Positioning and potentials of Greenland on the German, British and US travel market

Full report

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Introduction and background of this study

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- Visit Greenland (VG) with the support of Air Greenland has commissioned the Institute for Tourism Research in Northern Europe (NIT) to conduct a market research study on the “Positioning and potential of Greenland on the German, the British and the US travel market”.
- The central aim is to get a thorough and complete picture on the volume, the structure, the attitudes and developments of the market potential of Greenland in the three markets, in order to provide a sound basis for the future strategic planning of the three destinations concerning their marketing efforts, product development and communication on this market.
- The results about the German market originate from a NATA financed study, coordinated between NIT and Visit Greenland. Basis for that study was an online survey with 4,000 interviews, representative for the German-speaking population in Germany aged 16-70 years.
- The studies in Great Britain and USA followed the same methodological approach (4,000 online interviews per market) using the same questionnaire (plus selected additional questions) as in the NATA survey, in order to be able to compare the results of the three markets.
- In Great Britain, the results are representative for the British population aged 16-75 years (without Northern Ireland).
- In the US, the results are representative for passport holders in the US aged 18-75 years.
- All interviews were conducted by our partner IPSOS in January/February 2016, based on their online access panels in each of the three markets.

Greenland BE A PIONEER

air greenland

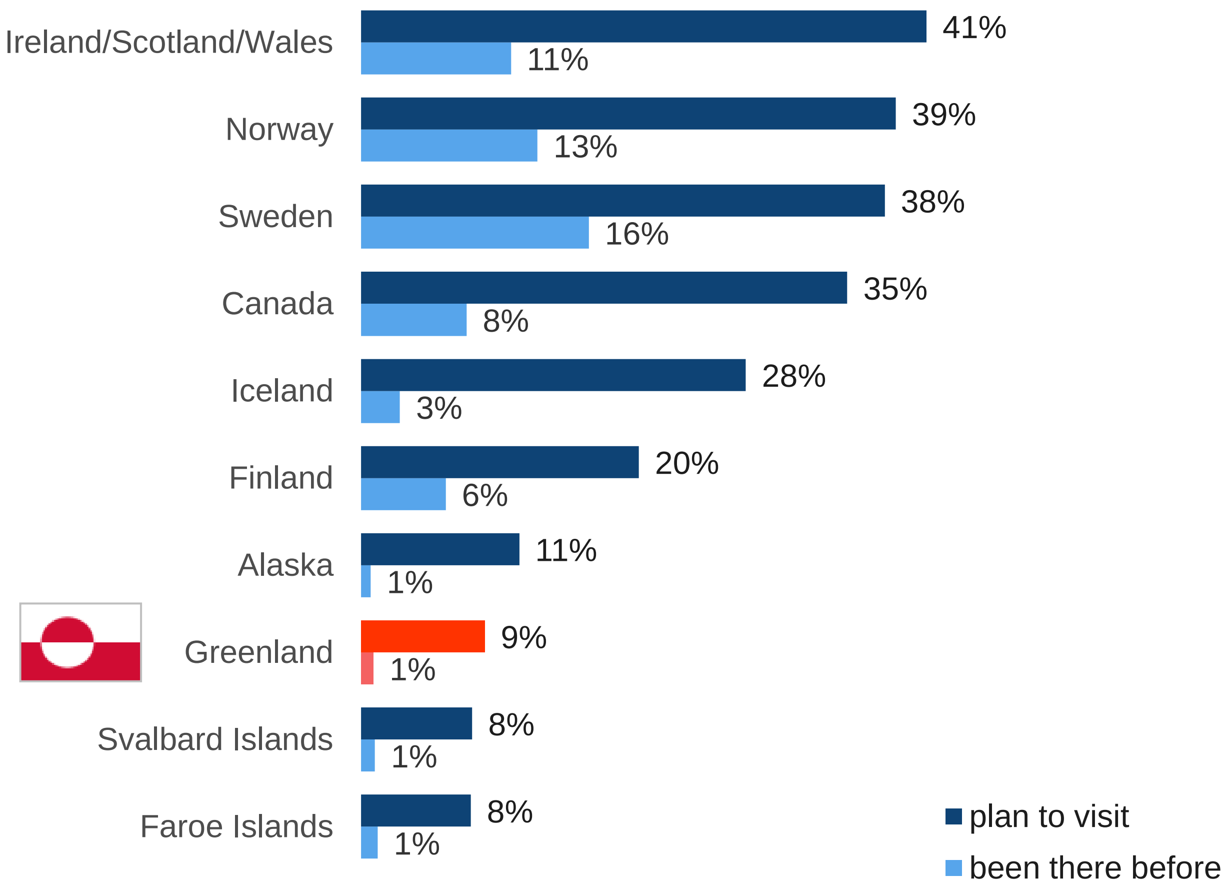
CONTENT

Photo by Rino Rasmussen - Visit Greenland

1. Interest/experience in Germany to travel to Nordic destinations

Photo by Mads Pihl - Visit Greenland

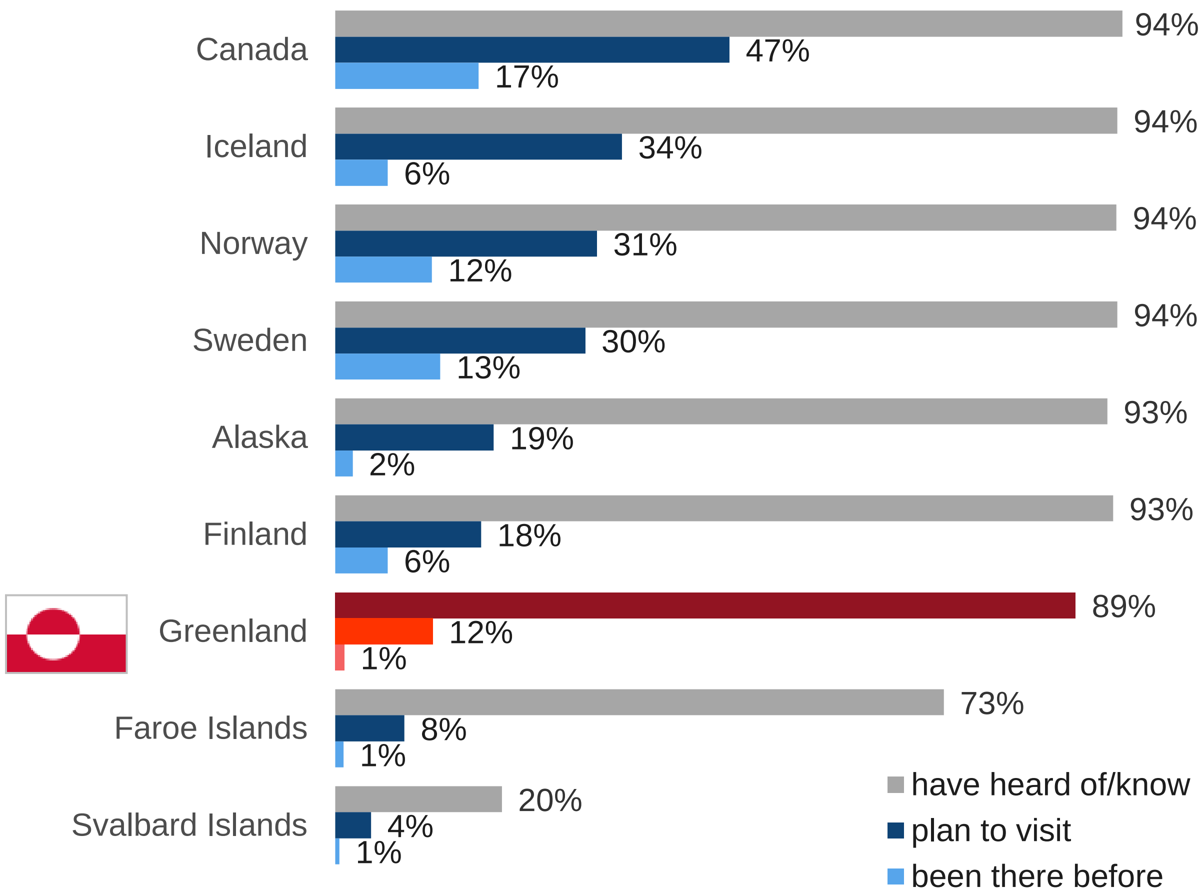
Interest to travel to destinations in the North and actual holiday demand in the past



- 78% of the German population would like to go to at least one of these ten Nordic destinations in the next 5 years. 35% have been to at least one of these destinations at least once in their life.
- Ireland/Scotland/Wales is the most popular destination in terms of interest, Norway, Sweden and Canada follow
- Sweden is by far the most popular destination by demand, followed by Norway, Ireland/ Scotland/Wales, Canada and Finland.
- 9% would like to go to Greenland, 1% have been there in the past.
- The contrast in ranking of the actual and the potential guests is quite striking.

Q2: *Which of these destinations have you already visited for a holiday in the past? Which of these destinations would you like to visit within the next 5 years?*
Basis: All respondents in Germany (n=4,000); Source: NATA online survey 2016 by NIT/Ipsos

Awareness of destinations in the North, interest to travel there and actual holiday demand



- The awareness levels regarding most of the Nordic destinations are high, including the awareness of Greenland (89%)
- 71% of the British population would like to go to at least one of these nine Nordic destinations in the next 5 years. 33% have been to at least one of these destinations at least once in their life.
- Canada is the most popular destination in terms of interest, Iceland, Norway, Sweden follow
- Canada is also the most popular destination by demand, followed by Sweden, Norway, Finland and Iceland.
- 12% would like to go to Greenland, 1% have been there in the past.

Q2: *Now we are talking about holiday destinations in the North. Which of these holiday destinations do you know, if only by name? Which of these destinations would you like to visit within the next 5 years? And which of these destinations have you already visited for a holiday in the past?*
Basis: All respondents in Great Britain (n=4,000); Source: VG online survey 2016 by NIT/Ipsos

Awareness of destinations in the North, interest to travel there and actual holiday demand

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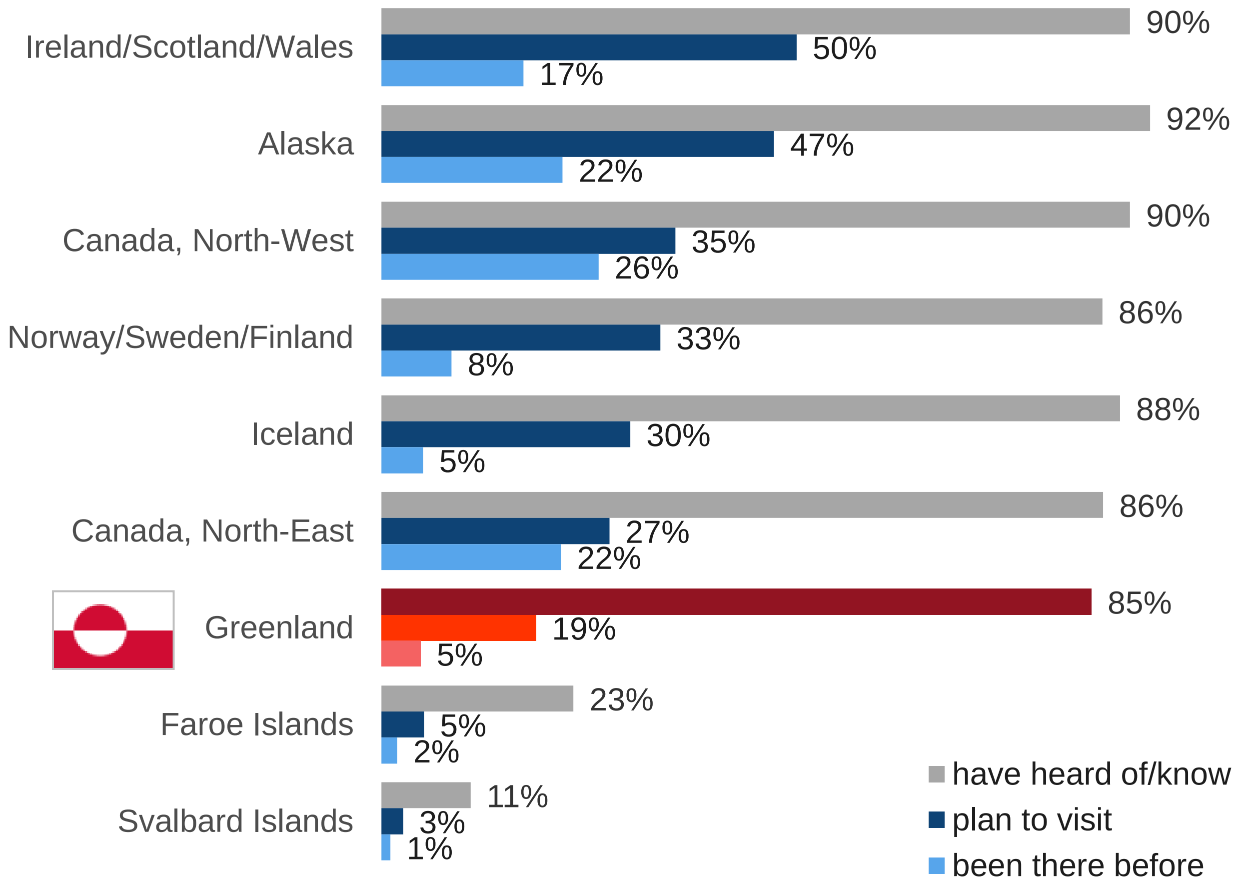
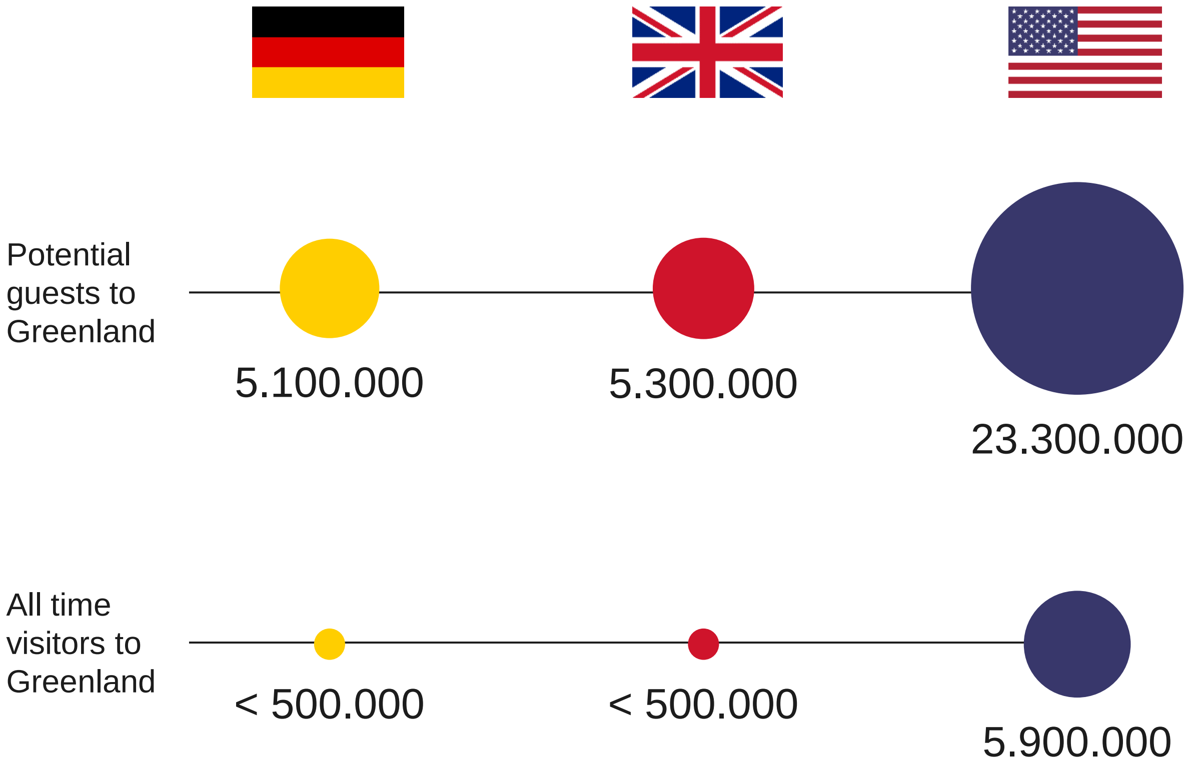


- » The awareness level regarding most of the Nordic destinations are high, including the awareness of Greenland (85%)
- » 83% of the US passport holders would like to go to at least one of these nine Nordic destinations in the next 5 years. 56% have been to at least one of these destinations at least once in their life.
- » Ireland/Scotland/Wales is the most popular destination in terms of interest, Alaska, North-West Canada and Scandinavia follow.
- » North-West Canada is also the most popular destination by demand, followed by North-East Canada and Alaska.
- » 19% would like to go to Greenland, 5% (??) have been there in the past.

Q2: *Now we are talking about holiday destinations in the North. Which of these holiday destinations do you know, if only by name? Which of these destinations would you like to visit within the next 5 years? And which of these destinations have you already visited for a holiday in the past?*
Basis: All respondents in the USA (n=4,000); Source: VG online survey 2016 by NIT/Ipsos

Volume estimates of potential and actual guests to Greenland in the three markets



- These volume figures are estimates, applied to the volume of the universe in the respective countries:
  - Germany: 56.8 million German-speaking population in Germany aged 16-70 years.
  - Great Britain: 45.7 million British population aged 16-75 years (without Northern Ireland)
  - USA: 125.9 million passports in circulation (unfortunately there is no figure for the passport holders 18-75 years).
- As it was the aim of our survey to identify a very wide market potential, the figures for Germany and Great Britain seem plausible.
- The figures for the US seem very high (especially the number of actual Greenland visitors). This might be an indicator that not everybody who claims to have been to Greenland knows exactly what they are talking about.

Q2: *Which of these destinations would you like to visit within the next 5 years? And which of these destinations have you already visited for a holiday in the past?*
Source: NATA/VG online survey 2016 by NIT/Ipsos

To Learn 1: Interest/experience in Germany, Great Britain, USA to travel to Nordic destinations

- The awareness of Greenland as a holiday destination is very high in all three markets. It is highest within the British population with 89%, followed by Germany with 86% (figure from 2012 NATA study) and the USA with 85%.
- The interest to travel to Greenland is highest in the USA with 19% of the passport holders, followed by 12% of the population in Great Britain and 9% in Germany. These figures (especially in the USA) seem quite high, but as it has been the aim of the study to address a wide potential, they seem plausible.
- Regarding the share of all time travellers to Greenland, we find around 1% in the German and the British population, which seems plausible. Within the US passport holders, around 5% state that they have been to Greenland. This figure does not seem plausible and might be an indicator that not everybody who claims to have been to Greenland knows exactly what they are talking about.
- Regarding the general ranking of the Nordic destinations in terms of interest to travel there , we see that Greenland is obviously one of the more exotic destinations, in all three markets in front of Faroe Islands and Svalbard Islands, but behind the large destinations in Scandinavia, the British Islands, North America and Iceland.

- In all three markets the awareness figures for Greenland as a holiday destination are sufficient to provide a solid basis for potential visitors. Campaigns to stimulate the awareness of Greenland as a holiday destination do not seem necessary in any of the markets.
- Compared with the actual demand, there is a huge interest to travel to Greenland in all the three markets. This is the room for destination marketing. The following part of the report should help with strategic marketing decisions.
- The ranking of the Nordic destinations already indicates that each destination is in competition with one another and with other destinations around the globe. Chapter 7 of this report sheds a light on the competitive situation for Greenland in the three markets.

2. Product preferences of potential travellers when travelling to Greenland

Photo by Mads Pihl - Visit Greenland

Potential travellers to Greenland:
Preferred holiday experiences in Greenland

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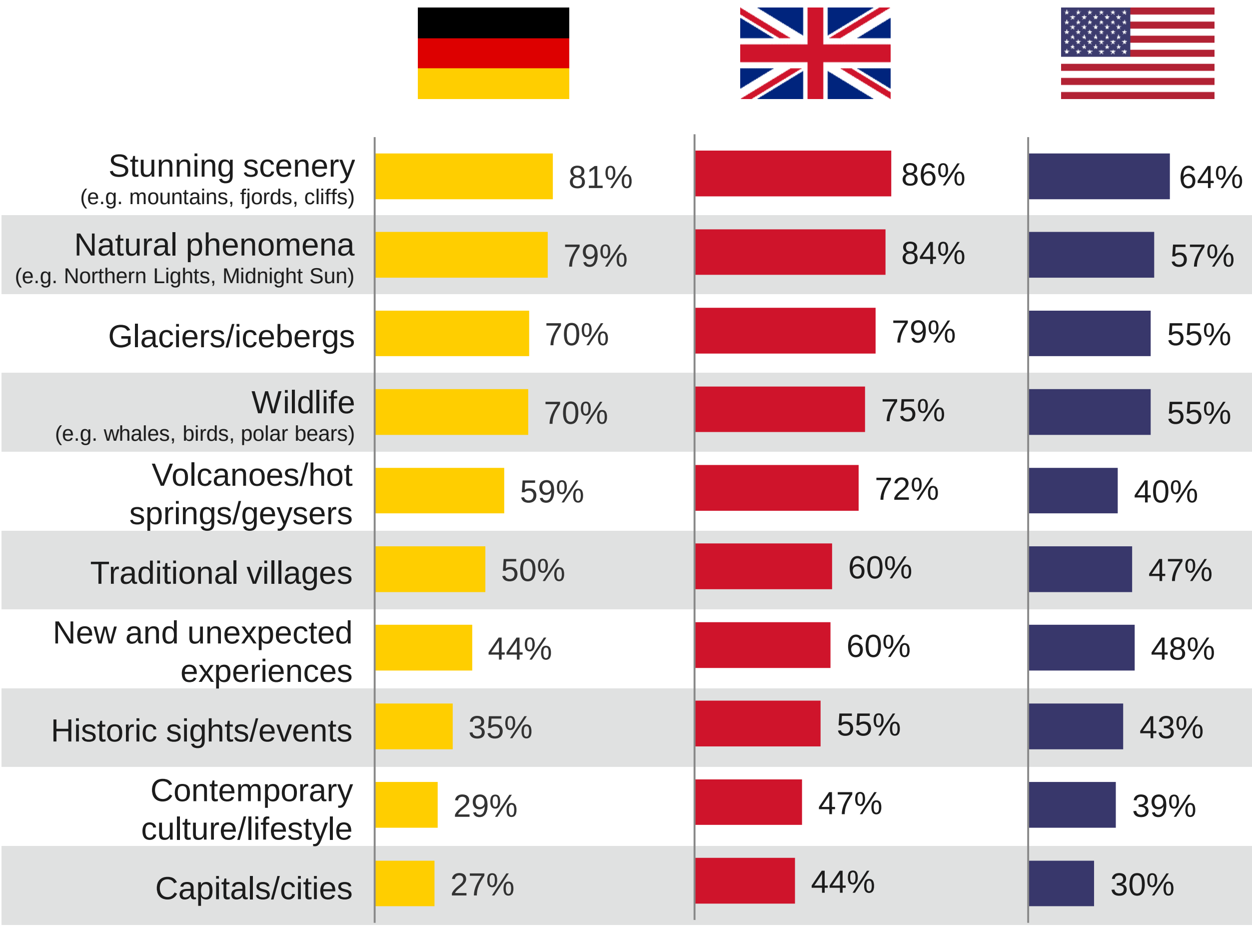

» The ranking of what potential travellers in Germany, Great Britain and USA would like to see/ experience in Greenland is very similar.

» In all three markets, the stunning scenery and the natural phenomena (e.g. northern lights, midnight sun) are most important.

» On average, 6.6 of the 10 aspects are of interest in Great Britain, 5.4 aspects in Germany and 4.8 aspects in USA.

» The distance between the highest and the lowest aspect is biggest in Germany – they seem to differentiate more between the aspects than people in Great Britain or USA.

Q4: *When thinking about travelling to Greenland what would you like to see/experience?*
Basis: Potential travellers to Greenland from Germany (n=357), Great Britain (n=469) and the USA (n=739) ; Source: NATA/VG online survey 2016 by NIT/Ipsos

Potential travellers to Greenland:
Preferred holiday activities in Greenland I

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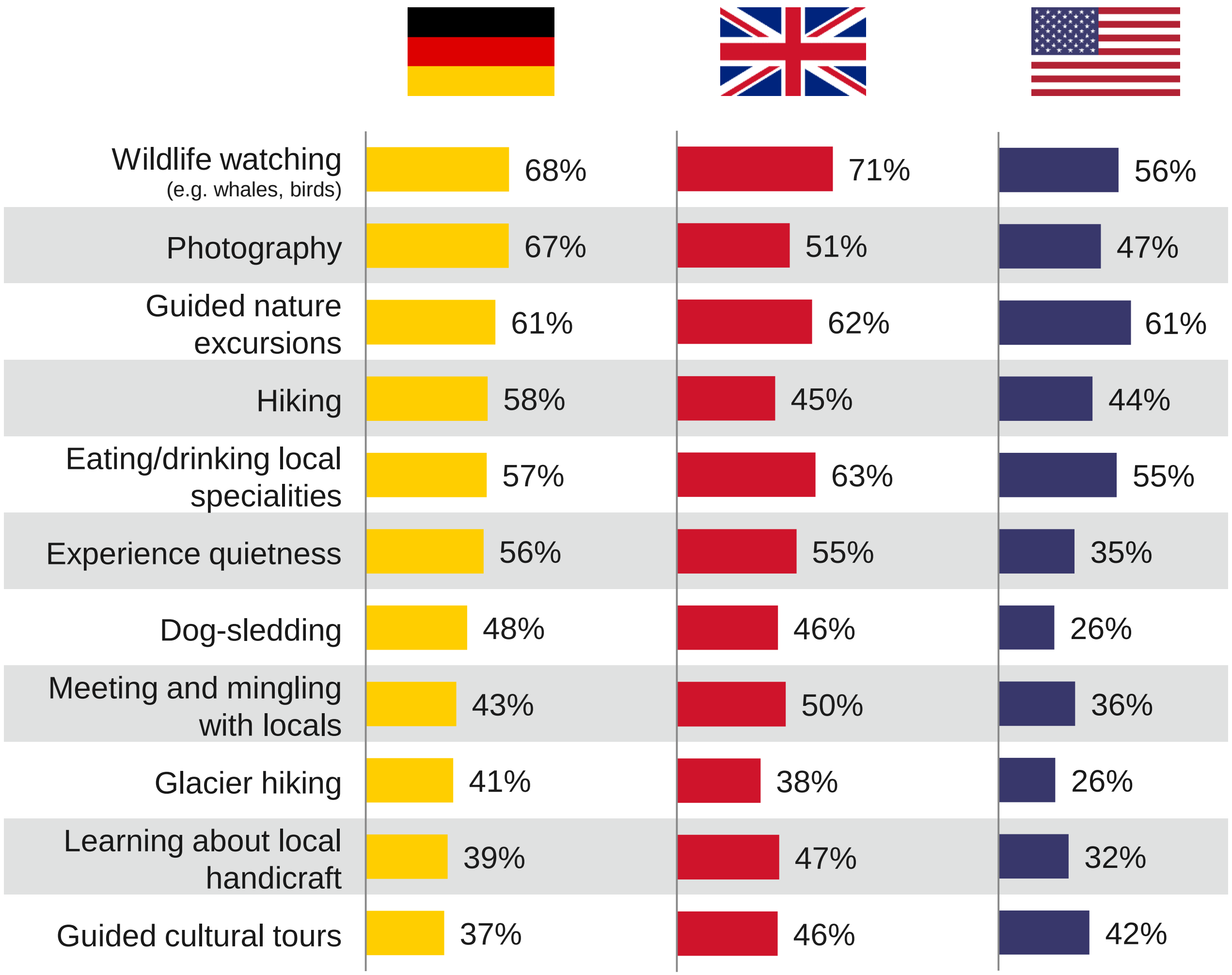
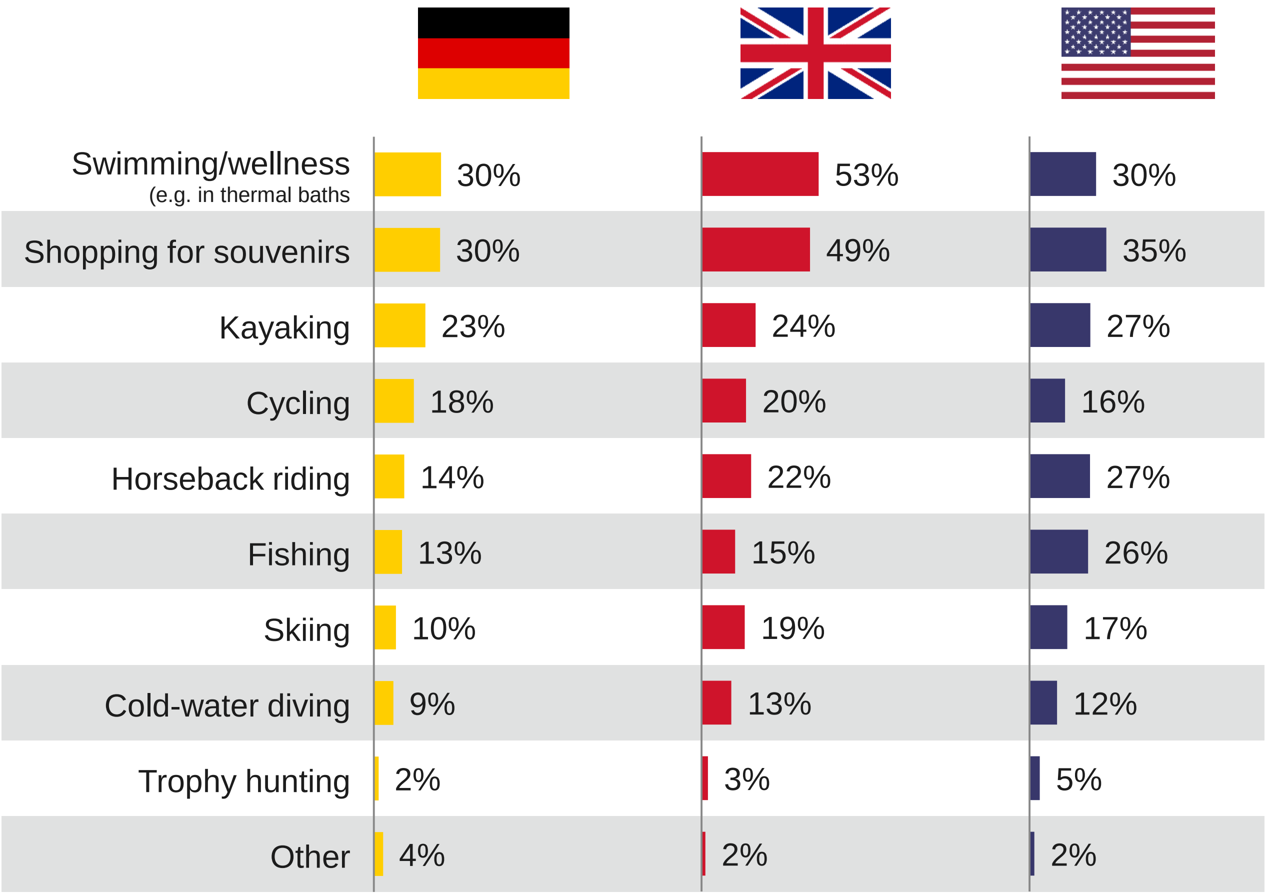


- In the three markets, there are similar activities that potential guests to Greenland would like to do there, but yet the ranking is somewhat different and shows possibilities for differentiation.
- Germany:
  - Wildlife watching
  - Photography
  - Guided nature excursions
  - Hiking
- Great Britain:
  - Wildlife watching
  - Local culinary experiences
  - Guided nature excursion
  - Experience quietness
- USA:
  - Guided nature excursions
  - Wildlife watching
  - Local culinary experiences
  - Photography

Q5: *Which of the following activities would you like to do when travelling to Greenland?*
Basis: Potential travellers to Greenland from Germany (n=357), Great Britain (n=469) and the USA (n=739) ; Source: NATA/VG online survey 2016 by NIT/Ipsos

Potential travellers to Greenland: Preferred activities in Greenland II



- As we wanted to know about the preferred activities in Greenland in great detail we asked a list of 20 different activities.
- On this slide you can see the second half of the list (based on a German market based ranking), which are mostly secondary or niche activities.
- At the same time this part of the question might be used to filter out potential Greenland travellers who are not very familiar with tourism product of Greenland.

Q5: *Which of the following activities would you like to do when travelling to Greenland?*
Basis: Potential travellers to Greenland from Germany (n=357), Great Britain (n=469) and the USA (n=739) ; Source: NATA/VG online survey 2016 by NIT/Ipsos

Potential travellers to Greenland: Getting to Greenland and around

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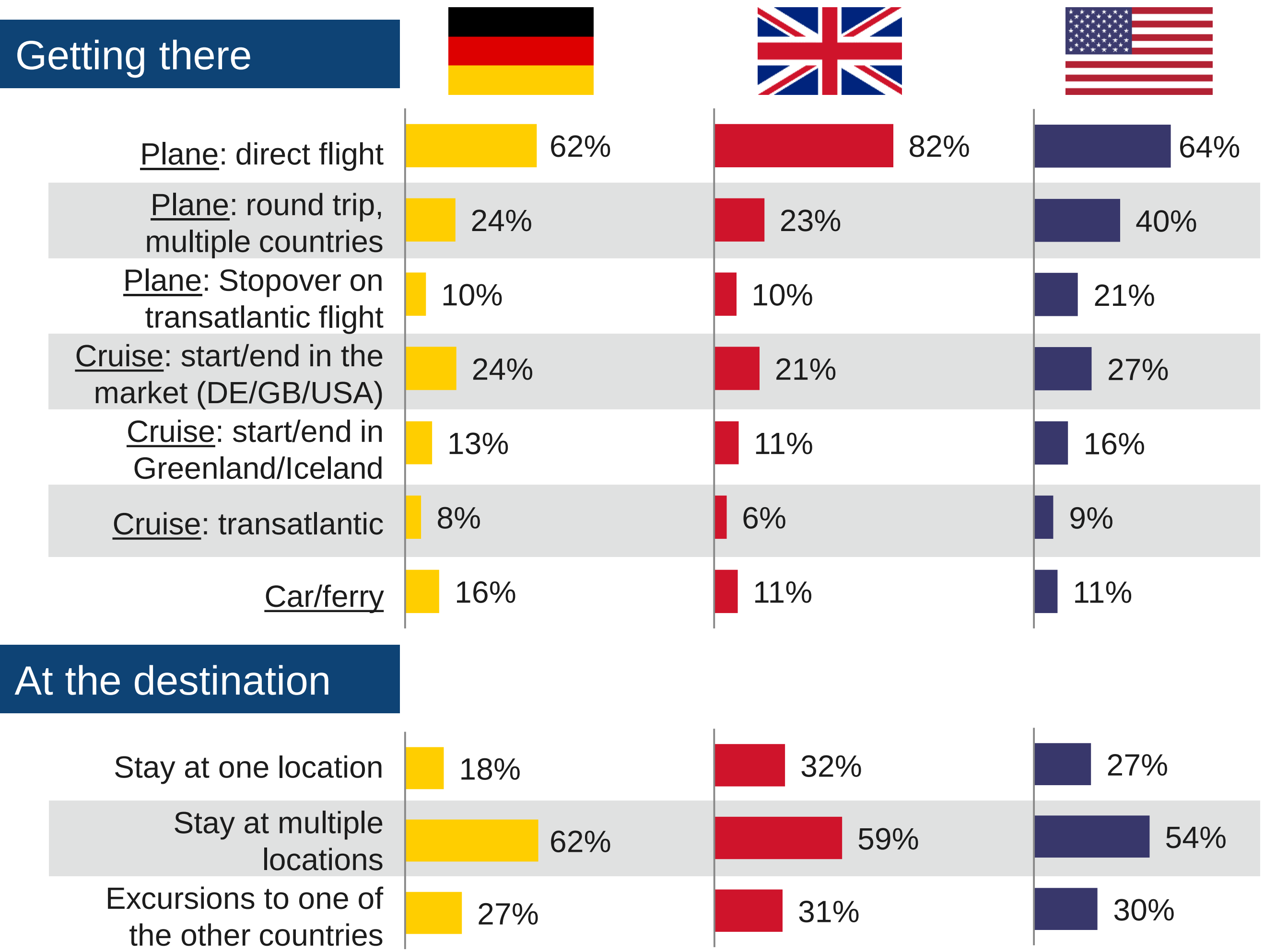
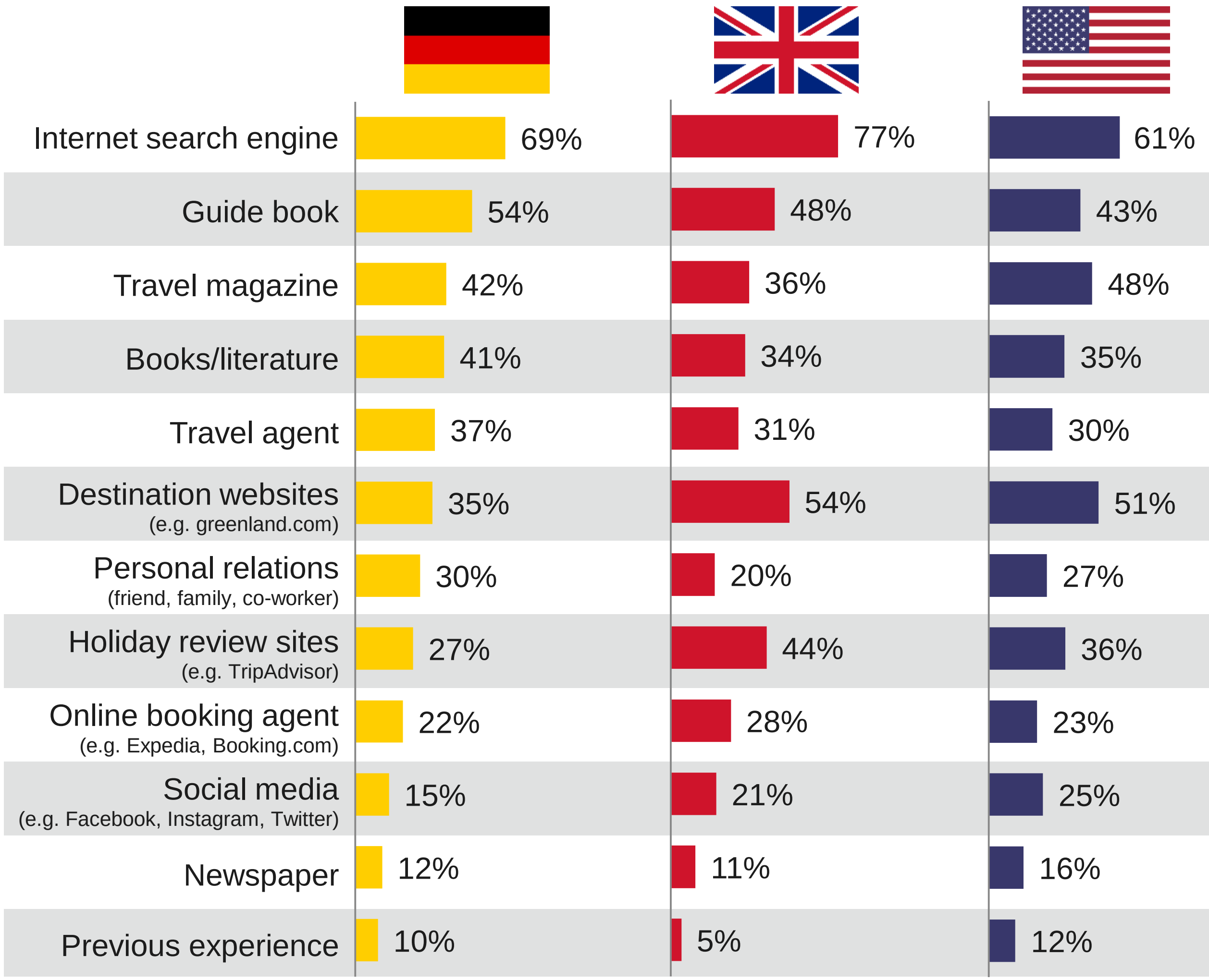


- Even though most potential travellers prefer direct flights into the region, a lot of potential travellers to Greenland can think of other ways to travel there.
- In all three markets, there is a quite large share of potential guests who want to include it in a multi country air trip or as a cruise destination.
- The share of car/ferry enthusiasts shows that apparently not everybody has a clear picture of the destination.
- At the location, the picture is very similar between the three markets, again: Most prefer multiple locations and around 30% can imagine excursions to another country within the region.

