

Positioning and potentials of Greenland on the SCANDINAVIAN market

Report on the results of the surveys in DK, SE, NO



June 28, 2018
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Introduction and background of this study

- » Visit Greenland and Air Greenland have 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 SCANDINAVIAN travel market”.
- » The central aim is to get a thorough and complete picture on the volume, the structure, the attitudes and images of the market potential of Greenland in Denmark, Sweden and Norway, in order to provide a sound basis for the future strategic planning of Greenland concerning its marketing efforts, product development and communication on these markets.
- » A total of 6,000 interviews were conducted; 2,000 in each of the countries Denmark, Sweden and Norway. The results are representative for the population in Denmark, Sweden and Norway aged 18-75 years.
- » All interviews were conducted by our partner NORSTAT in March 2018, based on their online access panels in Denmark, Sweden and Norway.
- » The study in Scandinavia followed the same methodological approach as in the studies 2016 in Germany, Great Britain and USA and 2017 in France, using the same questionnaire (plus selected additional questions), in order to be able to compare the results of the markets.
- » The report focusses on the results in Scandinavia (by weighting the country results according to their population size), but also shows detailed comparisons between Denmark, Sweden and Norway in order to give the reader the full picture regarding all three markets at one glance in one report.



Previous studies following the same methodology

- » The results of the previous studies conducted during the years 2016 and 2017 in the markets Germany, UK, USA and France have been covered in three reports.
- » The first report, taking the NATA perspective is dealing with the potentials of the three NATA destinations in the German market. This report has been published on the NATA website:
http://www.northatlantic-islands.com/fileadmin/documents/NIT_NATA_Report_DE2016_final.pdf
- » The second report, taking the perspective of Visit Greenland and Air Greenland is dealing with the potentials of Greenland in Germany, UK and USA. This report has been published on the Greenland Tourism Statistics website:
<http://tourismstat.gl/resources/reports/da/r14/NIT%20full%20report%202016%20DE%20UK%20USA.pdf>
- » The third report, taking the perspective of Visit Greenland and Air Greenland is dealing with the potentials of Greenland in France. This report has been published on the Greenland Tourism Statistics website:
http://tourismstat.gl/resources/reports/en/r16/NIT_VG_Report2017_FRANCE.pdf





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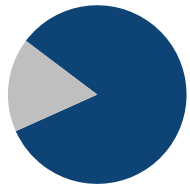
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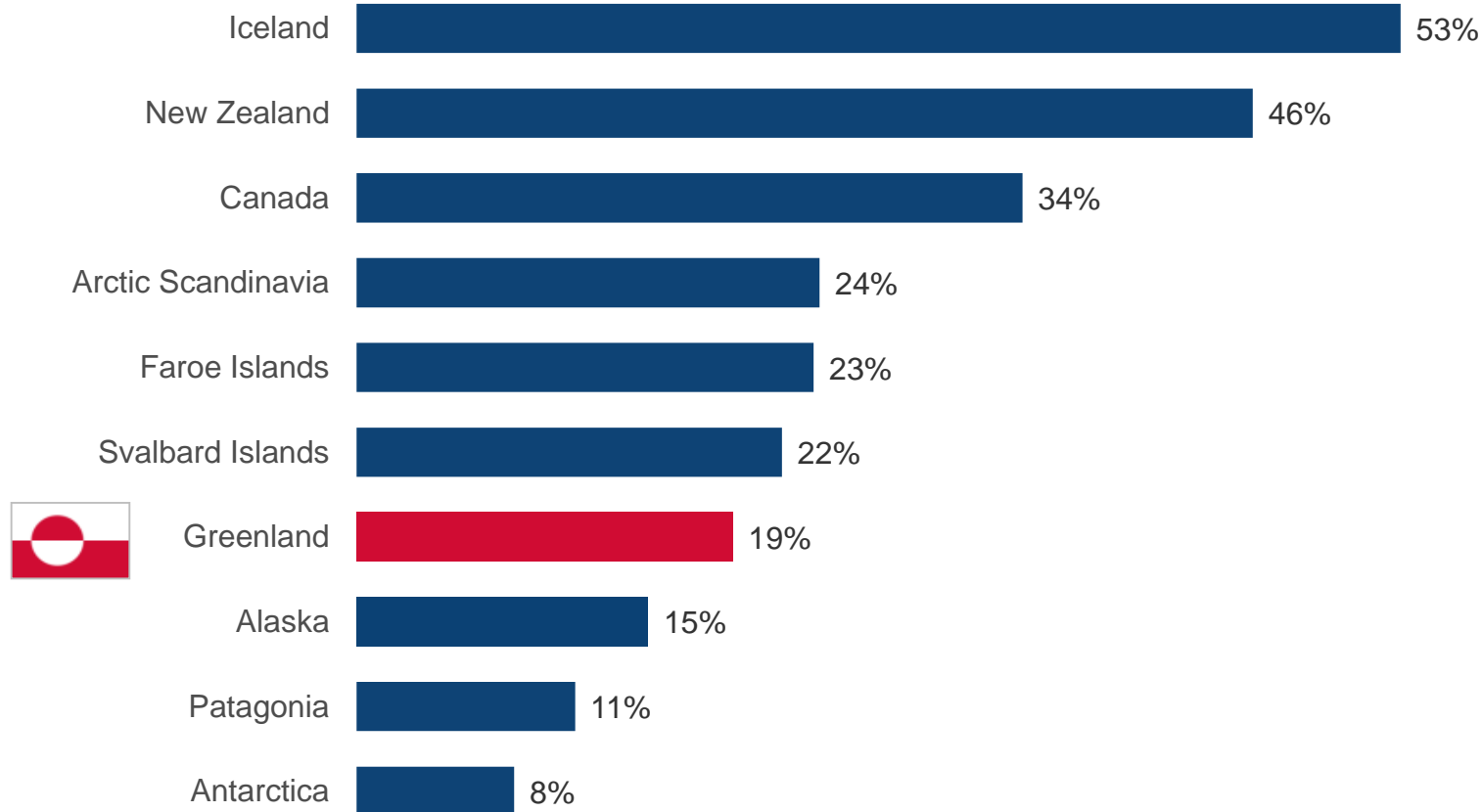


1. Interest/experience to travel to remote destinations

General interest to travel to remote destinations in the Scandinavian population



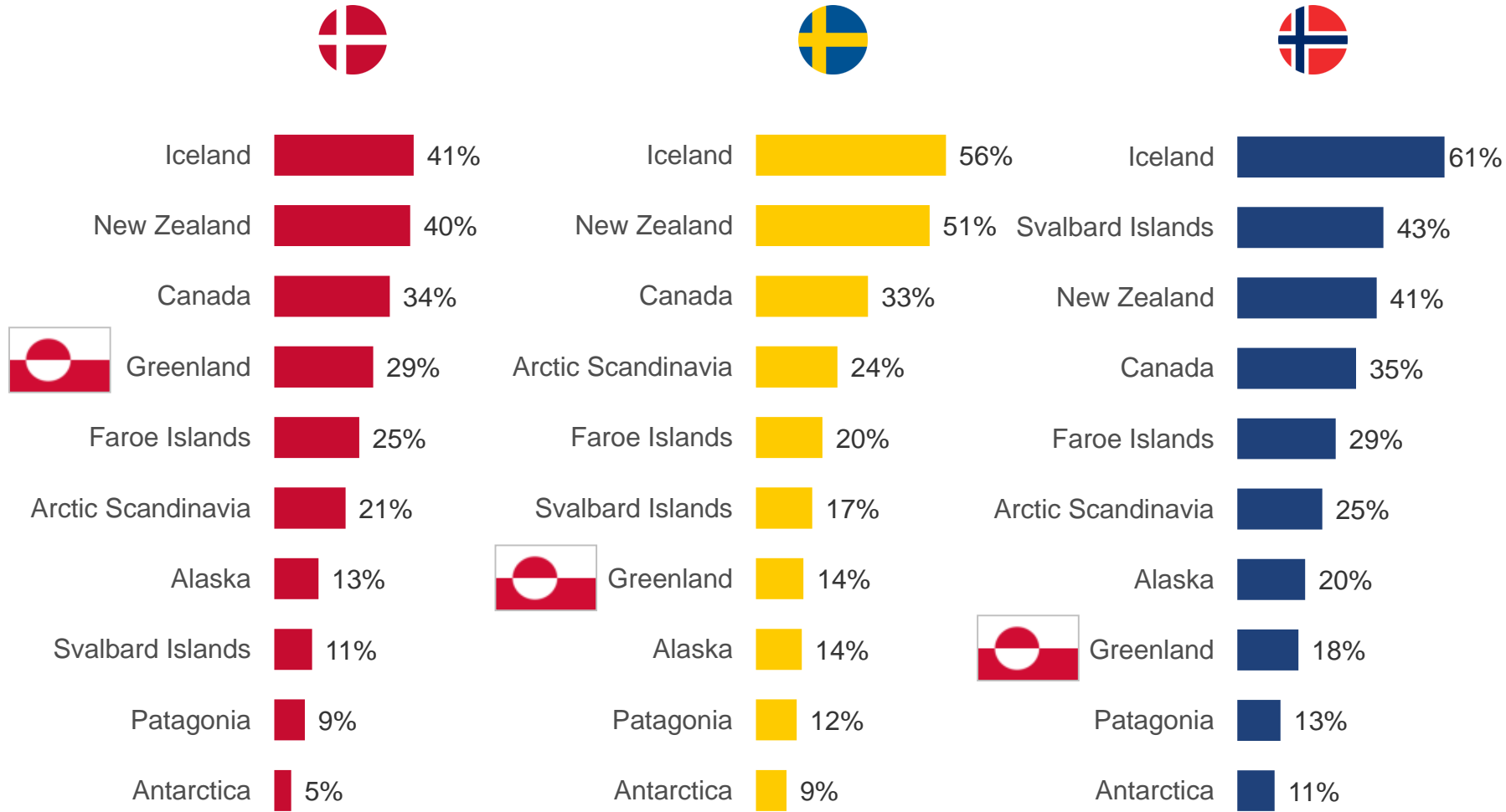
83% of the Scandinavian population would like to go to at least one of these 10 remote destinations in the next 5 years



- » To identify the “general” potential of Greenland and competitive remote destinations, we asked “Which of these destinations would you like to visit within the next 5 years?”
- » 83% of the Scandinavian population would like to go to at least one of these 10 remote destinations in the next 5 years.
- » Iceland is the most popular destination in terms of general interest, New Zealand, Canada and Arctic Scandinavia follow.
- » 19% would like to go to Greenland.

Q2a: Now we are talking about remote travel destinations. Which of these destinations would you like to visit within the next 5 years?
Basis: All respondents in Scandinavia (DK, SE, NO) (n=6,000);
Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

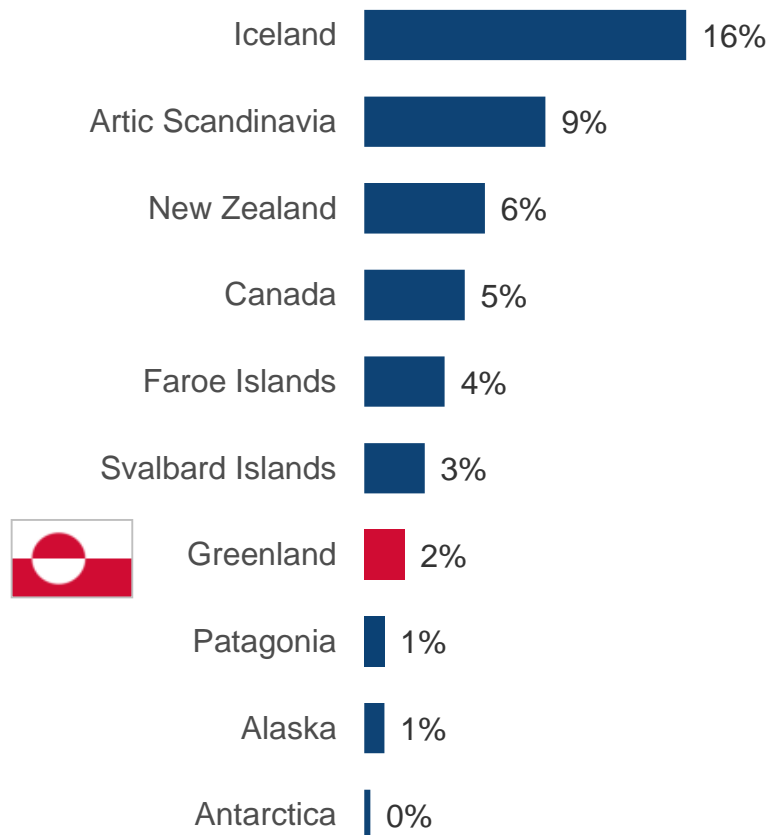
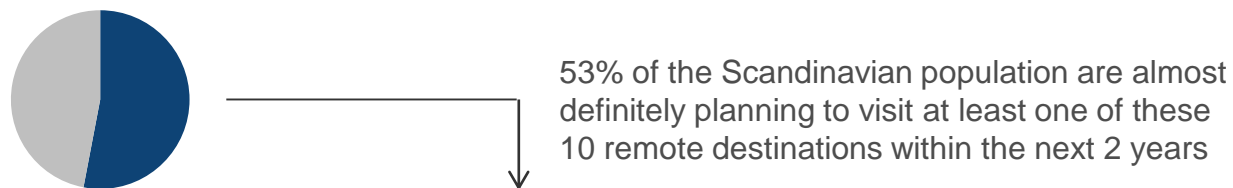
General interest to travel to remote destinations in Denmark, Sweden and Norway



- » There are similarities but also differences between Denmark, Sweden and Norway.
- » In all countries Iceland is the most popular destination, also New Zealand and Canada rank very high.
- » The share of people interested to travel to Greenland varies between 14% in Sweden, 18% in Norway and 29% in Denmark.
- » It is obvious that there is a certain preference for remote destinations with a special connection in each market:
- » Denmark: Greenland, Faroe Islands
- » Norway: Svalbard Islands
- » Sweden: Arctic Scandinavia

Q2a: Now we are talking about remote travel destinations. Which of these destinations would you like to visit within the next 5 years?
 Basis: All respondents in Denmark (n=2000), Sweden (n=2000), Norway (n=2000); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

