



2023

TOWARDS MORE TOURISM

- A joint effort for growth, innovation and responsible tourism

VISIT GREENLAND'S MARKETING AND MARKET DEVELOPMENT STRATEGY 2020-2023

VISIT GREENLAND'S STRATEGY IS A PART OF THE NATIONAL TOURISM STRATEGY

2023

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Tourism is one of the fastest growing industries in the world. In 2025 the number of international tourist arrivals is expected to reach 1.6 billion a year worldwide. At the same time this growth is happening there is an increasing focus on the effects that tourism brings, positive as well as negative.

In Greenland there is a large political focus on developing tourism through the national tourism strategy and along with tourism we want increased economic growth, more jobs and sustainable development of our society.

With the construction of the new international landing strips and airports in Ilulissat, Nuuk and the regional runway in Qaqortoq, the foundation has been created for increased tourism in Greenland. But

the benefits do not come by themselves. To make Greenland more accessible to potential and existing markets will also require that we prepare for welcoming our tourists and invest more resources both when it comes to attracting tourists and handling tourism nationally, regionally and locally. In November 2018 the entire Greenlandic tourism industry gathered at a conference where wishes for future tourism development were discussed and the discussions resulted in 11 recommendations for responsible tourism development.

This strategy is to a large extent an extension of the wishes of the industry as well as the goal of Visit Greenland to create responsible tourism development focusing on sustainability, economically, socially and environmentally. The strategy of Visit Greenland is primarily about marketing and market development within the framework set out in the strategy of Naalakkersuisut which relates to the framework for the industry.

11

RECOMMENDATIONS FROM TOWARDS **MORE** TOURISM 2018

1. Develop strong, cohesive tourism strategies both national and regional
2. Continue to develop year-round tourism
3. Regularly review and improve the tourism policy framework
4. Integrate sustainability into education and business development
5. Ensure a relevant, national certification system that addresses quality, safety and environmental concerns
6. Secure smoother access to tourism workers through legislation
7. Align available funds with the increased focus on tourism development
8. Plan public infrastructure to cater for both locals and tourists
9. Ensure a coordinated national tourism effort on developing digital tourism services
10. Strengthen regional marketing organisations and strategies
11. Educate and engage locals in the value of tourism - and incorporate this into strategies



Photo: Mads Pihl - Visit Greenland

VISION

We help create economic growth, jobs and the sustainable development of our community by making Greenland an internationally known and sought after adventure destination with a focus on quality, safety and sustainability.

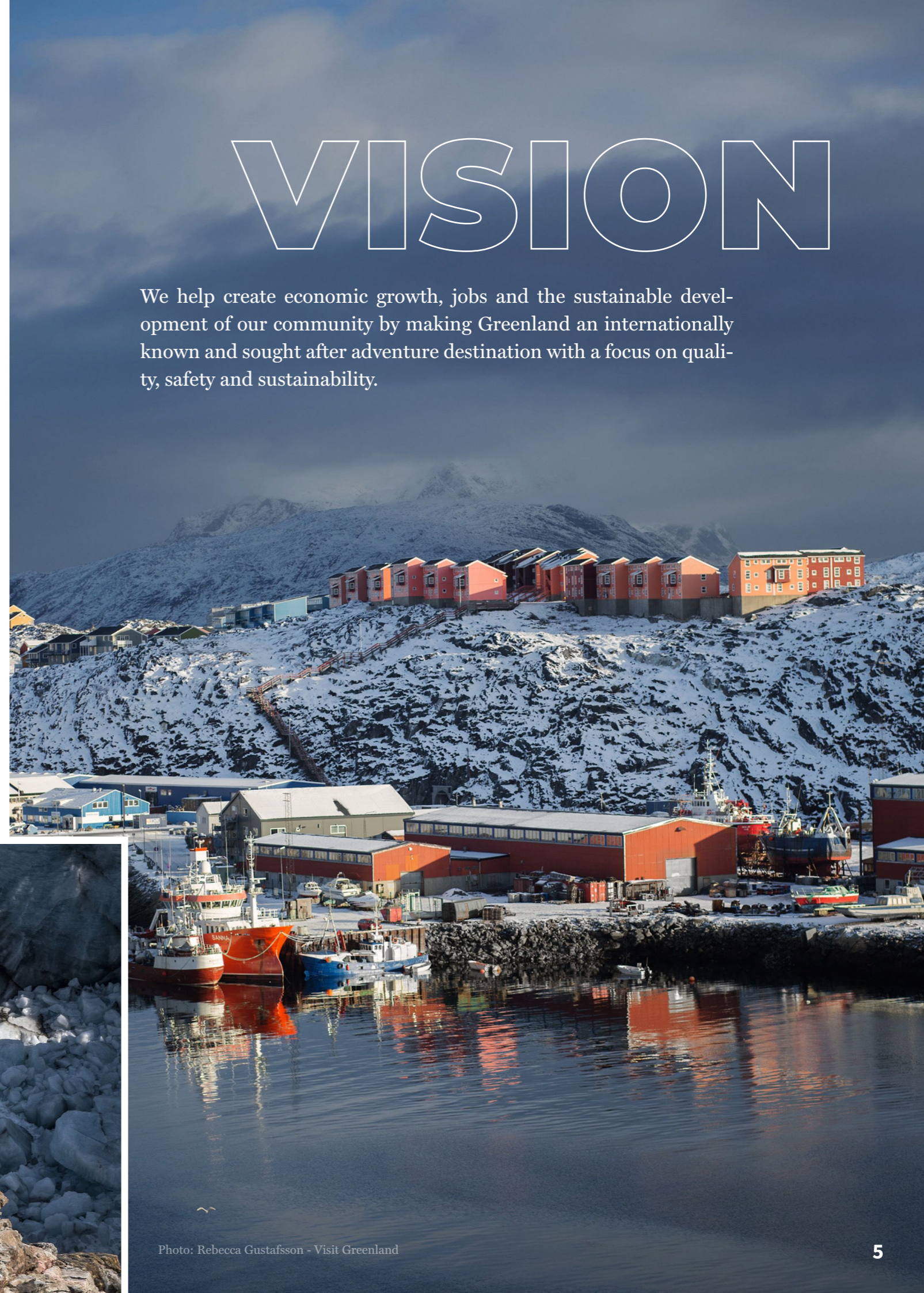


Photo: Rebecca Gustafsson - Visit Greenland

ABOUT THE STRATEGY

TOWARDS 2023

Greenland has, with the decision to build three new airports, chosen to focus wholeheartedly on more tourism.

