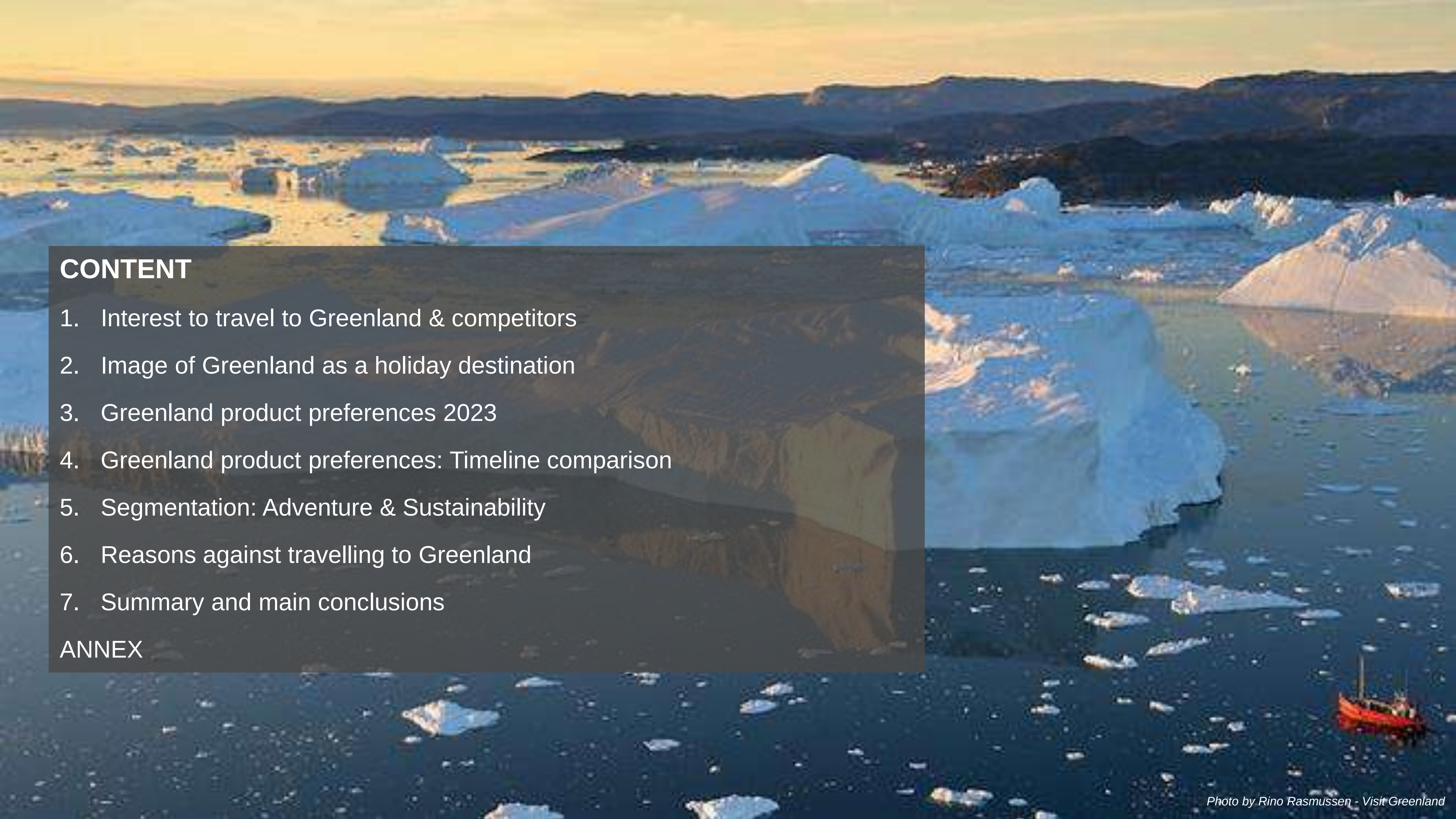
Positioning and potentials of Greenland on its main GLOBAL markets

Report on the results of the surveys in DE, FR, UK, DK, SE, NO, US, CA

April 2023
Ulf Sonntag, NIT

Introduction and background of this study

- Visit Greenland has commissioned the Institute for Tourism Research in Northern Europe (NIT) to conduct a market research studies on the “Positioning and potential of Greenland” in eight European and North American countries (DE, FR, UK, DK, SE, NO, US, CA).
- The central aim is to get a thorough and complete picture on the volume, the structure, the attitudes and images of the market potential of Greenland in these markets, in order to provide a sound basis for the future strategic planning of Greenland concerning its marketing efforts, product development and communication.
- The studies followed the same methodological approach as previous studies 2016 in Germany, Great Britain and USA, 2017 in France and in 2018 in Scandinavia. Timeline analyses based on the new 2023 studies with the “old” studies of 2016/2017/2018 are possible.
- The following reports are being published in the context of this multi-market study:
  - One report on the German market
  - One report on the French market
  - One report on the UK market
  - One report on the Scandinavian market
  - One report on the North American market
  - One comparative report covering the baseline information of all the five markets.
- **This document is the COMPARATIVE REPORT covering the baseline information of all the five markets**.
- The results are based on 18,500 online interviews that were conducted in the eight countries in January 2023 by our partner Dynata. The results are representative for the population aged 18-75 years in the European markets and for passport holders aged 18-75 years in North America.



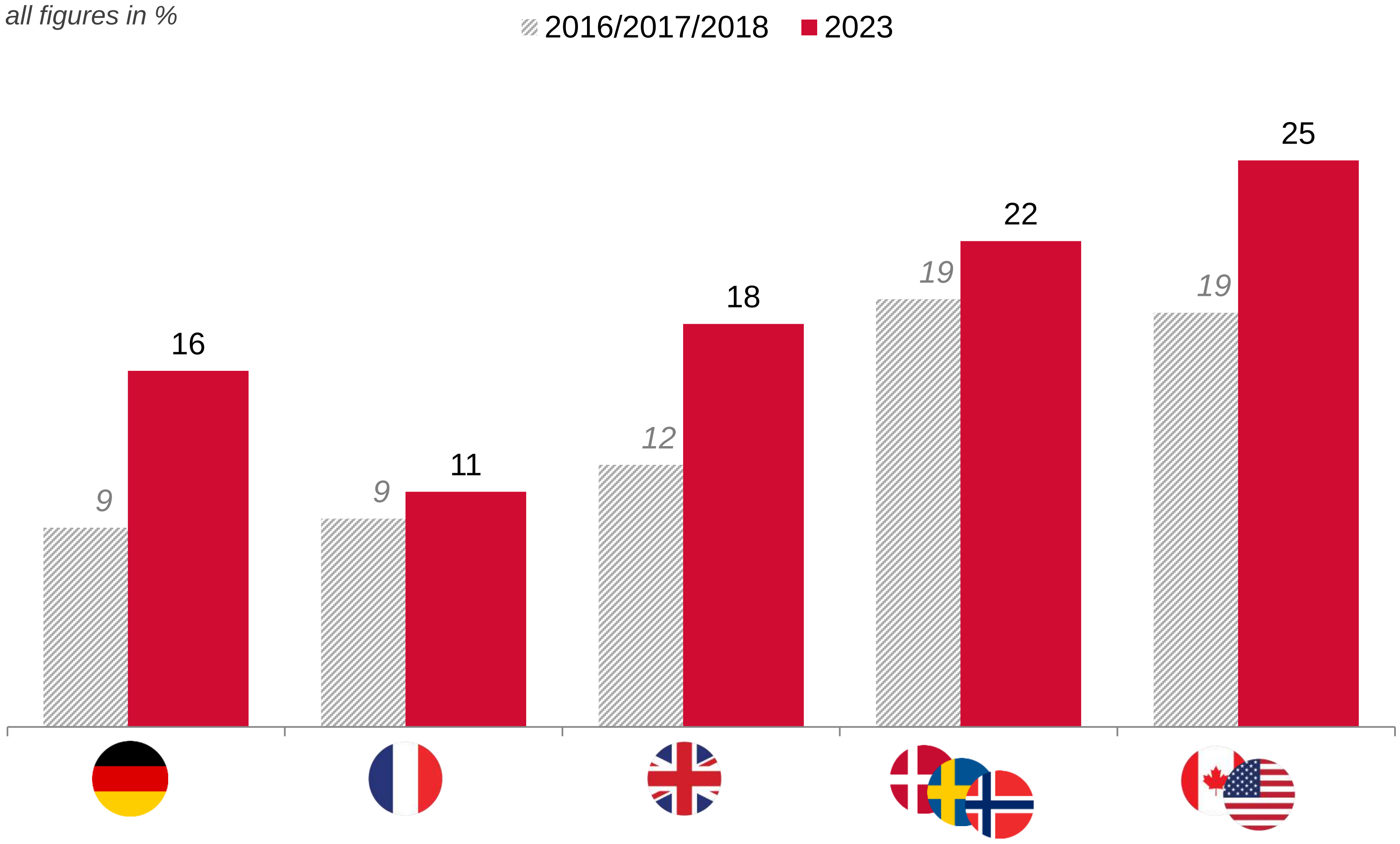
CONTENT

Photo by Rino Rasmussen - Visit Greenland

1. Interest to travel to Greenland & competitors

Photo by Mads Pihl - Visit Greenland

General interest to travel to Greenland



» To identify the “general” potential of Greenland and competitive remote destinations in a very soft and broad way, we asked “*Which of these destinations would you like to visit within the next 5 years?”*

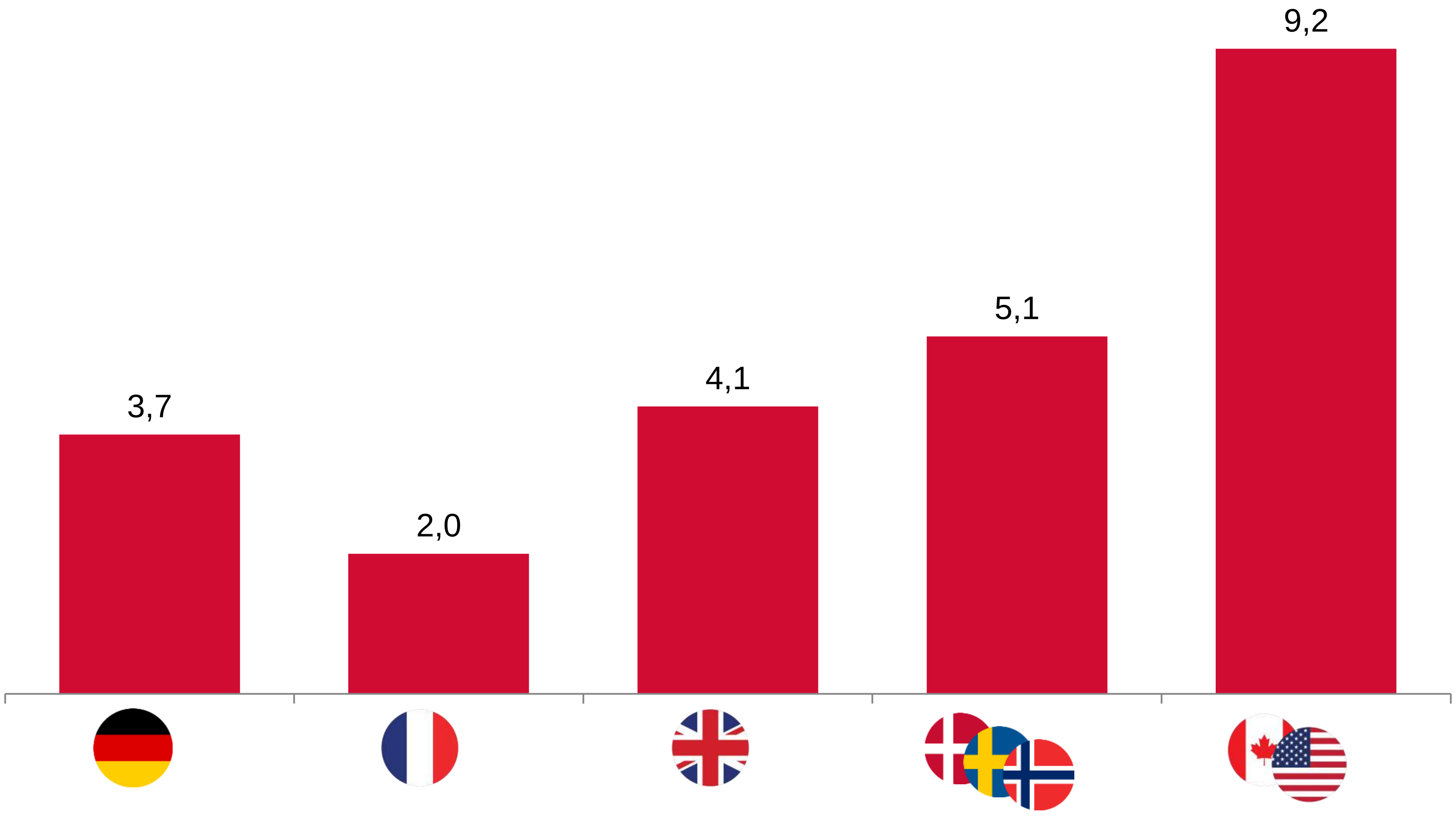
» For Greenland we see quite a spread between the different markets: 11% of all respondents in France would like to visit Greenland in the next 5 years, 16% in Germany, 18% in the UK, 22% in Scandinavia and 25% in North America.

» Compared with the previous studies, we see increases in all markets. The biggest increases can be found in the markets where the previous studies have been the longest ago (DE, UK, US: 2016). *Note: In these markets the set of competitors has been somewhat different from the later studies. This might have an affect on the data.*

Now we are talking about remote travel destinations. Which of these destinations would you like to visit within the next 5 years?
Basis: All respondents (details in annex, line A)
Source: Visit Greenland market studies 2023 by NIT

“Hard potential“ to travel to Greenland

all figures in %



- To identify the “hard” potential of Greenland and competitive remote destinations, we asked “*Which of these travel destinations are you almost definitely planning to visit within the next 2 years?”*
- Here the figures are obviously much lower than in the previous question regarding generally wanting to travel there in the next 5 years.
- Again, we see big differences for Greenland between the markets: 2.0% in France, 3.7% in Germany, 4.1% in UK, 5.1% in Scandinavia and 9.2% in North America.

Now we are talking about remote travel destinations. Which of these travel destinations are you almost definitely planning to visit within the next 2 years?
Basis: All respondents (details in annex, line A)
Source: Visit Greenland market studies 2023 by NIT

General interest to travel to remote destinations

1	Iceland	Canada	Canada	Iceland	Canada
2	Canada	Iceland	New Zealand	New Zealand	New Zealand
3	New Zealand	New Zealand	Iceland	Canada	Iceland
4	N. Scandinavia	Patagonia	N. Scandinavia	N. Scandinavia	Alaska
5	Greenland	N. Scandinavia	Alaska	Faroe Islands	Greenland
6	Faroe Islands	Alaska	Greenland	Greenland	N. Scandinavia
7	Alaska	Faroe Islands	Faroe Islands	Svalbard Islands	Patagonia
8	Svalbard Islands	Greenland	Antarctica	Alaska	Antarctica
9	Patagonia	Antarctica	Patagonia	Patagonia	Faroe Islands
10	Antarctica	Svalbard Islands	Svalbard Islands	Antarctica	Svalbard Islands

- This slide shows the competitive set of remote destinations that was asked in all the markets.
- Regarding the interest to travel there in the next 5 years, Greenland is ranking 5 in Germany and North America, 6 in UK and Scandinavia and 8 in France.
- In all markets, Canada, Iceland and New Zealand (in different orders) are the Top-3 remote destinations, with much higher interest figures than Greenland.

Now we are talking about remote travel destinations. Which of these destinations would you like to visit within the next 5 years?
Basis: All respondents (details in annex, line A)
Source: Visit Greenland market studies 2023 by NIT

Volume extrapolations of potential travellers to Greenland

FUNNEL	Definition					
total	Population 18-75 in Europe; Passport holders 18-75 in North America	60.6 million	47.3 million	47.5 million	15.4 million	116.5 million
total potential	"like to travel to Greenland within the next 5 years"	9.6 million	5.0 million	8.6 million	3.4 million	29.5 million
'hard' potential	"almost definitely planning to visit Greenland within the next 2 years"	2.3 million	0.9 million	1.9 million	0.8 million	10.8 million
visitors	Plane and cruise passengers to Greenland in 2019	18,405 plane: 4,747 cruise: 13,658	4,938 plane: 2,927 cruise: 2,011	5,668 plane: 1,743 cruise: 3,925	32,238 plane: 31,137 cruise: 1,101	21,961 plane: 5,737 cruise: 16,224

- The volume funnel puts the reported market shares in relation to the actual market size and delivers concrete volume figures.
- It shows first of all the different market sizes, based on population in European markets and on passport holders in North America (based on the philosophy only to ask persons who actually could travel to Greenland)
- Looking at the total and the "hard" potential, we see that North America is the biggest market by volume, followed by Germany and UK on a similar level, and France and Scandinavia.
- The actual visitor arrival figures put into perspective how few of the potential visitors you need to motivate in the end to achieve a good turnout for the Greenlandic tourism sector.

