Positioning and potentials of Greenland on the BRITISH holiday travel market

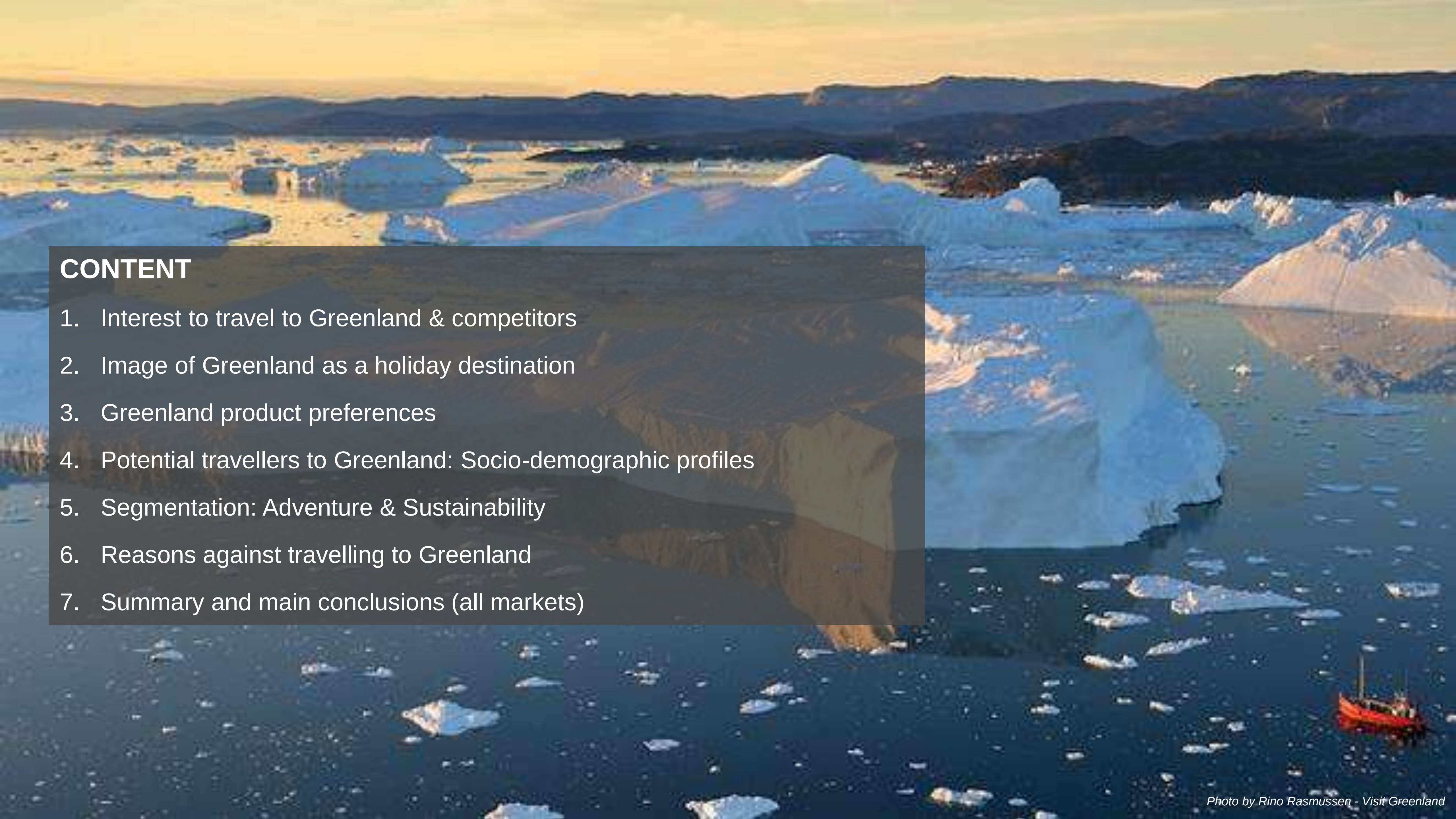
Full report

April 2023

Maike Braun, Nadine Yarar & Ulf Sonntag, NIT

Introduction and background of this study

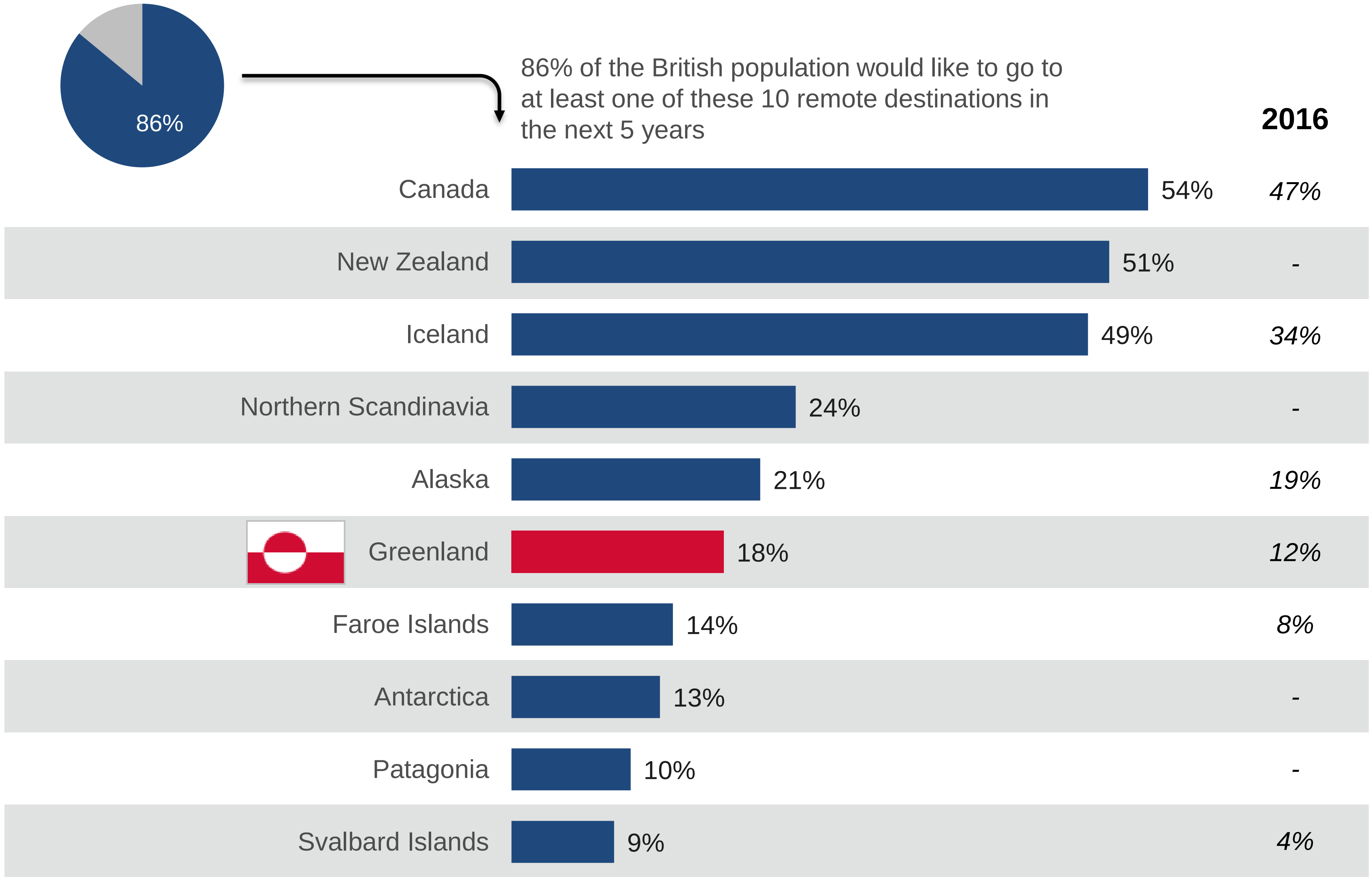
- Visit Greenland has commissioned the Institute for Tourism Research in Northern Europe (NIT) to conduct a market research studies on the "Positioning and potential of Greenland" in eight European and North American countries (DE, FR, UK, DK, SE, NO, US, CA).
- The central aim is to get a thorough and 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 market report about the BRITISH market**.
- The results are based on 3,000 online interviews that were conducted in the UK in January 2023 by our partner Dynata. The results are representative for the population in the UK aged 18-75 years.



CONTENT

Photo by Rino Rasmussen - Visit Greenland

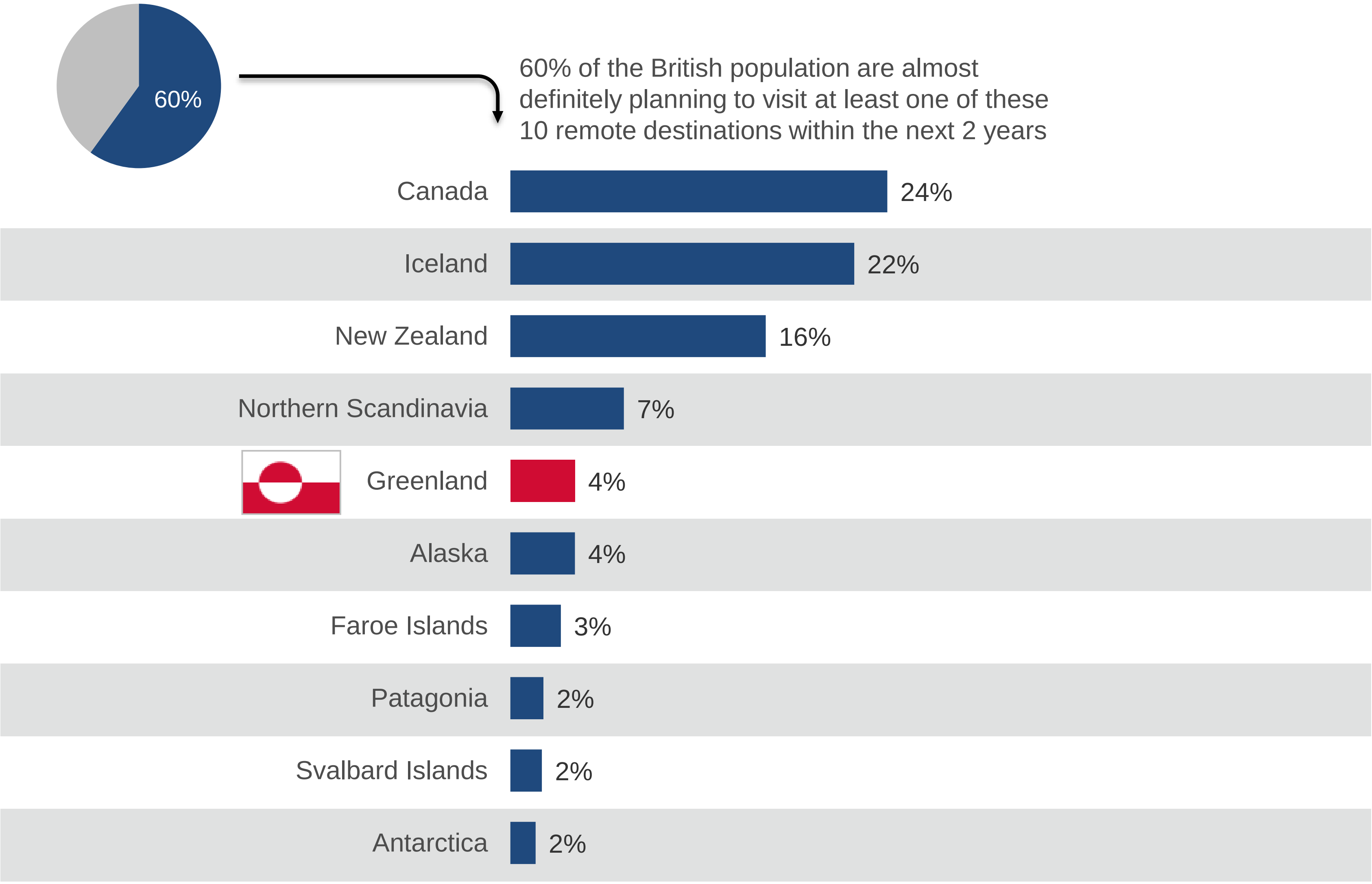
General interest to travel to remote destinations in the British population



- 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?”*
- 86% of the British 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, New Zealand, Iceland and Northern Scandinavia follow.
- 18% would like to go to Greenland.
- Compared to 2016 the shares of the surveyed countries increased. Interest to travel to Greenland increased by 6%-pts since 2016.
- *Attention: The list of destinations in 2016 was different from 2023. This might have a methodological effect on the results.*

Which of these destinations would you like to visit within the next 5 years?
Basis: All respondents in the UK (n=3,000)
Source: Visit Greenland market study UK 2023 by NIT, Visit Greenland/Air Greenland market study UK 2016 by NIT

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



- 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?*”
- 60% of the British 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.
- 4% are almost definitely planning to visit Greenland within the next 2 years.

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

Volume extrapolations of actual and potential travellers to Greenland in the UK total

FUNNEL	Definition	
total	British population 18-75 years old	47.5 million
total potential	“like to travel to Greenland within the next 5 years”	8.6 million
‘hard’ potential/planners	“almost definitely planning to visit Greenland within the next 2 years”	1.9 million
visitors	Plane and cruise passengers to Greenland in 2019	5,668 plane: 1,743 cruise: 3,925

- The volume funnel puts the reported market shares in relation to the actual market size and delivers concrete volume figures.
- In the population of 48 million British 18-75 years old, you find almost 9 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 2 million persons.
- Comparing this with the actual pre-pandemic British arrivals in Greenland of 6,000 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 the UK (n=3,000)
Source: Visit Greenland market study UK 2023 by NIT

Competition in the UK: 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%	23%
Iceland	74%	33%
Canada	68%	35%
New Zealand	65%	24%
Alaska	46%	10%
Northern Scandinavia	43%	11%
Antarctica	34%	6%
Faroe Islands	32%	7%
Svalbard Islands	26%	5%
Patagonia	25%	5%

- In the UK, potential travellers to Greenland are also interested in 4.1 other remote destinations in our question set.
- The fiercest competitor is by far Iceland. 74% of the potential Greenland travellers also want to go there.
- It is followed by Canada, New Zealand, Alaska and Northern Scandinavia
- 23% of the total potential Greenland travellers are almost definitely planning to visit Greenland in the next 2 years. Even more, 35%, are almost definitely planning to visit Canada in the next 2 years, 33% Iceland and 24% New Zealand.

