agreed that the crucial part of foreign marketing is done through contacts and relationships with agents. P2 talked about the marketing being really arbitrary:

I see the marketing as being really random first and foremost, there is no specific formula that professionals seem to be using but most of them go through these so called contacts in Britain, Spain and Switzerland. But the ones that have it best have it both ways, their solid returning customers mixed with agents.

The P2 also spoke about that the scope for outfitters, to market the salmon fishing licenses, is very tight because of the environment:

Saying that I mean that first and foremost the formal ways are not versatile, going to sales shows or marketing online. In my opinion this is due to the high price domestically which gives little leverage for marketing money. This also has to do with the fact that when you only have a three year contract for a river then you are not willing to spent big sums of money in marketing because when it starts to deliver then you don't know weather you still have the river or not. The environment here in Iceland does not offer any marketing. To speak bluntly everyone can see that you cannot justify to put real money into marketing, you really have to let others do that job and that is where the agents come in.

P2 added that sales shows are more about meeting people and sniffing up the right contacts. It is about being visual and in a way you are representing the whole country. Interested anglers come to gather information and maybe that leads to a visit one day. P2 was certain that the best marketing by far is about delivering satisfied customers because they almost always deliver another customer. Those customers enhance the Word Of Mouth (WOM) marketing and according to research 90% of customers trust people reviews over advertisement (Nielsen, 2009). P4 also talked about the agents and how they did almost all of the marketing on their fishing areas that is done abroad. P4 company's core business is unique in the sense that it is mostly an angling club that serves in the interest of club members while other outfitters are companies in the normal sense of the word. P4 spoke specifically about the strength of the British market where they have strong tradition for fishing:

In Britain there is this group of real hard core fishermen, that is really what has kept us going. I would say that in Britain you have by

far the most real fishermen out of foreign fishermen in general. Over there we have had two to three agents.

P4 talked about the ways of marketing that outfitters in Iceland were doing in his opinion. Relationship marketing through affiliates is a sales channel that every outfitter seems to be using. Relationships are build with direct messages and personal communication. Fishing outfitters keep a tight connection with the best affiliates and are always available through emails or telephone. P4 talked about the market as a whole and how he experiences the marketing:

Lets see, outfitters are using affiliates, most of them have foreign agents the quantity varies but I think everyone has some. Some of them have some type of advertisement, everyone have an online presence but the quality of it is diverse.

P6 talked about a complete lack of a direction in the marketing of Icelandic salmon rivers. He talked about that ninety percent of all marketing around Icelandic salmon fishing begin through Word Of Mouth (WOM) in his opinion. He keeps an active blog and frequently invites fishing bloggers and journalist to come fishing with him. In my opinion his Internet presence is the most professional of the Icelandic outfitters but others have in the last year been updating their webpages for the better. The research's data calls for a coordinated vision on Icelandic salmon fishing and has some ideas about it. P6 talked about it being important for Iceland to form a niche for marketing where the destination puts out its strengths and points of difference to get fishermen to the country:

Niche, this is what we have: A lot of fish, not that big, but the quantity is outrageous, you don't need a double handed rod, you don't need a heavy sink tip like in Norway, you don't need big tubes. You can enjoy casting small flies with light rods in fantastic fly-fishing water almost everywhere. You have clean water, beautiful nature,

and easy access to a country with trouble free environment. You are completely safe, no one will mug you or kill you and you don't need to worry about bears.

P6 talked about the environment being safe whereas in Russia it is difficult to get around, people have been mugged and killed while fishing and transportation can be troublesome. He mentioned bears because in Canada fishermen have to keep an eye out for them. P6 considers there is a need for more advertisements but also explained that advertisements in foreign papers is hard:

I remember last year when we sent out our newsletter, we immediately had responses but like professionals know you get response, you answer and send out the prices and never hear back from them. The market does not realize how much Icelandic salmon fishing costs so in a way this is part of the marketing.