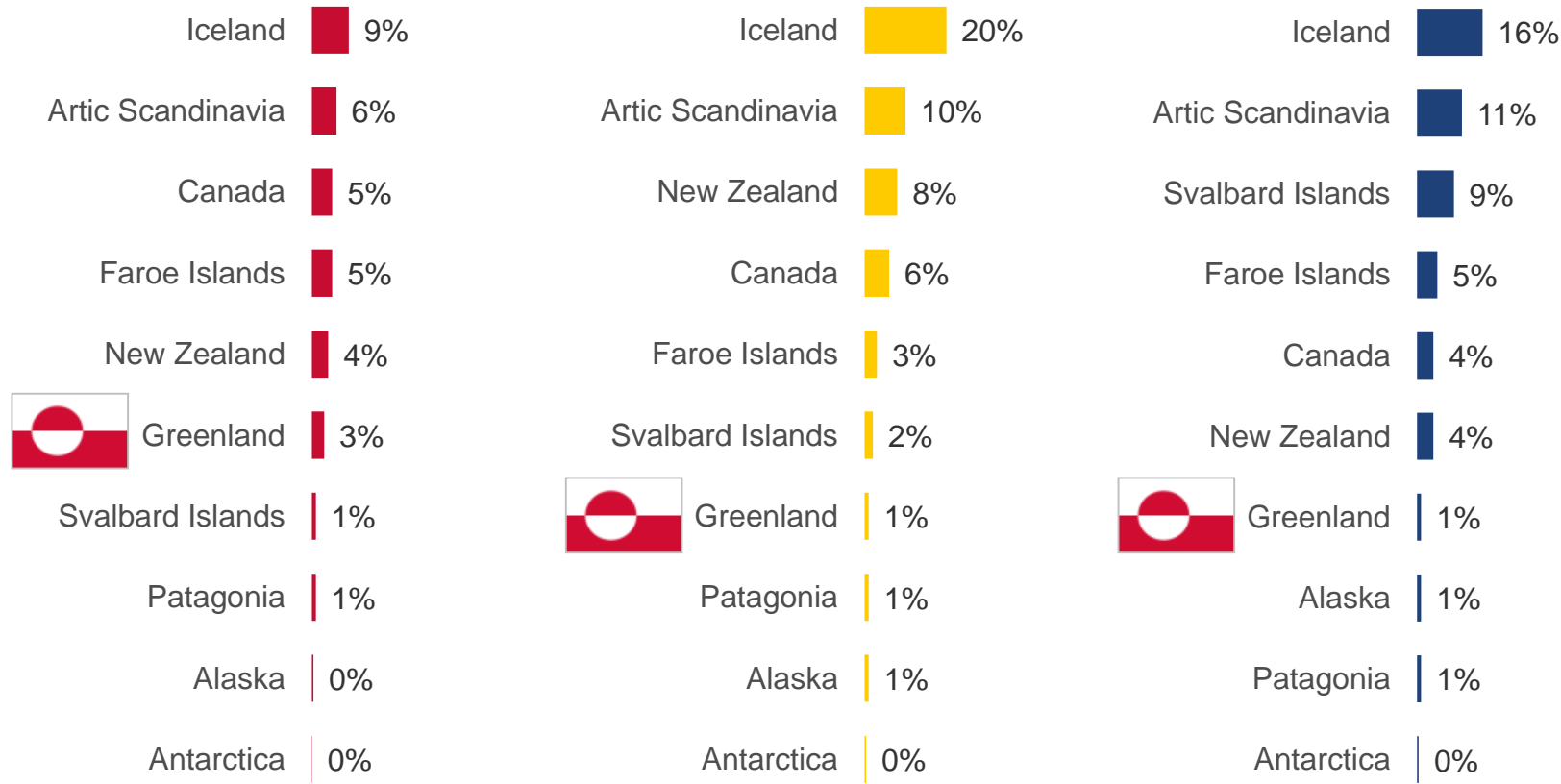
“Hard potential” to travel to remote destinations in the Scandinavian population



- » To identify the “hard” potential of Greenland and competitive remote destinations, and to put the general potential into perspective, we asked “Which of these destinations are you almost definitely planning to visit within the next 2 years?”
- » 53% of the Scandinavian population are almost definitely planning to visit at least one of these 10 remote destinations within the next 2 years.
- » Iceland is the most popular destination in terms of this “hard potential”, Arctic Scandinavia, New Zealand and Canada follow.
- » 2% are almost definitely planning to visit Greenland.

Q2b: And which of these travel destinations are you almost definitely planning to visit within the next 2 years?
Basis: All respondents in Scandinavia (DK, SE, NO) (n=6,000);
Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

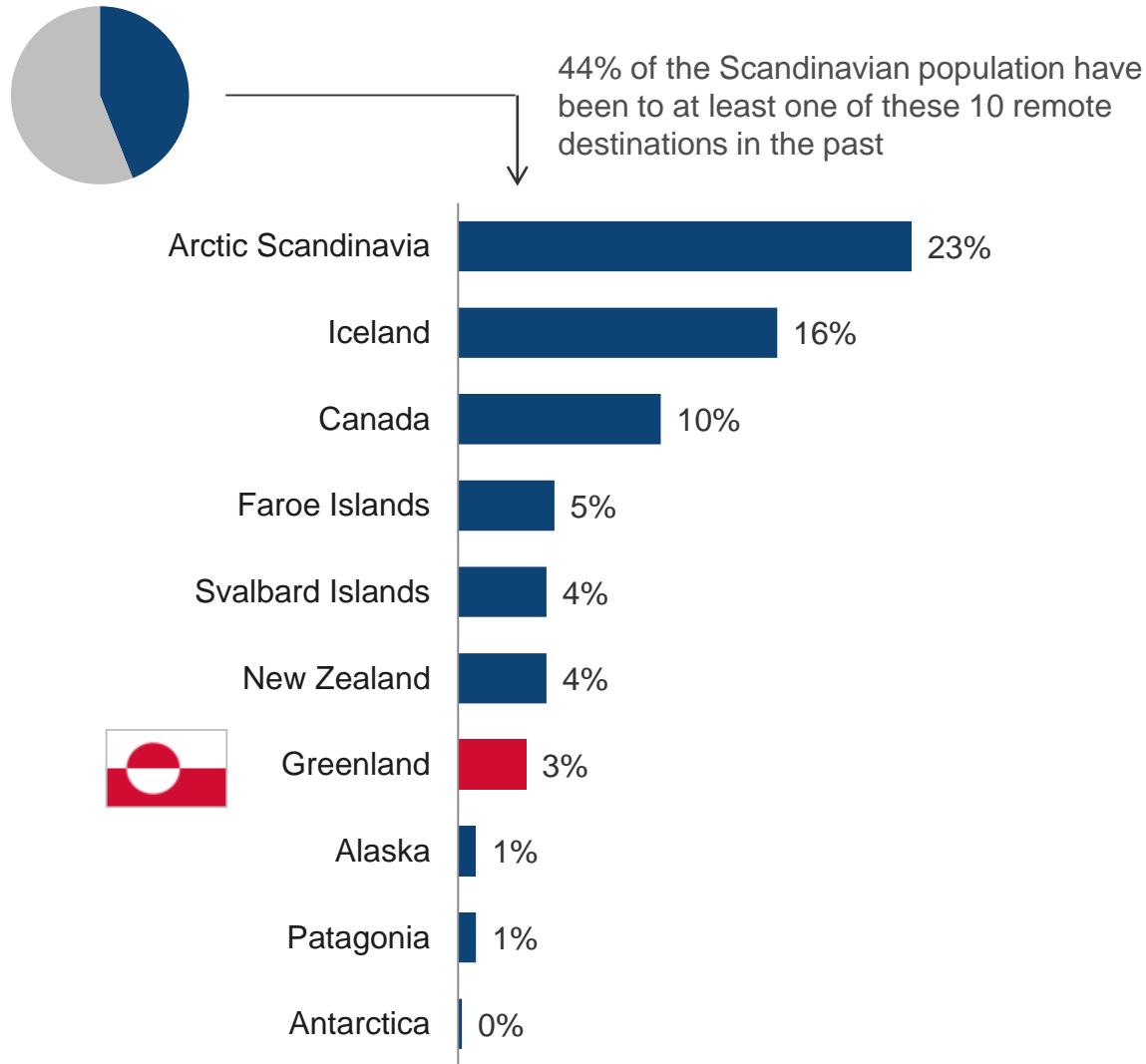
“Hard potential” to travel to remote destinations in Denmark, Sweden and Norway



- » There are similarities but also differences between Denmark, Sweden and Norway regarding the “hard potential” to travel to remote destinations; in all markets Iceland is the most popular destination in front of Arctic Scandinavia.
- » The share of people almost definitely planning to travel to Greenland varies between 3% in Denmark and 1% in the other markets.
- » The “special connections” between each market and specific destinations that was observed in the total interest to travel there is less obvious with the “hard potential”.

Q2b: And which of these travel destinations are you almost definitely planning to visit within the next 2 years?
 Basis: All respondents in Denmark (n=2000), Sweden (n=2000), Norway (n=2000); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

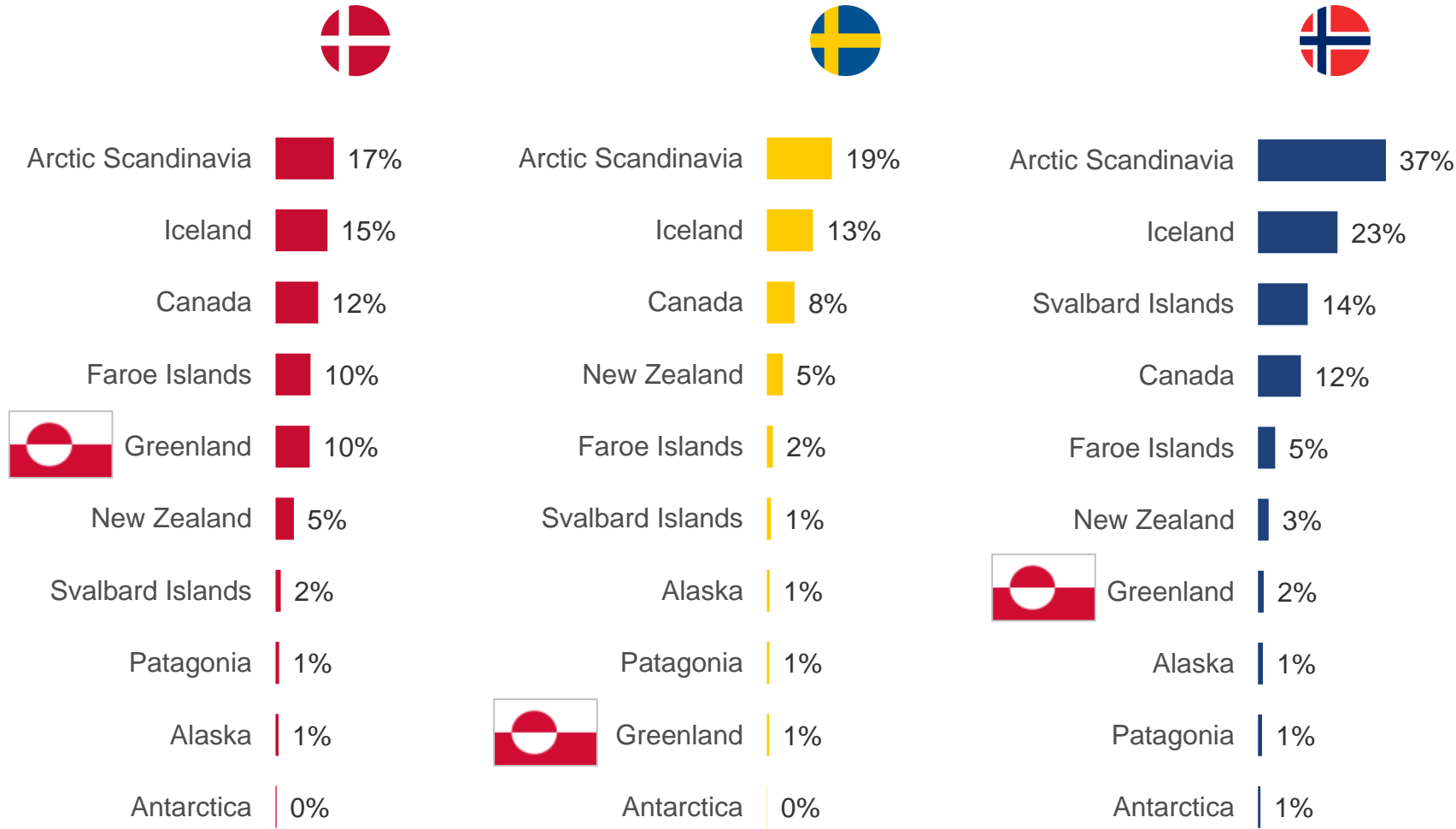
Travel experience to remote destinations in the Scandinavian population



- » To identify the actual all time travellers to Greenland and competitive remote destinations, and to put the general potential into perspective, we asked “Which of these destinations have you already visited for a holiday in the past?”
- » 44% of the Scandinavian population have been to at least one of these 10 remote destinations at least once in their life.
- » Arctic Scandinavia is the most popular destination in terms of actual experience: 23% of the Scandinavians have been there.
- » Iceland and Canada follow with 16% resp. 10% of the Scandinavians with all time experiences.
- » Faroe Island, Svalbard Islands, New Zealand and Greenland show similar low experience rates between 3% and 5%.