A NEW STARTING POINT FOR TOURISM

In 2016 the Government of Greenland launched its strategy “What it takes” focusing on creating more favorable conditions for tourism development. This was done through a change of cruise fees, planning new international runways, establishing landing infrastructure for cruise ships, promoting private investments in the experience and receiving apparatus, the start-up of visitor centers, market development via Visit Greenland and business initiatives.

At about the same time Visit Greenland launched its strategy with five must win battles and the goal to make Greenland more visible to adventure tourists - a tourism form that is rapidly growing internationally and that offers the most value for the local community, minimizes environmental impact and is considerate of local culture.

In the period 2016-2018 Greenland saw a growth in the number of tourist overnight stays (incl. DK) of 10.8%¹, a growth in the number of international flight passengers (incl. DK) of 3.3%² as well as a significant increase in the number of cruise passengers of 88.7%³.

With this positive development it is now time to look forward towards 2023.

In this period Greenland developed from a globally unknown tourist destination to

being listed as one of the most important destinations in a variety of well-known online and print media. This has created a new foundation from which to reap the rewards of increased interest and open even more people’s eyes to our unique destination.

Visit Greenland sees its role as influencing tourists in their decision-making process, where Greenland arises as a possibility and where the tourist seeks information on travel experiences. Once the tourist has a concrete interest in Greenland it is up to the commercial partners and destinations to convert the increased demand to a travel experience.

With greater accessibility to and in Greenland and increased tourism it is obviously important that we take good care of our nature and our small communities in villages and settlements.

That is why, through dialogue and cooperation with the stakeholders of the industry, we aim to ensure that Greenlandic tourism development is based on a sustainability approach in order for tourism to help contribute to a positive development of our society, both for tourists and the local population, through economic growth, employment and more experience opportunities.

Greenland will be the place for the tourist who wants an authentic and unique experience with varying degrees of physical activity and cultural immersion. This means that we must be skilled at developing our products for this type of tourist and what they demand.

At the same time it is necessary that our experiences are developed all year round, so our guests come both in the summer and in the winter, stay longer and spend more money. Not least, it is crucial that our tourists feel that the quality matches the price of the experience. That is why it is important to create a quality scheme to ensure continuous improvement.

With the prospect of significantly increased accessibility in 2023, now is the time to create a joint effort for growth, innovation and responsible tourism.



Visit Greenland sees its role as influencing tourists in their decision-making process, where Greenland arises as a possibility and where the tourist seeks information on travel experiences. Once the tourist has a concrete interest in Greenland it is up to the commercial partners and destinations to convert the increased demand to a travel experience.

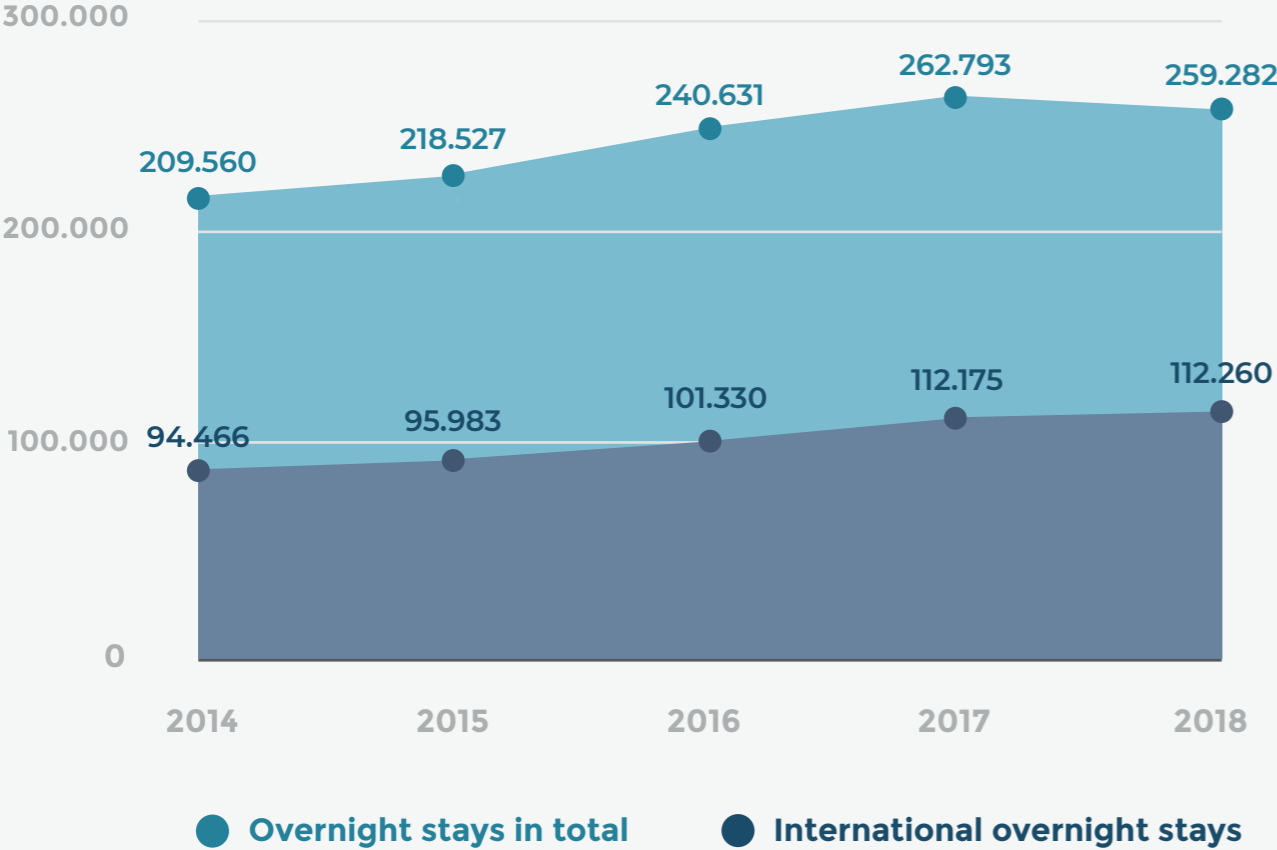


Photo: Peter Lindstrom - Visit Greenland

¹ Source: bank.stat.gl/tudhot - the category *Unknown* is distributed proportionally between the country segments
² Source: bank.stat.gl/tudfly - the category *Unknown* is distributed proportionally between the country segments
³ Source: bank.stat.gl/tudkrp