Basis: Potential travellers to Greenland in the UK (n=540)
Source: Visit Greenland market study UK 2023 by NIT

To learn 1:
Interest to travel to Greenland & competitors

Interest to travel to remote destinations

- In the next 5 years, 86% of the British population would like to go to at least one of the 10 remote destinations covered in the questionnaire. 60% 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, followed by New Zealand, Iceland Northern Scandinavia.
- Canada, Iceland and New Zealand are also the most popular destinations in terms of the “hard potential”.
- 18% of the British would like to go to Greenland and 4% are almost definitely planning to go there.
- Compared to 2016 the “general” potential of the surveyed countries has increased. Interest to travel to Greenland increased by 6%-pts since 2016. As the list of destinations in 2016 was different, there may have been a methodological effect on the results.

Competitive situation in the UK

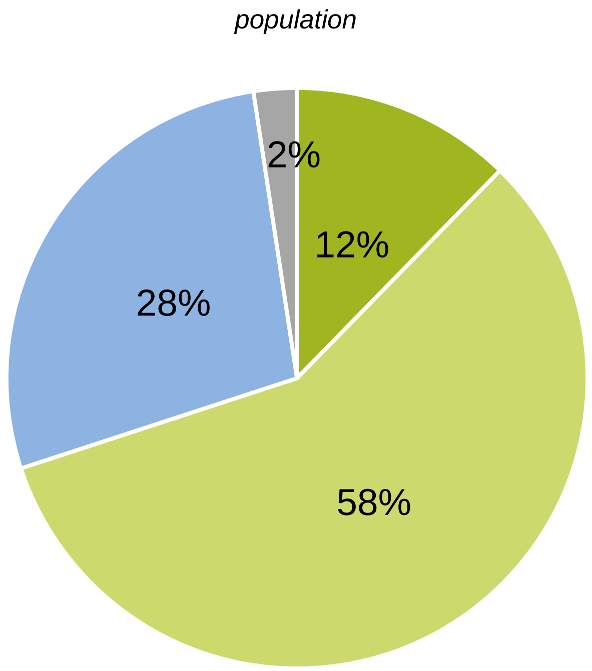
- A look at the competitive situation of Greenland shows that in the UK, potential travellers to Greenland are also interested in 4.1 other remote destinations in our question set.
- The fiercest competitor is by far Iceland. 74% of the potential Greenland travellers also want to go there. It is followed by Canada, 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 or New Zealand before they actually travel to Greenland.

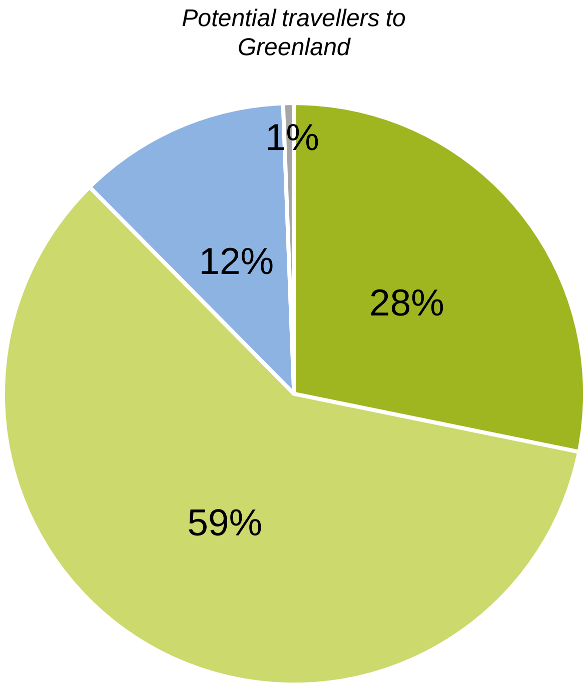
- Compared with the actual demand, there is a huge interest to travel to Greenland in the UK. This is where destination marketing comes in. The following parts of the report should help with strategic marketing decisions.
- When looking at the comparison over time and the development since 2016, it shows that the potential for all countries in the survey has increased and the share of those British interested in going to Greenland within the next 5 years grew by 6%-pts since 2016.
- The results also show that Greenland is in fierce competition with other (remote) destinations around the world.

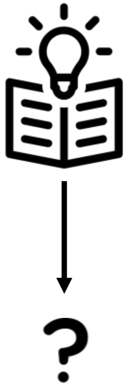
2. Image of Greenland as a holiday destination

Photo by Mads Pihl - Visit Greenland

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







- I have heard/read a lot about Greenland.
- I only have a vague idea about Greenland.
- I know Greenland in name only, and have no idea what it is like.
- I have never heard of Greenland.

» Those British who have not been to Greenland before where asked about their knowledge of Greenland as a travel destination.

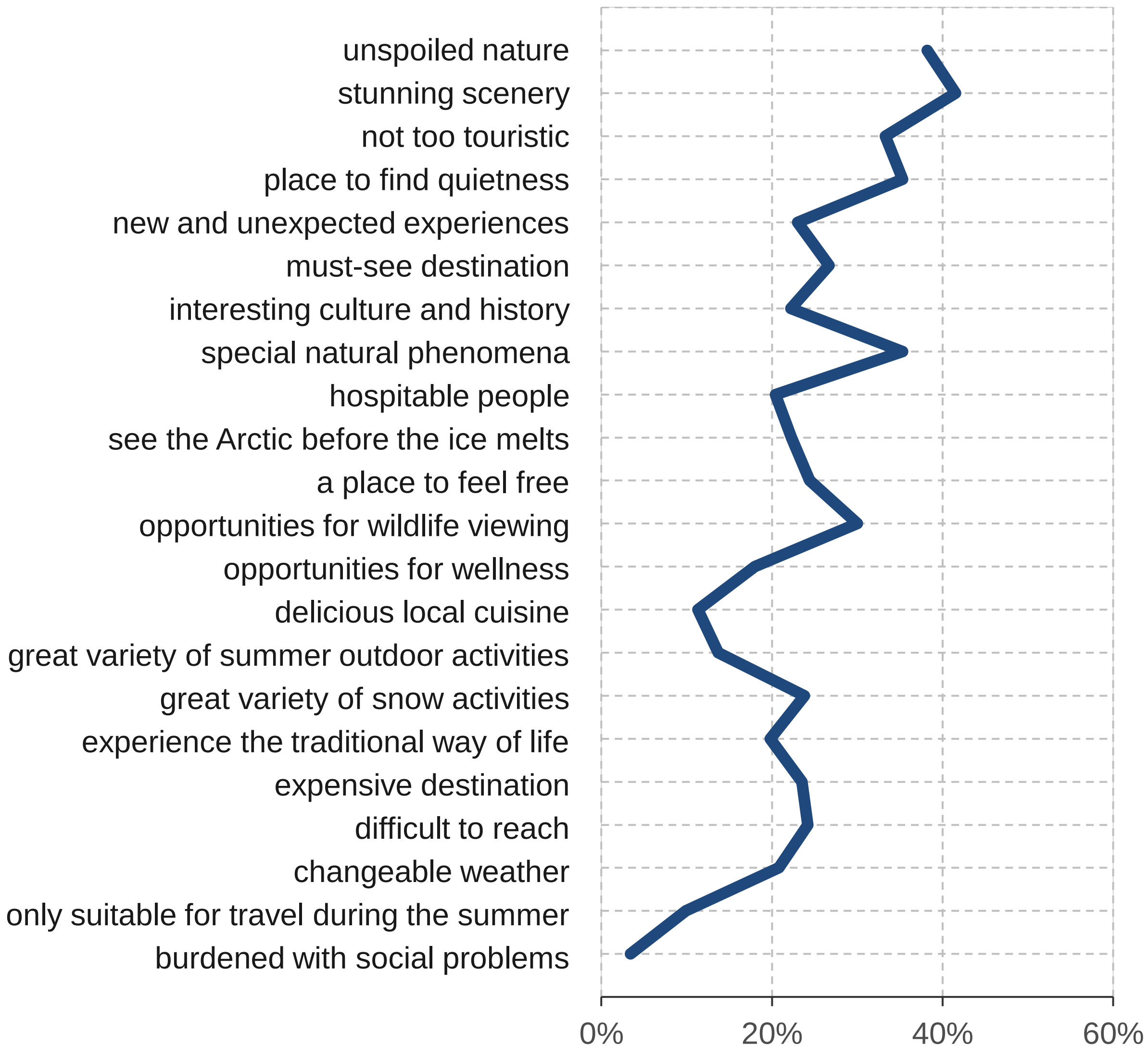
» 12% claim to have heard or read a lot about Greenland and can therefore be considered has having high knowledge about the country.

» More than half (58%) have only a vague idea of Greenland and more than a quarter (28%) knows the country only by name. A very small minority of 2% has never heard of Greenland.

» Looking at the potential travellers to Greenland, the share of those knowing a lot about Greenland increases to 28% compared to the general population.

How well do you know Greenland as a travel destination?
Basis: Respondents, in the UK who have not been previously in Greenland (population: n=2,908; potential travellers: n=490)
Source: Visit Greenland market study UK 2023 by NIT

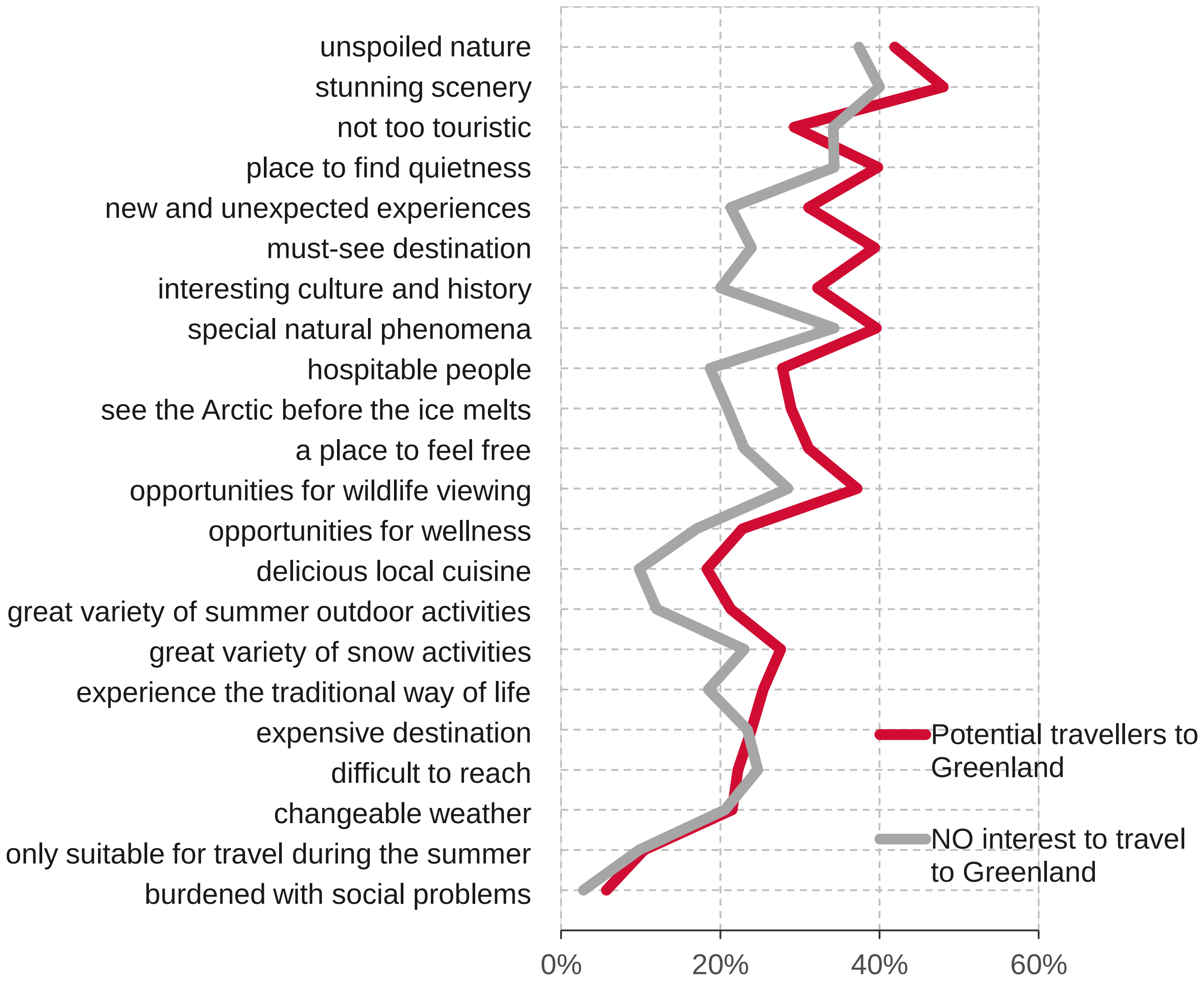
Image of Greenland in the British population



- The **key image factors** of Greenland in the British population are:
  - Stunning scenery (42%)
  - Unspoiled nature (38%)
  - Quietness (35%)
  - Natural phenomena (35%)
  - Not too touristic (33%)
- Greenland is **not famous** for:
  - Summer outdoor activities (14%)
  - Delicious local cuisine (11%)
  - Only suitable for travelling in the summer (10%)
  - Social problems (3%)
- Persons in the UK name on average 5.2 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 the UK (n=3,000)
Source: Visit Greenland market study UK 2023 by NIT

