Positioning and potentials of Greenland on the FRENCH holiday travel market

Full report

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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 market report about the FRENCH market**.
- The results are based on 3,000 online interviews that were conducted in France in January 2023 by our partner DyVisit Greenland/Air Greenland. The results are representative for the population in France aged 18-75 years.

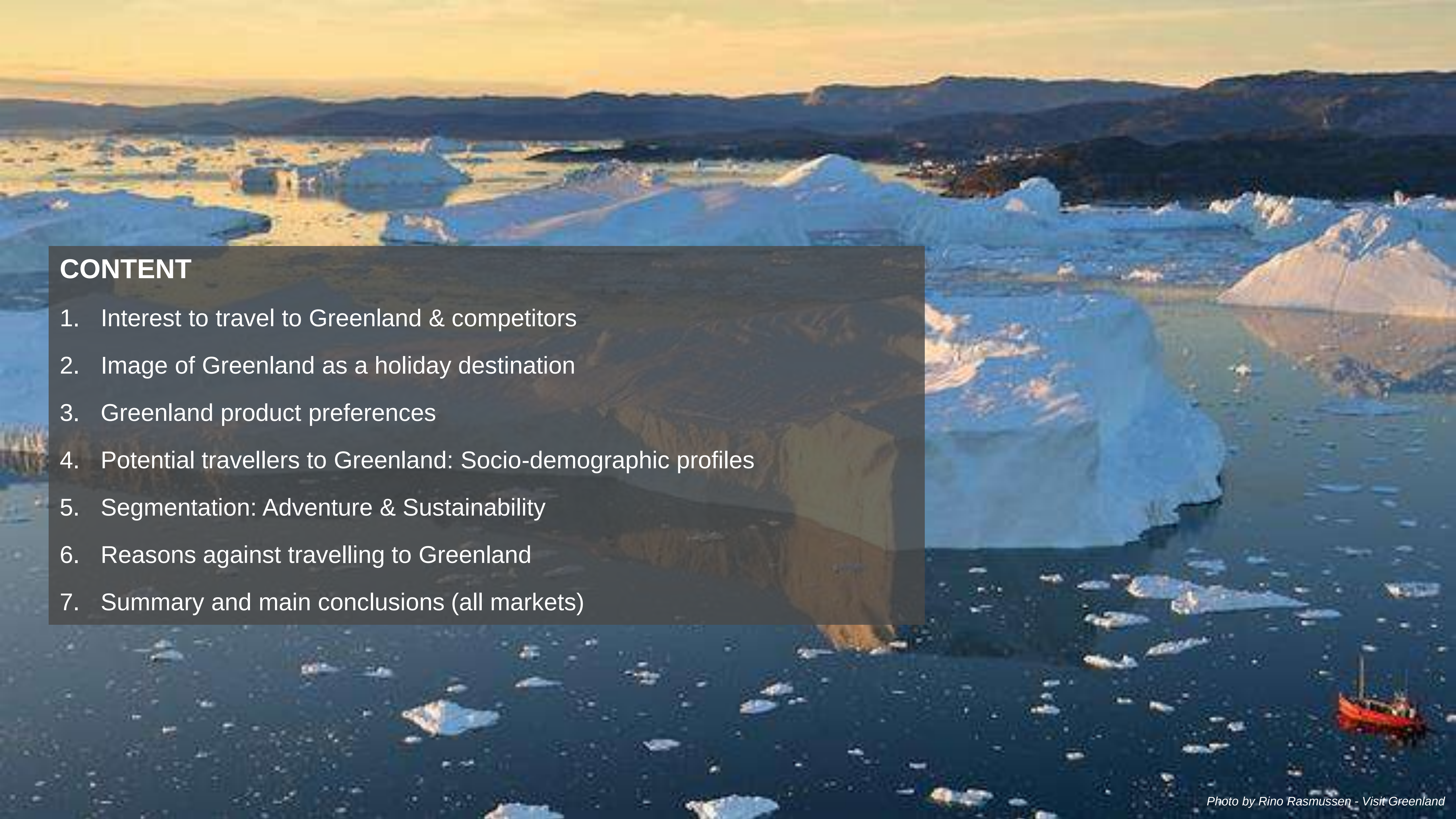

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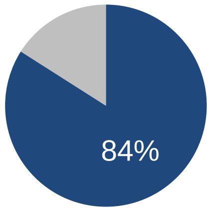
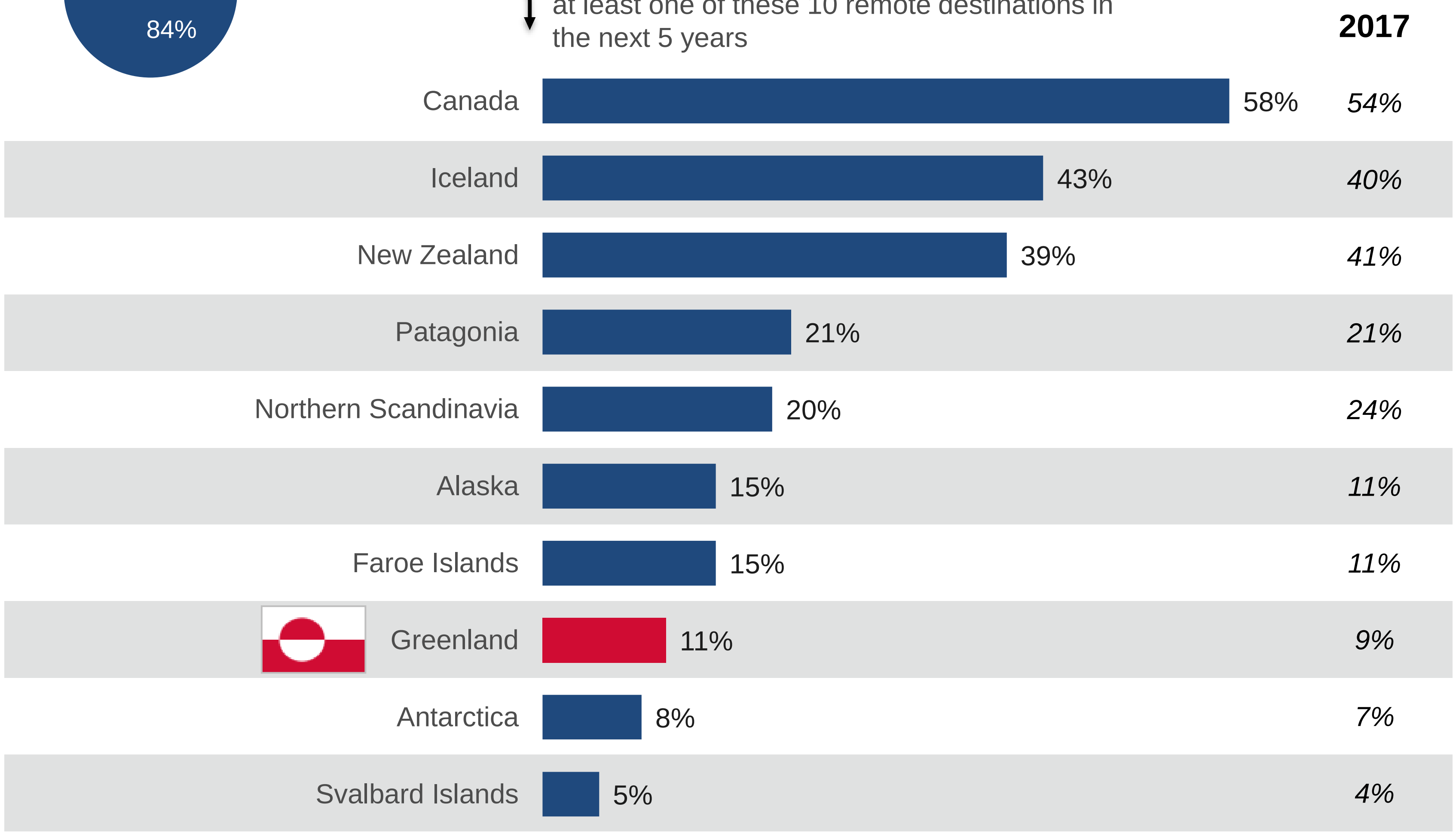
Photo by Rino Rasmussen - Visit Greenland

General interest to travel to remote destinations in the French population



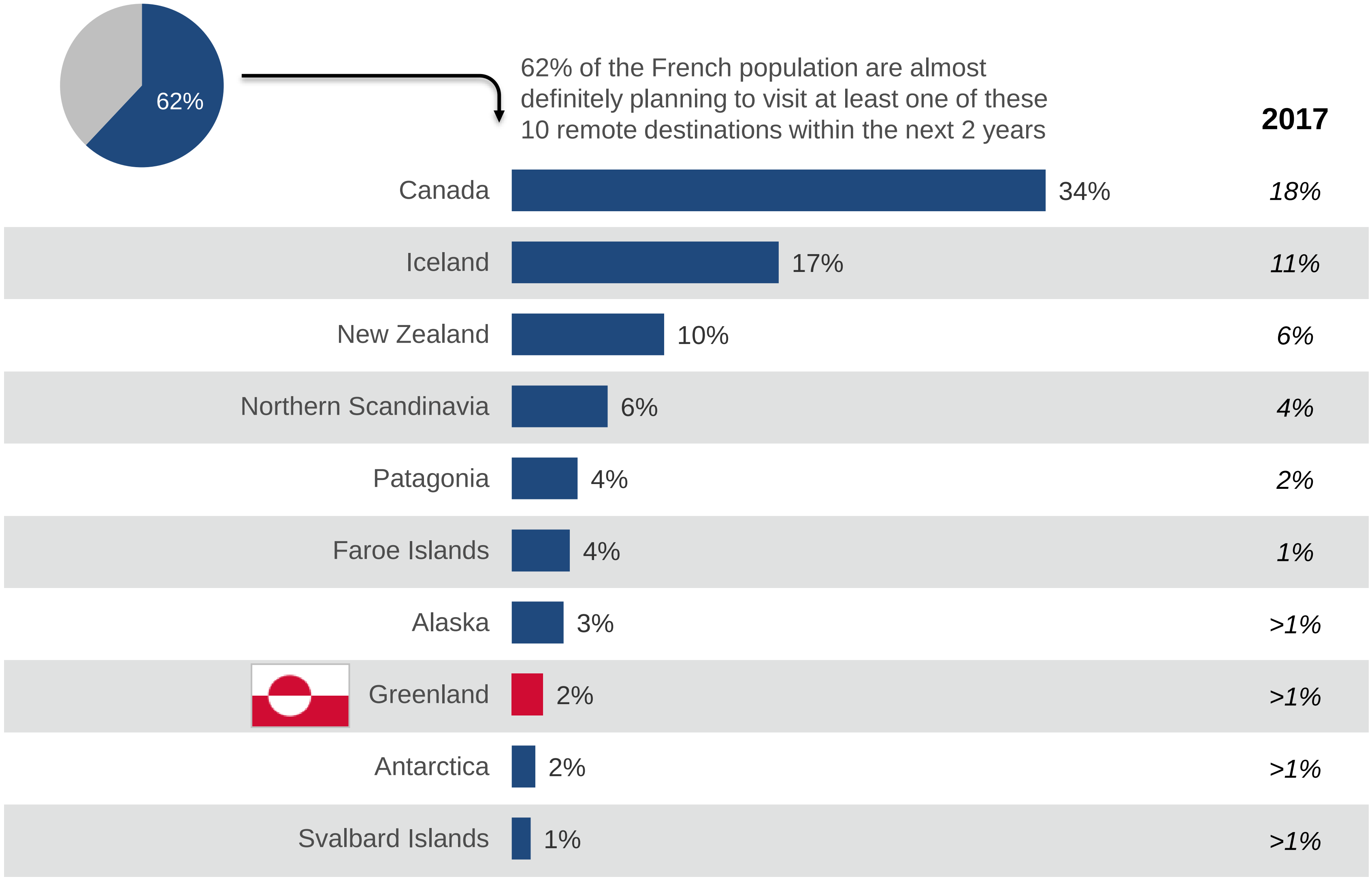
84% of the French population would like to go to at least one of these 10 remote destinations in the next 5 years



- To identify the "general" potential of Greenland and competitive remote destinations, we asked "*Which of these destinations would you like to visit within the next 5 years?"*
- 84% of the French population would like to go to at least one of these 10 remote destinations in the next 5 years.
- Canada is the most popular destination in terms of general interest, Iceland, New Zealand and Patagonia follow.
- 11% would like to go to Greenland.
- Compared to 2017, the shares of the surveyed countries increased. Interest to travel to Greenland increased by 2%-pts since 2017.

Which of these destinations would you like to visit within the next 5 years?
Basis: All respondents in France (n=3,000)
Source: Visit Greenland market study France 2023 by NIT, Visit Greenland/Air Greenland market study France 2017 by NIT

“Hard potential” to travel to remote destinations in the French population



62% of the French population are almost definitely planning to visit at least one of these 10 remote destinations within the next 2 years

- To identify the “hard” potential of Greenland and competitive remote destinations, and to put the general potential into perspective, we asked “*Which of these destinations are you almost definitely planning to visit within the next 2 years?”*
- 62% of the French population are almost definitely planning to visit least one of these 10 remote destinations within the next 2 years.
- Canada is the most popular destination in terms of this “hard potential”, followed by Iceland and New Zealand.
- 2% are almost definitely planning to visit Greenland within the next 2 years; more than in 2017.

And which of these travel destinations are you almost definitely planning to visit within the next 2 years?
Basis: All respondents in France (n=3,000)
Source: Visit Greenland market study France 2023 by NIT, Visit Greenland/Air Greenland market study France 2017 by NIT

Volume extrapolations of actual and potential travellers to Greenland in France total

FUNNEL	Definition	
total	French population 18-75 years old	47.3 million
total potential	“like to travel to Greenland within the next 5 years”	5.0 million
‘hard’ potential/planners	“almost definitely planning to visit Greenland within the next 2 years”	0.9 million
visitors	Plane and cruise passengers to Greenland in 2019	4,938 plane: 2,927 cruise: 2,011

- The volume funnel puts the reported market shares in relation to the actual market size and delivers concrete volume figures.
- In the population of 47 million French 18-75 years old, you find 5 million who are generally interested to travel to Greenland in the next 5 years.
- The hard potential of “almost definitely planning to visit Greenland within the next 2 years” represents almost 1 million persons.
- Comparing this with the actual pre-pandemic French arrivals in Greenland of 5,000 in 2019 shows that you only need to activate a small proportion of the potential travellers to achieve “good” numbers from this market.

Basis: All respondents in France (n=3,000)
Source: Visit Greenland market study France 2023 by NIT

Competition in France: Which other destinations are of interest for the potential travellers to Greenland?

Potential travellers to Greenland …	… would also like to visit within the next 5 years	… are almost definitely planning to visit within the next 2 years
Greenland	100%	19%
Canada	74%	43%
Iceland	71%	32%
New Zealand	58%	17%
Alaska	53%	13%
Northern Scandinavia	45%	15%
Patagonia	41%	10%
Antarctica	40%	7%
Faroe Islands	34%	9%
Svalbard Islands	18%	5%

- In France, potential travellers to Greenland are also interested in 4.3 other remote destinations in our question set.
- The fiercest competitors are by far Canada and Iceland. 74% and 71% of the potential Greenland travellers also want to go there.
- They are followed by New Zealand, Alaska and Northern Scandinavia
- 19% of the total potential Greenland travellers are almost definitely planning to visit Greenland in the next 2 years. Even more of them, 43%, are almost definitely planning to visit Canada in the next 2 years; 32% are almost definitely planning to visit Iceland in the next 2 years.

Basis: Potential travellers to Greenland in France (n=314)
Source: Visit Greenland market study France 2023 by NIT

To learn 1:
Interest to travel to Greenland & competitors

Interest to travel to remote destinations

- 84% of the French population would like to go to at least one of the 10 remote destinations covered in the questionnaire in the next 5 years. 62% are almost definitely planning to go to at least one of these destinations in the next 2 years.
- Canada is the most popular destination in terms of general interest, Iceland, New Zealand and Patagonia follow.
- Canada, Iceland and New Zealand are also the most popular destinations in terms of the “hard potential”.
- 11% of the French would generally like to go to Greenland and 2% are almost definitely planning to go there.
- Compared to 2017 the “general” potential as well as the “hard” potential of the surveyed countries has increased in most of the countries. Interest to travel to Greenland increased by 2%-pts since 2017.