According to P5 his company offers many journalists to Iceland each summer in return for professionally written articles in papers that represents the company and its fishing areas. That is an example of how to use consumer narratives in the marketing material. People like to read stories and articles about their hobby and when they do the effects are better than plain advertising (Tussyadiah, Park & Fesenmaier, 2010). He explained that the cost of renting fishing rights and the fragile environment between fishing rights owners and renters give little opportunities for marketing. P5 talked about the importance of finding the correct affiliates abroad for selling the pristine product which salmon fishing is:

You need to be really pinpointed when it comes to advertising this product. Putting advertisements in a paper does not show good results if any. You must meet an affiliate that has great contacts and get him to talk about and sell your product.

P5 continued:

The best marketing is WOM. You know a person who knows another person and when it is all about the personal experience like in salmon fishing then these affiliates have been proven the best salesmen. They gather up people for a whole group and encourage others to visit the country.

One participant talked about the worst thing that happens is when you loose your customers to other countries because there are substitute products out there:

For example you have a customer and the fishing is not good one year and then its bad again when he returns the following year and he is not satisfied with paying top dollars for that. Then he perhaps decides to go to Canada for way less money and that does it for him. This customer perhaps never returns again. It is very bad to loose people from Iceland.....I know of many fishing areas in Norway and Scotland were fishing is half off compared to Iceland, less fishing for sure but still fine. Good infrastructure and built on old and solid values.

P3 spoke greatly about networking relationship for marketing, meeting the right people and inviting journalists over for fishing in return for well-written articles about the fishing areas.

I travel a lot around the world and have frequent dinner and lunch meetings. Persons that are interested in the fishing show up for these events. I keep a tight connection with the biggest editors of international fishing magazines and with journalists that write both

online and in big newspapers. I have a seat in all sorts of committees that are about management of fishing areas. I am continuously travelling all over to meet wealthy people interested in fishing.

He spoke about promoting the salmon fishing in a correct way with gala dinners and book productions. Public relation and keeping connection with the right people is a big part of his marketing. P3 discussed the lack of vision towards marketing:

I think that many outfitters in the market are doing okay with the marketing but their practices sometimes seem a little uncoordinated. You cannot sell salmon fishing like any other product, this is a high-class product and you have to take care when you are presenting the information, the experience behind it and how to promote it. I always try to publish one or two books each year and in 2014 we have a grand dinner celebrating the twenty fifth anniversary of my company that I am hoping the Prince of Wales will attend to as a guest of honor.

P1 talked about the marketing being about connections with affiliates, WOM and about eighty percent coming from Britain through agents. P1 further explains:

My marketing has a lot to do with agents, I do sales show here and there but not a lot, after over twenty years in this business I have slowly been inviting key anglers who bring with them big groups. I don't do any hard-core marketing that is in the hands of agents, but I have been in this for a long time and consider myself properly introduced.

The participants talk a lot about relationship marketing and the need to know the right agents. Hosting gala dinners and inviting respected journalists and people for fishing can be helpful. There was talk of that right contact delivering many customers

and with affiliates the fishing outfitters have formed a broad base of networking that enables them to sell their product to the desired target group. The participants talked a lot about the fragile framework between landowners and outfitters with river rent being really high and contracts mostly in landowners favor. Outfitters have tried to affect the WOM to their advantage with providing satisfying service. Participants agreed that positive WOM was an effective tool in their marketing as satisfied customers attract others. Participants also talked about the strength of the British market and that most of the fishermen came from there. The next chapter is about the target group for Icelandic salmon fishing.

4.1.1 Target group

Most of the participants spoke about the small size of the target group and the restraints that fact puts on the marketing. The focus group consists of wealthy older individuals, mostly men, and recruitment in this market is difficult due to the high prices. One of the participants explained:

The world of salmon fishing is only getting older and there is a total lack of recruitment of people that have money to go fishing for thousands of pounds.