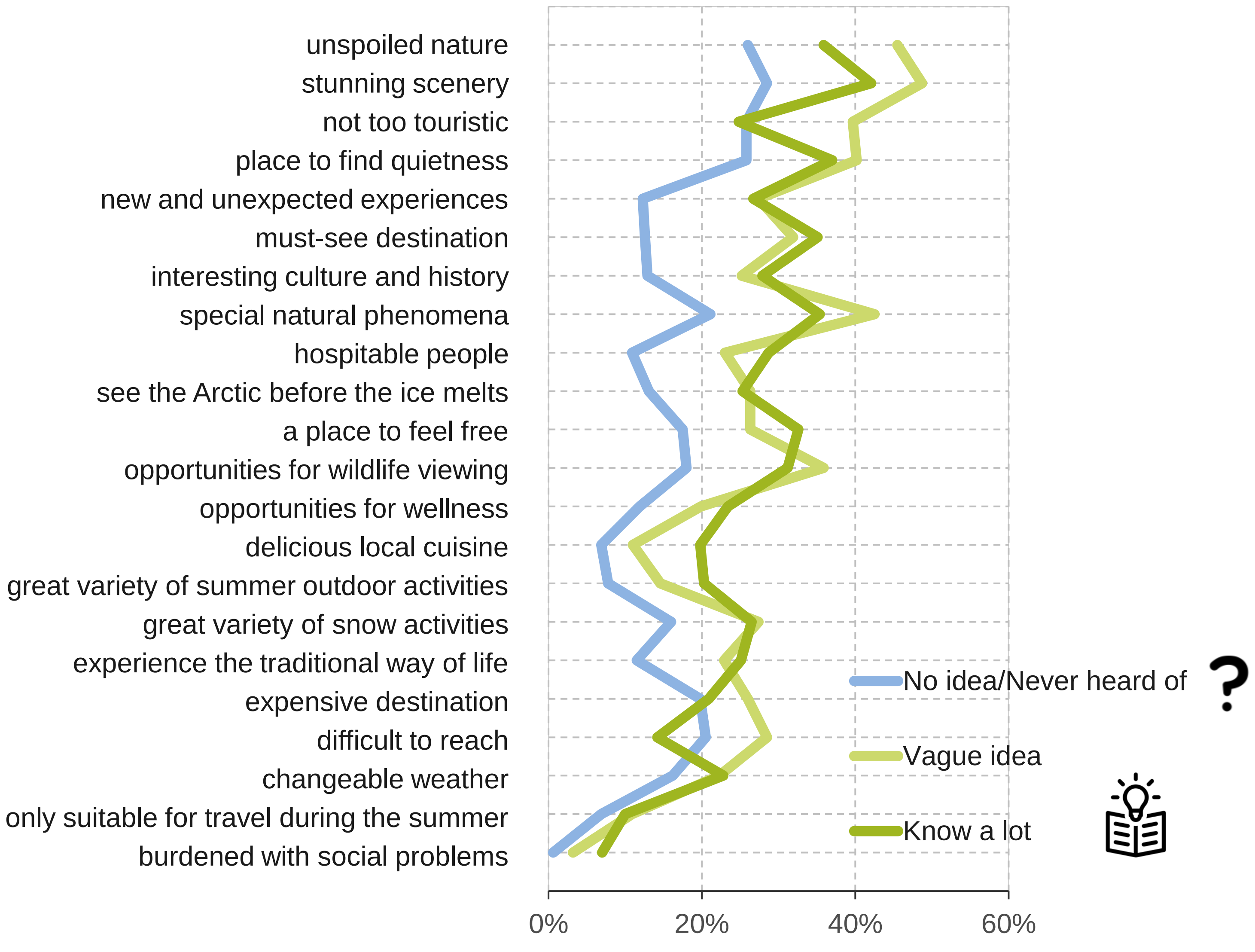
Image of Greenland in the British population: With/without interest to travel to Greenland



- The **most striking differences** of persons WITH interest to travel to Greenland compared to persons WITHOUT interest are:
  - Must-see destination (+16%-pts.)
  - Interesting culture/history (+12%-pts.)
  - New/unexpected experiences (+12%-pts.)
  - Summer outdoor activities (+9%-pts.)
  - Hospitable people (+9%-pts.)
  - Wildlife viewing (+9%-pts.)
  - Delicious local cuisine (+9%-pts.)
- There are only two characteristics, where persons with NO interest show higher figures: “difficult to reach” (+3%-pts.) and “not too touristic” (+5%-pts.)
- Persons WITH interest to travel to Greenland name on average 6.3 of the 21 characteristics in the question. Persons with NO interest name 5.0 characteristics.

Please tell me which of these characteristics do you think particularly apply to Greenland?
Basis: Respondents in the UK WITH interest to travel to Greenland (n=540) and WITHOUT interest to travel to Greenland (n=2,460)
Source: Visit Greenland market study UK 2023 by NIT

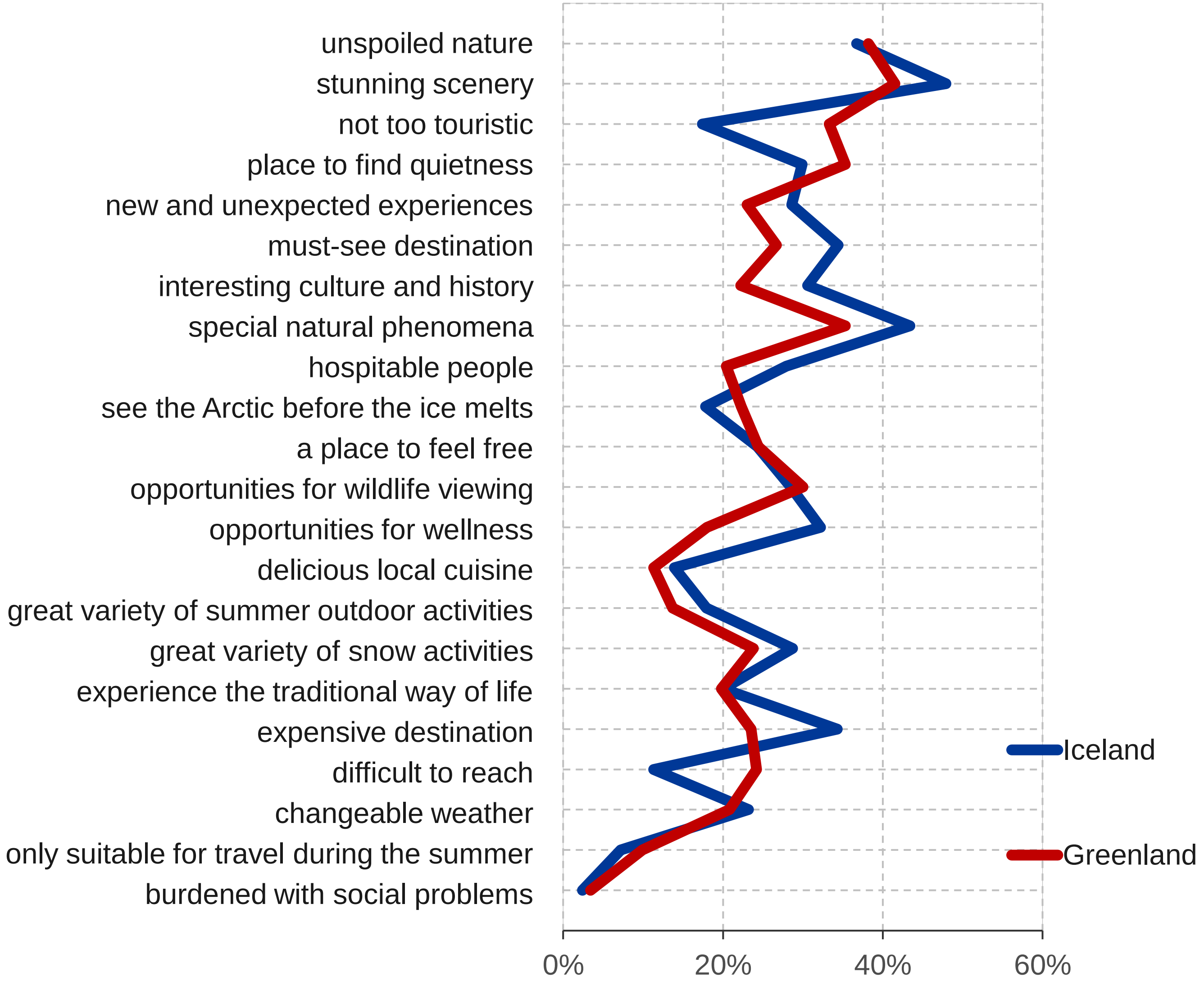
Image of Greenland in the British population: Depending on the knowledge of Greenland



- Higher knowledge leads to higher image figures at these factors (comparison “know a lot” vs. “no idea”):
  - must-see destination (+23%-pts.)
  - Hospitable people (+18%-pts.)
  - A place to feel free (+15%-pts.)
  - New unexpected experiences (+14%-pts.)
- The groups are closer to each other regarding aspects such as Greenland being not too touristic, an expensive destination, suitable only for summer, hard to reach, and having social problems.
- Persons WITH knowledge name on average 5.7 of the 21 characteristics in the question. Persons with a vague idea 6.0 and those with NO knowledge only name 3.4 characteristics.

Please tell me which of these characteristics do you think particularly apply to Greenland?
Basis: All respondents in the UK with knowledge (n=359), a vague idea (n=1,676) and with no idea and never heard of Greenland (n=873) of Greenland
Source: Visit Greenland market study UK 2023 by NIT

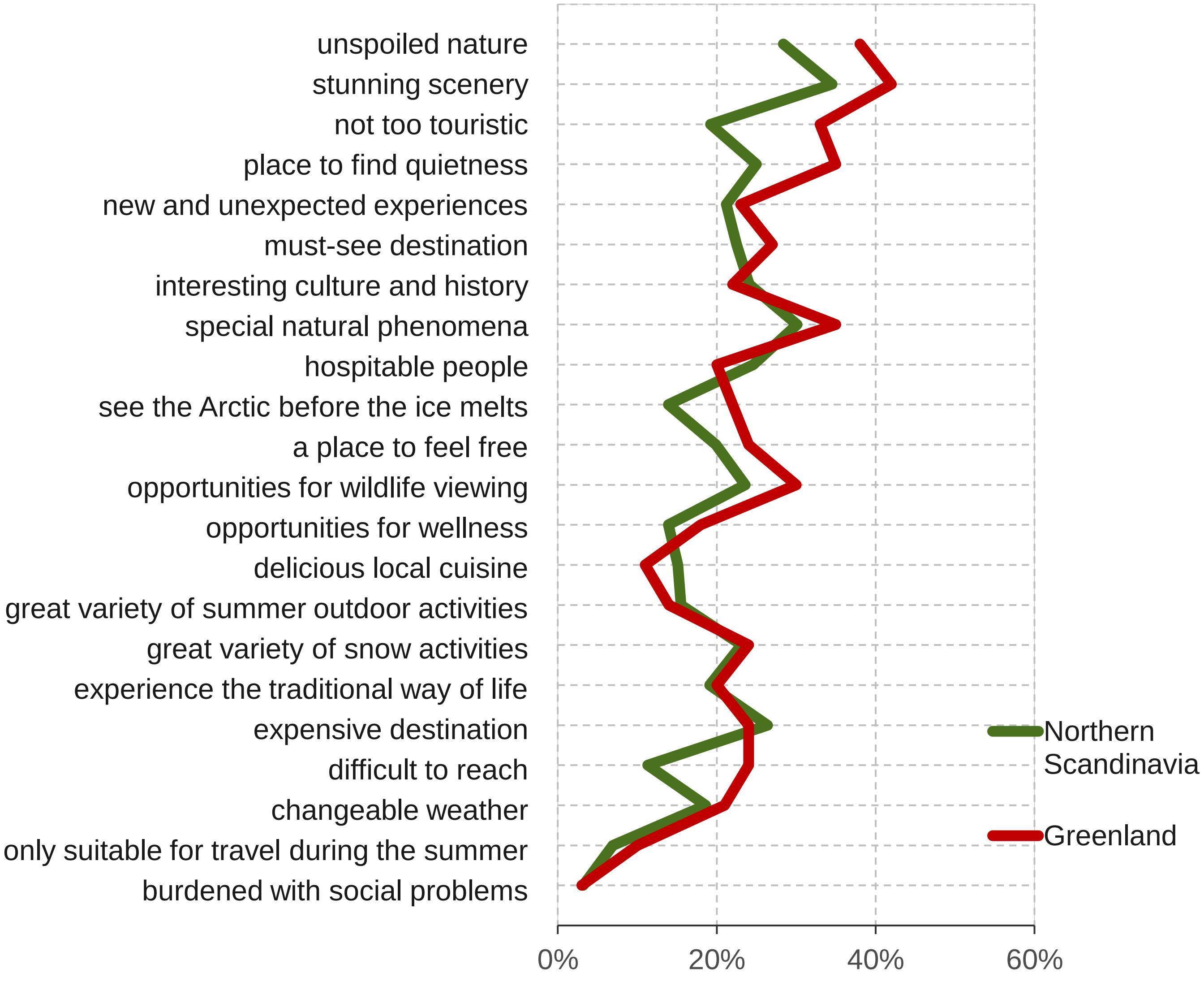
Benchmarking the image of Greenland and Iceland on the British market



- 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:
  - Not too touristic (+16%-pts.)
  - Difficult to reach (+13%-pts.)
- **More characteristic for Iceland** than for Greenland:
  - Wellness (+14%-pts.)
  - Expensive destination (+11%-pts.)

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

Benchmarking the image of Greenland and Northern Scandinavia on the British 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:
  - Not too touristic (+14%-pts.)
  - Difficult to reach (+13%-pts.)
  - Quietness (+10%-pts.)
  - Unspoiled nature (+10%-pts.)
- **More characteristic for Northern Scandinavia** than for Greenland:
  - Hospitable people (+5%-pts.)
  - Delicious local cuisine (+4%-pts.)

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

To learn 2:
Image of Greenland as a holiday destination

Knowledge of Greenland in the UK

- 12% of the population heard or read a lot about Greenland, 58% have only a vague idea and 28% know the country only by name. A very small minority of 2% has never heard of Greenland. For the potential travellers to Greenland, the share of those knowing a lot about Greenland increases by 16%-pts compared to the general population.