Q6: *How would you like to travel to Greenland?*
Basis: Potential travellers to Greenland from Germany (n=357), Great Britain (n=469) and the USA (n=739); Source: NATA/VG online survey 2016 by NIT/Ipsos

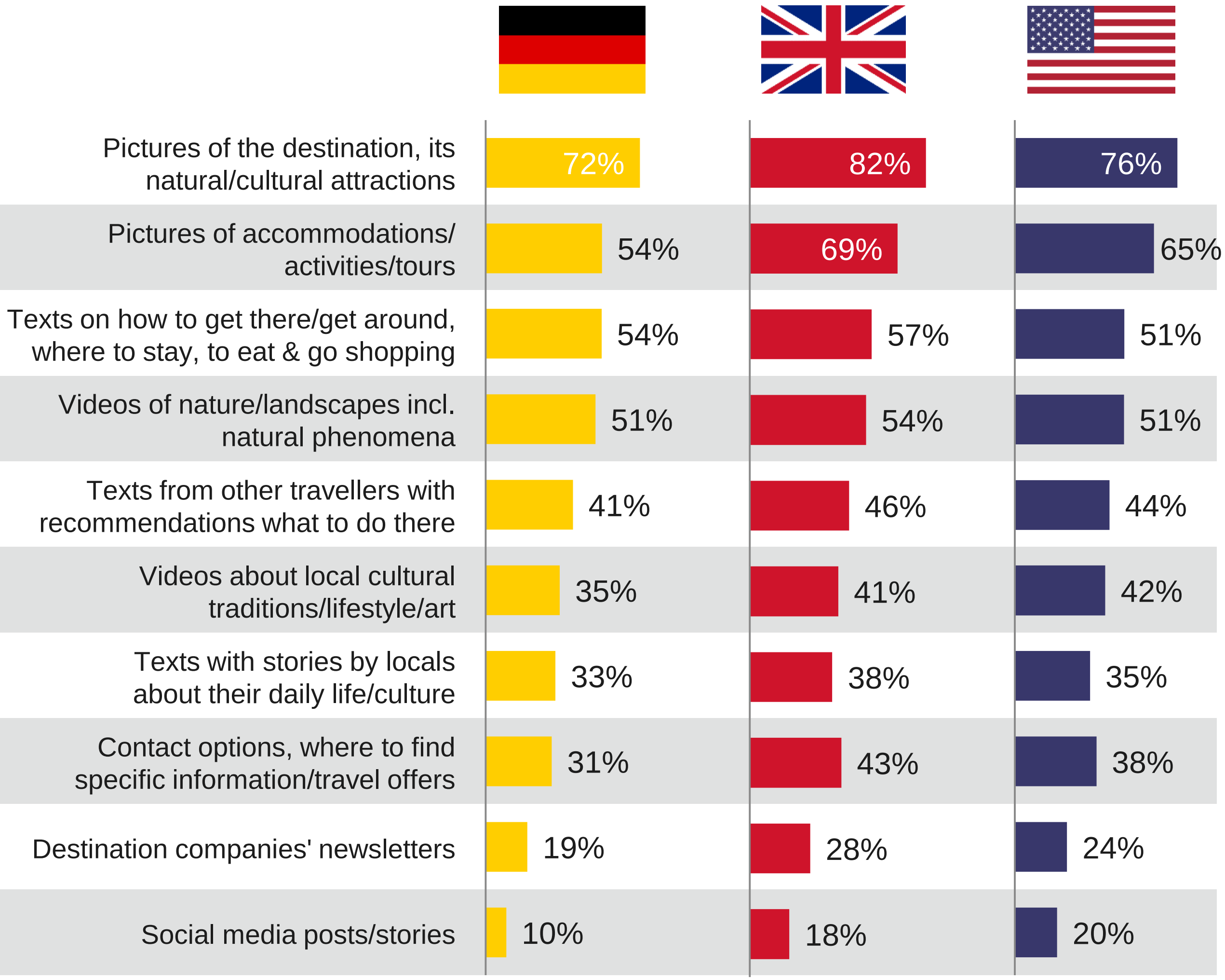
Potential travellers to Greenland: Preferred sources for inspiration & information



- There are a lot of similarities in the information and inspiration preferences in the three markets, but yet the ranking is somewhat different and shows needs for differentiation.
- Germany:
  - Internet search engine
  - Guide book
  - Travel magazine
  - Books/literature
- Great Britain:
  - Internet search engine
  - Destination websites
  - Guide book
  - Holiday review site
- USA:
  - Internet search engine
  - Destination website
  - Travel magazine
  - Guide book

Q7: *When thinking about travelling to Greenland how would you like to look for inspiration/information for this trip?;*
Basis: Potential travellers to Greenland from Germany (n=357), Great Britain (n=469) and the USA (n=739); Source: NATA/VG online survey 2016 by NIT/Ipsos

Potential travellers to Greenland: Preferred kind of online content



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

» These seem to be basic prerequisites that every travel website should offer.

» Then come videos of the destination, texts and videos by other travellers and locals.

» Only a minority is interested in destination newsletters or social media posts.

Q8: *Which kind of content do you like to find when looking for online information about Greenland?;*
Basis: Potential travellers to Greenland from Germany (n=357), Great Britain (n=469) and the USA (n=739); Source: NATA/VG online survey 2016 by NIT/Ipsos

To Learn 2: Product preferences of potential travellers to Greenland

- Experiences: The ranking of what potential travellers in Germany, Great Britain and USA would like to see/ experience in Greenland is very similar.
  - In all three markets, the stunning scenery and the natural phenomena (e.g. northern lights, midnight sun) are most important.
  - On average, 6.6 of the 10 aspects are of interest in Great Britain, 5.4 aspects in Germany and 4.8 aspects in USA. The distance between the highest and the lowest aspect is biggest in Germany – they seem to differentiate more between the aspects than people in Great Britain or USA.
- Activities: In the three markets, there are similar activities that potential guests to Greenland would like to do there, but yet the ranking is somewhat different and shows possibilities for differentiation.
  - Germany: Wildlife watching, Photography, Guided nature excursions, Hiking.
  - Great Britain: Wildlife watching, Local culinary experiences, Guided nature excursions, Experience quietness.
  - USA: Guided nature excursions, Wildlife watching, Local culinary experiences, Photography.
- Getting there/around: Most potential travellers would prefer direct flights into Greenland. Nevertheless, there is a quite large share of potential guests who want to visit Greenland during a multi country air or cruise trip. In Greenland most prefer multiple locations and around 30% can imagine excursions to another country with-in the region.
- Information sources: Internet search is most important in all three markets. In GB and USA, the destination websites come second, in Germany it's the guide books. In all markets a mix of online and offline sources is preferred.
- Online content: When asked for their preferred kind of online content, most potential guests of all three countries favour destination images in front of product images and factual texts on the travel product.

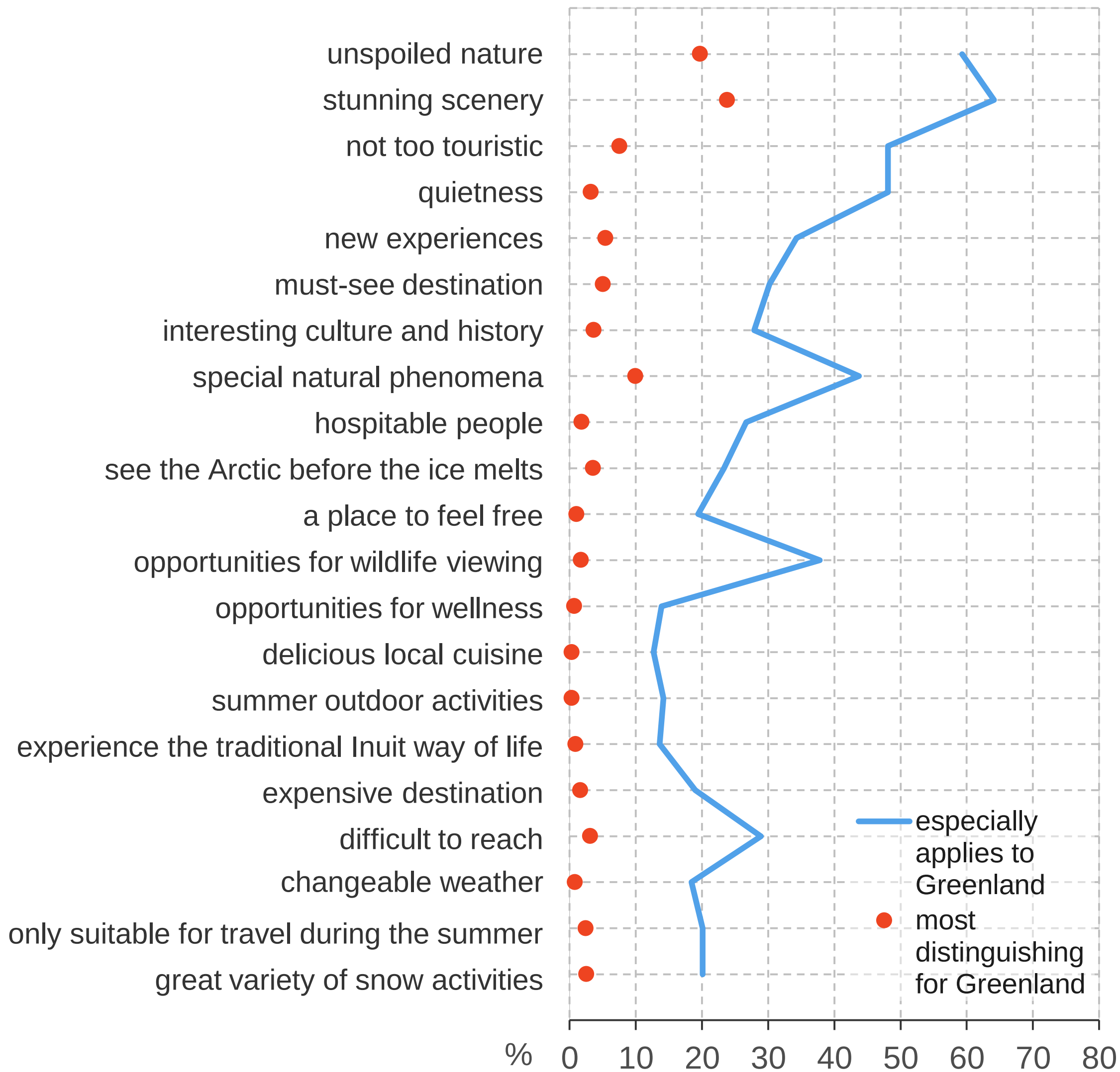
- This chapter is basically the CORE of the study and was the focus of the questionnaire.
- The results help to understand in detail how the potential travellers would like to spend their holidays in Greenland. This knowledge should give you substantial help with regard to product development, marketing strategy and communication.
- The following segmentation of tourists (chapter 5) can help you to draw more specific conclusions for effective targeting approaches.

3. Image of Greenland as a holiday destination on the US and German market

Photo by Mads Pihl - Visit Greenland

Image of Greenland in the US market

[In 2016, image questions were only asked in the US survey]

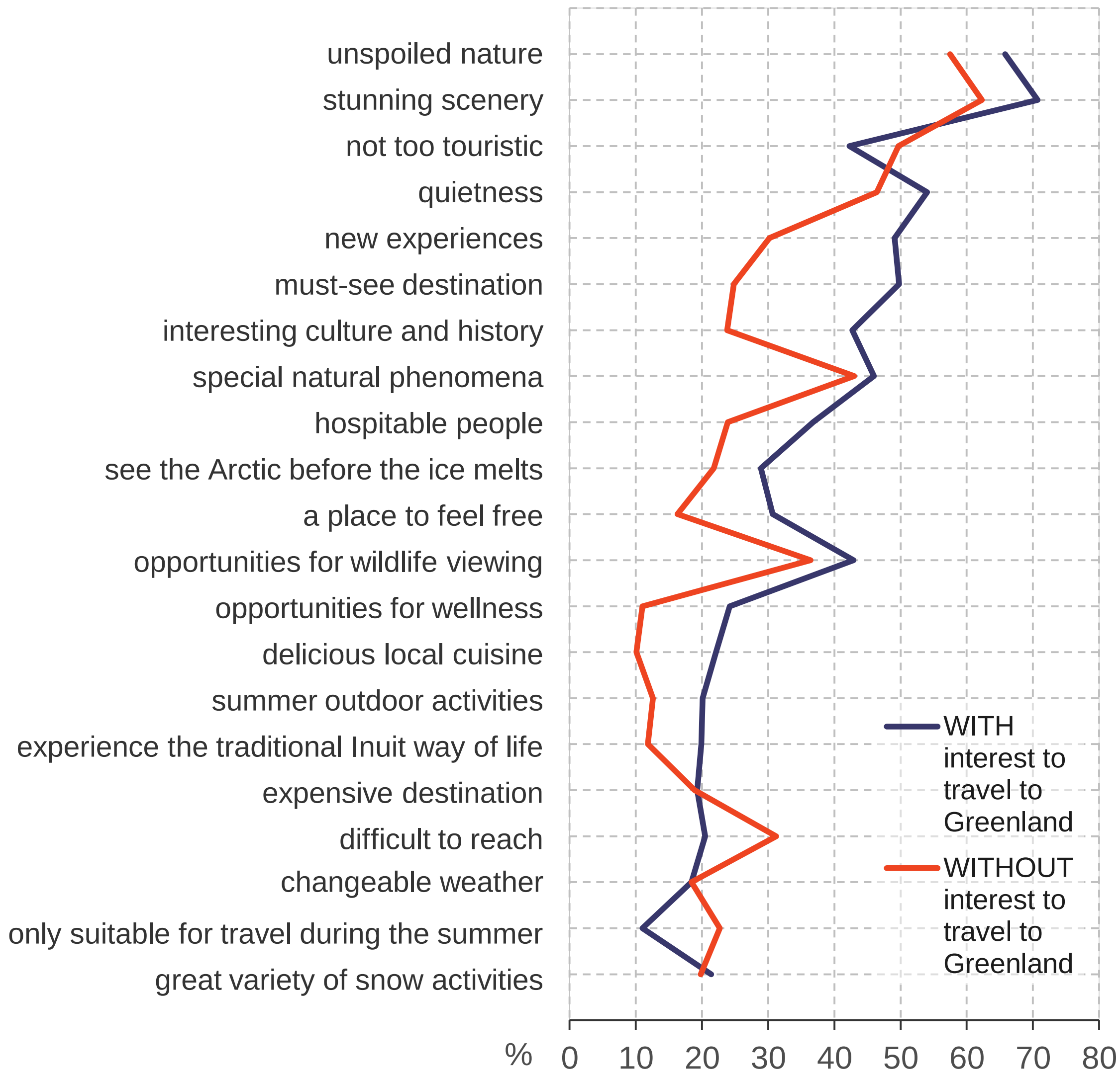


- Persons in the USA who are aware of Greenland as a travel destination name on average 6.2 of the 21 characteristics in the question.
- The key image factors of Greenland are:
  - Stunning scenery (64%)
  - Unspoiled nature (59%)
  - Not too touristic (48%)
  - A place to find quietness (48%)
  - Natural phenomena (44%)
- When asked for THE most distinguishing characteristic, the same factors prevail, yet the ranking differs a little:
  - Stunning scenery (24%)
  - Unspoiled nature (20%)
  - Natural phenomena (10%)
  - Not too touristic (8%)

Q3a: *Please tell me which of these characteristics do you think particularly apply to Greenland?*
Q3b: *And which of these is in your opinion the most distinguishing characteristic of Greenland?*
Basis: All respondents in USA, aware of Greenland as a travel destination (n=3,398)
Source: VG online survey 2016 by NIT/Ipsos

Image of Greenland with the potential travellers

[In 2016, image questions were only asked in the US survey]



- Persons with interest to travel to Greenland name on average 7.4 of the 21 characteristics in the question. Persons with NO interest name 5.9 characteristics.
- The image profiles in both groups run quite parallel, mostly with higher figures for the potential Greenland guests.
- The most striking differences can be found with some of the following characteristics:
  - Must-see destination (+25%-pts.)
  - Culture/History (+19%-pts.)
  - Unexpectedness (+19%-pts.)
- Regarding three characteristics, the persons with NO interest in Greenland show higher figures:
  - Summer-only destination (+12%-pts.)
  - Difficult to reach (+11%-pts.)
  - Not too touristic (+7%-pts.)

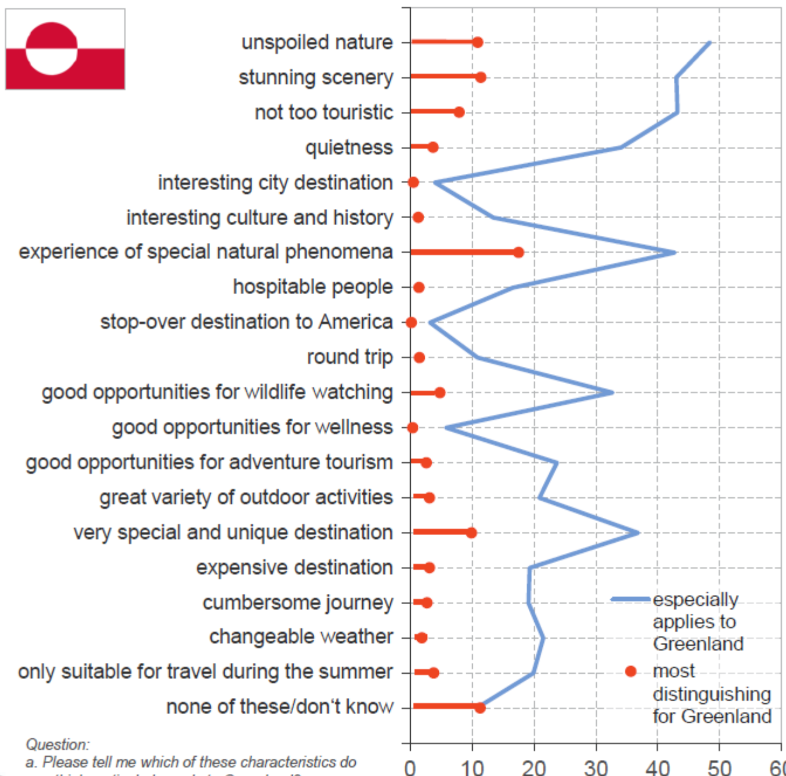
Q3a: *Please tell me which of these characteristics do you think particularly apply to Greenland?*
Basis: All respondents in USA, aware of Greenland as a travel destination WITH interest to travel there (n=739), WITHOUT (n=2,659)
Source: VG online survey 2016 by NIT/Ipsos

Image of Greenland in the German market

[Greenland results of the 2012 NATA study]

4. Image as holiday destinations

Image Greenland: Unique destination for nature, scenery, wildlife



Question:
a. Please tell me which of these characteristics do you think particularly apply to Greenland?
b. And which of these is in your opinion the most distinguishing characteristic of Greenland?

Source: RA *online* 5/2012
Basis: German-speaking population 14-70 years, aware of Greenland as a holiday destination

- Persons aware of Greenland as a holiday destination name on average 4.7 of the 20 characteristics in the question.
- The key image factors of Greenland are:
  - Unspoiled nature (48%)
  - Stunning scenery (43%)
  - Not too touristic (43%)
  - Natural phenomena (43%)
  - Unique (37%)
- When asked for THE most distinguishing characteristic, the same factors prevail, yet the ranking differs a little:
  - Natural phenomena (18%)
  - Stunning scenery (11%)
  - Unspoiled nature (11%)
  - Unique (10%)
- Greenland is not widely known for its culture/history, its hospitable people or for being a round trip destination.

NATA North Atlantic Tourism Association

RA ReiseAnalyse 2012

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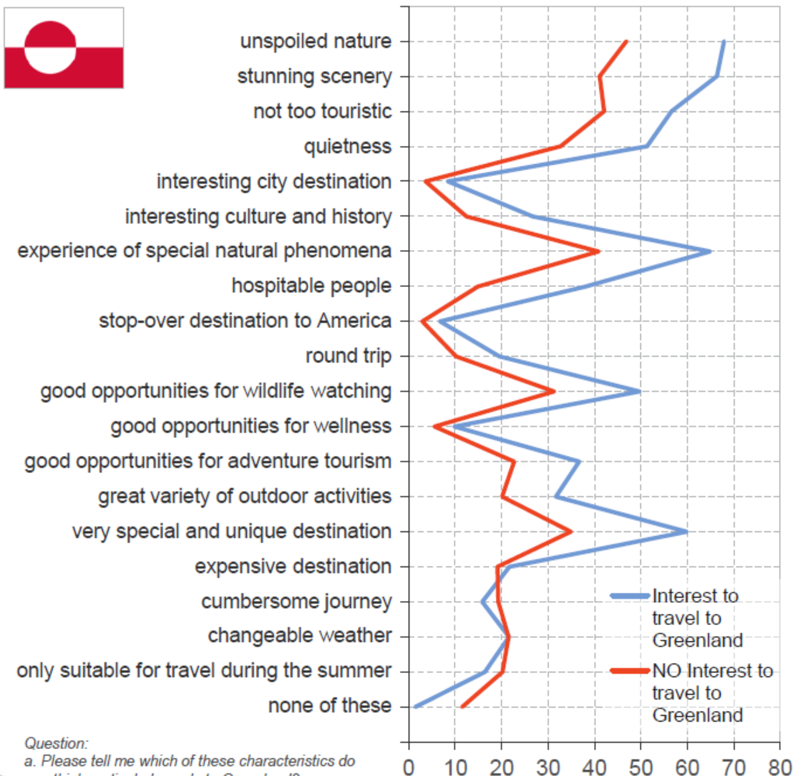
Image of Greenland with the potential travellers

[Greenland results of the 2012 NATA study]

4. Image as holiday destinations

Image Greenland: Potential guests with a much more detailed and positive picture than persons who do not want to visit.



Question:
a. Please tell me which of these characteristics do you think particularly apply to Greenland?
b. And which of these is in your opinion the most distinguishing characteristic of Greenland?

Source: RA *online* 5/2012
Basis: German-speaking population 14-70 years, aware of Greenland as a holiday destination

- Persons with interest to travel to Greenland name on average 6.7 of the 20 characteristics in the question.
- Persons with NO interest name 4.4 characteristics.
- The image profiles in both groups run almost parallel with higher figures for the prospective Greenland guests.
- The most striking differences can be found with some of the most important characteristics:
  - Stunning scenery (+25%-pts.)
  - Unique (+25%-pts.)
  - Natural phenomena (+24%-pts.)
  - Hospitable people (+23%-pts.)
- Concerning the negative characteristics of Greenland (expensive, cumbersome, weather, only summer) the figures of both groups are almost on the same level.

NATA North Atlantic Tourism Association

RA ReiseAnalyse 2012

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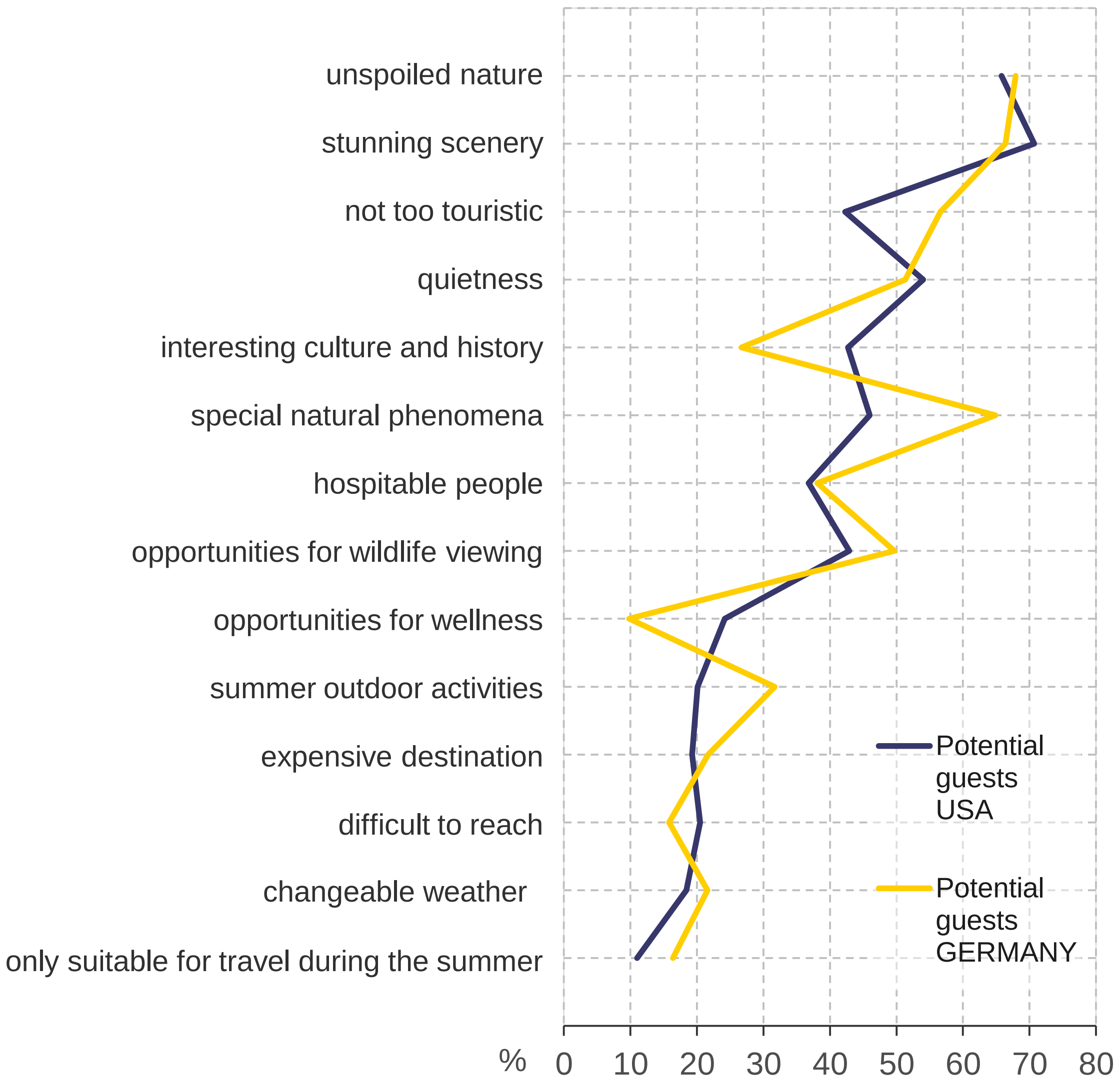
Image comparison: Greenland in USA and GER

[Image of potential travellers in USA/2016 and Germany/2012]



- » Due to budget reasons, the image question was included 2016 only in the US survey. This slide shows a comparison of the USA results of 2016 with the results in Germany 2012, where possible.
- » Generally, the Greenland image in the two markets is similar, the top characteristics are even the same: “Stunning scenery” and “Unspoiled nature”.
- » More characteristic for the Americans than for the Germans :
  - » Culture/History (+16%-pts.)
  - » Wellness (+12%-pts.)
  - » Difficult to reach (+5%-pts.)
- » More characteristic for the Germans than for the Americans:
  - » Natural phenomena (+19%-pts.)
  - » Not too touristic (+14%-pts.)
  - » Outdoor activities (+12%-pts.)
- » The German image profile is a bit more distinct than the American.

Q3a: *Please tell me which of these characteristics do you think particularly apply to Greenland?*
Basis: Potential travellers to Greenland from USA 2016 (n=739) and Germany 2012 (n=159)
Source: NATA/VG online survey 2016 by NIT/Ipsos

To Learn 3: Image of Greenland as a holiday destination on the US and German market

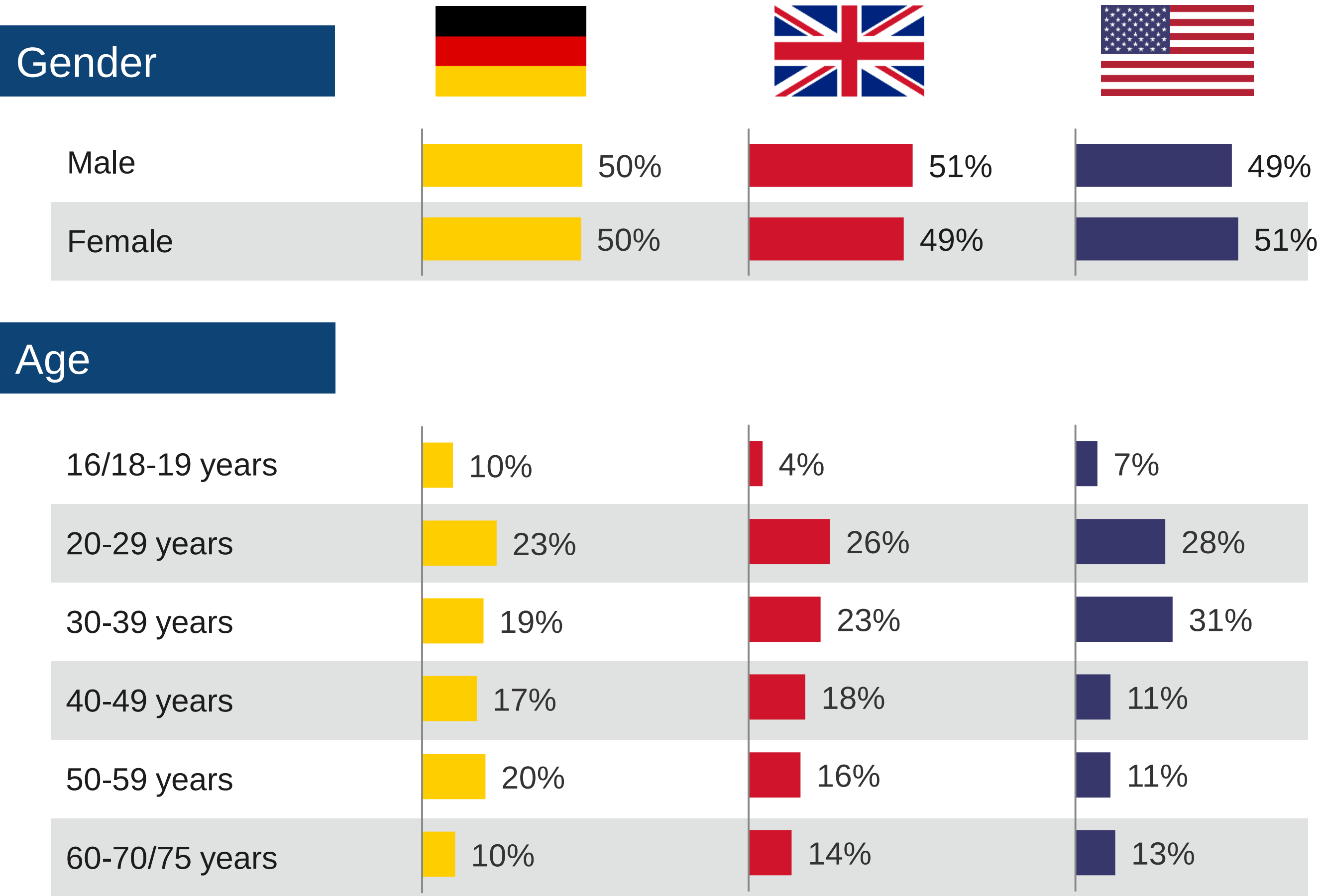
- Image Greenland in the USA:
  - In the mind of the people who are aware of Greenland as a holiday destination, it is known for its stunning scenery, unspoiled nature, for being not too touristic, as a place to find quietness, for its natural phenomena.
  - It is not widely known for its cuisine, outdoor activities, wellness and to experience the Inuit way of life .
  - Persons with interest to travel there much more often see Greenland as a "must-see" and associate it with interesting culture/history and an unexpectedness of experiences than persons with NO interest to travel there
- Image Greenland in Germany (2012 NATA study):
  - In the mind of the people who are aware of Greenland as a holiday destination, it is known for its uniqueness, its unspoiled nature, natural phenomena, the stunning scenery and wildlife.
  - It is not widely known for its culture/history, its hospitable people or for being a round trip destination.
  - Persons with interest to travel there much more often associate Greenland with stunning scenery, uniqueness, natural phenomena and hospitable people than persons with NO interest to travel there
- Image comparison USA and Germany
  - Generally, the Greenland image in the two markets is similar, the top characteristics are even the same: "Stunning scenery" and "Unspoiled nature".
  - The German image profile is a bit more distinct than the American, meaning the Germans seem to differentiate more between the characteristics and thus might have a slightly clearer picture of Greenland as a holiday destinations
  - More characteristic for the Americans than for the Germans are culture/history, wellness opportunities and the impression that it's difficult to reach
  - More characteristic for the Germans than for the Americans are natural phenomena, the perception that it's not too touristic and outdoor activities.

- The results about the image perception of Greenland in USA and Germany helps you to refine your knowledge about the markets and the potential Greenland visitors in these markets.
- They clearly show what potential travellers expect and what not.
- The differences between the markets can help you in planning a market specific marketing and communication

4. Socio-demographic profiles of potential travellers to Greenland

Photo by Mads Pihl - Visit Greenland

Potential travellers to Greenland: Demographics I

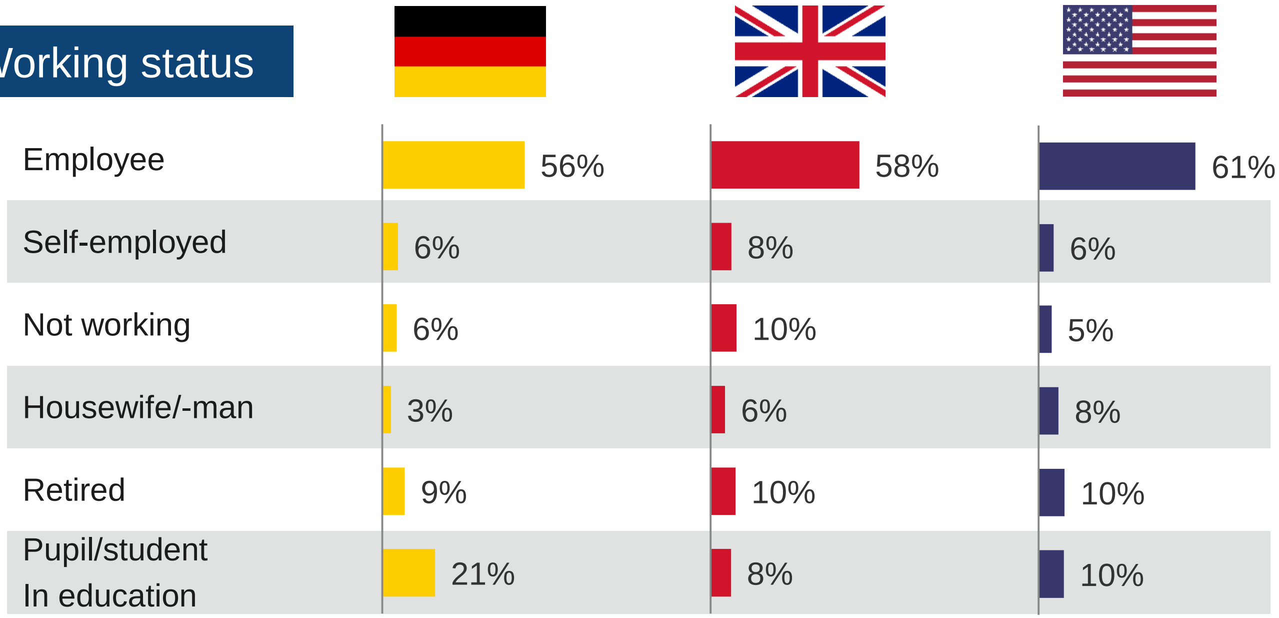


- The potential Greenland travellers in the three markets are quite evenly distributed on both sexes.
- The age structure of potential Greenland travellers is youngest in the USA and oldest in Germany.
- In Germany their age structure is similar to the population, in Great Britain it's somewhat, in USA significantly younger.
- In Germany the 10 year cohorts between 20 and 59 are almost evenly represented. In the USA there is a clear dominance of the 20-39. Great Britain is in-between.
- In the USA the 20-39 year olds account for more than half of the potential guests:
  - USA (59%)
  - Great Britain (49%)
  - Germany (42%)

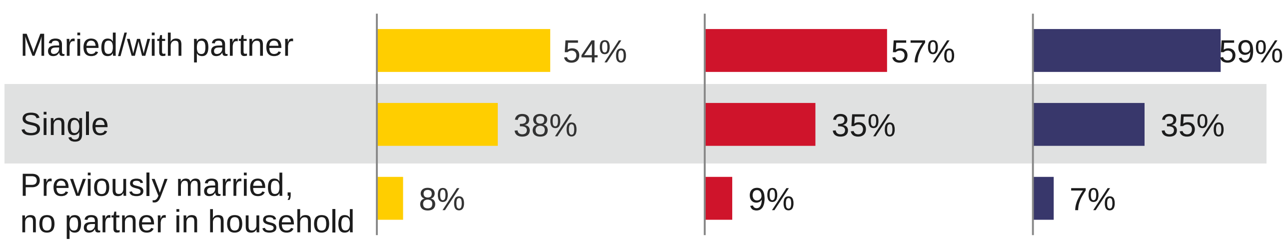
Basis: Potential travellers to Greenland from Germany (n=357), Great Britain (n=469) and the USA (n=739);
Source: NATA/VG online survey 2016 by NIT/Ipsos

Potential travellers to Greenland: Demographics II

Working status



Marital status



- Concerning their working status, the biggest group of potential Greenland travellers in all three markets is made up of employees (56%-61%). This is similar to the share of employees in the population of the three markets (around 56% in each market).
- In Germany, the students stick out. The share of 21% being double their share in the population.
- Concerning their marital status, there are again high similarities between the markets. Dominant but underrepresented are persons living with a partner. Second come (overrepresented) the singles.

Basis: Potential travellers to Greenland from Germany (n=357), Great Britain (n=469) and the USA (n=739);
Source: NATA/VG online survey 2016 by NIT/Ipsos

Potential travellers to Greenland: Demographics III

Size of household

			
1 person	21%	16%	20%
2 persons	33%	35%	27%
3 persons	21%	20%	19%
4 persons or more	26%	29%	35%

Children ≤18y.