Another participant agreed that the high average age of clients was a problem and a big reason for slow recruitment is the price tag on salmon fishing. He further elaborated:

So when the salmon fishing is this expensive then it is very difficult to rejuvenate the target group. Almost everyone who comes to Iceland is male over fifty years old that have money and perhaps don't even have to work. Younger individuals do normally not have these amounts of money and when they get older they start to work and have families, all their spending goes into that even if the pay is decent. I

know of father and son programs abroad were the son rod is perhaps half off. That is the outfitters of rejuvenating their client base but the river rent in Iceland is too high to allow such programs.

P1 talked about the difficulty of attracting new customers and with the death of one returning customer perhaps a whole group evaporates. The average age of customer is also increasing and it is hard to track down people with the money and means to do salmon fishing in Iceland. According to the participants the group that is interested in travelling to Iceland and has the money for salmon fishing is around five thousand, one of them had a similar number in mind when he talked about this important factor:

We have around seven billion people on this planet and some think that there is a huge bunch of fishermen out there. The fact of the matter though is that this is not a big group, foreign salmon anglers, and what is worse is that it is not getting any larger. This is only around five or ten thousand persons, the middle-aged man, interested in fishing that has a handful of money. Rejuvenation in this group of foreign anglers is very little. This group is awfully small and we are getting a lot of seventy to eighty five year olds that return every year and have done so for decades. That is the traditional client. The fact is that these clients can only return for a few more years. But that's the way it is and we have tried to use the WOM for our marketing.

When people come fishing in Iceland it is vital that their experience is as good as it gets because the power of WOM is great in an industry with a narrow target group. It is important that customers departing from Iceland are happy because they will probably share their experience. By sharing they are in a way working like a spokesperson for the company and its service. That is in fact the most effective public relation tool the one that's done by happy customers. This WOM reputation is very valuable to the long-term existence of a company (Bruhn, 2003; Chatterjee, 2001; Murray, 2003). The outfitters

opinion on the infrastructure of Icelandic salmon fishing is the subject of next theme in this thesis.

4.2 Infrastructure

Participant talked about continuing progress being made with the infrastructure around Icelandic salmon rivers. There was a lot of talk about the quality of food. Participants agreed that the lodging was very good but there was room for improvement. The safety of Iceland, the easy of transportation and the organizing factor was well managed in their experience. Participants talked about the service of guides being diverse and that there lacked a form of standard or guideline for their profession. In Iceland there are a lot of guides of different quality. There are many who have been fishing for numerous years that do a lot of guiding. Some do guiding as a hobby but I think they are a minority. Most of the best rivers have their local guides that only guide there that allows them to know the river better and be more professional in their job. When asked about the infrastructure one of the participants mentioned contacting customers to get input about their opinion:

We have sometimes had a follow up on the fishermen experience and in a good year everyone is happy and in a normal year fishermen are happy with most things like the infrastructure, roads, the organizing and the fishing.

There are a lot of things that are done in a great manner but most of them talked about the need to standardize the guiding service. One of them said:

That the planning, safety of transportation and the quality of guides has been improving and there has been a raise of awareness with infrastructure in general. But there is room for improvement with the infrastructure and the legal and insurance environment is rather difficult.

According to a participant the fishing lodges, the service and food is absolutely amazing in general and compared to other countries the standard is on another level. It is important that these factors are solid. Another participant talked about that he thought most Icelandic outfitters are doing a good job:

For example the dining part of fishing I think most are doing an excellent job. Everyone has great chefs and all that. But the guiding part could be better, many are doing well but there is definitely room for improvement.

He further talked about putting guides through guiding school in Sweden or putting up some form of standards sheet that guides would work after. Make the guiding more professional. Another participant mentioned that every guide in his rivers has a protocol sheet in his car that the customer can read in case of emergency. Participants agreed that guides needed to go through first aid class to be prepared for everything. They also feel the need for more education and culture around the guiding. P3 said:

We have been thinking about developing standardized tests for Icelandic guides similar to the ones in Britain and the Nordics.