Source: Visit Greenland market studies 2023 by NIT

To learn 1:
Interest to travel to Greenland & competitors

Potential travellers to Greenland

- Looking at the “total” potential for Greenland in the five markets, there are 11% of all respondents in France would like to visit Greenland in the next 5 years, 16% in Germany, 18% in the UK, 22% in Scandinavia and 25% in North America.
- Compared with the previous studies, we see increases in all markets. The biggest increases can be found in the markets where the previous studies have been the longest ago (DE, UK, US: 2016).
- Regarding the “hard” potential who are you almost definitely planning to visit Greenland within the next 2 years, the figures are obviously much lower for the total potential. Again, we see big differences for Greenland between the markets: 2.0% in France, 3.7% in Germany, 4.1% in UK, 5.1% in Scandinavia and 9.2% in North America.
- In the context of the whole set of competitors (interest to travel there in the next 5 years), Greenland is ranking 5 in Germany and North America, 6 in UK and Scandinavia and 8 in France.
- In all markets, Canada, Iceland and New Zealand (in different orders) are the Top-3 remote destinations, with much higher interest figures than Greenland.

Volume funnel:

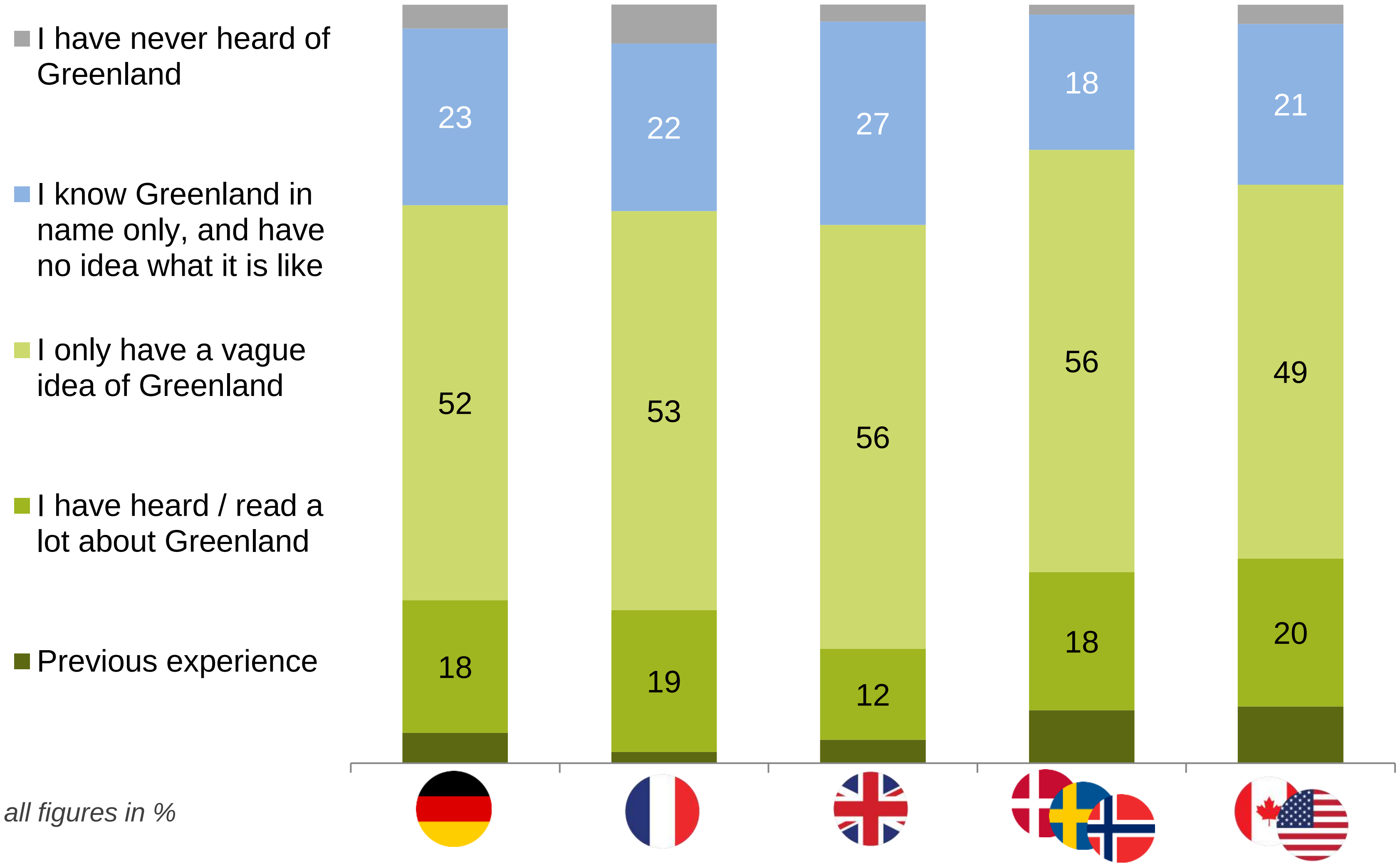
- The volume funnel puts the reported market shares in relation to the actual market size and delivers concrete volume figures.
- It shows first that the different markets are very different in their sizes, based on its population in European markets and on passport holders in North America (based on the philosophy only to ask persons who actually could travel to Greenland)
- Looking at the “total” and the “hard” potential, we see that North America is the biggest market by volume, followed by Germany and UK on a similar level, and France and Scandinavia.
- The actual visitor arrival figures put into perspective how few of the potential visitors you need to motivate in the end to achieve a good turnout for the Greenlandic tourism sector.

- Compared with the actual tourism arrivals in Greenland, there is a huge interest to travel to Greenland in all the markets, and the interest is growing.
- This is where destination marketing comes in. The following parts of the report should help with strategic marketing decisions.

2. Image of Greenland as a holiday destination

Photo by Mads Pihl - Visit Greenland

How well do the markets know Greenland?



all figures in %

- When asking in the different markets how well Greenland is known, we can see that there is hardly anybody who knows Greenland by previous own experience and also almost nobody who has never heard of Greenland at all.
- The biggest group in all markets, between 49% (North America) and 56% (UK/Scandinavia) of the population have only a vague idea of Greenland.
- Between 12% (UK) and 20% (North America) know Greenland quite well and have heard/read a lot about Greenland.
- The remaining 19% (Scandinavia) to 29% (UK) only know Greenland by name or have no idea what it is like.
- This means Greenland is generally on the radar of a majority of the people in each market, but there are only quite few who have a good knowledge about what Greenland is really like.

How well do you know Greenland as a travel destination?
Basis: All respondents (details in annex, line A)
Source: Visit Greenland market studies 2023 by NIT

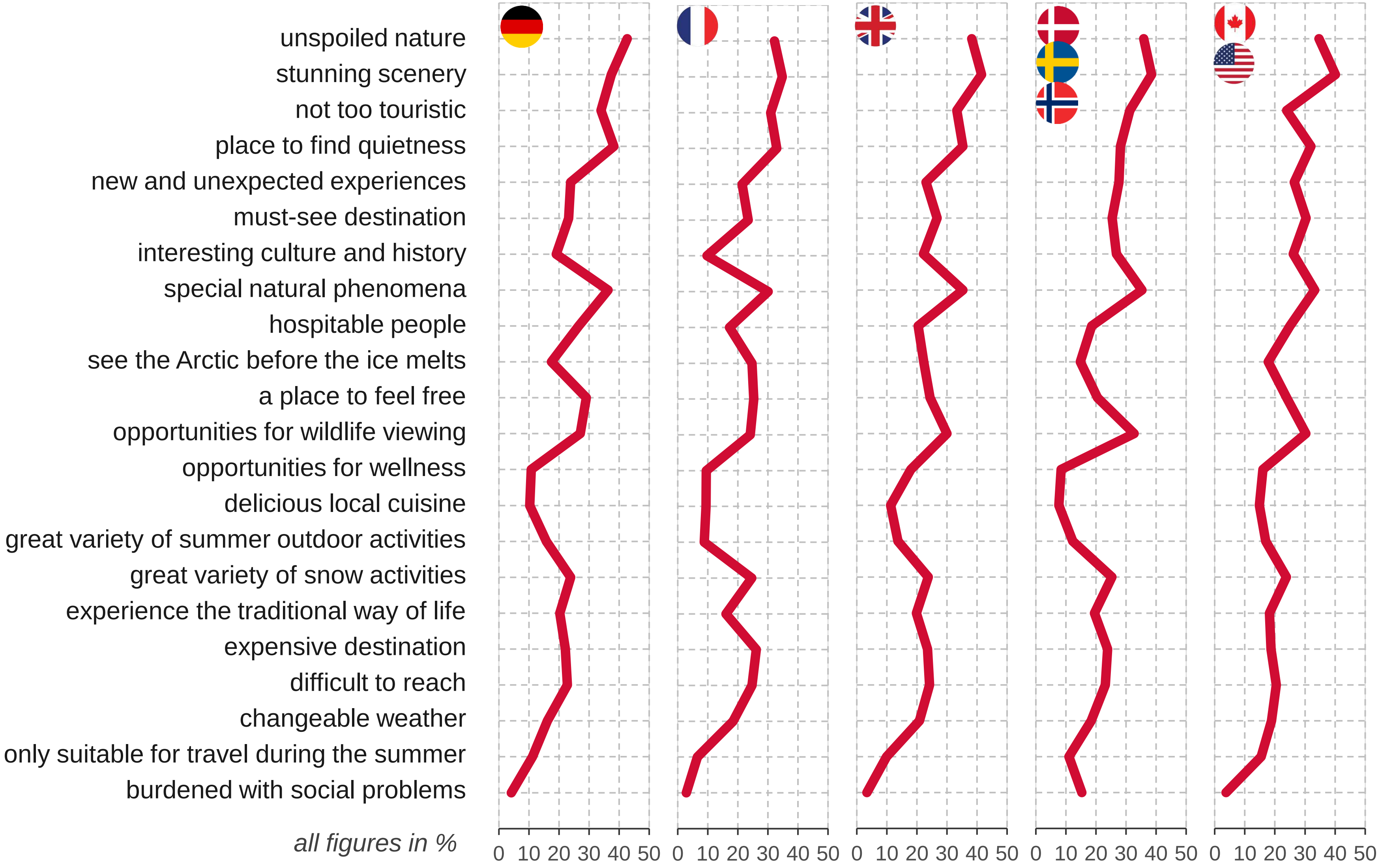
Image of Greenland in the population of the different markets: TOP 10 image items

					
1	unspoiled nature	stunning scenery	stunning scenery	stunning scenery	stunning scenery
2	place to find quietness	place to find quietness	unspoiled nature	unspoiled nature	unspoiled nature
3	stunning scenery	unspoiled nature	place to find quietness	special natural phenomena	special natural phenomena
4	special natural phenomena	not too touristic	special natural phenomena	opportunities for wildlife viewing	place to find quietness
5	not too touristic	special natural phenomena	not too touristic	not too touristic	must-see destination
6	a place to feel free	expensive destination	opportunities for wildlife viewing	place to find quietness	opportunities for wildlife viewing
7	opportunities for wildlife viewing	a place to feel free	must-see destination	new and unexpected experiences	new and unexpected experiences
8	hospitable people	difficult to reach	a place to feel free	interesting culture and history	interesting culture and history
9	new and unexpected experiences	see the Arctic before the ice melts	difficult to reach	must-see destination	hospitable people
10	great variety of snow activities	great variety of snow activities	great variety of snow activities	great variety of snow activities	not too touristic

- When asked for the image of Greenland as a travel destination, almost all the markets firstly see stunning scenery and unspoiled nature.
- In many markets soft and maybe somewhat unexpected characteristics like “a place to find quietness” and “not too touristic” can be found very high up in the ranking.
- Natural phenomena and wildlife viewing are also important in most markets, followed by quite individual characteristics in the lower ranks.
- This already shows some strengths of the Greenlandic tourism product, but at the same time its fragility and the need to manage growth carefully to not endanger the biggest tourism assets.
- Interestingly France is the only market where you also find negative characteristics in the Top-10.

Please tell me which of these characteristics do you think particularly apply to Greenland?
Basis: All respondents (details in annex, line A)
Source: Visit Greenland market studies 2023 by NIT

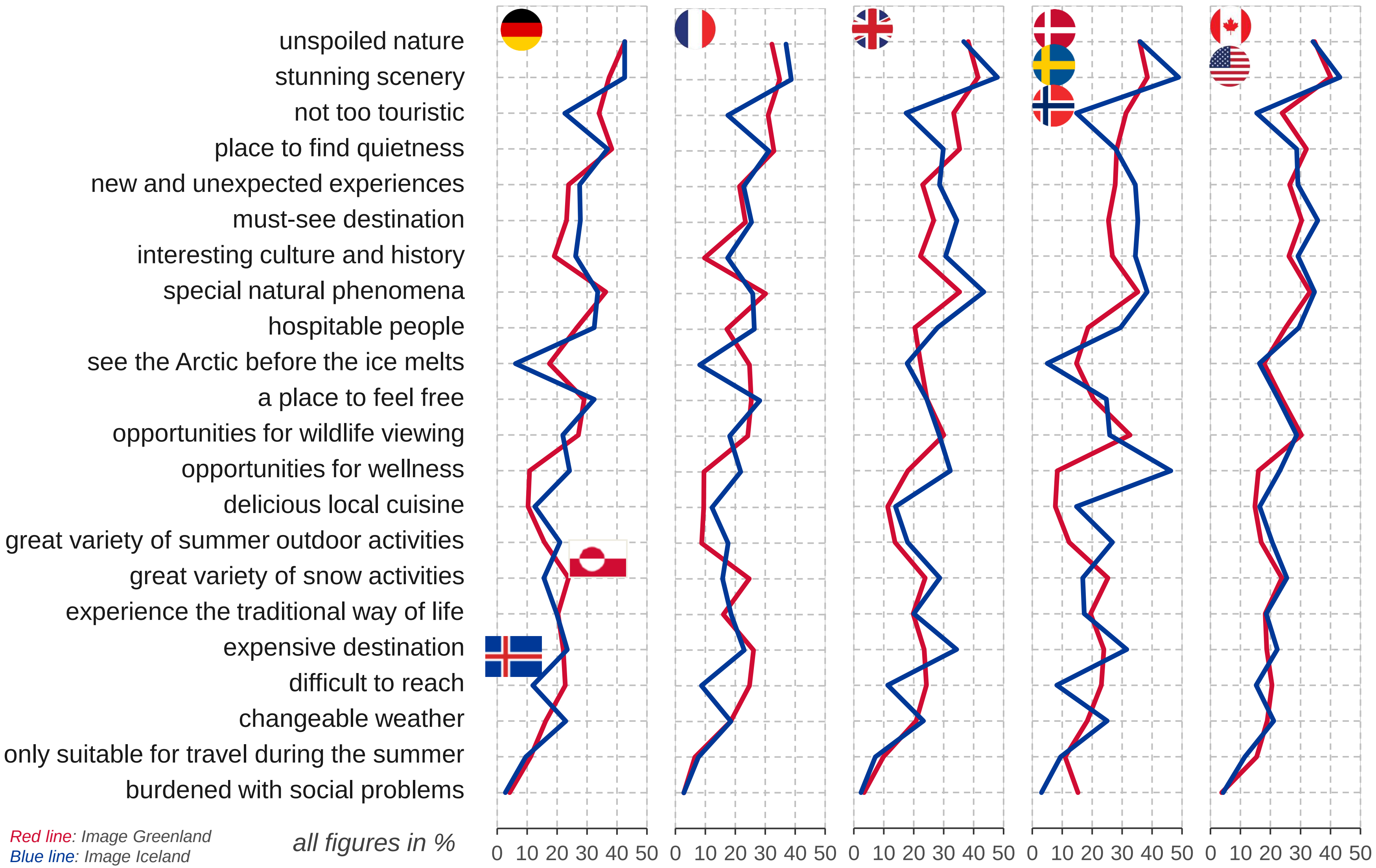
Image of Greenland in the population of the different markets



- With this sparkline graphics it is possible to see all the image characteristics of Greenland as a travel destination in all markets at one glance.
- It shows that the image profiles of the different markets are quite similar, so the image of Greenland in the markets is to a certain degree alike.
- On the other hand, you can also see the differences, e.g. the peaks for wildlife watching and natural phaenomena in Scandinavia, the peak for stunning scenery in North America, the high importance of unspoiled nature and a place to find quietness in Germany, and the negative peak for culture and history in France, together with quite high figures for negative aspects, as expensive destination and difficult to reach.
- Both, similarities and differences are interesting inputs to be considered in marketing strategies for these markets.