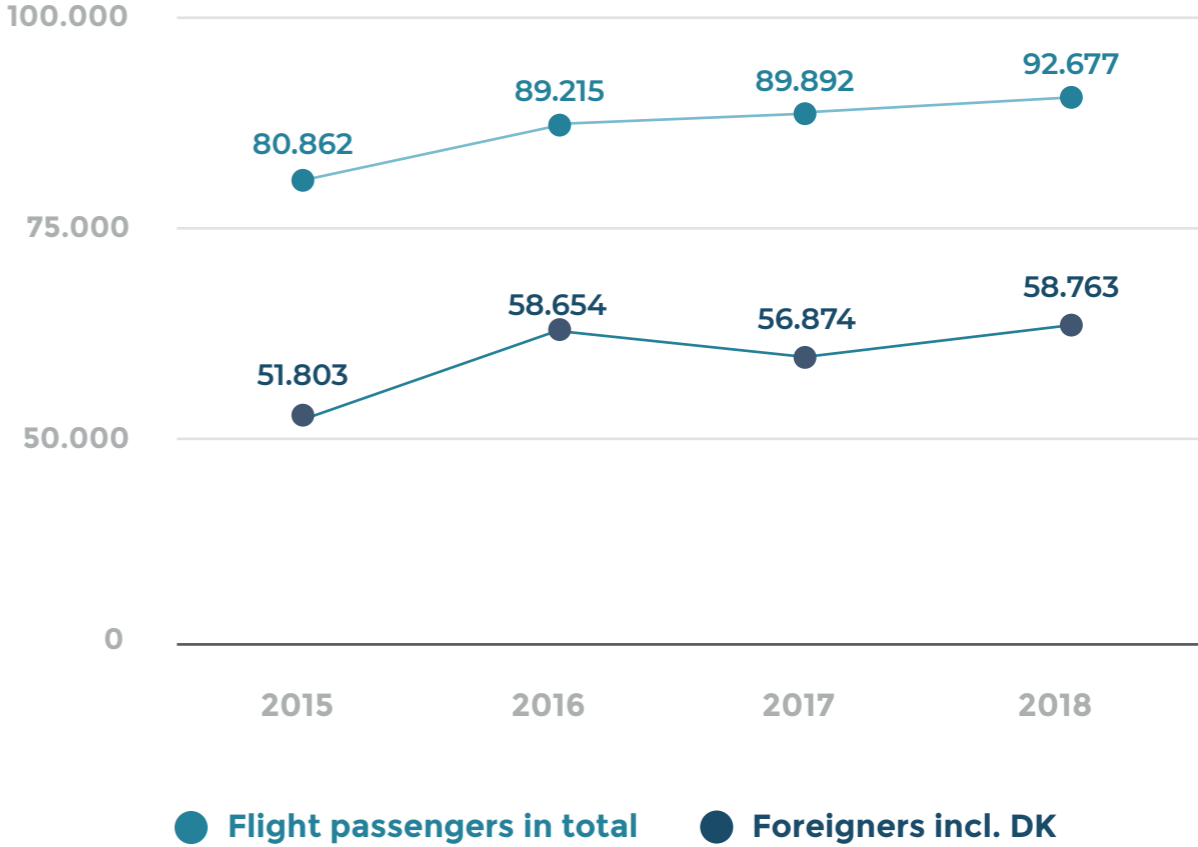
Statistics Greenland gathers tourism statistics on the number of overnight stays, flight passengers and cruise passengers.

Number of overnight stays in accommodations in Greenland 2015-2018 - in total vs. international



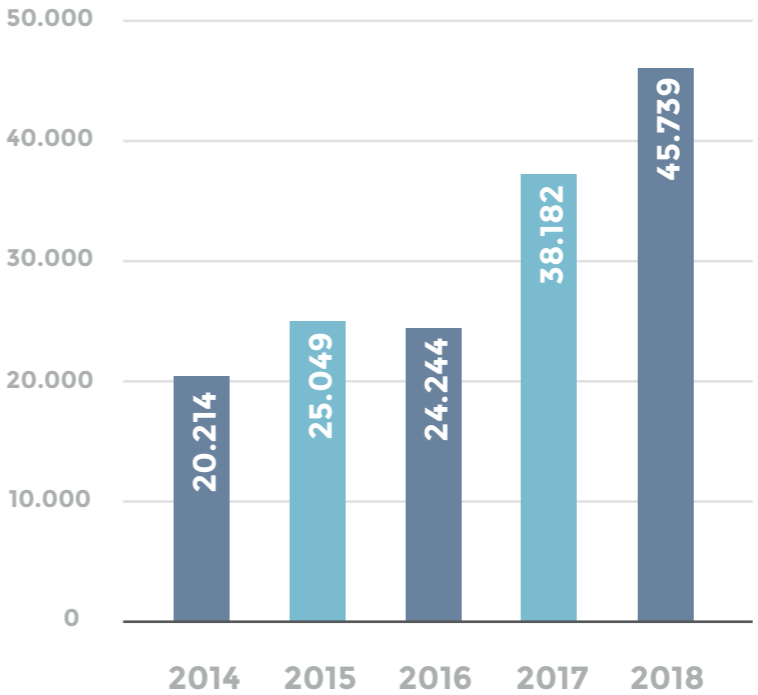
Please note: Non-registered (the 'Unknown' category) is distributed proportionally between the country segments.

Flight passengers travelling out of Greenland 2015-2018



Please note: Non-registered (the 'Unknown' category) is distributed proportionally between the country segments. Registrations by country of residence have only been carried out since July 2014.

Number of cruise passengers in Greenland 2014-2018



Since 2012 Visit Greenland has regularly conducted interviews with tourists in Greenland. In the period 2012-2015 the average 'Overall satisfaction' with the experiences in Greenland was 4.7 on a scale from 1 to 5. In the summer of 2017 Visit Greenland once again conducted a number of interviews and here the average 'Overall satisfaction' was also 4.7.

4 MUST WINS TOWARDS 2023

**#1 Increase demand from
adventure tourists**

**#3 Knowledge sharing and
competence upgrade**

**#2 All year-round tourism
in all of Greenland**

**#4 Promote favorable
framework conditions**

METHOD

Sustainability has become a must for every tourism destination and important in order to sustain a competitive advantage in a growing global industry.

In order to create the best framework to implement responsibility and sustainability in the tourism industry in Greenland and to ensure that we make the right decisions for Greenland, our nature and population, the work of Visit Greenland focuses on four overall must wins. Though our strategy only extends to 2023, our tourism development

work extends much further. These must wins will be our benchmarks for a sustainable development of tourism and will show us the right path to a better future.

This strategy will be supported by annual action plans that allow for specific tasks to be planned while also taking into account newly arisen needs and tasks.

In our work with the 4 must wins Visit Greenland has chosen the following four sustainable development goals with associated sub-goals which we will fulfill in our strategy for 2020-2023.