Q2c: And which of these destinations have you already visited for a holiday in the past?
Basis: All respondents in Scandinavia (DK, SE, NO) (n=6,000);
Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

Travel experience to remote destinations in Denmark, Sweden and Norway



- » There are similarities but also differences between Denmark, Sweden and Norway.
- » In all countries Arctic Scandinavia is the most visited destination, followed quite closely by Iceland.
- » The share of people having been to Greenland varies between 10% in Denmark, 2% in Norway and 1% in Sweden.
- » It is obvious that there is a certain preference for remote destinations with a special connection in each market:
- » Denmark: Greenland, Faroe Islands (Playing in one league with Canada!)
- » Norway: Svalbard Islands

Q2c: And which of these destinations have you already visited for a holiday in the past?
 Basis: All respondents in Denmark (n=2000), Sweden (n=2000), Norway (n=2000); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

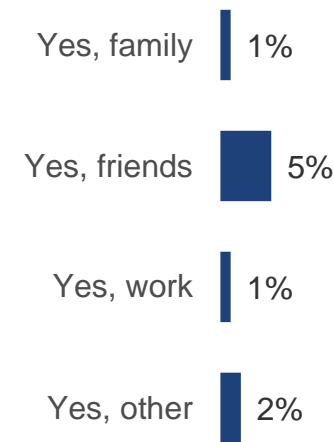
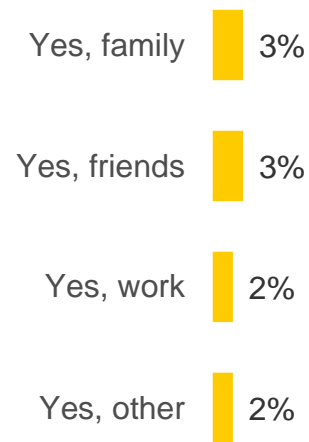
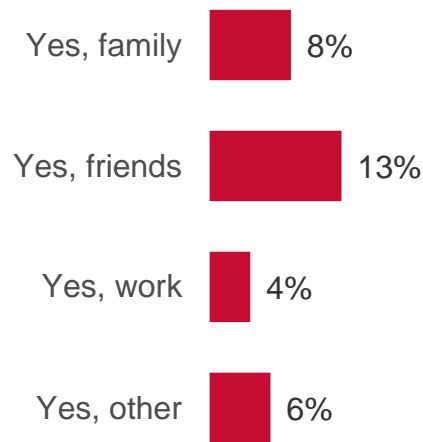
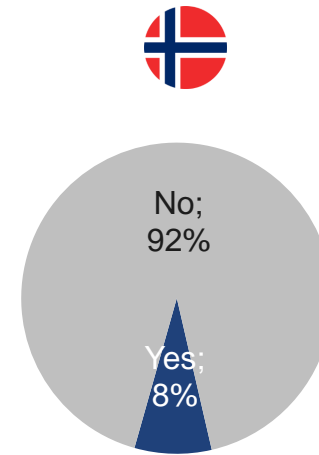
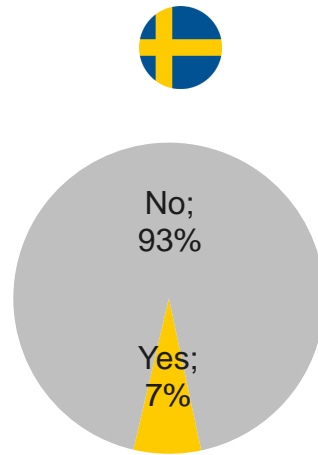
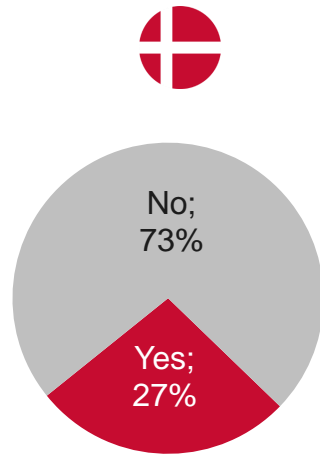
Volume extrapolations of actual and potential travellers to Greenland in Scandinavia total and the three individual markets

FUNNEL	Definition	SCANDINAVIA			
 total potential	“like to travel to Greenland within the next 5 years”	2.85 million	1,200,000	1,000,000	650,000
 ‘harder’ potential	total potential, without reasons against travelling to Greenland	420,000	130,000	160,000	130,000
 ‘hard’ potential/planners	“almost definitely planning to visit Greenland within the next 2 years”	245,000	110,000	100,000	35,000
 visitors	Plane and cruise passengers to Greenland in 2017	32,378 plane*: 31,676 cruise**: 702	29,725 plane*: 29,259 cruise**: 488	1,301 plane*: 1,240 cruise**: 61	1,330 plane*: 1,177 cruise**: 153

- » The volume funnel puts the reported market shares in relation to the actual market size and delivers concrete volume figures.
- » It shows that Denmark is despite its comparatively small population the biggest market for Greenland in Scandinavia in front of Sweden with its much bigger population.
- » The hard potential and the actual visitors provide with you a baseline to estimate what future volumes of guests to expect from each of the markets.
- » Based on this, Denmark will stay by far the premier market for Greenland in Scandinavia but Sweden and Norway are also interesting.

Basis: All respondents in Scandinavia (DK, SE, NO) (n=6,000), in Denmark (n=2000), Sweden (n=2000), Norway (n=2000); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

Personal ties to Greenland within the potential travellers to Greenland in Denmark, Sweden and Norway



- » This questions covers the personal ties to Greenland of the potential travellers to Greenland.
- » When looking at the Scandinavia results in total and at the findings in Denmark, Sweden and Norway in detail, it is important to know the differences between the three markets.
- » In Denmark, 27% of the potential travellers to Greenland have personal connections to Greenland.
- » This figure is much lower in the other two markets.
- » A lot of the differences in results between the three markets can be explained (at least partly) with this factor.

Q: Do you have any personal ties/connections to Greenland?
 Basis: Potential travellers to Greenland from Denmark (n=576), Sweden (n=282) and Norway (n=352);
 Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

To learn 1: Interest/experience to travel to remote destinations

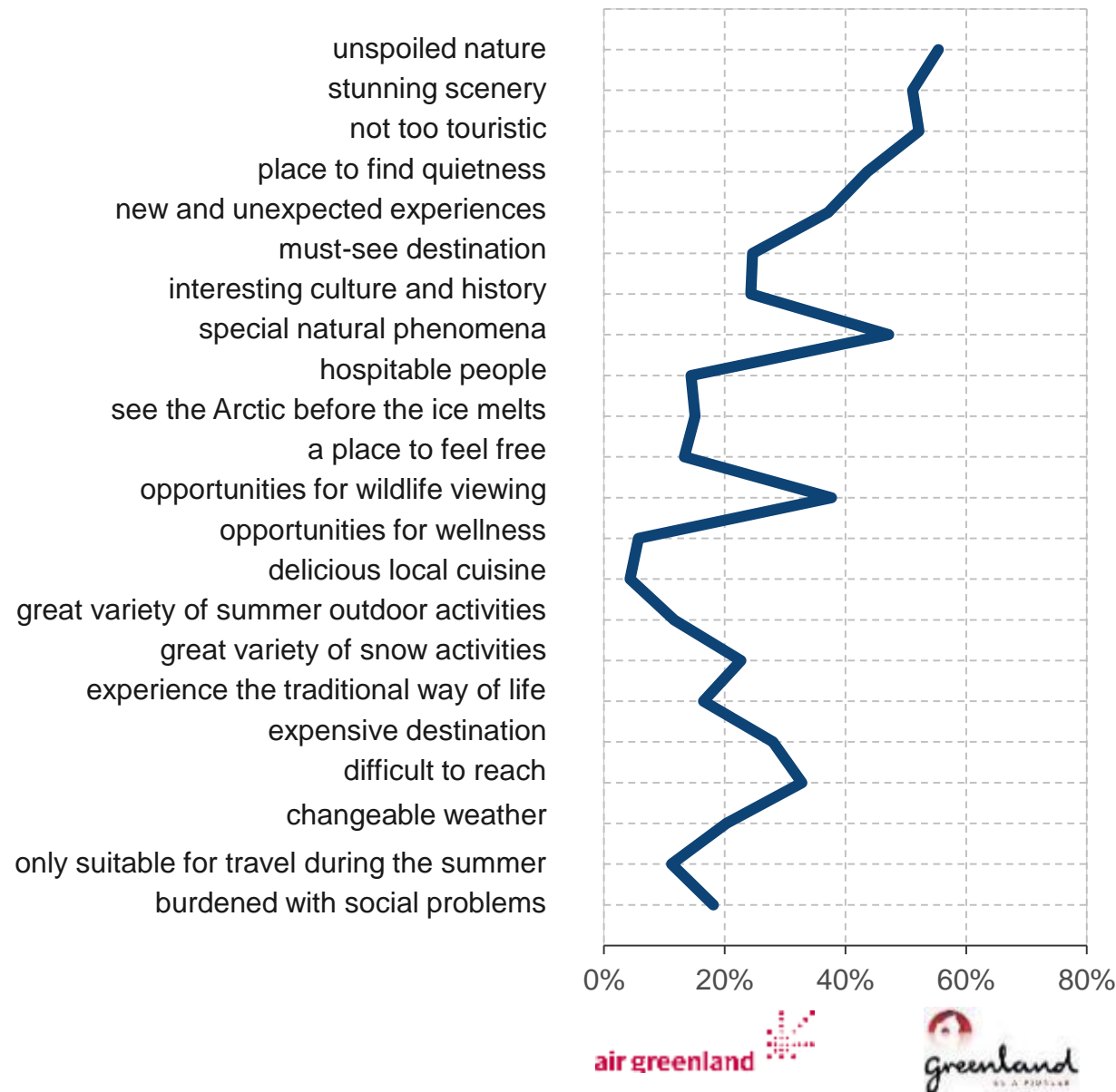
- » 83% of the Scandinavian population would like to go to at least one of these 10 remote destinations in the next 5 years. 53% are almost definitely planning to go to at least one of these destinations in the next 2 years. 44% have been to at least one of these destinations at least once in their life.
- » Iceland is the most popular destination in terms of general interest, New Zealand, Canada and Arctic Scandinavia follow.
- » Iceland is also the most popular destination in terms of this “hard potential”, Arctic Scandinavia, New Zealand and Canada follow.
- » Arctic Scandinavia is the most popular destination in terms of actual experience, followed by Iceland and Canada.
- » It is obvious that there is a certain preference for remote destinations with a special connection in each market:
 - » Denmark: Greenland, Faroe Islands
 - » Norway: Svalbard Islands
 - » Sweden: Arctic Scandinavia
- » 19% of the Scandinavians would like to go to Greenland, 2% are almost definitely planning to go there and 3% have been there in the past.
- » There are big differences between Denmark, Sweden and Norway:
 - » The share of people interested to travel to Greenland varies between 14% in Sweden, 18% in Norway and 29% in Denmark.
 - » The share of people almost definitely planning to travel to Greenland varies between 3% in Denmark and 1% in the other markets
 - » The share of people having been to Greenland varies between 10% in Denmark and 1-2% in the other markets
- » This makes Denmark the biggest market in Scandinavia for Greenland in front of Sweden with its much bigger population.
- » The reason for this is (at least partly) the strong personal ties that a lot of the Danes have with Greenland, be it family, friends, work or other.

- » Compared with the actual demand, there is a huge interest to travel to Greenland in Scandinavia. This is where destination marketing comes in. The following part of the report should help with strategic marketing decisions.
- » Already this first chapter of the report shows that despite their similarities, the three markets Denmark, Sweden and Norway have their own characteristics – so it seems advisable to treat them as individual markets rather than one Scandinavian market, when possible.
- » Chapter 7 of this report shows more detailed analyses about the competitive situation of Greenland in Scandinavia.



2. Image of Greenland as a holiday destination

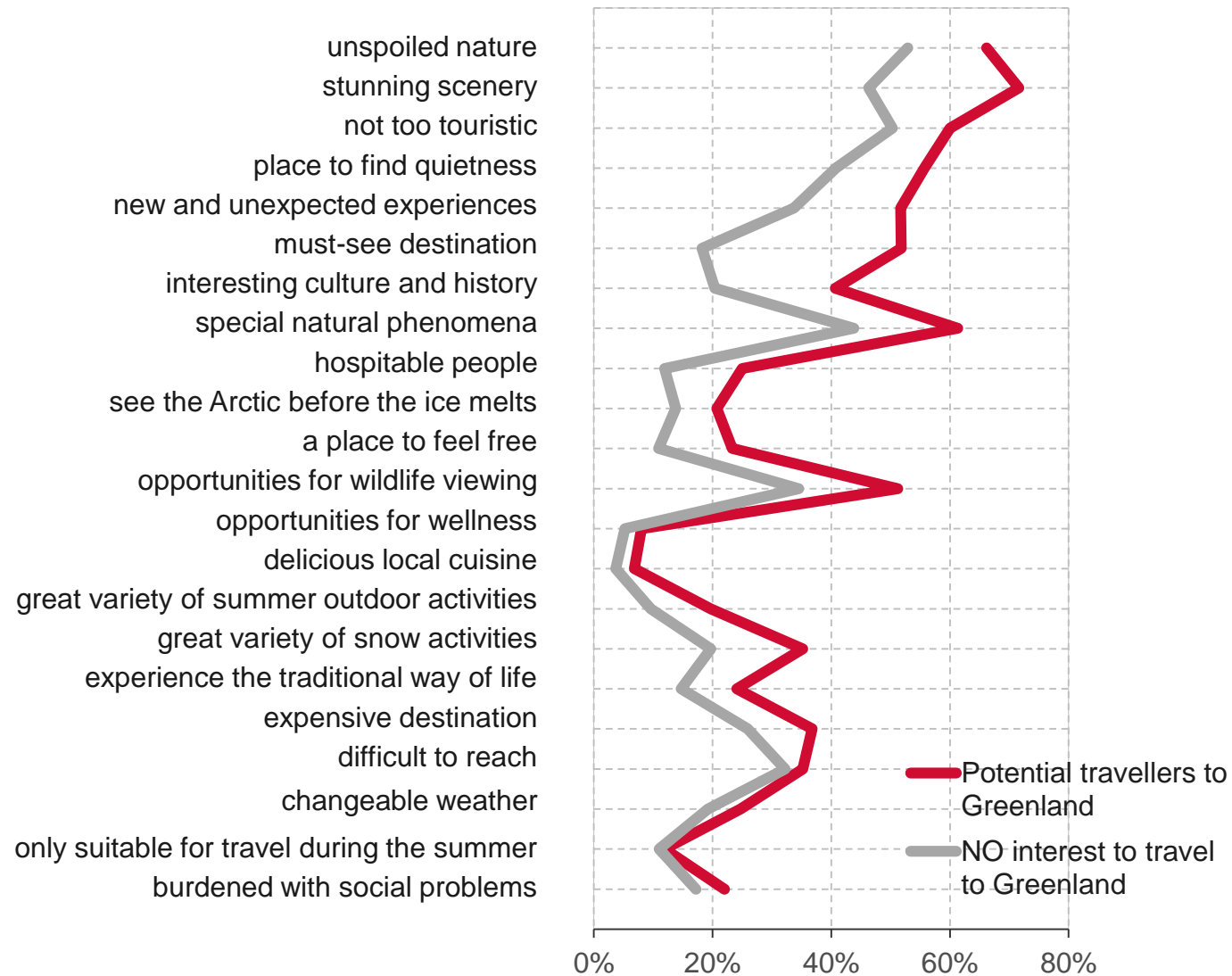
Image of Greenland in the Scandinavian population



- » The **key image factors** of Greenland in the Scandinavian population are:
 - » Unspoiled nature (55%)
 - » Not too touristic (52%)
 - » Stunning scenery (51%)
 - » Natural phenomena (47%)
 - » A place to find quietness (44%)
- » Greenland is **not famous** for:
 - » Delicious local cuisine (4%)
 - » Opportunities for wellness (6%)
 - » Only suitable for travelling in the summer (11%)
- » Persons in Scandinavia name on average 6.0 of the 21 characteristics in the question.