Participants spoke a lot about standardizing guiding and the service in general and one said the following:

We have to offer quality and professionalism, if not for ourselves then for everyone else. Everyone is in it together, if one does a bad job he is not destroying for himself but for everyone in this destination marketing.

Participants talked about good organizing and customers being totally taken care of from the moment their trip starts. The service in general is very good according to the participants of this research. Everything is done to ensure the best possible experience for customers. Outfitters book hotel rooms in Iceland, arrange for travel outside of the fishing time, have fishing gear and cars available. Fishing outfitters can list down their customer's preferences so when they return every detail is according to their taste. These details evolve having the right wines available and how they want their service and food presented. The participants of this research talked about the pricing of salmon fishing and most of them shared similar opinions. Pricing effects are the theme of next chapter where negative and positive sides of the prices are explored.

4.3 Pricing effect

The participants of this research did not all agree on the effect that pricing of the salmon fishing had on the market. Some considered it positive while others were on the more negative note. In Iceland salmon fishing for one rod per day can cost from around a hundred pounds up to three thousand. It all depends on the catch statistics of a river and the time of the fishing season. The cheapest is perhaps a river in a poor time of season where few salmons are caught every year. According to a research in 2009 the average cost for one day of salmon fishing in Iceland was just over two hundred and fifty pounds (Steinsson, 2010). Some talked about the pricing being approximately where it is supposed to be while others spoke of a disorientated market. Because of this difference of opinions this chapter is divided into two categories, positive and negative effect of pricing.

4.3.1 Positive effect of pricing

The fishing outfitters did not all share the same opinion about the pricing of salmon fishing. One participant explained that a certain group of people is not sensitive to high prices:

The pricing for salmon fishing can in my opinion be split into three categories. We have the extravaganza, high end product that is more expensive than the main bulk of the market. If we talk about that expensive category for example I do not think it matters whether people pay five or six thousand pounds for three days of fishing. In their case the pricing does not matter at all.

The participant continued:

Then we have the product, semi expensive rivers like Nordura, Vididalsa, Midfjardara, Vatnsdalsa and most Icelandic salmon rivers fall into this category. Great fishing, good infrastructure and dare I say reasonably priced. This category holds the bulk of foreign fishermen that travel to Iceland and I think these clients are the most sensitive to price changes.

According to P3 it is simplifying things a lot to say that fishing licenses are too expensive. It needs to be put in context with the demand of the product that is being sold:

This is a rather complicated because the most expensive places are the ones that sell out first. The question is are we doing this correctly? The foreign fishermen coming all the way to Iceland want to fish the prime time and they want value for money. They do not want the days in the end or beginning of the fishing season (time when fishing can be slow). When I started back in 1965 there was talk about the fishing being too expensive and people still talk like that. The thing is though that this always sells the demand for the product is so high.

P3 further elaborated that more and more people in the world are getting wealthy and those people want to buy high-end luxury products. According to P3 that is the target group for Icelandic salmon fishing but perhaps Icelandic outfitters have not been efficient enough in building up this group. Young people think that the prices are insane and they do not have the revenues to buy this product. In the next chapter the negative effect of pricing is explored.

4.3.2 Negative effect of pricing

The other participants had a different story to tell, they said that pricing and its fluctuations is harmful for marketing to foreign fishermen. They talked about the uncertainty in Icelandic currency policy creating imminent threat for outfitters as one explained:

I think that the pricing in itself is not the main factor, I much rather assume that the fluctuations of the pricing is the deterrence factor. If you bump up the prices twenty five percent for customers then you are insulting them no matter how much money he has. I think that is the biggest factor the uncertainty and unstable financial system. That is not only reflected in rising and falling river rents for outfitters but also the volatility of the currency. The river renting agreements are bound to price index so a bomb in Arabia can cause prices for fishing licenses to go up. It is self explanatory that business is challenging in those circumstances.