SUSTAINABLE TOURISM

“Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities.”

Source:
UNWTO - World Tourism Organization

BACKGROUND

This tourism strategy is based on an extensive amount of research, analysis as well as background knowledge such as:

- ▶ Focus groups
- ▶ Workshops and meetings with important stakeholder groups
- ▶ Tourism capacity analysis
- ▶ Specific analysis in connection with Greenlandic experience products
- ▶ Obtaining knowledge from conferences/meetings about adventure tourism, branding as well as digitalisation
- ▶ Studies of tourism development in the Nordic countries, especially Iceland and the Faroe Islands
- ▶ Research of international certification schemes
- ▶ Review of the strategies of other countries
- ▶ Previous visitor surveys, economic figures, annual reports, attitude surveys etc.

VISION

We help create economic growth, jobs and the sustainable development of our society by making Greenland an internationally known and sought-after adventure destination with a focus on quality, safety and sustainability.

MISSION

Visit Greenland conducts targeted and prioritized international marketing of Greenland towards the adventure segment, and works to promote responsible tourism with a focus on innovation, growth and sustainability in cooperation with stakeholders in Greenland and partners abroad.

4 MUST WINS



Meeting and conference guests spend three times as much per day compared with leisure travellers. They primarily travel in the shoulder season and the winter season and contribute with knowledge and network.

Source: Visit Denmark

Increase demand from Adventure Tourists

Why Adventure Tourism?



Source: Bannikin.com and adventuretravel.biz

Greenland is a unique tourism destination. It is our belief that there is room for far more tourists that want to experience our magnificent nature and gain insight into Greenlandic culture and experience the authenticity for which our country is known.

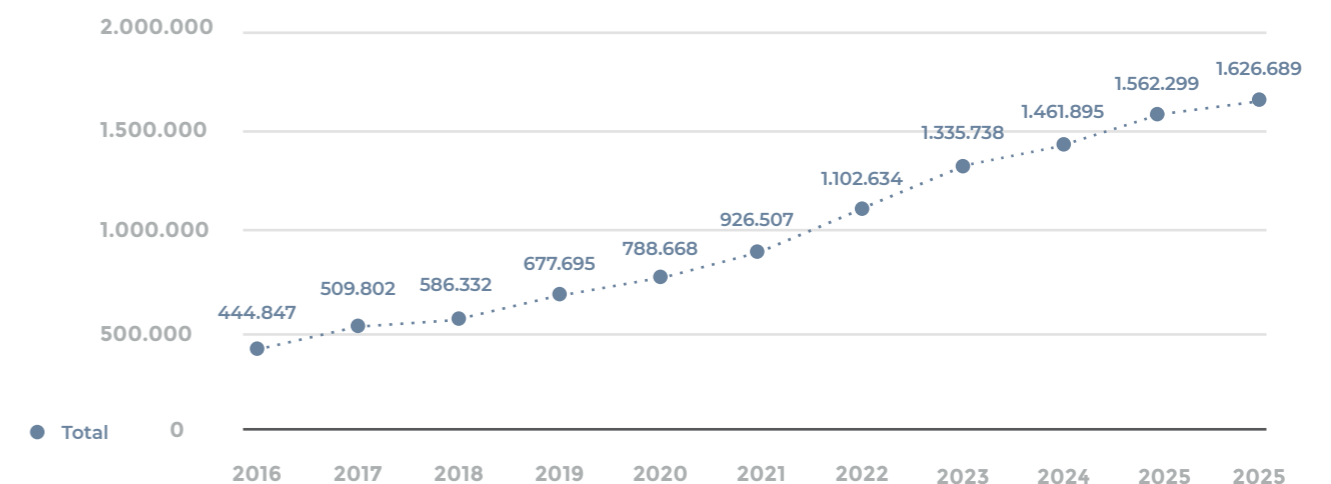
Visit Greenland sees its role as influencing tourists in their decision-making process, where Greenland arises as a possibility and where the tourist seeks information on travel experiences. Once the tourist has a concrete interest in Greenland it is up to the commercial partners and destinations to convert the increased demand to a travel experience.

In order to attract tourists to Greenland before the new Atlantic airports open, our visibility work must be strengthened. A “reason to go” must be created for the tourist that today still does not have Greenland on their list of possible travel destinations. If the visibility work is not strengthened, the risk is that not enough revenue will be created before the airports open and in the years thereafter.

Adventure tourism is the fastest growing form of tourism and it fits well with Visit Greenland’s strategy for responsible tourism with a focus on sustainability. From being a niche market only a few years ago, according to Technavio.com adventure tourism is headed toward a market share of 36% of global tourism in 2020.

According to Allied Market Research the global growth in adventure tourism will be between 13% and 21% towards 2023, after which the growth will stabilize at a lower level:

The Global Adventure Tourism Market according to type, 2016-2026 (mill. \$)



The Adventure Travel Trade Association defines adventure tourism as containing the elements nature, culture and physical activity from very light to physically hard activity. Adventure tourists contribute 65% of their total travel expenses to the local community thus helping to create growth, jobs and experiences. That is why it is important for us as a tourism destination and as an industry to adapt our products and services to match what is sought after by adventure tourists.

In order to attract more visitors and maintain interest, the quality of tourism products and the delivery of experiences must serve as the foundation for the development of tourism in Greenland. A quality scheme with a focus on safety, good service and environmental and cultural considerations would make the industry better suited to constantly improve and reap the rewards of this improvement.

Cruise tourism is increasing significantly. Visit Greenland will monitor cruise development in Greenland in order to identify the optimum framework for sustainable development of cruise tourism.

Main Initiatives Towards 2023

- ▶ We will market Greenland according to our vision to make Greenland known and recognized as an adventure tourism destination with a focus on sustainability.
- ▶ We will work to realize a branding campaign in the years 2021-2023. The goal is to obtain the largest possible visibility as a tourism destination in the prioritized markets up to the opening of the new airports.
- ▶ During the strategy period we will develop a national quality label scheme that will be launched if sufficient funds are allocated for this.
- ▶ During the strategy period we will focus on the end customer directed effort (B2C) through further development of the website visitgreenland.com.
- ▶ During the strategy period we will focus the business directed effort (B2B) and market development on the main markets: Denmark, Germany, Great Britain, France and North America.
- ▶ We will research and prioritize efforts in the developing markets: South Europe, Asia and the Benelux Countries. Furthermore, it will be examined if an increased marketing effort can be established with Icelandic operators and in the countries from which Iceland receives tourists.
- ▶ We will organize familiarisation trips (FAM-trips) and events for international travel agents and ensure collaboration between Greenlandic and international travel operators.
- ▶ We will participate in the most important travel shows and workshops in our prioritized markets. Some of these are: Midatlantic, 5-Countries Workshop, Paris Nordic Workshop, ITB Berlin, Vestnorden, Seatrade Cruise Europe, ATWS, DTTT

Global, NATA workshops and the AECO conference.