Q3: Please tell me which of these characteristics do you think particularly apply to Greenland?
 Basis: All respondents in Scandinavia (DK, SE, NO) (n=6,000);
 Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

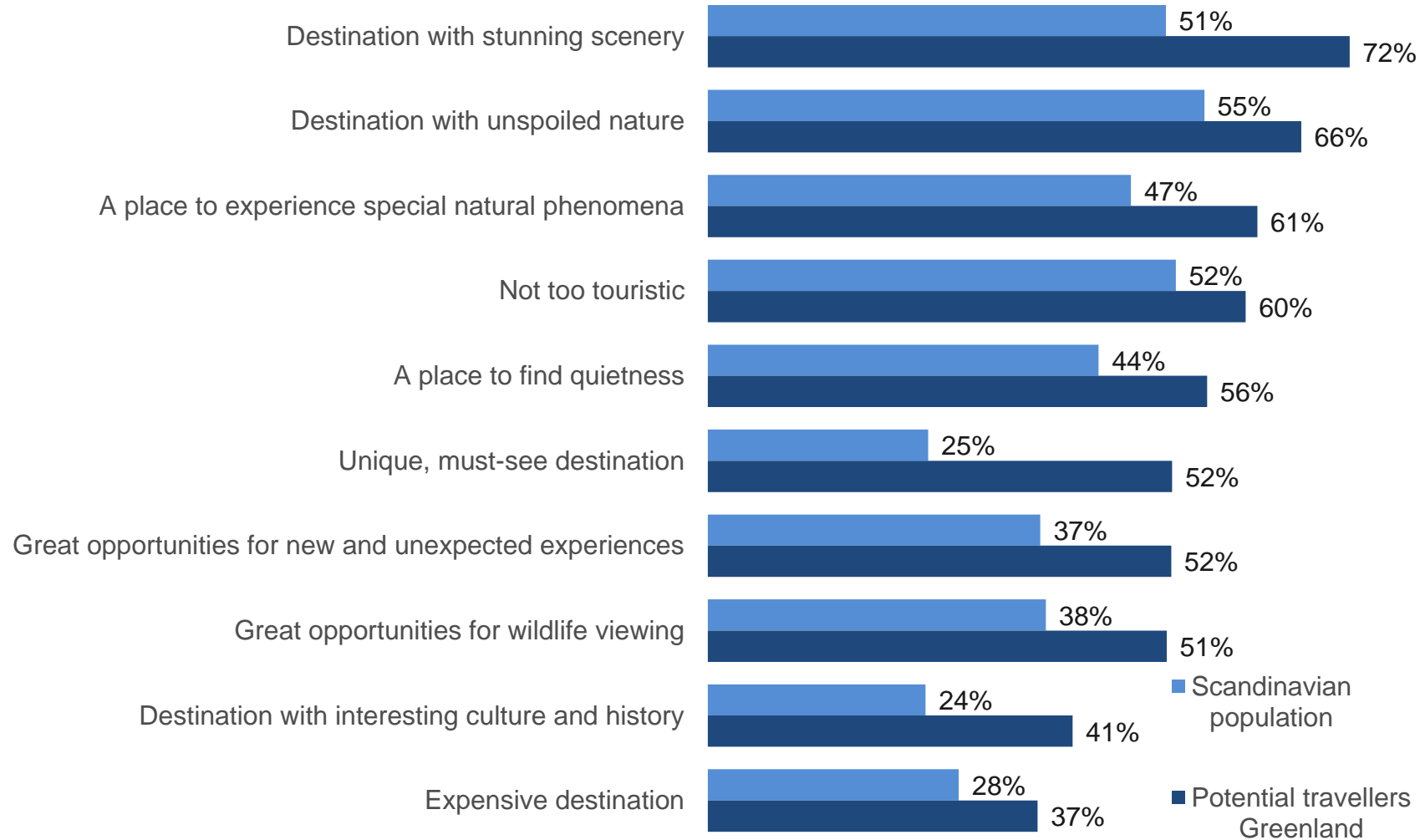
Image of Greenland in the Scandinavian population: With/without interest to travel to Greenland



- » The **most striking differences** of persons WITH compared to persons WITHOUT interest to travel to Greenland can be found here:
 - » Must-see destination (+34%-pts.)
 - » Stunning scenery (+25%-pts.)
 - » Interesting culture/history (+20%-pts.)
 - » New & unexpected (+18%-pts.)
 - » Natural phenomena (+18%-pts.)
- » There is no characteristic, where the persons with NO interest in Greenland show higher figures.
- » Persons with interest to travel to Greenland name on average 8.1 of the 21 characteristics in the question. Persons with NO interest name 5.5 characteristics.
- » The image profiles in both groups run quite parallel with higher figures for the potential Greenland guests.

Q3: Please tell me which of these characteristics do you think particularly apply to Greenland?
 Basis: Respondents in Scandinavia (DK, SE, NO) WITH interest to travel to Greenland (n=1,147) and WITHOUT interest to travel to Greenland (n=4,854); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

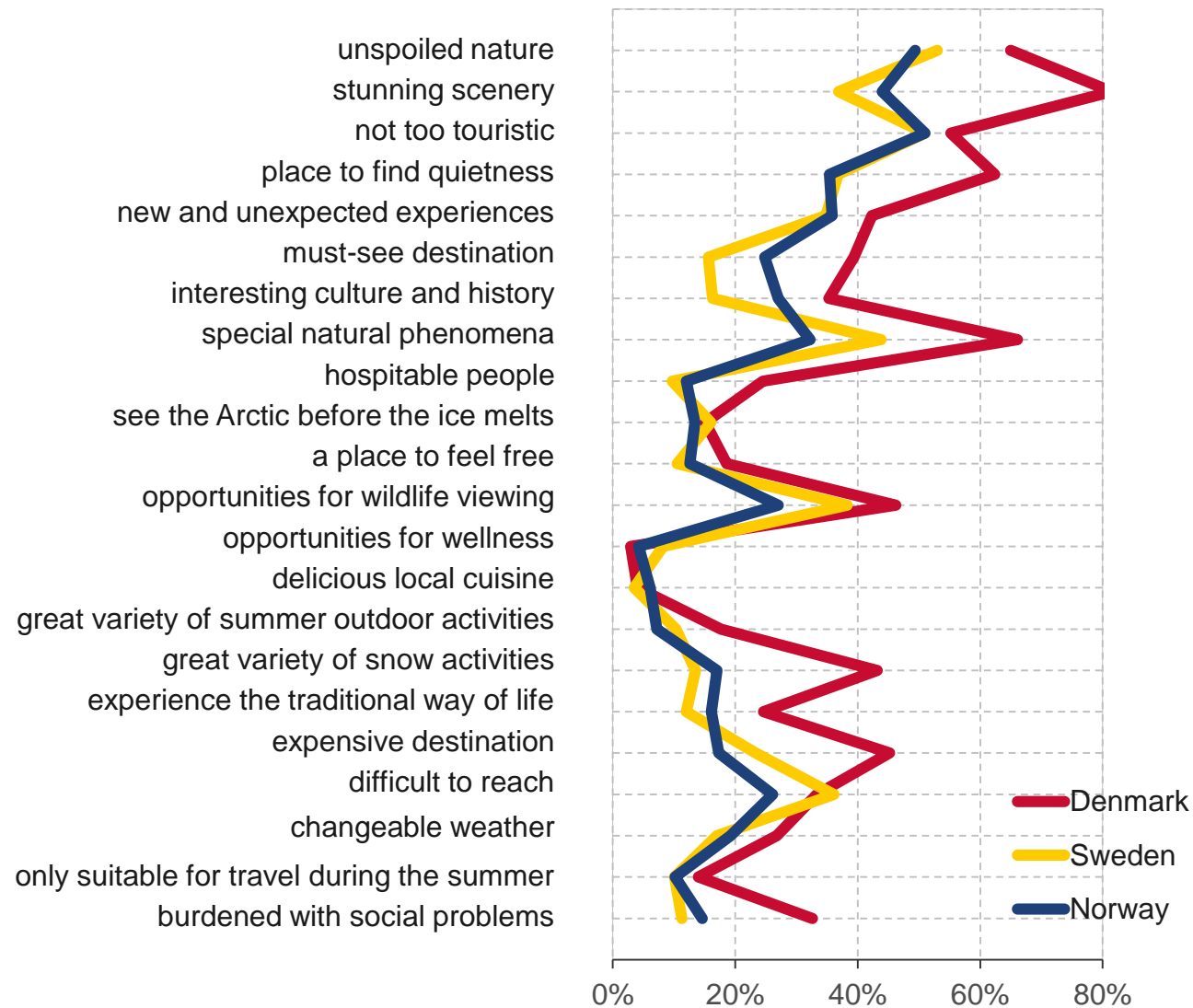
Image of Greenland in Scandinavia: TOP10



- » This overview shows the **TOP10 image characteristics** of Greenland as a holiday destination on the Scandinavian market.
- » The ranking is based on the results of the potential travellers to Greenland.
- » The key image factors of Greenland with its potential guests are:
 - » Stunning scenery
 - » Unspoiled nature
 - » Natural phenomena
 - » Not too touristic
 - » A place to find quietness

Q3: Please tell me which of these characteristics do you think particularly apply to Greenland?
 Basis: All respondents in Scandinavia (DK, SE, NO) (n=6,000); Potential travellers to Greenland from Scandinavia (DK, SE, NO)(n=1,147), Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

Image of Greenland in Denmark, Sweden and Norway

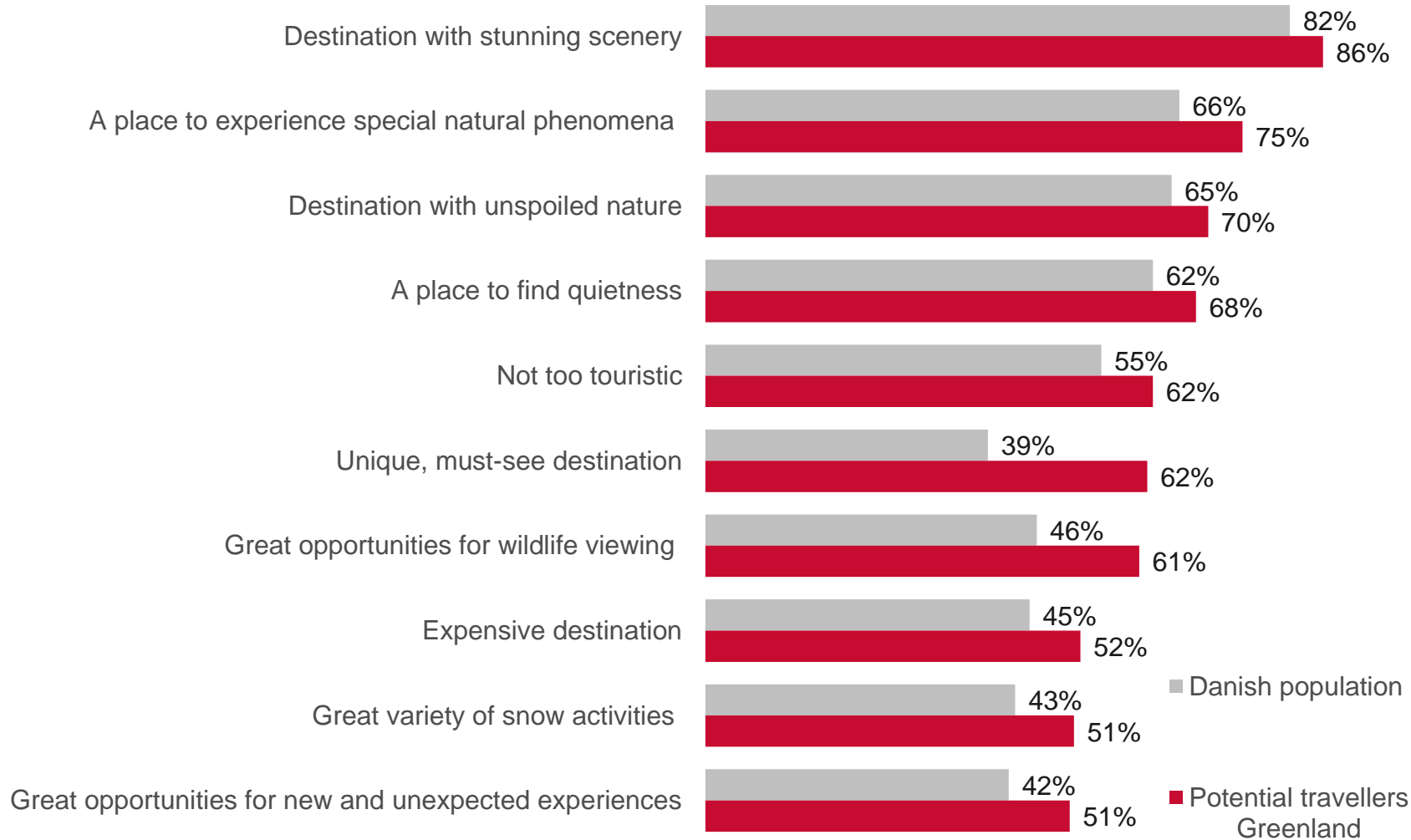


- » In almost all characteristics, the Denmark figures are high above those of Sweden and Norway.
- » The ranking is similar in all three markets.
- » More characteristic with the Danish than the Swedish are:
 - » Stunning scenery (+45%-pts.)
 - » Snow activities (+30%-pts.)
 - » Quietness (+26%-pts.)
- » More characteristic with the Danish than the Norwegians are:
 - » Stunning scenery (+38%-pts.)
 - » Special phenomena (+34%-pts.)
 - » Expensive (+28%-pts.)
- » The images in Sweden and Norway are quite similar with each other.
- » Slightly more characteristic with the Swedish are natural phenomena, wildlife viewing, difficult to reach; more characteristic with the Norwegians are culture/history and stunning scenery.