P6 spoke bluntly about the market being far from normal in his opinion:

Let's see, the prices are just to high that is a fact. But then you could say that it is just a matter of supply and demand, but that has changed. Now the demand is not as high as it used to, it used to be way more demand than supply, the supply was fixed but the demand

kept on growing and the price with it. The tables turn when the supply is more than the demand but the prices still go up. Completely twisted market!

When asked if the prices have a negative effect on foreign fishermen he added:

Yes definitely, I have no count on how many emails we receive where people want to come salmon fishing but after our reply we don't hear back from them.

P5 considers the pricing a very vital part of the marketing. He also spoke about pricing in a broader economic context and said that the European crisis hit Icelandic fishing outfitters:

It has a significant effect, especially because the fishing is up to nature each year. I have noticed that returning clients have been swallowing a little price increase regularly but in the end they just give up. The global economy of course also has a say in the matter, for example Spain that has been a really strong market, perhaps the second strongest until last year. Then it completely collapsed, not by ten percent but ninety five percent. The financial crisis in Spain is a factor and to add on that our prices have been going up. Perhaps this group will not return.

P2 also talked about the collapse of the Spanish market and said that instead of greeting some dozens within a handful came in his rivers last year. They are way more sensitive to price changes than British customers. Another one talked about the impact of pricing and that in his opinion foreign clients considered Icelanders to be greedy:

Usually they think that Iceland is expensive and just too expensive, they complain a little bit about the price and when you go abroad Iceland has the reputation of being expensive and Icelanders as being penny pickers. But that all disappears when the fishing is good, I don't know how to put it, when the fishing in Iceland is good you hear less of this but in bad years customers feel as they are overpaying. To sum it up, Iceland is considered expensive, a normal European fisherman passes out when he hears the prices because it is more for wealthy individuals.

The participant did not think that Icelandic salmon fishing rivers were pricing themselves out of the market:

No, not at all, Icelandic rivers have great fishing and fishing in other countries has crashed, that is the situation. The market is coming to us despite the fact the fishing licenses are getting more expensive.

Even though Icelandic fishing outfitters do not all have the same opinion on the effect of pricing on the market most of this research's participants think the prices are too high like this chapter has shown us. When prices are too high the demand drops down and some outfitters talked about it being a struggle to sell their fishing days. Implications for management and marketing could in my opinion be that the farmer would put a part of each year's payment directly to marketing. Either they would get outside help on which way to use it or have the outfitters bring it to use for the future good of their salmon rivers. The environment between the outfitters and landowners could also be improved with better agreements. In order for the outfitters to see value in putting actual money for the marketing the environment has to be stable. More stable environment in my opinion means longer contracts where it makes sense to put money into the marketing because there is room to do so. Longer contracts also mean that when the marketing starts to deliver the same outfitter has the river that put in the

money. The next theme of the research's data is the fishing culture in Iceland, how it has been evolving and in what ways it affects the marketing.

4.4 The fishing culture

Over the last twenty years Iceland has seen enormous changes around the country's fishing culture. The catch and release statistics have been increasing quite steadily while a few years back almost everything that was caught was killed. The trend of catch and release is moving angling tourism closer to ecotourism. It used to be more consumption but in recent years every third fish is put back into the river alive. Participants spoke frequently about this change in the interviews and one of them stated:

It used to be a problem back in the day when we had groups mixed of foreigners and Icelanders fishing together with mixed bait (example, worms, flies and spinners). I personally last noticed this in river Midfjardara in 2004 when you could fish with fly and worm there, Icelanders shared the river and lodge with foreigners. This has changed drastically because now there are such few rivers where you can still fish with worm so I don't think it has significant impact. I don't think the fishing culture has discouraging effect on the marketing but perhaps it did ten or twenty years ago. I can take river Langa as an example; fishermen are not willing to catch and release their fish if the following group is wormers.