Yes	31%	28%	42%
No	69%	72%	58%

- Also in terms of household size and children in household, the potential Greenland travellers in the three markets do not differ much from each other.
- Around half live in households of one or two persons, and half in households with three and more persons.
- The two person households are underrepresented, the 4+ person households overrepresented.
- Most potential Greenland travellers live in households without kids.
- In the USA the share of persons living with kids is significantly overrepresented.

Basis: Potential travellers to Greenland from Germany (n=357), Great Britain (n=469) and the USA (n=739);
Source: NATA/VG online survey 2016 by NIT/Ipsos

Potential travellers to Greenland in GERMANY: Demographics IV

NIT
NEW INSIGHTS FOR TOURISM

Education

low	*6%*	5%
middle	*47%*	35%
high without university	*28%*	35%
university	*20%*	24%

Income

Up to 1,000 €	*9%*	12%
1,001-2,000 €	*27%*	24%
2,001-3,000 €	*30%*	30%
3,001-4,000 €	*19%*	17%
4,001-5,000 €	*9%*	10%
5,000+ €	*6%*	7%

» Regarding their formal education, we find that potential Greenland travellers have a higher education than the average German.

» The income structure of potential Greenland travellers is very similar to that of the German population.

» The majority of potential Greenland travellers (71%) have a monthly household net income between 1,000 and 4,000 €

» The income group of 4.000+ EUR is slightly overrepresented.

Basis: Potential travellers to Greenland from Germany (n=357), income: only with response regarding income (n=311)
Source: NATA online survey 2016 by NIT/Ipsos

Potential travellers to Greenland in GREAT BRITAIN: Demographics IV

NIT NEW INSIGHTS FOR TOURISM

Education

primary/ secondary school	*8%*	7%
GNVQ/GSVQ/GCSE/SCE standard	*20%*	18%
NVQ1/NVQ2	*9%*	5%
NVQ3/SCE h.g./ adv. GNVQ/GCE A/AS	*24%*	23%
NVQ4/HNC/HND/Bachelor's degree ect.	*29%*	33%
NVQ5 or post-graduate diploma	*11%*	15%

Income

up tp - 9,999 £	*8%*	10%
10,000 - 19,999 £	*20%*	16%
20,000 - 24,999 £	*12%*	12%
25,000 - 34,999 £	*19%*	21%
35,000 - 44,999 £	*14%*	14%
45,000 - 54,999 £	*11%*	10%
55,000 £ or more	*15%*	18%

- Regarding their formal education, we find that potential Greenland travellers have a higher education than the average Brit.
- The income structure of potential Greenland travellers is quite similar to that of the British population.
- The majority of potential Greenland travellers (63%) have an annual household net income of above 25,000 £.
- This income group is slightly overrepresented.

Basis: Potential travellers to Greenland from Great Britain (n=469), income: only with response regarding income (n=419)
Source: VG online survey 2016 by NIT/Ipsos

Potential travellers to Greenland in the USA: Demographics IV

NEW INSIGHTS FOR TOURISM

Education

up to grade 12 (no diploma)	*1%*	2%
regular high school diploma/ GED etc.	*10%*	9%
some collage credit, no degree	*20%*	18%
associate's degree (AA, AS etc.)	*11%*	9%
bachelor's degree (MA, MS, MBA etc.)	*37%*	40%
master's/professional/doctorate degree	*22%*	22%

Income

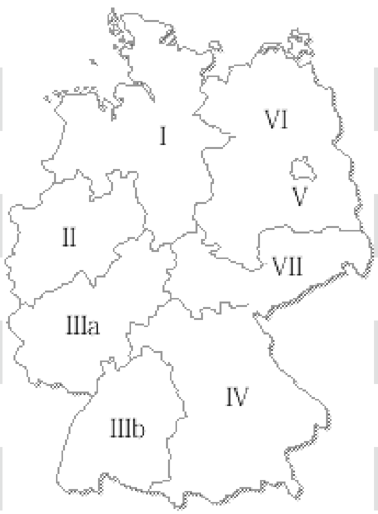
under 25,000 $	*12%*	13%
25,000 - 49,999 $	*19%*	19%
50,000 - 59,999 $	*10%*	9%
60,000 - 69,999 $	*9%*	8%
70,000 - 79,999 $	*11%*	12%
80,000 - 99,999 $	*12%*	13%
100,000 - 149,999 $	*18%*	17%
150,000 $or more	*9%*	10%

- » Regarding their formal education, we find that potential Greenland travellers have a similar structure as all US passport holders.
- » The income structure of potential Greenland travellers is very similar to that of all US passport holders.
- » The majority of potential Greenland travellers (52%) have an annual household net income of above 75,000 $.
- » This income group is slightly overrepresented.

Basis: Potential travellers to Greenland from USA (n=739), income: only with response regarding income (n=695)
Source: VG online survey 2016 by NIT/Ipsos

Potential travellers to Greenland in GERMANY: Demographics V

Regions



I	*16%*	14%
II	*22%*	25%
IIIa	*14%*	11%
IIIb	*13%*	14%
IV	*16%*	18%
V	*4%*	5%
VI	*8%*	9%
VII	*8%*	6%

Size of community

up to 19,999 Inhabitants	*12%*	11%
20,000-99,999 Inhabitants	*21%*	21%
100,000-499,999 Inhabitants	*30%*	30%
500,000+ Inhabitants	*37%*	38%

- The regional structure of potential Greenland travellers is quite similar to that of the German population.
- Most of the potential travellers (71%) live in Nielsen II, IV, I and IIIb.
- Nielsen II (North Rhine-Westphalia) and IV (Bavaria) are slightly overrepresented.
- Most potential Greenland guests live in larger cities of 100,000 inhabitants or more (68%).
- Generally, the structure of potential Greenland guests regarding the size of their home community is the same as within the population.

Basis: Potential travellers to Greenland from Germany (n=357)
Source: NATA online survey 2016 by NIT/Ipsos

Potential travellers to Greenland in GREAT BRITAIN: Demographics V

Regions

North East	4%	3%
North West	12%	10%
Yorkshire and The Humber	9%	9%
West Midlands	9%	8%
East Midlands	7%	6%
Eastern	9%	8%
South West	9%	11%
South East	14%	15%
Greater London	14%	17%
Wales	5%	6%
Scotland	9%	8%

- The regional structure of potential Greenland travellers is quite similar to that of the British population.
- The biggest cluster of potential guests can be found in the Southern parts (London, South East, South West), together 43%. This means these regions are slightly overrepresented.
- Most potential Greenland guests live in densely populated areas of 1,000+ inhabitants/sqkm (53%), slightly more than in the population.

Size of community

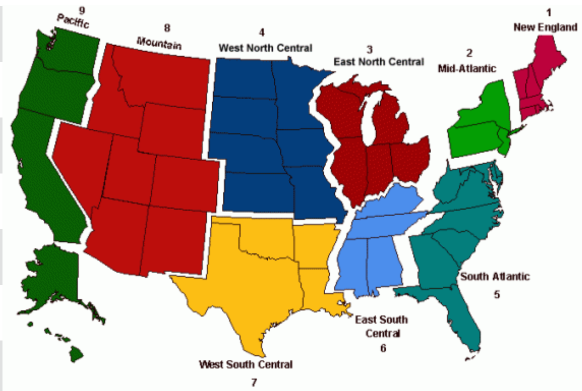
up to 199 inhabitants/sqkm	20%	19%
200-999 inhabitants/sqkm	29%	28%
1,000+ inhabitants/sqkm	50%	53%

Basis: Potential travellers to Greenland from Great Britain (n=469)
Source: VG online survey 2016 by NIT/Ipsos

Potential travellers to Greenland: Demographics II

Regions

New England	*5%*	4%
Middle Atlantic	*13%*	15%
East North Central	*15%*	12%
West North Central	*7%*	7%
South Atlantic	*20%*	20%
East South Central	*6%*	5%
West South Central	*12%*	13%
Mountain	*7%*	7%
Pacific	*16%*	17%



Size of community

up to 499,999 inhabitans	*26%*	23%
500,000-999.999 inhabitants	*11%*	11%
1,000,000-2,499,999 inhabitants	*18%*	17%
2,500,000-4,999,999 inhabitants	*16%*	15%
5,000,000+ inhabitants	*30%*	35%

Basis: Potential travellers to Greenland from the USA (n=739);
Source: VG online survey 2016 by NIT/Ipsos

» The regional structure of potential Greenland travellers is quite similar to that of all US passport holders.

» Most of the potential travellers (65%) live in South Atlantic, Pacific, Middle Atlantic (inkl. NYC), West South Central.

» Middle Atlantic, Pacific and West South Central are slightly overrepresented.

» Most potential Greenland guests live in big cities of 1 million inhabitants and more (67%).

» The big metropolises of 5 million and more inhabitants are slightly overrepresented.

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

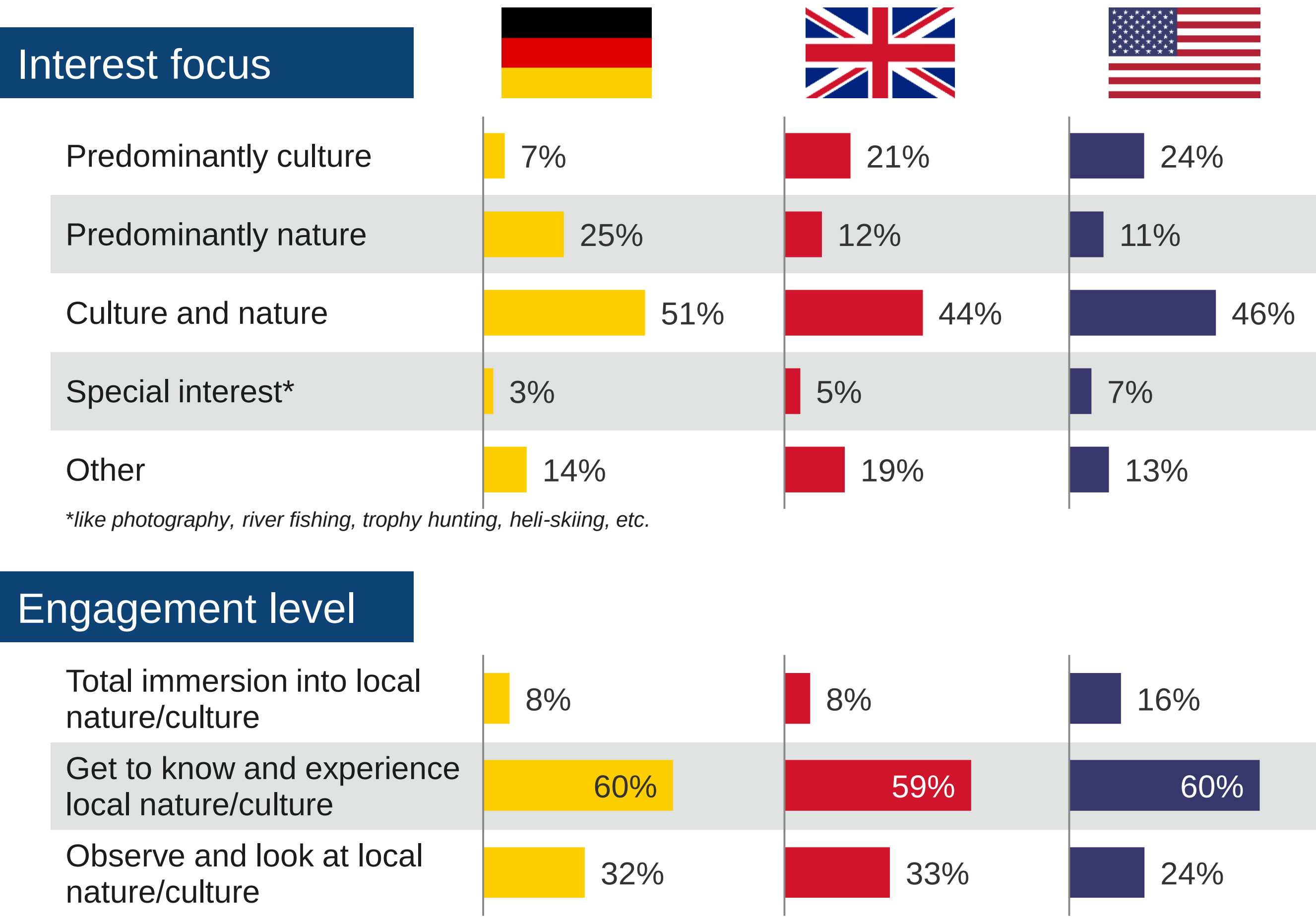
- Gender: The potential Greenland travellers in the three markets are quite evenly distributed on both sexes.
- Age: The majority of potential Greenland travellers in Germany is quite evenly distributed between the 20-59 years old. In Great Britain and USA the focus is on the 20-39 years old.
- Education: Regarding their formal education, we find that potential travellers in Germany and Great Britain have a higher education than the population average. In the USA the structure is similar to all US passport holders.
- Marital status: Concerning their marital status, we find a higher share of singles within the potential travellers in all three markets than in the population. Nevertheless, the majority is living together with a partner.
- Monthly household net income: In all three markets the income structure does not differ much from the population resp. all passport holders (USA). The higher income groups are slightly overrepresented.
- Regional structure: Again the regional distribution of the potential Greenland guests in all three markets does not differ much from the population resp. all passport holders (USA). The main focus in all countries is in the population centers of the countries, in the big cities and metropolises.

- In most regards, the demographic profiles of potential Greenland travellers in the three markets do not differ much from the population resp. all US passport holders. 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. high education level, lots of singles, families in the USA)
- As explained before, we are identifying a very wide potential for Greenland. For marketing activities in the markets it can be sensible to add to the regional structure of potential guests the accessibility of Greenland (e.g. Icelandair airports) for a geographical focus.

5. Segmentation of potential travellers to Nordic destinations

Photo by Mads Pihl - Visit Greenland

Interest focus & engagement level: Basis for the VG segmentation approach



- These two questions on the interest focus regarding nature and culture and the preferred engagement level are the basis for the following segmentation approach by Visit Greenland.
- In all three markets, the mix of culture and nature is dominating, as is the "experience" dimension in terms of engagement.
- In Germany, there are much more people with a "nature" motivation than "culture"; in Great Britain and USA the situation is vice versa.
- Germany and Great Britain are very similar in their "engagement" structure. In the USA the share of "total immersion" is double as high as in GER and Great Britain.

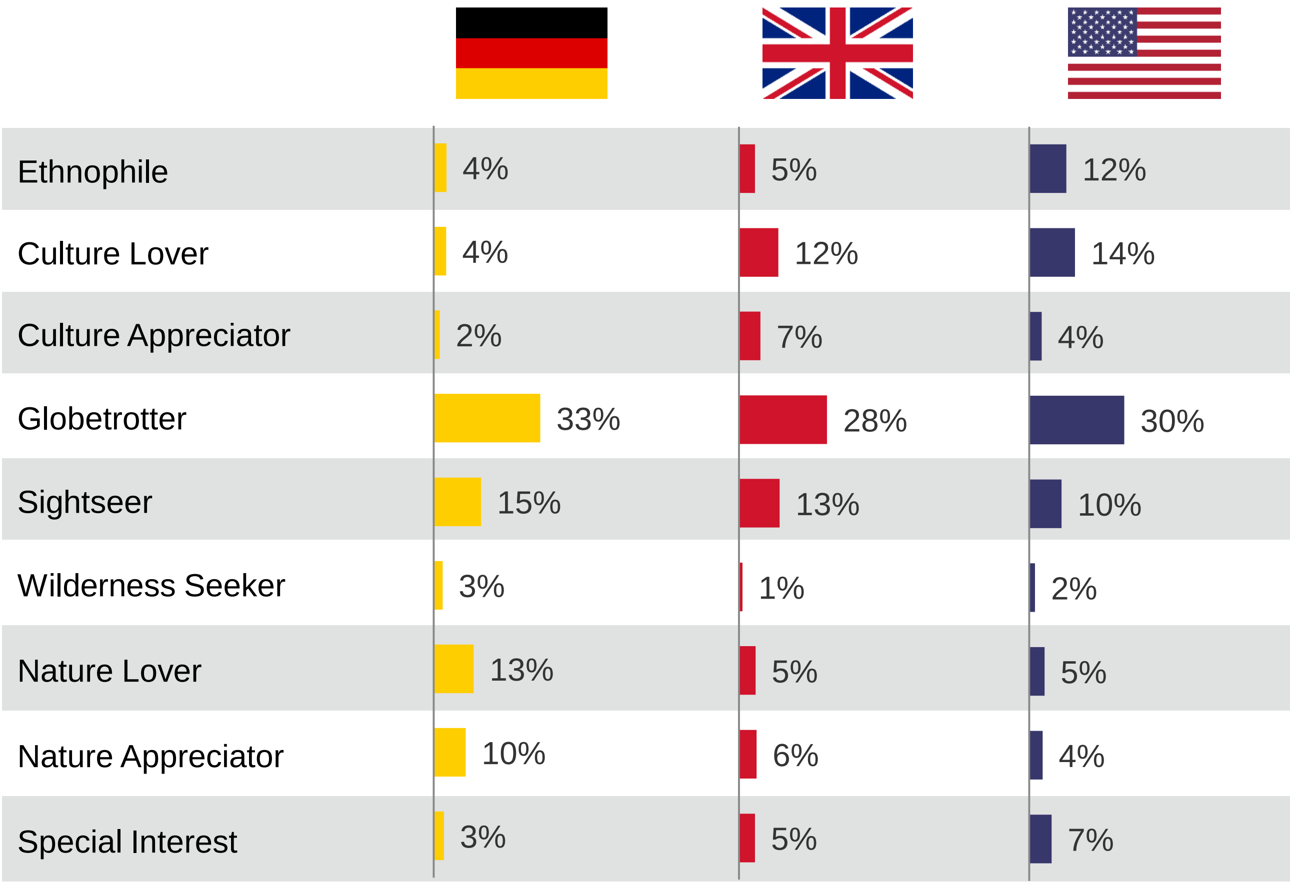
Q1a: *When you travel in general, is it the destination's nature or culture that you want to experience? Or is it something else that motivates you to travel?*
Q1b: *When you travel in general, how close do you want to engage with the destination's nature or culture? Do you stand back and observe? Do you totally immerse yourself by, for example, living in the home of a local? Or are you somewhat in between?*
Basis: All respondents in Germany (n=4,000), Great Britain (n=4,000) and USA (n=4,000); Source: NATA/VG online survey 2016 by NIT/Ipsos

From interest focus & engagement level to the VG segments

<table>
<tr><th></th><th></th><th colspan="4">INTEREST FOCUS</th></tr>
<tr><th></th><th></th><th>Culture</th><th>Culture&Nature</th><th>Nature</th><th>Personal Challenge</th></tr>
<tr><td rowspan="3">ENGAGEMENT LEVEL</td><td>Immersion</td><td>Ethnophile</td><td></td><td>Wilderness Seeker</td><td rowspan="2">Special Interest</td></tr>
<tr><td>Interaction</td><td>Culture Lover</td><td>Globetrotter</td><td>Nature Lover</td></tr>
<tr><td>Observation</td><td>Culture Appreciator</td><td>Sightseer</td><td>Nature Appreciator</td><td></td></tr>
</table>

Q1a: *When you travel in general, is it the destination‘s nature or culture that you want to experience? Or is it something else that motivates you to travel?*
Q1b: *When you travel in general, how close do you want to engage with the destination‘s nature or culture? Do you stand back and observe? Do you totally immerse yourself by, for example, living in the home of a local? Or are you somewhat in between?*

VG Segments in the three markets



- In the population of Germany and Great Britain as well as with all US passport holders, the Globetrotters are the biggest segment, with a share of 28%-33%.
- In Germany, the next important segments are the Sightseers, the Nature Lovers and the Nature Appreciators.
- In Great Britain, the next important segments are the Sightseers, the Culture Lovers and the Culture Appreciators.
- In the USA, the next important segments are the Culture Lovers, the Ethnophiles and the Sightseers.

Q1a: *When you travel in general, is it the destination‘s nature or culture that you want to experience? Or is it something else that motivates you to travel?*
Q1b: *When you travel in general, how close do you want to engage with the destination‘s nature or culture? Do you stand back and observe? Do you totally immerse yourself by, for example, living in the home of a local? Or are you somewhat in between?*
Basis: All respondents in Germany (n=4,000), Great Britain (n=4,000) and USA (n=4,000); Source: NATA/VG online survey 2016 by NIT/Ipsos

VG Segmentation:
Potential Greenland travellers in the three markets

Ethnophile	10%	12%	26%
Culture Lover	2%	11%	12%
Culture Appreciator	2%	3%	1%
Globetrotter	41%	38%	36%
Sightseer	10%	10%	7%
Wilderness Seeker	5%	2%	4%
Nature Lover	14%	8%	4%
Nature Appreciator	7%	3%	1%
Special Interest	5%	7%	6%

- » Focussing on the potential Greenland guests in the three markets, we observe that the Globetrotters become even more dominant, with a share of 36%-41%.
- » In Germany, the next important segments are the Nature Lovers, the Sightseers, and Ethnophiles.
- » In Great Britain, the next important segments are Ethnophiles, Sightseers and Culture Lovers.
- » In the USA, the next important segments are Ethnophiles (26% !!) Culture Lovers and the Sightseers.

Q1a: *When you travel in general, is it the destination's nature or culture that you want to experience? Or is it something else that motivates you to travel?*
Q1b: *When you travel in general, how close do you want to engage with the destination's nature or culture? Do you stand back and observe? Do you totally immerse yourself by, for example, living in the home of a local? Or are you somewhat in between?*
Basis: Potential travellers to Greenland from Germany (n=357), Great Britain (n=469) and the USA (n=739);
Source: NATA/VG online survey 2016 by NIT/Ipsos

To Learn 5: Segmentation of potential travellers to Nordic destinations

- Segmentation approach: The Visit Greenland segmentation approach is based on the two dimensions "interest focus regarding nature and culture when travelling" and the "preferred engagement level". This enables you to identify 9 different segments of tourists (http://corporate.greenland.com/en/tools/segmentation-and-mapping/)
- Interest focus and engagement level: In all three markets, the mix of culture and nature is dominating, as is the "experience" dimension in terms of engagement.
  - In Germany, there are much more people with a "nature" motivation than "culture"; in Great Britain and USA the situation is vice versa.
  - Germany and Great Britain are very similar in their "engagement" structure. In the USA the share of "total immersion" is double as high.
- Segments: Looking at the potential Greenland guests in the three markets, we observe that the Globetrotters are the dominant segment, with a share of 36%-41%.
  - In Germany, the next important segments are the Nature Lovers, the Sightseers, and Ethnophiles.
  - In Great Britain, the next important segments are Ethnophiles, Sightseers and Culture Lovers.
  - In the USA, the next important segments are Ethnophiles (26% !!) Culture Lovers and the Sightseers.

- The Visit Greenland segmentation approach is on the one hand very helpful to further understand the potential Greenland travellers in the three markets, on the other hand it enables us to target the different segments according to their size and needs.
- The segmentation approach helps to learn about what the three markets have in common and which segments are most suited for a differentiation.
- As the product preferences and demographic profiles differ significantly between the segments, it is possible to address the different segments according to their different needs and characteristics.
- You find a detailed analysis of the VG-segments in the three markets on the following pages.

5a. VG-Segments in GERMANY

Photo by Mads Pihl - Visit Greenland

VG Segmentation: Germany (all respondents)

INTEREST FOCUS

ENGAGEMENT LEVEL	Culture	Culture&Nature	Nature	Personal Challenge
Immersion	4% Ethnophile		3% Wilderness Seeker	3% Special Interest
Interaction	4% Culture Lover	33% Globetrotter	13% Nature Lover	
Observation	2% Culture Appreciator	15% Sightseer	10% Nature Appreciator	*14% no segment*

Q1a: *When you travel in general, is it the destination's nature or culture that you want to experience? Or is it something else that motivates you to travel?*
Q1b: *When you travel in general, how close do you want to engage with the destination's nature or culture? Do you stand back and observe? Do you totally immerse yourself by, for example, living in the home of a local? Or are you somewhat in between?*
Basis: All respondents in Germany (n=4,000); Source: NATA online survey 2016 by NIT/Ipsos

VG Segmentation: Germany (potential Greenland travellers)

INTEREST FOCUS

ENGAGEMENT LEVEL	Culture	Culture&Nature	Nature	Personal Challenge
Immersion	10% Ethnophile		4% Wilderness Seeker	5% Special Interest
Interaction	2% Culture Lover	41% Globetrotter	14% Nature Lover	
Observation	2% Culture Appreciator	10% Sightseer	7% Nature Appreciator	*5% no segment*

Q1a: *When you travel in general, is it the destination's nature or culture that you want to experience? Or is it something else that motivates you to travel?*
Q1b: *When you travel in general, how close do you want to engage with the destination's nature or culture? Do you stand back and observe? Do you totally immerse yourself by, for example, living in the home of a local? Or are you somewhat in between?*
Basis: Potential travellers to Greenland from Germany (n=357), Source: NATA online survey 2016 by NIT/Ipsos

VG Segmentation:
Germany (interested in any of the Nordic destinations)

INTEREST FOCUS

ENGAGEMENT LEVEL	Culture	Culture&Nature	Nature	Personal Challenge
Immersion	n=140 Ethnophile		n=98 Wilderness Seeker	n=107 Special Interest
Interaction	n=124 Culture Lover	n=1,154 Globetrotter	n=427 Nature Lover	
Observation	n=55* Culture Appreciator	n=479 Sightseer	n=306 Nature Appreciator	*n=233* *no segment***

* Number of cases too small for further analyses
** Respondents answering „Other“ regarding their interest focus

Q1a: *When you travel in general, is it the destination's nature or culture that you want to experience? Or is it something else that motivates you to travel?*
Q1b: *When you travel in general, how close do you want to engage with the destination's nature or culture? Do you stand back and observe? Do you totally immerse yourself by, for example, living in the home of a local? Or are you somewhat in between?*
Basis: All respondents in Germany interested to travel to any of the 10 Nordic destinations (n=3,123); Source: NATA online survey 2016 by NIT/Ipsos

VG-Segments: Preferred experiences in Nordic destinations

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	*Culture Lover*	*Culture Appreciator*	*Globetrotter*	*Sightseer*	*Wilderness Seeker*	*Nature Lover*	*Nature Appreciator*	
Stunning scenery (e.g. mountains, fjords, cliffs)	61	71	*	**82**	**82**	57	77	**81**	65
Natural phenomena (e.g. Northern Lights, Midnight Sun)	62	66	*	**73**	**71**	44	66	65	60
Wildlife (e.g. whales, birds, polar bears)	47	44	*	**58**	52	46	**54**	53	53
Volcanoes/hot springs/geysers	49	**53**	*	**58**	51	25	48	48	48
Capitals/cities	32	**73**	*	50	50	23	29	27	32
Historic sights/events	34	**54**	*	49	50	22	31	26	32
Glaciers/icebergs	36	39	*	**47**	37	33	43	38	**46**
Traditional villages	**40**	**40**	*	**46**	37	31	39	26	38
New and unexpected experiences	**38**	36	*	37	30	30	30	23	**46**
Contemporary culture/lifestyle	**35**	**51**	*	34	22	18	14	8	17

Q4: *When thinking about travelling to Nordic destination, what would you like to see/experience?*
Basis: All respondents in Germany interested to travel to any of the 10 Nordic destinations (n=3,123) in the segments; definitions: see page 45)
Source: NATA online survey 2016 by NIT/Ipsos

VG-Segments:
Preferred activities in Nordic destinations

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	*Culture Lover*	*Culture Appreciator*	*Globetrotter*	*Sightseer*	*Wilderness Seeker*	*Nature Lover*	*Nature Appreciator*	
experience quietness	42	49	*	58	**65**	42	53	**71**	43
eat/drink local specialities	59	**73**	*	**63**	58	34	52	43	40
guided nature excursions	46	50	*	61	**62**	23	50	55	38
photography	51	57	*	**58**	54	36	50	52	**62**
wildlife watching	46	46	*	**56**	**55**	51	53	53	47
hiking	**54**	37	*	52	41	53	**61**	53	38
meeting with the locals	**50**	41	*	**49**	26	35	38	19	29
swimming/wellness	35	**38**	*	35	35	30	30	**37**	30
learning about local handicraft	33	37	*	**45**	**40**	23	25	18	23
guided cultural tours	25	**50**	*	39	40	16	15	16	23
shopping for souvenirs	19	**42**	*	34	**37**	23	18	28	24
dog-sledding	32	**33**	*	**34**	28	17	28	21	27
glacier hiking	**26**	17	*	**25**	13	19	23	16	20
cycling	**23**	21	*	19	15	**26**	18	18	**23**
kayaking	**18**	12	*	16	6	**18**	14	10	16
horseback riding	**18**	10	*	11	7	**13**	9	8	11
fishing	**12**	3	*	7	4	**12**	10	6	**26**
cold-water diving	8	**9**	*	8	6	7	8	5	**13**
skiing	11	9	*	7	3	**14**	7	2	**12**
trophy hunting	**3**	1	*	2	0	2	1	0	**6**

Q5: *Which of the following activities would you like to do when travelling to Nordic destinations?*
Basis: All respondents in Germany interested to travel to any of the 10 Nordic destinations (n=3,123) in the segments; definitions: see page 45)
Source: NATA online survey 2016 by NIT/Ipsos

VG-Segments: Preferred ways to travel to Nordic destinations

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	*Culture Lover*	*Culture Appreciator*	*Globetrotter*	*Sightseer*	*Wilderness Seeker*	*Nature Lover*	*Nature Appreciator*	
Plane: direct flight	59	**75**	*	**65**	59	40	55	59	57
Plane: round trip, multiple countries	**20**	14	*	16	14	9	12	7	**19**
Plane: Stopover on transatlantic flight	**11**	**7**	*	5	3	6	5	1	6
Cruise: start/end in Continental Europe	12	17	*	**20**	**27**	8	17	**20**	16
Cruise: start/end in the Greenland/Iceland	5	6	*	5	5	**7**	5	2	**8**
Cruise: transatlantic	**5**	1	*	**4**	**4**	1	3	2	3
Car/ferry	24	21	*	22	23	**34**	29	26	**40**
At the destination: Stay at one location	15	23	*	18	25	23	**27**	**33**	22
At the destination: Stay at multiple locations	59	**68**	*	**68**	61	45	58	50	59
excursions to one of the other countries	16	15	*	**18**	**20**	9	12	13	**18**

Q6: How would you like to travel to Nordic destinations?
Basis: All respondents in Germany interested to travel to any of the 10 Nordic destinations (n=3,123) in the segments; definitions: see page 45)
Source: NATA online survey 2016 by NIT/Ipsos

VG-Segments: Preferred sources of inspiration and information when travelling to Nordic destinations

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	*Culture Lover*	*Culture Appreciator*	*Globetrotter*	*Sightseer*	*Wilderness Seeker*	*Nature Lover*	*Nature Appreciator*	
internet search engine	58	61	*	**68**	**71**	51	64	65	60
guide book	45	**54**	*	**53**	50	31	43	40	42
travel agent	21	33	*	39	**44**	14	36	**41**	30
travel magazine	26	**43**	*	**40**	38	27	34	32	38
Personal relations (friend, family, co-worker)	**39**	**38**	*	35	36	26	33	33	30
destination websites (e.g. greenland.com)	20	28	*	**33**	**29**	7	28	24	22
books/literature	**30**	**30**	*	**30**	26	29	25	17	28
holiday review websites (e.g. TripAdvisor)	20	16	*	**26**	**27**	4	21	22	19
online booking agent (e.g. Expedia, Booking.com)	15	21	*	**22**	**26**	10	18	21	13
social media	**16**	**13**	*	11	6	9	10	7	**13**
previous personal knowledge	**17**	10	*	10	6	**17**	11	7	15
newspaper	**16**	**11**	*	8	7	7	7	8	**11**

Q7: *When thinking about travelling to Nordic destinations, how would you like to look for inspiration/information for this trip?*
Basis: All respondents in Germany interested to travel to any of the 10 Nordic destinations (n=3,123) in the segments; definitions: see page 45)
Source: NATA online survey 2016 by NIT/Ipsos

VG-Segments: Preferred online content when looking for information about Nordic travel destinations

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	*Culture Lover*	*Culture Appreciator*	*Globetrotter*	*Sightseer*	*Wilderness Seeker*	*Nature Lover*	*Nature Appreciator*	
Pictures of the destination, its natural/cultural attractions	63	69	*	**73**	**77**	49	65	72	61
Pictures of accommodations/ activities/tours	40	55	*	**56**	**62**	29	51	**62**	51
Texts on how to get there/get around, where to stay, to eat & go shopping	44	47	*	**51**	**52**	31	45	46	39
Videos of nature/landscapes incl. natural phenomena	37	33	*	**42**	35	35	37	**40**	32
Texts from other travellers with recommendations what do there	**36**	31	*	**37**	32	17	31	27	**36**
Contact options, where to find specific information/travel offers	**31**	25	*	**30**	24	16	27	21	23
Texts with stories by locals about their daily life/culture	**31**	24	*	**31**	20	19	21	16	23
Videos about local cultural traditions/lifestyle/art	**35**	26	*	27	23	17	24	15	**32**
Destination companies' newsletters	13	14	*	**18**	16	9	13	12	**17**
Social media posts/stories	**11**	**12**	*	8	6	8	6	6	9

Q8: *Which kind of content do you like to find when looking for online information about Nordic destinations?*
Basis: All respondents in Germany interested to travel to any of the 10 Nordic destinations (n=3,123) in the segments; definitions: see page 45)
Source: NATA online survey 2016 by NIT/Ipsos

VG-Segments: Age/Gender

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	*Culture Lover*	*Culture Appreciator*	*Globetrotter*	*Sightseer*	*Wilderness Seeker*	*Nature Lover*	*Nature Appreciator*	
16-19 years	9	**13**	*	6	3	9	5	5	**13**
20-29 years	**34**	**28**	*	20	11	21	17	13	19
30-39 years	16	14	*	16	15	**23**	20	18	**23**
40-49 years	19	19	*	19	**24**	**21**	23	**24**	17
50-59 years	13	17	*	22	**25**	14	20	**26**	13
60-70 years	10	10	*	**17**	**22**	12	15	15	15
Average (years)	*37,1*	*37,8*	*	*43,0*	*47,4*	*39,3*	*42,4*	*44,4*	*39,5*
Male	**60**	48	*	48	40	53	55	44	**65**
Female	40	52	*	52	**60**	47	45	**56**	35

Basis: All respondents in Germany interested to travel to any of the 10 Nordic destinations (n=3,123) in the segments; definitions: see page 45)
Source: NATA online survey 2016 by NIT/Ipsos

VG-Segments: Education/Marital status

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	*Culture Lover*	*Culture Appreciator*	*Globetrotter*	*Sightseer*	*Wilderness Seeker*	*Nature Lover*	*Nature Appreciator*	
Education: low	5	2	*	4	**6**	**6**	5	**8**	**6**
Education: middle	35	22	*	40	**52**	46	45	**53**	46
Education: high without university	34	**40**	*	31	23	**36**	30	28	32
Education: university	**26**	**35**	*	**26**	19	12	20	12	16
married / with partner	50	46	*	62	67	52	**68**	**69**	47
single	36	**49**	*	28	22	**38**	26	22	42
previously married, no partner in household	**14**	4	*	10	**12**	10	7	9	11

Basis: All respondents in Germany interested to travel to any of the 10 Nordic destinations (n=3,123) in the segments; definitions: see page 45)
Source: NATA online survey 2016 by NIT/Ipsos

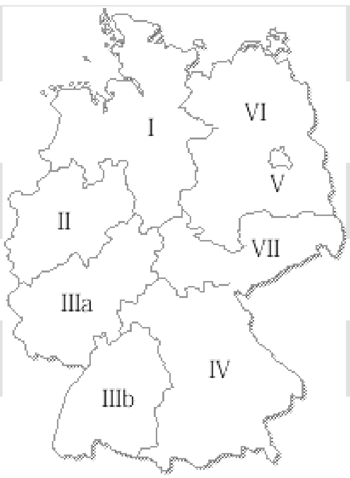
VG-Segments: Monthly household net income

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	*Culture Lover*	*Culture Appreciator*	*Globetrotter*	*Sightseer*	*Wilderness Seeker*	*Nature Lover*	*Nature Appreciator*	
up to 1,000 Euro	**11**	6	*	8	9	4	8	8	**13**
1,001 - 2,000 Euro	**31**	30	*	22	29	**47**	24	26	21
2,001 - 3,000 Euro	27	25	*	31	**32**	18	30	**35**	29
3,001 - 4,000 Euro	**21**	17	*	**21**	15	**21**	**22**	15	14
4,001 - 5,000 Euro	5	**12**	*	9	11	4	10	9	11
5,001 Euro or more	5	10	*	8	5	7	6	6	**12**

Basis: All respondents in Germany interested to travel to any of the 10 Nordic destinations with response regarding their income (n=2,661) in the segments; definitions: see page 45); Source: NATA online survey 2016 by NIT/Ipsos

VG-Segments: Nielsen regions

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	*Culture Lover*	*Culture Appreciator*	*Globetrotter*	*Sightseer*	*Wilderness Seeker*	*Nature Lover*	*Nature Appreciator*	
I	**21**	16	*	15	**20**	18	15	17	17
II	21	20	*	21	**22**	21	21	**24**	21
IIIa	11	**14**	*	13	13	13	**16**	**16**	**16**
IIIb	11	12	*	**15**	11	12	14	13	**15**
IV	**18**	**19**	*	16	16	19	14	11	13
V	3	3	*	**6**	**4**	2	3	**4**	2
VI	9	**10**	*	7	5	8	**10**	**10**	8
VII	5	7	*	7	**9**	7	7	7	**9**



Basis: All respondents in Germany interested to travel to any of the 10 Nordic destinations (n=3,123) in the segments; definitions: see page 45)
Source: NATA online survey 2016 by NIT/Ipsos


5b. VG-Segments in GREAT BRITAIN
Photo by Mads Pihl - Visit Greenland

VG Segmentation: Great Britain (all respondents)

NIT NEW INSIGHTS FOR TOURISM

INTEREST FOCUS

ENGAGEMENT LEVEL	Culture	Culture&Nature	Nature	Personal Challenge
Immersion	5% Ethnophile		1% Wilderness Seeker	5% Special Interest
Interaction	12% Culture Lover	27% Globetrotter	5% Nature Lover	
Observation	7% Culture Appreciator	13% Sightseer	5% Nature Appreciator	*19% no segment*

Q1a: *When you travel in general, is it the destination's nature or culture that you want to experience? Or is it something else that motivates you to travel?*
Q1b: *When you travel in general, how close do you want to engage with the destination's nature or culture? Do you stand back and observe? Do you totally immerse yourself by, for example, living in the home of a local? Or are you somewhat in between?*
Basis: All respondents in Great Britain (n=4,000); Source: VG online survey 2016 by NIT/Ipsos

VG Segmentation: Great Britain (potential Greenland travellers)

INTEREST FOCUS

ENGAGEMENT LEVEL	Culture	Culture&Nature	Nature	Personal Challenge
Immersion	12% Ethnophile		2% Wilderness Seeker	7% Special Interest
Interaction	11% Culture Lover	38% Globetrotter	8% Nature Lover	
Observation	3% Culture Appreciator	10% Sightseer	3% Nature Appreciator	*6% no segment*

Q1a: *When you travel in general, is it the destination's nature or culture that you want to experience? Or is it something else that motivates you to travel?*
Q1b: *When you travel in general, how close do you want to engage with the destination's nature or culture? Do you stand back and observe? Do you totally immerse yourself by, for example, living in the home of a local? Or are you somewhat in between?*
Basis: Potential travellers to Greenland from Great Britain (n=469); Source: VG online survey 2016 by NIT/Ipsos