Q3: Please tell me which of these characteristics do you think particularly apply to Greenland?

Basis: All respondents in Denmark (n=2000), Sweden (n=2000), Norway (n=2000); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

Image of Greenland in Denmark: TOP10

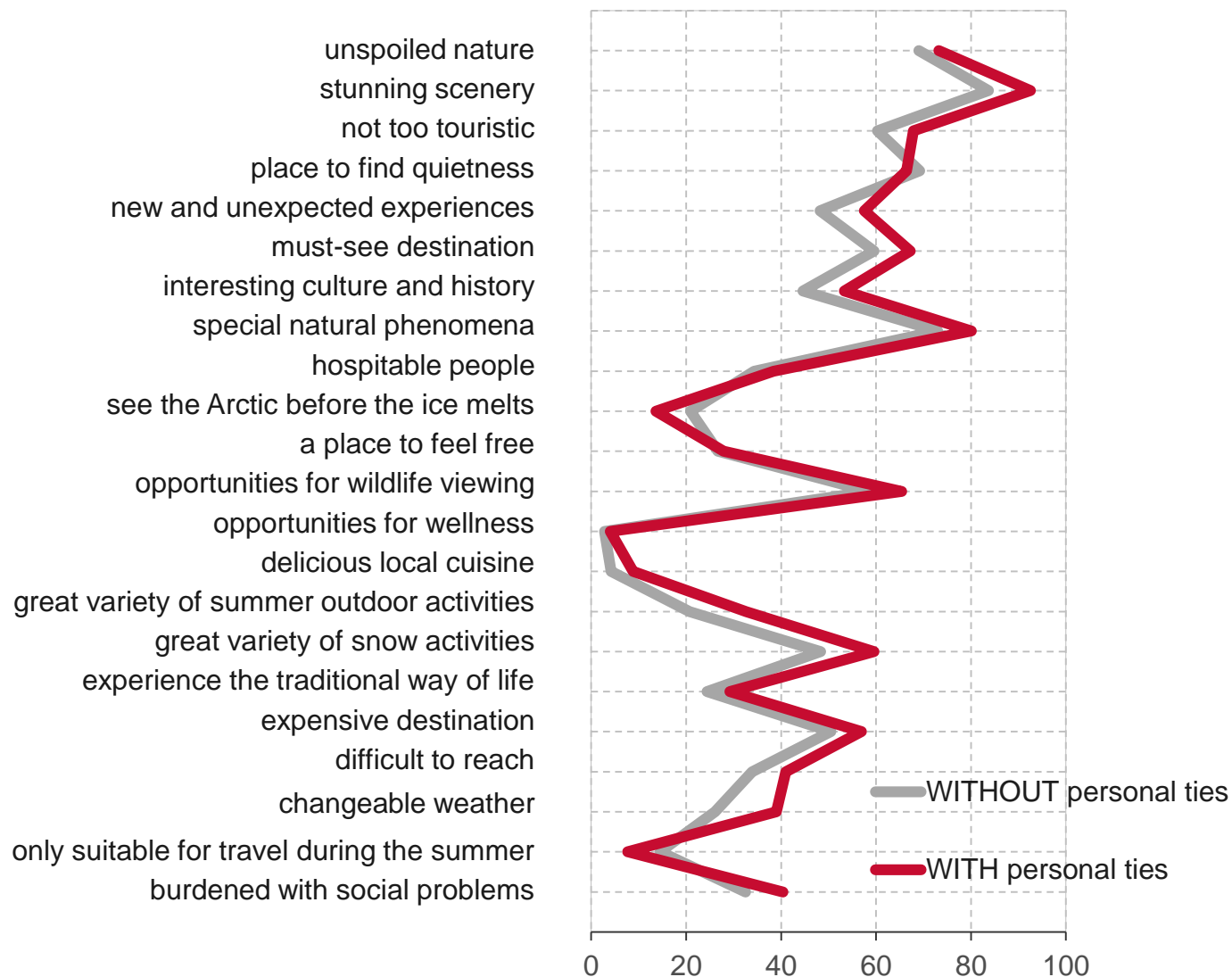


- » This overview shows the **TOP10 image characteristics** of Greenland as a holiday destination on the DANISH market.
- » The ranking is based on the results of the potential travellers to Greenland in Denmark.
- » The key image factors of Greenland with its potential guests in Denmark are:
 - » Stunning scenery
 - » Natural phenomena
 - » Unspoiled nature
 - » A place to find quietness
 - » Not too touristic

Q3: Please tell me which of these characteristics do you think particularly apply to Greenland?
 Basis: All respondents in Denmark (n=2,000); Potential travellers to Greenland from Denmark (n=576); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat



Image of Greenland in Denmark: Potential travellers to Greenland WITH/WITHOUT personal ties to Greenland

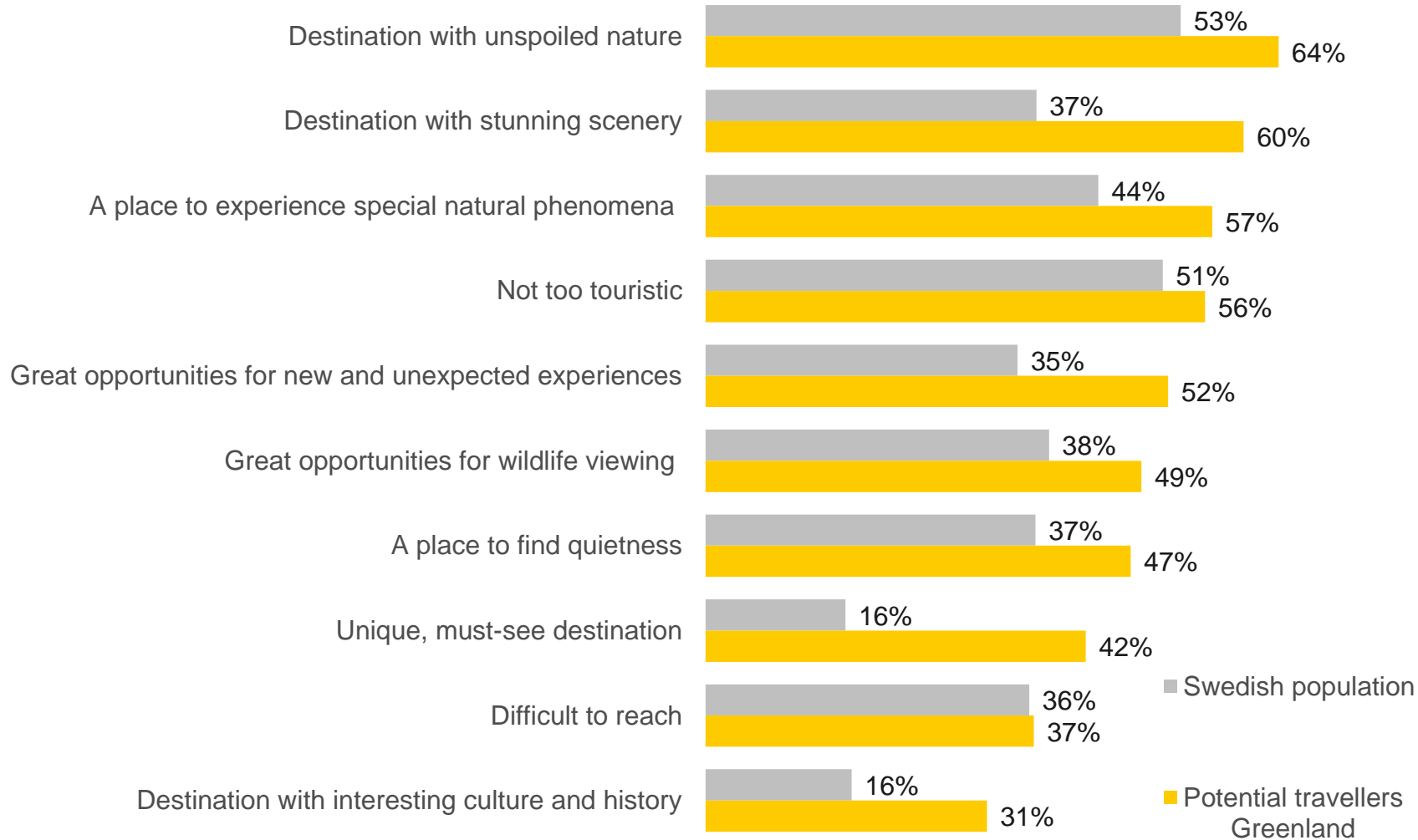


- » The **most striking differences** of persons WITH compared to persons WITHOUT personal ties to Greenland can be found here:
 - » Changeable weather (+13%-pts.)
 - » Summer activities (+12%-pts.)
 - » Snow activities (+11%-pts.)
- » They see more the tourism potentials of Greenland as well as the challenging aspects, such as changeable weather but also social problems (+8%-pts.)
- » The only aspects that persons WITHOUT personal ties name more are seeing the Arctic before the ice melts and only suitable in the summer
- » Persons with WITH personal ties name on average 10.2 of the 21 characteristics in the question. Persons with without personal ties name 9.1 characteristics.
- » The image profiles in both groups run quite parallel.

Q3: Please tell me which of these characteristics do you think particularly apply to Greenland?

Basis: Potential travellers to Greenland from Denmark WITH personal ties to Greenland (n=156) and WITHOUT (n=420); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

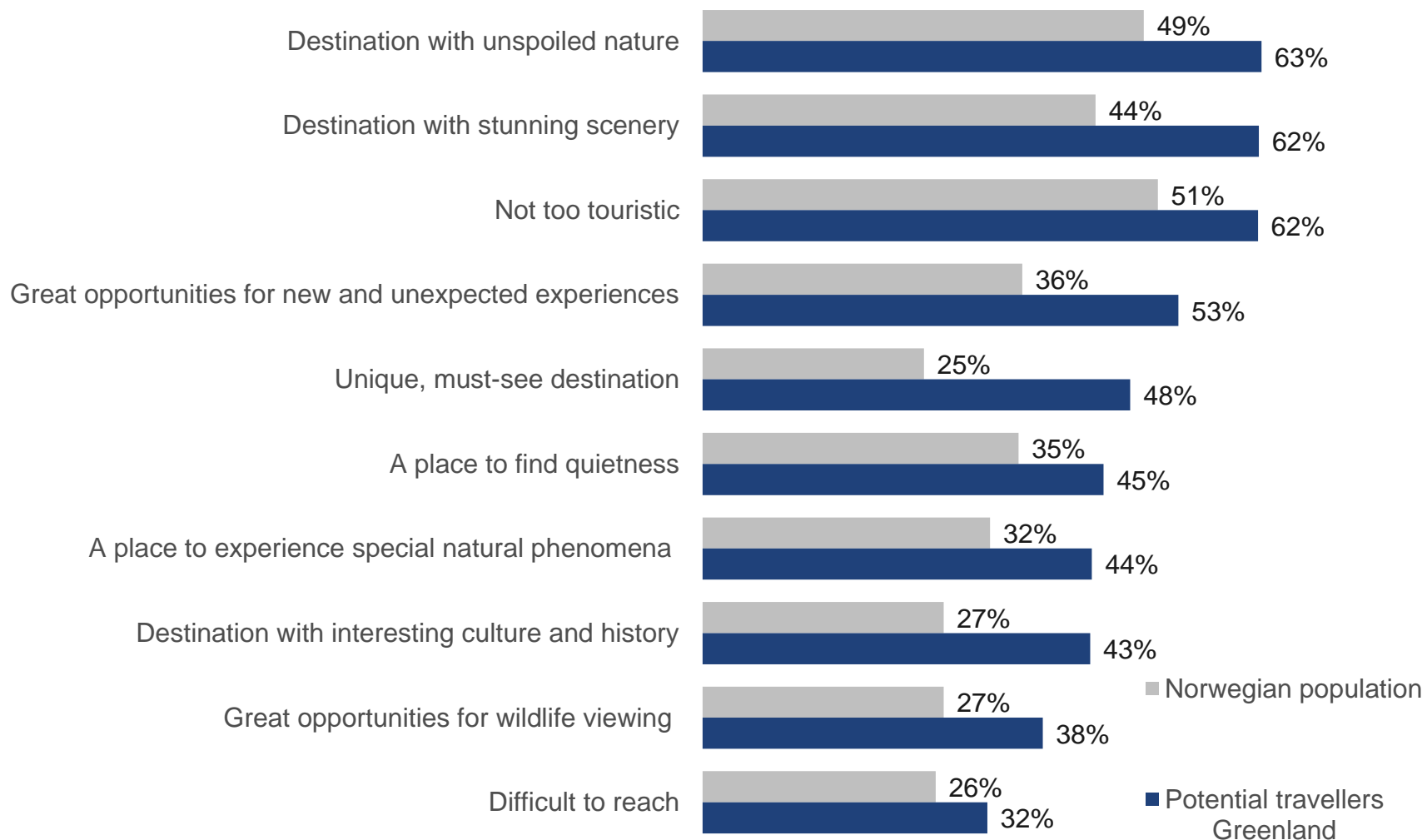
Image of Greenland in Sweden: TOP10



- » This overview shows the **TOP10 image characteristics** of Greenland as a holiday destination on the SWEDISH market.
- » The ranking is based on the results of the potential travellers to Greenland in Sweden.
- » The key image factors of Greenland with its potential guests in Sweden are:
 - » Unspoiled nature
 - » Stunning scenery
 - » Natural phenomena
 - » Not too touristic
 - » New/unexpected experiences