This change means that there are fewer conflicts between customers fishing the rivers when the culture is more modest. P4 felt significant changes in the fishing culture in the recent years and spoke about it being a great thing that has positive effects on the marketing of Icelandic salmon fishing:

Improving, improving, improving and improving. Most foreign fishermen that visit this country really oppose big quantity fishing,

worm fishing, fish killing and so on. Many of them are older men who are nature and animal conservationists. These fishermen only do fly-fishing and have for a long time. The quantity and worm fishing has been a thorn in their eyes. I saw that when I guided in 1985 to 1990 that this factor bothered many. Icelanders and foreigners are positive towards these changes. That delivers more satisfied foreign clients.

According to P6 outfitters should take care when preparing promotional material and make it visual that the fishing culture is improving. He talked about some mistakes being made in his opinion:

I think we are making a mistake when we publish pictures of dead fish. Of course there are fishermen that want to kill their fish but you will not shock them by posting photos of live fish but the fishermen that catch and release can be shocked when looking at photos of dead fish. Catch and release is definitely on the rise not to mention with people that travel for fishing. They have a great protection perspective because they have seen the destruction elsewhere, watched fishing areas come and go. Seen there home fishing grounds going to waste. I have heard many talk about this, why do you have all these dead fish, why are you killing all this fish and I think it still is a part of the culture.

Another participant did not have such a strong opinion about the fishing culture and talked about it being best if people constrained themselves and tried to avoid any form of extremes:

The fishing culture, well it is all right I guess. Fishermen are starting to take better care but I have no extreme thoughts towards catch and release, I think that it is important to avoid greed, release big salmon but still take something to eat; I think quota is the way to go. The new

generations of fishermen have no problem practicing catch and release but it is more difficult with old dogs that consider that stupid but I think their views are changing. All in all I think that the current situation is okay.

P1 talked about that foreign fishermen were starting to notice the change in Icelandic fishing culture:

Yes, to them releasing fish is not difficult and many of them release everything, but then I have some clients that have been coming for a long time that find it difficult to return home without any fish and then I allow them to kill fish for eating. I also know for a fact that foreign fishermen buy smoked salmon in Reykjavik.

One participant mentioned that with more catch and release the fishing itself is improving because released fish can be fished again and in the end there is more fish to spawn in the river. With more fishermen practicing catch and release there is more fish available which gives better end results. I think it is vital to look at the outfitters opinion here because their views are a little bit different. In order for Iceland as fishing destination to do better it is important that the country forms a united front. Even though an outfitter is not opinionated on the catch and release matter it has an appeal to the market. Therefore he should do his part to have a positive impact on that trend in his rivers. According to the participants the fishing culture in Iceland is evolving for the better but there is still space for improvement in some areas. Participants agreed that better fishing culture is a positive thing for every stakeholder on the market as well as the fishermen. In the next chapter participants opinions on the image of Iceland is explained and how it affects the marketing of Icelandic salmon rivers.

4.5 Iceland's image

In this research participants mentioned the country's image as a vital part of its marketing. P2 said that the image of Iceland and especially the safety stamp that it has is a very important factor in the marketing of Icelandic salmon rivers:

Definitely, people want to get away, in solitude and purity. Thankfully most of our rivers are away from the biggest tourist places, for example there are no rivers around the Golden Circle. People have never been so completely alone but yet in an accessible river. As people get older they stop going fishing in Russia and Argentina. Globally Iceland is very well located with shorter travel and easy accessibility. Here fishermen can be completely safe and they can put their full trust in the infrastructure. In Russia for example the life insurance of Americans used to drop out as soon as they step foot on the Kola Peninsula because it was treated as a military zone. That is a major factor for a person with a lot of money and family counting on him and really just for everyone.