VG Segmentation:
Great Britain (interested in any of the Nordic destinations)

INTEREST FOCUS

ENGAGEMENT LEVEL	Culture	Culture&Nature	Nature	Personal Challenge
Immersion	n=166 Ethnophile		n=35* Wilderness Seeker	n=144 Special Interest
Interaction	n=397 Culture Lover	n=929 Globetrotter	n=167 Nature Lover	
Observation	n=191 Culture Appreciator	n=368 Sightseer	n=137 Nature Appreciator	*n=291 no segment***

* Number of cases too small for further analyses
** Respondents answering „Other“ regarding their interest focus

Q1a: *When you travel in general, is it the destination's nature or culture that you want to experience? Or is it something else that motivates you to travel?*
Q1b: *When you travel in general, how close do you want to engage with the destination's nature or culture? Do you stand back and observe? Do you totally immerse yourself by, for example, living in the home of a local? Or are you somewhat in between?*
Basis: All respondents in Great Britain interested to travel to any of the 10 Nordic destinations (n=2,825); Source: VG online survey 2016 by NIT/Ipsos

VG-Segments: Preferred experiences in Nordic destinations

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	*Culture Lover*	*Culture Appreciator*	*Globetrotter*	*Sightseer*	*Wilderness Seeker*	*Nature Lover*	*Nature Appreciator*	
Stunning scenery (e.g. mountains, fjords, cliffs)	74	79	83	**84**	**86**	*	77	**84**	72
Natural phenomena (e.g. Northern Lights, Midnight Sun)	73	**81**	73	82	**85**	*	76	80	64
Wildlife (e.g. whales, birds, polar bears)	68	51	49	**71**	**74**	*	67	66	58
Volcanoes/hot springs/geysers	60	66	59	**68**	**71**	*	57	60	56
glaciers/icebergs	**63**	61	44	**65**	60	*	53	53	51
historic sights/events	51	**56**	49	**57**	55	*	37	38	35
capitals/cities	50	**60**	**63**	51	51	*	26	23	33
new and unexpected experiences	**55**	46	36	**56**	42	*	35	26	40
traditional villages	**58**	46	41	**54**	49	*	30	27	34
contemporary culture/lifestyle	**52**	**53**	43	**53**	40	*	20	14	27

Q4: *When thinking about travelling to Nordic destination, what would you like to see/experience?*
Basis: All respondents in Great Britain interested to travel to any of the 10 Nordic destinations (n=2,825) in the segments; definitions: see page 58)
Source: VG online survey 2016 by NIT/Ipsos

VG-Segments: Preferred activities in Nordic destinations

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	*Culture Lover*	*Culture Appreciator*	*Globetrotter*	*Sightseer*	*Wilderness Seeker*	*Nature Lover*	*Nature Appreciator*	
eat/drink local specialities	72	71	66	71	56	*	52	38	50
wildlife watching	56	44	48	66	67	*	66	62	56
guided nature excursions	45	39	33	55	56	*	57	50	39
shopping for souvenirs	35	47	59	50	53	*	35	39	30
experience quietness	45	36	47	49	54	*	43	54	36
swimming/wellness	47	48	35	51	48	*	40	34	32
meeting with the locals	51	45	35	51	35	*	31	23	38
photography	49	33	31	47	38	*	46	45	53
guided cultural tours	38	52	54	47	47	*	20	14	20
learning about local handicraft	44	30	34	42	37	*	29	26	26
dog-sledding	34	32	23	38	25	*	29	21	28
hiking	39	22	15	36	20	*	36	29	23
glacier hiking	39	17	7	23	12	*	24	12	18
horseback riding	18	12	7	17	10	*	18	9	15
cycling	18	11	9	17	9	*	16	13	20
kayaking	21	10	5	15	8	*	14	9	12
skiing	20	13	7	14	9	*	7	5	19
fishing	15	6	4	9	7	*	6	7	24
cold-water diving	16	6	1	6	1	*	6	3	7
trophy hunting	4	1	1	1	1	*	1	-	3

Q5: *Which of the following activities would you like to do when travelling to Nordic destinations?*
Basis: All respondents in Great Britain interested to travel to any of the 10 Nordic destinations (n=2,825) in the segments; definitions: see page 58)
Source: VG online survey 2016 by NIT/Ipsos

VG-Segments:
Preferred ways to travel to Nordic destinations

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	*Culture Lover*	*Culture Appreciator*	*Globetrotter*	*Sightseer*	*Wilderness Seeker*	*Nature Lover*	*Nature Appreciator*	
Plane: direct flight	78	**86**	**86**	**85**	81	*	79	**85**	75
Plane: round trip, multiple countries	**22**	12	11	**17**	**17**	*	11	5	12
Plane: Stopover on transatlantic flight	6	9	8	8	**10**	*	6	5	**10**
Cruise: start/end in Continental Europe	16	14	18	**20**	**25**	*	17	13	14
Cruise: start/end in the Greenland/Iceland	5	4	5	**8**	7	*	6	3	**10**
Cruise: transatlantic	3	3	4	5	**7**	*	1	1	**5**
Car/ferry	**14**	5	7	10	9	*	12	6	**13**
At the destination: Stay at one location	23	43	**53**	37	**44**	*	35	**44**	31
At the destination: Stay at multiple locations	**56**	53	41	**57**	48	*	44	41	46
excursions to one of the other countries	18	16	16	**22**	**21**	*	15	12	16

Q6: How would you like to travel to Nordic destinations?
Basis: All respondents in Great Britain interested to travel to any of the 10 Nordic destinations (n=2,825) in the segments; definitions: see page 58)
Source: VG online survey 2016 by NIT/Ipsos

VG-Segments: Preferred sources of inspiration and information when travelling to Nordic destinations

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	*Culture Lover*	*Culture Appreciator*	*Globetrotter*	*Sightseer*	*Wilderness Seeker*	*Nature Lover*	*Nature Appreciator*	
internet search engine	68	**78**	**79**	77	**79**	*	70	74	73
destination websites (e.g. greenland.com)	45	**49**	43	**57**	**57**	*	48	46	43
holiday review websites (e.g. TripAdvisor)	32	47	**51**	**50**	45	*	33	42	27
guide book	**47**	44	42	45	**46**	*	34	30	38
travel magazine	32	27	27	**35**	**38**	*	27	27	28
travel agent	15	24	27	29	**34**	*	**30**	27	29
books/literature	**34**	26	28	**31**	28	*	25	18	25
personal relations (friend, family, co-worker)	22	**34**	23	**28**	**28**	*	23	21	24
online booking agent (e.g. Expedia, booking.com)	24	**26**	22	**29**	20	*	21	17	21
social media	**21**	**20**	14	17	15	*	16	12	**20**
newspaper	**14**	10	11	**12**	11	*	7	3	8
previous personal knowledge	**11**	**10**	5	9	4	*	7	7	8

Q7: *When thinking about travelling to Nordic destinations, how would you like to look for inspiration/information for this trip?*
Basis: All respondents in Great Britain interested to travel to any of the 10 Nordic destinations (n=2,825) in the segments; definitions: see page 58)
Source: VG online survey 2016 by NIT/Ipsos

VG-Segments: Preferred online content when looking for information about Nordic travel destinations

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	*Culture Lover*	*Culture Appreciator*	*Globetrotter*	*Sightseer*	*Wilderness Seeker*	*Nature Lover*	*Nature Appreciator*	
Pictures of the destination, its natural/cultural attractions	76	79	**83**	82	**88**	*	73	81	69
Pictures of accommodations/ activities/tours	63	70	**73**	71	**76**	*	54	64	60
Texts on how to get there/get around, where to stay, to eat & go shopping	42	55	**59**	**56**	**56**	*	45	43	48
Videos of nature/landscapes incl. natural phenomena	**48**	34	31	**46**	**48**	*	**48**	**46**	45
Texts from other travellers with recommendations what do there	39	**46**	42	**47**	44	*	39	33	36
Contact options, where to find specific information/travel offers	30	34	32	**43**	**38**	*	33	30	31
Videos about local cultural traditions/lifestyle/art	**41**	22	24	**35**	31	*	26	13	33
Texts with stories by locals about their daily life/culture	**37**	32	20	**34**	25	*	27	9	25
Destination companies' newsletters	**24**	19	21	**28**	24	*	21	15	17
Social media posts/stories	16	**17**	13	**17**	15	*	**19**	11	11

Q8: *Which kind of content do you like to find when looking for online information about Nordic destinations?*
Basis: All respondents in Germany interested to travel to any of the 10 Nordic destinations (n=2,825) in the segments; definitions: see page 58)
Source: VG online survey 2016 by NIT/Ipsos

VG-Segments: Age/Gender

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	*Culture Lover*	*Culture Appreciator*	*Globetrotter*	*Sightseer*	*Wilderness Seeker*	*Nature Lover*	*Nature Appreciator*	
16-19 years	3	**6**	2	3	3	*	3	3	**6**
20-29 years	**26**	**29**	14	23	14	*	25	19	20
30-39 years	**22**	18	18	20	14	*	**23**	21	12
40-49 years	19	19	**24**	18	**21**	*	19	14	20
50-59 years	17	17	**23**	19	21	*	14	**23**	**22**
60-75 years	13	11	19	17	**27**	*	16	**20**	**20**
Average (years)	*40,3*	*39,0*	*45,5*	*42,3*	*47,2*	*	*41,6*	*44,4*	*43,8*
Male	**56**	43	43	46	42	*	53	52	**73**
Female	44	**58**	**57**	54	**58**	*	47	48	27

Basis: All respondents in Great Britain interested to travel to any of the 10 Nordic destinations (n=2,825) in the segments; definitions: see page 58)
Source: VG online survey 2016 by NIT/Ipsos

VG-Segments: Education/Marital status

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	*Culture Lover*	*Culture Appreciator*	*Globetrotter*	*Sightseer*	*Wilderness Seeker*	*Nature Lover*	*Nature Appreciator*	
primary/ secondary school	7	2	5	4	7	*	**9**	6	**8**
GNVQ/GSVQ/GCSE/SCE standard	14	14	17	15	**25**	*	18	**25**	**21**
NVQ1/NVQ2	7	**8**	7	7	**9**	*	7	**8**	**9**
NVQ3/SCE higher grade/advanced GNVQ/GCE A/AS or similar	19	23	**28**	24	25	*	21	21	**26**
NVQ4/HNC/HND/Bachelor's degree or similar	33	**36**	**34**	**36**	25	*	32	27	28
NVQ5 or post-graduate diploma	**20**	**17**	9	15	9	*	13	13	8
married / with partner	57	51	56	60	**66**	*	**64**	62	53
single	35	**41**	34	32	24	*	30	26	**39**
previously married, no partner in household	8	8	**10**	9	**10**	*	7	**12**	8

Basis: All respondents in Great Britain interested to travel to any of the 10 Nordic destinations (n=2,825) in the segments; definitions: see page 58)
Source: VG online survey 2016 by NIT/Ipsos

VG-Segments: Annual household net income

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	*Culture Lover*	*Culture Appreciator*	*Globetrotter*	*Sightseer*	*Wilderness Seeker*	*Nature Lover*	*Nature Appreciator*	
up tp - 9,999 pounds	6	5	6	6	7	*	8	**9**	**10**
10,000 - 19,999 pounds	19	12	16	16	21	*	**23**	19	**26**
20,000 - 24,999 pounds	**12**	9	**13**	10	**13**	*	**13**	8	9
25,000 - 34,999 pounds	**21**	19	**21**	20	20	*	18	**25**	15
35,000 - 44,999 pounds	12	15	**18**	15	14	*	14	**17**	11
45,000 - 54,999 pounds	12	**18**	**15**	14	11	*	10	11	11
55,000 pounds or more	18	**21**	11	**20**	14	*	14	11	18

Basis: All respondents in Great Britain interested to travel to any of the 10 Nordic destinations with response regarding their income (n=2,513) in the segments; definitions: see page 58); Source: VG online survey 2016 by NIT/Ipsos

VG-Segments: Regions

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	*Culture Lover*	*Culture Appreciator*	*Globetrotter*	*Sightseer*	*Wilderness Seeker*	*Nature Lover*	*Nature Appreciator*	
North East	**5**	**5**	3	3	**5**	*	3	**4**	2
North West	7	8	**16**	**11**	9	*	10	**11**	10
Yorkshire and The Humber	9	8	**14**	**9**	**9**	*	6	5	5
West Midlands	**10**	8	**10**	8	9	*	**12**	8	9
East Midlands	7	5	5	7	8	*	**10**	8	**9**
East of England	7	8	8	9	**11**	*	9	**13**	9
South West	**13**	8	7	**10**	8	*	9	**10**	9
South East	11	14	12	**16**	**16**	*	**16**	14	**15**
Greater London	**19**	**19**	13	**16**	13	*	14	14	12
Wales	4	**7**	5	4	6	*	4	**8**	**7**
Scotland	8	**10**	9	9	7	*	7	6	**14**

Basis: All respondents in Great Britain interested to travel to any of the 10 Nordic destinations (n=2,825) in the segments; definitions: see page 58)
Source: VG online survey 2016 by NIT/Ipsos

5c. VG-Segments in USA

Photo by Mads Pihl - Visit Greenland

VG Segmentation: USA (all respondents)

NIT NEW INSIGHTS FOR TOURISM

INTEREST FOCUS

ENGAGEMENT LEVEL	Culture	Culture&Nature	Nature	Personal Challenge
Immersion	11% Ethnophile		2% Wilderness Seeker	7% Special Interest
Interaction	14% Culture Lover	30% Globetrotter	5% Nature Lover	
Observation	4% Culture Appreciator	10% Sightseer	4% Nature Appreciator	*12% no segment*

Q1a: *When you travel in general, is it the destination‘s nature or culture that you want to experience? Or is it something else that motivates you to travel?*
Q1b: *When you travel in general, how close do you want to engage with the destination‘s nature or culture? Do you stand back and observe? Do you totally immerse yourself by, for example, living in the home of a local? Or are you somewhat in between?*
Basis: All respondents in USA (n=4,000); Source: VG online survey 2016 by NIT/Ipsos

VG Segmentation: USA (potential Greenland travellers)

INTEREST FOCUS

ENGAGEMENT LEVEL	Culture	Culture&Nature	Nature	Personal Challenge
Immersion	26% Ethnophile		4% Wilderness Seeker	6% Special Interest
Interaction	12% Culture Lover	36% Globetrotter	4% Nature Lover	
Observation	1% Culture Appreciator	7% Sightseer	1% Nature Appreciator	*4% no segment*

Q1a: *When you travel in general, is it the destination's nature or culture that you want to experience? Or is it something else that motivates you to travel?*
Q1b: *When you travel in general, how close do you want to engage with the destination's nature or culture? Do you stand back and observe? Do you totally immerse yourself by, for example, living in the home of a local? Or are you somewhat in between?*
Basis: Potential travellers to Greenland from USA (n=739); Source: VG online survey 2016 by NIT/Ipsos

VG Segmentation:
USA (interested in any of the Nordic destinations)

INTEREST FOCUS

ENGAGEMENT LEVEL	Culture	Culture&Nature	Nature	Personal Challenge
Immersion	n=431 Ethnophile		n=64* Wilderness Seeker	n=230 Special Interest
Interaction	n=502 Culture Lover	n=1,078 Globetrotter	n=167 Nature Lover	
Observation	n=117 Culture Appreciator	n=335 Sightseer	n=123 Nature Appreciator	*n=282* *no segment***

* Number of cases too small for further analyses
** Respondents answering „Other“ regarding their interest focus

Q1a: *When you travel in general, is it the destination‘s nature or culture that you want to experience? Or is it something else that motivates you to travel?*
Q1b: *When you travel in general, how close do you want to engage with the destination‘s nature or culture? Do you stand back and observe? Do you totally immerse yourself by, for example, living in the home of a local? Or are you somewhat in between?*
Basis: All respondents in USA interested to travel to any of the 10 Nordic destinations (n=3,329); Source: VG online survey 2016 by NIT/Ipsos

VG-Segments:
Preferred experiences in Nordic destinations

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	*Culture Lover*	*Culture Appreciator*	*Globetrotter*	*Sightseer*	*Wilderness Seeker*	*Nature Lover*	*Nature Appreciator*	
Stunning scenery (e.g. mountains, fjords, cliffs)	55	75	69	76	**80**	*	74	**90**	59
Natural phenomena (e.g. Northern Lights, Midnight Sun)	50	69	60	70	**74**	*	64	**71**	55
Wildlife (e.g. whales, birds, polar bears)	48	56	48	63	**70**	*	65	**75**	62
glaciers/icebergs	49	53	54	57	**60**	*	57	**61**	49
new and unexpected experiences	41	**43**	35	**49**	**43**	*	42	39	40
historic sights/events	36	40	37	**43**	**51**	*	27	35	34
volcanoes/hot springs/geysers	32	**43**	34	**44**	38	*	40	**44**	31
traditional villages	**41**	**41**	25	**44**	40	*	29	30	27
contemporary culture/lifestyle	**38**	35	27	**36**	30	*	16	19	30
capitals/cities	27	**30**	20	**26**	25	*	14	8	18

Q4: *When thinking about travelling to Nordic destination, what would you like to see/experience?*
Basis: All respondents in USA interested to travel to any of the 10 Nordic destinations (n=3,329) in the segments; definitions: see page 71)
Source: VG online survey 2016 by NIT/Ipsos

VG-Segments: Preferred activities in Nordic destinations

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	*Culture Lover*	*Culture Appreciator*	*Globetrotter*	*Sightseer*	*Wilderness Seeker*	*Nature Lover*	*Nature Appreciator*	
wildlife watching	47	54	56	65	**68**	*	64	**80**	53
guided nature excursions	53	53	58	63	**68**	*	50	**69**	46
eat/drink local specialities	53	**60**	47	**58**	46	*	39	40	47
photography	43	38	35	**48**	**46**	*	**46**	**46**	**48**
hiking	42	35	24	**45**	31	*	**51**	42	35
shopping for souvenirs	29	39	39	**41**	**44**	*	36	39	33
guided cultural tours	42	**45**	**47**	42	42	*	21	16	25
experience quietness	29	36	31	**43**	40	*	**41**	**41**	35
meeting with the locals	31	**44**	34	**41**	35	*	23	18	30
learning about local handicraft	29	**34**	26	**35**	33	*	22	22	20
swimming/wellness	23	**30**	18	**34**	18	*	29	22	24
fishing	23	19	15	21	19	*	**26**	21	**36**
glacier hiking	21	20	13	**27**	18	*	20	**22**	19
dog-sledding	**23**	**21**	14	**23**	19	*	19	16	17
horseback riding	**23**	18	7	**21**	18	*	19	11	13
kayaking	**23**	15	6	**22**	12	*	20	17	18
skiing	**18**	9	5	**11**	6	*	8	5	**18**
cycling	**18**	10	3	**11**	9	*	10	5	9
cold-water diving	**13**	3	1	**6**	3	*	3	1	5
trophy hunting	**8**	2	1	3	3	*	3	3	**9**

Q5: *Which of the following activities would you like to do when travelling to Nordic destinations?*
Basis: All respondents in USA interested to travel to any of the 10 Nordic destinations (n=3,329) in the segments; definitions: see page 71)
Source: VG online survey 2016 by NIT/Ipsos

VG-Segments:
Preferred ways to travel to Nordic destinations

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	*Culture Lover*	*Culture Appreciator*	*Globetrotter*	*Sightseer*	*Wilderness Seeker*	*Nature Lover*	*Nature Appreciator*	
Plane: direct flight	63	**72**	**64**	63	58	*	56	59	63
Plane: round trip, multiple countries	**37**	**31**	8	30	18	*	18	8	19
Plane: Stopover on transatlantic flight	**20**	**15**	6	13	6	*	13	5	9
Cruise: start/end in Continental Europe	27	30	44	35	**47**	*	**48**	**48**	33
Cruise: start/end in the Greenland/Iceland	11	6	7	11	**13**	*	**12**	3	9
Cruise: transatlantic	7	6	**8**	6	**9**	*	5	2	6
Car/ferry	**13**	8	8	9	10	*	9	**12**	**12**
At the destination: Stay at one location	26	**29**	27	20	25	*	19	24	25
At the destination: Stay at multiple locations	46	59	59	**66**	**67**	*	59	63	55
excursions to one of the other countries	18	**23**	20	**24**	18	*	17	14	15

Q6: How would you like to travel to Nordic destinations?
Basis: All respondents in USA interested to travel to any of the 10 Nordic destinations (n=3,329) in the segments; definitions: see page 71)
Source: VG online survey 2016 by NIT/Ipsos

VG-Segments: Preferred sources of inspiration and information when travelling to Nordic destinations

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	*Culture Lover*	*Culture Appreciator*	*Globetrotter*	*Sightseer*	*Wilderness Seeker*	*Nature Lover*	*Nature Appreciator*	
internet search engine	52	**71**	58	69	67	*	63	**76**	57
destination websites (e.g. greenland.com)	39	**56**	47	**58**	**56**	*	45	**58**	42
travel magazine	**46**	40	39	**47**	44	*	39	35	40
guide book	41	**45**	**45**	44	**51**	*	36	**45**	35
holiday review websites (e.g. TripAdvisor)	24	40	32	**44**	**42**	*	39	41	30
personal relations (friend, family, co-worker)	29	**37**	**36**	35	33	*	35	28	33
travel agent	22	22	**37**	29	**36**	*	24	34	30
books/literature	**34**	27	20	28	**30**	*	19	23	22
online booking agent (e.g. Expedia, booking.com)	17	**20**	14	**24**	18	*	16	18	14
social media	**23**	18	10	21	10	*	**19**	13	17
previous personal knowledge	**17**	9	8	9	14	*	12	11	**16**
newspaper	**21**	6	6	6	5	*	5	2	11

Q7: *When thinking about travelling to Nordic destinations, how would you like to look for inspiration/information for this trip?*
Basis: All respondents in USA interested to travel to any of the 10 Nordic destinations (n=3,329) in the segments; definitions: see page 71)
Source: VG online survey 2016 by NIT/Ipsos

VG-Segments: Preferred online content when looking for information about Nordic travel destinations

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	*Culture Lover*	*Culture Appreciator*	*Globetrotter*	*Sightseer*	*Wilderness Seeker*	*Nature Lover*	*Nature Appreciator*	
Pictures of the destination, its natural/cultural attractions	70	72	74	**78**	77	*	71	**84**	63
Pictures of accommodations/ activities/tours	53	68	67	69	**71**	*	63	**79**	56
Texts on how to get there/get around, where to stay, to eat & go shopping	43	**53**	**55**	**53**	**53**	*	47	48	37
Videos of nature/landscapes incl. natural phenomena	43	32	37	**48**	41	*	35	**46**	37
Texts from other travellers with recommendations what do there	37	**43**	35	**45**	41	*	**43**	**45**	30
Contact options, where to find specific information/travel offers	33	36	**41**	**41**	**46**	*	36	39	32
Videos about local cultural traditions/lifestyle/art	**38**	31	28	**36**	29	*	17	13	26
Texts with stories by locals about their daily life/culture	**32**	27	26	**33**	24	*	19	16	20
Destination companies' newsletters	20	22	23	**24**	**26**	*	20	19	19
Social media posts/stories	**17**	**17**	11	**18**	13	*	15	11	16

Q8: *Which kind of content do you like to find when looking for online information about Nordic destinations?*
Basis: All respondents in USA interested to travel to any of the 10 Nordic destinations (n=3,329) in the segments; definitions: see page 71)
Source: VG online survey 2016 by NIT/Ipsos

VG-Segments:
IMAGE of Greenland as a holiday destination

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	Culture Lover	Culture Appreciator	Globetrotter	Sightseer	Wilderness Seeker	Nature Lover	Nature Appreciator	
stunning scenery	59	65	66	**68**	**70**	*	67	67	60
unspoiled nature	58	60	**66**	**65**	61	*	61	61	55
not too touristic	41	54	**58**	52	49	*	51	**56**	39
quietness	49	**53**	52	51	48	*	49	**57**	44
special natural phenomena	41	44	**50**	48	**51**	*	40	40	40
wildlife viewing	33	39	29	43	44	*	41	47	32
new experiences	35	31	31	**41**	**36**	*	30	32	34
must-see destination	**31**	27	21	**38**	**31**	*	29	27	26
difficult to reach	21	30	**40**	29	32	*	33	**34**	27
interesting culture and history	**37**	23	26	**32**	31	*	21	22	25
hospitable people	**29**	23	21	**31**	25	*	24	24	**29**
see Arctic before the ice melts	**25**	23	18	**25**	24	*	**26**	20	20
only suitable in summer	12	22	**26**	20	25	*	17	**29**	19
great variety of snow activities	18	**21**	20	**21**	**23**	*	18	20	20
a place to feel free	**26**	19	17	20	17	*	**23**	16	20
expensive destination	17	17	17	19	**26**	*	18	**23**	19
changeable weather	14	16	12	**21**	**23**	*	19	19	**21**
summer outdoor activities	**18**	11	12	**17**	13	*	12	17	14
opportunities for wellness	**19**	11	11	**17**	11	*	11	12	13
traditional Inuit way of life	**17**	14	10	**15**	14	*	12	12	9
delicious local cuisine	**21**	12	10	**13**	12	*	12	8	11

Q3a: *Please tell me which of these characteristics do you think particularly apply to Greenland?*
Basis: All respondents in USA, aware of Greenland as a travel destination (n=3,398) in the segments; definitions: see page 71)
Source: VG online survey 2016 by NIT/Ipsos

VG-Segments: Age/Gender

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	*Culture Lover*	*Culture Appreciator*	*Globetrotter*	*Sightseer*	*Wilderness Seeker*	*Nature Lover*	*Nature Appreciator*	
16-19 years	5	**6**	-	5	2	*	3	3	**8**
20-29 years	**26**	**22**	8	21	10	*	20	13	18
30-39 years	**38**	21	10	22	13	*	**23**	15	19
40-49 years	13	**17**	15	**17**	16	*	**21**	11	16
50-59 years	11	15	**18**	15	17	*	17	**21**	14
60-70 years	7	20	**49**	20	**43**	*	17	37	25
Average (years)	*36,9*	*42,3*	*55,4*	*42,7*	*52,4*	*	*42,8*	*50,3*	*43,9*
Male	57	40	**64**	42	56	*	44	46	**59**
Female	44	**60**	36	**58**	44	*	56	55	41

Basis: All respondents in USA interested to travel to any of the 10 Nordic destinations (n=3,329) in the segments; definitions: see page 71)
Source: VG online survey 2016 by NIT/Ipsos

VG-Segments: Education/Marital status

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	*Culture Lover*	*Culture Appreciator*	*Globetrotter*	*Sightseer*	*Wilderness Seeker*	*Nature Lover*	*Nature Appreciator*	
up to grade 12 (no diploma)	**2**	1	-	1	1	*	1	1	**2**
regular high school diploma/ GED or similar	6	6	5	7	11	*	**13**	10	**12**
some collage credit, no degree	19	17	14	**22**	**23**	*	18	**23**	18
associate's degree (AA, AS etc.)	8	8	12	11	**14**	*	9	**13**	12
bachelor's degree (MA, MS, MBA etc.)	**40**	39	**43**	38	34	*	39	38	36
master's/professional/ doctorate degree	**26**	**30**	**26**	22	18	*	20	16	21
married / with partner	61	58	68	63	**67**	*	65	**71**	59
single	**33**	**33**	17	29	21	*	23	19	29
previously married, no partner in household	6	10	**15**	8	12	*	**13**	11	12

Basis: All respondents in USA interested to travel to any of the 10 Nordic destinations (n=3,329) in the segments; definitions: see page 71)
Source: VG online survey 2016 by NIT/Ipsos

VG-Segments: Monthly household net income

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	*Culture Lover*	*Culture Appreciator*	*Globetrotter*	*Sightseer*	*Wilderness Seeker*	*Nature Lover*	*Nature Appreciator*	
under 25,000 dollar	**12**	9	9	**12**	8	*	**12**	9	**13**
25,000 - 49,999 dollar	18	**20**	16	**20**	17	*	**19**	12	**20**
50,000 - 59,999 dollar	6	9	8	11	**16**	*	7	**13**	10
60,000 - 69,999 dollar	**11**	7	**15**	8	10	*	10	10	**11**
70,000 - 79,999 dollar	**14**	11	6	9	11	*	10	**16**	12
80,000 - 99,999 dollar	13	10	**17**	13	**15**	*	**15**	11	10
100,000 - 149,999 dollar	17	**22**	20	17	16	*	18	**21**	16
150,000 dollar or more	9	**12**	**10**	**10**	7	*	9	7	9

Basis: All respondents in USA interested to travel to any of the 10 Nordic destinations with response regarding their income (n=3,080) in the segments; definitions: see page 71) in the segments; definitions: see page 68); Source: VG online survey 2016 by NIT/Ipsos

VG-Segments: Regions

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	*Culture Lover*	*Culture Appreciator*	*Globetrotter*	*Sightseer*	*Wilderness Seeker*	*Nature Lover*	*Nature Appreciator*	
New England	4	6	**7**	4	5	*	4	**6**	3
Middle Atlantic	**19**	12	**15**	13	9	*	11	12	**15**
East North Central	10	**17**	14	15	14	*	**17**	**19**	16
West North Central	8	5	4	7	6	*	**10**	**9**	1
South Atlantic	18	**21**	17	19	**21**	*	**20**	13	**20**
East South Central	6	**7**	5	6	6	*	4	**8**	5
West South Central	11	10	**13**	**13**	10	*	9	12	**15**
Mountain	6	7	**10**	7	**9**	*	**9**	**9**	**10**
Pacific	**17**	14	15	**17**	**20**	*	**17**	12	15

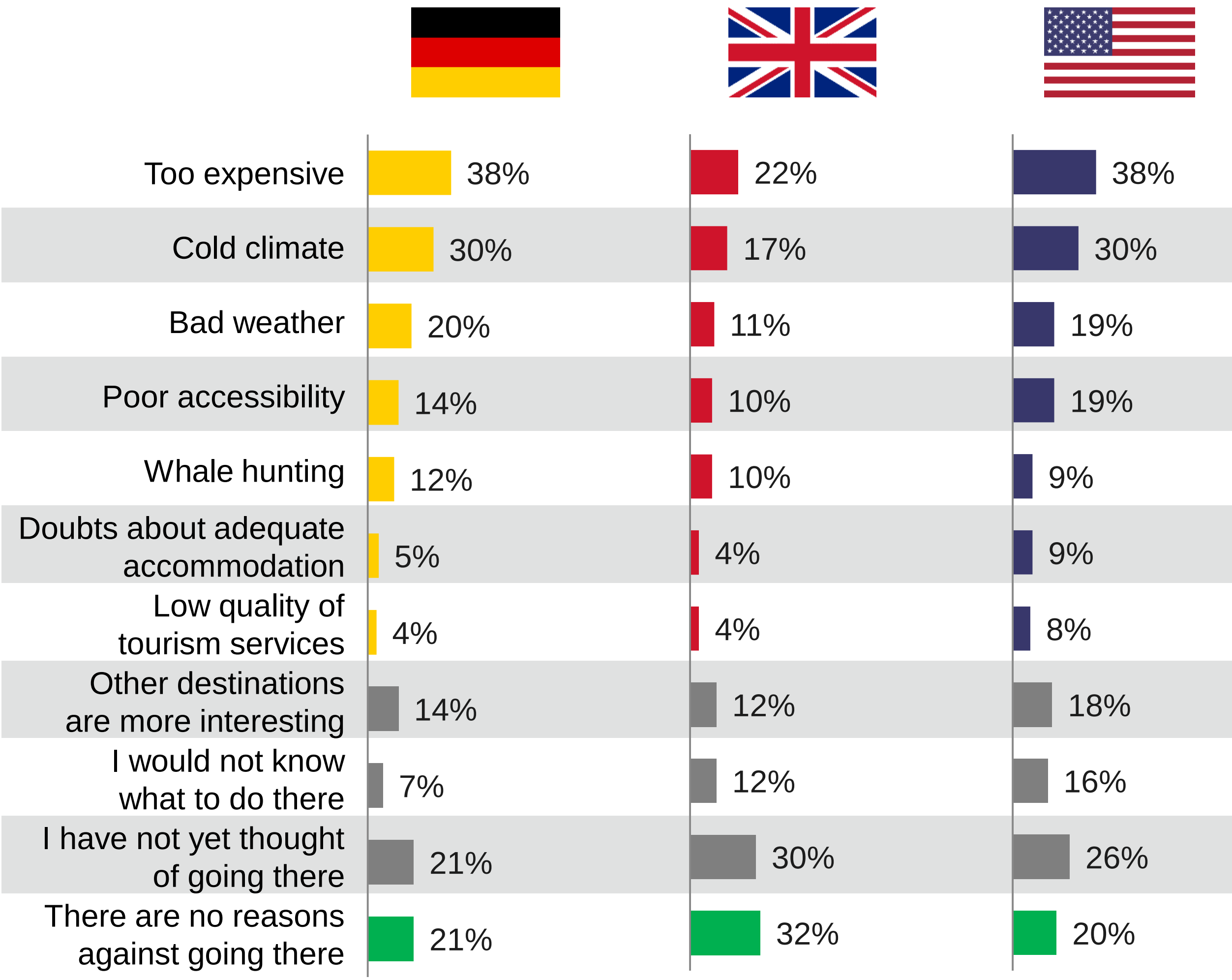
Basis: All respondents in USA interested to travel to any of the 10 Nordic destinations (n=3,329) in the segments; definitions: see page 71)
Source: VG online survey 2016 by NIT/Ipsos

6. Reasons against travelling to Greenland

Photo by Air Zafari & Mads Pihl - Visit Greenland

Total: Reasons against travelling to Greenland

[DE: Greenland/Iceland/Faroe Islands]

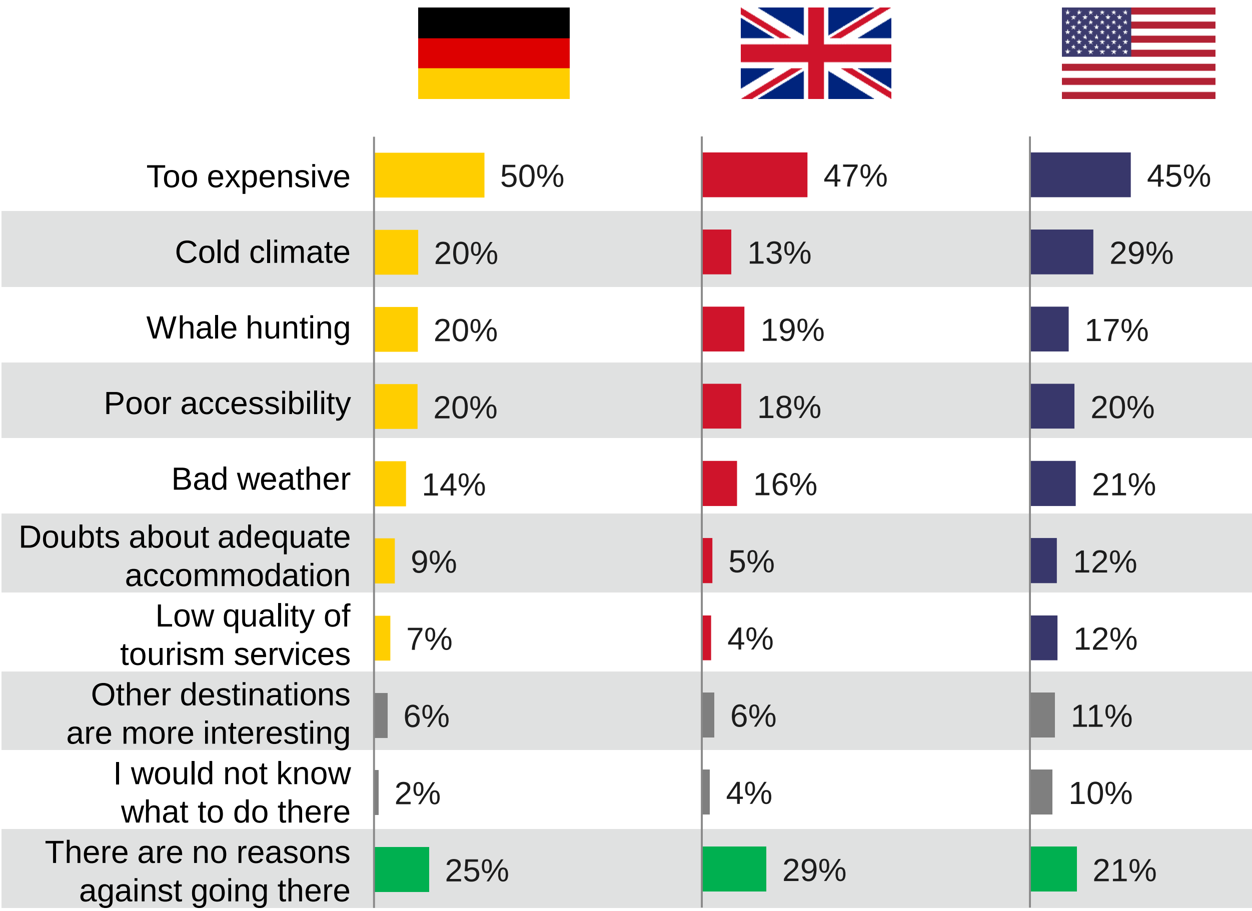


- The last question in the survey is dealing with possible reasons against travelling to Greenland (in Germany due to the NATA background of the study: Greenland/Faroe Islands/Iceland).
- The good news first: 21% of the Germans have no general objections to travel to Greenland/Faroe Islands/ Iceland. 32% of the British have no objections to travel to Greenland and 20% of the US passport holders.
- Most important reason against travelling to Greenland are the expected high costs, followed by the coldness and bad weather.
- There are also important factors in play, that are not directly linked to the tourism offer in Greenland (marked grey).

Q9: *What are in your opinion reasons against travelling to Greenland (DE: Greenland, Iceland, Faroe Islands)?*
Basis: All respondents from Germany (n=4,000), Great Britain (n=4,000) and the USA (n=4,000) ; Source: NATA/VG online survey 2016 by NIT/Ipsos

Potential guests: Reasons against travelling to Greenland

[DE: Greenland/Iceland/Faroe Islands]



- Even more important than knowing reasons against Greenland in the population is knowing the possible barriers for potential guests.
- Most of the potential guests see possible barriers, first of all the high prices, the cold climate, whale hunting and poor accessibility.
- There are only few doubts about the quality of the tourism service and infrastructure in Greenland.