- ▶ We will participate in other events when it fits with the tourism development goal and will also prioritize participation in the Government of Greenland's business promotion abroad.
- ▶ We will collaborate with all representations about initiatives that may help create connections and visibility about Greenland as a tourism destination in the countries where the representations are located.
- ▶ We will continue our collaboration with the Nordic visit organisations via Nordic Tourism Working Group and collaborate with Visit Denmark and Wonderful Copenhagen.
- ▶ We will continue the NATA - North Atlantic Tourism Association - collaboration between Iceland, the Faroe Islands and Greenland whose main tasks are to organise Vestnorden Travel Mart as well as the administration of the support scheme for tourism development, marketing and cultural exchange.
- ▶ In 2021 we will be in charge of the running of Vestnorden Travel Mart in Greenland. The travel mart will see the launch of the branding campaign which is to attract more tourists to Greenland when the new airports open in 2023.
- ▶ In 2020 we will organize a cruise seminar and follow up on a closer dialogue with all relevant stakeholders, among others AECO – Association of Arctic Expedition Cruise Operators that works for sustainable cruise operations in the Arctic.



GOALS

of visibility and international market development:

- ▶ An annual growth towards 2023 in the number of international overnight stays of approximately 5%.
- ▶ It is a goal for visitgreenland.com to increase its number of unique visitors with 15% annually in the strategy period.
- ▶ Annual growth in the number of agents that sell Greenland, either existing agents selling new destinations or new agents – the goal is 3 new destinations/agents.

Visit Greenland is working to make tourism an all year-round industry. By distributing tourism in both summer and winter as well as in the shoulder seasons planes and accommodations are filled up and experiences can be offered throughout the entire year. This creates revenue in the entire value chain from agents, travel agencies, incoming, accommodations, to tourism operators and souvenir shops, guides, museums etc.

Once the demand is established, there will be a greater incentive to attract a year-round workforce and a greater incentive to train in tourism. Thus, there are a number of positive effects derived from investing in year-round tourism.

The development of new winter products is necessary and especially Dark Sky tourism, which Visit Greenland has communicated to the industry, is interesting to pursue, as this particular phenomenon has helped attract guests to Arctic destinations in the winter period.

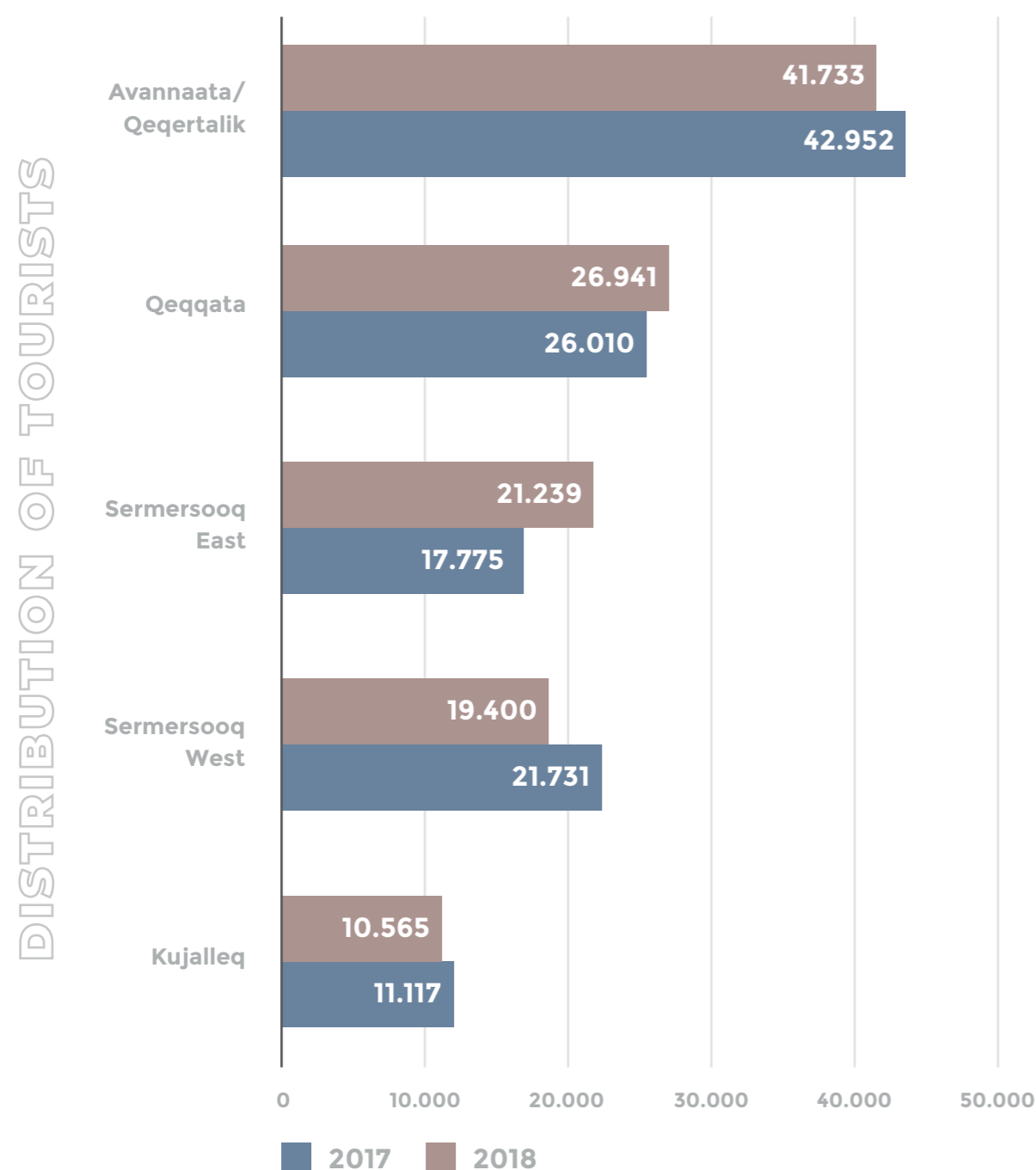
Visit Greenland sees particular potential in attracting tourists in the winter season via the branding campaign as well as in the MICE – Meetings, Incentives, Conferences and Events effort.