Competitive situation in France

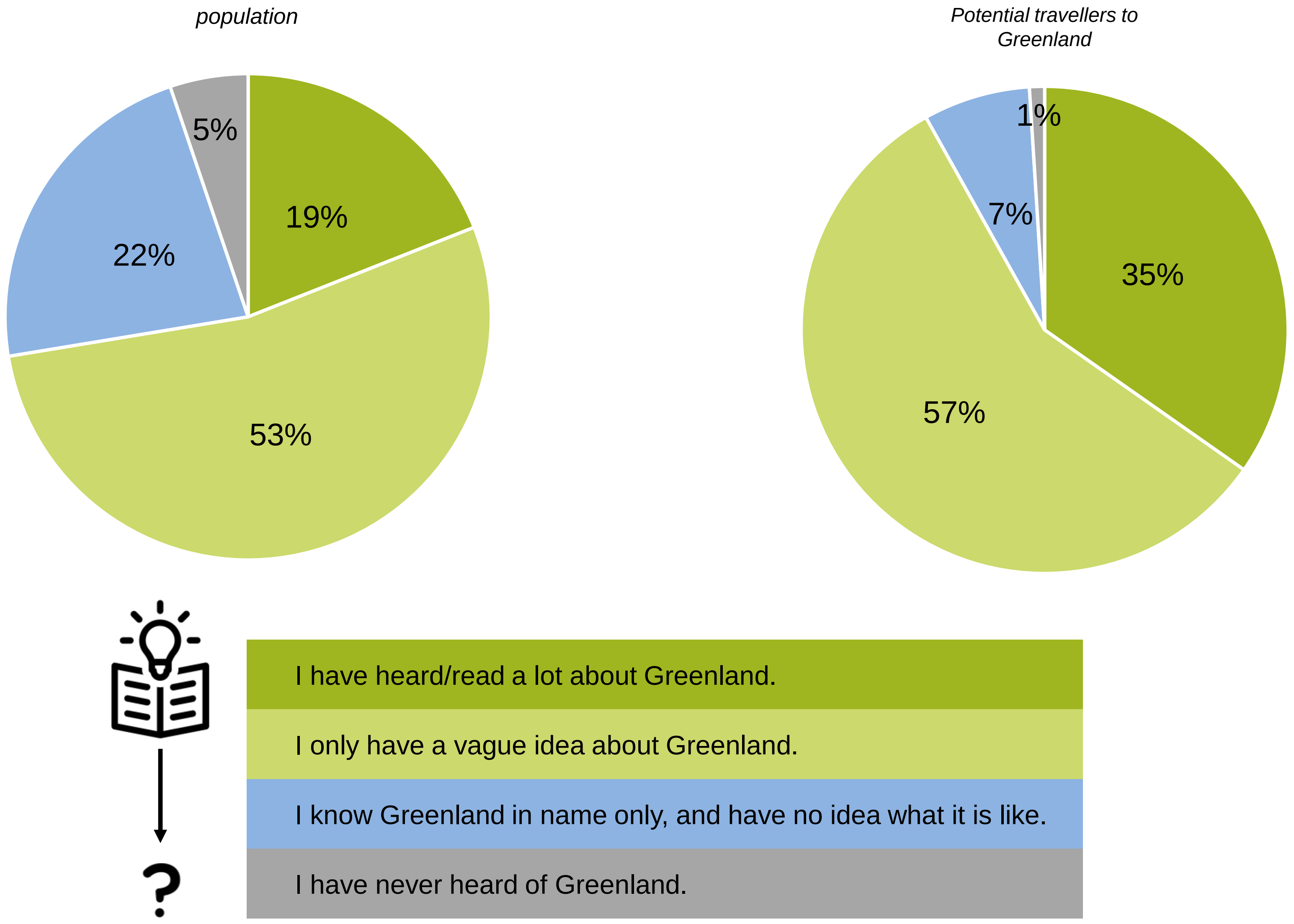
- A look at the competitive situation of Greenland shows that in France, potential travellers to Greenland are also interested in 4.3 other remote destinations in our question set.
- The fiercest competitor are by far Canada and Iceland. 74% of the potential Greenland travellers also want to go to Canada and 71% to Iceland. They are followed by New Zealand, Alaska and Northern Scandinavia.
- Looking further into the details, there is a high likelihood that within the next two years the potential Greenland travellers end up in Canada and to a lesser extent in Iceland before they actually travelling to Greenland.

- Compared with the actual demand, there is a interest to travel to Greenland in France. This is where destination marketing comes in. The following part of the report should help with strategic marketing decisions.
- When looking at the comparison over time and the development since 2017, it shows that the potential for all the survey countries has increased and the share of those French interested in going to Greenland within the next 5 years increased by 2%-pts. since 2017.
- The results also show that Greenland is in fierce competition with other (remote) destinations around the world.

2. Image of Greenland as a holiday destination

Photo by Mads Pihl - Visit Greenland

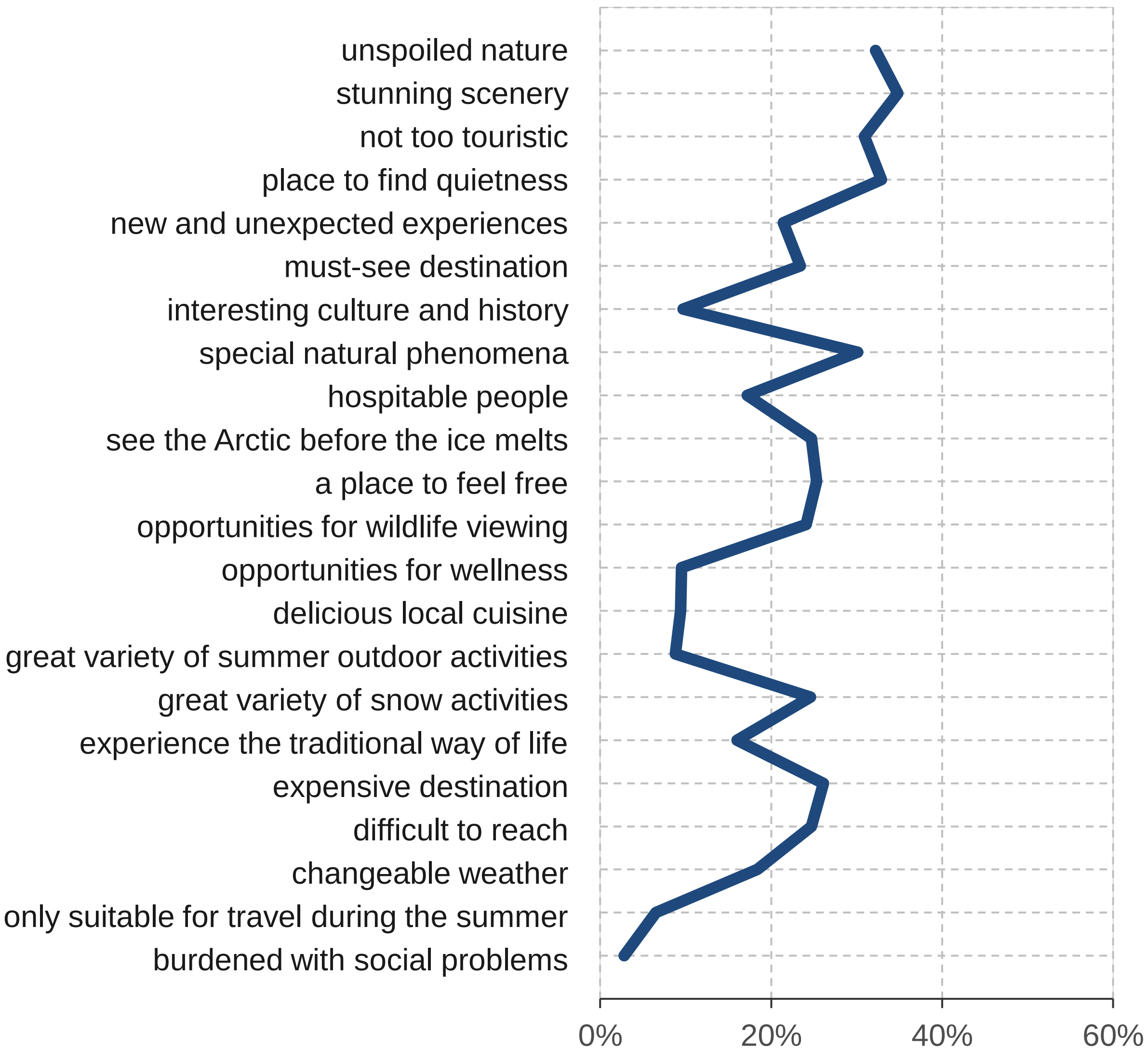
Knowledge of Greenland in the French population vs. potential travellers to Greenland



- Those French who have not been to Greenland before where asked about their knowledge of Greenland as a travel destination.
- 19% claim to have heard or read a lot about Greenland and can therefore be considered has having high knowledge about the country.
- More than half (53%) have only a vague idea of Greenland and more than a fifth (22%) knows the country only by name. A small minority of 5% has never heard of Greenland.
- Looking at the potential travellers to Greenland, the share of those knowing a lot about Greenland increases to 35% compared to the general population.

How well do you know Greenland as a travel destination?
Basis: Respondents, in France who have not been previously in Greenland (population: n=2,955; potential travellers: n=294)
Source: Visit Greenland market study France 2023 by NIT

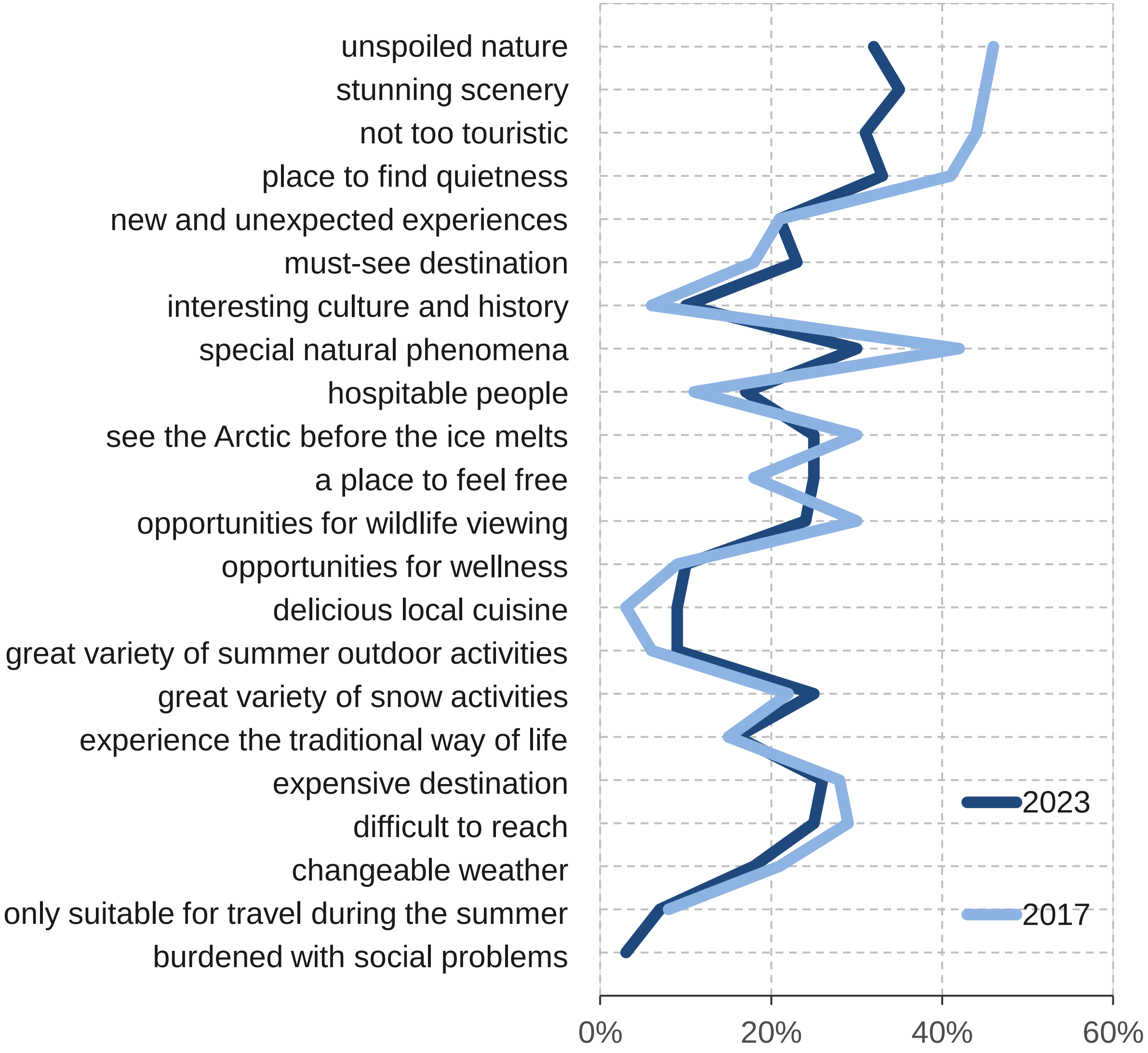
Image of Greenland in the French population



- The **key image factors** of Greenland in the French population are:
  - Stunning scenery (35%)
  - Quietness (33%)
  - Unspoiled nature (32%)
  - Not too touristic (31%)
  - Natural phenomena (30%)
- Greenland is **not famous** for:
  - Delicious local cuisine (9%)
  - Summer outdoor activities (9%)
  - Only suitable for travelling in the summer (7%)
  - Social problems (3%)
- Persons in France name on average 4.5 of the 21 characteristics in the question.

Please tell me which of these characteristics do you think particularly apply to Greenland?
Basis: All respondents in France (n=3,000)
Source: Visit Greenland market study France 2023 by NIT

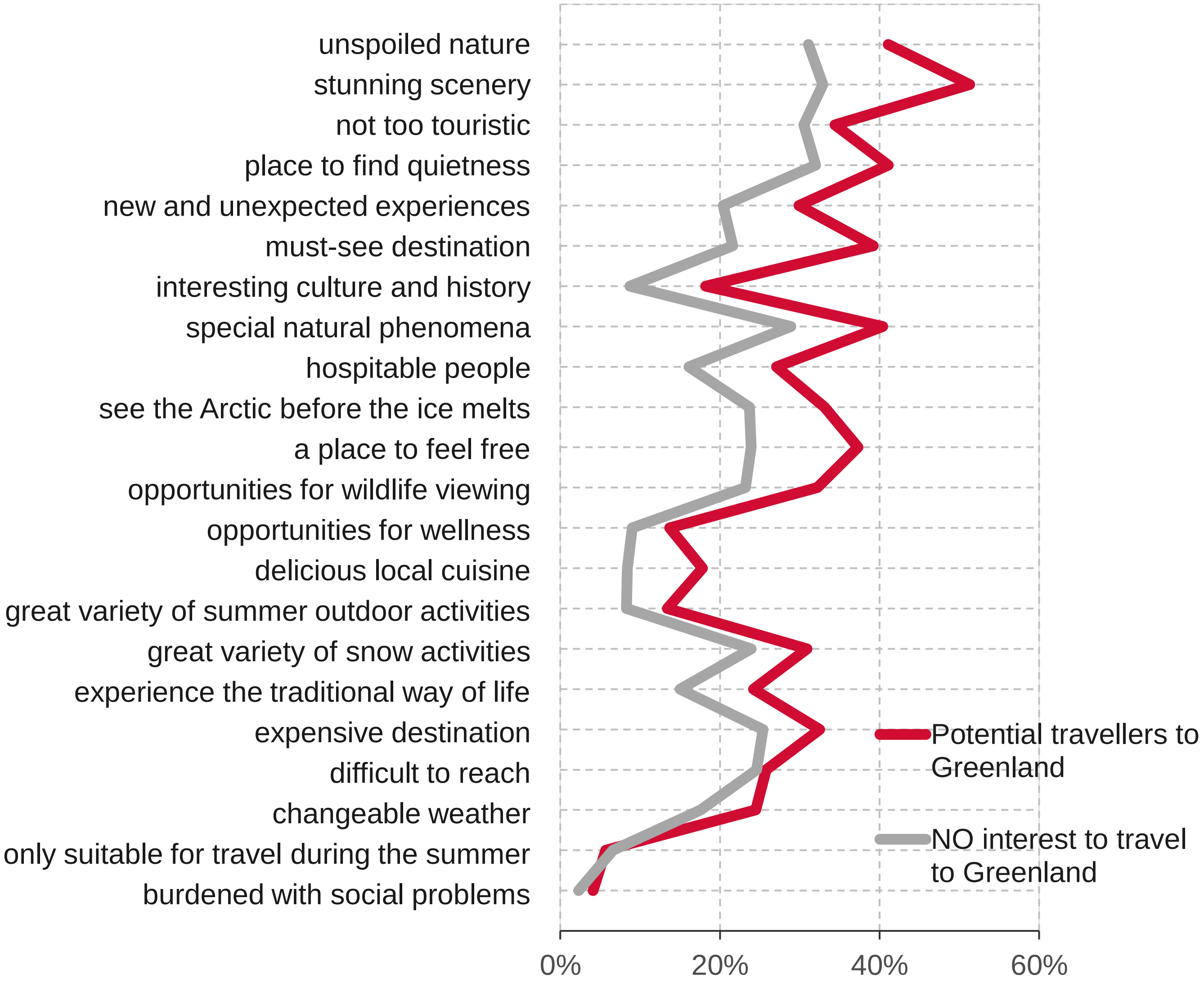
Image of Greenland in the French population 2017 and 2023



- The **most striking differences** of the image profiles of Greenland in the French population in 2023 and 2017 are:
  - Unspoiled nature (-14%-pts.)
  - Not too touristic (-13%-pts.)
  - Special natural phenomena (-12%-pts.)
  - Stunning scenery (-10%-pts.)
- Some characteristics, like “place to feel free”, “must-see destination” and “delicious local cuisine” receive higher values in 2023 than in 2017.