Q9: *What are in your opinion reasons against travelling to Greenland (DE: Greenland, Iceland, Faroe Islands)?*
Basis: Potential travellers to Greenland from Germany (n=357), Great Britain (n=469) and the USA (n=739) ; Source: NATA/VG online survey 2016 by NIT/Ipsos

VG-Segments: Reasons against travelling to Greenland/Faroe Islands/Iceland

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	*Culture Lover*	*Culture Appreciator*	*Globetrotter*	*Sightseer*	*Wilderness Seeker*	*Nature Lover*	*Nature Appreciator*	
too expensive	41	37	*	41	**45**	36	42	**43**	37
cold climate	20	**35**	*	28	**32**	25	27	30	20
bad weather	20	**28**	*	21	19	19	20	**24**	13
poor accessibility (air, sea connections)	**23**	**20**	*	15	14	**20**	17	17	13
whale hunting	15	**18**	*	14	14	**18**	14	13	**20**
doubts about adequate accommodation for me	**9**	5	*	6	5	**9**	8	5	**13**
low quality of tourism services	**8**	3	*	4	4	**9**	7	5	7
other destinations are more interesting	11	**16**	*	10	**14**	6	7	12	13
I would not know what to do there	3	4	*	3	**5**	3	4	4	**7**
I have not yet thought of going there	11	**19**	*	15	**21**	10	15	**21**	15
there are no reasons against going there	18	17	*	**25**	**20**	14	19	18	19

Q9: *What are in your opinion reasons against travelling to Greenland, Iceland, Faroe Islands?*
Basis: All respondents in Germany interested to travel to any of the 10 Nordic destinations (n=3,123) in the segments; definitions: see page 45)
Source: NATA online survey 2016 by NIT/Ipsos

VG-Segments:
Reasons against travelling to Greenland

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	*Culture Lover*	*Culture Appreciator*	*Globetrotter*	*Sightseer*	*Wilderness Seeker*	*Nature Lover*	*Nature Appreciator*	
too expensive	**32**	27	**28**	26	23	*	25	21	24
cold climate	19	16	**23**	14	15	*	**20**	17	19
poor accessibility (air, sea connections)	**16**	14	14	**15**	14	*	12	11	9
bad weather	**19**	13	**18**	11	12	*	15	9	10
whale hunting	**18**	10	**13**	**13**	9	*	**13**	10	10
doubts about adequate accommodation for me	4	5	**9**	5	6	*	7	1	**7**
low quality of tourism services	4	4	**6**	5	4	*	**6**	2	**6**
other destinations are more interesting	11	**16**	**15**	11	12	*	11	12	14
I would not know what to do there	8	**17**	**24**	10	14	*	11	14	11
I have not yet thought of going there	17	**36**	**42**	29	35	*	26	**36**	27
there are no reasons against going there	27	24	19	**31**	**32**	*	27	27	28

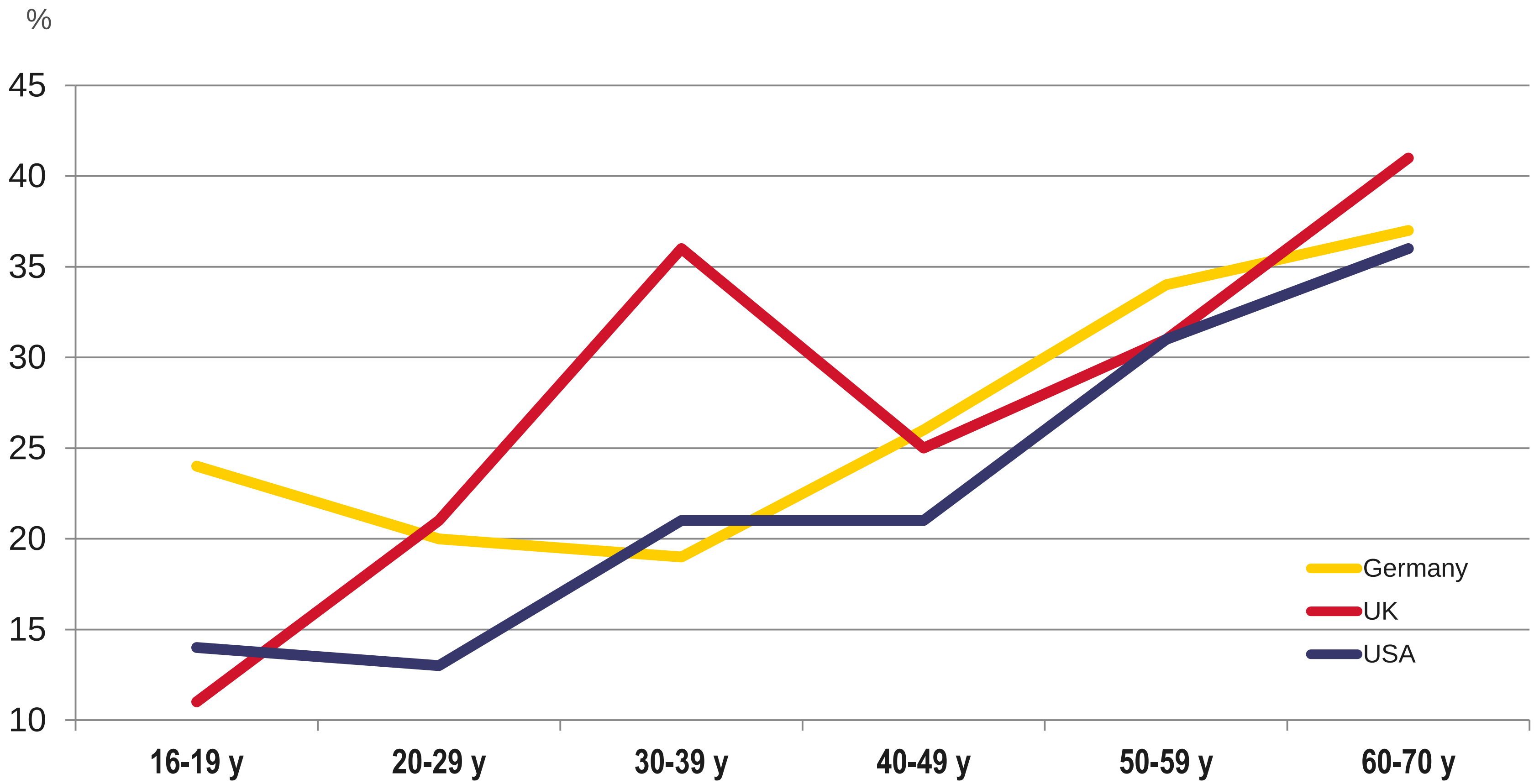
Q9: *What are in your opinion reasons against travelling to Greenland?*
Basis: All respondents in Great Britain interested to travel to any of the 10 Nordic destinations (n=2,825) in the segments; definitions: see page 58)
Source: VG online survey 2016 by NIT/Ipsos

VG-Segments:
Reasons against travelling to Greenland

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	*Culture Lover*	*Culture Appreciator*	*Globetrotter*	*Sightseer*	*Wilderness Seeker*	*Nature Lover*	*Nature Appreciator*	
too expensive	36	43	41	41	**44**	*	**47**	**47**	37
cold climate	30	**33**	27	29	28	*	28	**35**	30
poor accessibility (air, sea connections)	20	**25**	21	20	19	*	20	**22**	18
bad weather	19	19	**24**	**21**	**24**	*	16	15	19
doubts about adequate accommodation for me	**15**	8	10	9	**12**	*	8	6	8
whale hunting	**18**	8	4	**11**	4	*	9	7	9
low quality of tourism services	**15**	7	7	7	**8**	*	5	4	3
other destinations are more interesting	14	19	**24**	19	16	*	**20**	**24**	16
I would not know what to do there	12	19	**21**	16	13	*	15	**24**	15
I have not yet thought of going there	13	28	31	23	**35**	*	26	**43**	23
there are no reasons against going there	**20**	16	**21**	18	**20**	*	12	11	**21**

Q9: *What are in your opinion reasons against travelling to Greenland?*
Basis: All respondents in USA interested to travel to any of the 10 Nordic destinations (n=3,329) in the segments; definitions: see page 71)
Source: VG online survey 2016 by NIT/Ipsos

Share of people with NO objections against travelling to Greenland in different age groups



Q9: *What are in your opinion reasons against travelling to Greenland (DE: Greenland, Iceland, Faroe Islands)?*
Basis: Potential travellers to Greenland from Germany (n=357), Great Britain (n=469) and the USA (n=739) ; Source: NATA/VG online survey 2016 by NIT/Ipsos

To Learn 6:
Reasons against travelling to Greenland

» Population: 21% of the Germans have no general objections to travel to Greenland/Faroe Islands/Iceland. 32% of the British have no objections to travel to Greenland and 20% of the US passport holders.
Most important reason against travelling to Greenland are the same in all three markets: the expected high costs, followed by the coldness and bad weather.
There are also important factors in play, that are not directly linked to the tourism offer in Greenland.

» Potential guests: Within potential Greenland travellers the share of persons without obstacles is on a similar level as in the respective population.
In all three markets the product related obstacles (expensive, accessibility, tourism product) and whale hunting are (much) more relevant with the potential guests!
climate is quite a big issue in the USA, but no big thing for the British. The Germans on the other hand are not as afraid of bad weather than the other countries.

» Segments: The share of persons without obstacles differs very much between 14% and 32% in the different segments and markets. In detail, the differences between the segments are quite interesting.

» Age groups: Demographically you find the most striking differences regarding reasons against travelling to Greenland in the different age groups. This is true for all three markets. Generally, the younger age groups (16-29) have more obstacles, the older age groups (50-70) less. Very interestingly, the 30-39 year old in Great Britain have much less objectives than their age pals in Germany and USA.

» The results of Chapter 1 show a huge potential of potential Greenland travellers in the three markets.
» To transform potential guest into actual ones, it is not only important to know who they are (Chapter 3) and what they want (Chapter 2) 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, e.g. in the segments and the age groups, which might help you for a more precise targeting.

7. Competitive situation for Greenland

Photo by Mads Pihl - Visit Greenland

Competition: Where in the North do potential travellers to Greenland also want to go?

NIT
NEW INSIGHTS FOR TOURISM

Iceland	76%	80%	74%
Faroe Islands	43%	43%	19%
Svalbard Islands	46%	22%	12%
Norway	71%	69%	-
Sweden	65%	67%	-
Finland	57%	56%	-
Ireland/Scotland/Wales	67%	-	69%
Canada	63%	73%	-
Alaska	52%	60%	65%
Norway/Sweden/Finland	-	-	66%
Canada: North-East	-	-	51%
Canada: North-West	-	-	55%

» In Germany, potential travellers to Greenland are interested to travel to 5.4 other Nordic destinations within the next 5 years, most often to Iceland, Norway, Ireland/Scotland/Wales.

» In Great Britain, potential travellers to Greenland are interested to travel to 4.7 other Nordic destinations within the next 5 years, most often to Iceland, Canada, Norway

» In the USA, potential travellers to Greenland are interested to travel to 4.1 other Nordic destinations within the next 5 years, most often to Iceland, Ireland/Scotland/Wales, Norway/Sweden/Finland

Q2a: *Which of these destinations would you like to visit within the next 5 years?;*
Basis: Potential travellers to Greenland from Germany (n=357), Great Britain (n=469) and the USA (n=739); Source: NATA/VG online survey 2016 by NIT/Ipsos

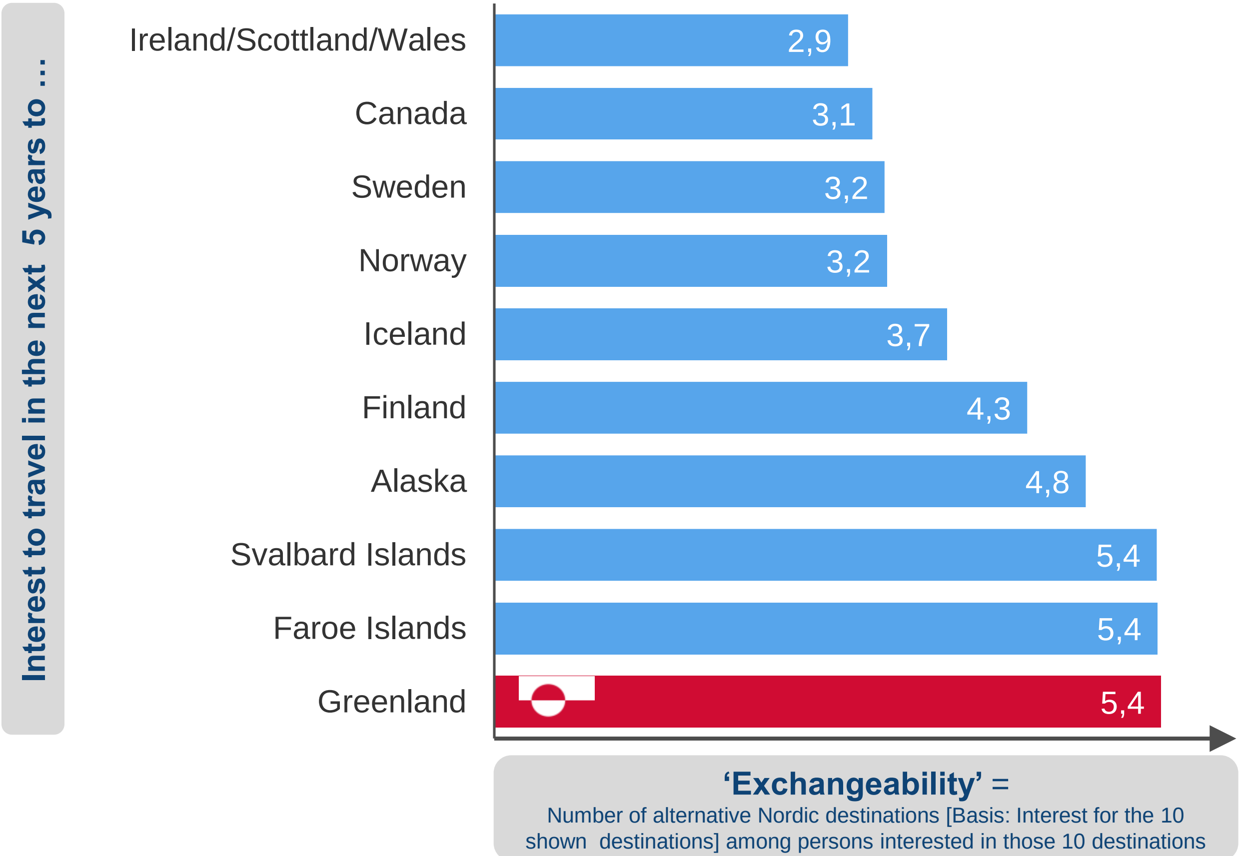
Competition: Where in the North have potential travellers to Greenland been in the past?

			
Iceland	9%	14%	13%
Greenland	4%	4%	18%
Faroe Islands	5%	3%	6%
Svalbard Islands	4%	2%	5%
Norway	29%	19%	-
Sweden	29%	20%	-
Finland	13%	11%	-
Ireland/Scotland/Wales	18%	-	23%
Canada	13%	25%	-
Alaska	1%	5%	28%
Norway/Sweden/Finland	-	-	15%
Canada: North-East	-	-	27%
Canada: North-West	-	-	29%

- In Germany, potential travellers to Greenland have been to 1.7 Nordic destinations in the past, most often to Sweden, Norway, Ireland/Scotland/Wales.
- In Great Britain, potential travellers to Greenland have been to 1.6 Nordic destinations in the past, most often to Canada, Sweden, Norway.
- In the USA, potential travellers to Greenland have been to 1.9 Nordic destinations in the past, most often to North-West Canada, Alaska and North-East Canada.

Q2b: *And which of these destinations have you already visited for a holiday in the past?;*
Basis: Potential travellers to Greenland from Germany (n=357), Great Britain (n=469) and the USA (n=739); Source: NATA/VG online survey 2016 by NIT/Ipsos

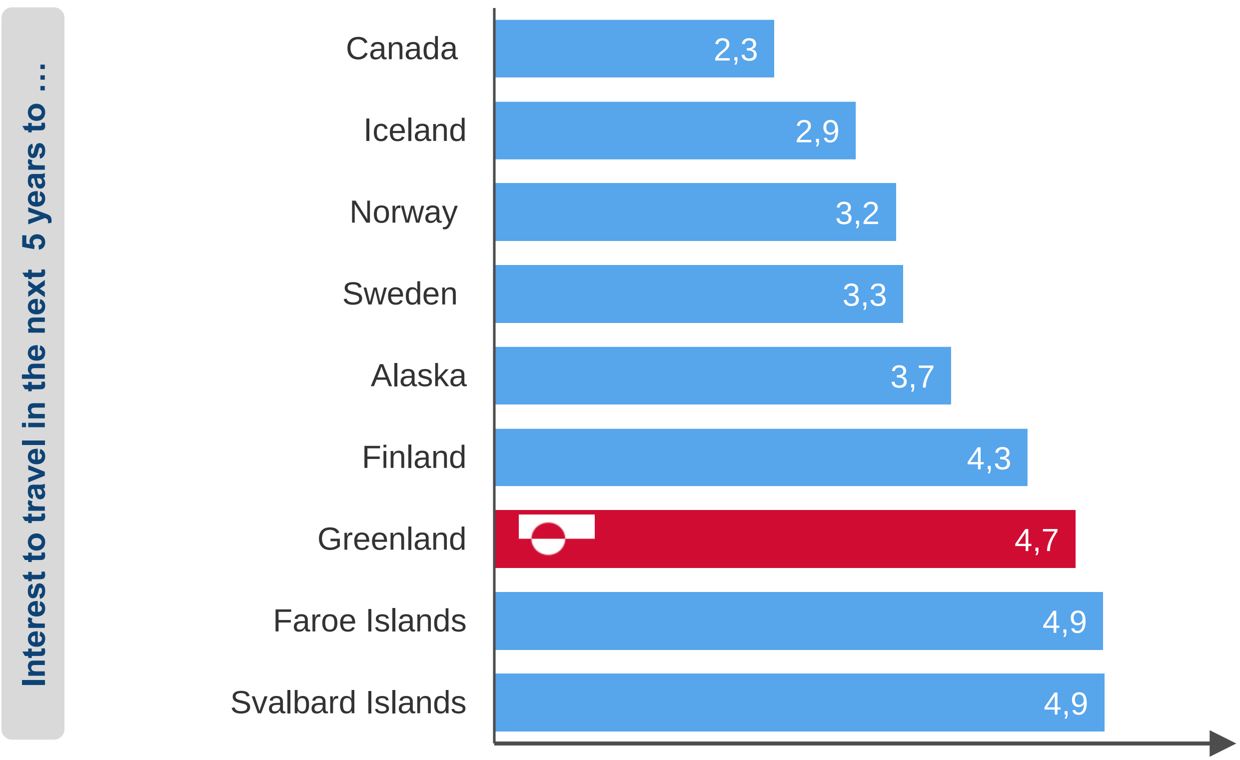
Competition: Ireland/Scotland/Wales is the least, Greenland the most 'exchangeable' destination.



- The Germans are increasingly interested in various destinations and holiday types. They are 'multi-optional' and thus open to different possibilities for realising their holiday needs.
- As a result, destinations and holiday types are becoming increasingly 'exchangeable', even if they differ from each other from an objective point of view.
- The more alternative destinations potential customers for a certain destination have in mind, the more 'exchangeable' the destination is.
- It can be seen that Ireland/Scotland/Wales, with 2.9 alternatives is the least 'exchangeable' destination. Greenland, in comparison, is the easiest to exchange.

Which of these destinations would you like to visit within the next 5 years?
Basis: All respondents in Germany (n=4,000); Source: NATA online survey 2016 by NIT/Ipsos

Competition: Canada is the least, Svalbard Islands the most 'exchangeable' destination.

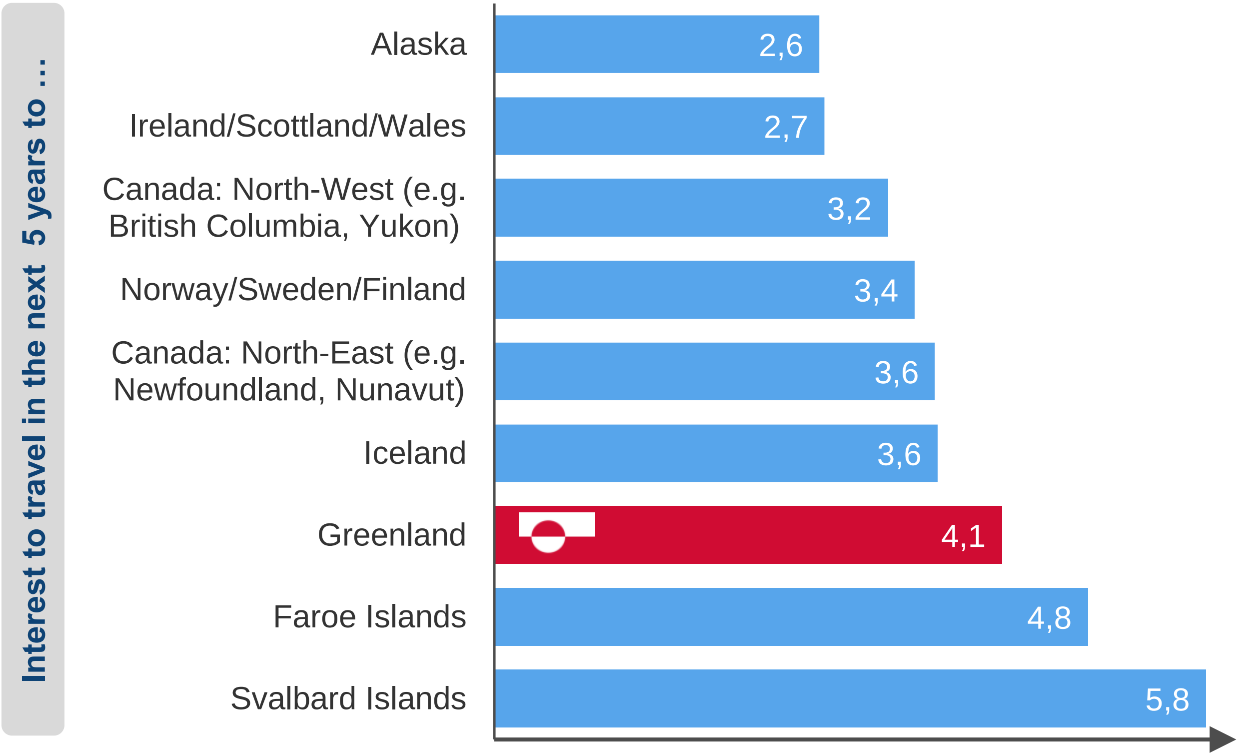


'Exchangeability' =
Number of alternative Nordic destinations [Basis: Interest for the 9 shown destinations] among persons interested those 9 destinations

- Similar to the Germans, the British are 'multi-optional' regarding their travel interests and thus open to different possibilities for realising their holiday needs.
- As a result, destinations are 'exchangeable' in their minds, even if they differ from each other from an objective point of view.
- The more alternative destinations potential customers for a certain destination have in mind, the more 'exchangeable' the destination is.
- It can be seen that in Great Britain, Canada with 2.3 alternatives is the least 'exchangeable' destination. Greenland, in comparison, is easier to exchange.

Which of these destinations would you like to visit within the next 5 years?
Basis: All respondents in Great Britain (n=4,000); Source: VG online survey 2016 by NIT/Ipsos

Competition: Alaska is the least, Svalbard Islands the most ‘exchangeable’ destination.



‘Exchangeability’ =
Number of alternative Nordic destinations [Basis: Interest for the 9 shown destinations] among persons interested those 9 destinations

- Similar to the other two markets, the US passportholders are ‘multi-optional’ regarding their travel interests and thus open to different possibilities for realising their holiday needs.
- As a result, destinations are ‘exchangeable’ in their minds, even if they differ from each other from an objective point of view.
- The more alternative destinations potential customers for a certain destination have in mind, the more ‘exchangeable’ the destination is.
- It can be seen that in the USA, Alaska with 2.6 alternatives is the least ‘exchangeable’ destination. Greenland, in comparison, is easier to exchange.

Which of these destinations would you like to visit within the next 5 years?
Basis: All respondents in USA (n=4,000); Source: VG online survey 2016 by NIT/Ipsos

Potential travellers to Nordic destinations in GER/GB/US: Preferred experiences in Greenland and its competitors

- The ranking of what potential travellers from Germany/GB/USA would like to see/experience in Nordic destinations is somewhat similar, nevertheless with a characteristic touch for each destination.
- In all three markets the wish to experience the stunning scenery, the natural phenomena (e.g. northern lights, midnight sun) and the wildlife (e.g. whales, birds, polar bears) are very important for all Nordic destinations .

- For Greenland, the biggest chances to differentiate itself from the other Nordic destinations are its glaciers/icebergs, its wildlife and unexpectedness
- For the Faroe Islands its traditional villages is the biggest chance to differentiate.
- For Iceland its volcanoes and Reykjavik as a modern capital city are the biggest chances to differentiate.

- For Greenland, the biggest chances to differentiate itself from the other Nordic destinations are its glaciers/icebergs, wildlife and unexpectedness but also traditional villages, contemporary culture and historic sights/events
- For Iceland its volcanoes and glaciers are the biggest chances to differentiate.

- For Greenland, the biggest chances to differentiate itself from the other Nordic destinations are its traditional villages, contemporary culture and historic sights/events
- For Iceland its volcanoes is the biggest chance to differentiate.
- For Alaska its wildlife and glaciers/icebergs are the biggest chances to differentiate.

Q4: *When thinking about travelling to … what would you like to see/experience?*
Basis: Potential travellers to the respective Nordic destination from Germany, Great Britain and the USA; Source: NATA/VG online survey 2016 by NIT/Ipsos

Potential travellers to Nordic destinations in GER/GB/US: Preferred activities in Greenland and its competitors

- For Greenland most important are wildlife watching and photography, both with a significantly higher interest than in the other Nordic destinations. Other activities that are standing out for Greenland are dog-sledding and glacier hiking plus “niche” activities such as kayaking, fishing and skiing.
- For the Faroe Islands most important are eating/drinking local specialties together with photography. Slightly outstanding is the learning about local handicraft
- For Iceland most important are guided nature tours and its quietness, both somewhat outstanding.

- For Greenland most important is wildlife watching, with a significantly higher interest than in the other Nordic destinations. Other activities that are standing out for Greenland are photography, dog-sledding, hiking and glacier hiking plus “niche” activities such as kayaking, skiing, fishing and cold-water diving.
- For the Faroe Islands most important are eating/drinking local specialties, wildlife watching and guided nature tours. None of the activities is standing out compared to Greenland
- For Iceland most important are eating/drinking local specialties, wildlife watching and swimming/wellness (being the only activity that is slightly outstanding compared to Greenland.

- For Greenland most important are guided nature excursions, with a slightly higher interest than in the other Nordic destinations. Other activities that are standing out for Greenland are some “niche” activities such as kayaking and skiing,.
- For Iceland most important are eating/drinking local specialties, slightly outstanding compared to Greenland. Other outstanding activities are meeting with the locals, shopping for souvenirs and swimming/wellness
- For Alaska most important and significantly outstanding is wildlife watching.

Q5: *Which of the following activities would you like to do when travelling to ... ?*
Basis: Potential travellers to the respective Nordic destination from Germany, Great Britain and the USA; Source: NATA/VG online survey 2016 by NIT/Ipsos

Potential travellers to Nordic destinations in GER/GB/US: How to travel to Greenland and its competitors

» Even though most potential travellers prefer direct flights into the region, the wishes how to travel to the three North Atlantic destinations differ characteristically.

» For Greenland a big share of the potential guest wants to include it in a multi country air trip or as a cruise destination.
» For the Faroe Islands, the cruise segment is also quite important.
» For Iceland, the direct air travel is really dominant, but keep in mind that even if lower in % the volume of the other segments is bigger than in Greenland or Faroe Islands.
» At the destination, most potential travellers to all three destiantions prefer a stay at multiple locations.

» For Greenland a big share of the potential guest wants to include it in a multi country air trip or as a cruise destination. In Greenland, most potential guests would like to stay in multiple locations.
» For the Faroe Islands, the cruise segment is as important as it is for Greenland.
» For Iceland, the direct air travel is really dominant, but keep in mind that even if lower in % the volume of the other segments is bigger than in Greenland or Faroe Islands.
» For Faroe Islands and Iceland a high share of the potential guests prefer staying at one location

» For Greenland and Iceland a big share of the potential guest wants to include it in a multi country air trip or as a cruise destination.
» For Alaska the cruise segment is as big as the direct flights segments. Other means of getting to Alaska are only niches.
» At the destination, most potential travellers to all three destiantions prefer a stay at multiple locations.

Q6: *How would you like to travel to … ?*
Basis: Potential travellers to the respective Nordic destination from Germany, Great Britain and the USA; Source: NATA/VG online survey 2016 by NIT/Ipsos

Potential travellers to Nordic destinations in GER/GB/US: Preferred info sources for Greenland and its competitors

- The first three preferred information sources are the same in the three destinations: Internet search in front of guide books and travel magazines.
- For Greenland books/literature are somewhat outstanding, for Faroe Islands online booking agents and social media, for Iceland travel agencies and personal relations (friends, family etc.).
- Destination websites are ranked 5 in Faroe Islands and Iceland and 6 in Greenland, all with around 1/3 of the respective potential guests naming it as a preferred information source.

- The first three preferred information sources are similar in the three destinations: Internet search in front of destination websites and guide books.
- For Greenland guide books, travel magazines and books/literature are somewhat outstanding, for Iceland personal relations (friends, family etc.) and holiday review sites.
- Destination websites are ranked 2 in all three destinations.

- The first preferred information sources in the ranking are similar in the three destinations: Internet search in front of destination websites/guide books/travel magazines.
- For Greenland travel magazines, books/literature and newspaper are somewhat outstanding, for Iceland internet search engines, destination websites and holiday review websites and for Alaska personal relations (friends, family etc.)
- Destination websites are ranked 2 in Greenland and Iceland and 3 in Alaska.

Q7: *When thinking about travelling to ... how would you like to look for inspiration/information for this trip?*
Basis: Potential travellers to the respective Nordic destination from Germany, Great Britain and the USA; Source: NATA/VG online survey 2016 by NIT/Ipsos

Potential travellers to Nordic destinations in GER/GB/US: Preferred online content, Greenland and its competitors

- When asked for their preferred kind of online content, most potential guests of all three destinations favour destination images in front of product images and factual texts on the travel product.
- These seem to be basic prerequisites that every travel website should offer.

Germany

- A higher share in Greenland than in the other destinations then fancies videos of the destination.
- The share of persons who like destination newsletters is highest in Greenland
- The share of persons who like social media stories is highest in Faroe Islands, followed by Greenland and Iceland.

Great Britain

- A higher share in Greenland than in the other destinations then fancies videos of the destination.
- The same goes for videos and texts about lifestyle and culture from the locals' perspective.
- The share of persons who like destination newsletters is higher in Faroe Islands and Greenland than in Iceland
- The share of persons who like social media stories is highest in Greenland

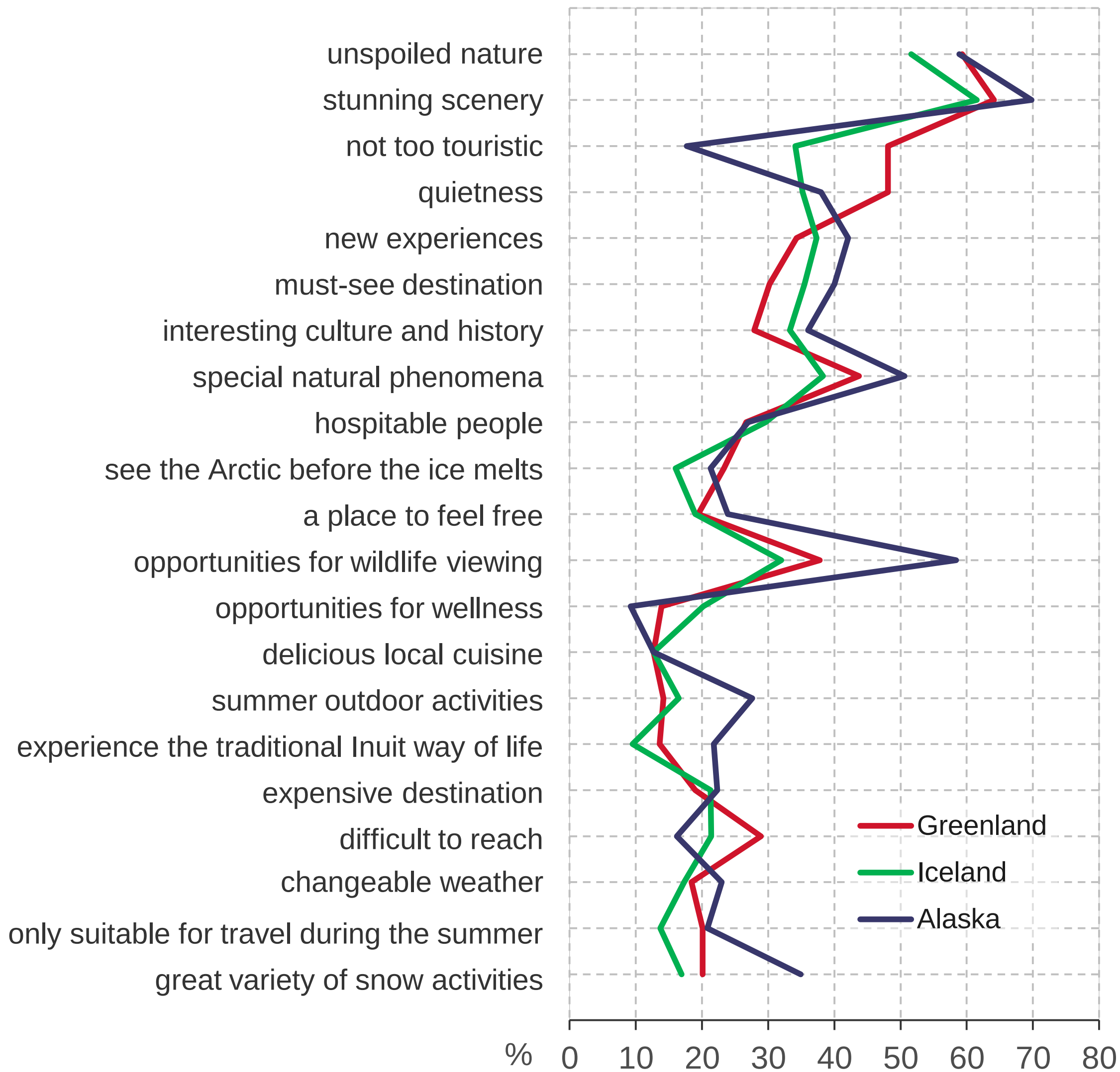
USA

- A higher share in Greenland than in the other destinations then fancies videos of the destination.
- The same goes for videos and texts about lifestyle and culture from the locals' perspective.
- The share of persons who like destination newsletters and social media stories is higher in Greenland and Iceland than in Alaska

Q8: *Which kind of content do you like to find when looking for online information about ...?*
Basis: Potential travellers to the respective Nordic destination from Germany, Great Britain and the USA; Source: NATA/VG online survey 2016 by NIT/Ipsos

Image comparison: Greenland, Iceland, Alaska

[image questions were only asked in the US survey]



- Similar images of the three destinations: Key image factors of all three destinations are nature and scenery.
- Greenland and Iceland with an average of ca. 6 characteristics per person. Alaska with an average of almost 7.
- Greenland is seen as most characteristic regarding "not too touristic" and "place of quietness" – and on the negative side, as "difficult to reach".
- Alaska is the best-known of the three destinations, with comparatively high figures regarding "wildlife viewing", summer and winter activities.
- Iceland scores a little higher figures than Greenland regarding culture/history and "must-see".

Q3a: *Please tell me which of these characteristics do you think particularly apply to Greenland?*
Q3b: *And which of these is in your opinion the most distinguishing characteristic of Greenland?*
Basis: All respondents in USA, aware of Greenland as a travel destination (n=3,398), of Iceland (3,536) and of Alaska (3,681)
Source: VG online survey 2016 by NIT/Ipsos

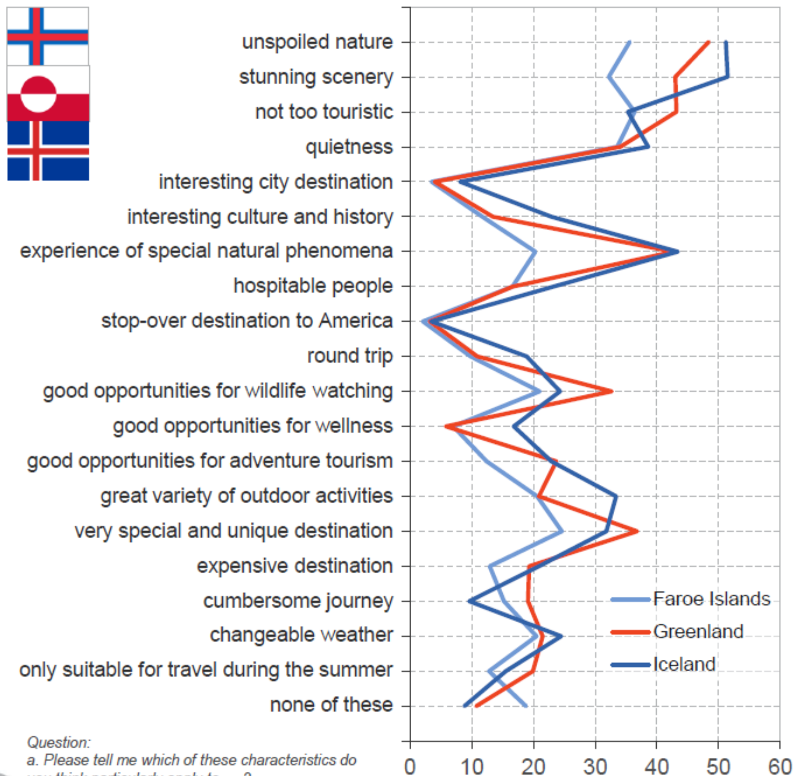
Image comparison: Greenland, Iceland, Alaska

[image questions were only asked in the US survey]

NEW INSIGHTS FOR TOURISM

4. Image as holiday destinations

Image comparison: Similar images with emphasis on nature and scenery but with possibilities to differentiate



Question:
a. Please tell me which of these characteristics do you think particularly apply to … ?
b. And which of these is in your opinion the most distinguishing characteristic of … ?

Source: RA *online* 5/2012
Basis: German-speaking population 14-70 years, aware of the three holiday destinations

» Similar images of the three destinations.
» Greenland and Iceland with an average of around 5 characteristics per person. Faroe Islands with an average of less than 4.
» Key image factors of all three destinations are nature and scenery.
» Greenland is seen as most unique and with good wildlife watching.
» Iceland gets the highest nominations for outdoor activities and a variety of secondary characteristics, e.g. wellness, city destination, round trip.
» The Faroe Islands' figures are always below at least one of the other destinations; within its image, "quietness" and "not touristic" are striking.

NATA North Atlantic Tourism Association

RA ReiseAnalyse 2012

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To Learn 7: Competitive situation for Greenland

» Competition: In all three markets, Greenland is one of the more exotic Nordic destinations. This means it attracts quite a lot of attention, but often the people are also interested in other "bigger" destinations:
   » In Germany, potential travellers to Greenland are interested to travel to 5.4 other Nordic destinations within the next 5 years, most often to Iceland, Norway, Ireland/Scotland/ Wales.
   » In Great Britain, potential travellers to Greenland are interested to travel to 4.7 other Nordic destinations within the next 5 years, most often to Iceland, Canada, Norway
   » In the USA, potential travellers to Greenland are interested to travel to 4.1 other Nordic destinations within the next 5 years, most often to Iceland, Ireland/Scotland/Wales, Norway/Sweden/Finland

» Product requirements: In each of the markets there are characteristic differences between the product requirements of potential travellers to Greenland and its Nordic competitors. It is worth taking a closer look at these differences when thinking about market specific strategies.