Please tell me which of these characteristics do you think particularly apply to Greenland?
Basis: All respondents (details in annex, line A)
Source: Visit Greenland market studies 2023 by NIT

Image of Greenland compared with image of Iceland in the population of the different markets



- As we have asked the same image question also regarding Iceland as a travel destination, we can benchmark both destinations and find out about image similarities and differences in the consumers eyes.
- First of all, we see that in all markets the image profiles of both destinations are somewhat similar: In fact in North America, they are almost identical, whereas in the European markets you can identify similarities but also some striking differences.
- In all markets the “not too touristic” is rated higher for Greenland than for Iceland, the same is true for “difficult to reach”.
- In Germany, France and Scandinavia, Greenland also ranks higher regarding “see the Arctic before the ice melts” and snow activities.
- For many other characteristics the figures for Iceland are higher than for Greenland.

Please tell me which of these characteristics do you think particularly apply to Greenland/Iceland?
Basis: All respondents (details in annex, line A)
Source: Visit Greenland market studies 2023 by NIT

To learn 2:
Image of Greenland as a holiday destination

- There is hardly anybody who knows Greenland by previous own experience and also almost nobody who has never heard of Greenland at all.
- The biggest group in all markets, between 49% and 56% of the population have only a vague idea of Greenland. Between 12% and 20% know Greenland quite well and have heard/read a lot about Greenland. The remaining 19% to 29% only know Greenland by name or have no idea what it is like.
- This means Greenland is generally on the radar of a majority of the people in each market, but there are only quite few who have a good knowledge about what Greenland is really like.
- When asked for the image of Greenland as a travel destination, almost all the markets firstly see stunning scenery and unspoiled nature. In many markets soft and maybe somewhat unexpected characteristics like “a place to find quietness” and “not too touristic” can be found very high up in the ranking. Natural phenomena and wildlife viewing are also important in most markets, followed by quite individual characteristics in the lower ranks.
- Generally, the image profiles of the different markets are quite similar, so the image of Greenland in the markets is to a certain degree alike. On the other hand, you can also see the differences, e.g. the peaks for wildlife watching and natural phaenomena in Scandinavia, the peak for stunning scenery in North America, the high importance of unspoiled nature and a place to find quietness in Germany, and the negative peak for culture and history in France, together with quite high figures for negative aspects, as expensive destination and difficult to reach.
- When benchmarking Greenland and Iceland regarding their image as holiday destinations, we see that in all markets the image profiles of both destinations are somewhat similar: In fact in North America, they are almost identical, whereas in the European markets you can identify similarities but also some striking differences: In all markets the “not too touristic” is rated higher for Greenland than for Iceland, the same is true for “difficult to reach”. In Germany, France and Scandinavia, Greenland also ranks higher regarding “see the Arctic before the ice melts” and snow activities. For many other characteristics the figures for Iceland are higher than for Greenland.

- The results about the image of Greenland give you a clear picture of how Greenland is perceived as a holiday destination in the five markets.
- The analysis of the image profiles of the five markets show that despite their similarities, each market seems to have its own characteristic view on Greenland
- Both, similarities and differences are interesting inputs to be considered in marketing strategies for these markets.
- The results already show some strengths of the Greenlandic tourism product, but at the same time its fragility and the need to manage growth carefully to not endanger the biggest tourism assets.

3. Greenland product preferences 2023

Photo by Mads Pihl - Visit Greenland

Potential travellers to Greenland: Preferred holiday experiences in Greenland

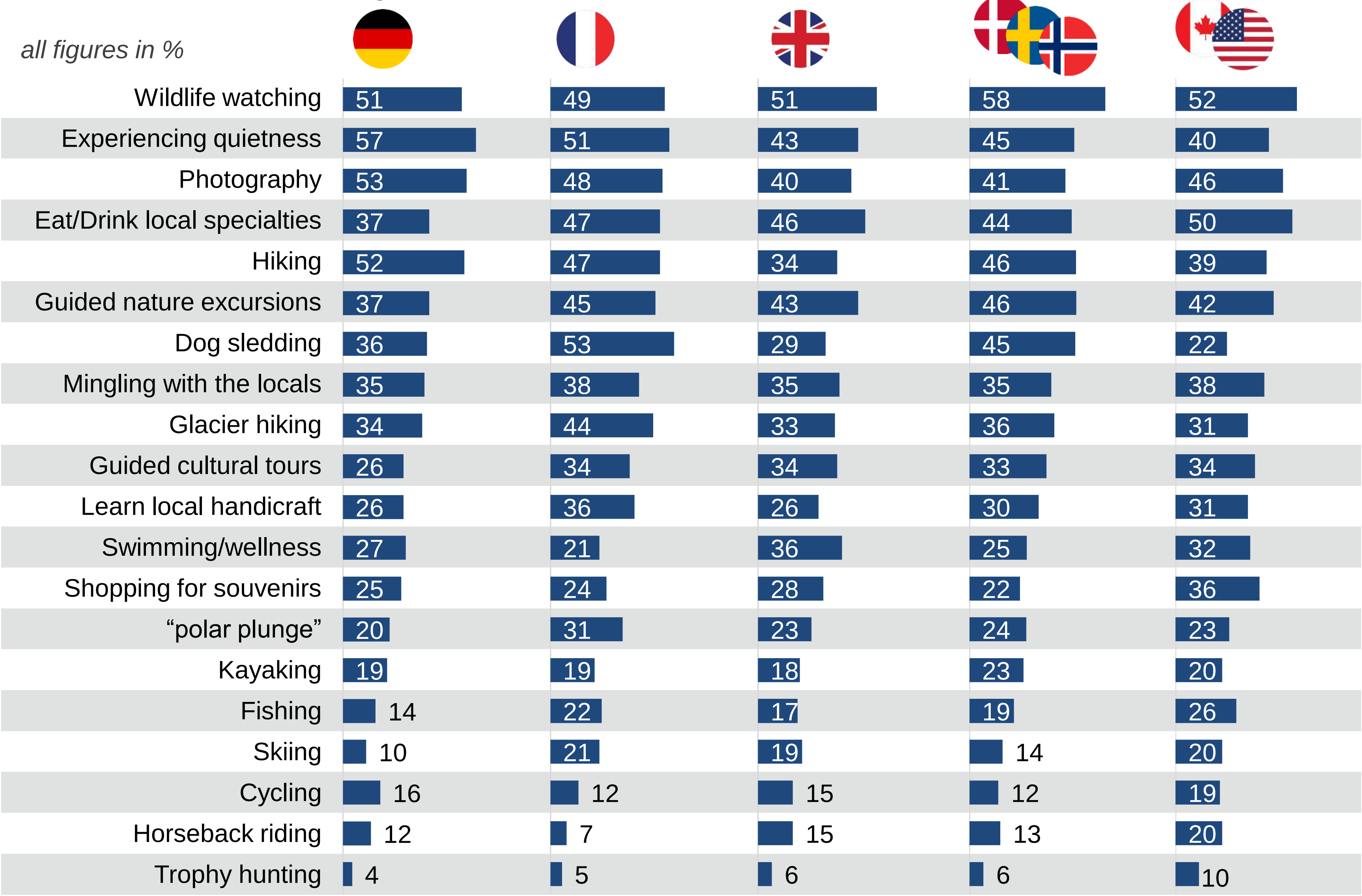
all figures in %

Stunning scenery (e.g. mountains, fjords, cliffs)	62	63	64	67	63
Natural phenomena (e.g. Northern Lights, Midnight Sun)	61	61	57	62	56
Wildlife (e.g. whales, birds, musk ox, reindeer)	54	53	56	66	55
Glaciers/Icebergs	55	69	56	54	48
Traditional villages	40	53	47	47	49
New and unexpected experiences	38	44	43	49	48
Historic sights/events	31	34	42	38	46
Volcanoes/Hot springs/Geysers	42	36	42	31	33
Contemporary culture/lifestyle	28	34	35	23	38
Capitals/Cities	29	34	25	25	29

- This chapter is capturing the desires of potential travellers (general, next 5 years) regarding future trips to Greenland.
- Again, similar as with the image questions, the ranking of desired experiences in Greenland is quite similar between the markets but with some characteristic differences.
- Stunning scenery, natural phaenomena, wildlife and glaciers/icebergs are very important in all the markets.
- Somewhat striking are the high figures for glaciers/icebergs in France and for wildlife in Scandinavia.
- Generally, nature-focussed experiences dominate over culture-focussed experiences.
- The quite high figures for volcanoes etc. in some markets may be a sign that the potential travellers do not know too well what can be expected in Greenland.

When thinking about travelling to Greenland what would you like to see/experience?
Basis: Potential Greenland travellers (details in annex, line B)
Source: Visit Greenland market studies 2023 by NIT

Potential travellers to Greenland: Preferred holiday activities in Greenland



- With this question we are covering more concretely the activities that potential travellers would like to do when travelling to Greenland.
- While still seeing similarities between the markets, there are now some striking differences even in the Top-3 of the market's rankings:
- In Germany the Top-3 activities are experiencing quietness, photography and hiking.
- In France it is dog-sledding, experiencing quietness and wildlife.
- In the UK, Scandinavia and North America wildlife is top, followed by culinary and nature excursions (UK), hiking and nature excursions (Scan.) and culinary and photography (NA).
- But also the full ranking is worth a closer look, showing quite characteristic mixes of nature-focussed, culture-focussed and exercise-focussed activities in each market.

Which of the following activities would you like to do when travelling to Greenland?
Basis: Potential Greenland travellers (details in annex, line B)
Source: Visit Greenland market studies 2023 by NIT

Potential travellers to Greenland: Preferences about getting to Greenland

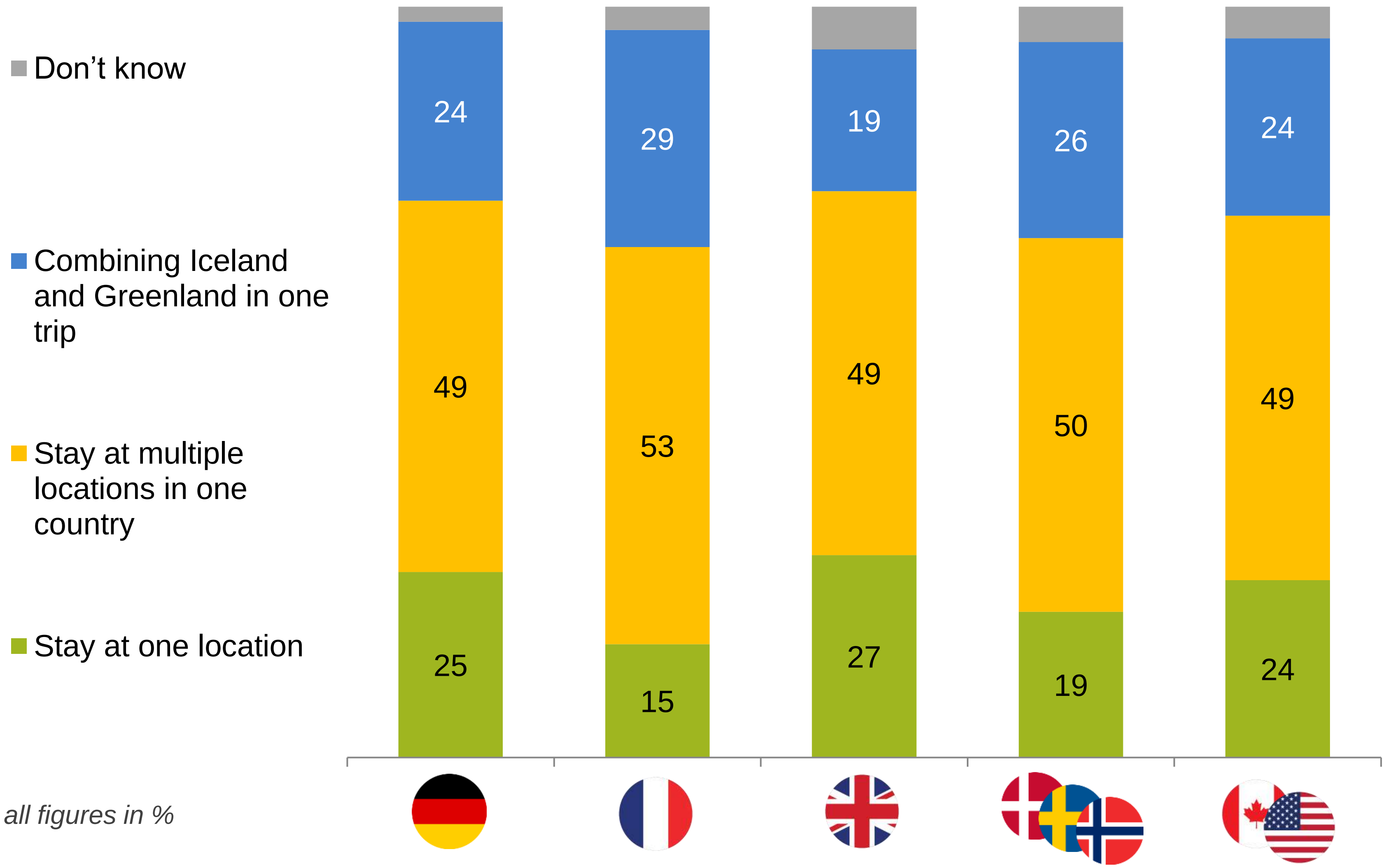
all figures in %

	Germany	France	UK	Scandinavia	North America
Plane: Direct flight to the destination	67	65	71	79	70
Plane: Round trip in multiple countries	18	29	23	20	34
Plane: Stopover between Europe and North America	13	14	16	16	22
PLANE TOTAL	79	84	87	90	91
Cruise: Start/End in Europe	28	27	27	24	19
Cruise: Start/End in North America	8	7	9	13	25
Cruise: Start/End in Greenland/Iceland	13	13	13	19	18
Cruise: Transatlantic	7	9	5	9	10
CRUISE TOTAL	40	39	37	37	45

- When asking potential travellers to Greenland how they would like to travel there, arriving by plane dominates , with total figures between 91% in North America and 79% in Germany.
- Looking more into detail, most potential travellers prefer a direct (not “non-stop”) flight to Greenland (between 79% and 65%), some want to combine Greenland with other countries (between 18% and 34%) and few can imagine Greenland as a place for a stop-over between Europe and North America (between 22% and 13%)
- Next to plane travel, arriving by cruise ship to Greenland is also an option for many potential travellers, concretely between 45% in North America and 37% in UK and Scandinavia.
- Here, Americans prefer to start/end in North America and Europeans to start/end in Europe. Some are also open to start/end in Iceland/Greenland and/or Transatlantic.

How would you like to travel to Greenland?
Basis: Potential Greenland travellers (details in annex, line B)
Source: Visit Greenland market studies 2023 by NIT

Potential plane travellers to Greenland: What kind of stay in Greenland?