Please tell me which of these characteristics do you think particularly apply to Greenland?
Basis All respondents in France (n=3,000)
Source: Visit Greenland market study France 2023 by NIT, Visit Greenland/Air Greenland market study France 2017 by NIT

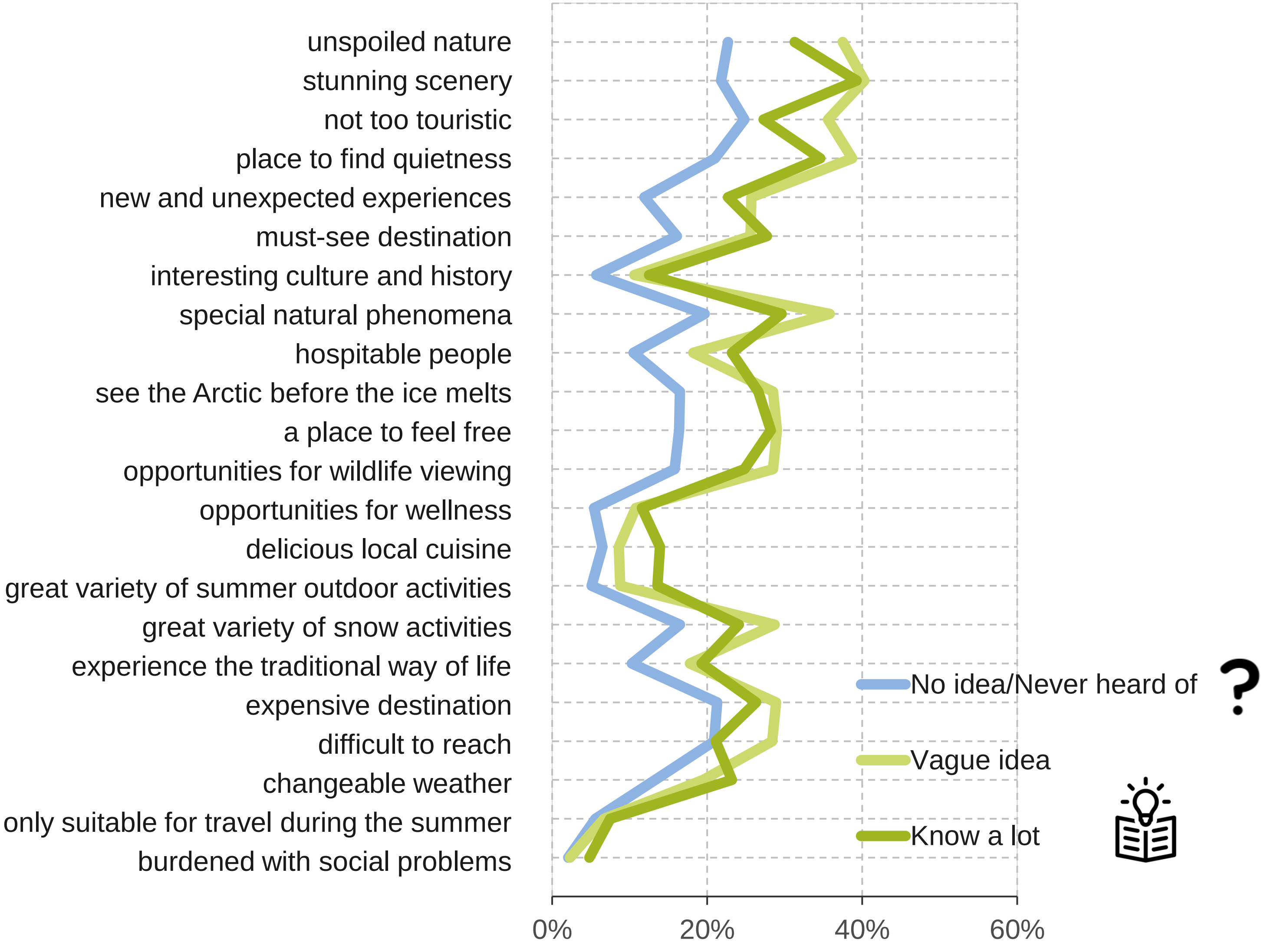
Image of Greenland in the French population: With/without interest to travel to Greenland



- The **most striking differences** of persons WITH interest to travel to Greenland compared to persons WITHOUT interest are:
  - Stunning scenery (+18%-pts.)
  - Must-see destination (+16%-pts.)
  - A place to feel free (13%-pts.)
  - Special natural phenomena (12%-pts.)
  - Hospitable people (11%-pts.)
  - Unspoiled nature (10%-pts.)
- There is only one characteristic, where persons with NO interest show higher figures: “only suitable for travel in the summer” (+1%-pts.).
- Persons WITH interest to travel to Greenland name on average 6.2 of the 21 characteristics in the question. Persons with NO interest name 4.3 characteristics.

Please tell me which of these characteristics do you think particularly apply to Greenland?
Basis: Respondents in France WITH interest to travel to Greenland (n=314) and WITHOUT interest to travel to Greenland (n=2,686)
Source: Visit Greenland market study France 2023 by NIT

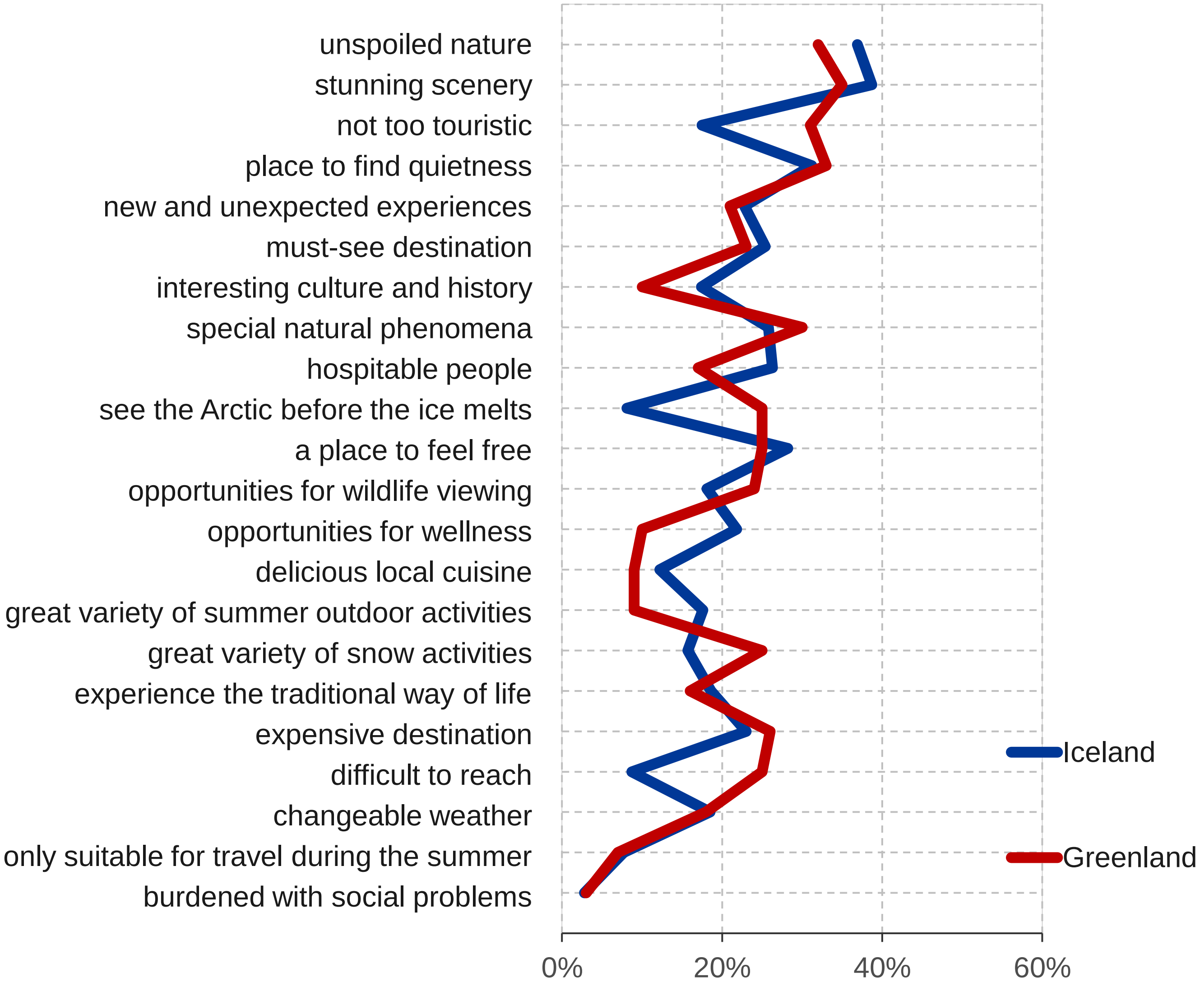
Image of Greenland in the French population: Depending on the knowledge of Greenland



- Higher knowledge leads to higher image figures at these factors when comparing persons who know a lot about Greenland and persons who have no idea what Greenland is like:
  - Stunning scenery (+18%-pts.)
  - Quietness (+14%-pts.)
  - Hospitable people (+13%-pts.)
  - A place to feel free (+12%-pts.)
  - Must-see destination (+12%-pts.)
  - The groups are closer to each other regarding aspects such as Greenland being difficult to reach, suitable only for summer, not too touristic, and having social problems.
- Persons WITH knowledge name on average 4.9 of the 21 characteristics in the question. Persons with a vague idea name 5.2 and those with NO knowledge only name 3.1 characteristics.

Please tell me which of these characteristics do you think particularly apply to Greenland?
Basis: All respondents in France with knowledge (n=560), a vague idea (n=1,577) and with no idea and never heard of Greenland (n=818) of Greenland
Source: Visit Greenland market study France 2023 by NIT

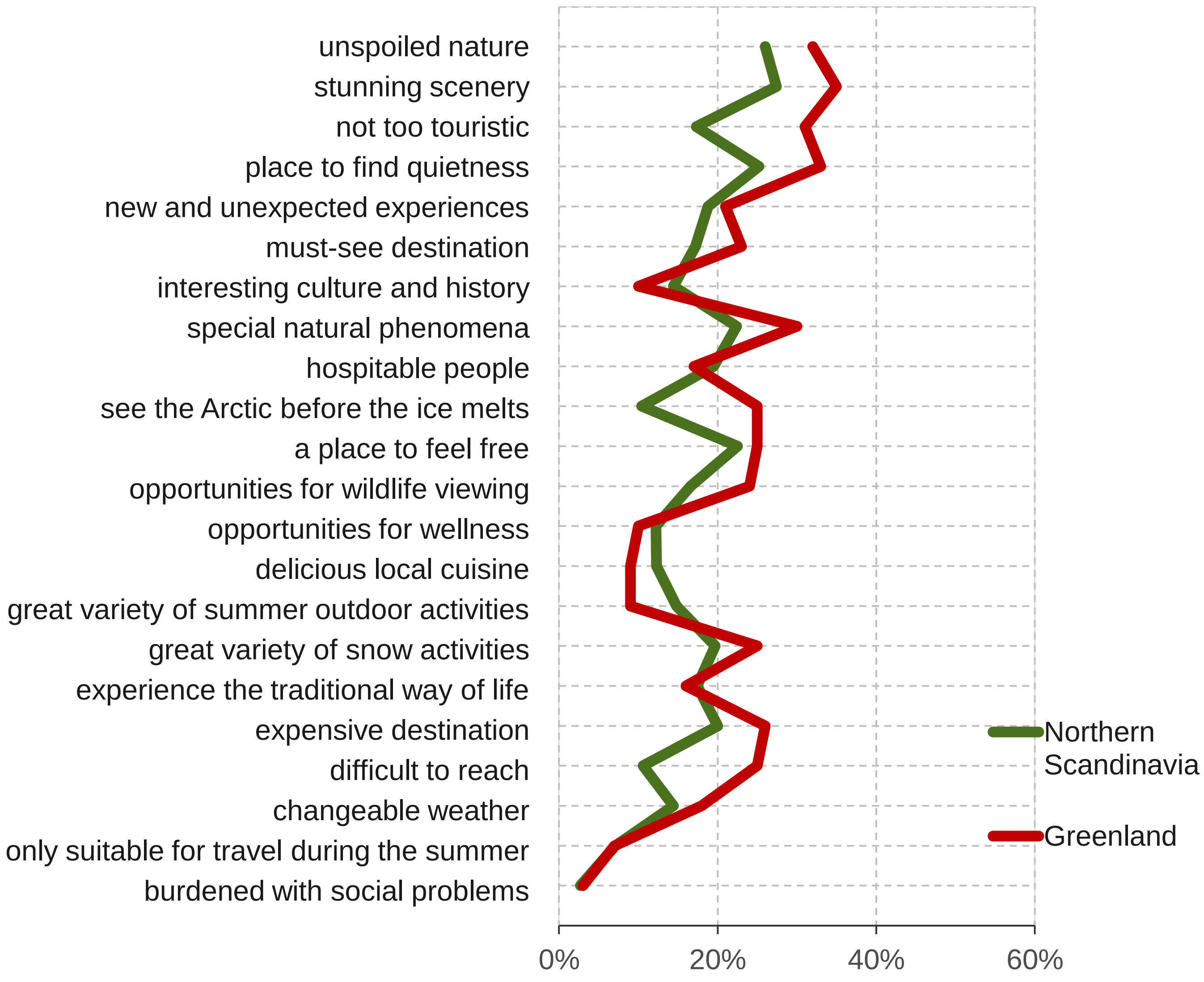
Image of Greenland and Iceland on the French market



- In addition to the image of Greenland, the questionnaire also asked for the image of Iceland and Northern Scandinavia.
- Comparing the images of Greenland and Iceland, we can observe the top characteristic being the same: “Stunning scenery”
- **More characteristic for Greenland** than for Iceland:
  - See the Arctic now (+17%-pts.)
  - Difficult to reach (+16%-pts.)
  - Not too touristic (+14%-pts.)
- **More characteristic for Iceland** than for Greenland:
  - Wellness (+12%-pts.)
  - Hospitable people (+9%-pts.)
  - Summer outdoor activities (+9%-pts.)

Please tell me which of these characteristics do you think particularly apply to Greenland?
Basis: All respondents in France (n=3,000)
Source: Visit Greenland market study France 2023 by NIT

Image of Greenland and Northern Scandinavia on the French market



- In addition to the image of Greenland, the questionnaire also asked for the image of Iceland and Northern Scandinavia.
- Comparing the images of Greenland and Northern Scandinavia, we can observe the top characteristic being the same: “Stunning scenery”.
- **More characteristic for Greenland** than for Northern Scandinavia:
  - See the Arctic now (+15%-pts.)
  - Not too touristic (+14%-pts.)
  - Difficult to reach (+14%-pts.)
- **More characteristic for Northern Scandinavia** than for Greenland:
  - Summer outdoor activities (+6%-pts.)
  - Culture and history (+4%-pts.)
  - Delicious local cuisine (+3%-pts.)

Please tell me which of these charcteristics do you think particularly apply to Greenland?
Basis: All respondents in France (n=3,000)
Source: Visit Greenland market study France 2023 by NIT

To learn 2:
Image of Greenland on the French market

Knowledge of Greenland in France

- 19% of the population heard or read a lot about Greenland, 53% have only a vague idea and 22% knows the country only by name. A small minority of 5% has never heard of Greenland. For the potential travellers to Greenland, the share of those knowing a lot about Greenland increases to 35% compared to the general population.

Image Greenland in France:

- The key image factors of Greenland in the French population are: Stunning scenery, a place to fiend quietness, unspoiled nature, not too touristic and natural phenomena.
- Greenland is not famous for its delicious local cuisine, summer outdoor activities, being only suitable for travelling in the summer and being burdened with social problems.
- Persons in France name on average 4.5 of the 21 characteristics in the question.
- Persons WITH interest to travel to Greenland consider it much more to have a stunning scenery, to be a must-see destination, a place to feel free, to have a special natural phenomena, hospitable people and unspoiled nature. Persons with interest to travel to Greenland name on average 6.2 of the 21 characteristics in the question. Persons with NO interest name 4.3 characteristics.
- Comparing the image depending on the knowledge of Greenland, higher knowledge leads to higher image figures of factors like stunning scenery, a place to find quietness, hospitable people, a place to feel free and must-see destination. Persons WITH knowledge name on average 4.9 of the 21 characteristics in the question while those with NO knowledge only name 3.1 characteristics.

Image benchmarking in France: Greenland and competitors

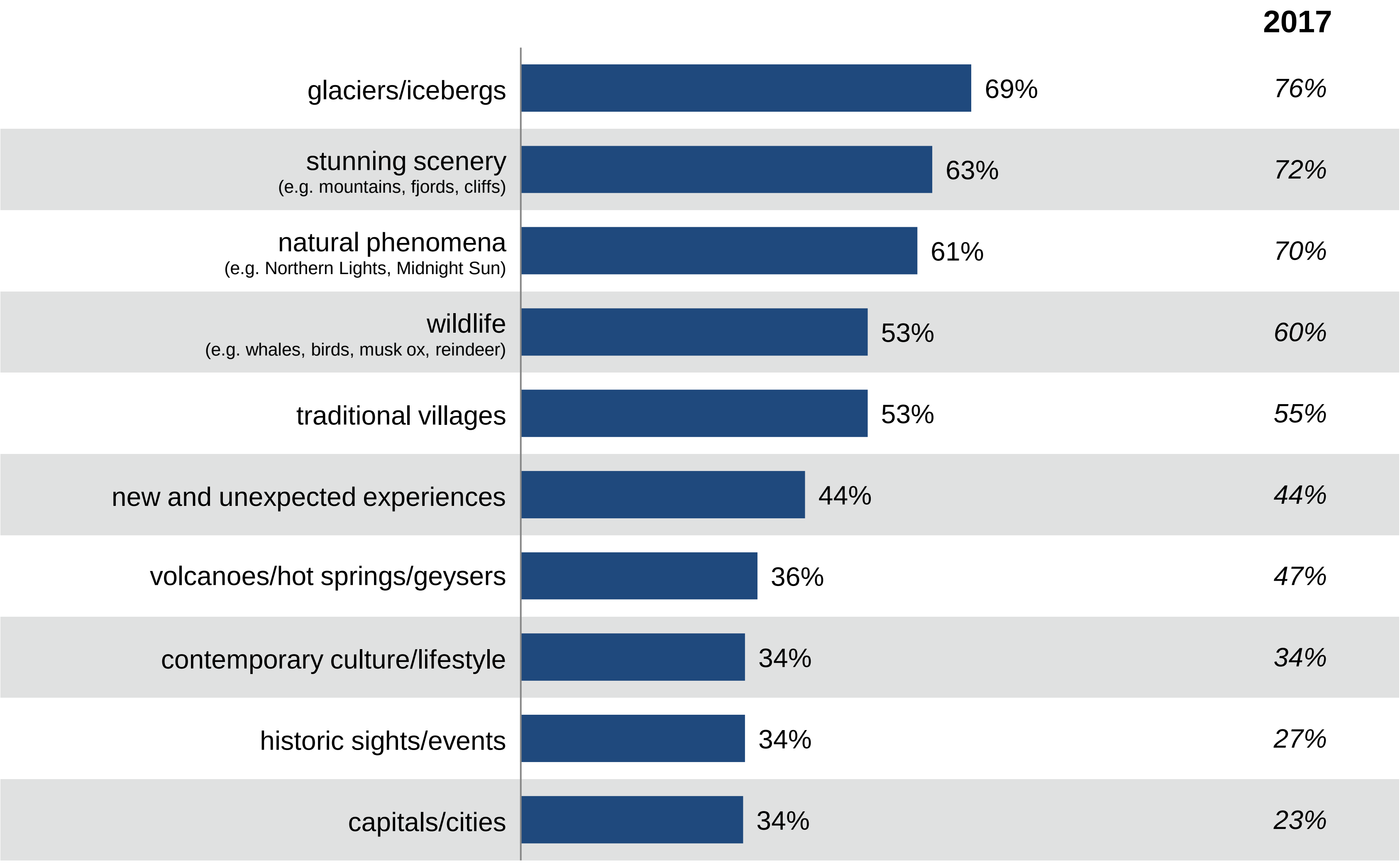
- When benchmarking the images of Greenland and its main competitors Iceland and Northern Scandinavia, we find that stunning scenery, unspoiled nature and natural phenomena are important image factors in all those destinations.
- Greenland is sticking out over its two competitors regarding the following image characteristics: Seeing the Arctic now, not too touristic and difficult to reach.
- The other destinations are sticking out over Greenland regarding the following characteristics …
    - Iceland: Wellness, hospitable people and summer outdoor activities
    - Northern Scandinavia: Summer outdoor activities, culture & history and delicious local cuisine.