» Image comparison USA: The images of Greenland, Iceland and Alaska are quite similar. Key image factors of all three destinations are nature and scenery. Nevertheless, Greenland is seen as most characteristic regarding "not too touristic" and "place of quietness" – and on the negative side, as "difficult to reach". Alaska is the best-known of the three destinations, with comparatively high figures regarding "wildlife viewing", summer and winter activities. Iceland scores a little higher figures than Greenland regarding culture/history and "must-see".

» Image comparison Germany: The images of Greenland, Faroe Islands and Iceland are quite similar. Key image factors of all three destinations are nature and scenery. Nevertheless, Greenland is seen as most unique and with good wildlife watching. Iceland gets the highest nominations for outdoor activities and a variety of secondary characteristics, e.g. wellness, city destination, round trip.

» The results show that Greenland is in a fierce competition with other destinations in the North and around the world.

» The findings about characteristic product requirements and destination images again help to better understand the potential travellers to Greenland and to make the right decisions for market specific marketing approaches.

8. Main conclusions and discussion points

Photo by Mads Pihl - Visit Greenland

Main conclusions and discussion points

- **Huge potential in all three countries**: Compared to the actual visitor numbers, Greenland has a huge volume of potential guest in all three markets. This is the room for destination marketing.
- **Expectations brilliantly confirm the BIG ARCTIC FIVE**: The analysis of the expected experiences and activities of potential guests in all three countries confirm the huge importance of Ice and Snow, Northern Lights, Whales, Dog Sledding and Pioneering People.
- **Opportunities and challenges in product development**: One big challenge will be to meet up to the high expectations regarding wildlife watching. There are no barriers for photo-tourism; this means plenty of opportunities for product development. Products with hiking, both soft hiking and multi-day trekking can be advantageously developed.
- **Good potential of combined Iceland-Greenland trips**: Quite a lot of potential Greenland guests would prefer multi-country trips by plane or cruise ship or even consider excursions from one country to the other.
- **Guide books and travel magazines are important in all three markets**: Perhaps it would be a good opportunity to offer a free or inexpensive guide book. Look for cooperation possibilities with travel magazines (maybe not so much in advertising but more in PR/stories)
- **Of course there are also some barriers and general challenges on the three markets**: The fierce competition with other 'Nordic destination' together with the perceived high price barrier is definitely the biggest challenge. It stresses once more the importance of a clear branding, positioning, pricing, targeting & communication of Greenland as a destination. Secondarily, communication about whaling and the perceived poor accessibility are also essential tasks. On the positive side, very few have the perception of poor service and quality of accommodation.

All in all, the results of this study give a lot of relevant information for a more precise marketing in the future: Stated preferences and segments in the 3 countries clearly show similarities and differences of segments and markets that have to be taken into account when deciding on strategies and actions.

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ANNEX A:
Outbound travel trends on the GERMAN market

*[Source: Relevant results of "German Holiday Travel 2025"
and the respective chapter of the 2016 NATA report by NIT]*

Holiday trips and short breaks 2015 of German travellers: Demand figures overview

Holiday trips (5 days and more)

Year	Travellers	Holiday trips per person	Holiday trips	Expenditure p. p. and trip	Turnover
2015	53.4 million	1.29	69.1 million	€ 954	€ 65.9 billion

Short breaks (2-4 days)

Year	Short break travellers	Short breaks per person	Short break trips	Expenditure p. p. and trip	Turnover
2015	31.7 million	2.43	77.1 million	€ 274	€ 21.1 billion

Basis: Holiday trips (5+ days): German-speaking population 14+ years, January to December; Source: RA 2016 *face-to-face;*
Basis*:* Short holiday trips (2-4 days): German-speaking population 14-70 years, November to October; Source: RA *online* 11/2015

Trend 2025: Volume key figures; Stability; Certain growth potential for short breaks

Holiday trips 2025: -1 million*

- Stable/ slightly declining
- No growth of holiday travel propensity
- Holiday travel frequency declining

Short breaks 2025: +5 million*

- Certain potential for growth
- More trips per traveller
- More trips of 70+ year old travellers

* Basis: Compared to number of trips 2013 of the German-speaking population 14+ years

Source: Martin Lohmann, Dirk Schmücker, Ulf Sonntag: *German Holiday Travel 2025: Development of holiday travel demand in the German source market. (German Holiday Travel 2025)*.

Trend 2025: Age structure of travellers; Significantly more older travellers in the future

Volume of holiday trips 2013 → 2025

70+ years → **+2,2** million trips

60-69 years → **+4,1** million trips

14-59 years → **-7,4** million trips

The market share of trips by 60+ year olds increases from 30% in 2014 to almost **40% in 2025**

Source: Martin Lohmann, Dirk Schmücker, Ulf Sonntag: *German Holiday Travel 2025: Development of holiday travel demand in the German source market. (German Holiday Travel 2025).*

Trends 2025 regarding volume of holiday travel and age structure of holiday travellers

» We are currently measuring a holiday travel intensity of more than 77% among the German-speaking population aged 14 years and older. This equals a volume of more than 53 million holiday travellers. We anticipate that the relative and absolute figures will remain stable through 2025. With the demographic change, however, there will be a drastic modification of the structure, a shift from the younger and middle towards the older age groups.

» As for holiday travel frequency – i.e. the answer to the question of how many holiday trips a holiday traveller will take per year – we expect 1.25 holiday trips per traveller for the year 2025, which is somewhat less than for 2015. This development is a result of a continued slight decline in travel frequency among the age groups 14 to 59 years, but it will be attenuated by the stability or even slight growth of the figures among the 60- to 69-year-olds and the above 70-year-olds.

» Based on these predictions, we expect a total volume of nearly 70 million holiday trips for the year 2025. This figure has a fluctuation range that makes both a decline (to 67 million) and an increase (to 72 million) appear possible.

» As for the short holiday trips, there is a more positive outlook for a certain growth in the years 2015- 2025. But the range of uncertainty is considerably greater in this estimate than it is for the holiday trips.

» Expenditures per person and holiday trip will probably remain about the same in 2015 prices for the period until 2025. At least, the trends among travel destinations and travel behaviour do not suggest any substantial increases or declines. There might be some nominal increases due to inflation.

» For Greenland/Faroe Islands/Iceland this means that they cannot profit from a growing German market.

» On the other hand the NATA destinations can rely on the overall stability of the German holiday travel demand.

» A certain opportunity can be seen in the good prospects for short breaks. But one has to bear in mind that the vast majority of short trips stay within Germany and a good proportion of the international short breaks are leading into the European metropolises.

» Greenland/Faroe Islands/Iceland have to keep an eye on the modification of the age structure of the German market.

Trend 2025: Share of domestic/ outgoing holiday trips – Slightly negative trend for destinations abroad

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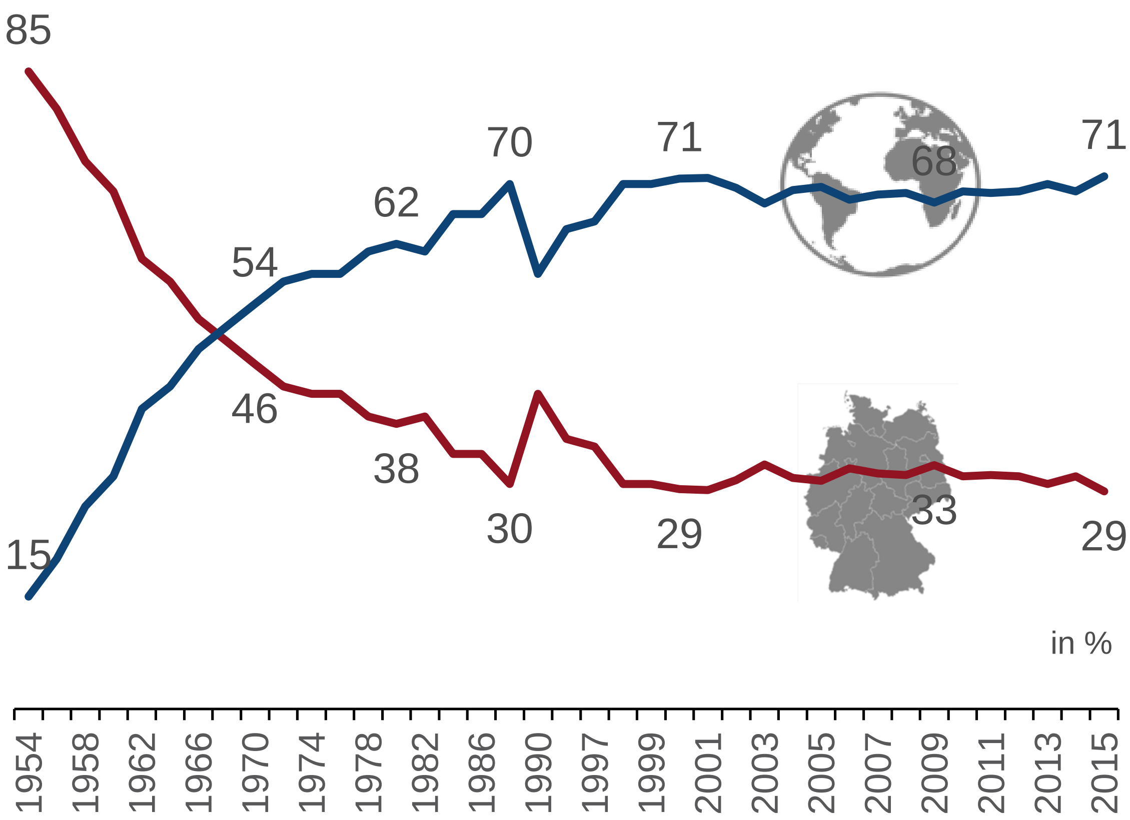


Abroad 2025:

67% market share
46.6 million trips
(-2.6 million vs. 2013)

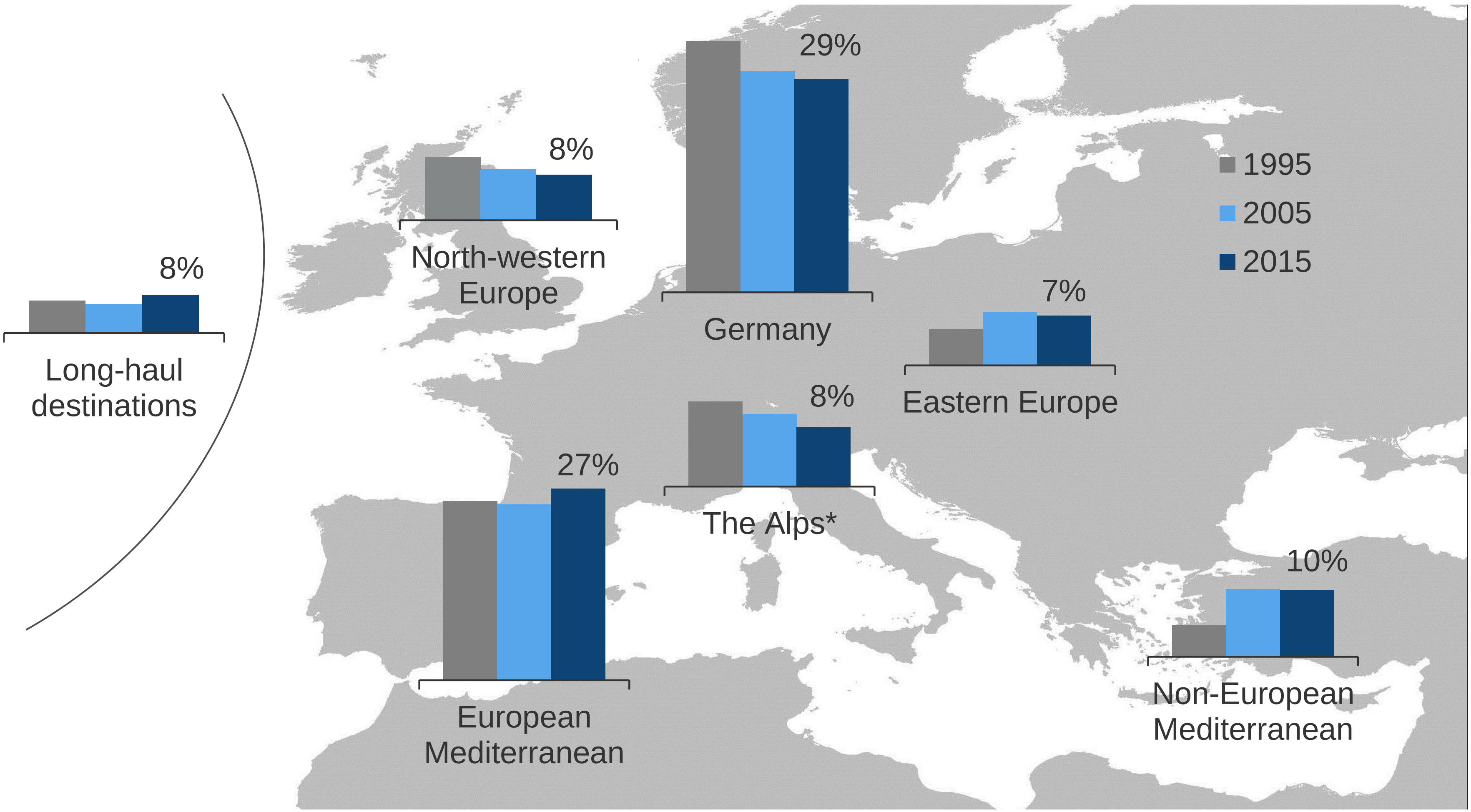
Domestic 2025:

33% market share
23.0 million trips
(+1.5 million vs. 2013)

Basis: **Holiday trips (5+ days)** of German/German-speaking population 14+ years;
Source: Martin Lohmann, Dirk Schmücker, Ulf Sonntag: *German Holiday Travel 2025: Development of holiday travel demand in the German source market. (German Holiday Travel 2025)*.

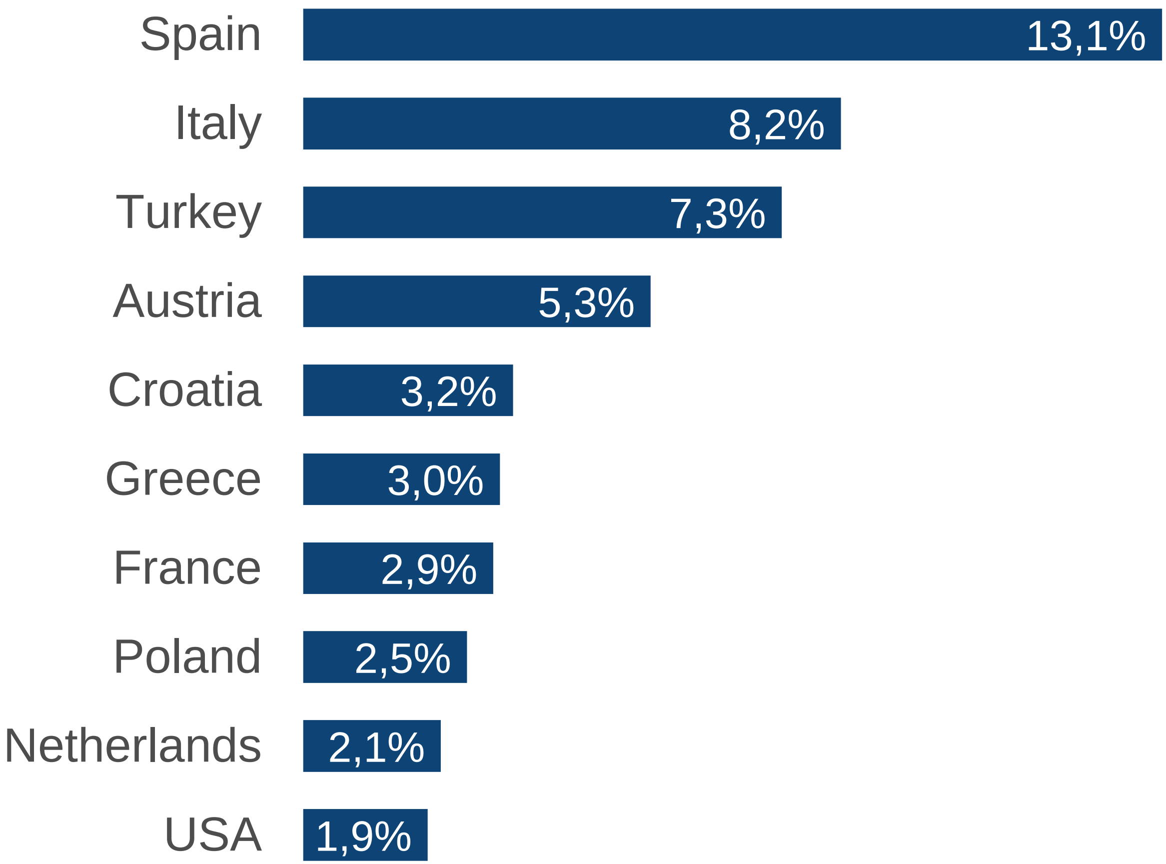
NATA

Holiday destinations (regions) 1995-2015: Stability for most regions



* Alps = Alpine regions in Austria, France, Germany, Italy and Switzerland
Basis: **Holiday trips (5+ days)** of German-speaking population 14+ years; 1995, 2005 only Germans.
Source: RA 1996, RA 2006, RA 2015 *face-to-face*

Holiday destinations 2015 – TOP 10 in detail

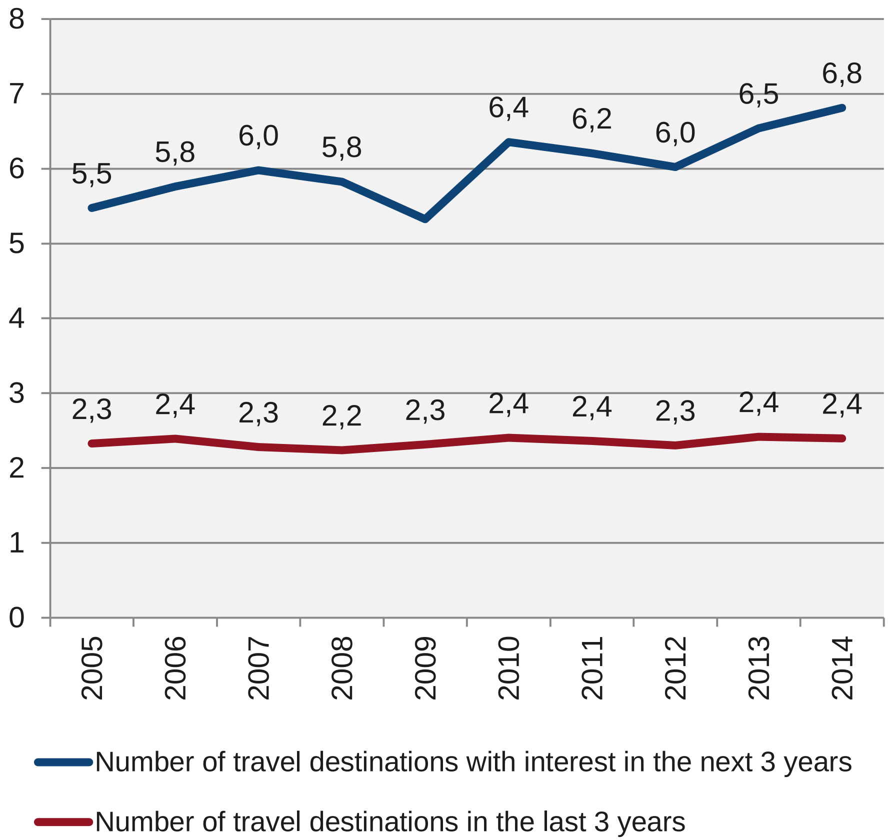


Basis: **Holiday trips (5+ days)** of German-speaking population 14+ years
Source: RA 2016 *face-to-face*

Experience with and interest in travel destinations 2005 - 2014

NEW INSIGHTS FOR TOURISM

Average number of holiday destinations in the last/next 3 years



- On average, Germans list almost seven different travel destinations they would like to visit on holiday in the near future. This degree of flexibility on the customers' part ensures that crises in the various holiday countries do not result in a decline in overall tourism demand: if a crisis occurs, people simply go elsewhere. The reverse also applies: when a destination is no longer making negative headlines, demand is relatively quickly back at its "regular" level. This happened, e.g., with Greece, which has been able to increase both its market share again in 2013 and the number of responses expressing an interest in going there.
- **Multi-optionality** in terms of overall interest in different travel destinations has increased considerably since 2005 – at the time, interest was expressed in 5.5 different travel destinations on average, and in 2014 the figure was 6.8 (see on the chart).
- The figures for actual demand are considerably smaller at a constant level: on their holiday trips and short holiday trips in the three years prior to 2005 and 2014, Germans visited 2.4 different travel destinations respectively.

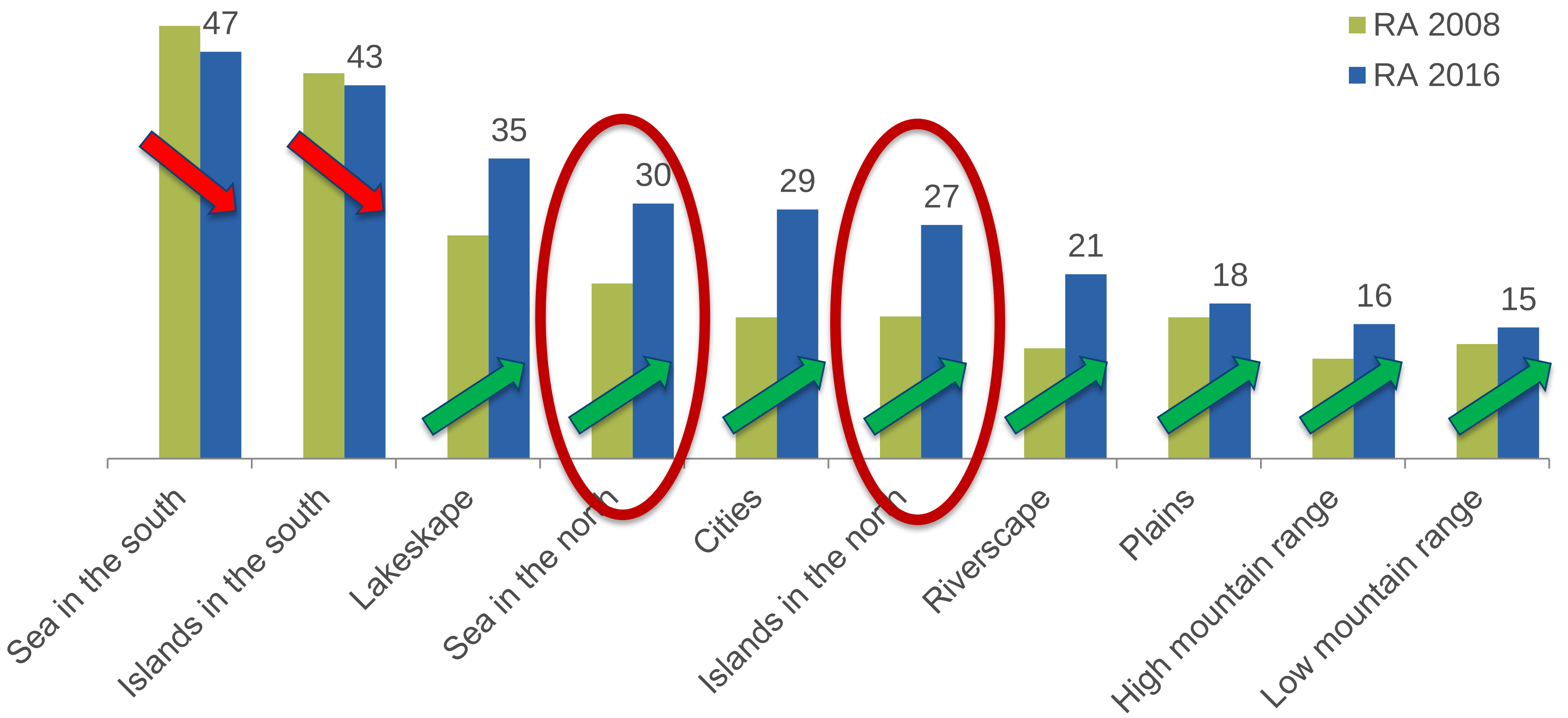
Number of travel destinations indicated (from a list of 59 travel destinations).
German resident population aged 14 years and older in Germany (without foreigners), RA 2005–2014 *face-to-face*.

Trends 2025 regarding holiday destinations

- For decades, foreign destination areas were able to gain market shares at the expense of domestic holiday trips. Since the mid-1990s, the ratio between all domestic and foreign holiday trips was relatively stable at 30:70. Currently there are strong indications that Germany is becoming a more sought-after travel destination within the next few years. A market share growth by approx. 10% during the period until 2025 seems realistic. With the number of holiday trips declining by a total of 1.1 million, this translates into growth for Germany of 1.5 million holiday trips and a simultaneous decline by 2.6 million holiday trips for foreign countries compared to 2013.
- If we look at travel destinations in terms of major regions, not only Germany, but also the distant destinations have fairly good chances for growth, as do travel destinations in North-western Europe – albeit at a considerably lower rate than Germany. The Mediterranean as a whole tends to remain stable as a significant destination, and it also looks as if the relationship between European and non-European regions were stabilizing. Eastern Europe and the Alps have to battle a slightly negative trend. As a general rule, however, the differences in dynamics between individual countries and regions within the greater regions can often be drastic.
- Looking at the international destinations on the country level, the big ones abroad will stay big, too: Spain is going to remain the uncontested "top dog" with similar market shares as today, and Italy and Turkey will compete for the runner-up position, with Turkey currently having a slight lead. Austria is in fourth place. Its current figures show that it has increased its market shares during previous years, and so it is probably going to be able to secure its position in the future, too. Next, Croatia and Greece are competing against France about fifth to seventh place.

- For Greenland/Faroe Islands/Iceland this means that competition on the German market will remain high.
- Even though the general outlook for the volume of international holiday trips is slightly negative, the prospects for North-Western Europe (UK, Ireland, Benelux, Scandinavia and NATA region) are rather positive.
- Nevertheless, it will stay a hard job to convince Germans coming for their holiday trips and short breaks to Greenland/Faroe Islands/Iceland rather than going someplace else.

Development of the landscape preferences 2008 – 2015



Question: "Please tell me for each of these areas/landscapes (disregarding countries) whether you like them as holiday destinations very much, pretty much . . . or not at all"; "like very much" in %.
German resident population aged 14-70 years,
RA 2008 *face-to-face*, RA *online* 11/2015

Holiday motivations in January 2016

Get away from daily routine	64%
Relaxation	62%
Recuperate	60%
Rest, do nothing, be lazy	49%
Freedom, free time	48%

Relax, recuperate, be free

Enjoy nature	53%
Healthy climate	42%
Do something for my health	29%
Gentle sports and fitness	27%
Escape from pollution	16%

Nature and health

New experiences	38%
Travel around, be on the move	37%
Get completely new impressions	37%
Get to know other countries	32%
Do something cultural	25%

New experiences

Sun, warmth	65%
Fun, amusement, enjoy myself	57%
Spoil myself	50%
Share experiences	36%
Do something for my appearance	30%
Meet new people	29%
Be entertained	25%
Flirt/Erotic	11%

Sun, fun, people

Spend time with friends/family	52%
Play with the children	19%

Partner, family

Revisit an area	32%
Meet the locals	28%

Interaction

discovery, risk	11%
Active sports	8%

Risk, action

Holiday motivations – “particularly important”
German-speaking population aged 14 or over, RA 2016 *face-to-face*

Holiday motivations of the Germans, 1975–2014

	Jan. 1975	Jan. 1985	Jan. 1994	Jan. 2004	Jan. 2014
	TOP 5: The most important motives are . . .				
Mentioned most frequently	Unwinding, relaxing* (64%)	Unwinding, relaxing* (65%)	Unwinding, relaxing* (71%)	Relaxation*, etc. (65%)	Sun, warm weather, ... (68%)
	Get away from daily routine (62%)	Get away from daily routine (58%)	Get away from daily routine (66%)	Get away from daily routine (59%)	Get away from daily routine (68%)
	Finding new strength (54%)	Finding new strength (47%)	Experiencing nature (52%)	Being free, having time (58%)	Relaxation*, etc. (68%)
	Being with nice people (53%)	Resting , not doing anything (43%)	Recuperate (52%)	Recuperate (57%)	Recuperate (62%)
	Being outdoors (50%)	Experiencing nature (38%)	Totally new impressions (51%)	Time for one another (49%)	Having fun (61%)
	"Particularly important" only for few people:				
Mentioned least frequently	Discovering things (17%)	Refreshing memories (12%)	Discovery, risk, etc. (16%)	Light sports activities, etc. (9%)	Flirt / erotic adventure (14%)
	Improving my education (16%)	Discovery tour (10%)	Doing s.th. for my beauty (12%)	Discovery, risk, etc. (7%)	Discovery, risk, etc. (12%)
	Actively engaging in sports (15%)	Hobbies, etc. (7%)	Actively engaging in sports (12%)	Actively engaging in sports (7%)	Actively engaging in sports (11%)

* careful adaptation of wording over the years, e.g. "unwinding, relaxing = abschalten, ausspannen", "relaxation, etc. = Entspannung, etc."
RA 2014 list with 29 categories, other years different lists and questions, multiple answers permitted; some statements are shortened; rankings according to % values for "particularly important", holiday travellers among the German residential population aged 14 or older (without foreigners, 1975 and 1985: only West Germans), RA 1972, 1984, U+R 1994, RA 2004, 2014 *face-to-face*

Trends 2025 regarding holiday motivations and attitudes

- Generally speaking, the motives and attitudes elicited in the RA indicate a stable tourism demand in terms of quantity as well as quality. These customers can be relied upon. Holiday travel is at the top of their consumption priorities.
- Over the past four decades, the development of the holiday motives and expectations shows that customers have become more demanding. The basic motives for holiday travel are not going to change in the next ten years, either: people want relaxation, no stress, to be able to do what they like, and get away from their everyday life while at the same time finding fresh strength to master it. According to this data, there can be no question of a fundamental change of holiday values.
- It is likely that further differentiation will take place regarding the expectations of how these basic motives are to be realized on the specific holiday trip. Here, too, the great travel experience results in knowledgeable customers, which in turn leads to growing and more detailed expectations concerning their holiday.
- A characteristic of the future demand is that customers will not only continue to be demanding but will also be very flexible in the way they act, based on a wide range of holiday interests and motives (multi-optionality).
- The recent comparison between 2016 and 2008 reveals that the perceived attractiveness of almost all forms of landscape has increased. Only the top types of holiday landscapes, sea and islands in the south find slightly declining acceptance from Germans as a holiday destination.

- The analysis of the general holiday motivation helps Greenland/Faroe Islands/Iceland to understand the German traveller. The holiday motivation and landscape preferences show at the same time challenges and opportunities:
  - Opportunities regarding important motivations where the NATA destinations have the right product to meet these motivations.
  - Challenges regarding important motivation where the NATA destination might not have the right product to meet these motivations.

Types of holiday: Demand dynamics 2002-2015
Sun&beach plus types that offer **variety without strain**

NIT NEW INSIGHTS FOR TOURISM

	2002-2015	Value 2015	Trend
Beach/sun-bathing holiday		**46%**	↗
Resting holiday		**37%**	↘
Nature holiday		**28%**	↗
Family holiday		**26%**	↗
Adventure/Experience* holiday		**24%**	↘
Active holiday		**18%**	→
Sightseeing holiday		**17%**	↗
Visiting relatives/friends		**13%**	↘
Fun/Party holiday		**13%**	→
Circular tour		**10%**	↗
Cultural trip		**8%**	→
Health holiday		**5%**	↘
Study trip		**4%**	→

* In German: „Erlebnisurlaub“

Holiday trips (5+ days), type of holiday travel (multiple answers) in %,
sparklines without uniform scale, trend: linear regression 2002-2014, German population 14+ years (without German-speaking foreigners),
Source: RA 2003-2015 *face-to-face*

NATA

Types of holiday: Interest dynamics 2005-2014

Change rate total interest
2005 vs. 2015

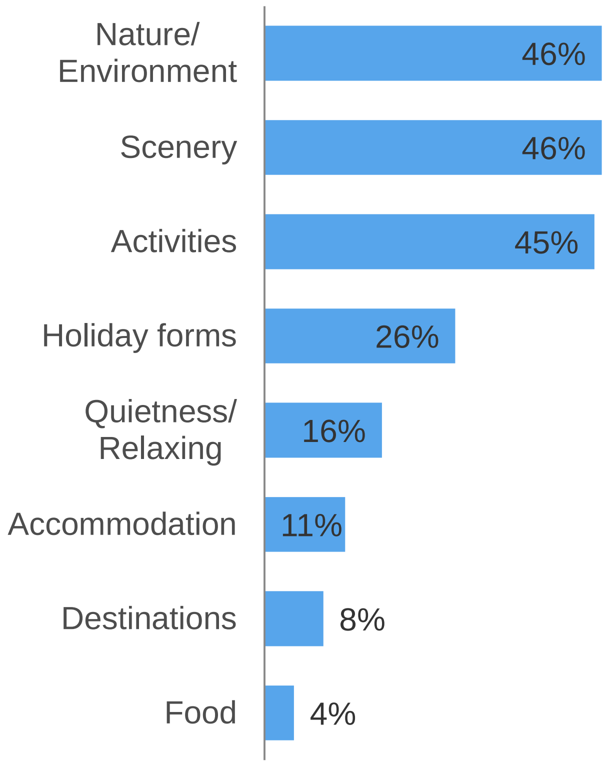
City break	+ 49%
Ocean cruise	+ 27%
Fun+party holiday	+ 26%
Family vacation	+ 26%
Winter in the sun	+ 24%

Fitness holiday	- 34%
Health holiday	- 30%
Medical spa holiday	- 27%
Winter in the snow	- 8%
Holiday to relax	- 6%

Expressed total interest for types of holidays in the next 3 years
German-speaking population of 14+ years
RA 2005 and RA 2015 *face-to-face*

Definition/Understandings of “nature holiday“ in the German population: distinct environments, sceneries and activities

Open statements in categories



Top statements

- (lots of) nature (14%)
- (lots of) animals (7%)
- fresh/good air (6%)

- mountains(16%)
- forests (16%)
- Lakes (8%)

- hiking/trekking (20%)
- camping (15%)
- cycling (7%)

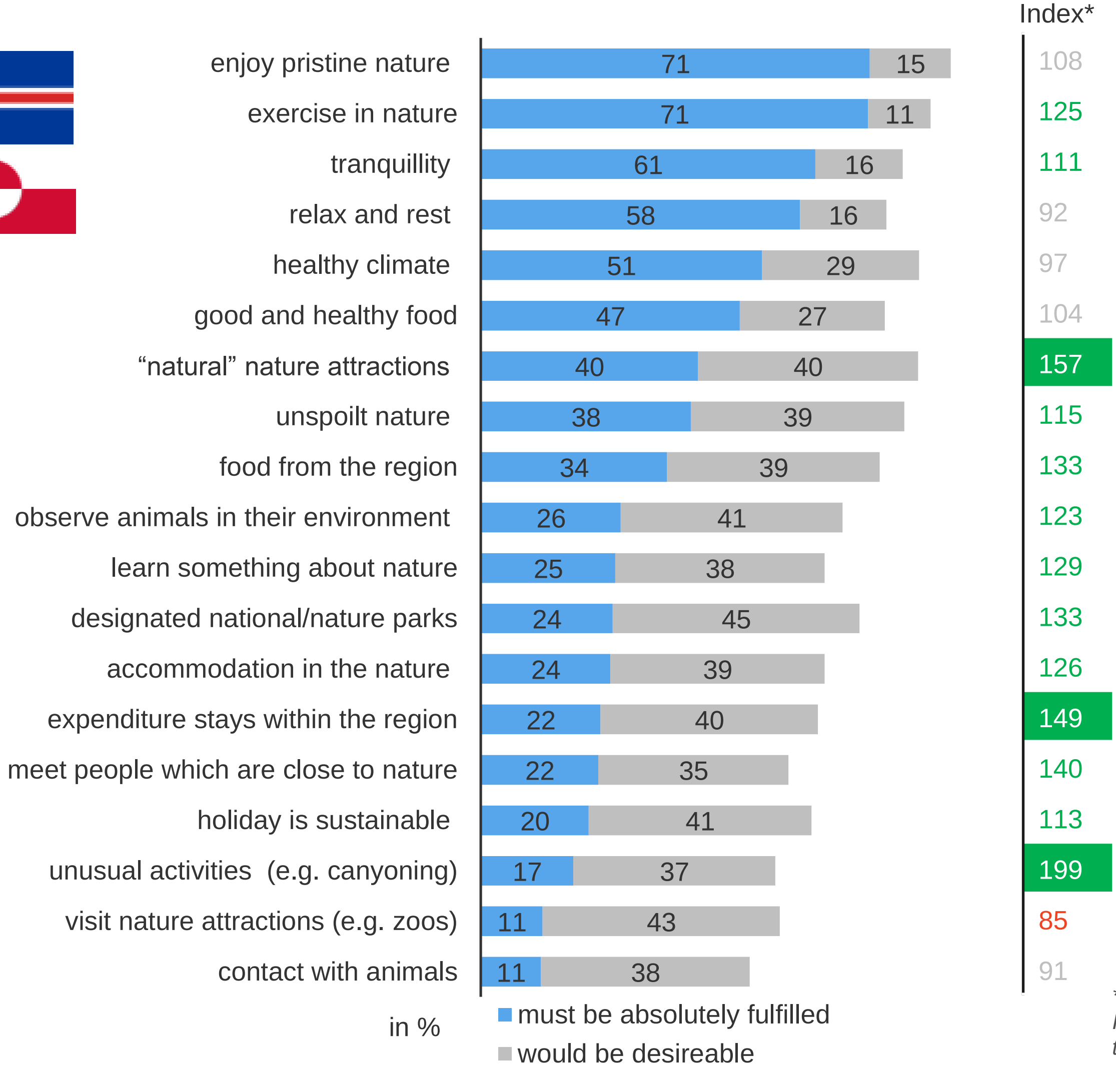
» As the experience of nature is central when travelling to Greenland/Faroe Islands/Iceland, we have decided to repeat two slides from the 2012 NATA study.

» This first slide is about the individual understanding of the term “nature holiday” in the German population.