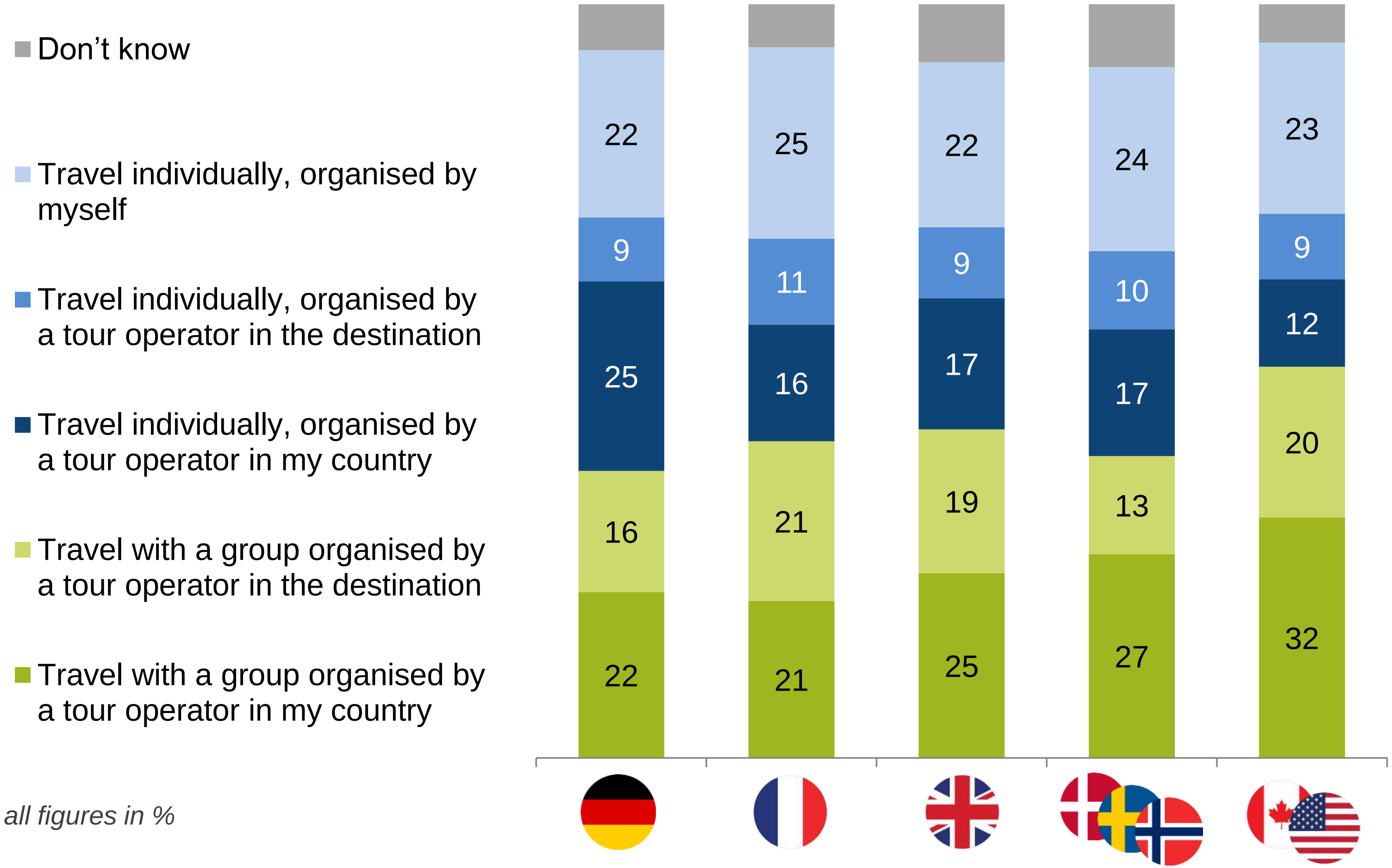


all figures in %

- Potential plane travellers to Greenland who would like to arrive either with a direct flight or during a stopover were asked what kind of stay in Greenland they would prefer.
- In all markets, the biggest segment is stating that they would like to stay in multiple locations in Greenland, figures ranging between 49% and 53%.
- The second biggest segment likes to combine Greenland and Iceland in one trip, with figures between 19% and 29%.
- We find similar figures, between 15% and 27% in the third segments, wanting to stay at one location while in Greenland.

How would you like to experience your stay in Greenland?
Basis: Potential plane travellers with a direct or stopover flight (details in annex, line C)
Source: Visit Greenland market studies 2023 by NIT

Potential plane travellers to Greenland: How to organize your trip to Greenland?

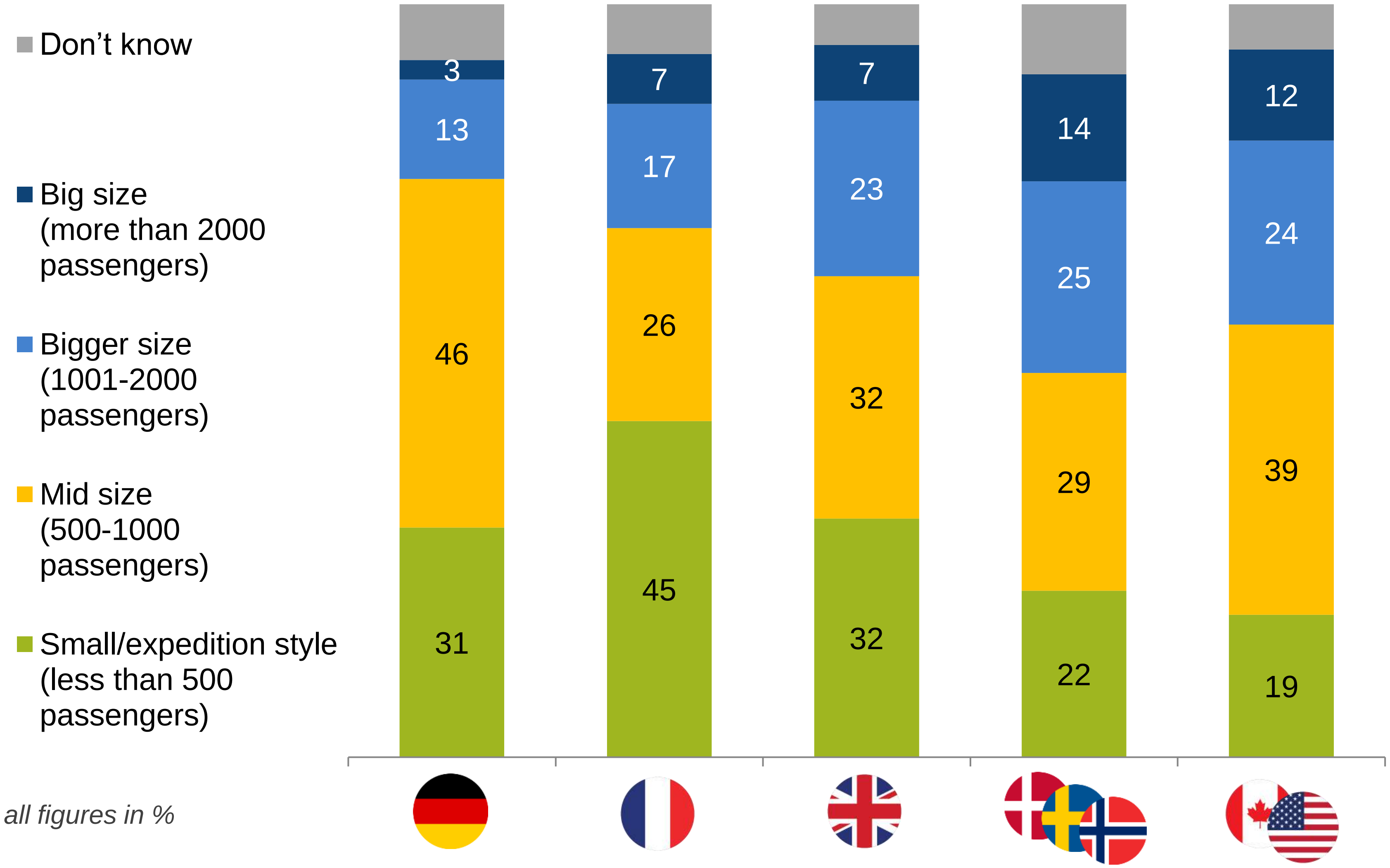


all figures in %

- Potential plane travellers to Greenland were asked how they would like to organize a trip to Greenland.
- In all markets, the potential travellers are divided in two segments, one preferring travelling in a group, the other travelling individually.
- In North America, the group travel segment is slightly bigger than the individual one, in Europe it is the opposite.
- Generally, in both segments, there is a bigger preference to book with a tour operator in ones’ own country rather than booking with a tour operator in the destination.
- Within the individual segment, quite a large share wants to organize the trip individually without any help of a tour operator.
- These results generally show the importance of tour operators and hence the need for b2b-marketing.

How would you like to organize your trip to Greenland?
Basis: Potential plane travellers to Greenland (details in annex, line D)
Source: Visit Greenland market studies 2023 by NIT

Potential cruise travellers to Greenland: What size of ship to travel to Greenland?



all figures in %

- Potential travellers to Greenland who stated that they would like to travel there by cruise ship were asked what size of cruise ship they would prefer for a cruise to Greenland.
- While the results in the different markets differ quite a lot, we find in all markets a majority preferring smaller ships with 1,000 passengers or less.
- Concretely, the figure for ships up to 500 passengers is between 45% in France and 19% in North America.
- The figure for ships between 500 and 1,000 passengers is between 46% in Germany and 26% in France.
- The figure for ships between 1,000 and 2,000 passengers is between 25% in Scandinavia and 13% in Germany.
- Hardly anybody fancies ships bigger than 2,000 passengers for a trip to Greenland.

What kind of ship would you prefer for a cruise to Greenland?
Basis: Potential cruise travellers to Greenland (details in annex, line E)
Source: Visit Greenland market studies 2023 by NIT

Potential travellers to Greenland: Preferred sources for inspiration & information

all figures in %

Internet Search Engine	52	52	54	59	49
Destination websites (e.g. visitgreenland.com,)	33	45	50	50	47
Travel review websites (e.g. TripAdvisor)	30	38	45	38	45
Guide book	38	51	32	21	34
Travel Agent	35	36	31	31	34
Social Media (e.g. Facebook, Instagram, Twitter)	28	26	30	37	41
Online booking agent (e.g. Expedia, booking.com)	35	25	37	28	38
Tour Operator	34	31	26	33	26
Travel magazine	29	29	23	20	33
Books/literature	29	26	26	27	26
Personal Relations (friend, family, co-worker)	32	21	18	33	24
Personal knowledge	13	13	11	18	15
Newspaper	14	11	9	10	14

- For marketing purposes it is helpful to know the information sources that potential travellers prefer to use when thinking about travelling to Greenland.
- The results show that in all markets internet search engines dominate the ranking.
- Destination websites and travel review sites are also popular in all markets but with differences regarding their concrete ranking.
- Besides these universal results, we see quite some differences between the markets.
- In France and Germany, guide books are quite popular, but only play a minor role in Scandinavia.
- Social Media is quite popular in North America and Scandinavia, but not so much in the other markets.
- Tour operators and travel agencies play quite an significant role in many markets – good for b2b marketing.

When thinking about travelling to Greenland, how would you like to look for inspiration/information for this trip?
Basis: Potential Greenland travellers (details in annex, line B)
Source: Visit Greenland market studies 2023 by NIT

Potential travellers to Greenland: Preferred kind of online content

all figures in %					
Pictures: natural and cultural attractions	64	69	69	72	71
Pictures: accommodation, activities and tours	53	58	57	61	57
Videos: nature and landscapes including natural phenomena	50	54	55	49	54
Videos: personal angle about local cultural traditions etc.	39	35	38	38	44
Short texts: 'how to get there/ get around', etc.	37	45	44	52	41
Short texts: stories and tips told by other travellers	33	35	39	48	36
Short texts: stories about the daily life told by locals	28	33	29	36	34
Contact options	28	38	31	33	32
Destination companies' newsletters	16	17	26	22	26
Social media posts/stories on Facebook/Twitter/Instagram etc.	15	18	20	18	24

- To get some ideas how to optimize online content when showing tourism offers of Greenland, potential travellers were asked about their preferred content when looking for online information regarding travelling to Greenland.
- Here, the ranking between the markets is quite similar. The Top-2 everywhere are pictures of attractions and pictures of tourism accommodation & activities.
- In most markets follow videos of attractions, the exception being Scandinavia, where texts regarding “how to get there” etc. are very important, too.
- In some markets, like Scandinavia, UK and France, texts seem to still play a more important role than in Germany and North America.
- In this set of content options, social media content comes last in all markets.

Which kind of content do you like to find when looking for online information about travelling to Greenland?
Basis: Potential Greenland travellers (details in annex, line B)
Source: Visit Greenland market studies 2023 by NIT

Potential travellers to Greenland: Final decisive input for a Greenland travel decision

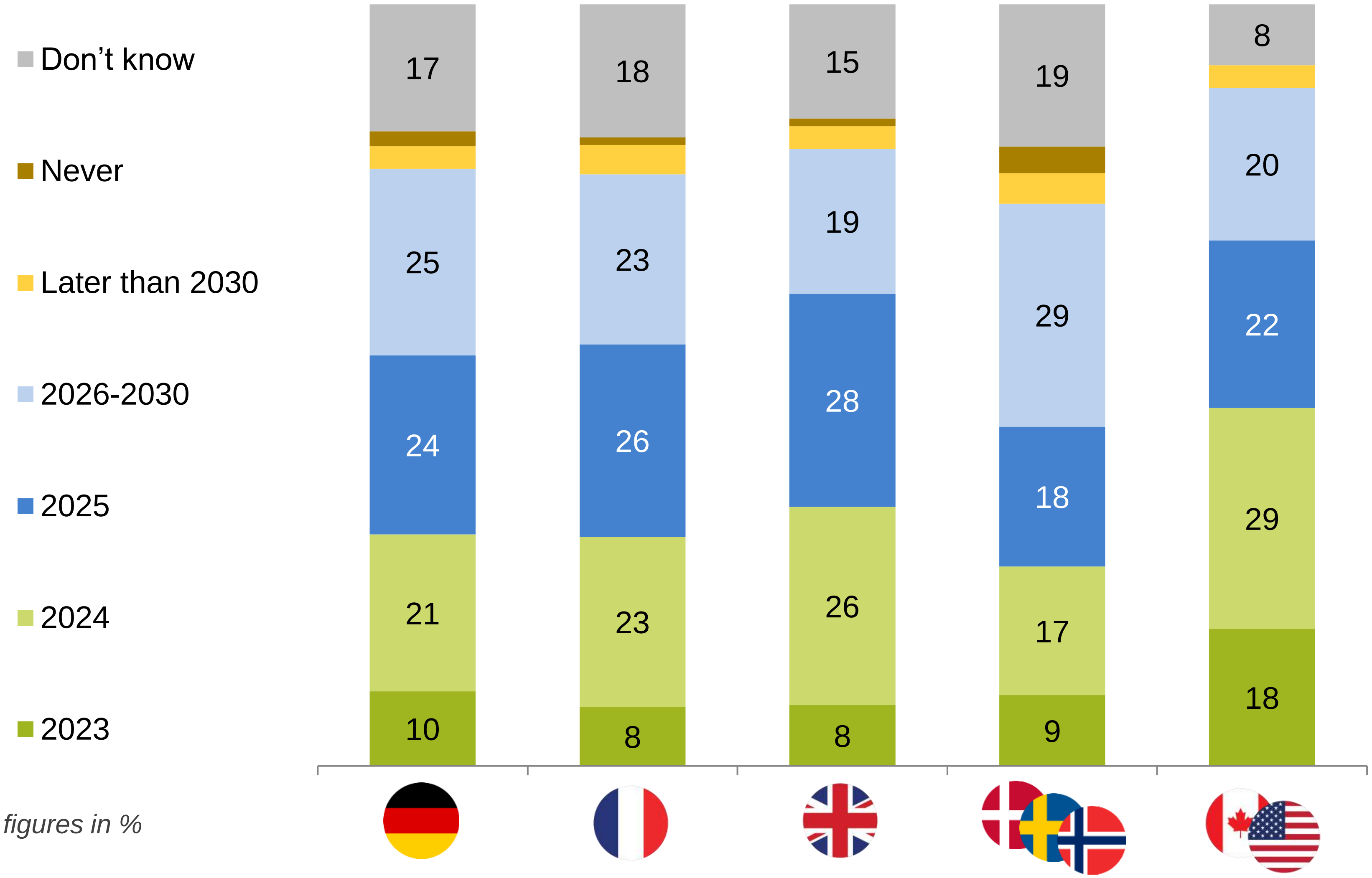
all figures in %

The right price/ the right travel offers	52	52	49	58	45
Advice from a travel agency/tour operator in my own country	33	29	28	30	27
Positive online reviews (on review sites like TripAdvisor)	23	22	40	26	34
Sample itineraries that are easy to book	30	33	29	21	29
Recommendations from friends/family/acquaintances	29	25	23	31	26
Advice from Visit Greenland professionals	22	28	29	24	27
Advice from local people living in Greenland	28	27	28	21	27
Advice from former Greenland tourists	24	26	22	28	27
Helpful video guides regarding most requested topics	26	21	24	19	28
Information via knowledgeable, semi-intelligent chatbot	12	8	13	9	17

- When being asked for the final decisive input that could make potential travellers decide for Greenland when they are almost ready book, the “right” offer with the “right” price is the dominating answer in all the markets.
- After that, all other options are much less important, but still there are some interesting hints how to deal with the different markets.
- Positive reviews could make a difference in UK and North America.
- Tour operators’ or travel agents’ advice is looked for in Germany.
- In many markets sample itineraries are quite popular.
- In the end, none of the options are so unimportant that they should be neglected and each of them might or might not play a role in the final decision of the individual potential traveller.

Please now imagine yourself being in a situation where you're almost ready to book, but still need the final decisive input. What kind of input would be most relevant for you?
Basis: Potential Greenland travellers (details in annex, line B)
Source: Visit Greenland market studies 2023 by NIT

Potential travellers to Greenland:
What year realistically to travel to Greenland?