- The results about the image of Greenland in France give you a clear picture of how Greenland is perceived as a holiday destination in this market. They also clearly show what potential travellers expect and what not.
- This together with the benchmarking with Iceland and Norther Scandinavia, gives you first indications about the strengths and weaknesses of Greenland from the travellers’ point of view. This can already give you important clues for planning a market specific marketing and communication strategy.

3. Greenland product preferences

Photo by Mads Pihl - Visit Greenland

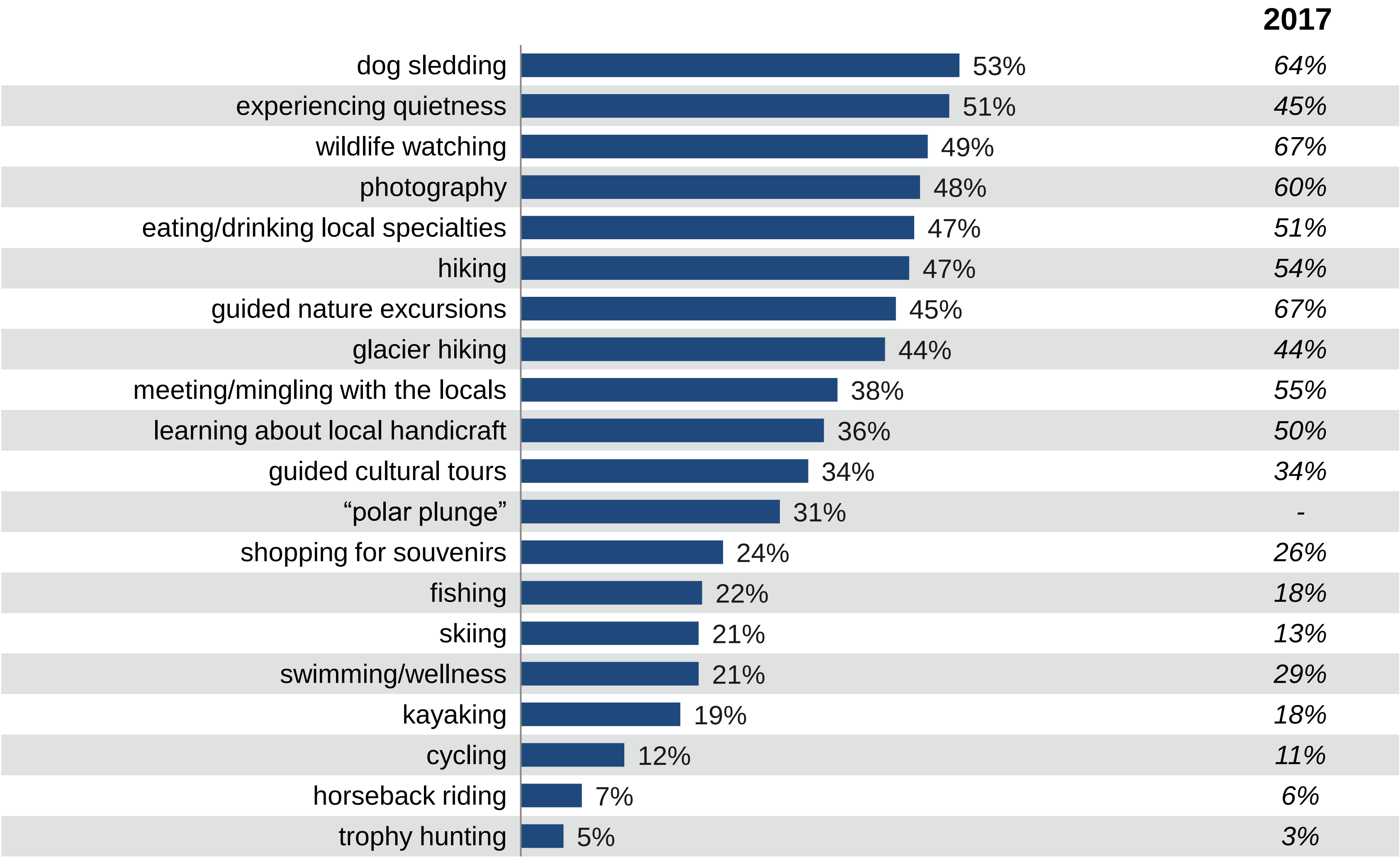
Potential travellers to Greenland: Preferred holiday experiences in Greenland



- For potential Greenland travellers in France it is most important to experience the glaciers/icebergs, stunning scenery, natural phenomena and the wildlife.
- Cities and historic sights/events are at the bottom of the ranking – but with figures of still around 30%.
- On average 4.8 of the 10 aspects are of interest for potential Greenland travellers in France.
- Compared to 2017 the ranking of the experiences stayed more or less the same, nevertheless figures for nature-oriented experiences decreased (while still dominating) and culture-oriented experiences increased or stayed stable (while remaining at the bottom of the ranking).

When thinking about travelling to Greenland what would you like to see/experience?
Basis: Potential travellers to Greenland from France (n=314)
Source: Visit Greenland market study France 2023 by NIT, Visit Greenland/Air Greenland market study France 2017 by NIT

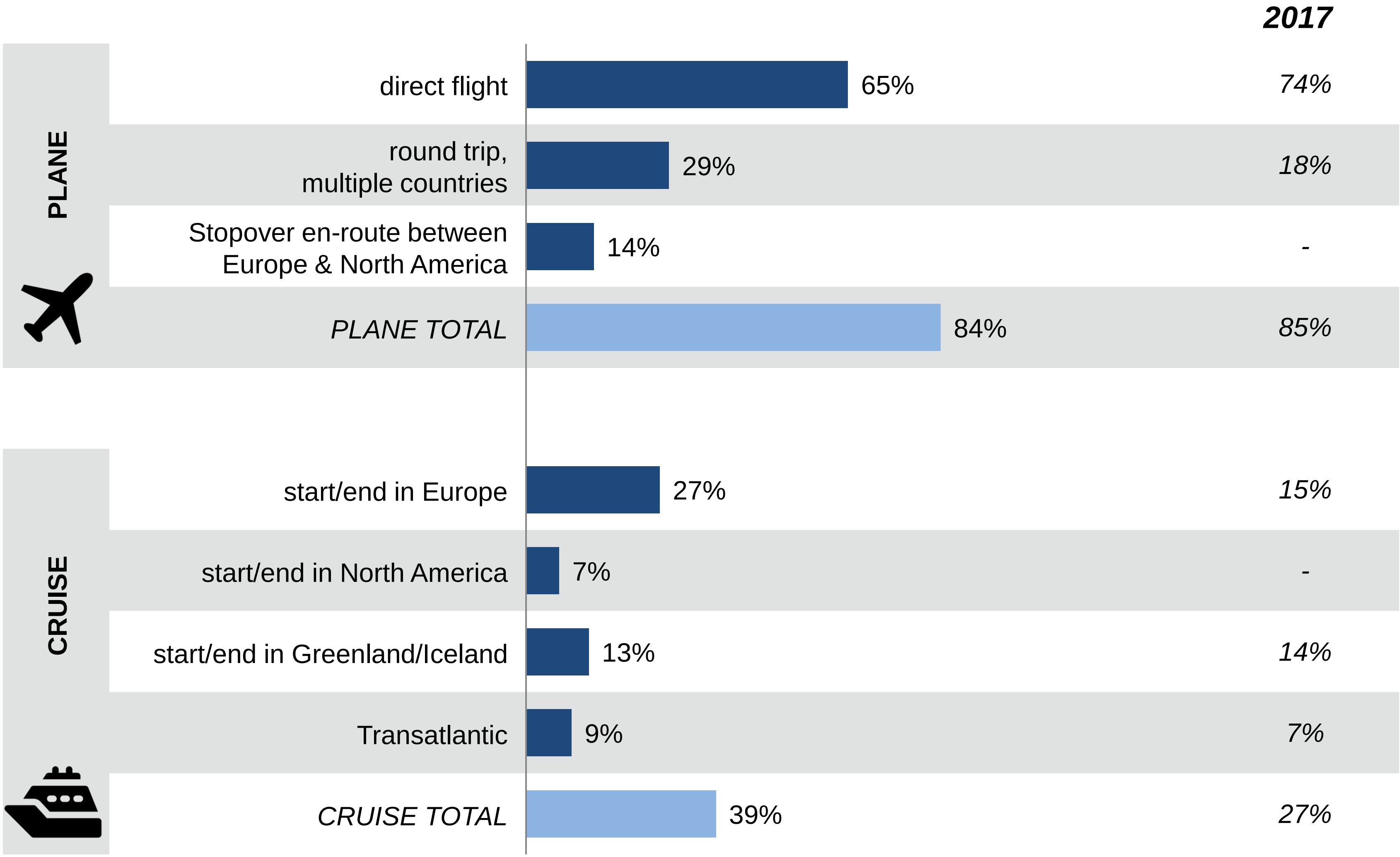
Potential travellers to Greenland: Preferred holiday activities in Greenland



- The most sought-after activities in Greenland by potential travellers from France are dog-sledding, experiencing quietness, wildlife watching and photography.
- Potential travellers from France named on average 6.2 activities as interesting to them, while the potential traveller of 2017 named on average 7.3 activities.
- Compared to 2017 this means quite a change of the ranking. Guided nature excursions and wildlife watching became less important and experiencing quietness and dog sledding (despite decreases in the figures) stepped up in the ranking.
- Figures for “niche” activities such as fishing, skiing, kayaking etc. went slightly up or remained stable.

Which of the following activities would you like to do when travelling to Greenland?
Basis: Potential travellers to Greenland from France (n=314)
Source: Visit Greenland market study France 2023 by NIT, Visit Greenland/Air Greenland market study France 2017 by NIT

Potential travellers to Greenland: Preferences about getting to Greenland

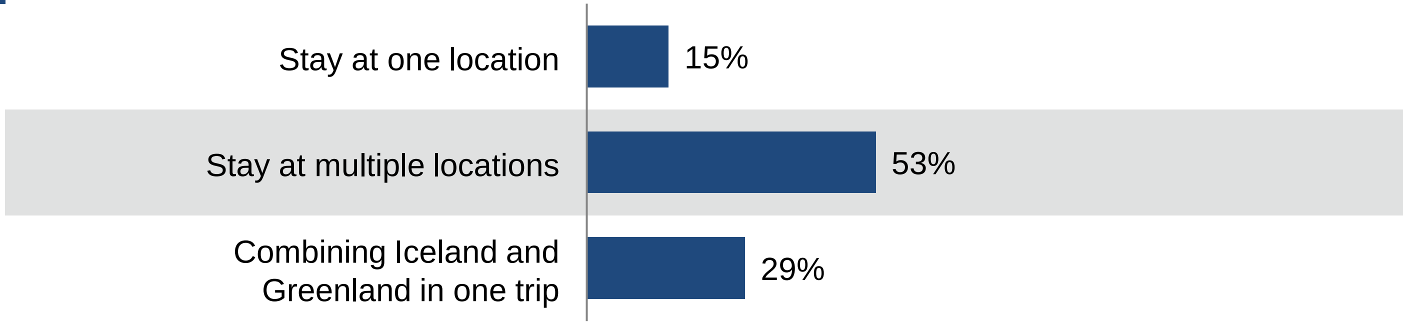


- In total, 84% of the potential guests in France would prefer the **plane** to travel to Greenland
- In detail, 65% prefer direct flights to Greenland; 29% want to visit Greenland during a multi country air trip and 14% as a stop between Europe and North America.
- Compared to 2017 fewer people prefer direct flights while the proportion of those interested in a round trip with multiple countries has increased by 11%-pts.
- 39% of the potential guests in France would like to visit Greenland on a **cruise**.
- In detail, 27% prefer the start/end to be in Europe, 13% would like it to start/end in Greenland/Iceland.
- Comparison to 2017, this means more interest for cruises from/to European ports.

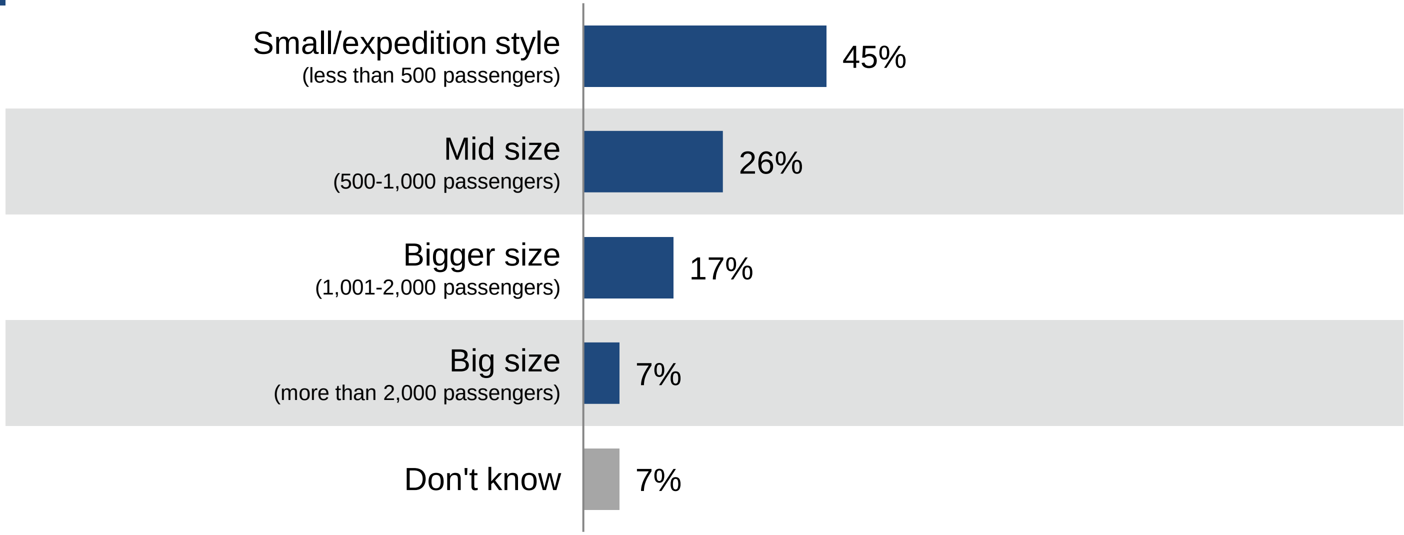
How would you like to travel to Greenland?
Basis: Potential travellers to Greenland from France (n=314)
Source: Visit Greenland market study France 2023 by NIT, Visit Greenland/Air Greenland market study France 2017 by NIT

Potential travellers to Greenland:
How to travel by plane/cruise ship to Greenland