» Concerning nature holiday, the understandings in the population are most widely connected with:
  - » A distinct environment (nature, animals, fresh air)
  - » A distinct scenery (mountains, forests, lakes)
  - » Distinct activities (hiking, camping, cycling)

Source: RA 2012: Extra CAPI-Omnibus Survey (9/2011)
Basis: German-speaking population 14+ years

Product requirements nature holiday of the potential guests to Iceland/Greenland

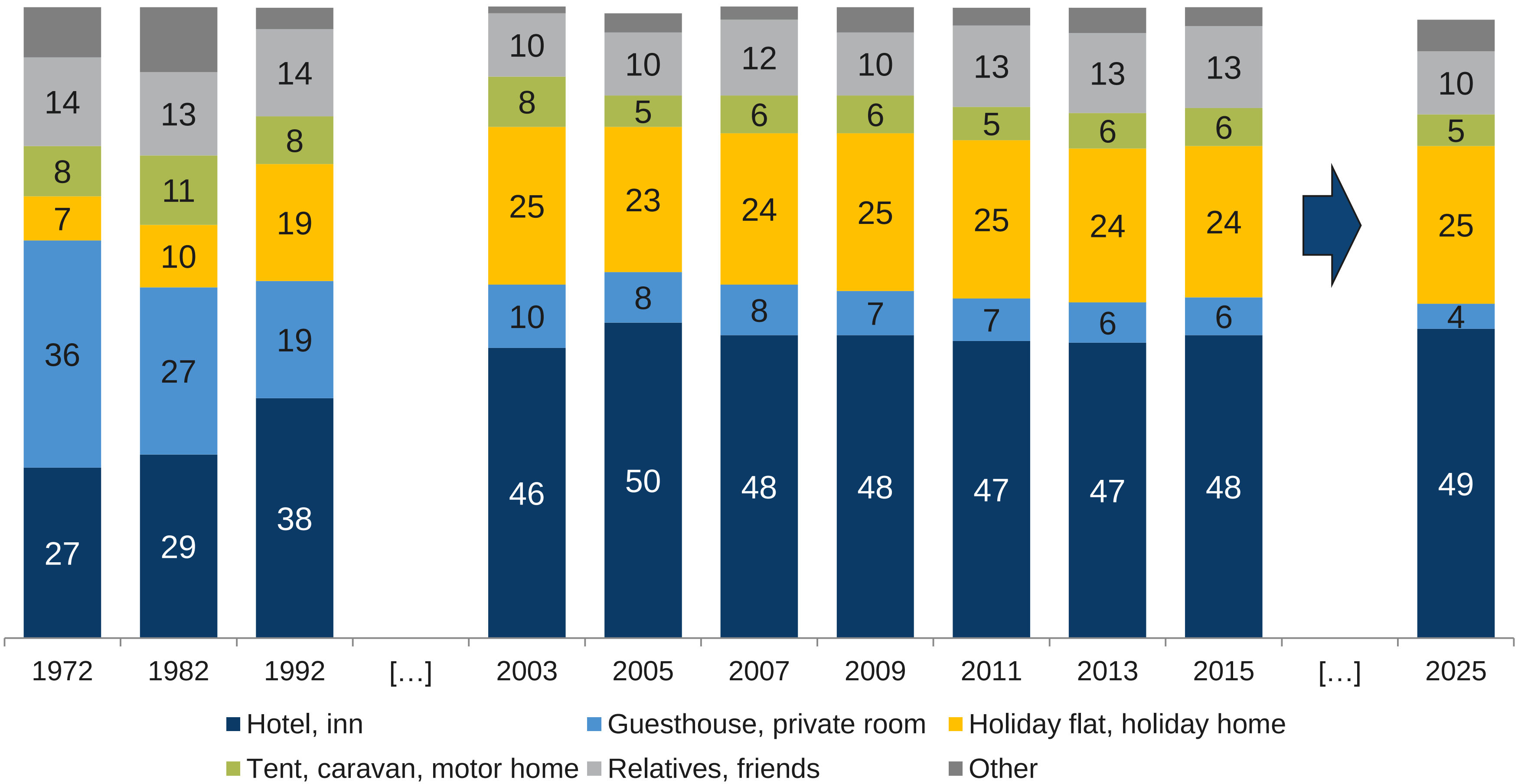


- When taking a nature holiday, for 71% of all persons interested in visiting Iceland/Greenland 2012-2014 the product requirement “enjoy pristine nature” has to be absolutely fulfilled. A further 15% find this characteristic desirable.
- The following must-criteria continue in the ranking:
  - Exercise in nature
  - Tranquility
  - Relaxing and resting
  - Healthy climate
- The biggest differences compared to the German population can be found in “secondary” requirements:
  - Unusual activities
  - “Natural” nature attractions
  - Expenditure stays in the region

** Figures of potential guests to Iceland/Greenland compared to German population*

Source: RA 2012 face-to-face; Basis: Persons not negative towards a nature holiday:, Interested in Iceland/Greenland 2012-2014 (“almost definitely planning” or “generally considering”), German-speaking population 14+ years

Accommodation 1972–2015 and trend 2025



Holiday trips (5+ days), share in %, 1972, 1982: only main holiday trip.
German/German-speaking resident population aged 14 years and older in Germany (1972, 1982: only West Germans; from 2010 on: incl. foreigners).
RA 1972–2016 *face-to-face*

Trends 2025 regarding types of holiday and holiday accommodation

- As for the development of the types of holiday trip, we see a continuous process of change which will not be dramatic from year to year, but nonetheless considerable over the long term. A decline is to be expected for resting holidays and health holidays, as are increases in holidays at the beach and sightseeing holidays as well as city travels and wellness holidays.
- The trends of the holiday activities are in line with the trends of the types of holiday, the general rule is: Just lazing about is not enough for most holidaymakers. People who are on holiday want to experience something, whether going on outings, enjoying culinary pleasures, shopping, or going swimming. Yet they do not want to overdo their activities – only few people engage in “real” sport when on holiday.
- When taking a nature holiday, for 71% of all persons interested in visiting Iceland/Greenland 2012-2014 the product requirement “enjoy pristine nature” has to be absolutely fulfilled. A further 15% find this characteristic desirable. The following must-criteria continue in the ranking: Exercise in nature, Tranquility, Relaxing and resting, Healthy climate. The biggest differences compared to the German population can be found in the “secondary” requirements Unusual activities, “Natural” nature attractions, Expenditure stays in the region.
- As for holiday accommodation, we expect only minor changes in the market shares: hotels dominate the market and, like holiday flats and holiday homes, will tend to increase their market share, while guest-houses and private rooms will be used less frequently. The various forms of camping and caravanning appear to remain largely stable.

- The results of types of holidays are a bit more concrete than the general motivations: Trends here can be a good orientation for marketing decisions of the three NATA destinations on the German market.
- The tourism product of Greenland/Faroe Islands/Iceland should fit well with the general trend of not only lazing around but being open for experiences.
- Some relevant types of holiday show an upward general trend, some rather a downward trend. This should be considered when taking a closer look at segments of potential guests.

Sources of information for the main holiday trip 1986–2012 (selection; results for German population)

Only German holiday travellers (without foreigners), sources of information for the main holiday trip	1986	2000	2008	2012
Base (million)	*27.5*	*48.4*	*48.5*	*49.0*
Friends, relatives	33%	42%	52%	55%
Travel agency	19%	35%	39%	44%
Travel organizer[1]	15%	23%	23%	
Travel guide	6%	12%	13%	15%
Articles in the press[2]	6%	5%	5%	14%
Trade fairs	1%	2%	2%	2%
"Internet"	–	*6%*	*32%*	*51%*

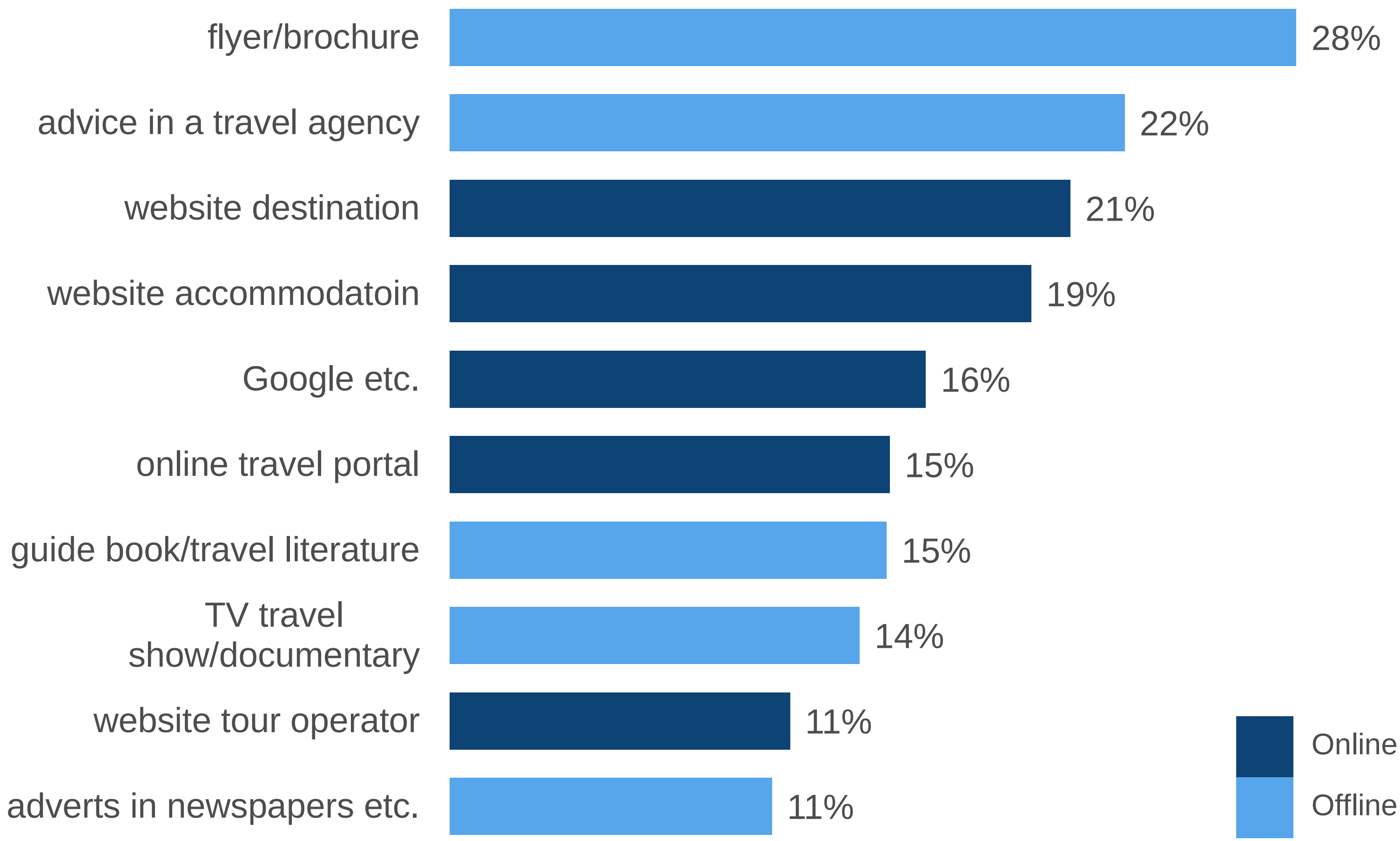
[1] 1986 and 2000: brochures, catalogues.

[2] 1986, 2000, and 2012 (offline): in newspapers and magazines.

Use of selected sources of information for the **main holiday trip (5+ days)** in 1986, 2000, 2008, and 2012, in %.

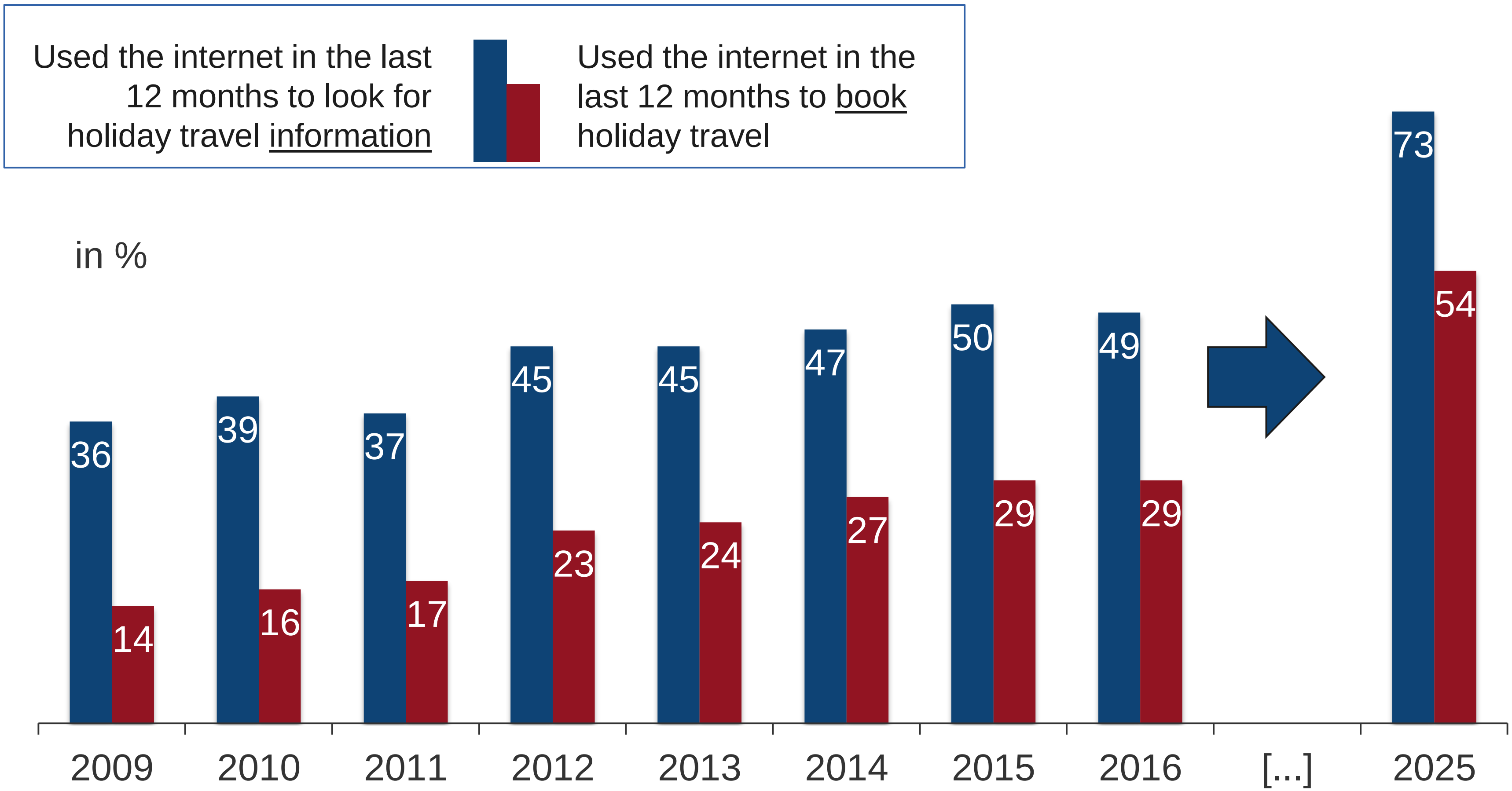
Holiday travellers among the German resident population aged 14 years and older in Germany, RA face-to-face 1986, 2001, 2009, 2013.

Sources of inspiration and information for holiday planning (Top 10)



Basis: main holiday trips 2015 (= most important trip 5+ days) of German-speaking population 14+ years
Source: RA 2016 *face-to-face, Module Inspiration and Information: travellers' use of marketing tools*

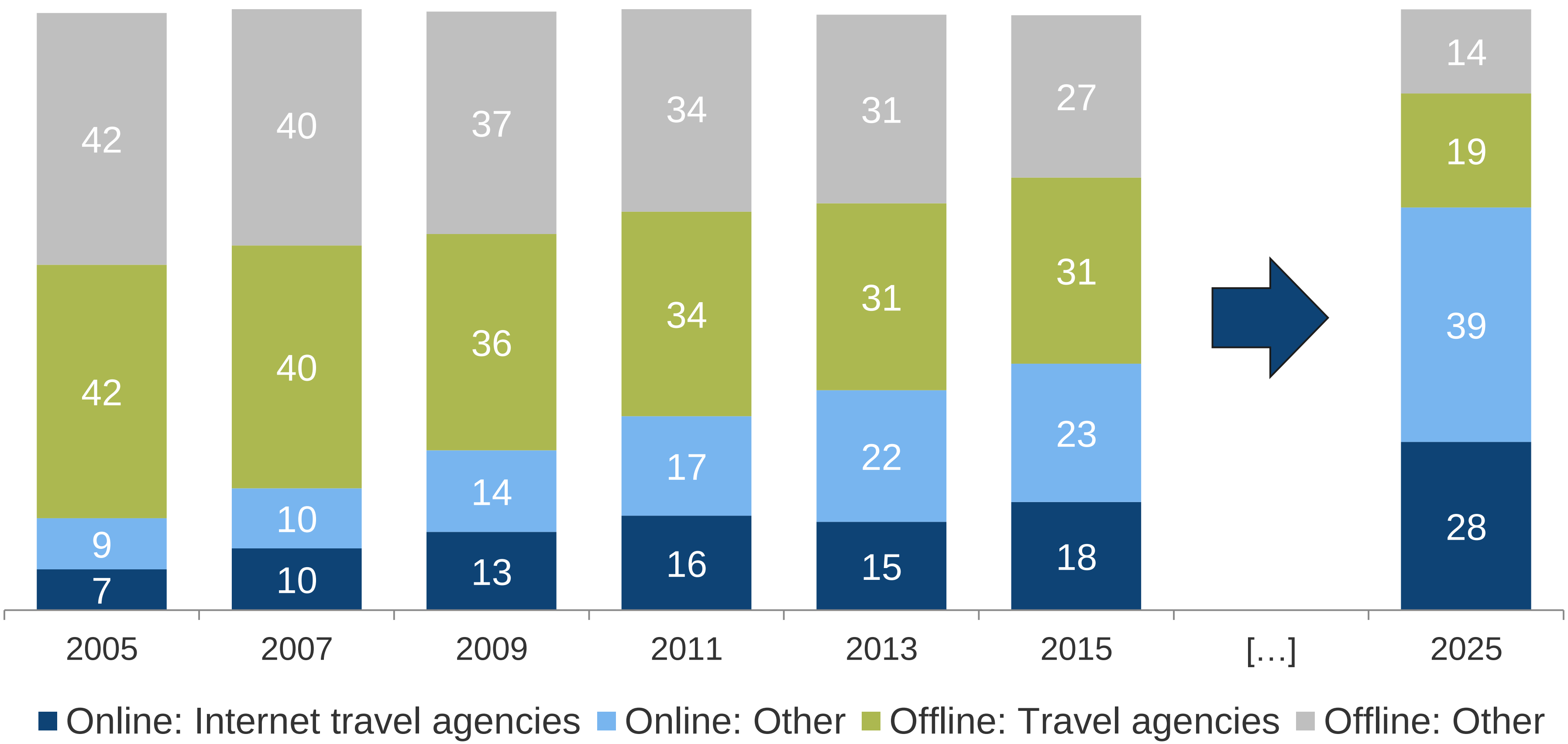
Internet use for holiday planning and trend 2025: In 2025 a vast majority of travellers will use the internet for planning



German-speaking population of 14+ years
RA 2009 to RA 2016 *face-to-face*

Holiday trip booking channels 2006-2015 and trend 2025: Much more than 50% market share in 2025

in %



Holiday trips with pre-bookings (lasting 5 days or more), share in %,
German/German-speaking resident population aged 14 years and older in Germany (from 2010 on: incl. foreigners).
RA 2006–2014 face-to-face.

Trends 2025 regarding holiday information and booking

- As for gathering information prior to travelling, there has been an inflation of information sources in recent years: nearly all information sources have been used more frequently, and the internet has provided ever more options for obtaining information prior to the holiday.
- A central driving force behind the changes in travel preparations is therefore the use of the internet, which has grown considerably in recent years. It is to be assumed that this development will continue until 2025. The number of internet users will probably increase further, and mobile internet use will show even stronger growth. Since the number of holiday travellers is likely to remain about the same, it follows that the number of "travelling onliners" is going to climb. This will be accompanied by a more intensive use of the internet both for obtaining information and for booking trips.
- This might signify a further shift towards **online booking channels**, which would result in a continued loss of market shares of brick-and-mortar travel agencies. This would mean that the majority of holiday travels will be booked online even before 2020.
- It is a development that is in line with the expected further decrease of package holidays.

- Due to the high dynamics in technology, the dynamics in holiday travel planning are also high.
- It is important to know about the nature and also about the speed of these dynamics.
- This is why we cover the preferred information and inspiration sources as well as preferred types of online content in the questionnaire, specifically linked with the three NATA destinations.

ANNEX B:
Outbound travel trends on the BRITISH market

[Source: "Travel trends: 2015" by the British Office for National Statistics (ONS): http://www.ons.gov.uk/peoplepopulationandcommunity/leisureandtourism/articles/traveltrends/2015, Chapter 8: "UK residents' visits abroad]

Office for National Statistics

Article

Travel trends: 2015

Travel Trends is an annual report that provides estimates and profiles of travel and tourism visits (those of less than 12 months' duration) and associated earnings and expenditure between the UK and the rest of the world. The International Passenger Survey (IPS) has been providing the source data for travel and tourism since 1961.

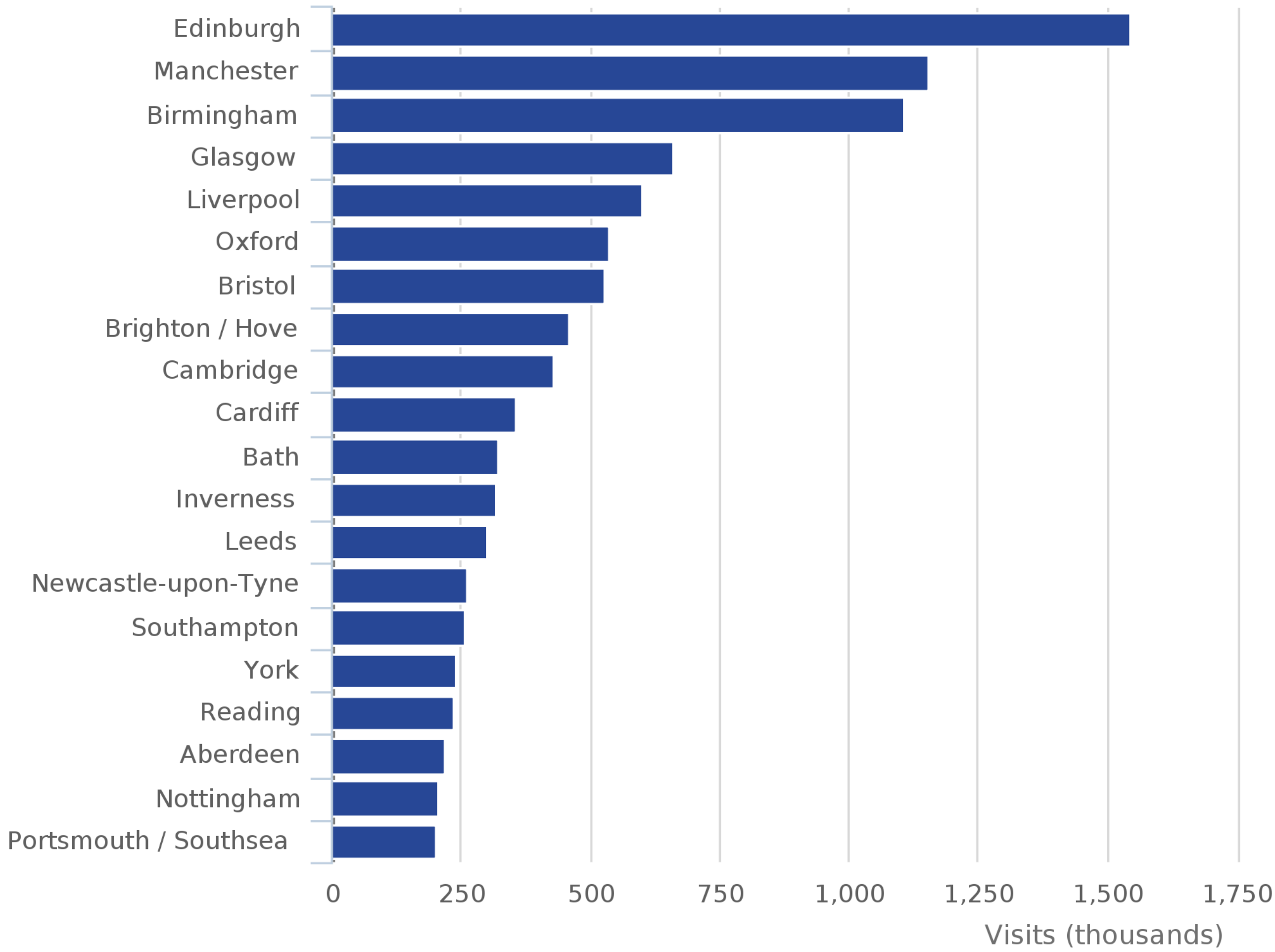
Contact:
Giles Horsfield
socialsurveys@ons.gsi.gov.uk

Release date:
20 May 2016

Next release:
May to June 2017

Table of contents

Figure 11: Top 20 UK towns and cities (excluding London) visited for at least 1 night, 2015



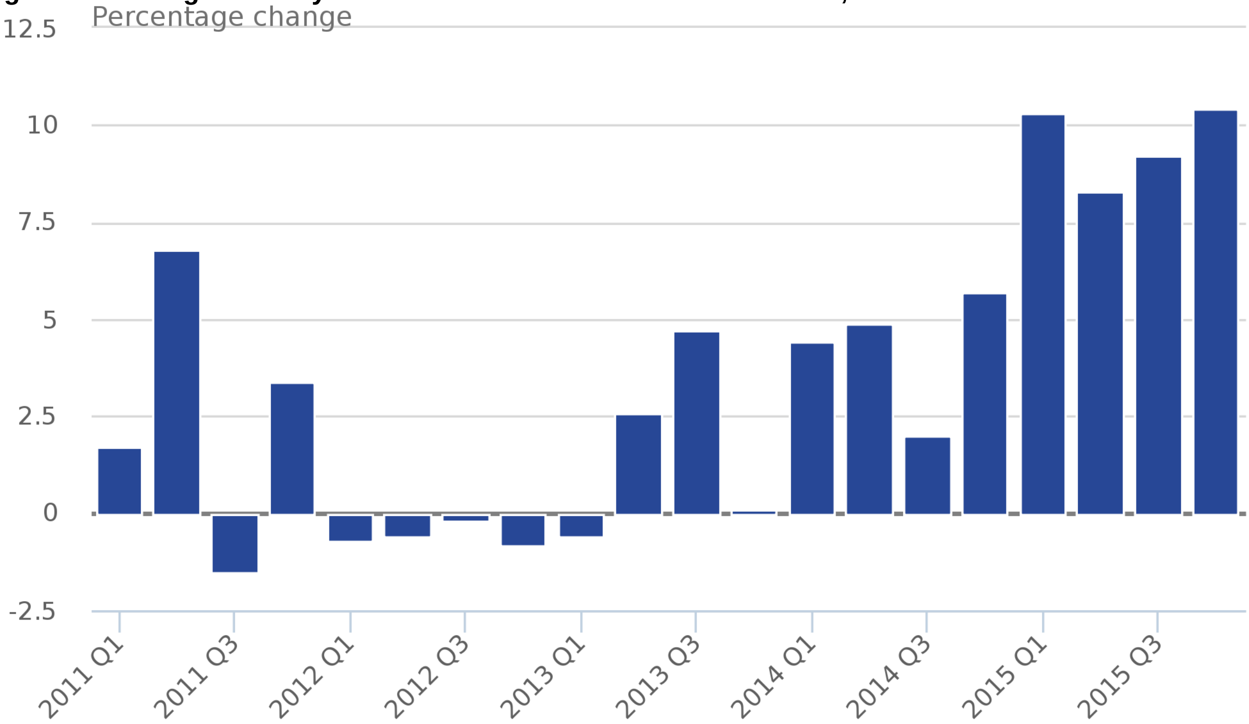
Source: International Passenger Survey (IPS) - Office for National Statistics

8. UK residents' visits abroad

The total number of visits abroad by UK residents has increased from 55.6 million in 2010 to a peak of 65.7 million visits in 2015. When compared with the previous year, the number of visits was higher every quarter in 2014 and 2015. There were large increases in both Quarter 1 (Jan to Mar) and Quarter 4 (Oct to Dec) of 2015; the number of visits rose in these quarters by over 10% when compared with the same quarters in 2014.

Spending overseas by UK residents also increased every quarter when compared with the corresponding quarter of 2014 and was the highest ever at £39.0 billion in 2015. The largest growth, 13.7% was seen in Quarter 3 (July to Sep) when spending abroad peaked at £14.4 billion. Apart from a small fall in spending during Quarter 2 (Apr to June) of 2014 (a decline of 1.3%), the amount spent abroad by UK residents has continued to increase since the beginning of 2013 when quarters are compared with the same period 1 year previously.

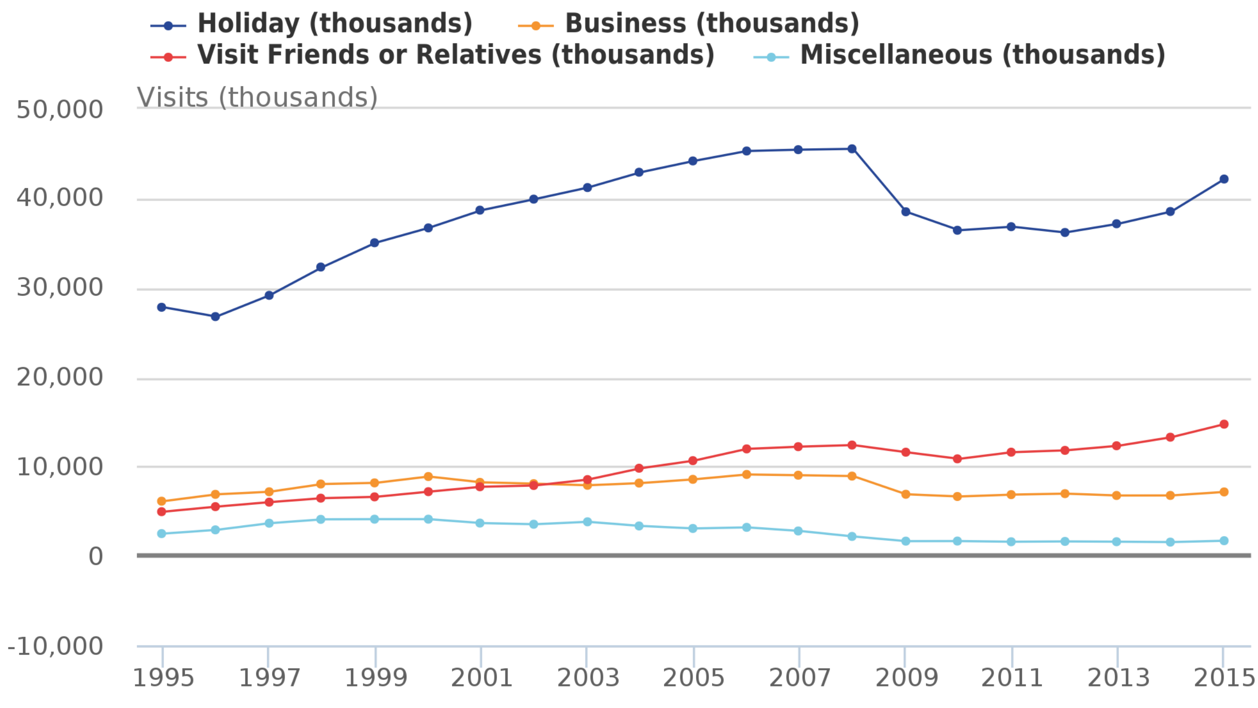
Figure 12: Change from a year earlier in UK residents' visits abroad, 2011 to 2015



Source: International Passenger Survey (IPS) - Office for National Statistics

Nearly two-thirds of UK residents' visits abroad were for holidays; this was constant over the 5 year period from 2011 to 2015. Most of these visitors travelled to countries within the EU; there were 32.2 million holiday visits in 2015, a 10.0% increase on the previous year. Visiting friends or relatives was also popular with UK residents. The number of these visits saw average annual growth of 6.2% which resulted in 14.7 million visits in 2015.

Figure 13: UK residents' visits abroad by purpose, 1995 to 2015

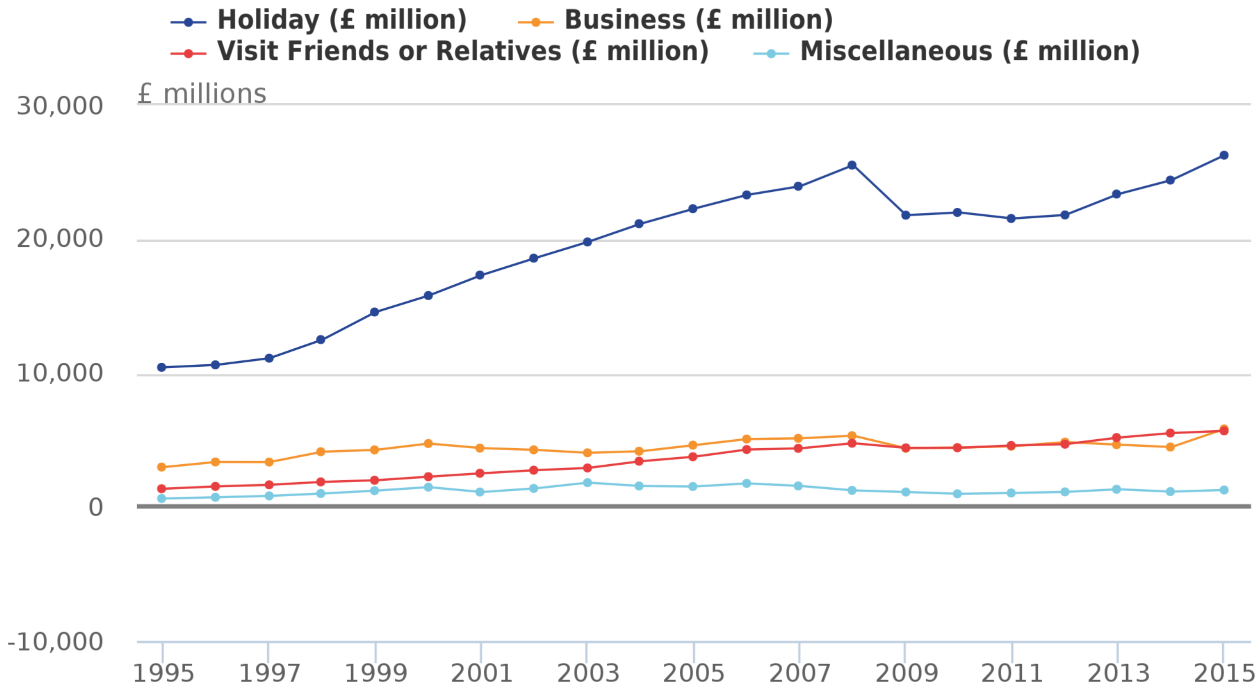


Source: International Passenger Survey (IPS) - Office for National Statistics

Spending abroad increased for all purposes in 2015. UK residents travelling abroad for holidays spent £26.3 billion in 2015, two-thirds of the total. The largest growth between 2014 and 2015 was for business trips;

spending on these visits increased by £1.4 billion to £5.8 billion in 2015, a growth of 30%. The majority of this increase (£0.9 billion) was spent on business trips to Europe.

Figure 14: UK residents' spending on visits abroad by purpose, 1995 to 2015



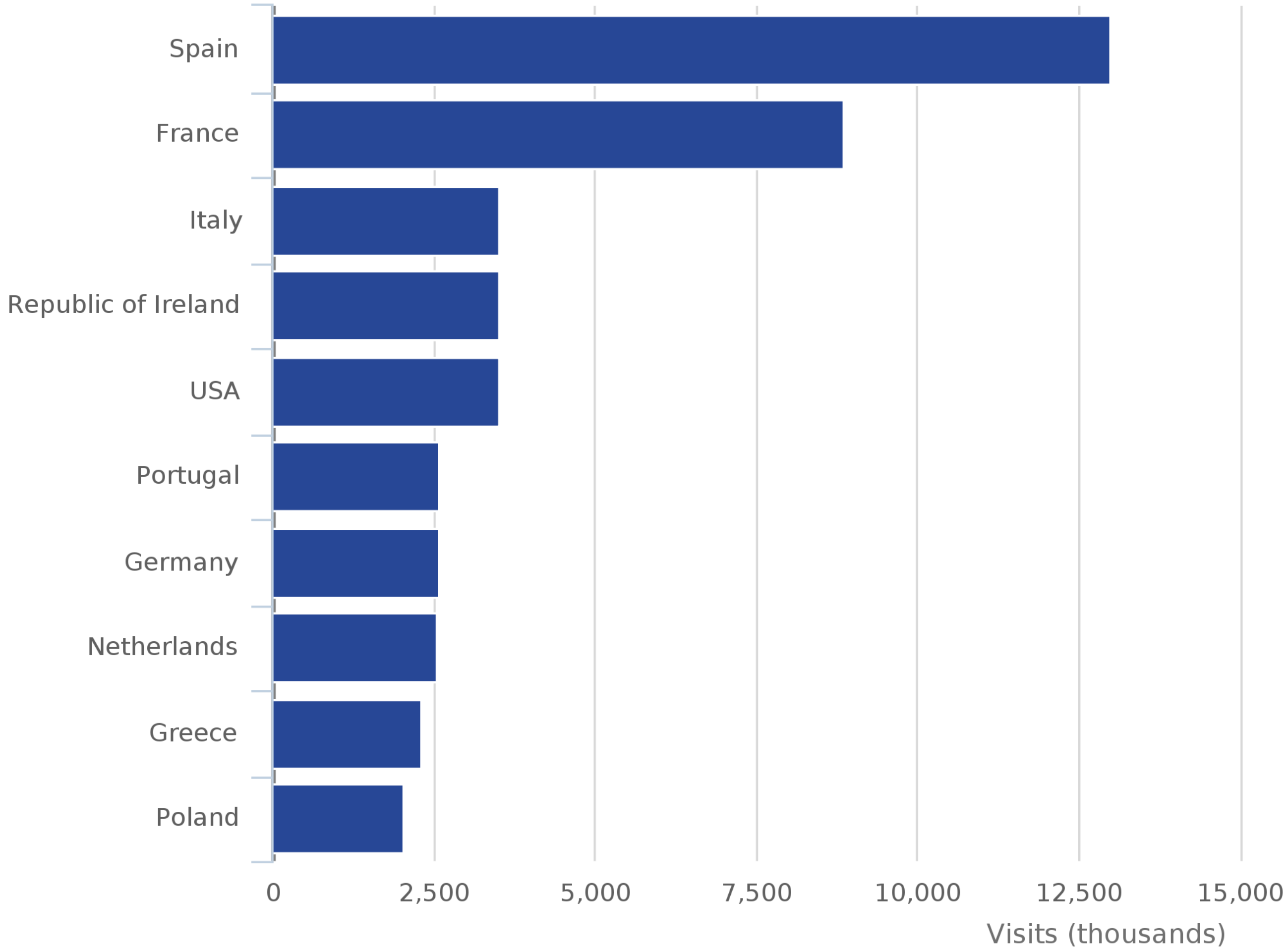
Source: International Passenger Survey (IPS) - Office for National Statistics

The number of nights spent abroad increased a small amount (an increase of 66,000) between 2014 and 2015, but the average length of stay has remained constant since 2011 at around 10 nights. This is likely to be due to the popularity of shorter breaks taken more frequently during the year. Visits to Europe, the closest destination from the UK, were shorter on average at 8 nights. Average length of stay was higher for countries outside Europe and North America, an average of 21 nights compared with visits to North America where the figure was 14 nights.

The highest spend per visit was for visits to North America, at £1,259, with an average spend per day of £88. UK residents visiting countries outside Europe and North America tended to spend much less per day (an average of £47) but spent £983 on an average stay overall. This compared with European trips where the average spend per visit was just £467 (with a spend per day of £58).

Spain and France remained the most popular countries for visits by UK residents. The number of visits to Spain increased by 22% from 10.7 million in 2011 to 13.0 million in 2015. Trips to France decreased by a small number over this period from 8.9 million to 8.8 million. The USA, Italy and the Republic of Ireland completed the top 5 most popular countries for UK residents to visit. Of the two million visits to Poland, most were made by UK residents who were Polish. Of the total visits there in 2015, 70% (1.4 million) were made by Polish nationals. This was similar for visits to Romania (77%) and Slovakia (62%), but the number of visits to these countries was much smaller (0.5 million and 0.2 million respectively).