Main Initiatives Towards 2023

- We will work to make the winter season and winter products visible through newsletters, photo, video, press and agent visits in the shoulder season as well as through collaborations with tourism operators, destination management organisations (DMO) and airlines.
- In 2020 we will focus on meetings, incentives, conferences & events (MICE) and market Greenland as an attractive MICE-destination. Visit Greenland will prioritize the MICE segment with a special effort in relation to FAM-trips and will help local tourist operators in their MICE product development.
- We will gather new knowledge on winter products and innovative approaches that may help extend the season and will relay this to the industry.

#2 All year-round tourism in all of Greenland

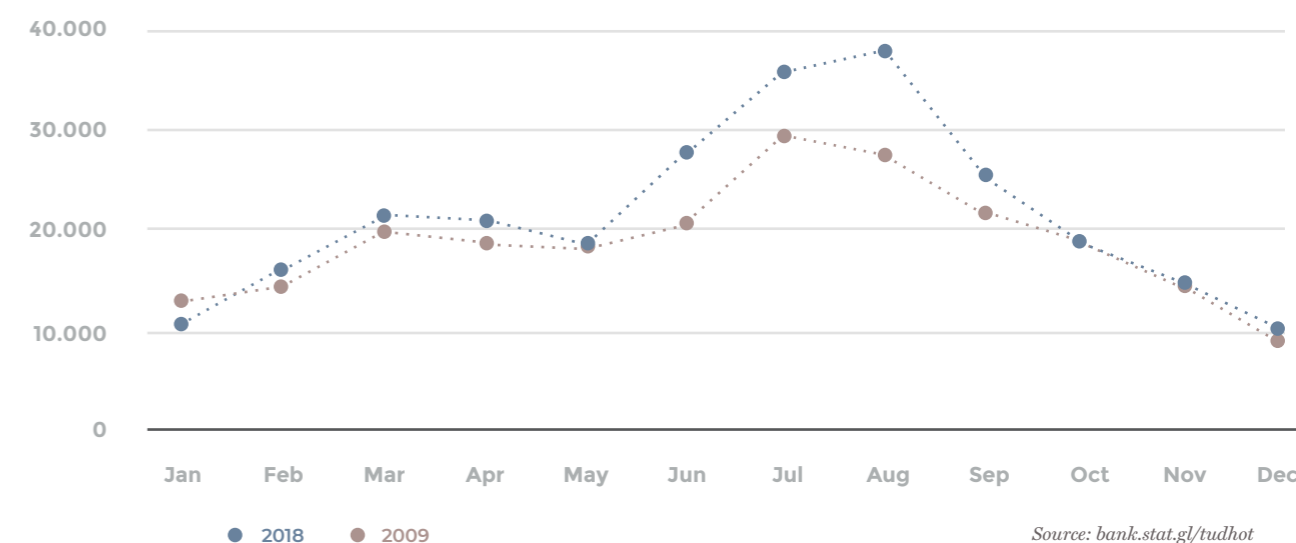
Number of international overnight stays in the 5 regions of Greenland 2017-2018



Note: The category Unknown (i.e. non-registered) is distributed proportionally between nationalities

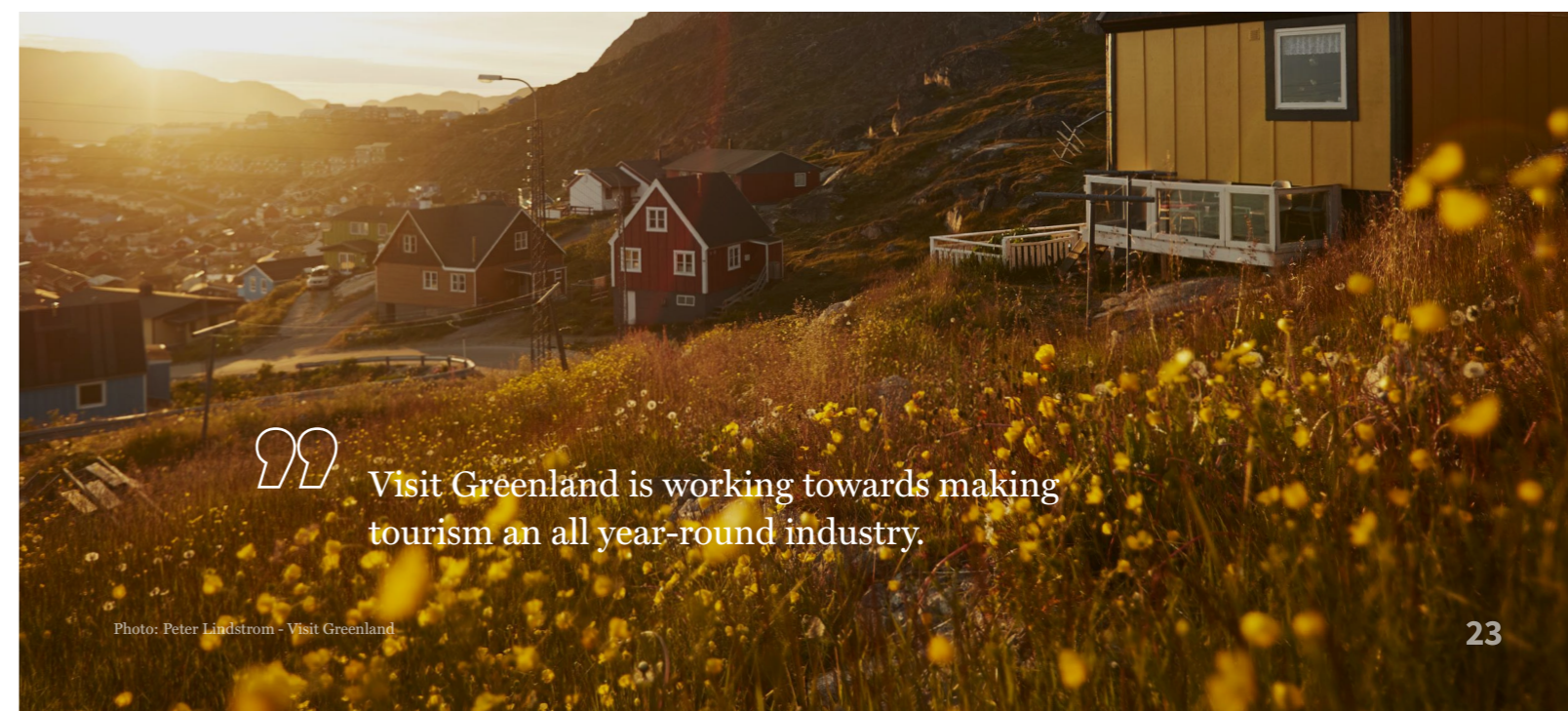
By a sustainable tourism industry we also mean tourism that is distributed more geographically in order to create a foundation for employment and revenue in the smaller settlements where there is a basis for tourism. Luckily there is a growing trend among adventure tourists to experience places that are not over-crowded by tourists and where one can experience authenticity and calm. By creating new products with these elements and marketing these products to the right segments (e.g. authenticity seekers and ethnophiles) one can in the long run achieve a more harmonious distribution of tourism in the country.