Travel by plane



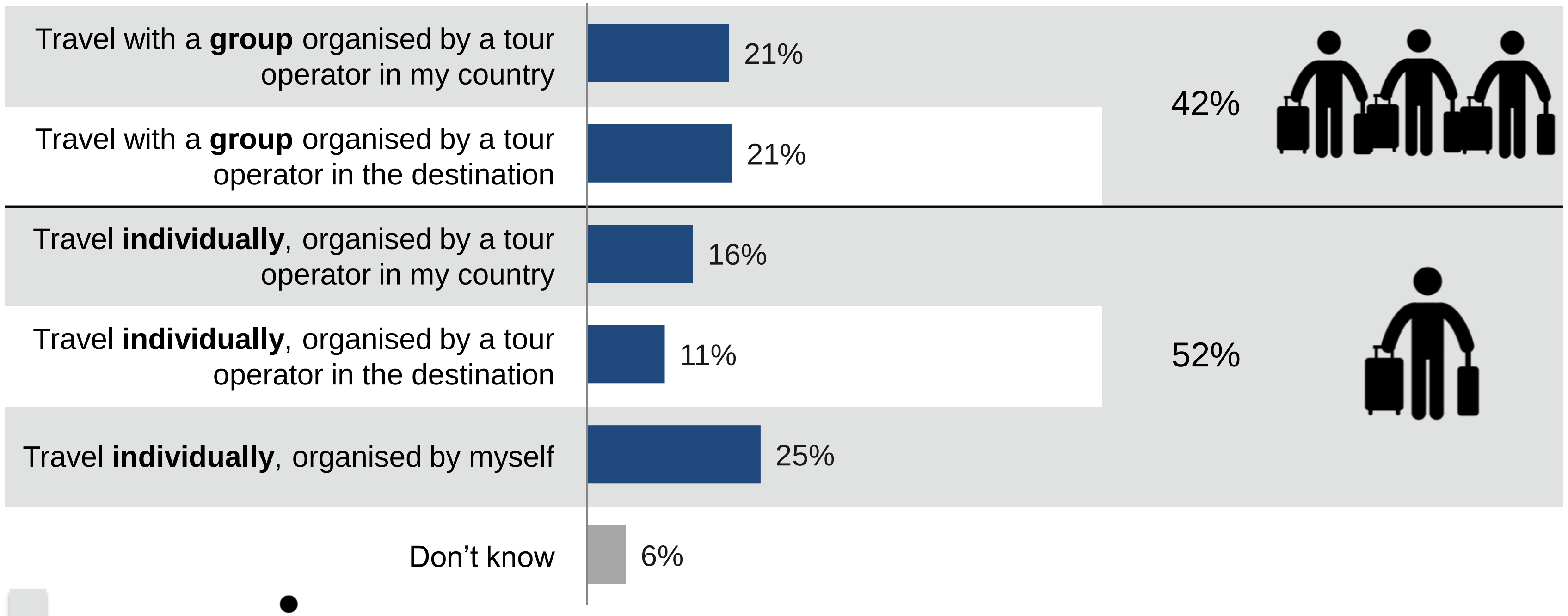
Travel by cruise

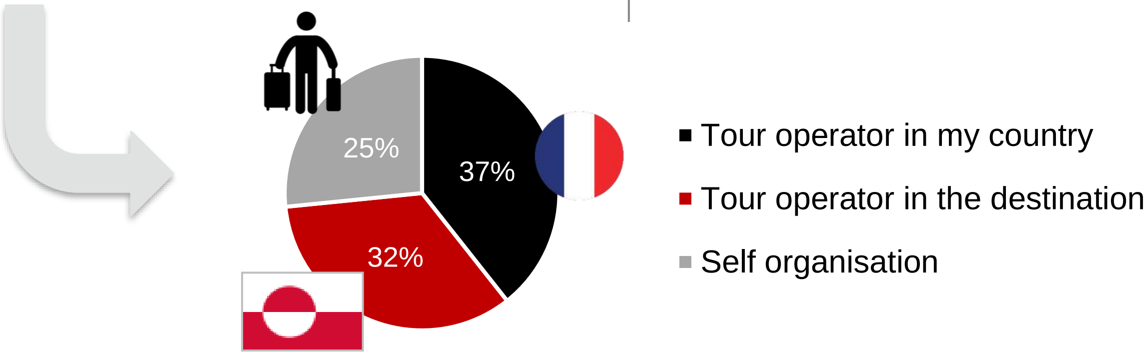


- Among the potential **plane** travellers (direct or with stop over), 53% prefer visiting multiple locations while in Greenland. 29% can imagine combining Iceland and Greenland in one trip and 15% would like to stay at one location in Greenland.
- Among the potential **cruise** travellers, the biggest group (45%) prefers a small/expedition style sized ship with less than 500 passengers and 26% prefer an mid size ship with 500-1,000 passengers. Only 17% are interested in a bigger sized ship with up to 2,000 passengers and only minority of 7% would like to have a big sized ship with more than 2,000 passengers.

Plane preferences: How would you like to experience your stay in Greenland? Cruise preferences: What kind of ship would you prefer for a cruise to Greenland?
Basis: Potential travellers to Greenland from France that prefer going to Greenland by plane with direct flight or stop over (n=225) and by cruise (n=121)
Source: Visit Greenland market study France 2023 by NIT

Potential travellers to Greenland: Preferences about travel organisation to Greenland

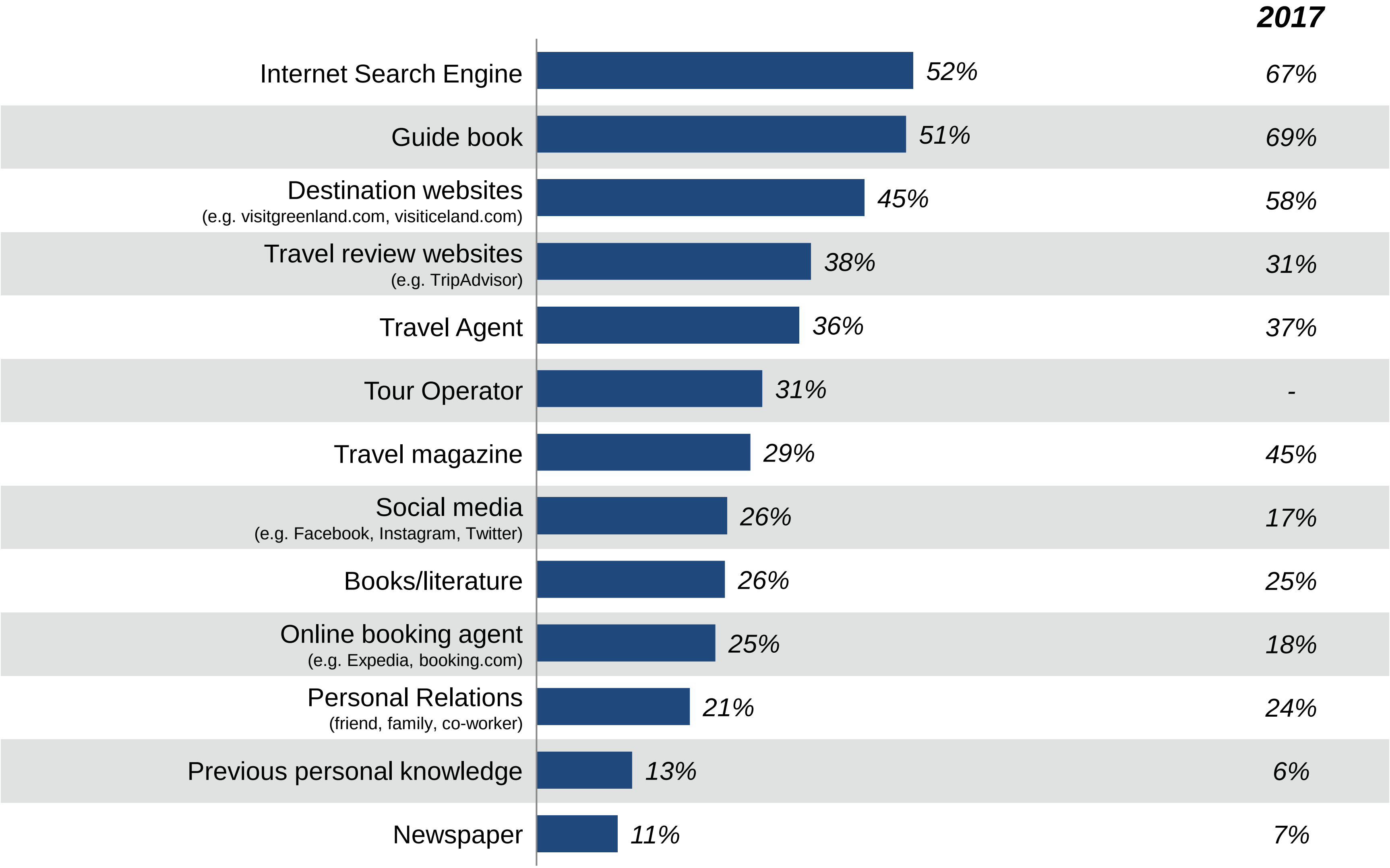




- Among the potential **plane** travellers, the majority prefers to travel individually (52%), either organised by a tour operator from France (16%) or from Greenland (11%) or by themselves (25%).
- 42% prefer travelling with a group.
- Overall, 37% of French plane travellers prefer the organisation of their Greenland trip by an operator from France, 32% by an operator from Greenland.

How would you like to organize your trip to Greenland?
Basis: Potential travellers to Greenland from France that prefer going by plane (n=264)
Source: Visit Greenland market study France 2023 by NIT

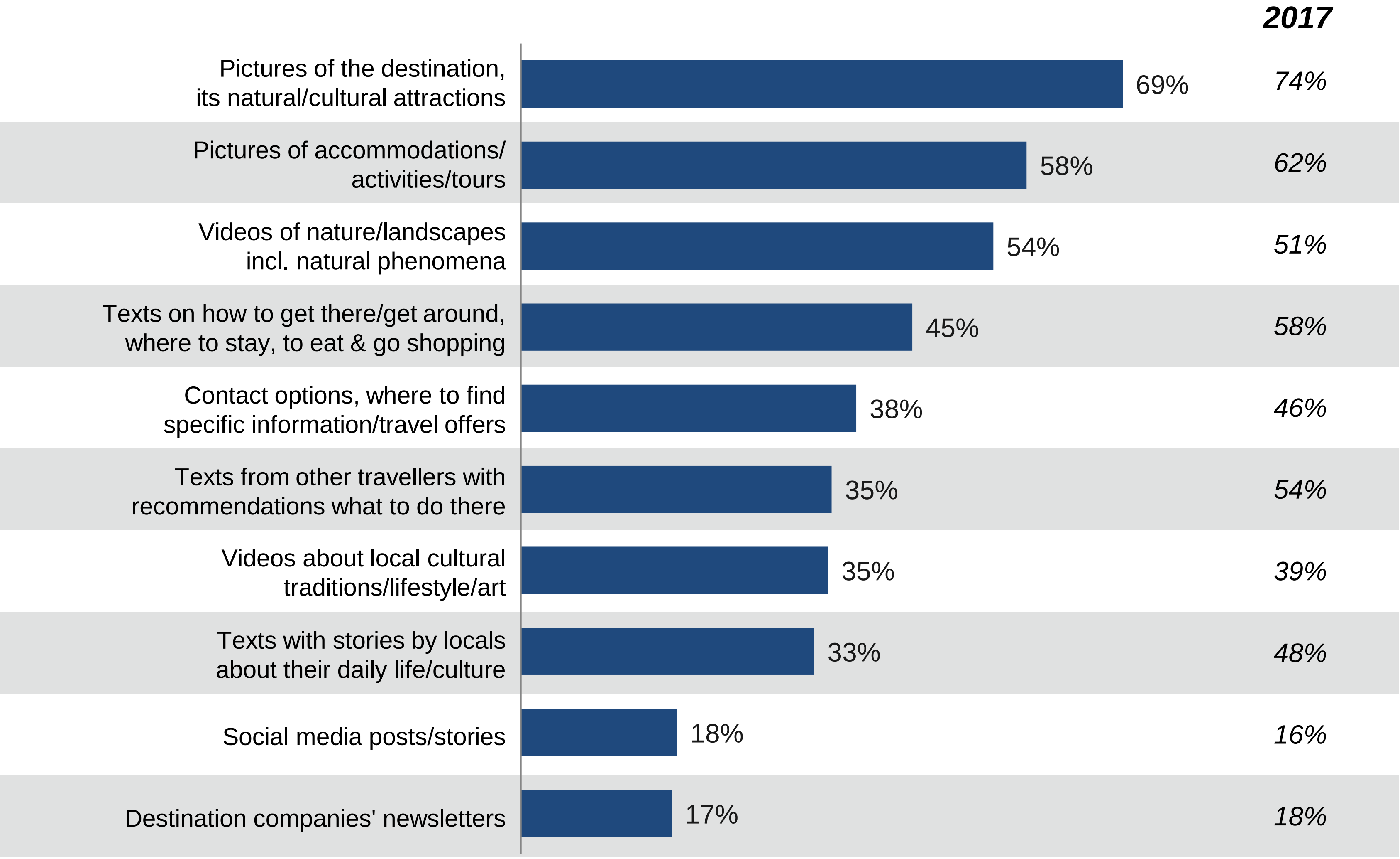
Potential travellers to Greenland: Preferred sources for inspiration & information



- » The most popular sources for information and inspiration of potential travellers in France when planning a trip to Greenland are internet search engines (52%) and guide books (51%).
- » These are followed by destination websites (45%), travel review websites (38%), travel agent (36%) and tour operator (31%).
- » Compared to 2017 social media (+9%-pts.), OTAs and personal knowledge (+7%-pts. each) became more relevant for the search of inspiration and information. While classic offline sources, such as guide books (-18%-pts.) and travel magazines (-16%-pts.) became less relevant. Despite still being at the top 3, the figure for internet search engines and destination websites also dropped significantly (by 15%-pts. and 13%-pts.)

When thinking about travelling to Greenland how would you like to look for inspiration/information for this trip?
Basis: Potential travellers to Greenland from France (n=314)
Source: Visit Greenland market study France 2023 by NIT, Visit Greenland/Air Greenland market study France 2017 by NIT

Potential travellers to Greenland: Preferred kind of online content

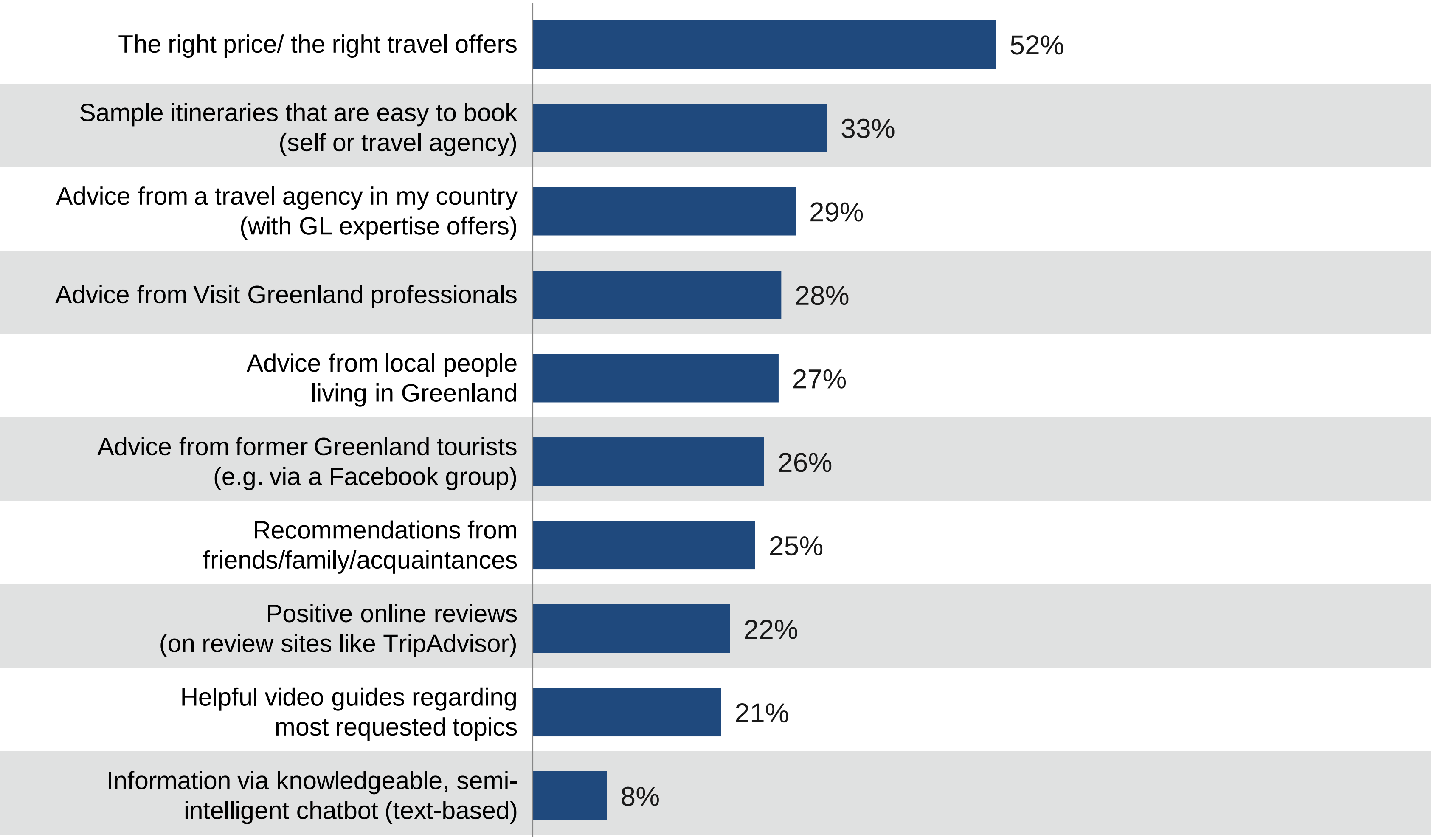


		2017
Pictures of the destination, its natural/cultural attractions	69%	*74%*
Pictures of accommodations/ activities/tours	58%	*62%*
Videos of nature/landscapes incl. natural phenomena	54%	*51%*
Texts on how to get there/get around, where to stay, to eat & go shopping	45%	*58%*
Contact options, where to find specific information/travel offers	38%	*46%*
Texts from other travellers with recommendations what to do there	35%	*54%*
Videos about local cultural traditions/lifestyle/art	35%	*39%*
Texts with stories by locals about their daily life/culture	33%	*48%*
Social media posts/stories	18%	*16%*
Destination companies' newsletters	17%	*18%*

- » When asked for their preferred kind of online content, most potential Greenland guests in France favour destination & accommodation images or nature videos ahead of factual texts on the travel product.
- » These seem to be basic prerequisites that every travel website should offer.
- » Only a minority is interested in destination newsletters or social media posts.
- » However, compared to results in 2017 all kinds of texts seem much less attractive for the potential travellers; social media information as well as videos of the nature became slightly more important (+2%-pts. and +3%-pts.).