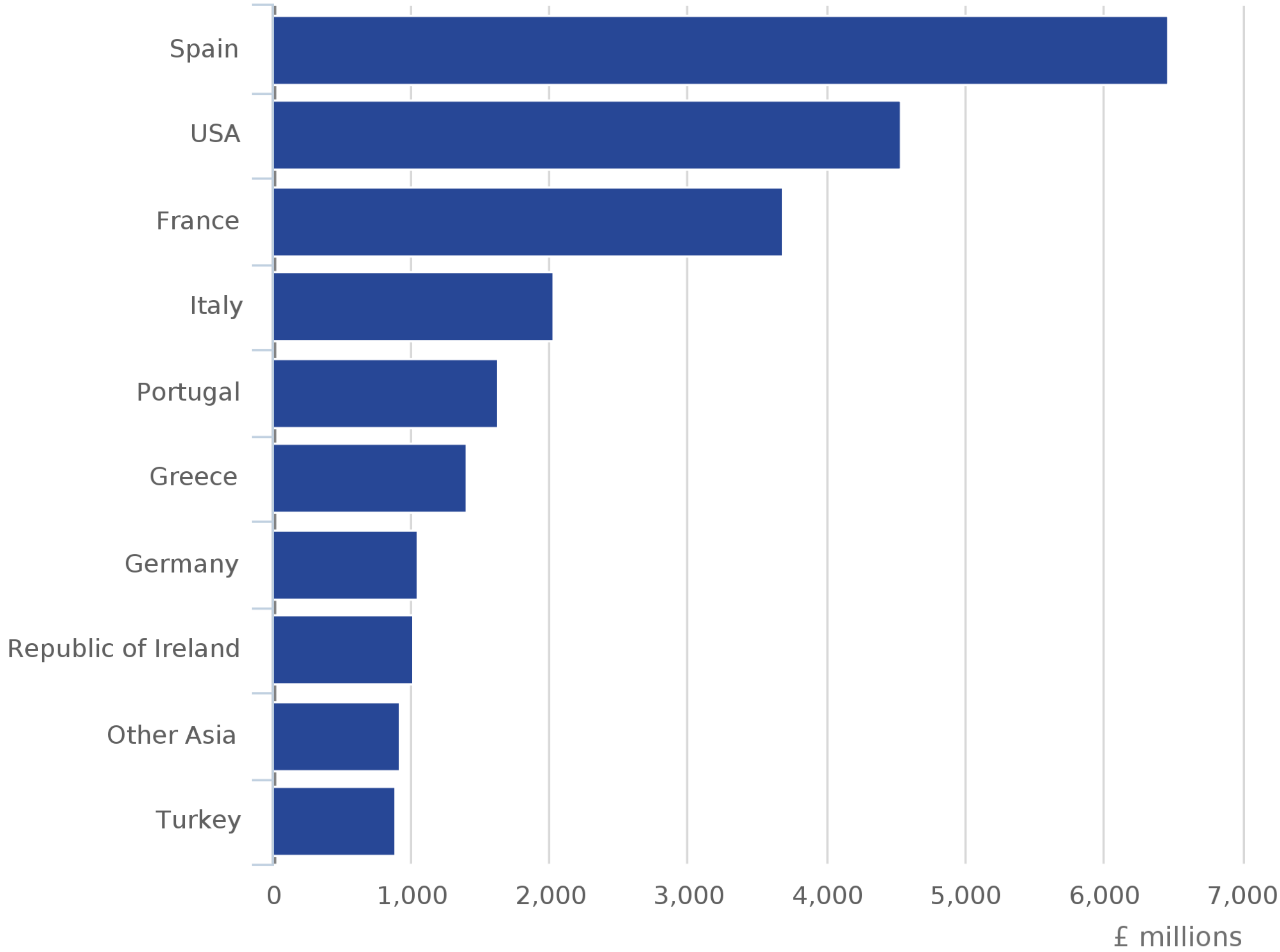
Figure 15: Top 10 countries visited by UK residents for at least 1 night, 2015



Source: International Passenger Survey (IPS) - Office for National Statistics

The 5 countries with the highest expenditure by visitors from the UK were slightly different from the 5 most-visited countries, with the Republic of Ireland being replaced by Portugal. Total UK residents' expenditure was highest in Spain, with total spending increasing by 5.4% in 2015 to a total of £6.5 billion, which accounts for 17% of all spending by UK residents abroad. The USA was the next highest total in 2015 at £4.5 billion, an increase of 16% from 2014. Figure 16 shows the top 10 countries in terms of spending abroad by UK residents, which remains the same as 2014.

Figure 16: Top 10 countries by expenditure of UK residents whilst visiting abroad for at least 1 night, 2015



Source: International Passenger Survey (IPS) - Office for National Statistics

Holidays were the most popular reason for UK residents travelling abroad in 2015, accounting for 68% of visits from residents of England (excluding London), 71% of Scottish and 75% of Welsh residents. However, only 48% of visits overseas by London residents were for holidays. Residents of regions outside London were also more likely to choose an inclusive tour, with only 23% of Londoners' holidays being of this type compared with more than 40% for all other areas. UK residents living in London were more likely to travel for business than those from other regions, with 16% of visits for this reason. These 2.3 million visits accounted for 23% of the money spent abroad by Londoners (£2.0 billion).

Visits overseas by London's residents were more likely to be to countries outside Europe or North America than visits by residents of other UK regions; 19% of visits by Londoners were to these areas of the world compared with between 11 and 14% from other regions.

9. Appendix A: Definitions

1. The figures relate to the number of completed visits, not the number of visitors. Anyone entering or leaving more than once in the same period is counted on each visit. The count of visits relates to UK residents returning to this country and to overseas residents leaving it.

2. Day-visits (that is trips that do not involve an overnight stay) abroad by UK residents as well as day trips to the UK by overseas residents are included in the figures for visits and expenditure. Note 3 in sub-section Traveller Exclusions refers to overseas residents in transit through the UK. Please note day visits to or from the Republic of Ireland across the land border are excluded, although they are included in total visits.

3. An overseas visitor means a person who, being permanently resident in a country outside the United Kingdom, visits the UK for a period of less than 12 months. UK citizens resident overseas for 12 months or

ANNEX C:
Outbound travel trends on the US market

[Source: U.S. Travel and Tourism Statistics "2014 Outbound Analysis": http://travel.trade.gov/outreachpages/download_data_table/2014_Outbound_Analysis.pdf and "2014 Profile of U.S. Resident Travelers Visiting Overseas Destinations (Outbound)": http://travel.trade.gov/outreachpages/download_data_table/2014_Outbound_Profile.pdf, both by the US National Travel & Tourism Office]

INTERNATIONAL TRADE ADMINISTRATION

July 24, 2015

U.S. Resident Travel to International Destinations Increased 10 Percent in 2014
Strong Growth in U.S. Outbound Travel from the Pacific States
Subtle Changes in Traveler and Trip Characteristics

The U.S. resident outbound market totaled 68.2 million in 2014, up 11 percent from 2013. Travel to overseas countries (30.8. million) increased six percent, to Canada (11.5 million) up marginally and travel to Mexico (25.9 million), singly the largest outbound market, was up 24 percent.

The top five destination countries visited by U.S. residents in 2014 were: Mexico (25.9 million) and Canada (11.5 million), followed by the overseas countries of the United Kingdom (2.8 million), Dominican Republic (2.7 million) and France (2.1 million). Nine of the top 10 destinations visited by U.S. travelers posted increases in 2014.

The top origin regions/states from which U.S. residents traveled to overseas destinations:

- Middle Atlantic States (New York, New Jersey and Pennsylvania), with a 24 percent share of all U.S. regions, was up one percent compared to 2013.
- South Atlantic States (primarily Florida, Georgia, Virginia, Washington, D.C., Maryland and North Carolina) accounted for 20 percent and travel was up seven percent.
- Pacific States (California and Washington) generated 16 percent of outbound travel and was up 18 percent from 2013.
- West South Central States (mainly Texas) registered a 10 percent share and travel was up two percent.
- Travel from East North Central (primarily Illinois, Ohio and Michigan) accounted for 10 percent and was up eight percent.

<u>U.S. Overseas Traveler and Trip Characteristics</u>:

Select highlights from 2014:

- **Main trip purpose** for vacation/holiday estimated at 51 percent of overseas travelers was up eight percent in volume from 2013. Visiting friends and relatives (VFR) was the second-highest main trip purpose, at 27 percent, and was up in volume seven percent from 2013. **Overall leisure/VFR travel was up seven percent** in 2014. Business travel, as the main purpose of trip, comprised 11 percent of outbound travel; with volume up three percent from 2013. Convention travel was three percent of travel and the number of convention travelers increased nine percent in 2014. **Overall business/convention travel was also up seven percent**.
- The top ten ports of departure for U.S. citizens were New York (JFK), Miami (MIA), Atlanta (ATL), Newark (EWR), Los Angeles (LAX), Chicago (ORD), Washington (IAD), San Francisco (SFO), Houston (IAH) and Boston (BOS) which accounted for 76 percent of U.S. departures.

- Advance trip decision time and airline reservation time held at an average of 98 days and 68 days prior to departure, respectively, in 2014 compared to 2013.
- As an information source for trip planning, airlines were most used (51 percent), along with online travel agencies (OTA) (31 percent) and conventional travel agencies (18 percent). More than a third of travelers booked directly through the airlines (38 percent), a majority booked indirectly via either an Internet booking service (29 percent) and/or a travel agency (21 percent).
- Pre-paid package usage decreased one percentage point to 12 percent of U.S. travelers.
- The average length of trip (number of nights) outside the United States decreased slightly to 17.1 nights in 2014.
- Eight percent of travelers were on their first international trip, up one point from 2013, meaning repeat travelers decreased slightly. The average number of international trips taken by U.S. travelers in the last 12 months was 2.6, about the same as in 2013.
- The number of destinations visited averaged 1.8 in 2014. The percentage visiting only one destination increased to 57 percent, and those visiting three or more destinations decreased from 23 percent to 20 percent in 2014.
- Travel party size increased from 1.5 to 1.6.
- The modes of inter-city transportation used by U.S. travelers between destinations overseas were airline (66 percent, up from 64 percent in 2013), bus (21 percent), and railroad (14 percent). The top modes of intra-city transit were taxicab/limo (31 percent) and subway/tram/bus (21 percent). The use of private and/or rented autos was 39 percent and 11 percent, respectively. Five percent traveled on cruise/river boat for overnight trips. Seven percent took short scenic cruises or used a ferry/river taxi.
- Top leisure activities for U.S. travelers were sightseeing, shopping, visiting small town/countryside, visiting historical locations, experiencing ‘fine dining’ (gastronomy), taking guided tours, visiting art galleries/museums, experiencing cultural/ethnic heritage sites and visiting national parks and monuments.
- Average international airfare per visitor, per trip, was $1,347 USD, down two percent from 2013, and average expenditures (travel payments) per visitor, per trip, while overseas were $1,484, down five percent from 2013. The usage of credit cards increased to 55 percent. Cash brought from home and cash withdrawn from an ATM using credit/debit cards and purchases using debit cards composed 45 percent.
- Airfare and convenient schedules were main factors in airline choice. Over 82 percent ‘paid’ for the ticket without the use of awards, upgrades or deeply discounted fares. Seventy eight percent flew in coach or economy class.
- Travel insurance was purchased for the trip by 28 percent of respondents, the same as 2013
- Twelve percent visited a health care provider in advance of their trip, the same as in 2013.

Demographic Data:

- Fifteen percent of respondents identified themselves as Hispanic. Sixteen percent identified as Asian, eight percent as Black, and three percent as American Indian/Alaskan Native or Hawaiian Islander. Fifty-eight percent of U.S. citizens who visited Asia in 2014 identified themselves as Asian. Fifty-five percent of those visiting South America had identified as Hispanic.
- Females composed slightly over half of U.S. travelers to overseas. The number of women travelers continues to increase. (In 2000 women were 39 percent of U.S.

outbound.) The average age of male travelers was 45.4, up from 2013; female travelers averaged 44.0 years, slightly up from 2013.

- Average household income was $123,000, the same as in 2013. First time traveler households reported $93,000 and repeat traveler households reported $128,000 annual income. Seven percent of traveler households earned $300,000 or more. Business and convention travelers earned an average $157,000.

Top Outbound Destination Markets

Mexico

Mexico was the top U.S. international destination again in 2014 with a record setting 25.9 million travelers, up 24 percent from 2013. According to Banco de Mexico ‘Tourist’ (non-border) travel increased 11 percent in 2014 compared to 2013. However, those who traveled across the border for 1+ nights increased 41 percent. Longer-haul travel by air totaled 6.9 million, and was up 11 percent from 2013. With the exception of ‘Border only 1+ nights,’ which spiked in 2014, travel to Mexico has remained relatively stable over the last 10 years. The strongest growth periods were in 2008, 2010, 2013 and 2014.

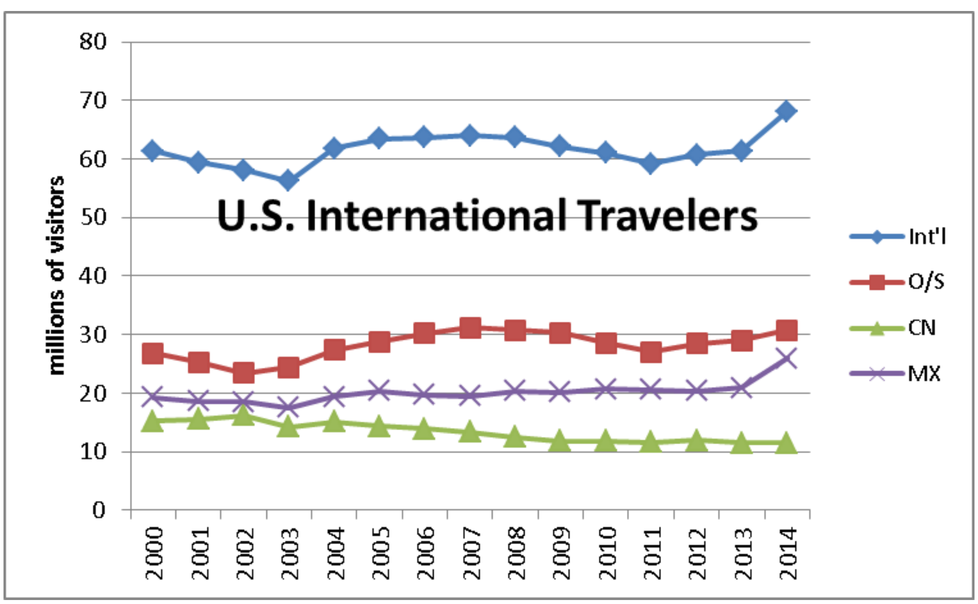
Canada

Canada continues to be the second-most visited country by U.S. travelers. In 2014, 11.5 million U.S. travelers visited Canada, up less than one percent from 2013. Longer haul travel, by air (3.4 million), was up six percent. The peak year for U.S. travel to Canada was in 2002 with 16.2 million U.S. travelers. Since then, U.S. travel to Canada has declined in five of the last 10 years.

Overseas

In 2014, 30.8 million U.S. travelers visited overseas markets, an increase of six percent from 2013.

Travel was up in seven of the top ten overseas markets: the United Kingdom, France, Italy, Germany, Spain, China, India and Philippines/Netherlands (tied). Visitation to Jamaica, Japan and Ireland was down.



For more detailed information, please go to the Outbound Overview page on NTTO's website, which contains links to in-depth information on the outbound market: http://travel.trade.gov/outreachpages/outbound.general_information.outbound_overview.html

In the 2014 outbound section, interested parties will find:

- 2014 Profile of U.S. Resident Travelers Visiting Overseas Destinations. (The profile provides key information on travel patterns, traveler characteristics and spending by U.S. travelers going abroad. Several new tables have been included since the 2012 questionnaire change. In addition, a breakdown is provided on leisure/visiting friends and relatives (VFR) travelers and business/convention travelers.)
- 2014 U.S. to Europe Profile
- 2014 U.S. to Asia Profile
- 2014 U.S. to Overseas Destinations for Business/Conventions Profile
- 2014 U.S. to Overseas Destinations for Leisure/VFR Profile
- Top Destinations Visited by U.S. Resident Travelers 2013-2014
- Top 30 Ports of Departure (to overseas) in 2014 for U.S. Citizens
- Total International Travelers Volume to/from the United States 2005 – 2014
- U.S. Resident Travel to Canada, Mexico and Overseas (Historical 2000 – 2014)
- 10 Year Historical Travel Import Timelines
- Monthly U.S. international non-stop air traffic figures. (While air traffic is not the same as 'visitation,' it does provide a current indication of air traffic flows for U.S. citizen outbound travel.)

In addition to the data available on the web site, parties interested in subscribing to detailed standardized reports and/or customized data can do so by visiting the NTTO web site at: http://travel.trade.gov/research/programs/ifs/index.html

If the information needed is not on the website or in the standard reports sold by NTTO, custom tables and reports are available from the database. Go to: http://travel.trade.gov/research/reports/ifs/customized.html

The Survey data tables and standard national reports can assist the industry in understanding U.S. travelers going abroad. 48 subsets of the data are also available based on 40 questions asked of U.S. outbound travelers.

For additional information or questions, please contact:

U.S. Department of Commerce
International Trade Administration/Industry & Analysis
National Travel and Tourism Office (NTTO)
1401 Constitution Avenue NW, Mail Stop 10003
Washington, D.C. 20230
Phone:(202) 482-0140
Fax: (202) 482-2887
Website: //travel.trade.gov
Email: ntto@trade.gov

U.S. Department of Commerce
International Trade Administration

National Travel and Tourism Office

Profile of U.S. Resident Travelers Visiting Overseas Destinations: 2014 Outbound

U.S. Resident Travelers to Overseas Destination

U.S. Resident Travelers to Overseas Destinations: (1) Total Number of Travelers**	All U.S. Travelers
Region/State/City of Residence	**30,780,000**
New England	**7%**
Massachusetts	4%
Connecticut	2%
Middle Atlantic	**24%**
New York	14%
New York City	11%
Nassau	2%
New Jersey	6%
Pennsylvania	4%
Philadelphia	2%
East North Central	**10%**
Michigan	3%
Illinois	3%
Chicago	2%
Ohio	2%
West North Central	**5%**
Minnesota	2%
East South Central	**3%**

Profile of U.S. Travelers Visiting Overseas Destinations: 2014

U.S. Resident Travelers to Overseas Destinations	All U.S. Travelers
Total Number of Travelers **	**30,780,000**
South Atlantic	**20%**
Florida	7%
Miami	3%
Virginia	3%
Georgia	3%
Atlanta	2%
North Carolina	2%
Maryland	2%
D.C. Metro Area	3%
East South Central	**3%**
West South Central	**10%**
Texas	8%
Houston	3%
Dallas	2%
Mountain	**5%**
Colorado	2%
Pacific	**16%**
California	13%
Los Angeles	4%
Washington	2%
Seattle	2%
Pacific Islands	**0%**
Atlantic Islands	**0%**

(1) State and city of residence are listed if they represent at least 2% (rounded) of the U.S. travelers to overseas des tinations. States are listed in declining percentages within U.S. regions. Metro areas are listed in declining percentages within states.

** NOTE: Percentages listed in this profile can be converted into estimated numbers by multiplying percentage listed above by 30,780,000 (the total U.S. Residents visiting overseas destinations), 25,455,000 (82.7% Vacation/Hoilday & Visit Friends/Relatives) and 5,233,000 (17.0% Business/Convention).

Profile of U.S. Travelers Visiting Overseas Destinations: 2014

U.S. Resident Traveler Characteristics	All U.S. Travelers	For Vacation & VFR	For Business & Conv.
Total Number of Travelers **	**30,780,000**	**25,455,000**	**5,233,000**
Advance Trip Decision:			
Average Number of Days	98.4	106.2	55.0
Median Number of Days	60.0	90.0	30.0
Advance Airline Reservation:			
Average Number of Days			
Median Number of Days	67.6	74.0	36.3
	50.0	60.0	21.0
Means of Booking Air Trip*:			
Directly with the Airline	38%	40%	31%
Internet Booking Service	29%	31%	17%
Travel Agency Office	21%	21%	13%
Company Travel Department	10%	4%	41%
Tour Operator/Travel Club	7%	7%	2%
Other	3%	3%	2%
Information Sources*:			
Airline	51%	52%	47%
Online Travel Agnecy	31%	34%	21%
Travel Agency Office	18%	19%	13%
Personal Recommendation	19%	21%	10%
Corporate Travel Dept.	10%	4%	40%
Tour Company/Travel Club	8%	8%	3%
Travel Guide	7%	8%	4%
National/State/City Travel Office	4%	4%	3%
Other	6%	6%	5%

* Multiple Response.

** NOTE: Percentages listed in this profile can be converted into estimated numbers by multiplying the percentage by 29,015,000 (total U.S. Residents visiting overseas destinations), to yield 23,850,000 (82.2% Vacation/Holiday & Visit Friends/Relatives) and 4,875,000 (16.8% Business/Convention).

Rounded percentages were listed for all categories reported by 1% or more of the respondents and may not sum to 100%.

Profile of U.S. Travelers Visiting Overseas Destinations: 2014

U.S. Resident Traveler Characteristics	All U.S. Travelers	For Vacation & VFR	For Business & Conv.
Total Number of Travelers **	**30,780,000**	**25,455,000**	**5,233,000**
Use of Prepaid Package:			
Yes	13%	15%	5%
No	87%	85%	95%
Pre-Booked Lodging*:			
Responded - Yes	55%	54%	62%
Sources for Booking Lodging*:			
The Lodging Establishment Directly	19%	20%	19%
Internet Booking Service	15%	17%	12%
Travel Agency Office	9%	10%	4%
Corporate Travel Dept.	6%	2%	27%
Tour Operator/Travel Club	6%	6%	2%
The Airline	1%	1%	1%
Other	4%	4%	4%
Travel Companions*:			
Traveling Alone	64%	58%	83%
Spouse/Partner	22%	27%	8%
Family/Relatives	12%	15%	4%
Friends	5%	5%	1%
Business Associates	2%	0%	7%
Tour Group	1%	1%	0%
Travel Party Size: (persons)			
Adults Only	92%	91%	97%
Adults and Children	8%	9%	3%
Average Party Size	1.6	1.6	1.3
Median Party Size	1.0	1.0	1.0

* Multiple Response.

** NOTE: Percentages listed in this profile can be converted into estimated numbers by multiplying the percentage by 30,780,000 (total U.S. Residents visiting overseas destinations), to yield 25,455,000 (82.7% Vacation/Holiday & Visit Friends/Relatives) and 5,233,000 (17.0% Business/Convention). Rounded percentages were listed for all categories reported by 1% or more of the respondents and may not sum to 100%.

Profile of U.S. Travelers Visiting Overseas Destinations: 2014

U.S. Resident Traveler Characteristics	All U.S. Travelers	For Vacation & VFR	For Business & Conv.
Total Number of Travelers **	**30,780,000**	**25,455,000**	**5,233,000**
Main Purpose of Trip:			
Vacation/Holiday	51%	61%	5%
Visit Friends/Relatives	27%	33%	3%
Business	11%	2%	68%
Education	5%	2%	1%
Convention/Conference/Trade Show	3%	2%	21%
Religion/Pilgrimages	2%	1%	1%
Health Treatment	0%	0%	0%
Purpose of Trip*:			
Vacation/Holiday	62%	75%	19%
Visit Friends/Relatives	37%	45%	13%
Business	13%	4%	78%
Education	7%	5%	6%
Convention/Conference/Trade Show	5%	3%	29%
Religion/Pilgrimages	3%	2%	2%
Health Treatment	1%	1%	1%
Type of Accommodations*:			
Hotel, Motel	63%	60%	80%
Average Number of Nights	10.3	9.0	9.6
Median Number of Nights	7.0	7.0	6.0
Private Home	41%	45%	24%
Average Number of Nights	20.6	18.8	24.6
Median Number of Nights	12.0	12.0	8.0
Other	7%	7%	7%
Mean Number of Nights	13.3	11.0	16.2
Median Number of Nights	7.0	7.0	8.0

Profile of U.S. Travelers Visiting Overseas Destinations: 2014

U.S. Resident Traveler Characteristics	All U.S. Travelers	For Vacation & VFR	For Business & Conv.
Total Number of Travelers **	**30,780,000**	**25,455,000**	**5,233,000**
Nights Outside the U.S.:			
Average Number of Nights	17.7	16.4	16.8
Median Number of Nights	10.0	10.0	7.0
First International Trip:			
First Time Visitors	8%	8%	5%
Repeat Visitors	92%	92%	95%
Number of International Trips in the Past 12 Months:			
Mean Number of Trips	2.6	2.2	4.4
Median Number of Trips	2.0	2.0	3.0
Number of Countries Visited*:			
One Country	83%	83%	82%
Two Countries	11%	11%	14%
Three or More Countries	6%	6%	4%
Average (Countries)	1.3	1.3	1.2
Median (Countries)	1.0	1.0	1.0
Number of Destinations Visited*:			
One Destination	57%	56%	58%
Two Destinations	23%	23%	25%
Three or More Destinations	20%	21%	17%
Average (No. of Destinations)	1.8	1.9	1.7
Median (No. of Destinations)	1.0	1.0	1.0

* Multiple Response.

** NOTE: Percentages listed in this profile can be converted into estimated numbers by multiplying the percentage by 30,780,000 (total U.S. Residents visiting overseas destinations), to yield 25,455,000 (82.7% Vacation/Holiday & Visit Friends/Relatives) and 5,233,000 (17.0% Business/Convention). Rounded percentages were listed for all categories reported by 1% or more of the respondents and may not sum to 100%.

Profile of U.S. Travelers Visiting Overseas Destinations: 2014

U.S. Resident Traveler Characteristics	All U.S. Travelers	For Vacation & VFR	For Business & Conv.
Total Number of Travelers **	**30,780,000**	**25,455,000**	**5,233,000**
Transportation Outside the U.S.:*			
Air Travel between Non-U.S. Cities	66%	65%	70%
Company or Private Auto	39%	38%	43%
Taxicab/Limousine	31%	30%	44%
Bus between Cities	21%	22%	13%
City Subway/Tram/Bus	21%	21%	22%
Railroad between Cities	14%	14%	15%
Rented Auto	11%	12%	10%
Ferry/River Taxi/Srt Scenic Cruise	7%	7%	4%
Cruise Ship/River Boat 1+ Nights	5%	6%	1%
Rented Bicycle/Motorcycle/Moped	3%	3%	2%
Motor Home/Camper	1%	0%	1%
Port-of-Entry:			
New York City	20%	21%	13%
Atlanta	11%	11%	9%
Los Angeles	9%	9%	9%
Newark	8%	8%	7%
Miami	7%	6%	8%
Dallas/Ft. Worth	6%	6%	8%
Houston	5%	5%	6%
Chicago	5%	5%	6%
Washington, D.C.	5%	5%	6%
Philadelphia	3%	4%	3%
San Francisco	3%	3%	5%
Boston	3%	3%	3%
Detroit	2%	2%	3%
Charlotte	1%	1%	1%
Seattle	1%	1%	1%
Ft. Lauderdale	1%	1%	0%
Minneapolis	1%	1%	1%

* Multiple Response.

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Profile of U.S. Travelers Visiting Overseas Destinations: 2014

U.S. Resident Traveler Characteristics	All U.S. Travelers	For Vacation & VFR	For Business & Conv.
Total Number of Travelers **	**30,780,000**	**25,455,000**	**5,233,000**
International Destinations Visited:*			
Europe	**35%**	**36%**	**37%**
United Kingdom	9%	9%	10%
France	7%	7%	5%
Italy	6%	7%	4%
Germany	6%	6%	9%
Spain	4%	4%	3%
Ireland	2%	3%	2%
Netherlands	2%	2%	3%
Switzerland	2%	2%	2%
Austria	2%	2%	1%
Caribbean	**24%**	**26%**	**13%**
Dominican Republic	9%	10%	4%
Jamaica	5%	5%	2%
Bahamas	4%	4%	3%
South America	**7%**	**7%**	**8%**
Columbia	2%	2%	2%
Peru	2%	2%	1%
Central America	**8%**	**8%**	**7%**
Costa Rica	3%	3%	2%
Africa	**3%**	**3%**	**3%**

* Multiple Response.

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Profile of U.S. Travelers Visiting Overseas Destinations: 2014

U.S. Resident Traveler Characteristics	All U.S. Travelers	For Vacation & VFR	For Business & Conv.
Total Number of U.S. Travelers **	**30,780,000**	**25,455,000**	**5,233,000**
International Destinations Visited:*			
Middle East	**6%**	**5%**	**6%**
Israel	2%	2%	1%
Asia	**19%**	**17%**	**27%**
P.R. of China	4%	3%	8%
India	4%	4%	3%
Japan	3%	2%	6%
Phillipines	2%	2%	1%
Republic of Korea (South)	2%	1%	3%
Hong Kong	2%	2%	3%
Republic of China (Taiwan)	2%	2%	3%
Oceania	**2%**	**2%**	**2%**

* Multiple Response.

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Profile of U.S. Travelers Visiting Overseas Destinations: 2014

U.S. Resident Traveler Characteristics	All U.S. Travelers	For Vacation & VFR	For Business & Conv.
Total Number of U.S. Travelers **	**30,780,000**	**25,455,000**	**5,233,000**
Leisure/Recreational Activities *:			
Sightseeing	80%	82%	69%
Shopping	75%	77%	65%
Small Towns/Countryside	44%	46%	29%
Historical Locations	40%	42%	29%
Expierience Fine Dining	39%	41%	38%
Guided Tours	37%	39%	21%
Art Galleries/Museums	32%	34%	25%
Cultural/Ethnic Heritage Sights	32%	33%	24%
National Parks/Monuments	29%	31%	21%
Nightclubbing/Dancing	23%	24%	16%
Water Sports	21%	23%	9%
Concert/Play/Musical	13%	14%	10%
Amusement/Theme Parks	10%	11%	7%
Casino/Gamble	9%	10%	5%
Camping/Hiking	8%	8%	5%
Environmental/Ecological Excursions	8%	8%	5%
Sporting Event	7%	6%	7%
Golfing/Tennis	4%	4%	5%
Hunting/Fishing	4%	4%	3%
Snow Sports	1%	1%	1%

* Multiple Response.

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Profile of U.S. Travelers Visiting Overseas Destinations: 2014

U.S. Resident Traveler Characteristics	All U.S. Travelers	For Vacation & VFR	For Business & Conv.
Total Number of U.S. Travelers **	**30,780,000**	**25,455,000**	**5,233,000**
Average Total Trip Expenditures:			
Per Travel Party	$4,437	$4,326	$4,793
Per Visitor	$2,831	$2,634	$3,792
Average International Airfare:			
Per Travel Party	$2,021	$1,883	$2,522
Per Visitor	$1,347	$1,198	$2,014
Average Package Price:			
Per Travel Party	$5,978	$6,031	-
Per Visitor	$2,661	$2,674	-
Average Expenditures Outside the United States:			
Per Travel Party	$2,326	$2,358	$2,247
Per Visitor	$1,484	$1,435	$1,778
Per Visitor Per Day	$84	$88	$106
Trip Payment Method			
Purchases Using Credit Card	55%	53%	68%
Cash from Home/Travelers Checks	18%	19%	10%
Cash Adv./Wdrawal Using Credit Card	11%	11%	12%
Purchases Using Debit Card	9%	9%	5%
Cash Adv./Wdrawal Using Debit Card	7%	8%	5%

* Multiple Response.

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Profile of U.S. Travelers Visiting Overseas Destinations: 2014

U.S. Resident Traveler Characteristics	All U.S. Travelers	For Vacation & VFR	For Business & Conv.
Total Number of U.S. Travelers **	**30,780,000**	**25,455,000**	**5,233,000**
Main factor in Airline Choice:			
Airfare	31%	33%	22%
Convenient Schedule	20%	20%	22%
Non-Stop Flights	17%	18%	15%
Mile Bonus/Frequent Flyer Program	10%	9%	14%
Previous Good Experience	7%	7%	6%
Loyalty to Carrier	3%	3%	5%
Employer Policy	2%	1%	9%
Safety Reputation	2%	2%	2%
On-time Reputation	1%	1%	1%
In-Flight Service Reputation	1%	1%	1%
Type of Airline Ticket*:			
Paid Ticket	82%	82%	87%
Frequent Flyer Award Ticket	6%	7%	3%
Paid Upgrade	3%	2%	4%
Non-revenue	3%	3%	2%
Discount/Group Fare	2%	2%	2%
Frequent Flyer Upgrade	1%	1%	2%
Don't Know	7%	7%	5%
Seating Area on Flight:			
Economy/Tourist/Coach	78%	80%	64%
Premium Economy	14%	13%	19%
Executive/Business Class	6%	4%	13%
First Class	3%	3%	4%

* Multiple Response.

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Profile of U.S. Travelers Visiting Overseas Destinations: 2014

U.S. Resident Traveler Characteristics	All U.S. Travelers	For Vacation & VFR	For Business & Conv.
Total Number of U.S. Travelers **	**30,780,000**	**25,455,000**	**5,233,000**
Gender and Age of Traveler:			
Male Adults	50%	45%	69%
Female Adults	51%	55%	31%
Average Age of Male (years)	45.4	45.6	45.8
Average Age of Female (years)	44.0	44.7	42.7
Occupation:			
Mgmt., Business, Science, & Arts	42%	40%	66%
Retired	15%	17%	2%
Service Occupations	11%	11%	8%
Student	10%	10%	3%
Sales and Office	7%	7%	8%
Homemaker	5%	6%	2%
Military/Government	3%	3%	2%
Nat. Res., Const., & Maintenance	3%	2%	3%
Prod., Trans., & Material Moving	3%	2%	3%
Annual Household Income:			
Average	$123,283	$119,354	$157,268
Median	$100,000	$95,000	$120,000

* Multiple Response.

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Profile of U.S. Travelers Visiting Overseas Destinations: 2014

U.S. Resident Traveler Characteristics	All U.S. Travelers	For Vacation & VFR	For Business & Conv.
**Total Number of U.S. Travelers ** **	**30,780,000**	**25,455,000**	**5,233,000**
Ethnicity			
Hispanic	14.7%	14.6%	13.4%
Non-Hispanic	85.3%	85.4%	86.6%
Race*			
American Indian/Alaskan Native	1.8%	1.6%	2.5%
Asian	16.2%	17.1%	13.3%
Hawaiian/Pacific Islander	1.0%	0.9%	0.8%
Black	7.6%	7.7%	6.6%
White	76.4%	75.8%	79.4%
Health Care Pre-Trip (Vaccinations, etc)			
Yes	12.2%	11.2%	10.3%
No	87.8%	88.8%	89.7%
Travel Insurance Purchased			
Yes	28.1%	29.8%	14.1%
No	71.9%	70.2%	85.9%

* Multiple Response.

** NOTE: Percentages listed in this profile can be converted into estimated numbers by multiplying the percentage by 30,780,000 (total U.S. Residents visiting overseas destinations), to yield 25,455,000 (82.7% Vacation/Holiday & Visit Friends/Relatives) and 5,233,000 (17.0% Business/Convention). Rounded percentages were listed for all categories reported by 1% or more of the respondents and may not sum to 100%.

Source: U.S. Department of Commerce, ITA, National Travel & Tourism Office, "Survey of International Air Travelers," July 2015.

Survey of International Air Travelers: Table Number and Description

TABLE 1 - Q3a. Where do you live (State/City of Residence)?** (%)
TABLE 2 - Q6a. How did you obtain the information used for planning this trip?** (%)
TABLE 3 - Q7a. How many days prior to departure did you make the decision to travel? (%)
TABLE 4 - Q7b. How many days prior to departure did you make air travel reservations? (%)
TABLE 5 - Q9. How were airline reservations made for this trip?** (%)
TABLE 6 - Q10a. How far in advance was payment made for your international air tickets? (%)
TABLE 7 - Q8a. Did you visit a health care provider to receive vaccinations or medication specifically for this trip? (%)
TABLE 8 - Q8b. How many days in advance of this trip did you visit a health care provider? (%)
TABLE 9 - Q18a./b. Is this trip part of a prepaid, inclusive tour package?** (%)
TABLE 10 - Q12a./b. Before you left home, did you make reservations for lodging, if so, how?** (%)
TABLE 11 - Q11. Was travel insurance purchased for this trip? (%)
TABLE 12 - Q14. With whom are you traveling now?** (%)
TABLE 13 - Q15. Including yourself, how many adults and/or children are in your travel party? (%)
TABLE 14 - Q13a. What is the main purpose of your trip? (%)
TABLE 15 - Q13a./b. All purpose(s) of trip.*** (%)
TABLE 16 - Q17. Type of accommodation outside the U.S. and number of nights stayed.** (%)
TABLE 17 - Q16b. How many nights outside of the U.S.A. will you spend on this trip? (%)
TABLE 18 - Q16c. How many total nights away from home will you spend on this trip? (%)
TABLE 19 - Q30a. Is this your first trip by air from the United States? (%)
TABLE 20 - Q30b. How many round trips by air have you made from the U.S. in the past 12 months? (%)
TABLE 21 - Q3b./Q17. Number of countries visited.** (%)
TABLE 22 - Q3b./Q17. Number of destinations visited.** (%)
TABLE 23 - Q21. What types of transportation will be used on this trip?** (%)
TABLE 24 - Q5a. What city or airport will you pass through U.S. Customs and Passport Control (Port of Entry)** (%)
TABLE 25 - Q3b. What will be your main destination on this trip? (%)
TABLE 26 - Q3b./Q17. What international destinations will you visit (includes main destination)?** %)
TABLE 27 - Q22. Will anyone engage in any of the following leisure activities?** (%)
TABLE 28 - Q18d./Q19. How much total money will be spent outside the U.S.? ($)
TABLE 29 - Q20. Expenses Payment Methods.** (%)
TABLE 30 - Q20. Travelers Use of Payment Methods.*** (%)
TABLE 31 - Q20. Share of Total Trip Expenditures by Payment Methods.**** (%)
TABLE 32 - Q25. What were your three main reasons for flying on thie airline?** (%)
TABLE 33 - Q25. What was the most important reason for flying on this airline? (%)
TABLE 34 - Q26a. Where will you sit in the aircraft today? (%)
TABLE 35 - Q26b. What type of airline ticket do you have?** (%)
TABLE 36 - Q31bc. What is your age and what is your gender? (%)
TABLE 37 - Q31a. What is your occupation? (%)
TABLE 38 - Q32. What is your total combined annual household income? (%)
TABLE 39 - Q33a. What is your ethnicity? (%)
TABLE 40 - Q33b. What is your race?** (%)

Interested in obtaining data for your organization?

One of the unique features of the Survey program is its 'data-mining' potential. The Survey research data, collected from the questionnaire, is maintained in a computer database. Therefore, customized reports, special tables and data files are available.

To learn more, go to: http://travel.trade.gov/research/programs/ifs/index.html

For NTTO programs of interest visit:

http://travel.trade.gov/research/index.html

- Summary of International Travel to the United States (I-94)
- U.S. International Air Traveler Statistics (APIS, formerly I-92)
- Survey of International Air Travelers (SIAT)
- Canadian Statistics
- Forecast of International Arrivals to the United States
- U.S. Travel and Tourism Exports, Imports and the Balance of Trade
- U.S. Travel and Tourism Satellite Accounts

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