Number of overnight stays in accommodation in Greenland 2009-2018 by month



As the graph above shows, Greenland has for many years faced the challenge of attracting tourists in all of the 12 months of the year. In the last 10 years tourists have primarily visited the country from June-September, while demand has been very low during other months apart from a small secondary season in March-April – and in some years also May.

If the tourism industry in Greenland is to be economically sustainable, it is paramount that the tourism industry can make money and offer year-round jobs. This is only possible via targeted and broad collaboration within the industry to create demand from tourists in the current low seasons through coordinated marketing and product development that makes months out of the high season visible and attractive.



Visit Greenland is working towards making tourism an all year-round industry.

Photo: Peter Lindstrom - Visit Greenland

Knowledge sharing and competence upgrade



Visit Greenland participates in the project 'Digital Tourism in the Nordics'. The project aims to create a website containing best practice guides for online marketing via websites, social media and online media as well as guides on how to make one's products available for online booking and sale.

In November 2019 Visit Greenland carried out a survey on the competences of the tourism operators in the field of online marketing and sales and it shows that approximately half of the operators do not offer online booking/sale. In addition the survey shows that only approximately 15% actively use their company profile on tripadvisor.com. TripAdvisor is the world's most used portal for, among other things, reviews of travel experiences.

As the desire for more tourism in Greenland becomes more and more apparent it is clear that there is a need for a broad competence upgrade across the industry and to create optimum synergy in tourism coordination. It is both necessary to prepare the industry for future development and to know each other's roles and areas of responsibility.

That is why Visit Greenland is working to ensure a broad dialogue across sectors on identifying needs and clarifying responsibilities in collaboration with the most important players in tourism. This also applies to a closer dialogue with municipalities and regional tourism destinations (DMOs) as well as participating in workshops and seminars. The purpose is knowledge sharing and a coordinated effort based on an understanding that tourism is handled across different sectors and must be handled and developed on the basis of these areas of responsibility.

It is important to broaden the understanding of the value of tourism for the community and for tourists to feel welcome and received by the local community. In sustainable development there is room for both tourists and the local population.

Visit Greenland will work with the development of sustainable tourism in collaboration with DMOs and relevant stakeholders and will, in the strategy period, carry out attitude surveys that can shed light on whe-



re efforts should be directed.

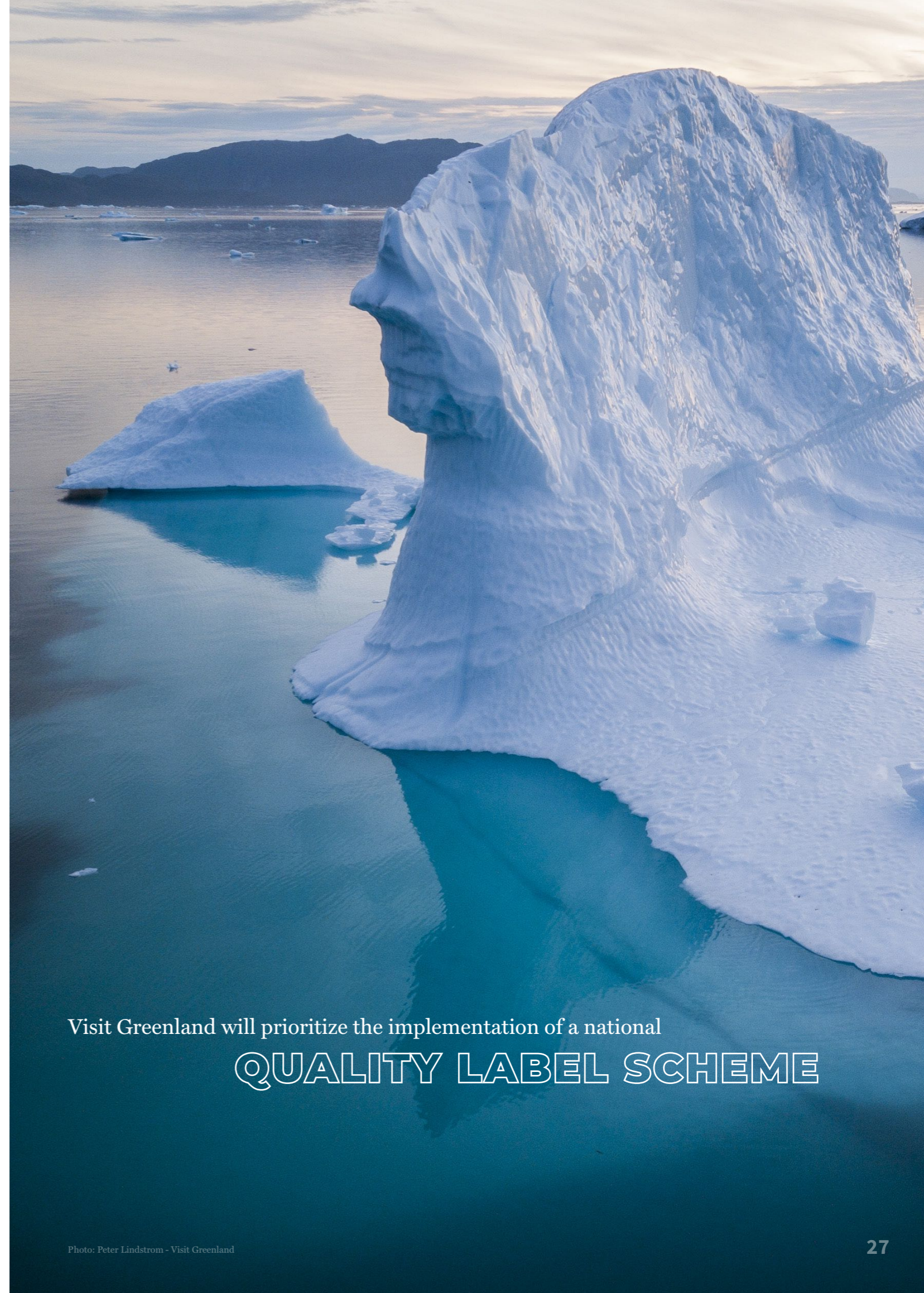
A challenge we face in our work with knowledge sharing and competence upgrade is digitalization. Technological development and digitalization is a somewhat overlooked area that is often taken for granted in everyday life, but this development is nonetheless one of the biggest driving forces in tourism. This is in part due to the fact that digitalization is first and foremost about people and the way we apply and seek information, and that is why digital development is linked to our use of travel experiences.