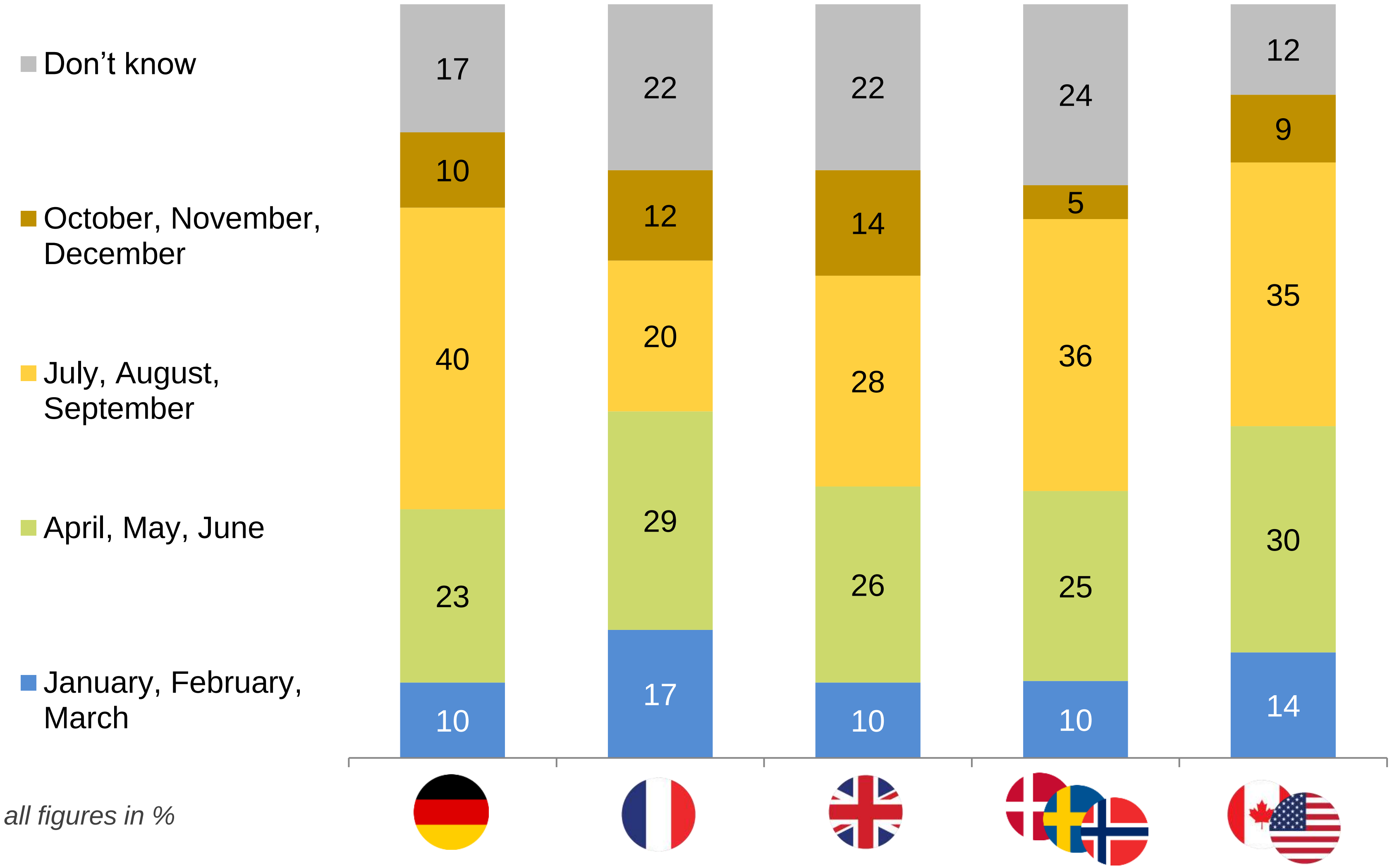


all figures in %

- To get some more ideas regarding the concreteness of Greenland travel plans of the potential travellers we have asked them more questions, the first one being about when they realistically think they will visit Greenland (the next time).
- Here we see the North Americans being the most optimistic to make it in 2023 or 2024 and the Scandinavians being the most pessimistic (or realistic?).
- In all markets, the majority thinks they will make to Greenland in 2025 or later, and there is quite a large proportion of potential travellers who simply doesn’t know.
- This info could also be used in further analyses of the survey data, in case you would like to sharpen the segment of potential travellers by focussing on those who have more concrete plans than others.

When, realistically, do you think you will visit Greenland?
Basis: Potential Greenland travellers (details in annex, line B)
Source: Visit Greenland market studies 2023 by NIT

Potential travellers to Greenland: What months to travel to Greenland?

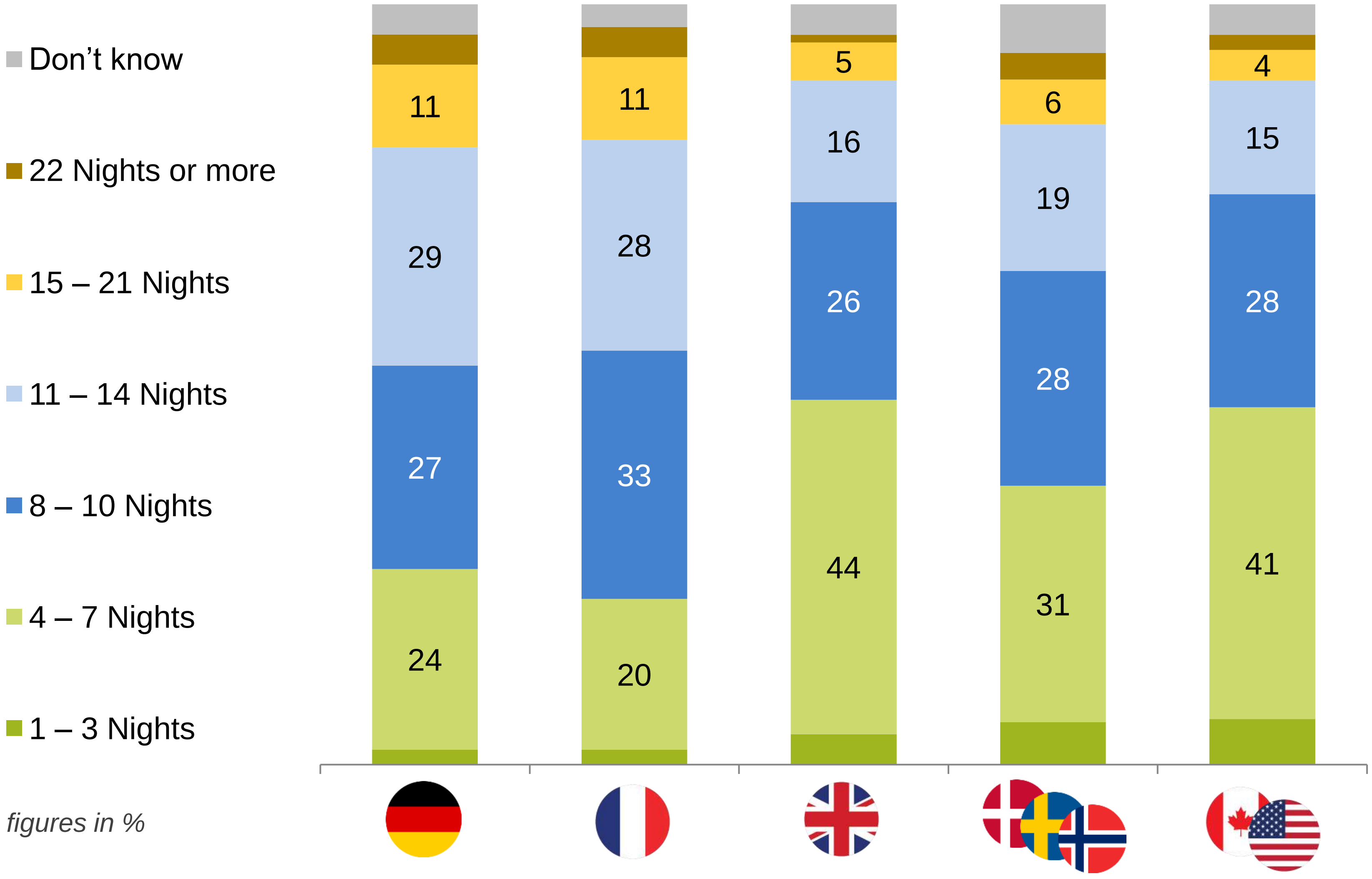


all figures in %

- The next question regarding trying to understand more concretely the Greenland travel plans of potential travellers is about the season, when they would like to visit.
- In all markets except France, the months July, August, September are preferred by the biggest group of potential travellers.
- April, May, June, is also very popular, in fact the most popular months in France (maybe due to the importance of ice/glaciers and dog-sledding?).
- Compared to these two seasons, the other months of the year are much less important.
- Again, and plausibly so, there is quite a large proportion of potential travellers who simply doesn’t know.

What would be your preferred months for a visit to Greenland?
Basis: Potential Greenland travellers (details in annex, line B)
Source: Visit Greenland market studies 2023 by NIT

Potential travellers to Greenland: How long to stay in Greenland?

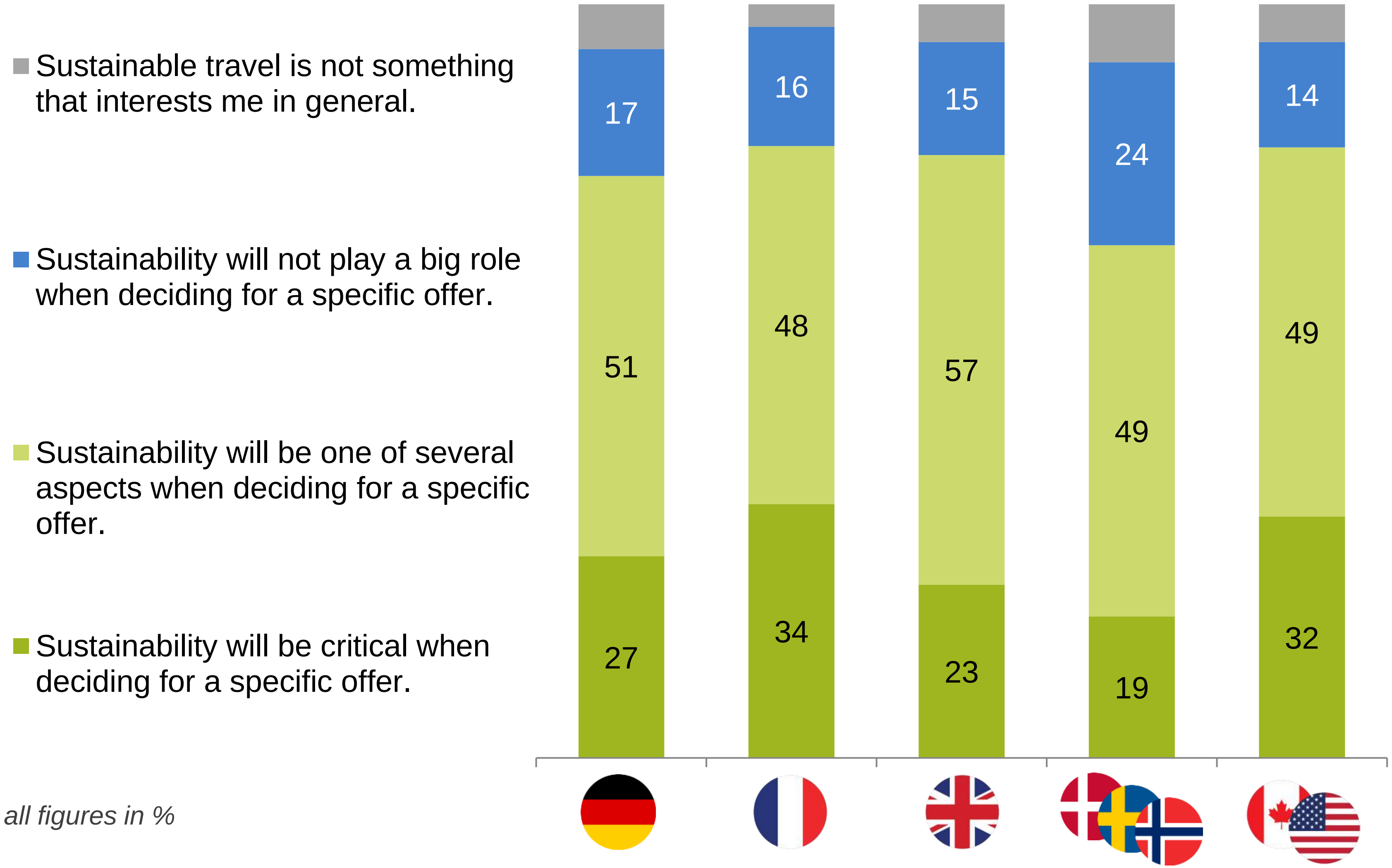


all figures in %

- Here we now see the preferred duration for the (next) trip to Greenland by the potential travellers.
- Regarding this topic, the discrepancies between the markets are quite large: In the UK and North America, more than 40% of the potential travellers only want to stay for 4-7 nights in Greenland, compared to 20% resp. 24% in France and Germany.
- This means in France and Germany a preference for trips to Greenland between one and two weeks is dominating.
- In all markets we only find quite few people who would like to stay longer than two weeks or who don’t know.

How much time would you like to spend during your next trip to Greenland?
Basis: Potential Greenland travellers (details in annex, line B)
Source: Visit Greenland market studies 2023 by NIT

Potential travellers to Greenland: Role of sustainability when planning the trip

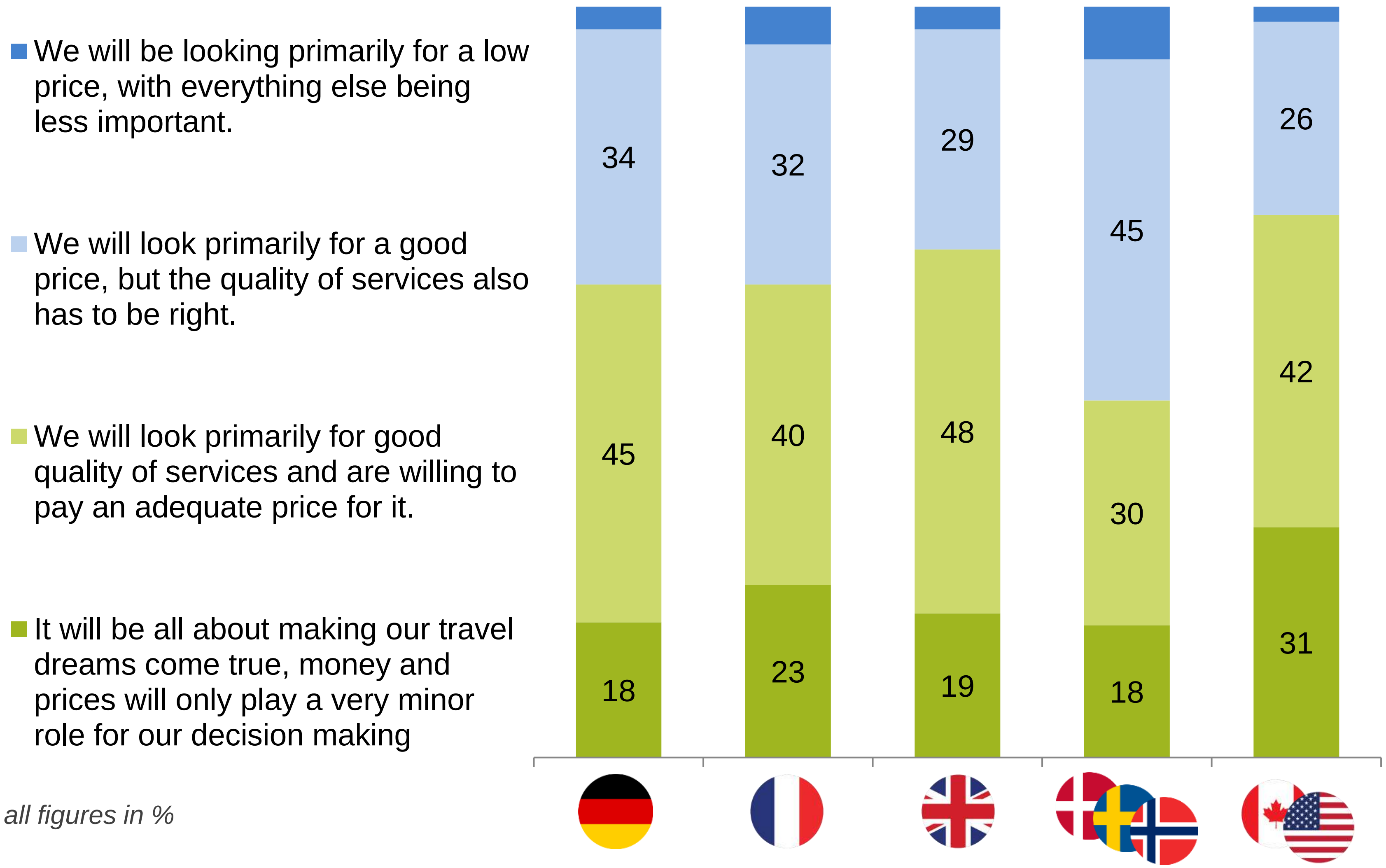


all figures in %

- The last two questions for the potential travellers regarding their travel planning of a trip to Greenland are regarding the importance of the issue of sustainability and regarding the role of price and quality of the actual offer.
- When looking at the results of the sustainability question, we see that for a majority of potential travellers in all the markets sustainability is an aspect that is taken into account when planning a trip to Greenland.
- The segment "sustainability will be one of several aspects when deciding" is the biggest in all markets (between 48% and 57%).
- The range of sustainability being critical for the decision is between 19% and 34%.