Participants talked about that the country's image helps with points of difference for the destination and one of them talked about the unique combination of wild nature, purity and safety:

Yes, because research has shown that Iceland's image is purity. The North has this stamp, being pure, unspoiled and all that and you can see other countries using Iceland in marketing their product to send out promotions about freshness. Iceland is fresh, you walk out of the plain and take a big breath and the air is just fresh. Clean water. Fishermen just want to get away, countless research have shown that being the number one reason for fishing. That is a part of it.

P3 and more Icelanders have been the frontrunners in protecting the Atlantic salmon. P3 thinks that these conservation projects help improving the image of the country:

I use Iceland quite a bit. What are our main features? We focus on conservation, limited exploitations, limit the fishing days, fishing hours and amount of rods per river, all with great modesty.

The image of the country is positive and outfitters try to use it for their advantage. I think that factor in the marketing can be improved even further by focusing on Iceland's strengths and what it has to offer. Fishermen want to come here to relax and fish in pure and unspoiled nature.

According to the findings and discussion chapter prices are high but the low currency exchange rate of the krona makes the fishing affordable to foreigners. Prices are sensitive to fluctuations of the currency, which proposes a problem for both outfitters and anglers. The product Icelandic salmon fishing is very accessible and Iceland is safe and easy to get around. Icelandic salmon fishing has clear advantages over other countries with Atlantic salmon fishing in crystal clear rivers, beautiful fly fishing waters and huge quantity of salmon eager to take the flies up on the surface of the water. The surface fishing for salmon is unique. Icelandic rivers can be fished in an exiting way most of it with light tackle and floating lines. Icelandic salmon fishing main promotion channels are through the word of mouth, direct marketing and Internet marketing. A lot of the promotion is the hands of affiliates or agents that do most of the marketing for Icelandic outfitters. The market runs on returning customers and like in any other business maintaining clients is far more cost effective than constantly seeking new ones. The opinions and views of the participants are summarized in a figurative way in Table 3 and the following chapter is a summary of this thesis where its findings are rounded up in a targeted text.

Table 3 Short summary of participants views according to themes.

Summary table.	Experience of marketing	Effects of pricing	Ideas on fishing culture	Iceland's image	Infrastructure
Participant 1					
	Random and of amateur level. Word of mouth (WOM). Mostly done with affiliates and agents.	Fluctuations in currency makes marketing and pricing hard. Unstable economics factors.	Fishing culture has no big effect on marketing. Catch and release results in a more valuable product.	The image is safe and clean and helps with marketing.	Good fishing lodges and service. Guides are improving.
Participant 2					
	Lack of coordination. Agents and affiliates is the main channel. WOM.	High prices do not effect a part of the customers. Main bulk is sensitive to price increases.	Catch and release helps. The culture is becoming modest and changing for the better.	The image helps a great deal. Big country, clean, few inhabitants and no pollution. Very positive image.	Good food and service. Guiding and service have been improving significantly in recent years.
Participant 3					
	90% WOM. Internet marketing and newsletters.	Prices are way to high. Prices scare off customers. Against low prices but thinks the balance should be lower.	The culture is improving but there is still too many salmons killed. Censor posted pictures.	Purity. Unspoiled with fresh air. People want to come fishing in Iceland.	Great food. Great infrastructure. Guides need to be better informed.
Participant 4					
	Britain is the best market. Big use of affiliates and agents WOM is the best marketing.	Has a tremendous effect. Price fluctuations are bad. Unstable currency does not help.	Fishing culture is improving.	Very positive image. Need for finding ways to better capitalize on the image.	Good infrastructure. Demand for guideline for guides.
Participant 5					
	Relationship marketing. Use affiliates and contact the right people. Books and journalists.	Prices are according to the high end product that Icelandic salmon fishing is.	Used to be very bad. Has improved greatly. Is rather good now but is still improving.	The image is very positive. Everyone wants to fish here. Good fishing and modest exploitation.	Good food and lodging. Guides need to be well trained and polite.
Participant 6					
	Contacts and affiliates. Positive WOM. Britain is the best market. No hard core marketing.	Too expensive but the product is unique. The river rents are too high.	Fishing culture is okay. More in favor of quotas than only catch and release.	Reputation of being expensive In general the image is good. Clean, safe and solid.	Good organization. Solid service and good food. Lack of information flow.