Image Greenland in the UK:

- The key image factors of Greenland in British population are: stunning scenery, unspoiled nature, a place to fiend quietness, special natural phenomena and not too touristic.
- Greenland is not famous for being only suitable for travelling in the summer, its delicious local cuisine, summer outdoor activities, opportunities for wellness and living the traditional way of life.
- Persons in the UK name on average 5.2 of the 21 characteristics in the question.
- Persons WITH interest to travel to Greenland consider it much more to be a must-see destination, to have interesting culture/history, new and unexpected experiences, summer outdoor activities and hospitable people. Persons with interest to travel to Greenland name on average 6.3 of the 21 characteristics in the question. Persons with NO interest name 5.0 characteristics.
- Comparing the image depending on the knowledge of Greenland, higher knowledge leads to higher image figures of most nature and cultural topics. Persons WITH knowledge name on average 5.7 of the 21 characteristics in the question while those with NO knowledge only name 3.4 characteristics.

Image benchmarking in the UK: Greenland and competitors

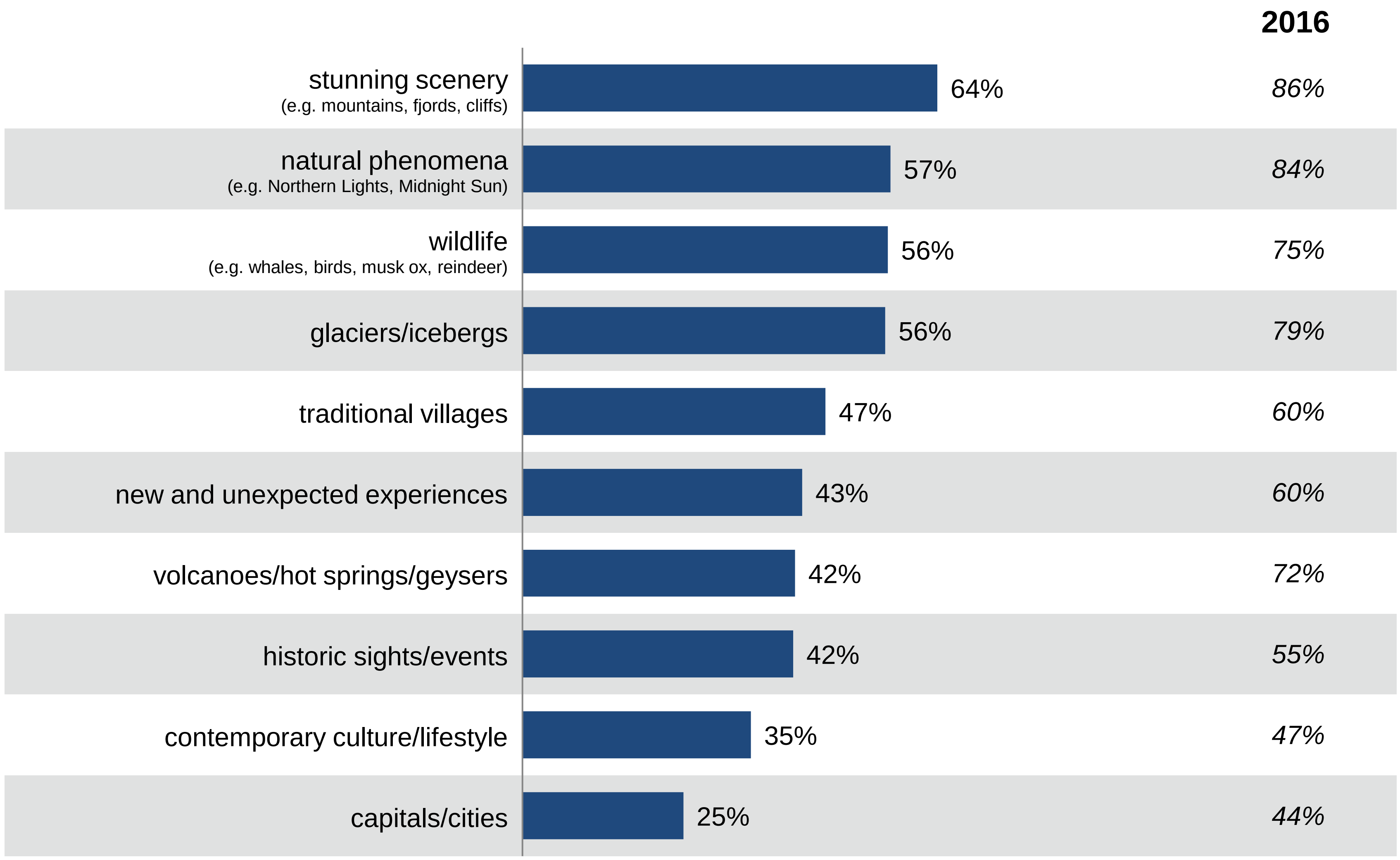
- When benchmarking the images of Greenland, Iceland and Northern Scandinavia, we find that stunning scenery, unspoiled nature and natural phenomena are important image factors in all those destinations.
- Greenland is sticking out over its two competitors regarding the following image characteristics: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

- The results about the image of Greenland in the UK 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

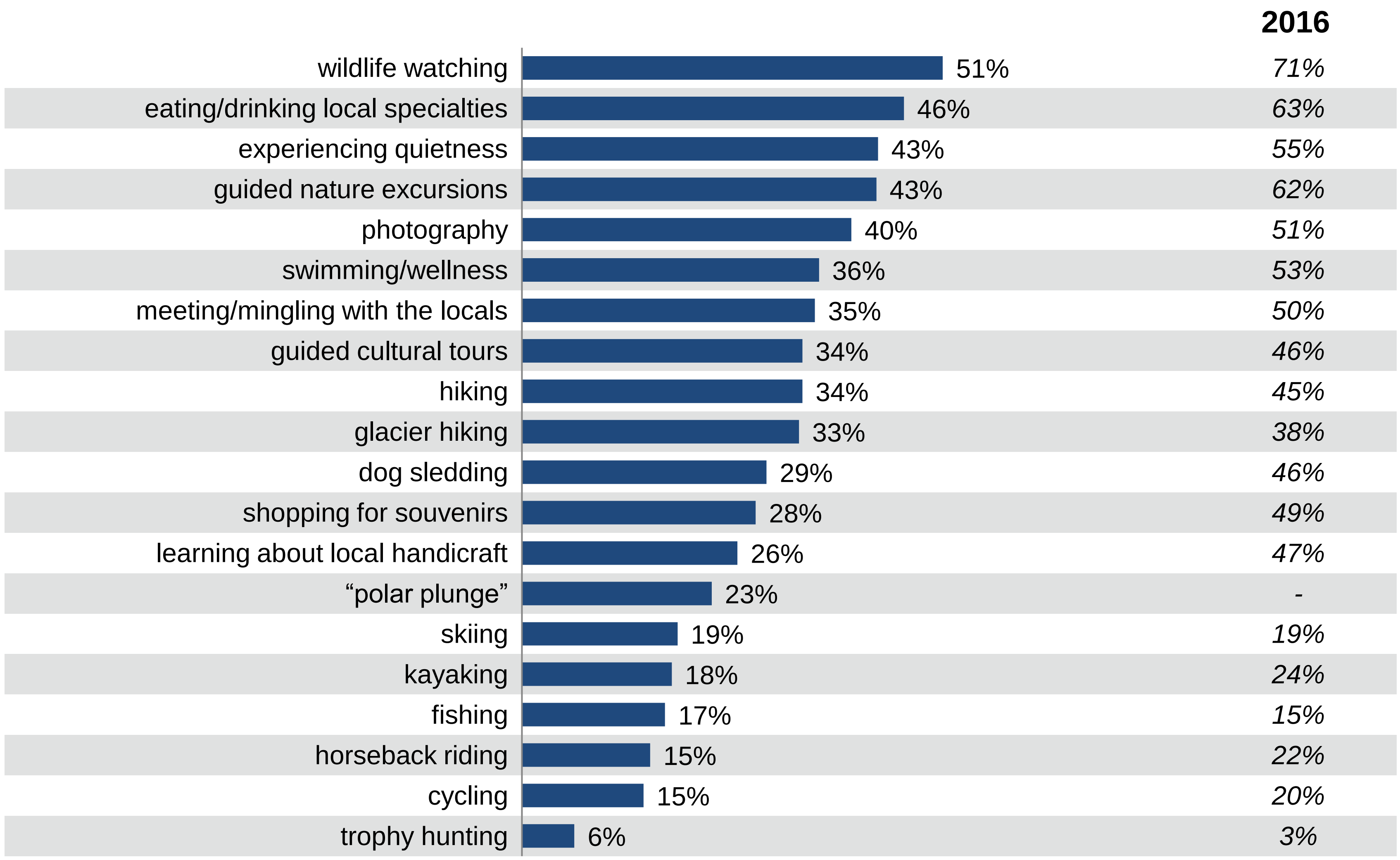
Potential travellers to Greenland: Preferred holiday experiences in Greenland



- For potential Greenland travellers in the UK it is most important to experience the stunning scenery, natural phenomena, the wildlife and glaciers/icebergs.
- Contemporary lifestyle and cities are at the bottom of the ranking – but with figures of still around 30%.
- On average 4.7 of the 10 aspects are of interest for potential Greenland travellers in the UK.
- Compared to 2016, the figures for all experiences are much lower now.

When thinking about travelling to Greenland what would you like to see/experience?
Basis: Potential travellers to Greenland from the UK (n=540)
Source: Visit Greenland market study UK 2023 by NIT, Visit Greenland/Air Greenland market study UK 2016 by NIT

Potential travellers to Greenland: Preferred holiday activities in Greenland



» The most sought-after activities in Greenland by potential travellers from the UK are wildlife watching, eating/drinking local specialties, experiencing quietness and photography.

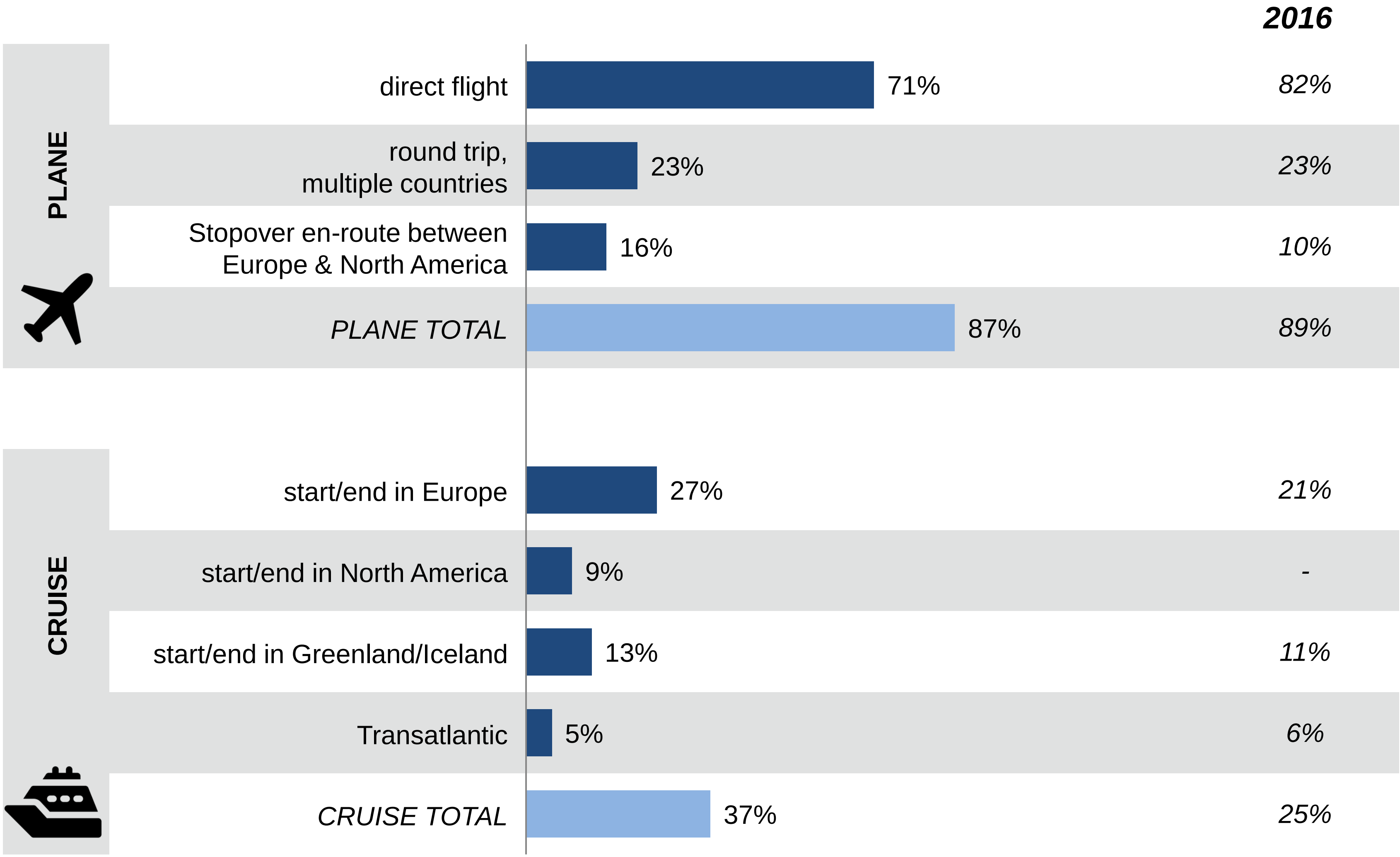
» Potential travellers from the UK named on average 5.9 activities as interesting to them, while the potential travellers of 2016 named on average 7.7 activities.

» Compared to 2016 this means a drop in shares for most activities and also a slight change of the ranking.

» Figures for some “niche” activities such as skiing or fishing have remained comparatively stable.