When we prioritize digitalization, it is because digitalization is part of the whole value chain from tourists seeking information when their interest is aroused, when they make purchases, during travel and subsequently when tourists share experiences with other potential travellers and their networks.

Our goal is, therefore, first and foremost, to catch up with the leading destinations technologically and in the area of service to meet the expectations that both present and future tourists have for Greenland. We can only achieve this goal through a clear division of responsibilities among primary tourism operators and a competence upgrade in the industry. This includes a boost of the digital competences in the industry, a close collaboration with educational institutions, better and more comprehensive analysis of market data and of digital collaboration platforms.

Main Initiatives Towards 2023

- ▶ We will develop the website www.visitgreenland.com that acts as the main platform for the marketing of Greenland, and is available in Danish, English and German.
- ▶ We will participate in the 3-year project 'Digital Tourism In the Nordics' with Iceland, Finland and the Faroe Islands to increase the digital competences for small and medium size tourist companies. Visit Greenland will use the project to provide tourism operators with startup help in the form of digital tools and the knowledge they need to get started.
- ▶ In 2020 we will establish regular dialogue meetings with DMOs about regional tourism development, including collaboration on press and FAM-trips (familiarisation for agents) as well as generally on visibility of the destinations including the World Heritage sites.
- ▶ In the strategy period we will focus our industry-oriented (B2B) effort through further development of traveltrade.visitgreenland.com. From this platform tools are developed for the industry and new knowledge is infused via newsletters and tourism analysis, among other things. The website is meant for both operators domestically and agents abroad. Knowledge sharing in the form of a new online dialogue forum will benefit the entire industry.
- ▶ We will carry out attitude surveys in the largest cities as well as the settlements that work with tourism. In addition, Visit Greenland will produce information material on the value of tourism for society and create an understanding of what Visit Greenland works with.
- ▶ Collaborate with Campus Kujalleq on the development of tourism programs as well as collaborating with universities domestically and abroad.



Visit Greenland will prioritize the implementation of a national

QUALITY LABEL SCHEME



Promote favorable framework conditions

It is the approach of Visit Greenland that framework conditions should continually be evaluated, and that unfavorable conditions must not paralyze the industry.

A number of framework conditions affect tourism development in Greenland, and it is the Government of Greenland that decides which framework conditions are to apply to tourism. Although Visit Greenland does not directly decide on framework conditions, we do play an active part as we are consulted in relation to amendments, as the initiator of putting selected framework conditions on the agenda and especially as a facilitator to create positive development under existing framework conditions.

Framework conditions with special consequences for tourism include: taxes, infrastructure, tourism concessions, food law, statistics, access to labour, education, dogsledding, fishing and hunting, private rental of housing, safety and control, support schemes, visa rules etc.

Knowing the economic imprint of tourism on the national economy, and through this creating comparability with other countries, is necessary in order to plan efforts that suit Greenland. That is why Visit Greenland supports the new tourism law on, among other things, Statistics Greenland. The aim is to know exactly what tourism means to our country and which framework conditions are necessary in order to create growth and sustainable development.

Since July 2014 Visit Greenland and Statistics Greenland have collaborated with Mittarfeqarfiit on registering the country of residence of flight passengers. It is the goal to register at least 95% of flight passengers. There is generally a need for data to become more valid and useful.

Main Initiatives Towards 2023

- ▶ We will work continuously with the Ministry of Industry, Energy & Research among others to improve statistics and documentation, including new ways of collecting data, especially on where tourists come from.
- ▶ In relation to accommodations we will collaborate with Statistics Greenland and try to get more accommodations included in the monthly registrations of the number of overnight stays per nationality as well as the number of guests.
- ▶ We will continue to analyse markets, trends and tendencies in international tourism with the purpose of using this knowledge to market Greenland as well as possible and bring valuable knowledge to the industry.
- ▶ We will publish an annual tourism report on tourismstat.gl.
- ▶ We will work towards an increased dialogue with all stakeholders in the effort to identify and influence better framework conditions for tourism, as this is a crucial step in the sustainable development of the industry.
- ▶ We will work to increase understanding of what tourism concessions can mean to the development of destinations and regions.



Visit Greenland will work towards an increased dialogue with all stakeholders in our effort to identify and influence better framework conditions for tourism as this is crucial for the sustainable development of the industry.



VISIT GREENLAND'S TASKS

visitgreenland.com	Tradeshows participation	Focus on winter in marketing	Regional visits	Hearings	Identifying needs	Publishing tourism reports
Social Media	Match of agents and tourism operators		Conferences workshops			
traveltrade.visitgreenland.com	Agent training	Promote Dark Sky Tourism	Knowledge sharing	Identifying needs	Consultancy on digitalization	Improve basis and validity of statistics
Campaigns	B2B work	FAM trips and press trips during the winter season	Projects			Efforts with the Ministry of Industry, Energy & Research and Statistics Greenland
Newsletters	Press and agent visits		Label scheme quality, safety and environment	Promote favorable framework conditions	Project collaboration and knowledge sharing	
Content Production	traveltrade.visitgreenland.com	Collaboration with airlines and tourism operators	Dialogue with DMOs			Market Analysis
			Dialogue with tourism operators			
			traveltrade.visitgreenland.com			

VISIBILITY

INTERNATIONAL MARKET DEVELOPMENT

SEASON EXPANSION

NATIONAL MARKET DEVELOPMENT

FRAMEWORK CONDITIONS

DIGITALIZATION

STATISTICS AND DOCUMENTATION



For Visit Greenland our goal of digitalization is first and foremost concerned with catching up with the leading destinations technologically and service-wise which incidentally is also what current and future tourists expect of a destination such as Greenland.

3 SIGNS OF SUCCESS IN 2023

#1

The number of international overnight stays will have increased by 5% annually in the period from 2019-2023.

#2

The overall satisfaction of tourists with their visit and experiences in Greenland will as a minimum be on the same level as in 2015 and 2017 which was 4.7 out of 5.

#3

At least 80% of the population in Greenland sees tourism as something that contributes positively to Greenlandic society.



WE LOOK FORWARD TO A DIALOGUE ABOUT TOURISM DEVELOPMENT