Q3: Please tell me which of these characteristics do you think particularly apply to Greenland?
 Basis: All respondents in Sweden (n=2,000); Potential travellers to Greenland from Sweden (n=282); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

Image of Greenland in Norway: TOP10



- » This overview shows the **TOP10 image characteristics** of Greenland as a holiday destination on the NORWEGIAN market.
- » The ranking is based on the results of the potential travellers to Greenland in Norway.
- » The key image factors of Greenland with its potential guests in Norway are:
 - » Unspoiled nature
 - » Stunning scenery
 - » Not too touristic
 - » New/unexpected experiences
 - » Unique, must-see destination

Q3: Please tell me which of these characteristics do you think particularly apply to Greenland?
 Basis: All respondents in Norway (n=2,000); Potential travellers to Greenland from Norway (n=352); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

To learn 2: Image of Greenland on the Scandinavian market

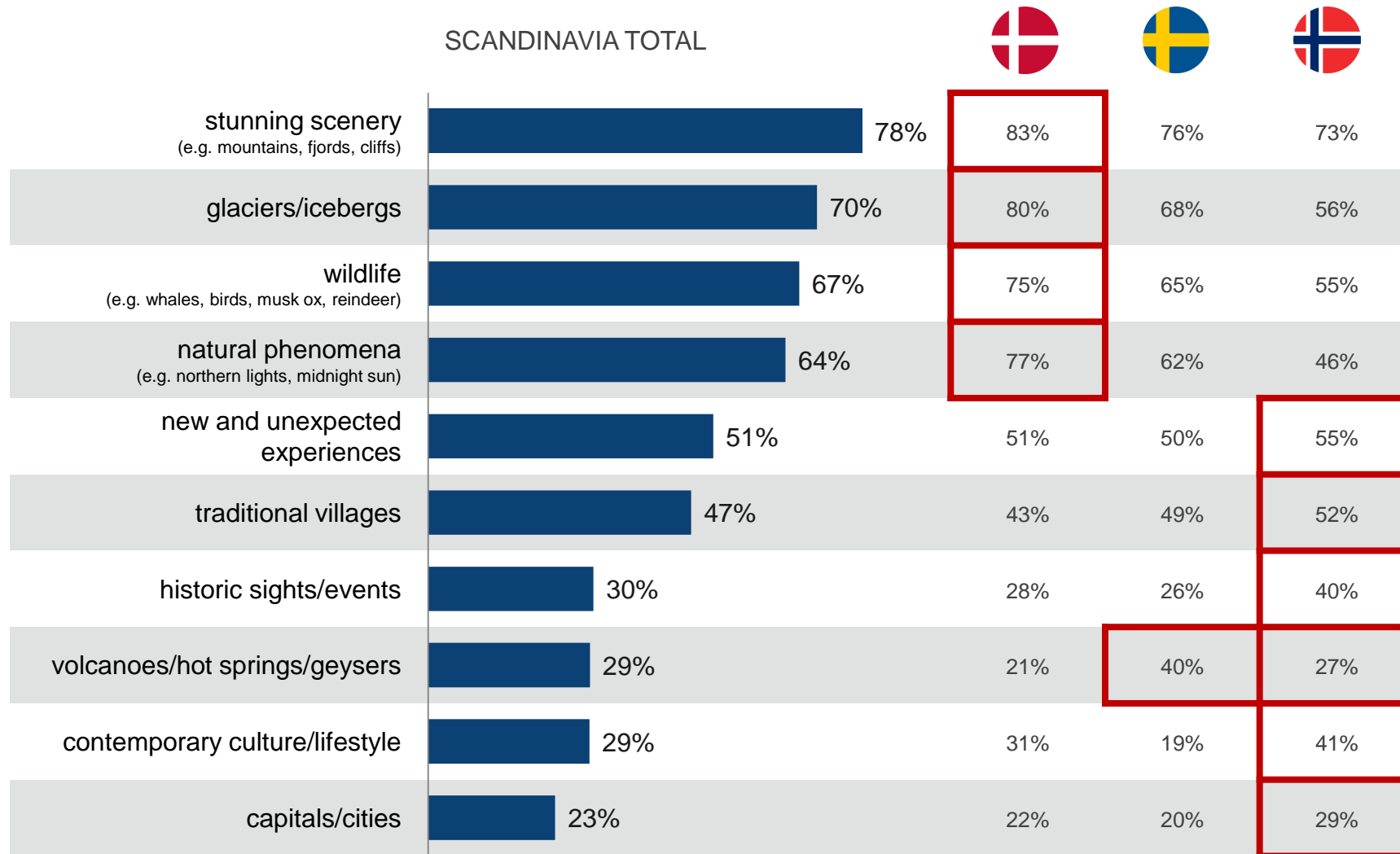
- » The key image factors of Greenland in Scandinavian population are: Unspoiled nature, not too touristic, stunning scenery, natural phenomena, a place to find quietness.
- » Greenland is not famous for its delicious local cuisine, opportunities for wellness and being only suitable for travelling in the summer.
- » Persons in Scandinavia name on average 6.0 of the 21 characteristics in the question.
- » When comparing persons WITH and WITHOUT interest to travel to Greenland we see that the potential guests to Greenland consider Greenland much more to be a must-see destination, to have a stunning scenery and interesting culture/history and to give you new & unexpected experiences. Persons with interest to travel to Greenland name on average 8.1 of the 21 characteristics in the question. Persons with NO interest name 5.5 characteristics.
- » When comparing the three Scandinavian markets you see that on the one hand the ranking is similar in all three markets, on the other hand in almost all characteristics, the Denmark figures are high above those of Sweden and Norway.
- » More characteristic with the Danish than the Swedish are stunning scenery , snow activities, and a place to find quietness.
- » More characteristic with the Danish than the Norwegians are stunning scenery, special phenomena and Greenland being an expensive destination.
- » When comparing Sweden and Norway, slightly more characteristic with the Swedish are natural phenomena, wildlife viewing, difficult to reach; more characteristic with the Norwegians are culture/history and stunning scenery.
- » In Denmark it makes sense to differentiate the potential travellers into those WITH and WITHOUT personal ties to Greenland. Then you observe, that in the very knowledgeable group with personal ties, they see at the same time more the tourism potentials of Greenland without turning a blind eye on the challenging aspects, such as changeable weather and also social problems in Greenland.

- » The results about the image of Greenland in Scandinavia give you a clear picture of how Greenland is perceived as a holiday destination in this market. They also clearly show what potential travellers expect and what not.
- » Again, the differentiation between Denmark, Sweden and Norway show that it makes sense to look at these markets individually.



3. Product preferences of potential travellers when travelling to Greenland

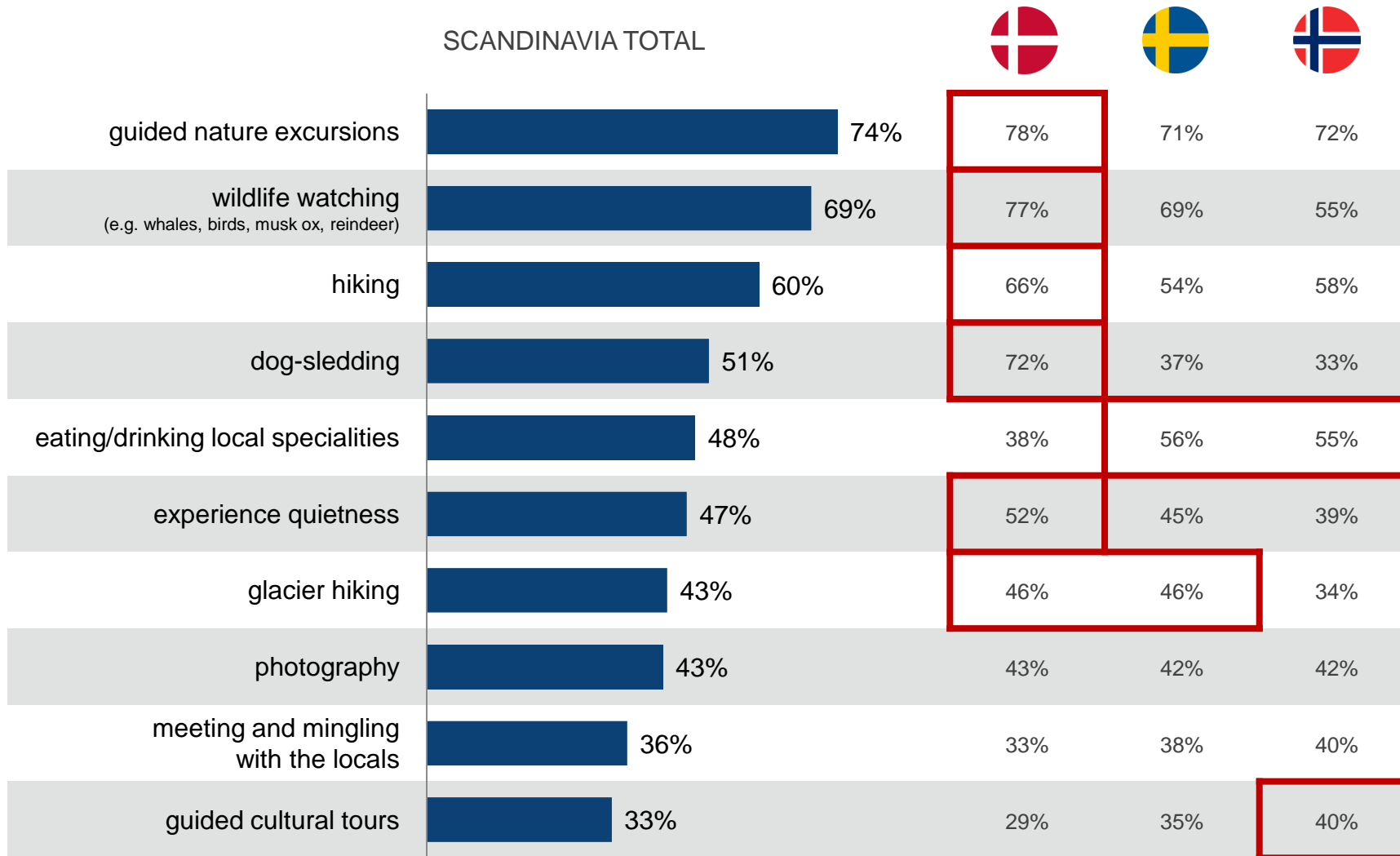
Potential travellers to Greenland: Preferred holiday experiences in Greenland



- » For potential Greenland travellers in Scandinavia it is most important to experience the stunning scenery, glaciers/icebergs and wildlife.
- » This ranking of the top3 experiences is the same in the three markets. Denmark shows the highest figures followed by Sweden and then Norway
- » The second half of the ranking is also very interesting when comparing the countries: We see that the Norwegians are much more into experiencing villages/cities, sights/events and culture/lifestyle than the other markets.
- » On average 4.9 of the 10 aspects are of interest for potential Greenland travellers in Scandinavia. This average is quite similar in the three markets, the variation is only between 5.1 (in Denmark) and 4.8 (in Sweden and Norway)

Q4: *When thinking about travelling to Greenland what would you like to see/experience?*
 Basis: Potential travellers to Greenland from Scandinavia (DK, SE, NO; n=1,147), Denmark (n=576), Sweden (n=282) and Norway (n=352); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

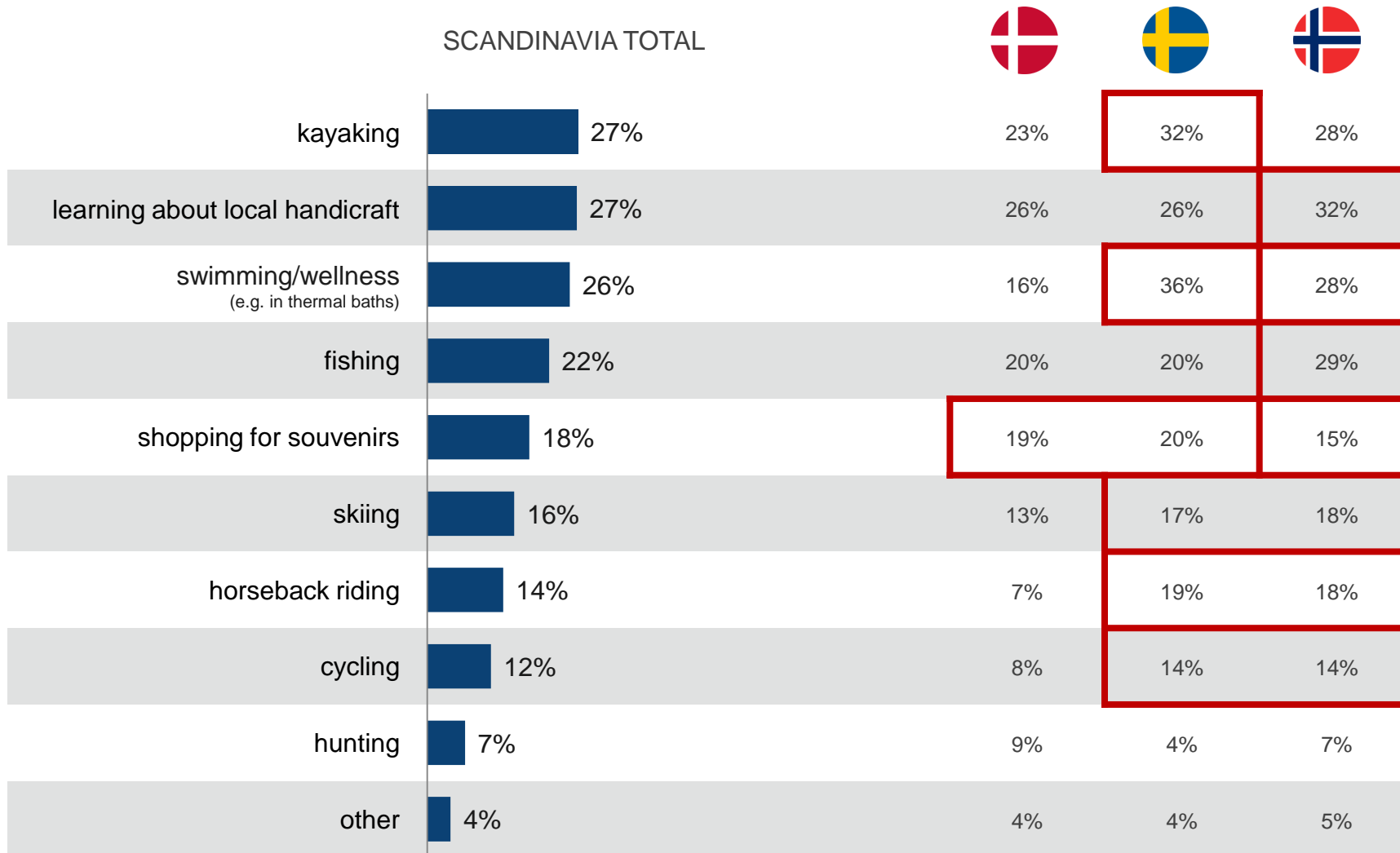
Potential travellers to Greenland: Preferred holiday activities in Greenland I



- » The most sought-after activities in Greenland by potential travellers from Scandinavia are guided nature excursions, wildlife watching, hiking and dog-sledding.
- » While the top-activity “nature excursions” is undisputed, the rankings are quite characteristic per country.
- » Especially the results for dog-sledding are striking in Denmark: Rank 3 with figures double as high as in Sweden and Norway!.
- » Generally, the Danish seem to be mostly nature-minded, while the Norwegians (and on a slightly lesser level Sweden) also have a comparatively strong preference for cultural and culinary experiences.