What do you think, how important will be the issue of sustainability when planning a trip to Greenland?
Basis: Potential Greenland travellers (details in annex, line B)
Source: Visit Greenland market studies 2023 by NIT

Potential travellers to Greenland:
Price and quality preferences when travelling to Greenland



all figures in %

- The aim of this question was to find out to what extend potential travellers are looking at the price and/or the quality of a tourism offer when planning a trip to Greenland.
- First of all, almost nobody in none of the market is looking for a cheap price alone.
- For most it is a mix of price and quality, in all markets but Scandinavia with a bigger emphasis on quality.
- The very interesting group of “making a dream come true” ranges between 18% and 31%.
- This group could be interesting for further analyses of the survey data.

Regarding the factors of price and quality, what do you think will be true for you when travelling to Greenland?
Basis: Potential Greenland travellers (details in annex, line B)
Source: Visit Greenland market studies 2023 by NIT

To learn 3.1:
Product preferences of potential travellers to Greenland 2023

Experiences:

» When asked for desired experiences in Greenland, stunning scenery, natural phaenomena, wildlife and glaciers/icebergs are very important in all the markets. Somewhat striking are the high figures for glaciers/icebergs in France and for wildlife in Scandinavia. Generally, nature-focussed experiences dominate over culture-focussed experiences.

Activities:

» While seeing a lot of similarities between the markets regarding the desired activities in Greenland, there are also some striking differences.

» In Germany the Top-3 activities are experiencing quietness, photography and hiking. In France it is dog-sledding, experiencing quietness and wildlife. In the UK, Scandinavia and North America wildlife is top, followed by culinary and nature excursions (UK), hiking and nature excursions (Scandinavia) and culinary and photography (North America).

Getting there/around:

» Most potential Greenland travellers in all the markets would prefer flying to Greenland, with total figures between 91% in North America and 79% in Germany. Arriving by cruise ship to Greenland is also an option for many potential travellers, concretely between 45% in North America and 37% in UK and Scandinavia.

» Most potential plane travellers prefer a stay in Greenland at several different locations; regarding organisation, the segment of plane travellers is divided in those who prefer group and those who prefer individual travel. Most of them are preferring to book with a tour operator.

» The majority of potential cruise tourists prefer smaller ships under 1,000 passengers. Almost nobody favours ships with more than 2,000 passengers.

Information sources:

» The results show that in all markets internet search engines dominate the ranking of preferred information sources when planning a trip to Greenland. Destination websites and travel review sites are also popular in all markets but with differences regarding their concrete ranking. Tour operators and travel agencies play quite an significant role in many markets – good for b2b marketing.

» Besides these universal results, we see quite some differences between the markets. In France and Germany, guide books are quite popular, but only play a minor role in Scandinavia. Social Media is quite popular in North America and Scandinavia, but not so much in the other markets.

Online content:

» When asked for their preferred kind of online content, most potential Greenland guests all markets favour destination images ahead of product images and factual texts on the travel product.

Final decisive input:

» In this phase right before the travel decision to Greenland it is crucial to find the “right” product with the “right” price. After that, all other options are much less important, but still there are some interesting hints how to deal with the different markets.

More conclusions on the next slide →

To learn 3.2:
Product preferences of potential travellers to Greenland 2023

Realistic year of Greenland visit:

- In all markets, the majority thinks they will make to Greenland in 2025 or later, and there is quite a large proportion of potential travellers who simply doesn’t know. Around one third of the potential travellers imagine to travel to Greenland in 2023 or 2024.

Preferred months of Greenland visit:

- In all markets except France, the months July, August, September are preferred by the biggest group of potential travellers. April, May, June, is also very popular, in fact the most popular months in France (maybe due to the importance of ice/glaciers and dog-sledding?). Compared to these two seasons, the other months of the year are much less important.

Preferred duration of trip to Greenland:

- In the UK and North America, more than 40% of the potential travellers only want to stay for 4-7 nights in Greenland, compared to 20% resp. 24% in France and Germany. This means in France and Germany a preference for trips to Greenland between one and two weeks is dominating. In all markets we only find quite few people who would like to stay longer than two weeks or who don’t know.

Sustainability when planning a trip to Greenland:

- For a majority of potential travellers in all the markets sustainability is an aspect that is taken into account when planning a trip to Greenland. The segment “sustainability will be one of several aspects when deciding” is the biggest in all markets (between 48% and 57%). The range of sustainability being critical for the decision is between 19% and 34%.

Price & quality when planning a trip to Greenland:

- Almost nobody in none of the market is looking for a cheap price alone. For most potential Greenland travellers it is a mix of price and quality, in all markets but Scandinavia with a bigger emphasis on quality. The very interesting group of “making a dream come true” ranges between 18% and 31%.

- This chapter is basically the CORE of the study and was the focus of the questionnaire.
- The results help to understand in detail how the potential travellers would like to spend their holidays in Greenland. This knowledge should give you substantial help with regard to product development, marketing strategy and communication.
- It is even possible and smart to go deeper into different segments of potential guests in further analyses of the survey data.

4. Greenland product preferences: Timeline comparison

Photo by Mads Pihl - Visit Greenland

Potential travellers to Greenland, timeline comparison: Preferred holiday experiences in Greenland

all figures in %

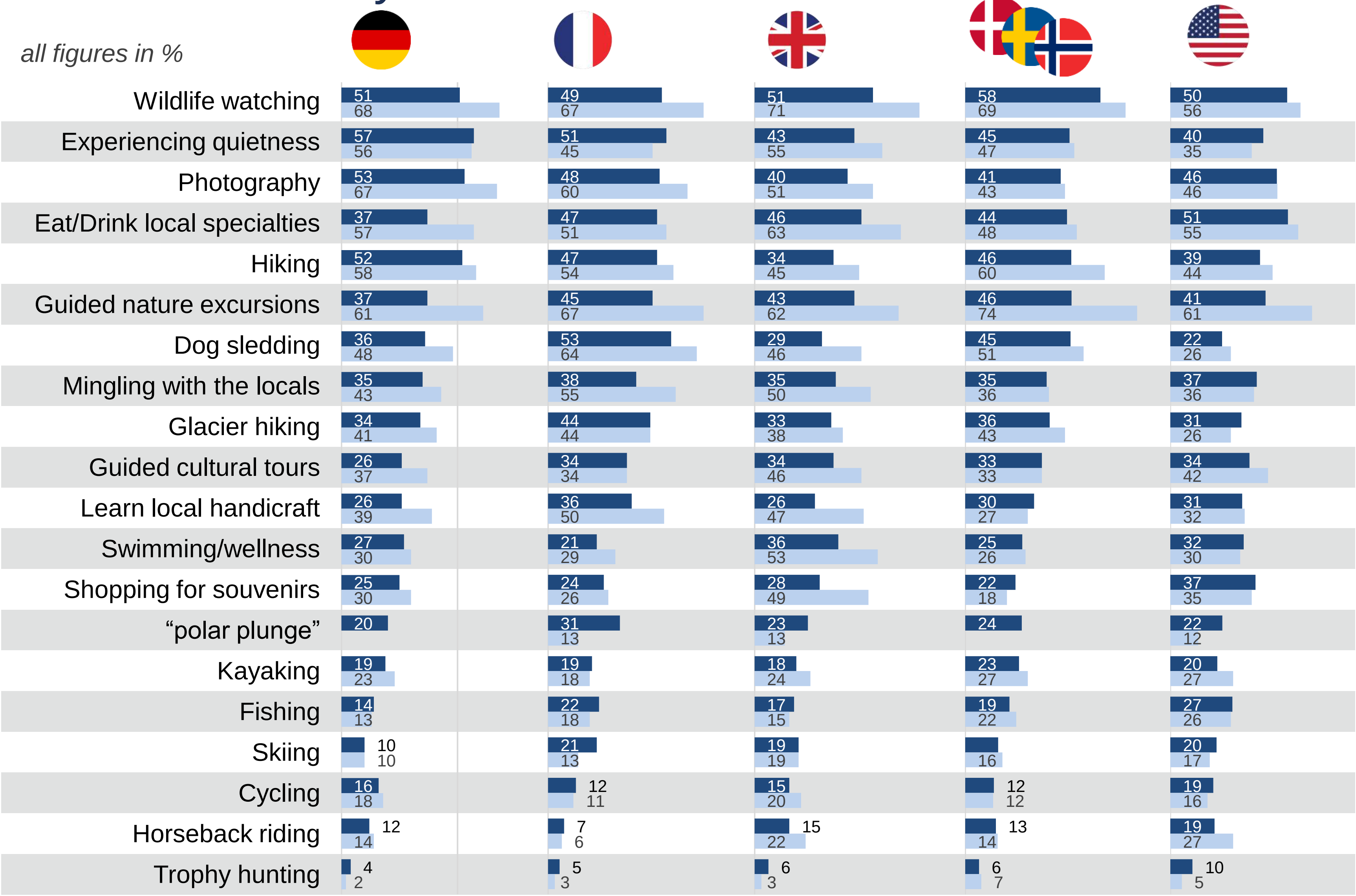
Stunning scenery (e.g. mountains, fjords, cliffs)	62 / 81	63 / 72	64 / 86	67 / 78	63 / 64
Natural phenomena (e.g. Northern Lights, Midnight Sun)	61 / 79	61 / 70	57 / 84	62 / 64	55 / 57
Wildlife (e.g. whales, birds, musk ox, reindeer)	54 / 70	53 / 60	56 / 75	66 / 67	54 / 55
Glaciers/Icebergs	55 / 70	69 / 76	56 / 79	54 / 70	47 / 55
Traditional villages	40 / 50	53 / 55	47 / 60	47 / 47	49 / 47
New and unexpected experiences	38 / 44	44 / 44	43 / 60	49 / 51	47 / 48
Historic sights/events	31 / 35	34 / 27	42 / 55	38 / 30	45 / 43
Volcanoes/Hot springs/Geysers	42 / 59	36 / 47	42 / 72	31 / 29	33 / 40
Contemporary culture/lifestyle	28 / 28	34 / 34	35 / 47	23 / 29	38 / 39
Capitals/Cities	29 / 27	34 / 23	25 / 44	25 / 23	28 / 30

- For some questions about the desires of potential travellers, it is possible to compare the results of the 2023 study with previous studies (2018: Scandinavia, 2017: France, 2016: Germany, UK, USA).
- In general, we can observe that the ranking of preferred experiences has remained stable over time – at the same time we see some obvious decreases in many markets regarding many aspects.
- One reason for this could be that now we have a bigger potential than before, but also a potential that is somewhat less knowledgeable and/or involved into Greenland as a travel destination.
- Interestingly, there seem to be bigger drops in nature-focussed experiences than in culture-focussed experiences – so nature is still dominating but to a lesser extend than before.

When thinking about travelling to Greenland what would you like to see/experience?
Basis: Potential Greenland travellers (details in annex, line B)
Source: Visit Greenland market studies 2023 by NIT & previous studies of 2016/2017/2018

Dark blue bar: 2023 survey results
Light blue bar: 2016/2017/2018 survey results

Potential travellers to Greenland, timeline comparison: Preferred holiday activities in Greenland

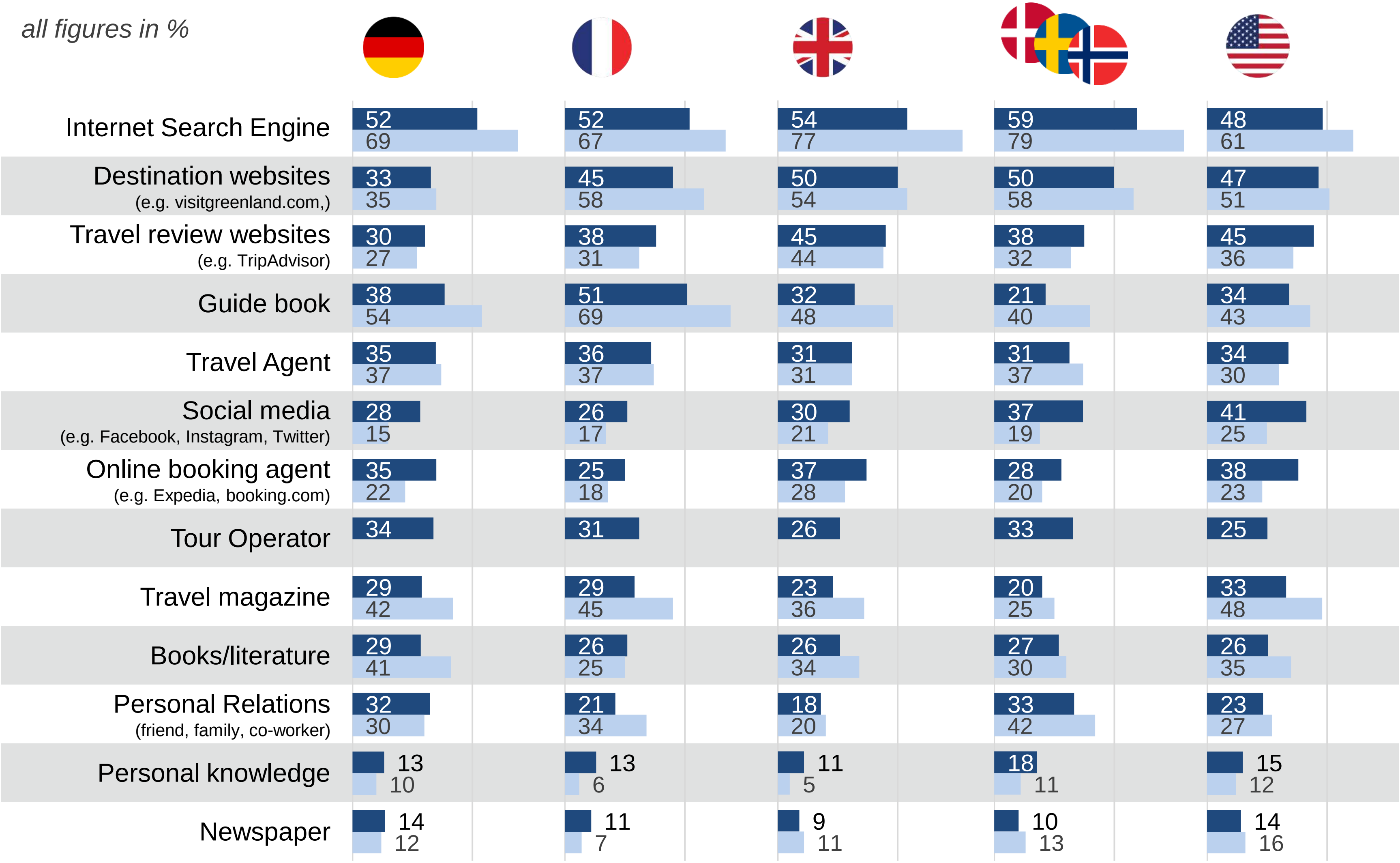


- The timeline comparison of preferred activities in Greenland shows a similar picture as the timeline comparison of desired experiences.
- The general ranking stays more or less the same, but significant drops regarding many activities in many markets can be observed.
- One reason behind this could be the increase of potential travellers (see previous slide).
- Again, nature-focussed activities (most notably guided nature excursion) see a bigger decrease than culture-focussed activities.
- Niche activities regarding physical exercise (e.g. kayaking, fishing, skiing) appear to be most stable.