Which of the following activities would you like to do when travelling to Greenland?
Basis: Potential travellers to Greenland from the UK (n=540)
Source: Visit Greenland market study UK 2023 by NIT, Visit Greenland/Air Greenland market study UK 2016 by NIT

Potential travellers to Greenland: Preferences about getting to Greenland

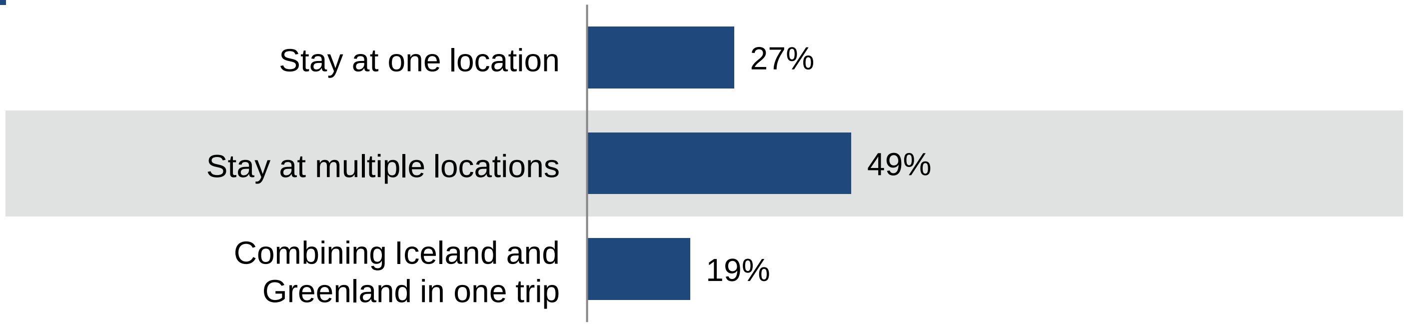


- In total, 87% of the potential guests in the UK would prefer the **plane** to travel to Greenland
- In detail, 71% prefer direct flights to Greenland; 23% want to visit Greenland during a multi country air trip and 16% as a stop between Europe and North America.
- Compared to 2016 fewer people prefer direct flights while the proportion of those interested in a round trip with multiple flights has remained stable (23%).
- 37% of the potential guests in the UK 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 2016, this means more interest for cruises in general and for cruises from/to European ports.

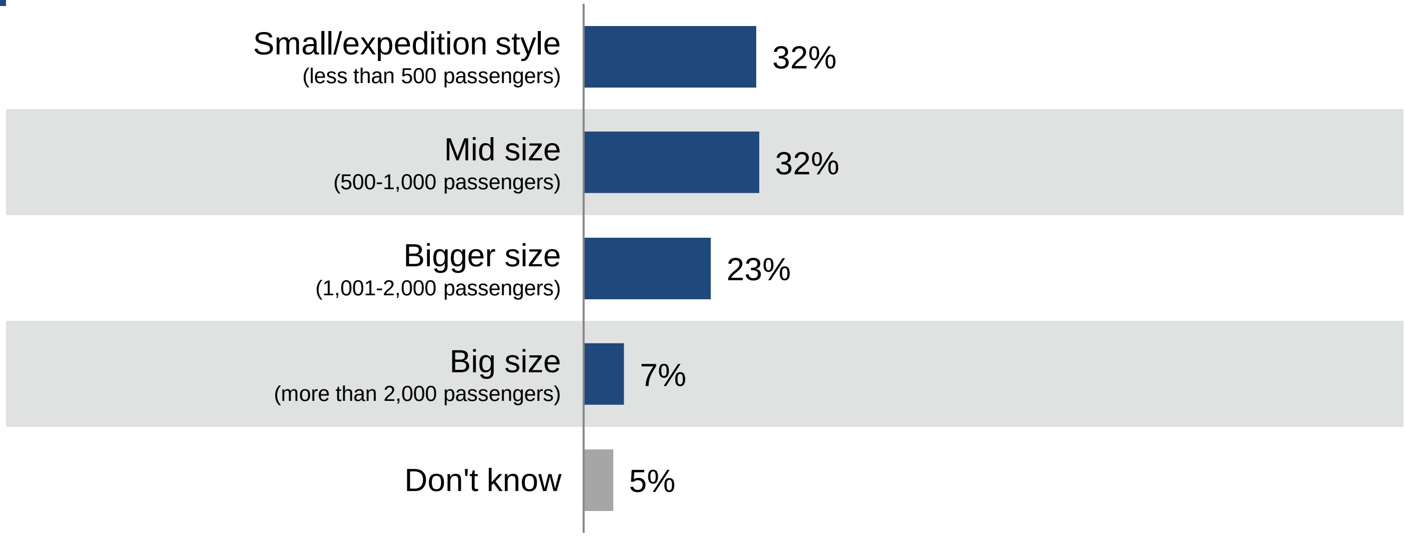
How would you like to travel to Greenland?
Basis: Potential travellers to Greenland from the UK (n=540)
Source: Visit Greenland market study UK 2023 by NIT, Visit Greenland/Air Greenland market study UK 2016 by NIT

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

Travel by plane



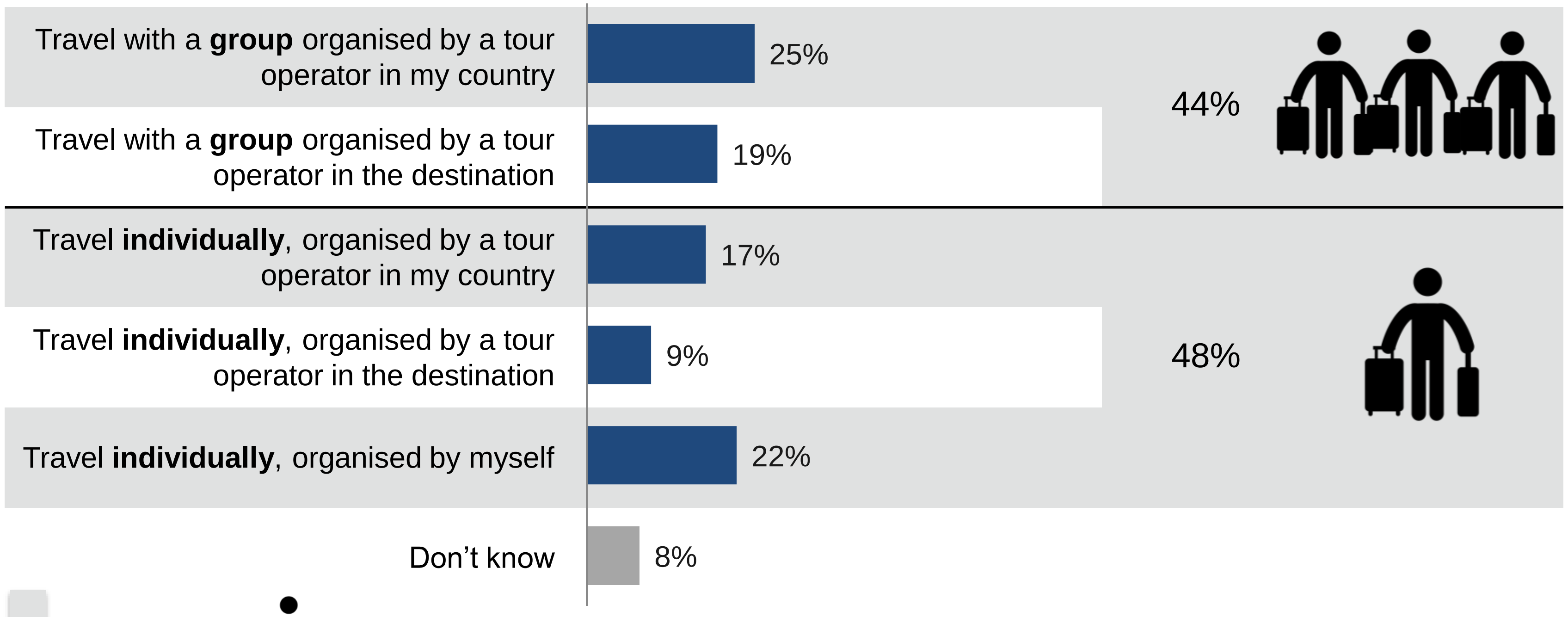
Travel by cruise

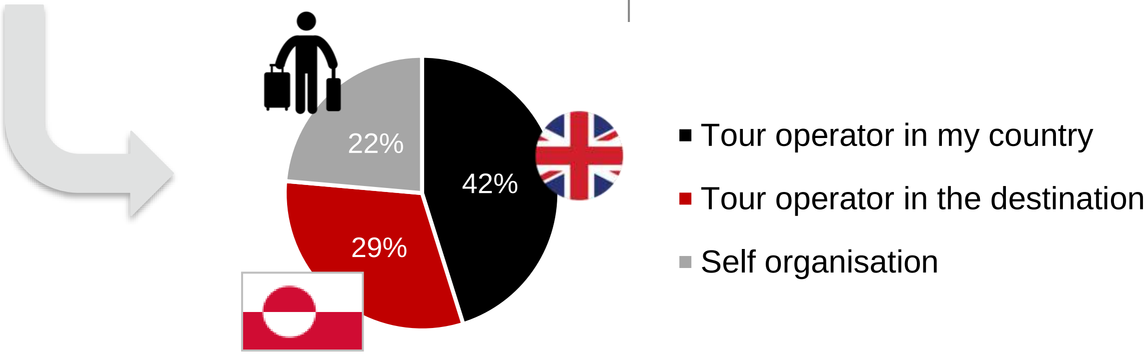


- Among the potential **plane** travellers (direct or with stop over), 49% prefer visiting multiple locations while in Greenland. 27% would like to stay at one location in Greenland and 19% can imagine combining Iceland and Greenland in one trip.
- Among the potential **cruise** travellers, 32% each prefer a mid sized ship with 500 to 1,000 passengers or an even smaller or expedition style ship with less than 500 passengers. But also 23% are interested in a bigger sized ship with up to 2,000 passengers and only a minority of 7% would like 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 the UK that prefer going to Greenland by plane with direct flight or stop over (n=423) and by cruise (n=202)
Source: Visit Greenland market study UK 2023 by NIT

Potential travellers to Greenland: Preferences about travel organisation to Greenland

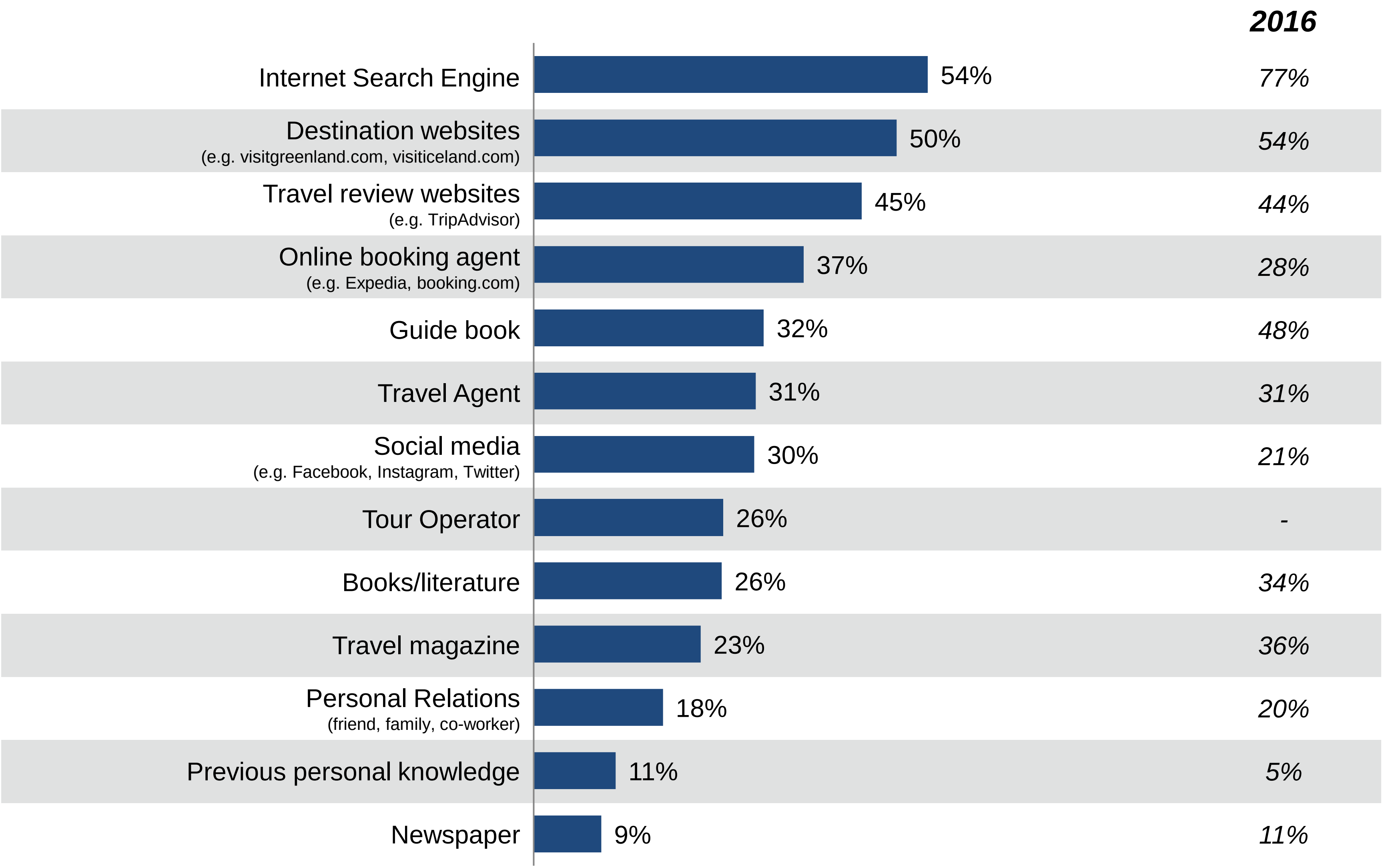




- Among the potential **plane** travellers, the slight majority prefers to travel individually (48%), either organised by a tour operator in the UK (17%), a tour operator in Greenland (9%) or by themselves (22%).
- 44% prefer travelling with a group.
- Overall, most British plane travellers prefer the organisation of their Greenland trip by an operator in the UK.