Q5: Which of the following activities would you like to do when travelling to Greenland?
Basis: Potential travellers to Greenland from Scandinavia (DK, SE, NO; n=1,147), Denmark (n=576), Sweden (n=282) and Norway (n=352); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

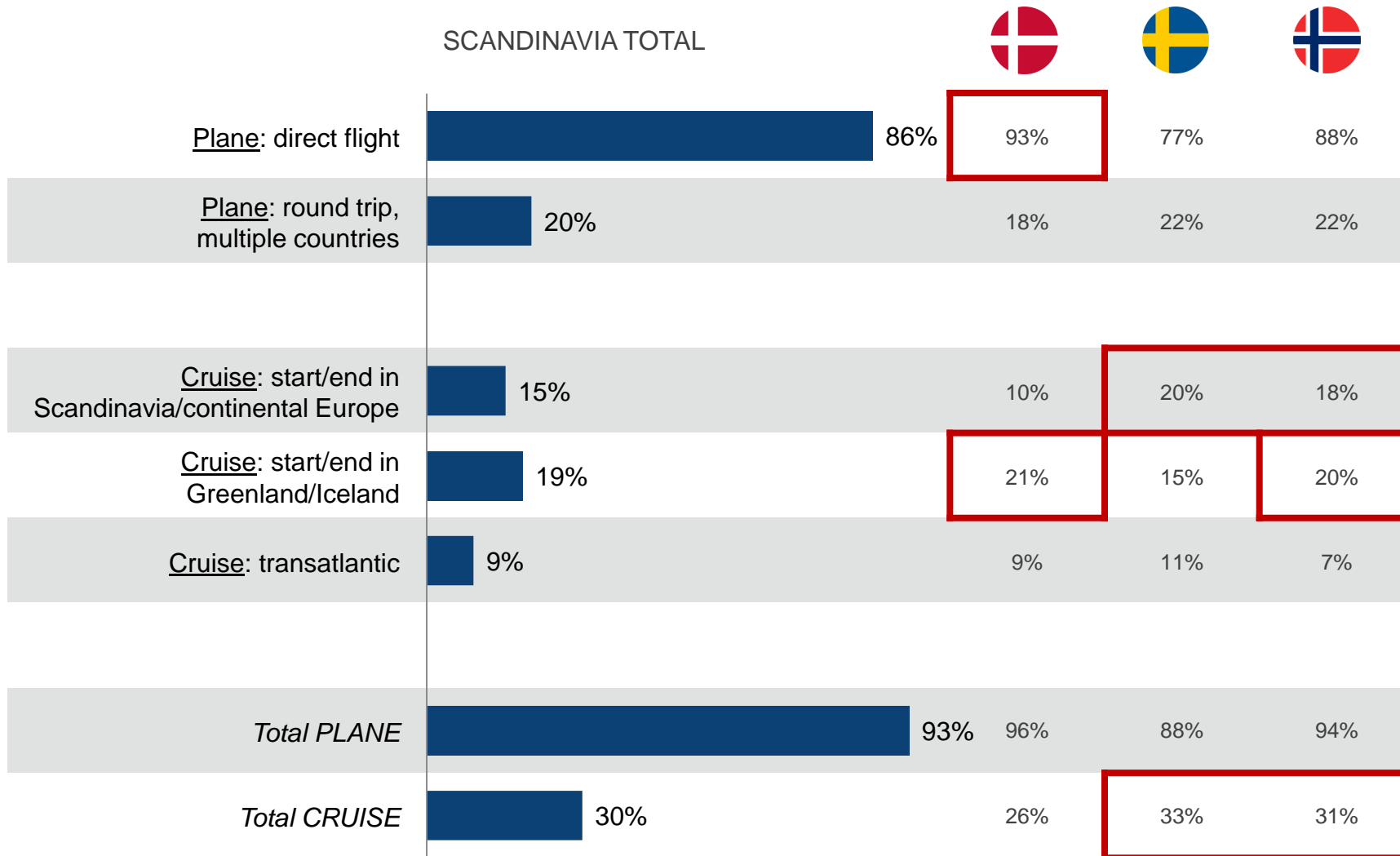
Potential travellers to Greenland: Preferred holiday activities in Greenland II



- » 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 Scandinavian market based ranking), which are mostly secondary or niche activities.
- » Here we see, that Sweden and/or Norway show higher figures regarding most of the activities than Denmark.
- » This might be an indicator that the Danish are a little more knowledgeable about the real offer in Greenland than the potential travellers in the other markets.
- » On the other hand, this might help to make decisions on how to approach the three markets individually.

Q5: Which of the following activities would you like to do when travelling to Greenland?
Basis: Potential travellers to Greenland from Scandinavia (DK, SE, NO; n=1,147), Denmark (n=576), Sweden (n=282) and Norway (n=352); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

Potential travellers to Greenland: Preferences about getting to Greenland



- » Most potential Greenland travellers in Scandinavia prefer direct flights to Greenland. This preference is highest in Denmark (93%) and lowest in Sweden (77%)
- » 20% of the potential travellers in Scandinavia want to visit Greenland during a multi country air trip, less in Denmark than in the other markets.
- » There is a share of 30% of the potential guests in Scandinavia who want to visit Greenland as a cruise destination, less in Denmark than in the other markets.
- » In Denmark and Norway the preferred way to cruise in Greenland would be starting the cruise in Greenland/Iceland.
- » The Swedish prefer cruising to Greenland from a port in Scandinavia/continental Europe.

Q6: How would you like to travel to Greenland?
Basis: Potential travellers to Greenland from Scandinavia (DK, SE, NO; n=1,147), Denmark (n=576), Sweden (n=282) and Norway (n=352); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

Potential travellers to Greenland: Preferences about getting around in Greenland and travel organisation

SCANDINAVIA TOTAL



At the destination

	SCANDINAVIA TOTAL	Denmark	Sweden	Norway
Stay at one location	23%	24%	19%	29%
Stay at multiple locations	72%	73%	75%	67%
Excursions to one of the other countries	23%	17%	27%	29%

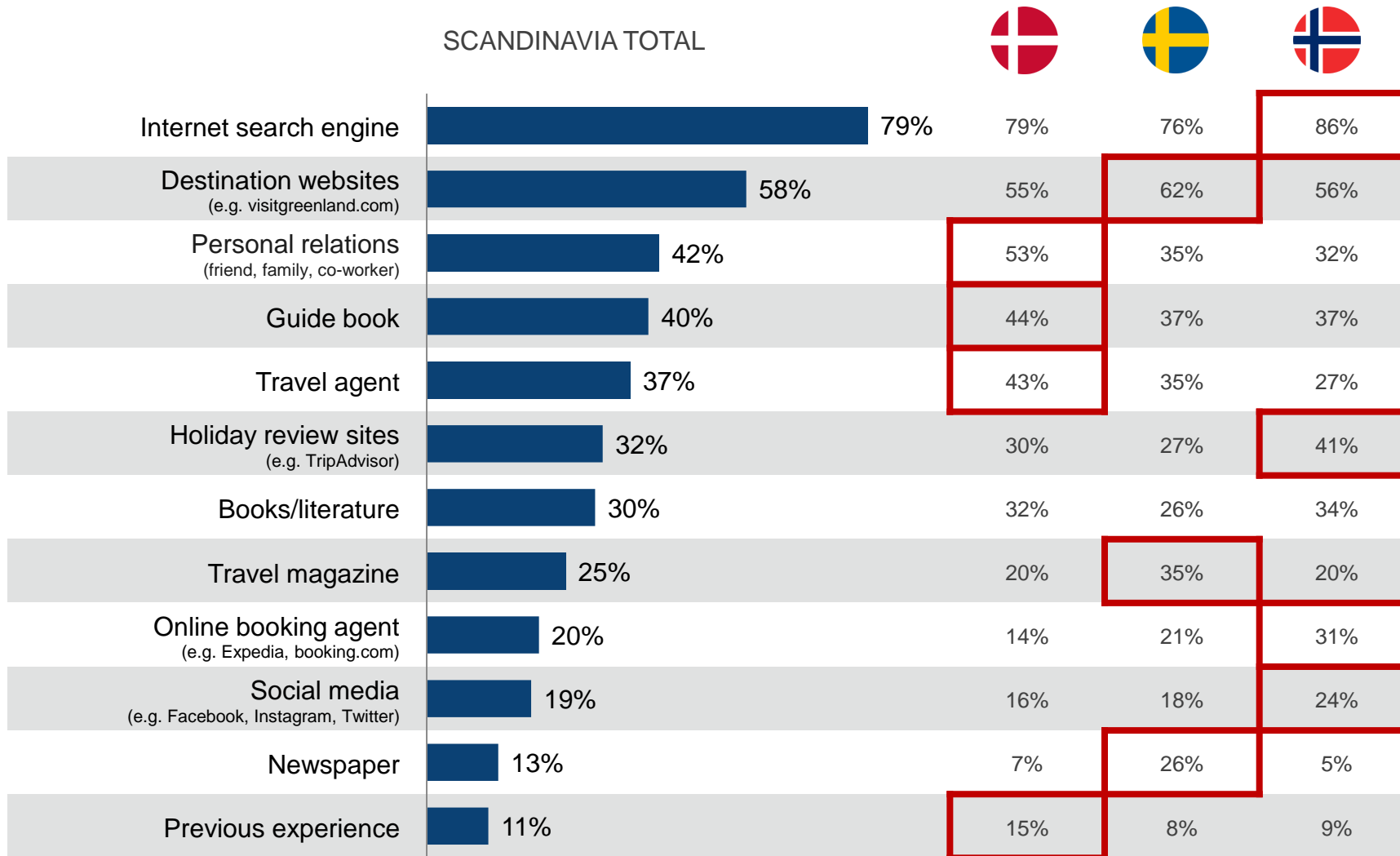
Organisation

	SCANDINAVIA TOTAL	Denmark	Sweden	Norway
Package/tour operator	55%	53%	58%	53%
self	53%	52%	49%	62%

- » Over 70% of the potential Greenland travellers in Scandinavia prefer visiting multiple locations while in Greenland. This figure is lower in Norway than in the other two markets.
- » 23% would like to stay at one location while in Greenland. This figure is highest in Norway.
- » 23% can imagine excursions to another country within the region, more in Sweden and Norway than in Denmark.
- » Regarding the preferred organisation of the trip, the opinion is very balanced between package and self organisation. In Norway the share of “self” is a bit higher, in Sweden the share of “package”.
- » **Please note: This question, as all other questions in the questionnaire, was a multi-punch question, where the interviewee could select more than one of the options.**

Q6: *How would you like to travel to Greenland?*
Basis: Potential travellers to Greenland from Scandinavia (DK, SE, NO; n=1,147), Denmark (n=576), Sweden (n=282) and Norway (n=352); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