Which of the following activities would you like to do when travelling to Greenland?
Basis: Potential Greenland travellers (details in annex, line B)
Source: Visit Greenland market studies 2023 by NIT & previous studies of 2016/2017/2018

Dark blue bar: 2023 survey results
Light blue bar: 2016/2017/2018 survey results

Potential travellers to Greenland, timeline comparison: Preferred sources for inspiration & information



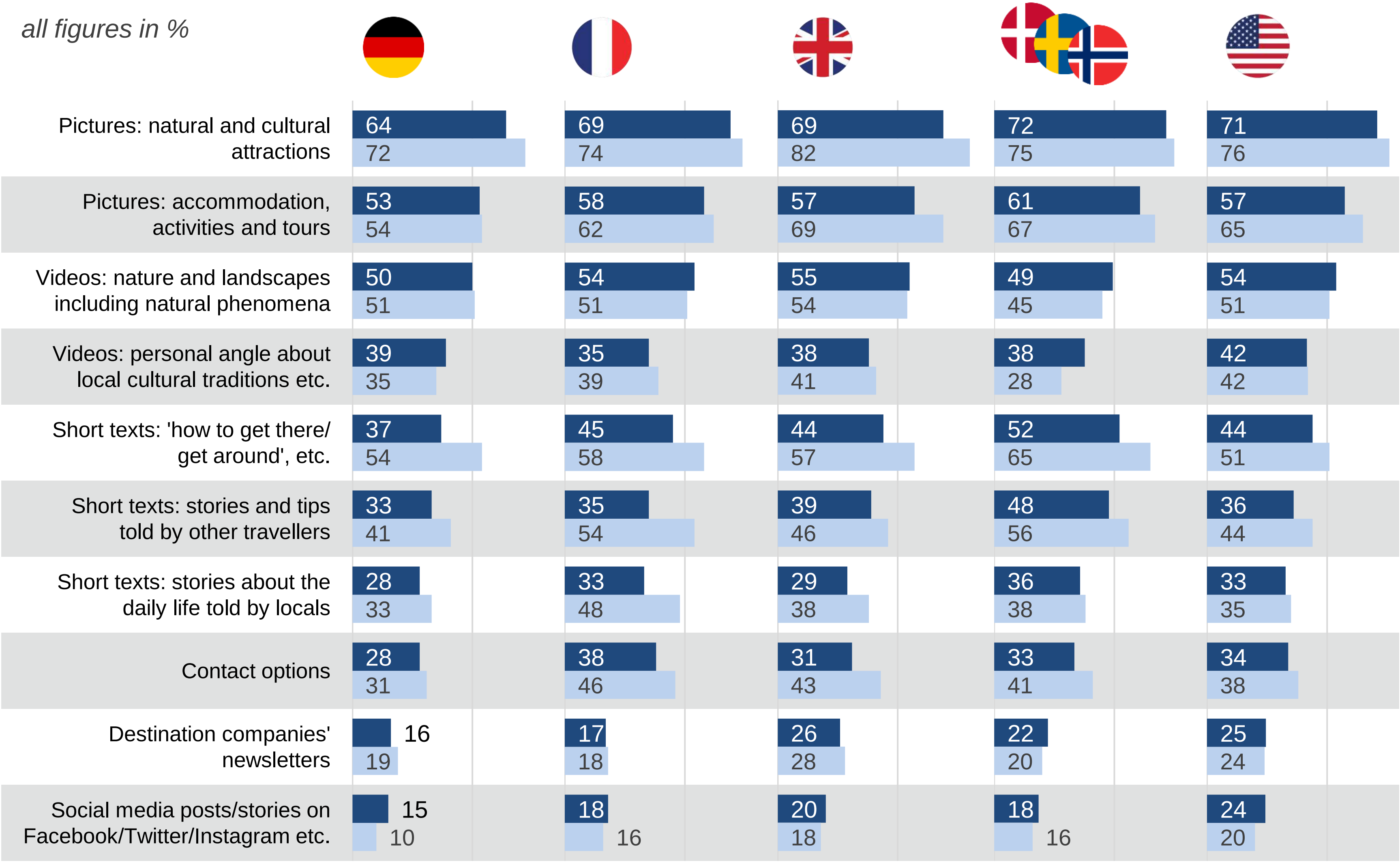
- The timeline comparison of preferred information sources that potential travellers would like to look at for planning their trip to Greenland shows a somewhat different dynamic than with the preferred experiences and activities.
- In general, we can observe increases for the online sources and decreases for the offline sources.
- Most notably are the increases for Social Media and Online Booking Agents in all the markets.
- There are some exceptions, though: Online, there is a quite steep decline for internet search engines and a slight decrease for destination websites. Offline, travel agents and personal relations are very stable or even slightly increasing in some markets.

When thinking about travelling to Greenland, how would you like to look for inspiration/information for this trip?
Basis: Potential Greenland travellers (details in annex, line B)
Source: Visit Greenland market studies 2023 by NIT & previous studies of 2016/2017/2018

Dark blue bar: 2023 survey results
Light blue bar: 2016/2017/2018 survey results

Potential travellers to Greenland, timeline comparison: Preferred kind of online content

all figures in %



- Also the question regrading the preferred online content when looking for online information about travelling to Greenland is showing some timeline dynamics.
- The ranking of 2023 is quite similar with the previous studies, nevertheless there seem to be some dynamics which are similar in all the markets.
- While pictures remain most popular, there is a slight decrease in the figures.
- Different kinds of videos follow, in most markets with a slight upward trend.
- Short texts are next in the ranking, all showing significant decreases of their figures.
- Social media was and stays last in line.

Which kind of content do you like to find when looking for online information about travelling to Greenland?
Basis: Potential Greenland travellers (details in annex, line B)
Source: Visit Greenland market studies 2023 by NIT & previous studies of 2016/2017/2018

Dark blue bar: 2023 survey results
Light blue bar: 2016/2017/2018 survey results

To learn 4:
Greenland product preferences: Timeline comparison

Experiences:

- In general, we can observe that the ranking of preferred experiences has remained stable over time – at the same time we see some obvious decreases in many markets regarding many aspects.
- One reason for this could be that now we have a bigger potential than before, but also a potential that is somewhat less knowledgeable and/or involved into Greenland as a travel destination.
- Interestingly, there seem to be bigger drops in nature-focussed experiences than in culture-focussed experience – so nature is still dominating but to a lesser extend than before.

Activities:

- The general ranking stays more or less the same, but significant drops regarding many activities in many markets can be observed. Again, nature-focussed activities (most notably guided nature excursion) see a bigger decrease than culture-focussed activities. Niche activities regarding physical exercise (e.g. kayaking, fishing, skiing) appear to be most stable.

Information sources:

- Regarding preferred information sources that potential travellers would like to look at for planning their trip to Greenland, we can observe in general increases for the online sources and decreases for the offline sources in all the markets.
- There are some exceptions, though: Online, there is a quite steep decline for internet search engines and a slight decrease for destination websites. Offline, travel agents and personal relations are very stable or even slightly increasing in some markets.

Online content:

- Regrading the preferred online content when looking for online information about travelling to Greenland the ranking of 2023 is quite similar with the previous studies. Nevertheless, there seem to be some dynamics which are similar in all the markets.
- While pictures remain most popular, there is a slight decrease in the figures. Different kinds of videos follow, in most markets with a slight upward trend. Short texts are next in the ranking, all with showing significant decreases of their figures. Social media was and stays last in line.

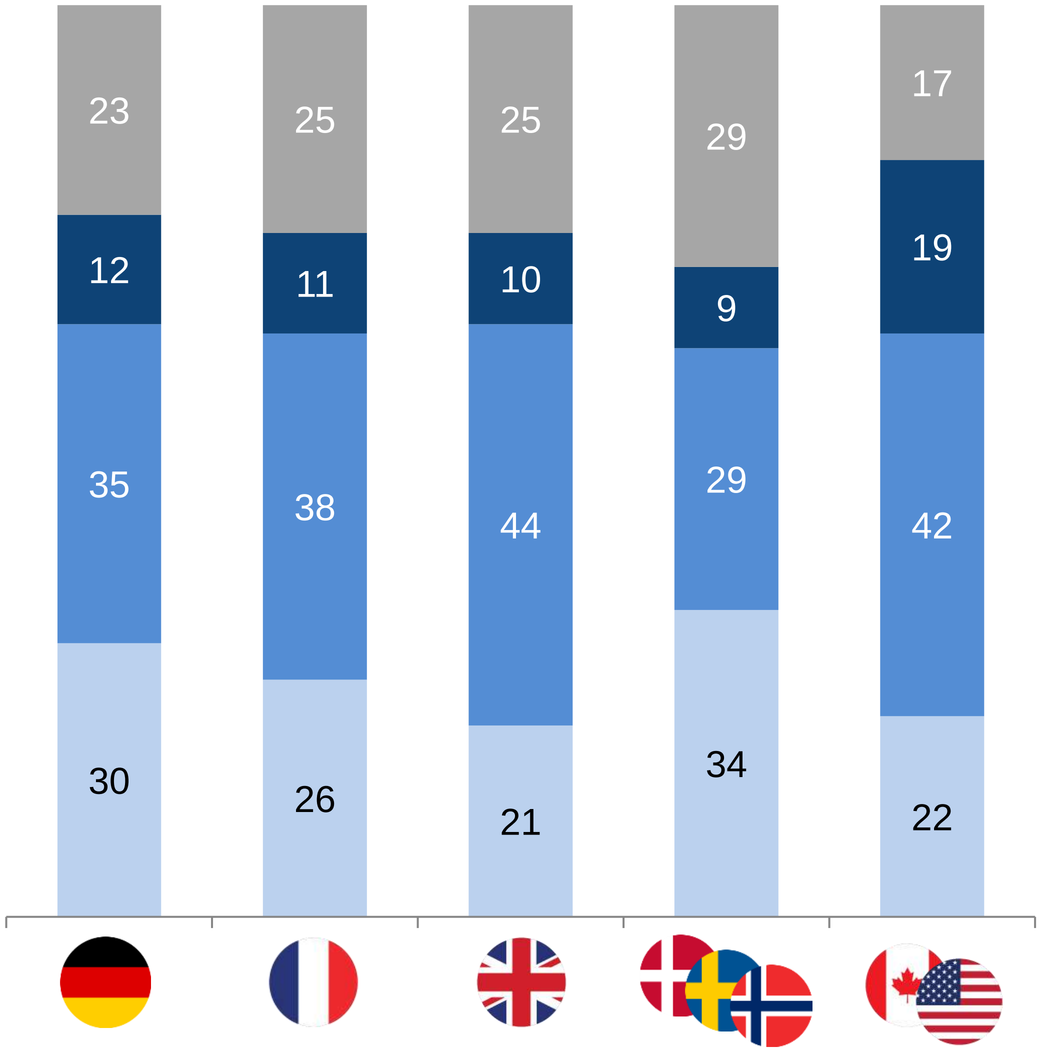
- The timeline comparison shows important trends and helps to interpret the results regarding product preferences in a better way.
- Regarding experiences and activities the dynamics between nature, culture, and physical exercise are very interesting.
- The results about the information sources and online content on the one hand confirm general trends, like more online less offline and more visual content rather than text. But on the other hand they show that it is worthwhile and necessary to look into the details to make the right decisions in the end.

5. Segmentation: Adventure & Sustainability

Photo by Mads Pihl - Visit Greenland

Visit Greenland adventurer segmentation of potential guests

- None of the Visit Greenland adventure segments
- Ultimate Adventurer (a full 'deep dive' into nature and/or physical challenges, and/or 'living like a local' to have as
- Immersive Adventurer (some degree of physical activity, and more engaged contact with locals and the local culture)
- Soft Adventurer (comfort, a little physical exertion, and a more observant approach to local culture)



all figures in %

» Visit Greenland developed a segmentation model build on different levels of "adventure". Here you can find all about this segmentation approach: https://traveltrade.visitgreenland.com/latest-news/new-simplified-segmentation/

» Looking at the results of our survey, we first see that in Europe more than 70% and in North America more than 80% of the potential Greenland travellers fit into one of the adventurer segments.

» 21% to 34% belong to the "soft adventurers"

» 29% to 44% belong to the "immersive adventurers"

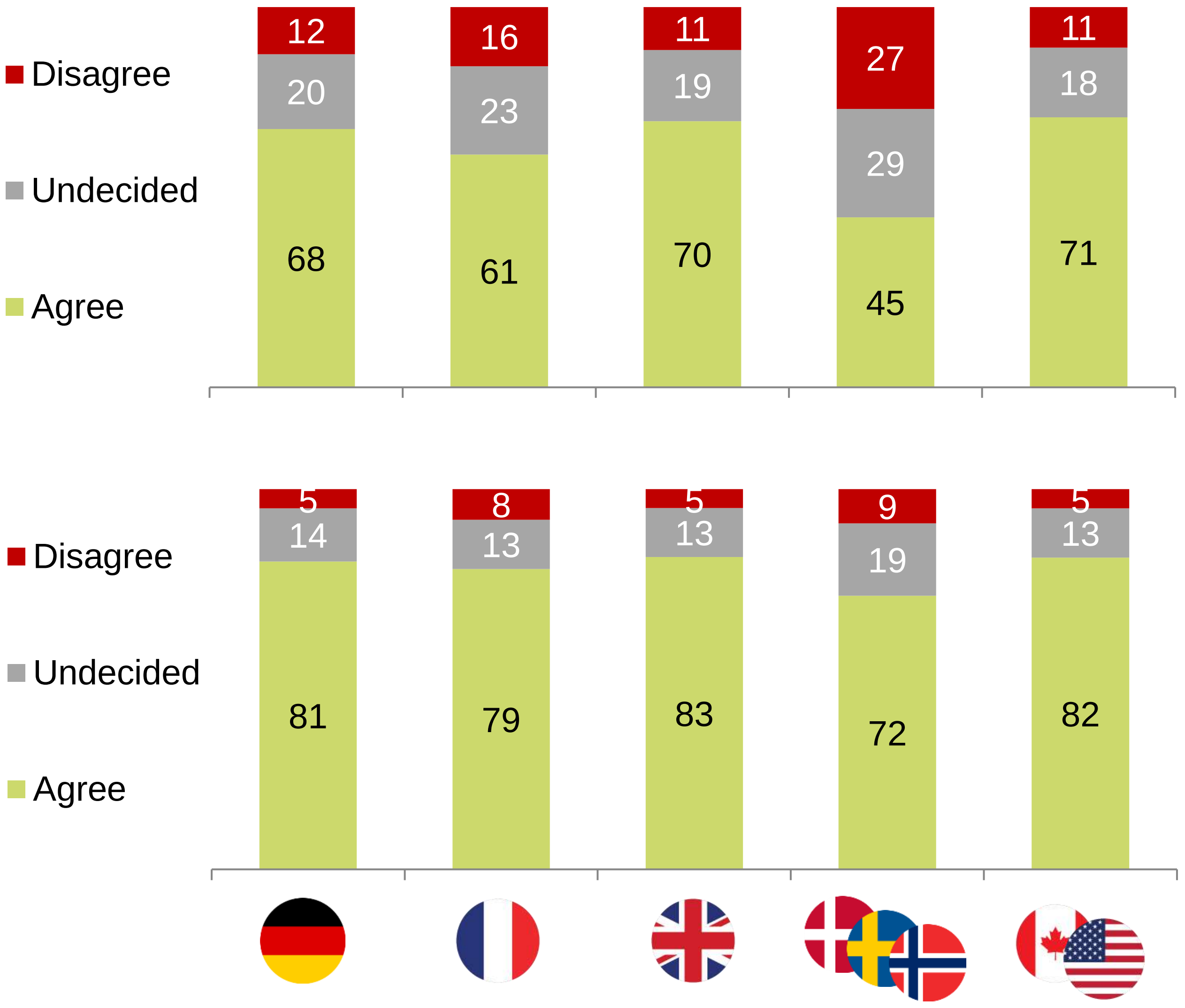
» And between 9% and 19% are "ultimate adventurers".

If you had to identify as one of the following tourist types, which one would it be?
Basis: Potential Greenland travellers (details in annex, line B)
Source: Visit Greenland market studies 2023 by NIT

Ecological & social sustainability attitude of potential guests

My holiday should be as **ecologically sound** as possible, be resource saving and environmentally friendly.

My holiday should be as **socially acceptable** as possible (i.e. fair working conditions for staff and respect for the local population).



all figures in %

- With growing concern for sustainability it is crucial to know the attitude of potential travellers to Greenland to assess the need of adjusting products and their marketing towards a more sustainable approach.
- Generally, it can be observed that in all markets a very high share of potential Greenland travellers want their holidays to be ecologically and socially sustainable.
- In all markets, social sustainability is more important than ecological sustainability.
- While the figures for social sustainability are quite similar in all the markets, the ones for pro-ecological sustainability differ quite a lot, between 45% and 71%.
- *Note: The low figures in Scandinavia may be due to the fact that ecological behaviour there is so much in the DNA that is not worth mentioning any more.*

Below are two statements about holidays in general. Please indicate the extent to which each of these statements is relevant to you.
Basis: Potential Greenland travellers (details in annex, line B)
Source: Visit Greenland market studies 2023 by NIT

To learn 5:
Segmentation: Adventure & Sustainability

Visit Greenland adventurer segmentation:

» Visit Greenland developed a segmentation model build on different levels of "adventure". Here you can find all about this segmentation approach: https://traveltrade.visitgreenland.com/latest-news/new-simplified-segmentation/

» Looking at the results of our survey, we first see that in Europe more than 70% and in North America more than 80% of the potential Greenland travellers fit into one of the adventurer segments. 21% to 34% belong to the "soft adventurers". 29% to 44% belong to the "immersive adventurers". And between 9% and 19% are "ultimate adventurers".

