Positioning and potentials of Greenland on its main GLOBAL markets

Summary of the survey results in DE, FR, UK, DK, SE, NO, US, CA

April 2023

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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 SUMMARY of the results in 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.

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

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