How would you like to organize your trip to Greenland?
Basis: Potential travellers to Greenland from the UK that prefer going by plane (n=470)
Source: Visit Greenland market study UK 2023 by NIT

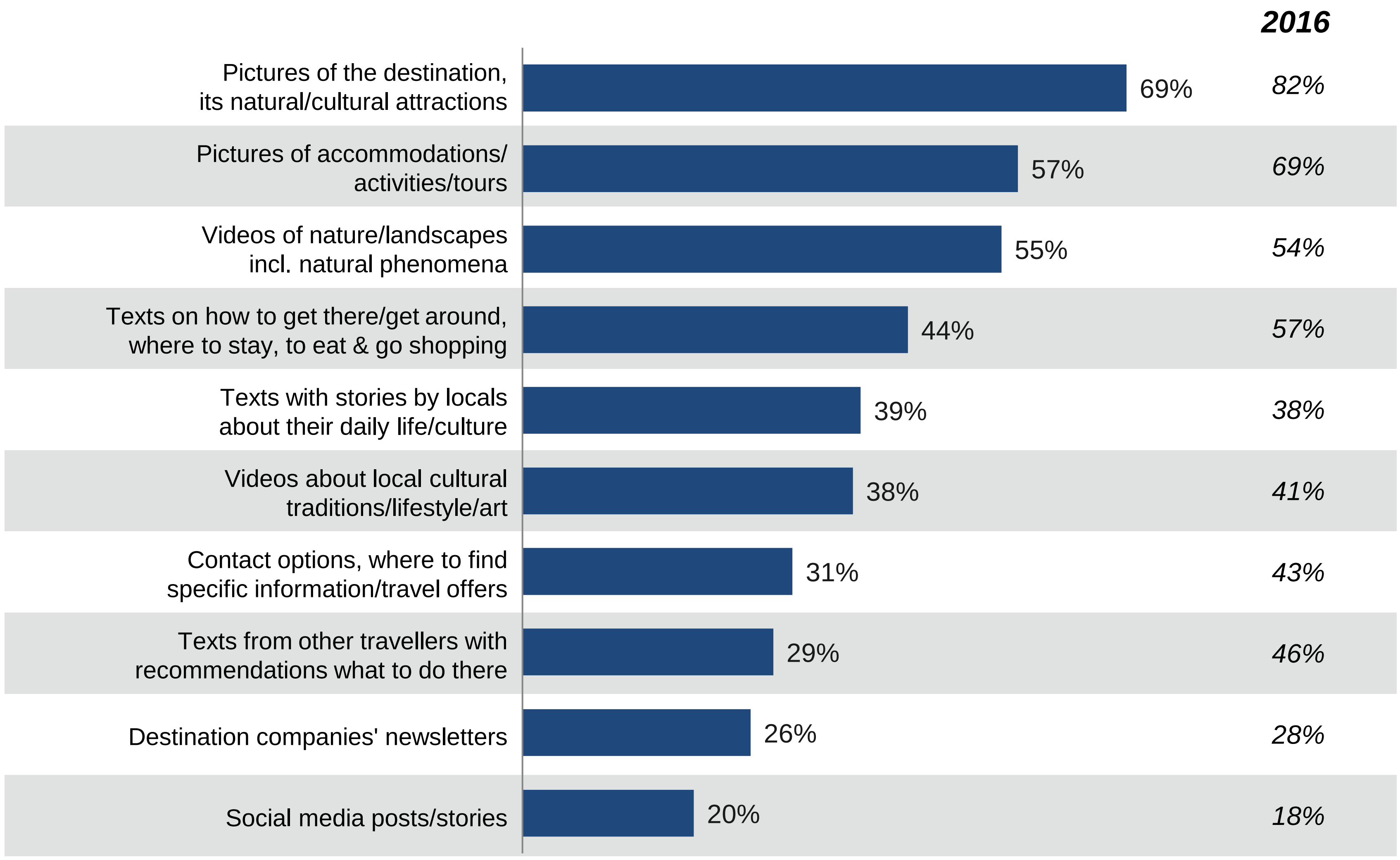
Potential travellers to Greenland: Preferred sources for inspiration & information



- The most popular sources for information and inspiration of potential travellers in the UK when planning a trip to Greenland are internet search engines (54%) and destination websites (50%).
- Followed by travel review websites (45%), online booking agents (37%), guide books (32%), travel agents (31%) and social media (30%).
- Compared to 2016 online booking agents and social media (each +10%-pts.) became more relevant for the search of inspiration and information. While classic offline sources, such as travel magazines (-13%-pts.) and books/literature (-8%-pts.) became less relevant. Despite still being at the top, the figure for internet search engines also dropped significantly (-23%-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 the UK (n=540)
Source: Visit Greenland market study UK 2023 by NIT, Visit Greenland/Air Greenland market study UK 2016 by NIT

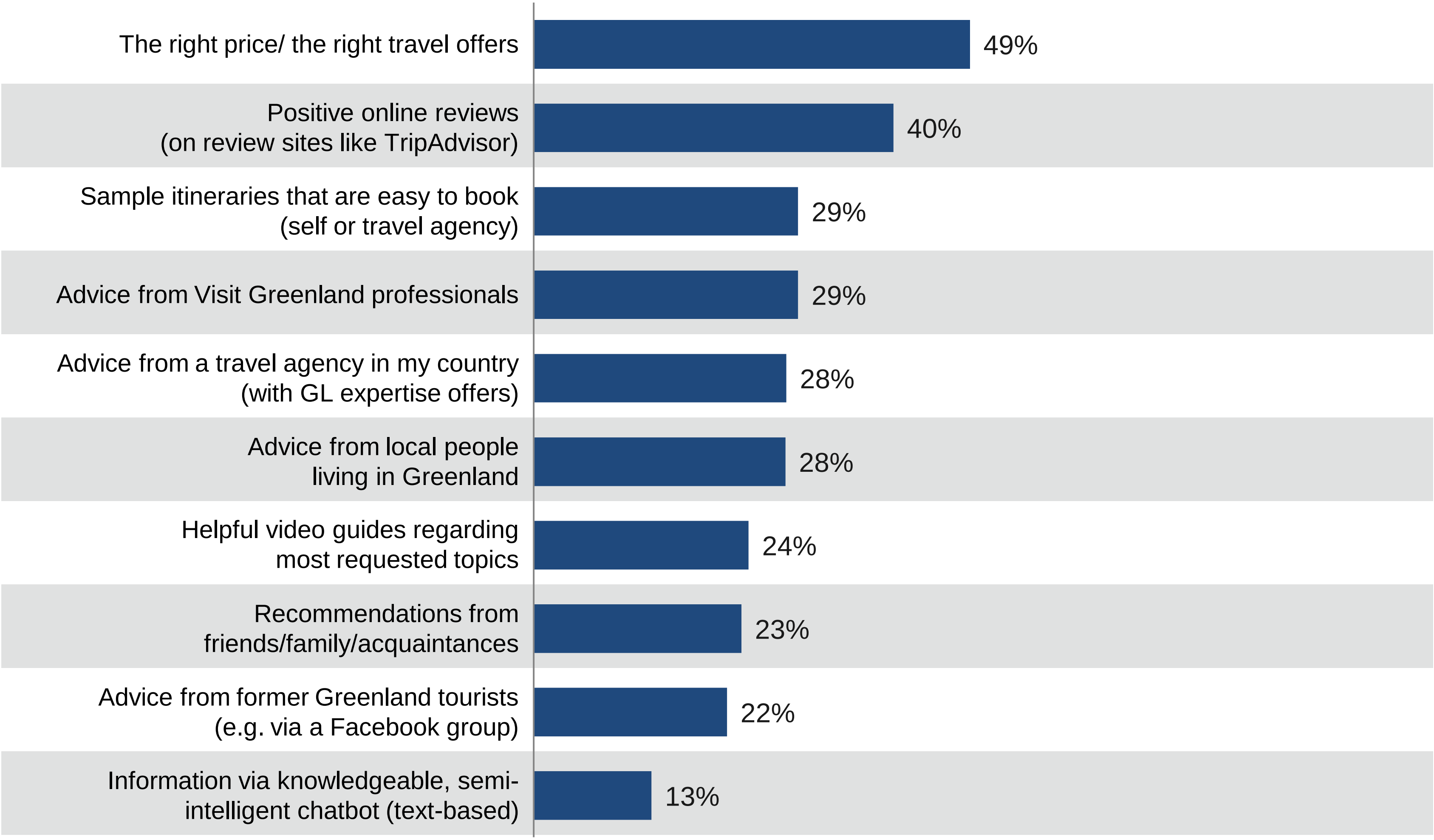
Potential travellers to Greenland: Preferred kind of online content



- When asked for their preferred kind of online content, most potential Greenland guests in the UK favour destination images or 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 (26%) or social media posts (20%).
- However, compared to results in 2016 e.g. texts told by other travellers and contact options but also texts on how to get around became less important.

Which kind of content do you like to find when looking for online information about Greenland?
Basis: Potential travellers to Greenland from the UK (n=540)
Source: Visit Greenland market study UK 2023 by NIT, Visit Greenland/Air Greenland market study UK 2016 by NIT

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

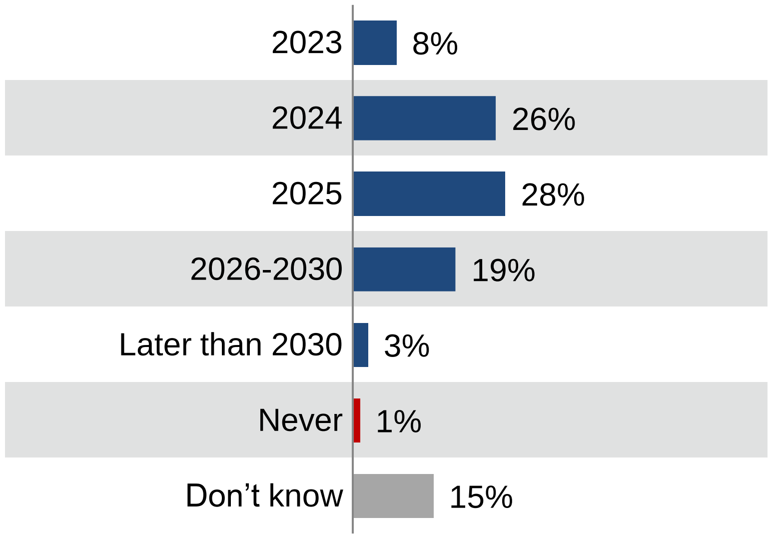


- This question was added to find out more about the very last step within the travel decision process; the results show the clear dominance to find the “right” product with the “right” price.
- Following, but on a lower level of approval, are positive online reviews.
- Sample itineraries, Advice from Visit Greenland professionals, a travel agency in the UK and from local people living in Greenland are relevant for almost 30% of the potential travellers in the UK.
- Advice from former Greenland tourists ranked relatively low with 22% considering this as relevant final decisive input.
- The least relevant final decision input is information via knowledgeable, semi intelligent chatbots (13%).

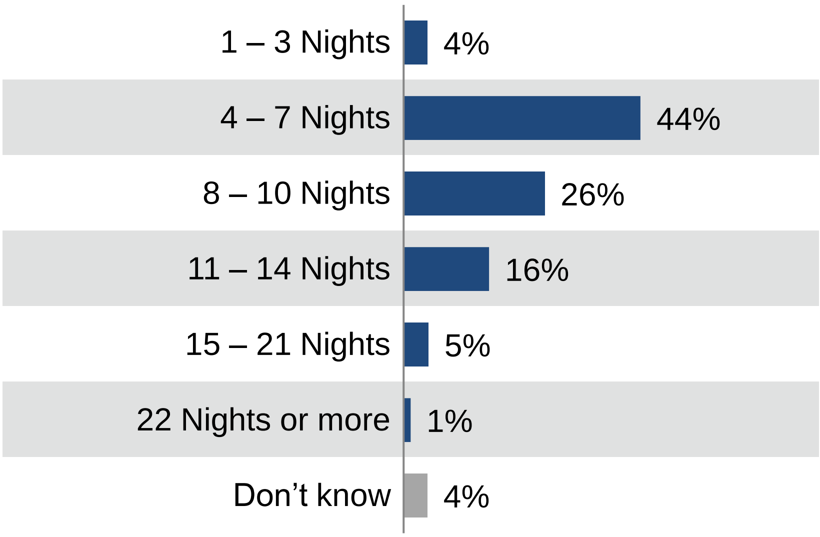
You have indicated that you would like to visit Greenland within the next 5 years. Please now imagine yourself being in a situation where you're almost ready to book, but still need the final decisive input. What kind of input would be most relevant for you?
Basis: Potential travellers to Greenland from the UK (n=540)
Source: Visit Greenland market study UK 2023 by NIT

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

Visit (next time)



Duration

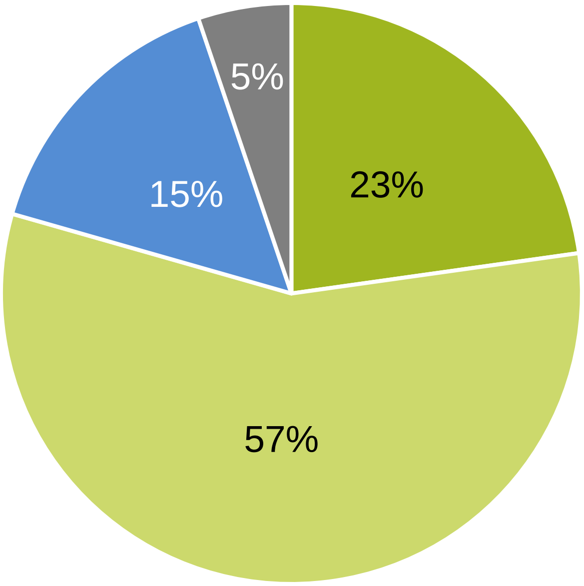


Preferred months

- The survey also asked details about the **year** when the trip to Greenland is likely to come true: 8% of the potential travellers plan on visiting Greenland this year (2023), 26% in 2024, 28% in 2025 and 19% in 2026 or later.
- When asked about **how much time** they would like to spend in Greenland 42% of the travellers want to spent between one and two weeks, nearly half of the travellers (48%) one week or less and the rest more than two weeks.
- When asked about the preferred **months** to travel to Greenland, most potential travellers prefer going to Greenland in July/August/September or April/May/June (54%).