Which kind of content do you like to find when looking for online information about Greenland?
Basis: Potential travellers to Greenland from France (n=314)
Source: Visit Greenland market study France 2023 by NIT, Visit Greenland/Air Greenland market study France 2017 by NIT

Potential travellers to Greenland: Final decisive input to book a trip to Greenland

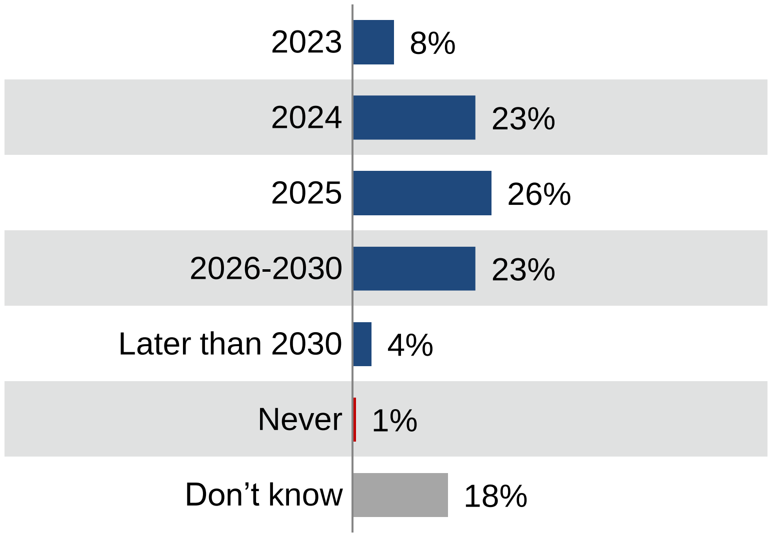


- » This question was added to find out more about the very last step within the travel decision process; the results show the clear dominance to find the "right" product with the "right" price.
- » Following, but on a lower level of approval, are sample itineraries, advice from a travel agency in France, and advice from Visit Greenland professionals as well as advice from locals and advice from former Greenland tourists.

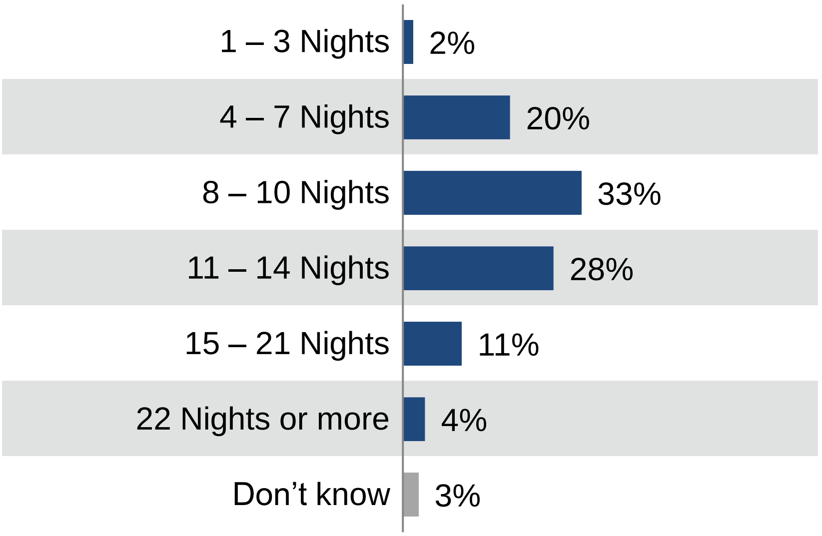
You have indicated that you would like to visit Greenland within the next 5 years. Please now imagine yourself being in a situation where you're almost ready to book, but still need the final decisive input. What kind of input would be most relevant for you?
Basis: Potential travellers to Greenland from France (n=314)
Source: Visit Greenland market study France 2023 by NIT

Potential travellers to Greenland:
Potential time of travel, duration and preferred months

Visit (next time)



Duration

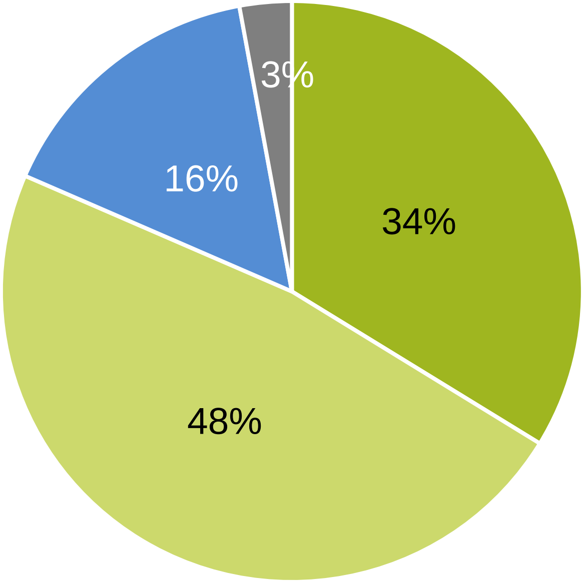


Preferred months

- The survey also asked details about the **year** when the trip to Greenland is likely to come true: 8% of the potential travellers in France plan on visiting Greenland this year (2023), 24% in 2024, 26% in 2025 and 23% in 2026 or later.
- When asked about **how much time** they would like to spend in Greenland 61% of the travellers want to spent between one and two weeks, only 22% one week and less and the rest (15%) more than two weeks.
- When asked about the preferred **months** to travel to Greenland, most potential travellers prefer going to Greenland in April/May/June (29%), followed by July/August/September (20%) and January/February/March (17%).

When, realistically, do you think you will visit Greenland?
What would be your preferred months for a visit to Greenland?
How much time would you like to spend during your next trip to Greenland?
Basis: Potential travellers to Greenland from France (n=314)
Source: Visit Greenland market study France 2023 by NIT

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



🟩 Sustainability will be **critical** when deciding for a specific offer.

🟩 Sustainability will be **one of several aspects** when deciding for a specific offer.

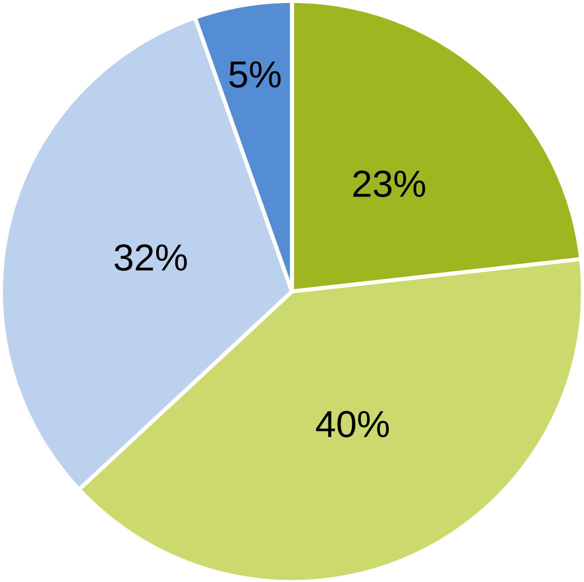
🟦 Sustainability will **not play a big role** when deciding for a specific offer.

⬜ Sustainable travel is **not something that interests me in general**.

- We asked the potential travellers how crucial sustainability is when planning a trip to Greenland.
- 34% state that sustainability will be the critical deciding factor and 48% consider it one of several aspects influencing the decision for a specific offer. Only a small share (16%) do not really consider sustainability and even less (3%) are not interested in this topic.

What do you think, how important will be the issue of sustainability (regarding ecological and social responsibility) when planning a trip to Greenland?
Basis: Potential travellers to Greenland in France (n=314)
Source: Visit Greenland market study France 2023 by NIT

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



It will be all about making our **travel dreams come true**, money and prices will only play a very minor role for our decision making.
We will look **primarily for good quality** of services and are willing to pay an adequate price for it.
We will look **primarily for a good price**, but the quality of services also has to be right.
We will be looking **primarily for a low price**, with everything else being less important.

- Potential travellers were also asked about the relevance of price and quality for their decision-making when travelling to Greenland.
- The majority (40%) consider themselves as quality-oriented, closely followed by 32% that are more price-oriented when travelling to Greenland.
- 23% state that the price only plays a minor role during the decision-making process because they want to make a travel dream come true.
- Only a minority of 5% belongs to the so-called cheap-tourists that only pay attention to the price in the decision-making process.

Regarding the factors of price and quality, what do you think will be true for you when travelling to Greenland?
Basis: Potential travellers to Greenland from France (n=314);
Source: Visit Greenland market study France 2023 by NIT

To learn 3:
Greenland product preferences

Experiences:

- For potential Greenland travellers in France it is most important to experience the glaciers/icebergs, stunning scenery, natural phenomena and wildlife.
- This ranking is the same as in 2017. However, the figures for all nature-oriented experiences are lower now than they have been in 2017.

Activities:

- The most sought-after activities in Greenland by potential travellers from France are dog sledding, experiencing quietness, wildlife watching, photography, eating/drinking local specialties and hiking. Potential travellers from France named on average 6.2 activities as interesting to them, while the potential traveller of 2017 named on average 7.3 activities.
- Compared to 2017 this means quite some change of the ranking. Especially guided nature excursions and wildlife watching became way less important and experiencing quietness stepped up in the ranking.

Getting there/around/organisation:

- Most potential Greenland travellers in France would prefer direct flights into Greenland and staying at multiple locations when being in Greenland. Among the plane travellers the slight majority prefers travelling individually. There is a share of around 40% of the potential guests in France who want to visit Greenland as a cruise destination, most of them would prefer travelling with a small/expedition style ship (less than 500 passengers).

Information sources:

- Internet search engines is the most popular sources for information of potential travellers in France when planning a trip to Greenland. Compared to 2017 classic offline sources became less relevant, but guide books still rank second.

Online content:

- When asked for their preferred kind of online content, most potential Greenland guests in France favour destination & accommodation images or nature videos ahead of 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. Following, but on a much lower level of approval, are sample itineraries or advices from a French travel agency.

Potential time of travel, duration and preferred months

- 8% of the potential travellers plan on visiting Greenland this year (2023), 23% in 2024, 26% in 2025 and 23% in 2026 or later. Half of the travellers would like to spend between one and two weeks, 22% less than that and the rest more. Most travellers prefer going in April/May/June followed by July/August/September.

Importance of price and quality

- 40% of the potential travellers are more quality-oriented while 32% are more price-oriented when travelling to Greenland. A smaller share of 23% pays no attention to the price at all and 5% are only focused on a low price.

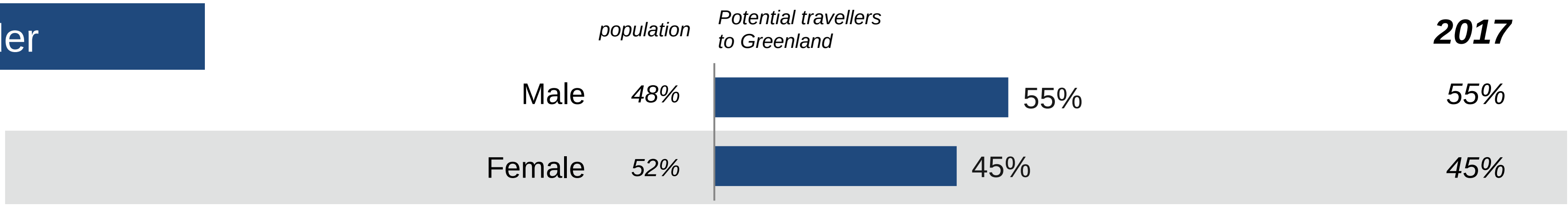
- This chapter is basically the CORE of the study and was the focus of the questionnaire.
- The results help to understand in detail how the potential travellers would like to spend their holidays in Greenland. This knowledge should give you substantial help with regard to product development, marketing strategy and communication.
- It is even possible and smart to go deeper into different segments of potential guests; e.g. age groups (chapter 4) or with the Visit Greenland segments (chapter 5).

4. Socio-demographic profiles of potential travellers to Greenland

Photo by Mads Pihl - Visit Greenland

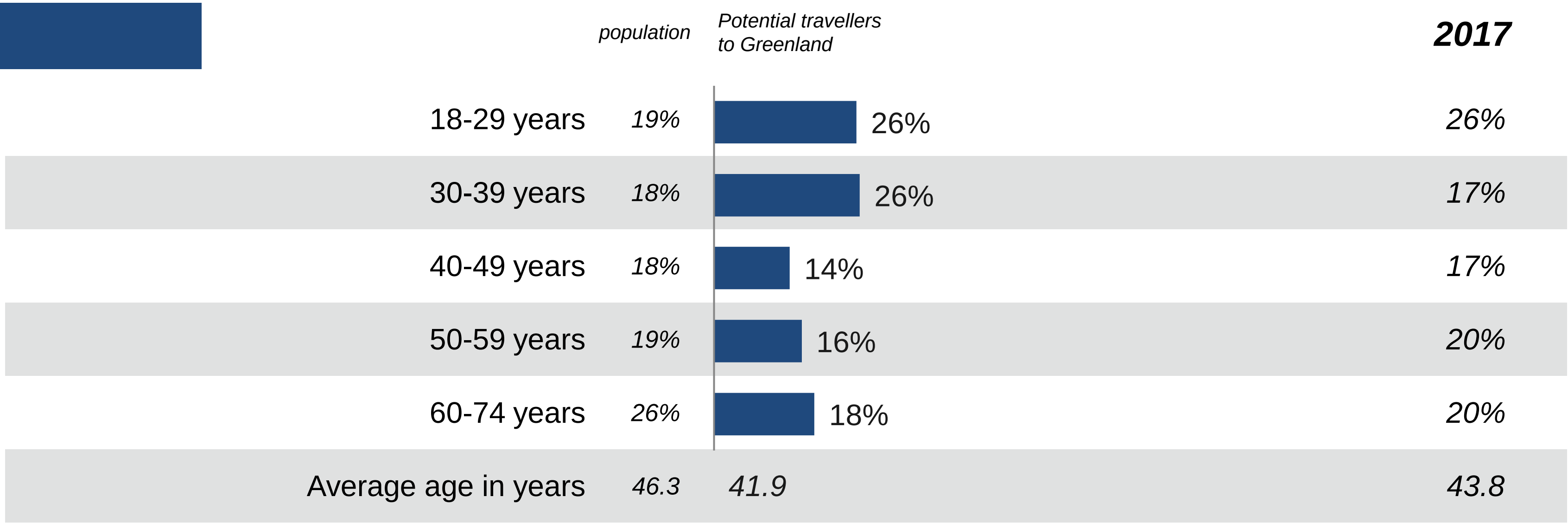
Potential travellers to Greenland: Demographics I (gender & age)

Gender



	population	Potential travellers to Greenland	2017
Male	48%	55%	55%
Female	52%	45%	45%

Age



	population	Potential travellers to Greenland	2017
18-29 years	19%	26%	26%
30-39 years	18%	26%	17%
40-49 years	18%	14%	17%
50-59 years	19%	16%	20%
60-74 years	26%	18%	20%
Average age in years	46.3	41.9	43.8

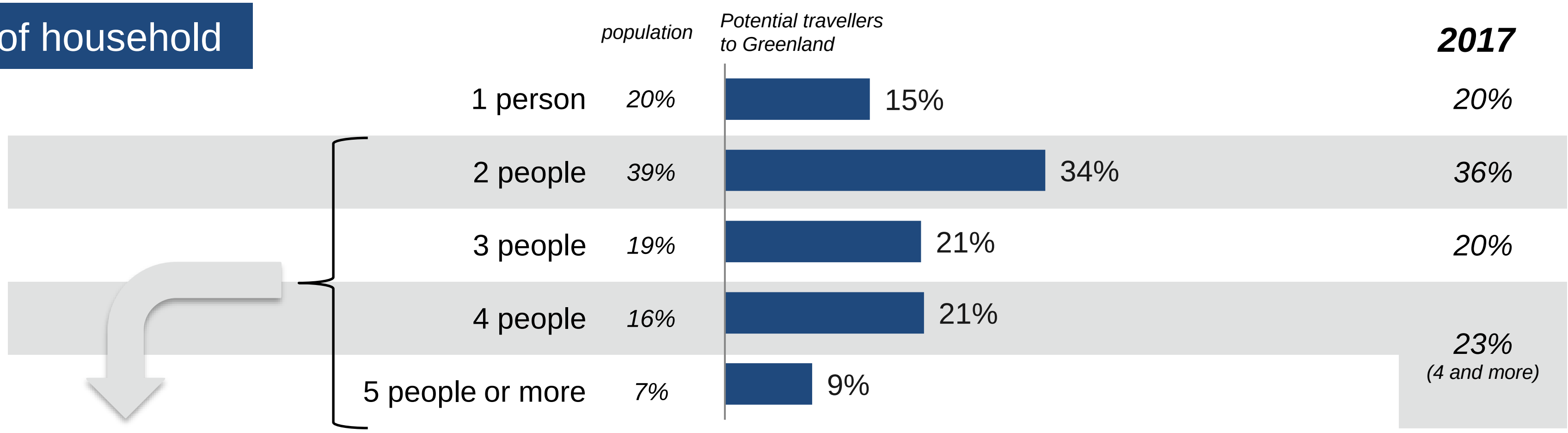
- Potential Greenland travellers in France are slightly more often male than female.

- The **age structure** of potential Greenland travellers is dominated by younger travellers. More than half of the potential travellers is below 40 years old. The age group of 40 to 49 years old travellers is the smallest.
- The average age of potential travellers to Greenland from France is 41.9 years.
- The comparison to 2017 shows a higher share of people in the group of 40-74 years. Just the age group of 30-39 years had a lower share in 2017.