6. Summary

Icelandic outfitters view the marketing of their domestic rivers as being rather random. The main channel of promotion is marketing through affiliates. Many are doing good things with inviting the right people fishing like journalists and fishing bloggers. The right contacts can deliver many customers and outfitters then work hard to retain them. The outfitters all strive to get excellent results when it comes to the whole infrastructure, service and food. The target group for Icelandic salmon fishing is small and there are obvious difficulties with attracting new clients. Fishing licenses are expensive and the rejuvenation is slow. The outfitters experience the contracts between landowners and outfitters as being fragile and the river renting cost as being too high. They explain the difficulty in seeing the value in marketing a destination if you do not have control over it when the actions start to deliver customers. I have suggested that, either farmers would put fixed amount for marketing each year and that landowners and outfitters should be more careful when signing contracts. If outfitters would get longer contracts and feel that their status would be secured then perhaps they would see proper value for marketing.

There are a lot of good things about the recreational salmon fishing in Iceland. The river management system in the country is considered one of the most successful in the world. The country has an abundance of crystal clear rivers full of Atlantic salmon. One of the most distinguishing feature of Icelandic salmon fishing is the fish willingness to rise to the surface for bait. There is a definite value in the image of the country. The outfitters general view of the image is that its safety, clear rivers, ease of access and unpolluted nature are the main features. These features could be further capitalized in the marketing material for the country's fishing. The outfitters have to realize that it is their combined work that forms customers' opinion of the destination.

The trend in international recreational angling is moving towards sustainability and modest use of natural resources. A big part of that trend is the growing popularity of the catch and release method. With catch and release fish is put back into the water

alive after it is caught. That results in more salmons in the rivers that are caught again and spawn in the end of each season. In Iceland about thirty percent of caught salmons are released back in the water.

In order for destinations to become and remain successful all stakeholders must run in the same direction and be consistent with the message they send out. With a coordinated vision the destination, Iceland, will blossom because it has a lot of strong unique factors that could be used to gain competitive edge. From the things mentioned in this summary chapter the future for Icelandic salmon fishing will be bright if appropriate actions are taken.

7. Further research

This thesis is the first to investigate Icelandic salmon rivers and the marketing that is done around them. The findings provide a solid contribution to the field of destination marketing for fishing. For future research it would be interesting to study the opinions of landowners, the other stakeholders around salmon rivers. The beginning of data collection could involve qualitative research with in depth interviews or the use of focus group. Following that a quantitative research where a question list would be sent out by the Icelandic Farmers Association to all their members. That would give the research both depth and generalizing power. Another interesting subject would be a quantitative research where Icelandic anglers and foreign anglers would give their input of the domestic salmon market. In order for the question survey to be effective it would also be useful to form focus groups on that matter. It would also be useful to study Icelandic trout fishing from a marketing point of view so there are a lot of subjects that could be investigated and learned from.

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Appendix 1

What is your experience with the marketing of Icelandic salmon rivers to foreign customers?

How is it in general?

What is your description of the marketing?

What is done with good results when it comes to the salmon fishing for foreign customers?

What do you think Icelandic outfitters can do better when it comes to the service and fishing?

What effects do you think the Icelandic fishing culture has on the marketing?

What do you feel about the catch and release practice?

What is your experience on the effects that prices of Icelandic salmon fishing has for foreign customers?

What do you feel is the back way of attracting new customers to Iceland?

What are your thoughts about Iceland's image and does it play a part in the marketing in your opinion?

What do you feel is the reputation of Icelandic salmon fishing to international customers?

What do you wish to add?

To probe and get deeper answers I for example used:

Can you give an example?

Please explain further?

Why?