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 the UK (n=540)
Source: Visit Greenland market study UK 2023 by NIT

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

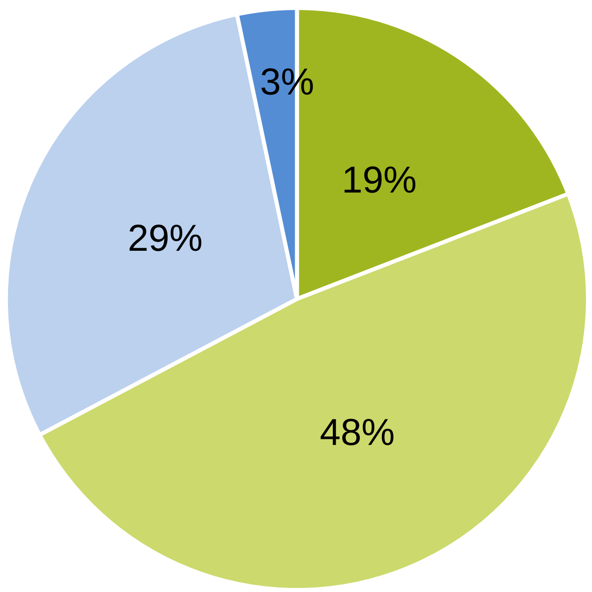


Sustainability will be **critical** when deciding for a specific offer.
Sustainability will be **one of several aspects** when deciding for a specific offer.
Sustainability will **not play a big role** when deciding for a specific offer.
Sustainable travel is **not something that interests me in general**.

- We asked the potential travellers how crucial sustainability is when planning a trip to Greenland.
- 23% state that sustainability will be the critical deciding factor and 57% consider it one of several aspects influencing the decision for a specific offer. Only a small share (15%) do not really consider sustainability and even less (5%) 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 the UK (n=540)
Source: Visit Greenland market study UK 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.
- Nearly half of the potential travellers (48%) consider themselves as quality-oriented, followed by 29% that are more price-oriented when travelling to Greenland.
- 19% 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 3% 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 the UK (n=540)
Source: Visit Greenland market study UK 2023 by NIT

To learn 3:
Greenland product preferences

Experiences:

- » For potential Greenland travellers in the UK it is most important to experience the stunning scenery, natural phenomena, wildlife and glaciers/icebergs.
- » This ranking is nearly the same as in 2016. However, the figures for all experiences are lower now than they have been in 2016.

Activities:

- » The most sought-after activities in Greenland by potential travellers from the UK are wildlife watching, eating/drinking local specialties, experiencing quietness and guided nature excursions. Potential travellers from the UK named on average 5.9 activities as interesting to them, while the potential traveller of 2016 named on average 7.7 activities.
- » Compared to 2016 this means a drop in shares for most activities and also a slight change of the ranking. Figures for "niche" activities such as skiing or fishing have remained comparatively stable.

Getting there/around/organisation:

- » Most potential Greenland travellers in the UK would prefer direct flights into Greenland and staying at multiple locations when being in Greenland. There is a share of 37% of the potential guests in the UK who want to visit Greenland as a cruise destination, most of them would prefer travelling with a small/expedition sized ship (less than 500 passengers) or a mid sized ship (500 to 1,000 passengers).

Information sources:

- » Internet search engines is the most popular sources for information of potential travellers in the UK when planning a trip to Greenland. Compared to 2016 classic offline sources became less relevant.

Online content:

- » When asked for their preferred kind of online content, most potential Greenland guests in the UK favour destination images or videos 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. Following, but on a lower level of approval, are positive online reviews or sample itineraries.

Potential time of travel, duration and preferred months

- » 8% of the potential travellers plan on visiting Greenland this year (2023), 26% in 2024, 28% in 2025 and 19% later than 2026. 70% of the travellers would like to spend between one and two weeks. Most travellers prefer going between April and September.

Importance of price and quality

- » 48% of the potential travellers are more quality-oriented while 29% are more price-oriented when travelling to Greenland. A smaller share of 19% pays no attention to the price at all and 3% 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	2016
Male	*49%*	49%	*51%*
Female	*51%*	51%	*49%*

Age

	population	Potential travellers to Greenland	2016*
18-29 years	*21%*	30%	*30%*
30-39 years	*19%*	22%	*23%*
40-49 years	*20%*	22%	*18%*
50-59 years	*18%*	15%	*16%*
60-74 years	*22%*	11%	*14%*
Average age in years	*45.2*	*40.1*	*40.4*

» Potential Greenland travellers in the UK are evenly distributed between both **sexes**.

» 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 60 to 74 years old travellers is the smallest.

» The average age of potential travellers to Greenland from the UK is 40.1 years.

» The comparison to 2016 shows nearly the same share of very young people and in the group of 50-59 years. The group of 60-74 years had a higher share in 2016.

Basis: All respondents in the UK (n=3,000), potential travellers to Greenland from the UK (n=540); Source: Visit Greenland market study UK 2023 by NIT, Visit Greenland/Air Greenland market study UK 2016 by NIT; *age structure from 16 to 70

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

Size of household

	population	Potential travellers to Greenland	2016
1 person	*19%*	15%	*16%*
2 people	*37%*	30%	*35%*
3 people	*20%*	25%	*20%*
4 people	*16%*	19%	*29%* (4 and more)
5 people or more	*9%*	11%	

Children in household

	population	Potential travellers to Greenland
No children < 18 years in household	*59%*	48%
Yes, children <18 years in household	*41%*	52%
Children aged 0-5 years	*15%*	20%
Children aged 6-13 years	*24%*	30%
Children aged 14-17 years	*14%*	19%

» The biggest group of potential travellers to Greenland in the UK lives in households of two people.

» Half of the potential travellers to Greenland from households with 2 or more people live with children in the household. This is a 10%-pts. higher share than in the British population. 20% of these potential traveller 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 is considerably higher than in the population.

Basis: All respondents in the UK (n=3,000, with 2 or more people in household n=2,441), potential travellers to Greenland from the UK (n=540, with 2 or more people in household n=460); Missing % to 100: No answer
Source: Visit Greenland market study UK 2023 by NIT, Visit Greenland/Air Greenland market study UK 2016 by NIT

Potential travellers to Greenland: Demographics III (education)

Education

	population	Potential travellers to Greenland	2016
Primary/ secondary school	*5%*	3%	*7%*
GNVQ/GSVQ/GCSE/SCE standard	*20%*	15%	*18%*
NVQ1/NVQ2	*6%*	6%	*5%*
NVQ3/SCE higher grade/advances GNVQ/GCE A/AS or similar	*22%*	21%	*23%*
NVQ4/HNC/HND/Bachelor‘s degree or similar	*33%*	36%	*33%*
NVQ5 or post-graduate diploma	*13%*	17%	*15%*
Other	*1%*	2%	-

- Regarding their formal education, we find that potential Greenland travellers in the UK have a similar education level as the average British population.
- More than half of the potential travellers from the UK have at least a Bachelor degree or similar.
- However, the comparison of 2016 and 2023 shows that the share of lower educated travellers has decreased over the years, while the share of those with higher education increased.

Basis: Total population (n=3,000) vs. potential travellers to Greenland from the UK (n=540)
Source: Visit Greenland market study UK 2023 by NIT, Visit Greenland/Air Greenland market study UK 2016 by NIT

Potential travellers to Greenland: Demographics IV (income)

Household net income per year

	population	*Potential travellers to Greenland*	***2016***
up to 9,999 pounds	*7%*	7%	*10%*
10,000 – 19,999 pounds	*13%*	11%	*16%*
20,000 – 24,999 pounds	*11%*	10%	*12%*
25,000 – 34,999 pounds	*17%*	20%	*21%*
35,000 – 44,999 pounds	*14%*	11%	*14%*
45,000 – 54,999 pounds	*12%*	15%	*10%*
55,000 pounds or more	*19%*	21%	*18%*
No answer	*7%*	5%	-

- Looking at the average yearly net income per household, the biggest groups amongst potential travellers to Greenland earns 25,000 to 34,999 pounds and 55,000 pounds an more.
- Yet. , the share of groups with income higher than 25,000 pounds is bigger for the potential travellers than in the population
- In comparison to 2016, we observe a growth in the income segments of 45,000+ pounds and a decline in the segments below 25,000 pounds.

Basis: Total population (n=3,000) vs. potential travellers to Greenland from the UK (n=540); Source: Visit Greenland market study UK 2023 by NIT, Visit Greenland/Air Greenland market study UK 2016 by NIT

Potential travellers to Greenland: Demographics V (regions)

Regions

	population	*Potential travellers to Greenland*	***2016***
East Midlands	*7%*	9%	*6%*
East of England	*9%*	9%	*8%*
Greater London	*13%*	17%	*17%*
North East England	*4%*	4%	*3%*
North West England	*11%*	10%	*10%*
Northern Ireland	*3%*	3%	-
Scotland	*9%*	6%	*8%*
South East England	*14%*	14%	*15%*
South West England	*9%*	7%	*11%*
Wales	*5%*	4%	*6%*
West Midlands	*9%*	8%	*8%*
Yorkshire and the Humber	*8%*	10%	*9%*

- The regional spread of potential travellers to Greenland in the UK shows a slight concentration in Greater London.
- The comparison of 2016 and 2023 shows a quite stable regional structure of the potential travellers to Greenland from the UK.

Basis: Total population (n=3,000) vs. potential travellers to Greenland from the UK (n=540);
Source: Visit Greenland market study UK 2023 by NIT, Visit Greenland/Air Greenland market study UK 2016 by NIT

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

- Gender: Potential Greenland travellers are almost evenly divided between both sexes.
- 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 60 to 74 years old travellers is the smallest. The average age of potential travellers to Greenland from the UK is 40.1 years.
- Size of household and children in household: The biggest group of potential travellers to Greenland lives in households of two people. Half of the potential travellers in households with 2 and more persons live with children in the household. This is a much higher share than in the general population.
- Education: Regarding their formal education, we find that potential travellers in the UK have a similar education structure to the population. Comparison to 2016 shows that the share of lower educated travellers has decreased and those with higher education has increased.
- Annual household net income: The biggest groups amongst potential travellers to Greenland earns between 25,000 and 34,999 pounds and 55,000 pounds or more. The share of groups with income above 45,000 pounds is higher than in the population. This segment has increased since 2016.
- Regional structure: The regional spread of potential travellers to Greenland in the UK shows a slight concentration in Greater London. The comparison of 2016 and 2023 shows a quite stable regional structure of the potential travellers to Greenland from the UK.

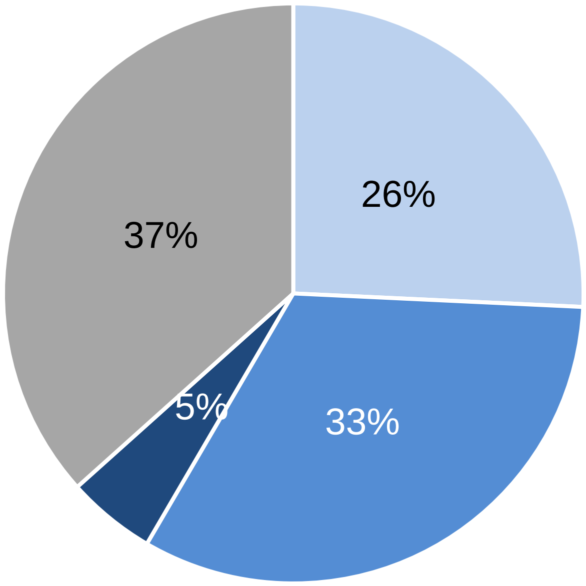
- In most regards, the demographic profiles of potential Greenland travellers in the UK do not differ much from the population. This means you do not have to take peculiarities into account when addressing them.
- On the other hand, the small but noticeable differences may show opportunities for specific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

5. Segmentation: Adventure & Sustainability

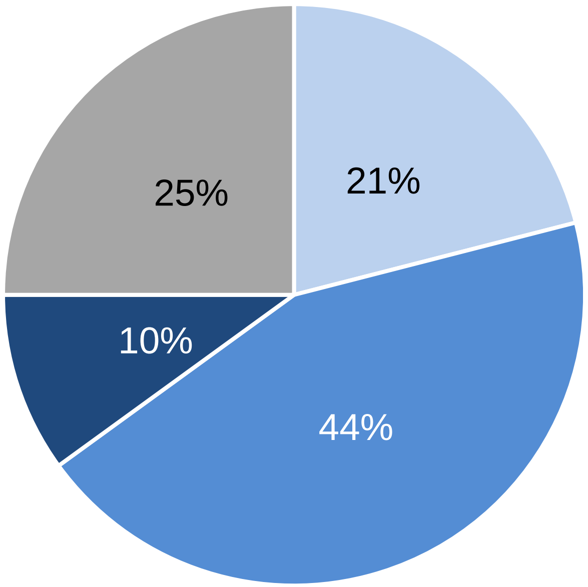
Photo by Mads Pihl - Visit Greenland

Visit Greenland adventurer segments

population



Potential travellers to Greenland



- 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 the share of non-adventurers (those not fitting with the definitions of the segments) is higher in the population (37%) than for potential travellers.
- With the potential travellers, 21% belong to the “soft adventurers”, 44% to the “immersive” and 10% to the “ultimate adventurers”.