Basis: All respondents in France (n=3,000), potential travellers to Greenland from France (n=314); Source: Visit Greenland market study France 2023 by NIT, Visit Greenland/Air Greenland market study France 2017 by NIT

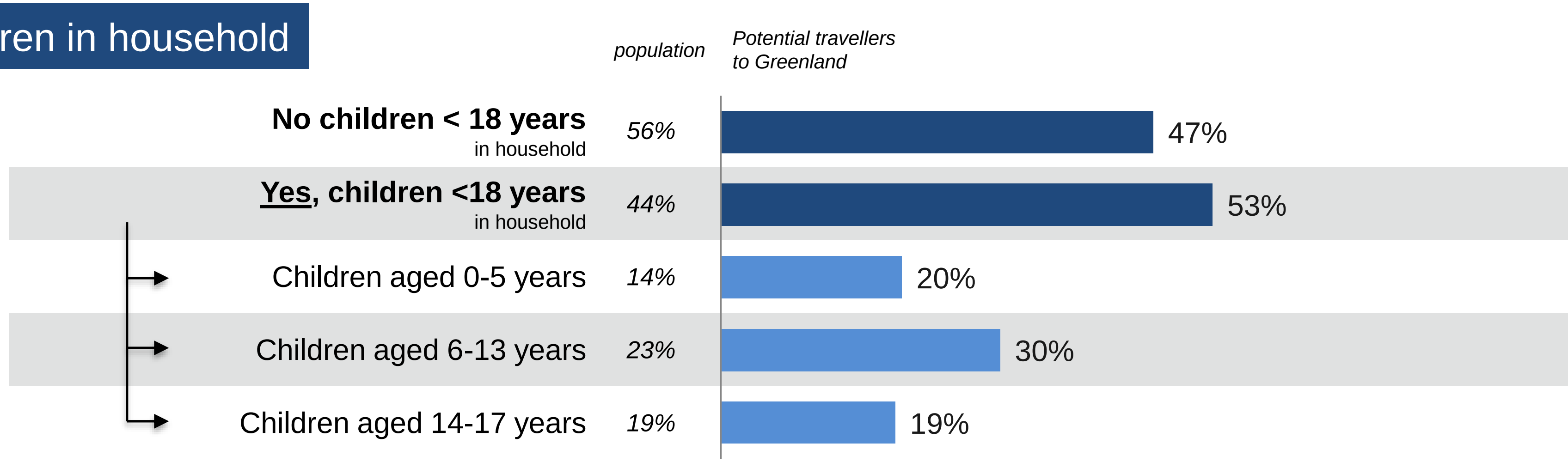
Potential travellers to Greenland: Demographics II (size of household)

Size of household



	population	Potential travellers to Greenland	2017
1 person	*20%*	15%	*20%*
2 people	*39%*	34%	*36%*
3 people	*19%*	21%	*20%*
4 people	*16%*	21%	*23%* (4 and more)
5 people or more	*7%*	9%	

Children in household



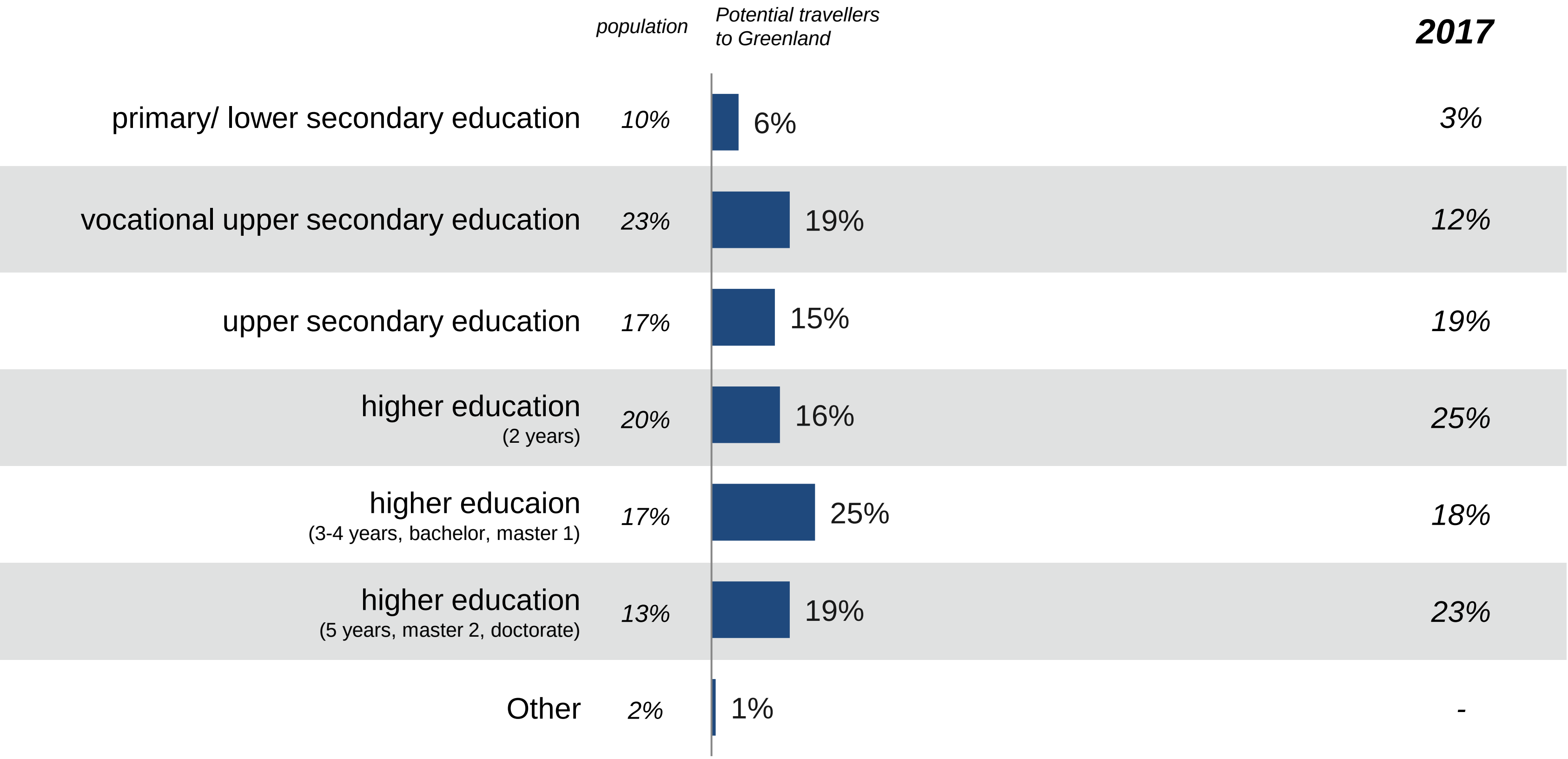
	population	Potential travellers to Greenland
No children < 18 years in household	*56%*	47%
Yes, children <18 years in household	*44%*	53%
Children aged 0-5 years	*14%*	20%
Children aged 6-13 years	*23%*	30%
Children aged 14-17 years	*19%*	19%

- » The biggest group of potential travellers to Greenland in France lives in households of two people.
- » More than half of the potential travellers to Greenland from households with 2 or more people live with children in the household. This is a much higher share than in the French population. 20% of these potential travellers have children younger than 5 years in the household, 30% children aged from 6 to 13 and 19% have teenagers in the household. The share of children below 13 years is considerably higher than in the population.

Basis: All respondents in France (n=3,000, with 2 or more people in household n=2,408), potential travellers to Greenland from France (n=314, with 2 or more people in household n=266); Missing % to 100: No answer
Source: Visit Greenland market study France 2023 by NIT, Visit Greenland/Air Greenland market study France 2017 by NIT

Potential travellers to Greenland: Demographics III (education)

Education

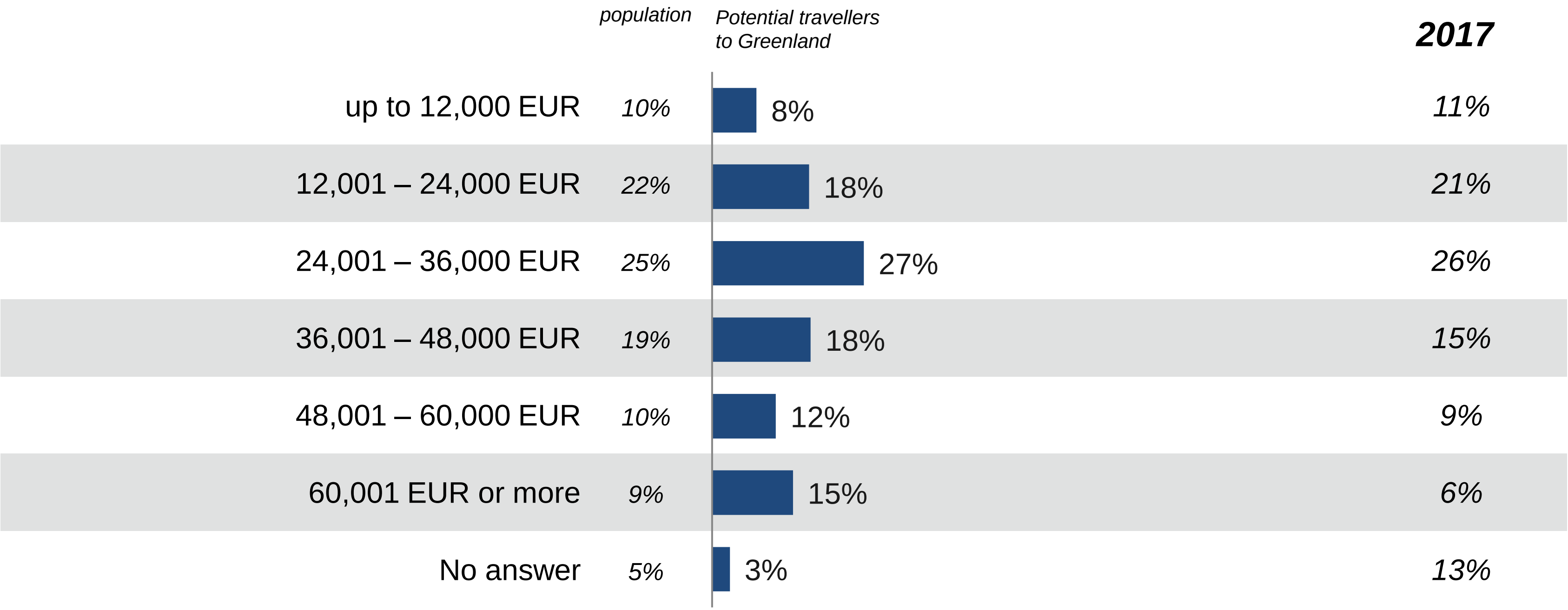


- Regarding their formal education, we find that potential Greenland travellers in France have a higher education level as the average French population.
- 60% of the potential travellers from France have at least a high education.
- However, the comparison of 2017 and 2023 shows that the share of higher educated travellers has decreased over the years, while the share of those with lower education increased considerably.

Basis: Total population (n=3,000) vs. potential travellers to Greenland from France (n=314); Source: Visit Greenland market study France 2023 by NIT, Visit Greenland/Air Greenland market study France 2017 by NIT

Potential travellers to Greenland: Demographics IV (income)

Household net income per year

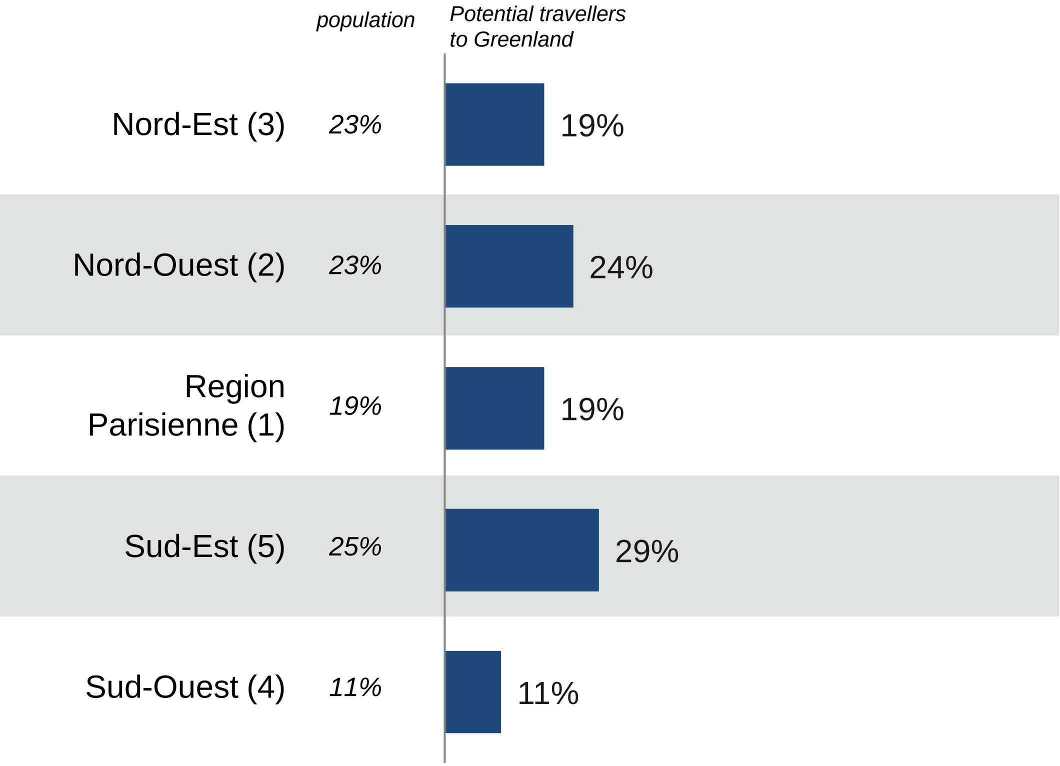


- Looking at the average yearly net income per household, the biggest group amongst potential travellers to Greenland earns 24,001 to 36,000 EURs.
- Yet, the share of groups with income higher than 60,001 EUR is much bigger for the potential traveller than in the population.
- In comparison to 2017, we observe a growth in the income segments of 24,001+ EUR and a decline in the segments below 24,000 EUR.

Basis: Total population (n=3,000) vs. potential travellers to Greenland from France (n=314); Source: Visit Greenland market study France 2023 by NIT, Visit Greenland/Air Greenland market study France 2017 by NIT

Potential travellers to Greenland: Demographics V (regions)

Regions



- The regional distribution of potential travellers to Greenland in France is quite evenly spread, with a slight concentration in the northwest and southeast area of France.

Basis: Total population (n=3,000) vs. potential travellers to Greenland from France (n=314); Source: Visit Greenland market study France 2023 by NIT, Visit Greenland/Air Greenland market study France 2017 by NIT

To learn 4: Socio-demographic profiles of potential travellers to Greenland

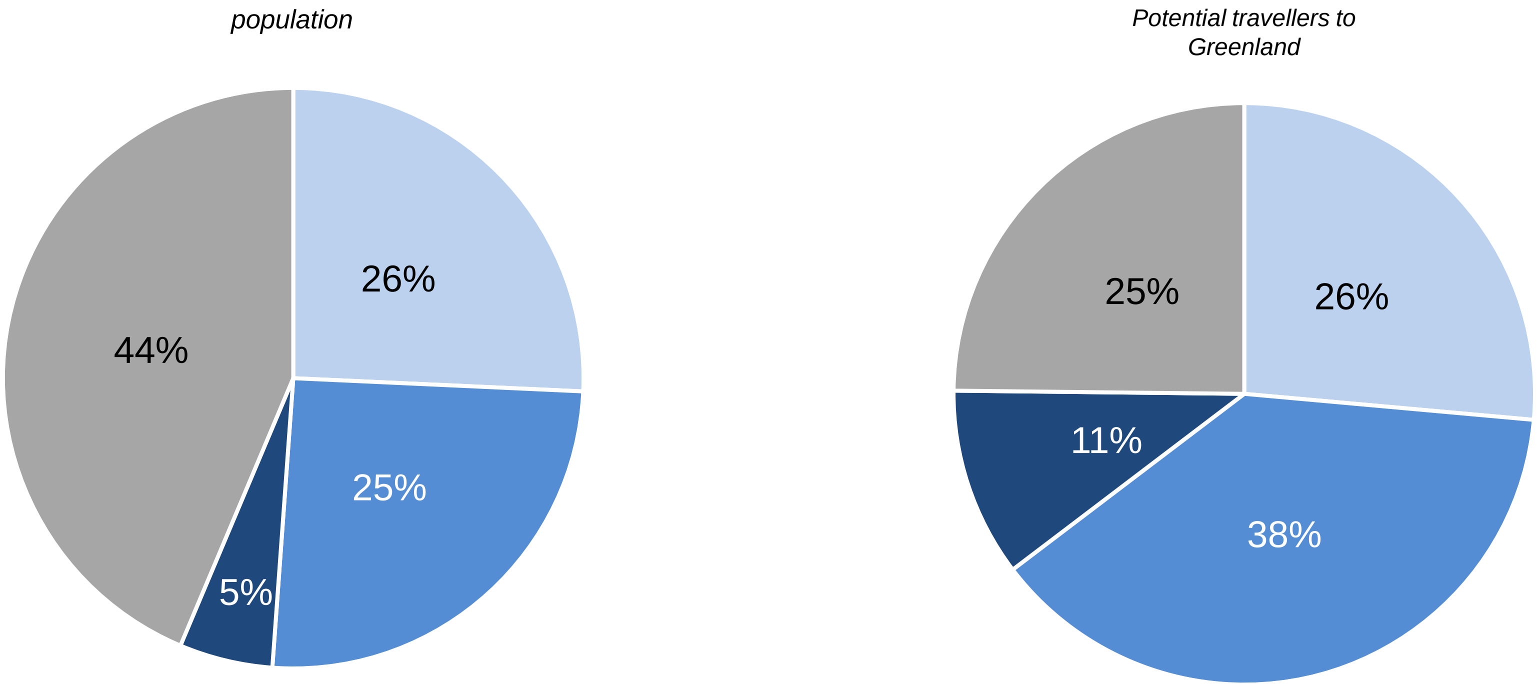
- Gender: Potential Greenland travellers are slightly more often male than female.
- Age: The age structure of potential Greenland travellers is dominated by younger travellers. More than half of the potential travellers is below 40 years old. The age group of 40 to 49 years old travellers is the smallest. The average age of potential travellers to Greenland from France is 41.9 years.
- Size of household and children in household: The biggest group of potential travellers to Greenland lives in households of two people. More than half of the potential travellers not living alone live with children in the household. This is a much higher share than in the general population. The share of children below 13 years is higher than in the population.
- Education: Regarding their formal education, we find that potential travellers in France have a higher education level as the French population. Comparison to 2017 shows that the share of highly educated travellers has decreased and those with lower education has increased.
- Annual household net income: The biggest group amongst potential travellers to Greenland earns between 24,001 and 36,000 Euros. The share of groups with income above 60,001 Euros is higher than in the population. This segment has increased since 2017.
- Regional structure: The regional distribution of potential travellers to Greenland in France is quite evenly spread, with a slight concentration in the northwest and southeast area of France.