Ecological & social sustainability attitude:

» With growing concern for sustainability it is crucial to know the attitude of potential travellers to Greenland to assess the need of adjusting products and their marketing towards a more sustainable approach.

» Generally, it can be observed that in all markets a very high share of potential Greenland travellers want their holidays to be ecologically and socially sustainable. In all markets, social sustainability is more important than ecological sustainability. While the figures for social sustainability are quite similar in all the markets, the ones for pro-ecological sustainability differ quite a lot, between 45% and 71%.

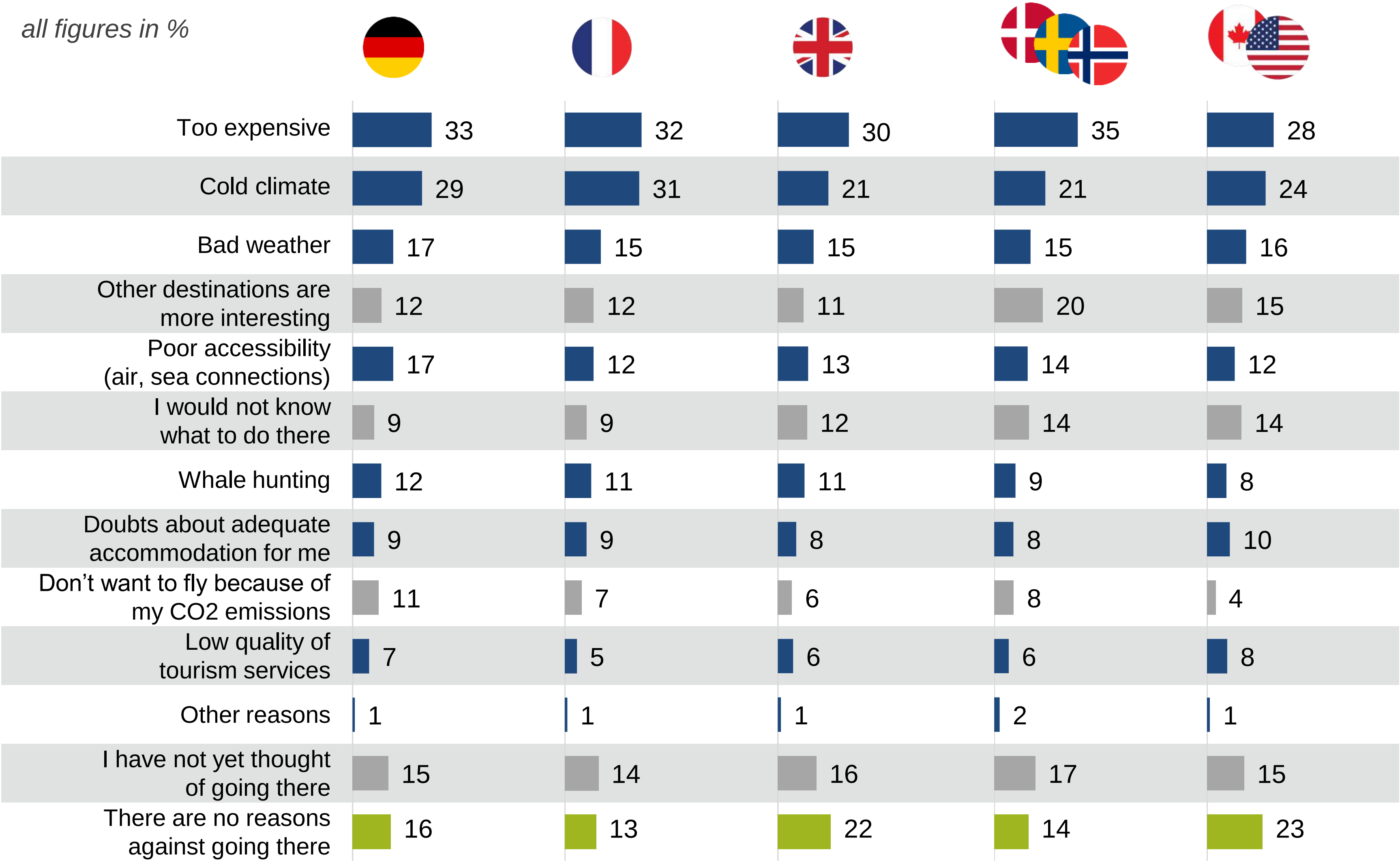
» The Visit Greenland segmentation approach is on the one hand very helpful to further understand the potential Greenland travellers, on the other hand it enables us to target the different segments according to their size and needs.

» The questions regarding ecological and social sustainability attitude is a further possibility to dive deeper into the data.

6. Reasons against travelling to Greenland

Photo by Air Zafari & Mads Pihl - Visit Greenland

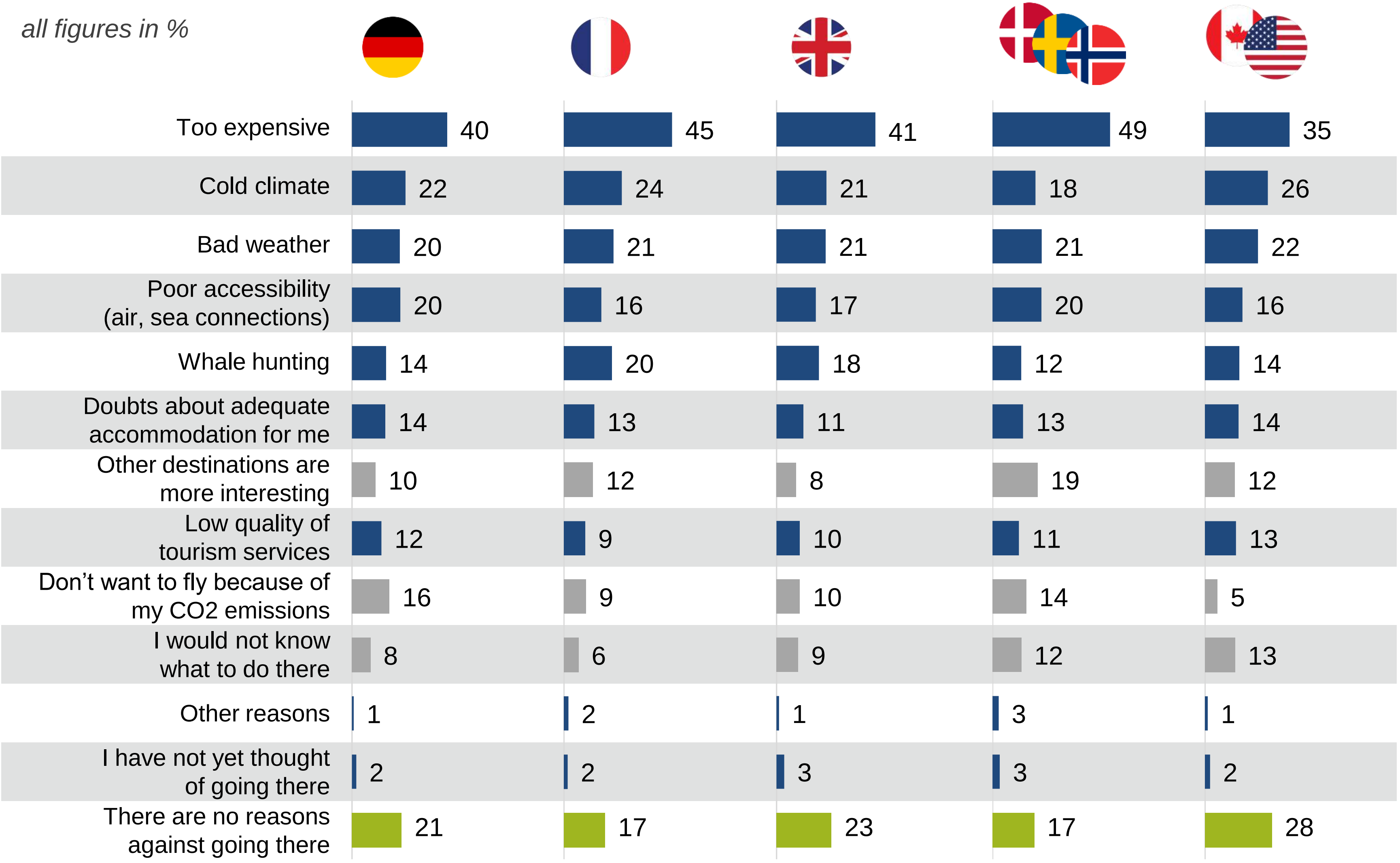
Reasons against travelling to Greenland (population)



- One of the final questions in the survey examines reasons against travelling to Greenland.
- The good news first: Between 13% and 23% of the population in the five markets have no general objections to travel to Greenland. In turn, this means that between 87% and 77%of the population named at least one objection against travelling to Greenland.
- Most important reasons against travelling to Greenland are the expected high costs, closely followed by the coldness. Poor accessibility and bad weather are also considerable reasons against travelling to Greenland.
- There are also important factors in place, that are not directly linked to the tourism offer in Greenland (marked grey).

What are reasons against travelling to Greenland?
Basis: All respondents (details in annex, line A)
Source: Visit Greenland market studies 2023 by NIT

Reasons against travelling to Greenland (potential travellers)



- » Even more important is to understand what might stop those interested in travelling to Greenland from going there.
- » Among the potential travellers between 17% and 28% see no reasons not to travel to Greenland. This indicates that even among the potential travellers to Greenland 72% to 83% have at least one objection against going there.
- » The main barrier seems to be the price. 35% to 49% of the potential travellers consider Greenland “too expensive”. Here figures are much higher than in the population.
- » Three other important barriers are the cold climate, poor accessibility and bad weather.
- » However, there are more doubts about the quality of tourism services and accommodation adequateness among the potential travellers than in the general population.

What are reasons against travelling to Greenland?
Basis: Potential Greenland travellers (details in annex, line B)
Source: Visit Greenland market studies 2023 by NIT

To learn 6:
Reasons against travelling to Greenland

Population:

- Between 13% and 23% of the population in the five markets have no general objections to travel to Greenland. In turn, this means that between 87% and 77%of the population named at least one objection against travelling to Greenland.
- Most important reasons against travelling to Greenland are the expected high costs, closely followed by the coldness. Poor accessibility and bad weather are also considerable reasons against travelling to Greenland.
- There are also important factors in place, that are not directly linked to the tourism offer in Greenland (marked grey).

Potential Greenland travellers:

- Among the potential travellers between 17% and 28% see no reason not to travel to Greenland. This indicates that even among the potential travellers to Greenland 72% to 83% have at least one objection against going there.
- The main barrier seems to be the price. 35% to 49% of the potential travellers consider Greenland “too expensive”. Here figures are much higher than in the population. Three other important barriers are the cold climate, poor accessibility and bad weather.
- However, there are more doubts about the quality of tourism services and accommodation adequateness among the potential travellers than in the general population.

- The results of chapter 1 show a huge potential of people interested to travel to Greenland in the five markets.
- To transform these potential guests into actual ones, it is not only important to know what they want (chapter 3 and 4) but also the possible reasons against travelling to Greenland.
- The results of this chapter give hints what to address in your communication and product (price, climate, access) etc.
- The results also show the differences in the markets, which might help you for more precise targeting.

7. Summary and main conclusions

Summary & main conclusions: SIMILARITIES of markets

Status 2023:

- **Greenland is on the map in all the markets**
  Consumers in all markets are aware of Greenland as a travel destination. They know what to expect there and a small share of the population is interested to travel there.

- **High interest – fierce competition**
  Compared to actual travellers, there is a huge interest to travel to Greenland. On the other hand there is a fierce competition with other remote destinations, above all with ICELAND → Here lies also an opportunity, as many potential travellers to Greenland are interested in combining Greenland and Iceland in one trip.

- **Image and experiences in Greenland**
  Potential travellers are imagining unspoilt nature, quietness and a not touristic place – and they want to experience the scenery, natural phaenomena and wildlife → You can see that Greenland's main assets are quite fragile, potentially quickly endangered by too many tourists at the same time

- **Travel planning**
  Online and offline sources are being used for inspiration – for travelling some prefer is individual, some prefer the help of a tour operator and like to travel in a group. Generally, the "right product for the right price" is what most people need to make the final decision for Greenland → Need for an appropriate multi-channel marketing mix, working b2b and b2c. Worthwhile to look for the characteristics of the different markets.

Trends since 2016/2017/2018:

- **Interest for Greenland has increased a lot**
  In all markets the interest to travel to Greenland (and to most other remote destinations) has increased – in some markets quite dramatically (e.g. DE, UK, US). *Two methodological observations regarding this trend in DE, UK, US: These are the markets with the "oldest" baseline surveys (2016) and the set of destinations in the 2016 version was very different from the 2023 edition.*

- **Nature still dominates, but culture is becoming more important**
  Some results of the desired experiences and activities are somewhat lower than before – most prominently in the markets with the highest growth of the interest for Greenland. Interestingly, there seem to be bigger drops in nature-focussed experiences than in culture-focussed experience – so nature is still dominating but to a lesser extend than before. This is also true for the activities: Again, nature-focussed activities (most notably guided nature excursion) see a bigger decrease than culture-focussed activities. Niche activities regarding physical exercise (e.g. kayaking, fishing, skiing) appear to be most stable.

- **Information sources – more online but need to look carefully**
  Regarding preferred information sources that potential travellers would like to look at for planning their trip to Greenland, we can observe in general increases for the online sources and decreases for the offline sources in all the markets. There are some exceptions, though: Online, there is a quite steep decline for internet search engines and a slight decrease for destination websites. Offline, travel agents and personal relations are very stable or even slightly increasing in some markets.

Summary & main conclusions: DIFFERENCES of markets

- Quite big market by volume and share.
- Top-3 activities: experiencing quietness, photography and hiking.
- Information sources: Guide books, OTAs, travel agents and tour operators are more important than in other markets.
- Preference for July/ August/September; staying 8-14 nights

- Smallest market by volume and share
- Top-3 activities: dog-sledding, experiencing quietness and wildlife watching
- Information sources: Guide books, destination websites, travel agents and tour operators are more important than in other markets.
- Preference for January-June; staying 8-14 nights
- Big share of "travel dream make true"

- Quite big market by volume and share (but not so much by actual arrivals, yet).
- Top-3 activities: wildlife watching, culinary and nature excursions
- Information sources: Destination websites, travel review sites and OTAs are more important than in other markets.
- Preference for April-Sept; staying 4-7 nights
- Biggest share of "immersive adventurer"

- Quite small by volume but quite big by share.
- Top-3 activities: wildlife watching, hiking and nature excursions.
- Information sources: Destination websites, travel review sites, Social Media and personal relations are more important than in other markets.
- Preference for April-Sept; staying 4-10 nights
- Big share of "good price"
- Biggest share of "soft adventurer"

- Biggest market by volume and share; *but careful: tends to be over-enthusiastic compared to European markets*
- Top-3 activities: wildlife watching, culinary and photography.
- Information sources: Destination websites, travel review sites, Social Media and OTAs are more important than in other markets.
- Preference for April-Sept; staying 4-10 nights
- Biggest share of "travel dream make true"
- Biggest share of "extreme adventurer"

Altogether, these conclusions show that there are a lot of similarities between the five markets.
Nevertheless, all markets have their peculiarities and it is very worthwhile to look at them individually!

Photo by Ulf Sonntag

NIT
NEW INSIGHTS FOR TOURISM

Ulf Sonntag
Managing Director

Institute for Tourism Research
in Northern Europe
Fleethörn 23
D-24103 Kiel
phone: +49 431 666 567 14
fax: +49 431 666 567 10
ulf.sonntag@nit-kiel.de

ANNEX: Segments and interview numbers

A	All respondents (population 18-75 yrs. in Europe; passport holders 18-75 yrs. in North America)	3,000	3,000	3,000	6,000 (2,000 each in DK, SE, NO)	3,500 (3,000 in US, 500 in CA)
B	Potential Greenland travellers (like to travel there next 5 years)	477	314	540	1,350	886
C	Potential plane travellers to Greenland, with a direct or stopover flight	344	225	423	1,163	686
D	Potential plane travellers to Greenland	378	264	470	1,220	805
E	Potential cruise travellers to Greenland	190	121	202	483	397