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)

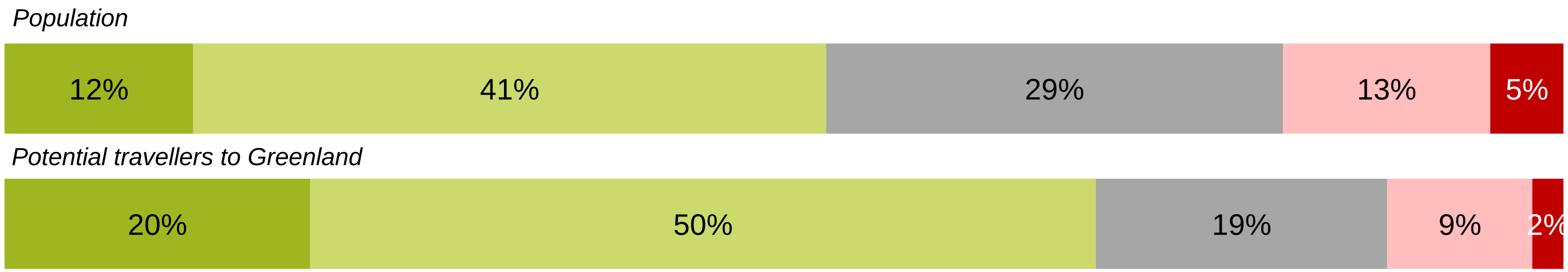
Ultimate Adventurer
(a full 'deep dive' into nature and/or physical challenges, and/or 'living like a local' to have as culturally authentic experiences as possible)

None of the VG adventure segments

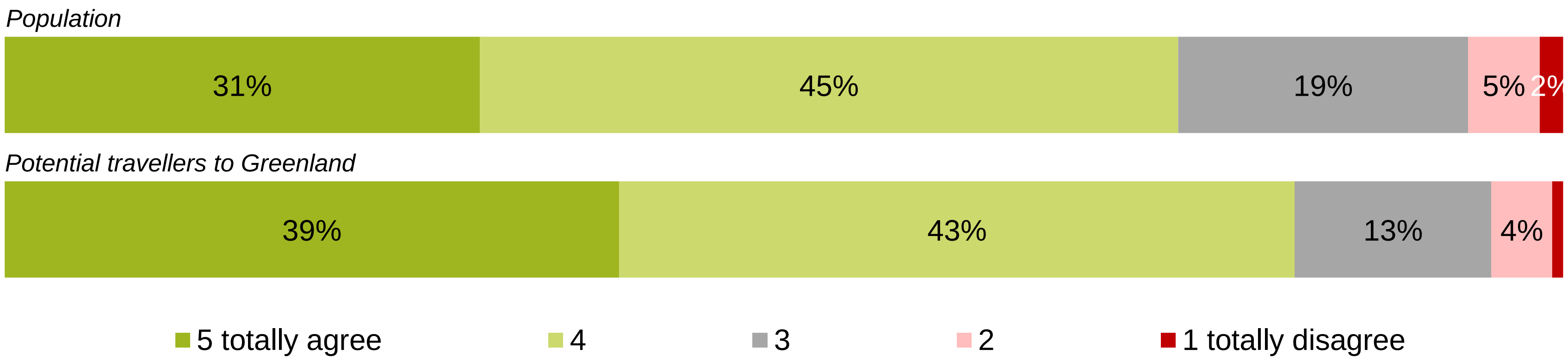
If you had to identify as one of the following tourist types, which one would it be?
Basis: All respondents in the UK (n=3,000), potential travellers to Greenland from the UK (n=540); Source: Visit Greenland market study UK 2023 by NIT

Attitude towards sustainable travelling
(population vs. potential travellers)

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).



- 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 of the UK have a more pronounced attitude towards sustainability than the British population in general.
- 70% of the potential travellers prefer their holiday to be ecologically sound and more than 80% would like it to be socially acceptable. This share is a bit lower in the British 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 the UK (n=3,000) and potential travellers to Greenland in the UK (n=540)
Source: Visit Greenland market study UK 2023 by NIT

To learn 5: Segmentation: Adventure & Sustainability

<u>Adventurer segments</u>:

- Looking at the population in the UK, there is a high share of non-adventurers (those not fitting with the definitions of the segments) (37%), this is followed by the immersive adventurers (33%). One forth of the population (26%) are soft adventurers and only 5% consider themselves as ultimate adventurers.
- Looking at the potential Greenland travellers in the UK, the share of non-adventurers is 25%. The Immersive Adventurers are dominating with a share of 44%, followed by the soft adventurers with 21%. 10% 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, but lower shares of soft adventurers.

<u>Attitudes towards sustainability</u>

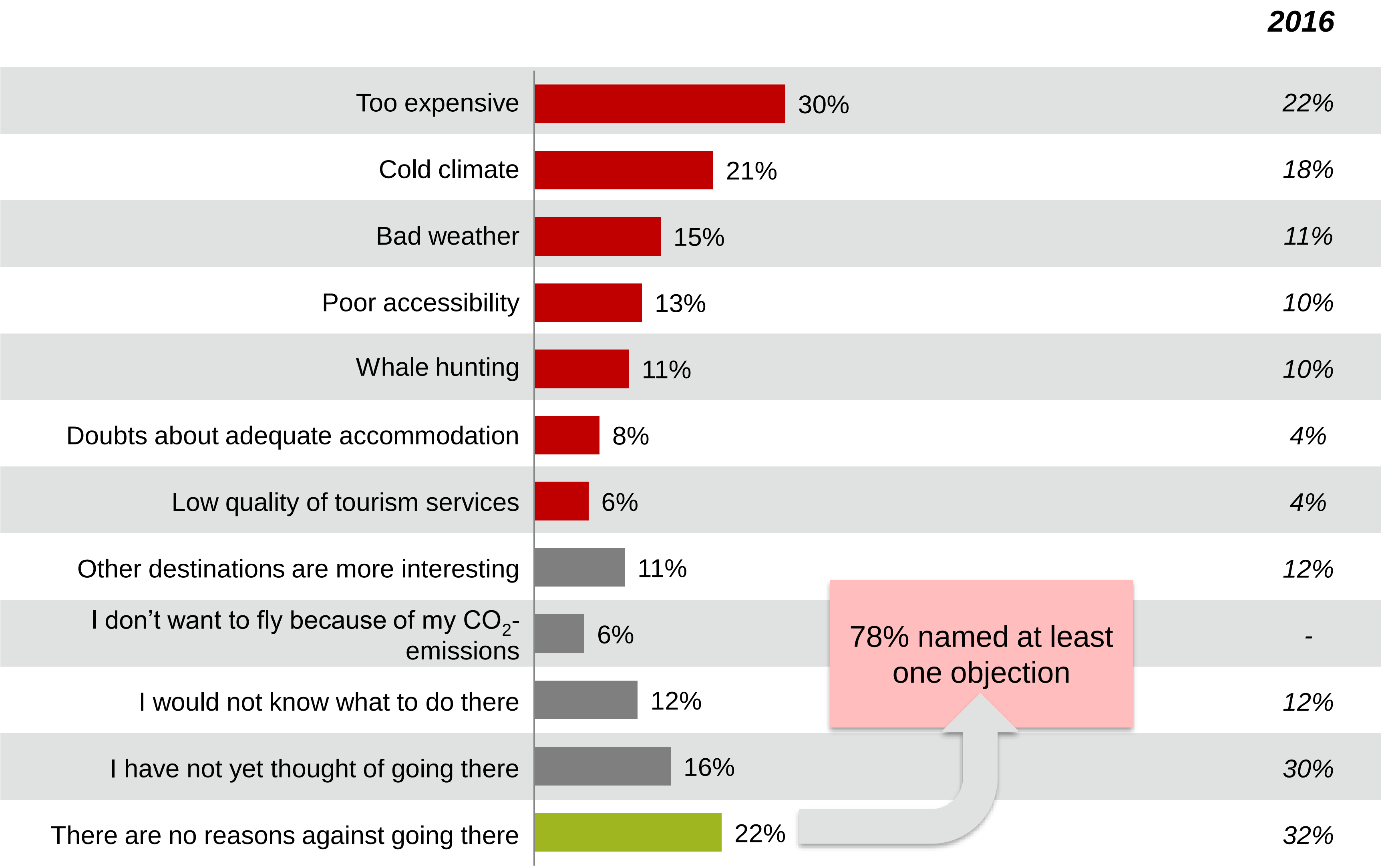
- Potential Greenland travellers of the UK have a more pronounced attitude towards sustainability than the British population in general.
- 70% of the potential travellers prefer their holiday to be ecologically sound and more than 80% would like it to be socially acceptable. This share is a bit lower in the British population overall.

- The Visit Greenland segmentation approach is on the one hand very helpful to further understand the potential Greenland travellers in the UK, 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

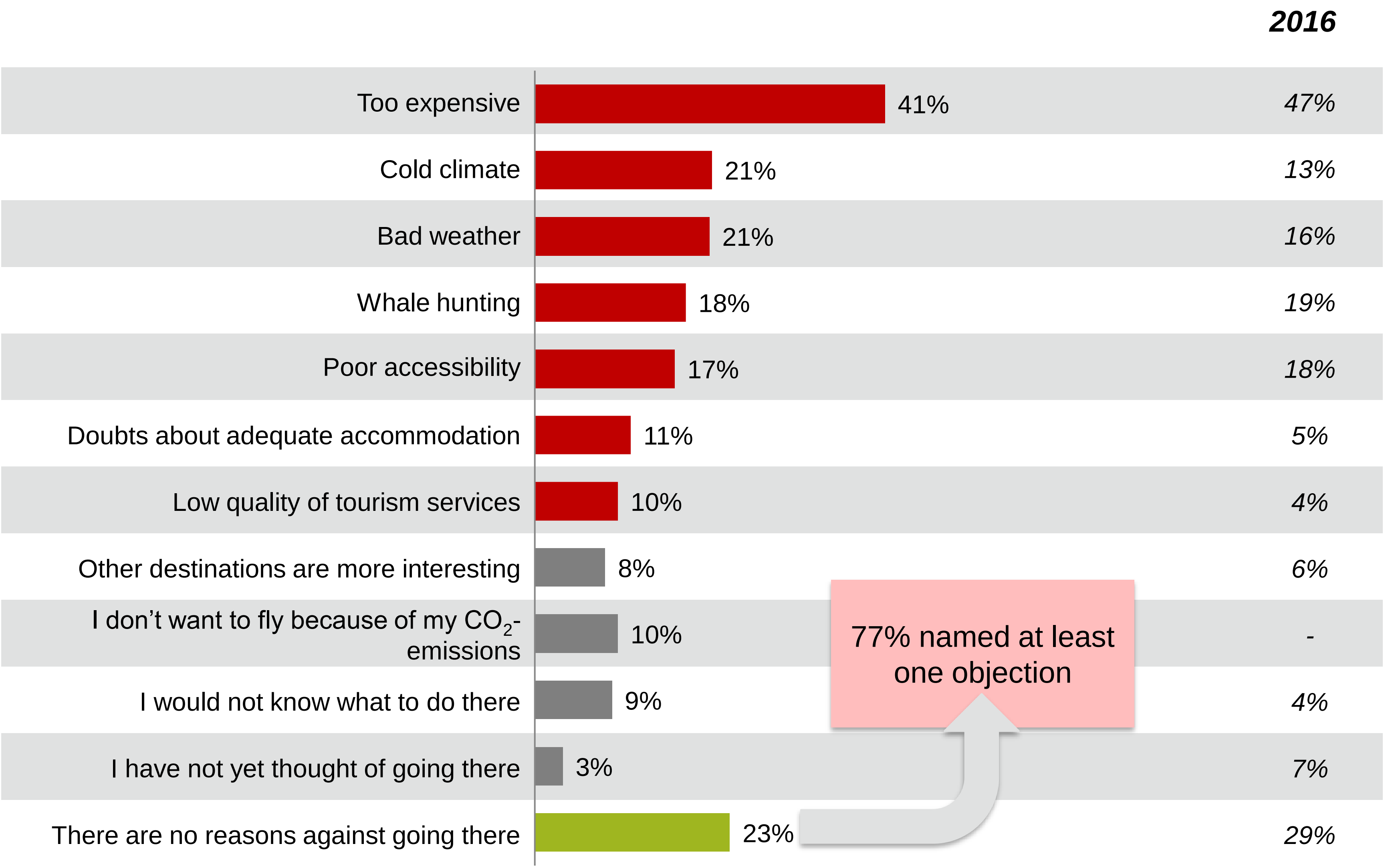
Reasons against travelling to Greenland (*population*)



- One of the final questions in the survey examines reasons against travelling to Greenland.
- The good news first: 22% of the British have no general objections to travel to Greenland. In turn, this means that 78% 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 for about every seventh of the British population.
- 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 (2016: Greenland, Faroe Islands, Iceland)?
Basis: All respondents in the UK (n=3,000)
Source: Visit Greenland market study UK 2023 by NIT, Visit Greenland/Air Greenland market study UK 2016 by NIT

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



- Even more important is to understand what stops those interested in travelling to Greenland from going there.
- Among the potential travellers in the UK nearly one quarter sees no reason to not travel to Greenland (23%). This indicates that even among the potential travellers to Greenland 77% have at least one objection against going there.
- For the rest the main barrier seems to be the price. 41% of the potential travellers consider Greenland "too expensive". This figure is much higher than in the population.
- Other important barriers are the cold climate, bad weather, whale hunting and poor accessibility.
- 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 in your opinion reasons against travelling to Greenland (2016: Greenland, Faroe Islands, Iceland)?
Basis: Potential travellers to Greenland in the UK (n=540);
Source: Visit Greenland market study UK 2023 by NIT,
Visit Greenland/Air Greenland market study UK 2016 by NIT

To learn 6: Reasons against travelling to Greenland

Population:

- 22% of the British have no general objections to travel to Greenland. Most important reasons against travelling to Greenland are the expected high costs, followed by the coldness. Bad weather and poor accessibility are also considerable reasons against travelling to Greenland for about every seventh of the British 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 the UK nearly one quarter sees no reason to not travel to Greenland (23%). For the rest the main barrier seems to be the price. 41% of the potential travellers consider Greenland “too expensive”. This figure is much higher than in the population. Other important barriers are the cold climate, bad weather, whale hunting and poor accessibility.
- 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 UK.
- 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"

» 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!

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