- In most regards, the demographic profiles of potential Greenland travellers in France do not differ much from the population. This means you do not have to take peculiarities into account when addressing them.
- On the other hand, the small but noticeable differences may show opportunities for specific targeting
(e.g. overall a bit younger, higher share with children, especially younger children and a bit higher income).

5. Segmentation: Adventure & Sustainability

Photo by Mads Pihl - Visit Greenland

Visit Greenland adventurer segments



Soft Adventurer
(comfort, a little physical exertion, and a more observant approach to local culture)

Immersive Adventurer
(some degree of physical activity, and more engaged contact with locals and the local culture)

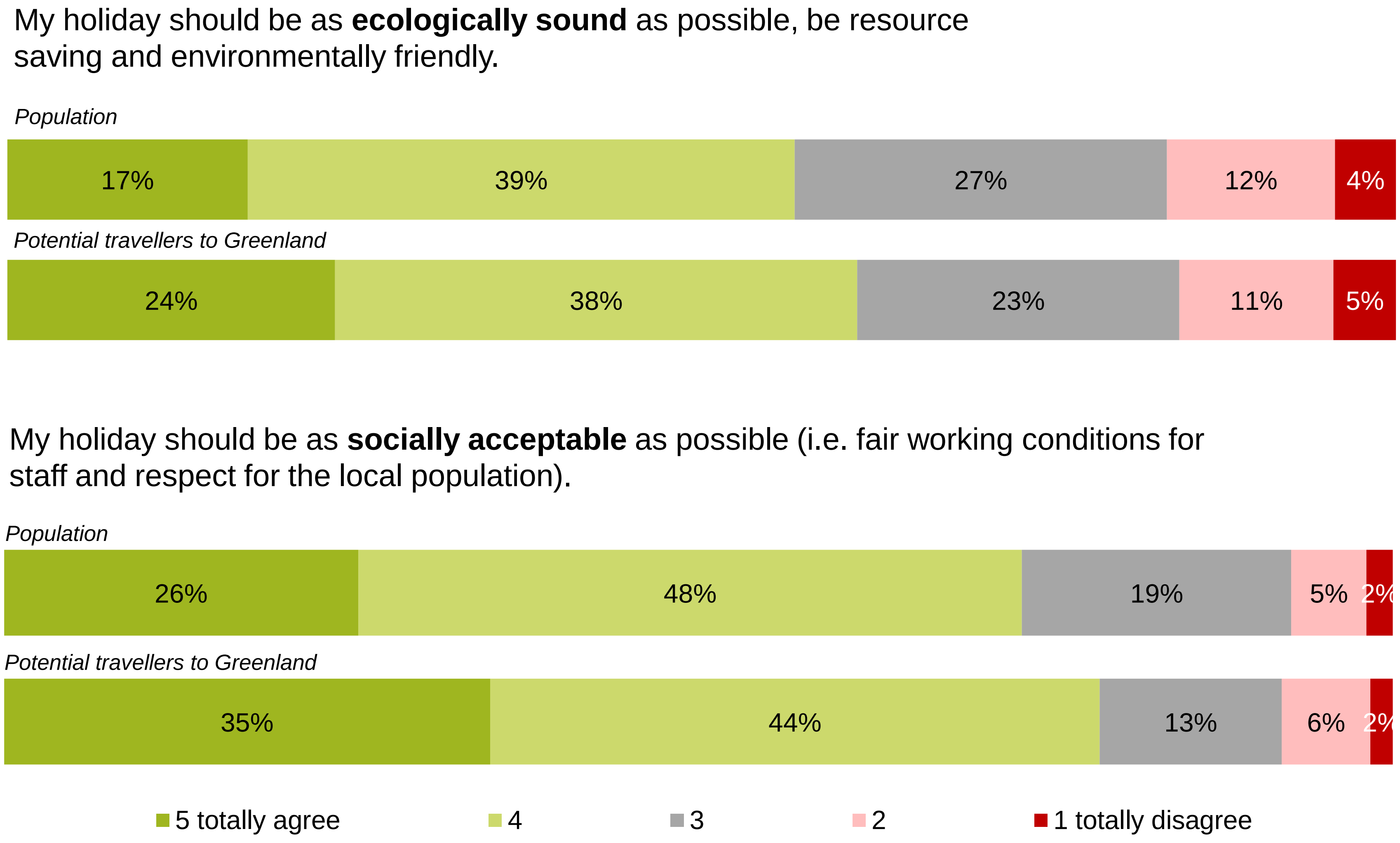
Ultimate Adventurer
(a full 'deep dive' into nature and/or physical challenges, and/or 'living like a local' to have as culturally authentic experiences as possible)

None of the VG adventure segments

- 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 France the share of non-adventurers (those not fitting with the definitions of the segments) is a lot higher in the population (44%) than for potential travellers (25%).
- With the potential travellers, 26% belong to the "soft adventurers", 38% to the "immersive" and 11% to the "ultimate adventurers".

If you had to identify as one of the following tourist types, which one would it be?
Basis: All respondents in France (n=3,000), potential travellers to Greenland from France (n=314); Source: Visit Greenland market study France 2023 by NIT

Attitude towards sustainable travelling *(population vs. potential travellers)*



- 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.
- Potential Greenland travellers in France have a more pronounced attitude towards sustainability than the French population in general.
- Nearly two thirds (62%) of the potential travellers prefer their holiday to be ecologically sound and even 79% would like it to be socially acceptable. These shares are a bit lower in the French population overall.

Below are two statements about holidays in general. Please indicate the extent to which each of these statements is relevant to you.
Basis: All respondents in France (n=3,000) and potential travellers to Greenland in France (n=314)
Source: Visit Greenland market study France 2023 by NIT

To learn 5:
Segmentation: Adventure & Sustainability

Adventurer segments:

- Looking at the population in France, there is a high share of non-adventurers (44%), this is followed by the soft adventurers (26%). One forth of the population (25%) are immersive adventurers and only 5% consider themselves as ultimate adventurers.
- Looking at the potential Greenland travellers in France, one forth are non-adventurers. The Immersive Adventurers are dominating with a share of 38%, followed by the soft adventurers with 26%. 11% are ultimate adventurers.
- Looking at the differences between the population and the potential travellers, you find that the potential travellers have higher shares of Immersive and ultimate adventurers, and the same shares of soft adventurers.

Attitudes towards sustainability

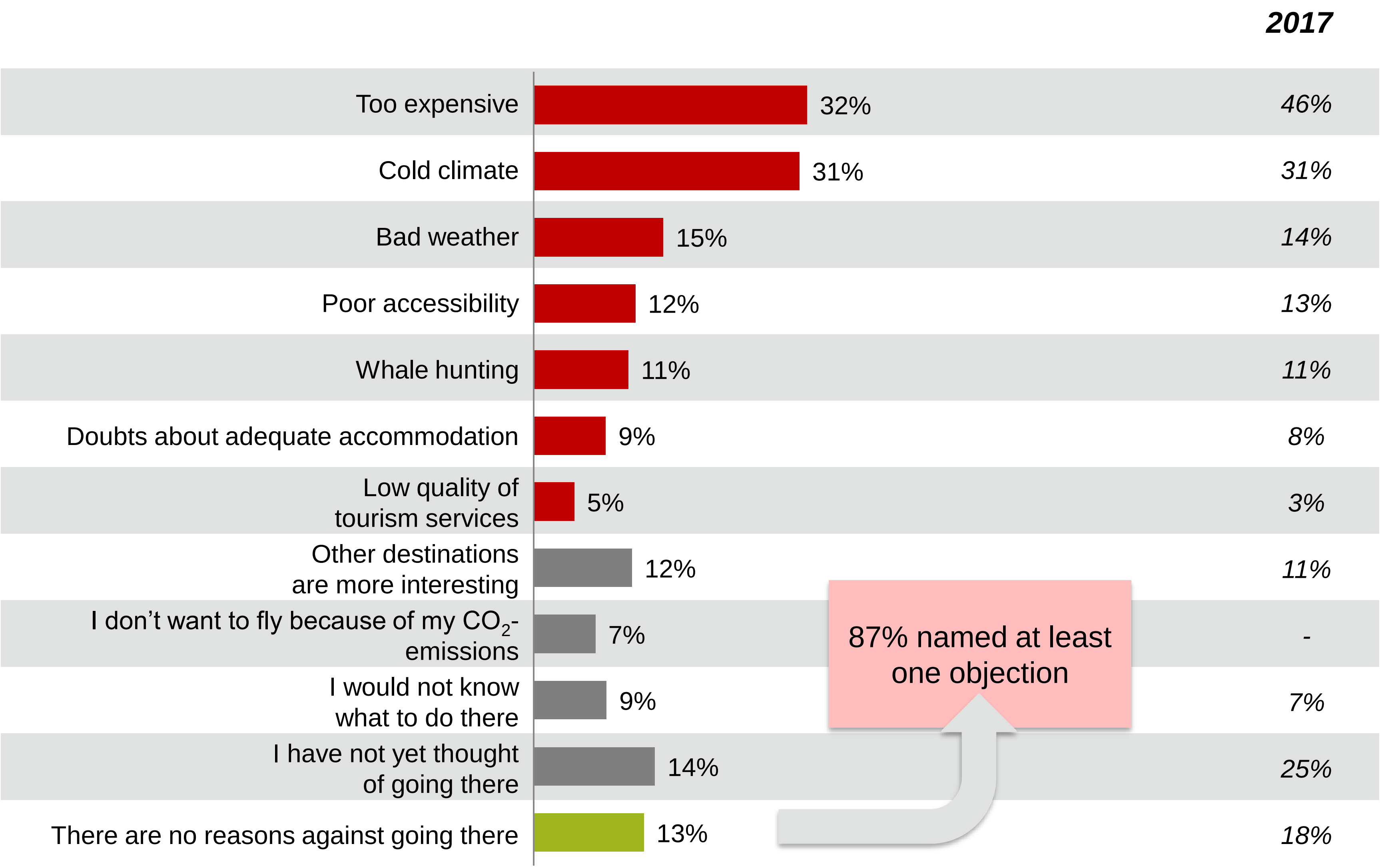
- Potential Greenland travellers in France have a more pronounced attitude towards sustainability than the French population in general.
- Nearly two thirds of the potential travellers prefer their holiday to be ecologically sound and even 79% would like it to be socially acceptable.

- The Visit Greenland segmentation approach is on the one hand very helpful to further understand the potential Greenland travellers in France, on the other hand it enables us understand the size and needs of the segments to target them better.

6. Reasons against travelling to Greenland

Photo by Air Zafari & Mads Pihl - Visit Greenland

Reasons against travelling to Greenland (*population*)

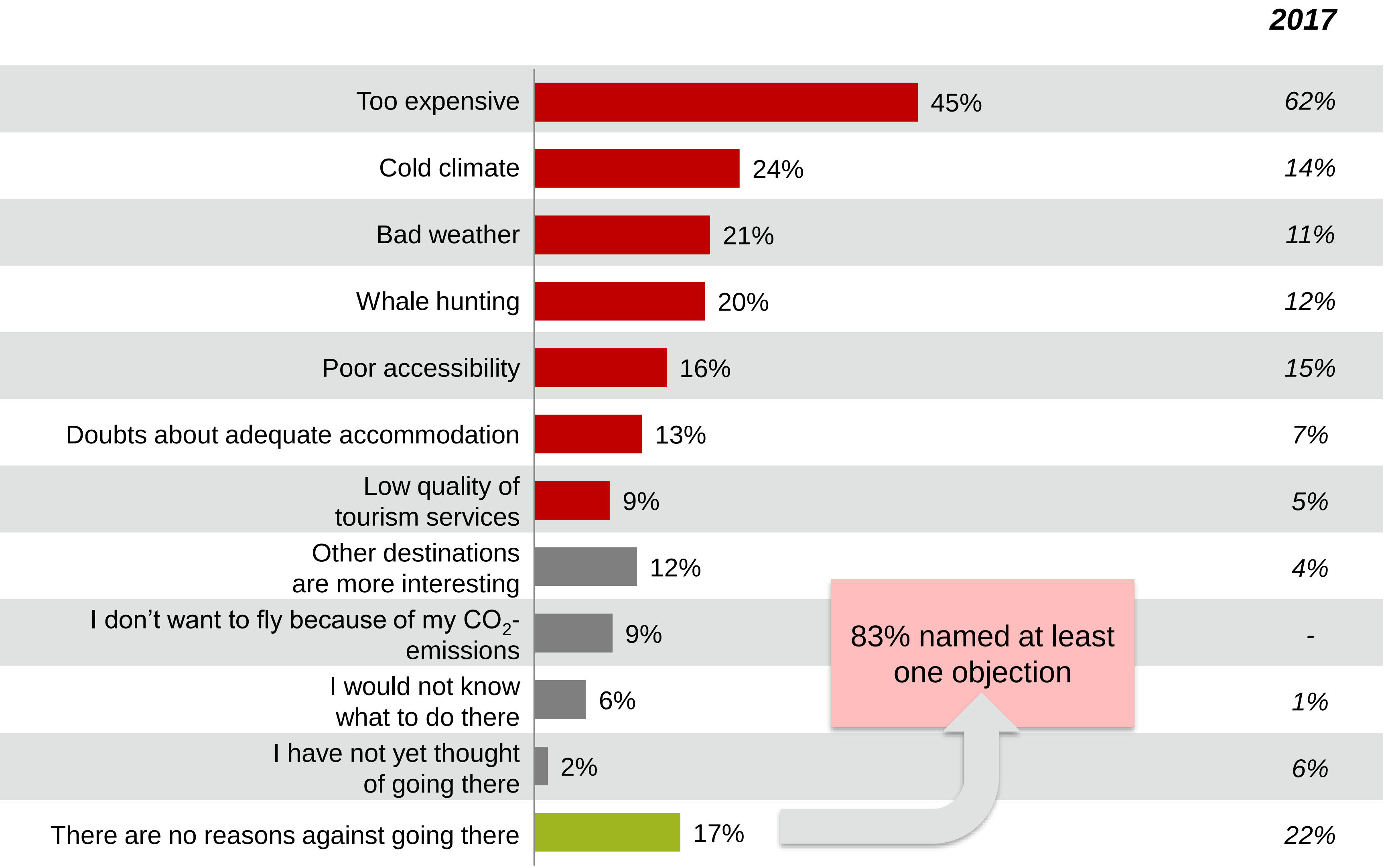


87% named at least one objection

- One of the final questions in the survey examines reasons against travelling to Greenland.
- The good news first: 13% of the French have no general objections to travel to Greenland. In turn, this means that 87% 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. Bad weather and poor accessibility are also considerable reasons against travelling to Greenland for the French population.
- Compared with 2017, the figure for too expensive has dropped quite significantly.
- There are also important factors in place, that are not directly linked to the tourism offer in Greenland (marked grey).

What are in your opinion reasons against travelling to Greenland (2017: Greenland, Faroe Islands, Iceland)?
Basis: All respondents in France (n=3,000)
Source: Visit Greenland market study France 2023 by NIT, Visit Greenland/Air Greenland market study France 2017 by NIT

Reasons against travelling to Greenland (*potential travellers to Greenland*)



		2017
Too expensive	45%	62%
Cold climate	24%	14%
Bad weather	21%	11%
Whale hunting	20%	12%
Poor accessibility	16%	15%
Doubts about adequate accommodation	13%	7%
Low quality of tourism services	9%	5%
Other destinations are more interesting	12%	4%
I don't want to fly because of my CO_2-emissions	9%	-
I would not know what to do there	6%	1%
I have not yet thought of going there	2%	6%
There are no reasons against going there	17%	22%

83% named at least one objection

- Even more important is to understand what stops those interested in travelling to Greenland from going there.
- Among the potential travellers in France 17% sees no reason to not travel to Greenland. This indicates that even among the potential travellers to Greenland 83% have at least one objection against going there.
- For the rest the main barrier seems to be the price. 45% of the potential travellers consider Greenland too expensive. This figure is much higher than in the population.
- Three other important barriers are the cold climate, bad weather and whale hunting.
- Interestingly, the figure for too expensive dropped significantly since 2017 while the figures for most of the other reasons saw an increase.

What are in your opinion reasons against travelling to Greenland (2017: Greenland, Faroe Islands, Iceland)?
Basis: Potential travellers to Greenland in France (n=314); Source: Visit Greenland market study France 2023 by NIT, Visit Greenland/Air Greenland market study France 2017 by NIT

To learn 6: Reasons against travelling to Greenland

Population:

- 13% of the French have no general objections to travel to Greenland. Most important reasons against travelling to Greenland are the expected high costs, closely followed by the coldness. Bad weather (15%) and poor accessibility (12%) are also considerable reasons against travelling to Greenland for the French population. There are also important factors in place, that are not directly linked to the tourism offer in Greenland.

Potential guests:

- Among the potential travellers in France 17% sees no reason to not travel to Greenland. For the rest the main barrier seems to be the price. 45% of the potential travellers consider Greenland "too expensive". This figure is much higher than in the population. Three other important barriers are the cold climate, bad weather and poor accessibility.
- Interestingly, the figure for too expensive dropped significantly since 2017 while the figures for most of the other reasons saw an increase.

- The results of Chapter 1 show a huge potential of people interested to travel to Greenland in France.
- To transform these potential guests into actual ones, it is not only important to know who they are (chapter 4) and what they want (chapter 3) 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 between the population and potential travellers which might help you for more precise targeting.

7. Summary and main conclusions (all markets)

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”

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- 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!

NIT
NEW INSIGHTS FOR TOURISM

Ulf Sonntag
Managing Director

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