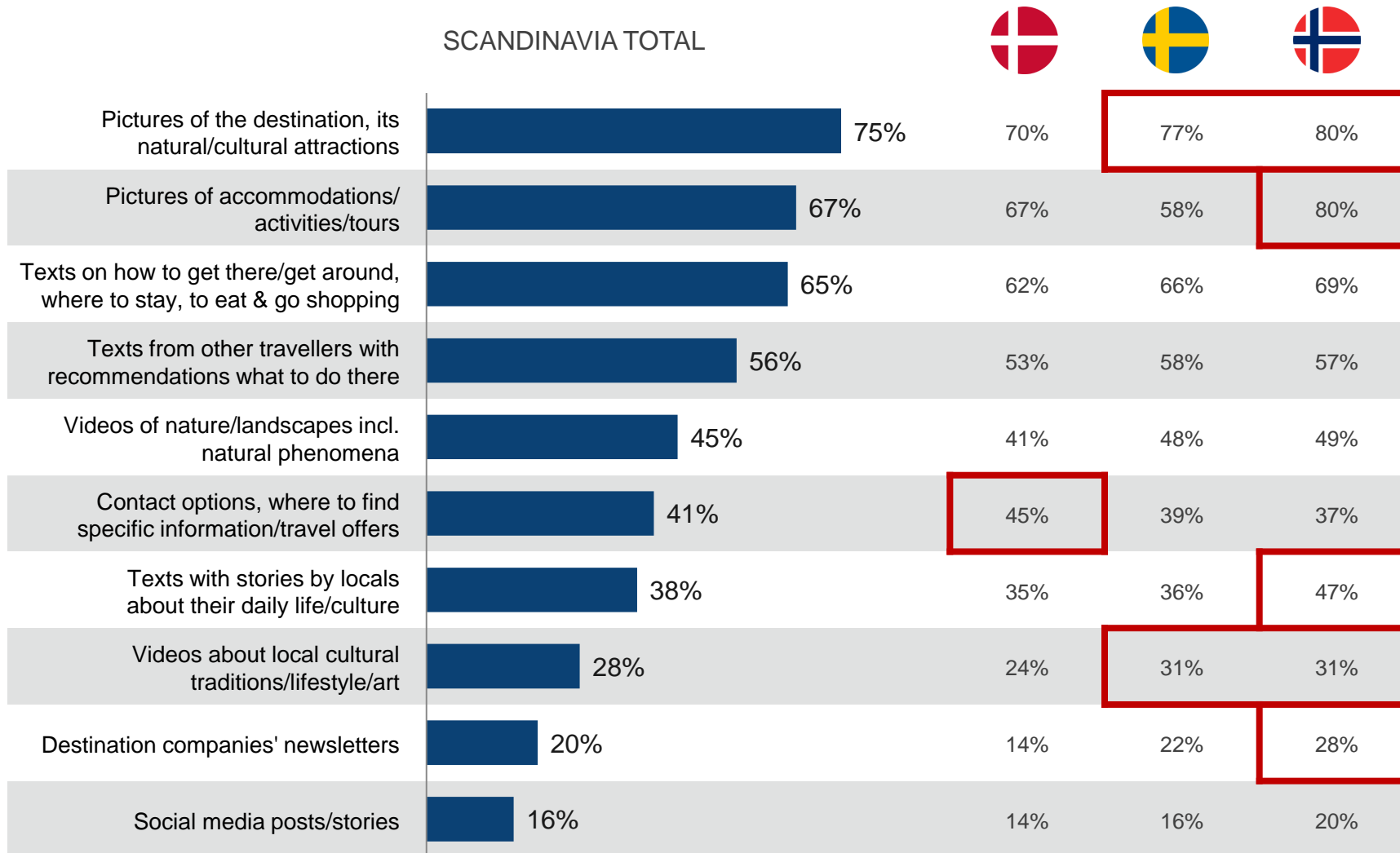
Potential travellers to Greenland: Preferred sources for inspiration & information



- » Internet search engines and destination websites are the most popular sources for information of potential travellers in Scandinavia when planning a trip to Greenland.
- » They are followed by personal relations, guide books and travel agencies.
- » This shows that you need a marketing mix of online and offline sources.
- » The figures and even rankings are quite different in the three markets:
- » In Denmark, personal relations, guide books, travel agents and previous experiences are more important;
- » In Sweden, destination websites, travel magazines and newspapers are more important than in the other markets;
- » In Norway, it's internet search engines, holiday review sites, OTAs and social media.

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 Scandinavia (DK, SE, NO; n=1,147), Denmark (n=576), Sweden (n=282) and Norway (n=352); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

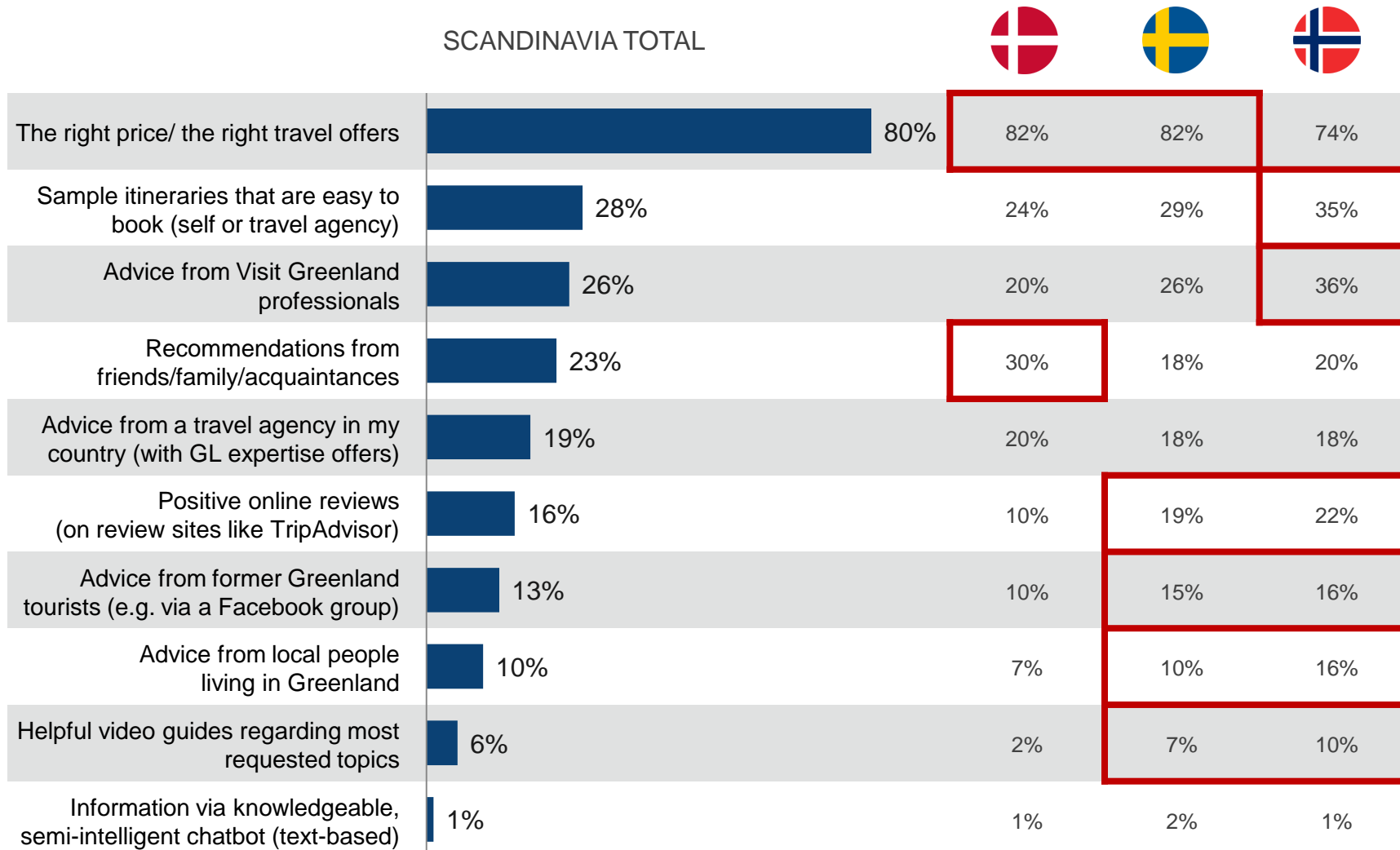
Potential travellers to Greenland: Preferred kind of online content



- » When asked for their preferred kind of online content, most potential Greenland guests in Scandinavia 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.
- » Only a minority is interested in destination newsletters or social media posts.
- » When looking at the differences and similarities between the markets, we see that here the similarities dominate. There are only slight differences:
- » In Denmark slightly more looking for contact options;
- » In Sweden slightly more destination pictures and cultural videos.
- » In Norway slightly more regarding all aspects besides contact options.

Q8: Which kind of content do you like to find when looking for online information about Greenland?
Basis: Potential travellers to Greenland from Scandinavia (DK, SE, NO; n=1,147), Denmark (n=576), Sweden (n=282) and Norway (n=352); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

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






- » This question was added to find out more about the very last step within the travel decision process; the results show the clear dominance to find the “right” product with the “right” price.
- » Following, but on a much lower level of approval, are sample itineraries and Visit Greenland advice.
- » Besides the price/offer that is dominating in all the markets, the ranking differs between Denmark and the other markets.
- » In Denmark, personal recommendations are much more important than in the other markets.
- » In Sweden and Norway, professional advice and tools that provide insights of other travellers’ experiences are more important than in Denmark.

Q9: You have indicated that you would like to visit Greenland within the next 5 years. Please now imagine yourself being in a situation where you're almost ready to book, but still need the final decisive input. What kind of input would be most relevant for you?

Basis: Potential travellers to Greenland from Scandinavia (DK, SE, NO; n=1,147), Denmark (n=576), Sweden (n=282) and Norway (n=352); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat




Potential travellers to Greenland: Preferred sources for inspiration & information in different age breaks

	18-35y.  36+y.	18-35y.  36+y.	18-35y.  36+y.			
Internet search engine	87%	74%	78%	74%	86%	85%
Destination websites (e.g. visitgreenland.com)	60%	52%	65%	59%	61%	54%
Personal relations (friend, family, co-worker)	61%	48%	46%	25%	46%	24%
Guide book	51%	40%	36%	38%	34%	39%
Travel agent	36%	47%	36%	35%	25%	29%
Holiday review sites (e.g. TripAdvisor)	40%	25%	35%	21%	53%	34%
Books/literature	31%	32%	16%	35%	27%	39%
Travel magazine	20%	20%	33%	36%	24%	17%
Online booking agent (e.g. Expedia, booking.com)	19%	12%	30%	13%	37%	26%
Social media (e.g. Facebook, Instagram, Twitter)	27%	10%	23%	14%	36%	17%
Newspaper	5%	7%	19%	32%	7%	4%
Previous experience	10%	17%	11%	5%	12%	7%

- » Generally you find the biggest differences in different age groups when looking at information behaviour and preferences.
- » These slides are to show the differences between older and younger age groups in the three markets.

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 Denmark (18-35y. n=211; 36+y. n=365), Sweden (18-35y. n=128; 36+y. n=155) and Norway (18-35y. n=135; 36+y. n=217), Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat




Potential travellers to Greenland: Preferred kind of online content in different age breaks

	18-35y.  36+y.		18-35y.  36+y.		18-35y.  36+y.	
Pictures of the destination, its natural/cultural attractions	69%	70%	77%	76%	79%	81%
Pictures of accommodations/activities/tours	69%	65%	58%	57%	78%	81%
Texts on how to get there/get around, where to stay, to eat & go shopping	67%	59%	65%	66%	72%	68%
Texts from other travellers with recommendations what to do there	57%	50%	56%	60%	55%	59%
Videos of nature/landscapes incl. natural phenomena	41%	41%	53%	44%	49%	49%
Contact options, where to find specific information/travel offers	40%	48%	41%	37%	33%	39%
Texts with stories by locals about their daily life/culture	35%	35%	28%	<u>42%</u>	39%	<u>52%</u>
Videos about local cultural traditions/lifestyle/art	28%	21%	29%	32%	28%	33%
Destination companies' newsletters	9%	17%	17%	26%	19%	<u>33%</u>
Social media posts/stories	18%	11%	19%	13%	<u>29%</u>	14%

- » Generally you find the biggest differences in different age groups when looking at information behaviour and preferences.
- » These slides are to show the differences between older and younger age groups in the three markets.

Q8: Which kind of content do you like to find when looking for online information about Greenland?
Basis: Potential travellers to Greenland from Denmark (18-35y. n=211; 36+y. n=365), Sweden (18-35y. n=128; 36+y. n=155) and Norway (18-35y. n=135; 36+y. n=217), Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

Potential travellers to Greenland: Final decisive input to book a trip to Greenland in different age breaks

	18-35y.  36+y.	18-35y.  36+y.	18-35y.  36+y.
The right price/ the right travel offers	83%	81%	71%
Sample itineraries that are easy to book (self or travel agency)	20%	28%	37%
Advice from Visit Greenland professionals	13%	19%	30%
Recommendations from friends/family/acquaintances	37%	21%	24%
Advice from a travel agency in my country (with GL expertise offers)	10%	10%	12%
Positive online reviews (on review sites like TripAdvisor)	15%	26%	26%
Advice from former Greenland tourists (e.g. via a Facebook group)	14%	16%	23%
Advice from local people living in Greenland	10%	11%	17%
Helpful video guides regarding most requested topics	3%	6%	9%
Information via knowledgeable, semi-intelligent chatbot (text-based)	3%	1%	2%

- » Generally you find the biggest differences in different age groups when looking at information behaviour and preferences.
- » These slides are to show the differences between older and younger age groups in the three markets.

Q9: You have indicated that you would like to visit Greenland within the next 5 years. Please now imagine yourself being in a situation where you're almost ready to book, but still need the final decisive input. What kind of input would be most relevant for you?

Basis: Potential travellers to Greenland from Denmark (18-35y. n=211; 36+y. n=365), Sweden (18-35y. n=128; 36+y. n=155) and Norway (18-35y. n=135; 36+y. n=217), Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

To learn 3: Product preferences of potential travellers to Greenland

Experiences:

- » For potential Greenland travellers in Scandinavia it is most important to experience the stunning scenery, glaciers/icebergs and wildlife. This ranking of the top3 experiences is the same in the three markets. Denmark shows the highest figures followed by Sweden and then Norway.
- » The second half of the ranking is also very interesting when comparing the countries: We see that the Norwegians are much more into experiencing villages/cities, sights/events and culture/lifestyle than the other markets.

Activities:

- » The most sought-after activities in Greenland by potential travellers from Scandinavia are guided nature excursions, wildlife watching, hiking and dog-sledding.
- » While the top-activity “nature excursions” is undisputed, the rankings are quite characteristic per country. Especially the results for dog-sledding are striking in Denmark: Rank 3 with figures double as high as in Sweden and Norway!. Generally, the Danish seem to be mostly nature-minded, while the Norwegians (and on a slightly lesser level Sweden) also have a comparatively strong preference for cultural and culinary experiences.

Getting there/around:

- » Most potential Greenland travellers in Scandinavia would prefer direct flights into Greenland. There is a share of around 30% of the potential guests in

Scandinavia who want to visit Greenland as a cruise destination. While in Greenland, most potential guests would like to see multiple destinations.

Information sources:

- » Internet search engines and destination websites are the most popular sources for information of potential travellers in Scandinavia when planning a trip to Greenland. They are followed by personal relations, guide books and travel agencies.
- » The figures and even rankings are quite different in the three markets: In Denmark, personal relations, guide books, travel agents and previous experiences are more important; in Sweden, destination websites, travel magazines and newspapers are more important than in the other markets; in Norway, it's internet search engines, holiday review sites, OTAs and social media.

Online content:

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

Final decisive input:

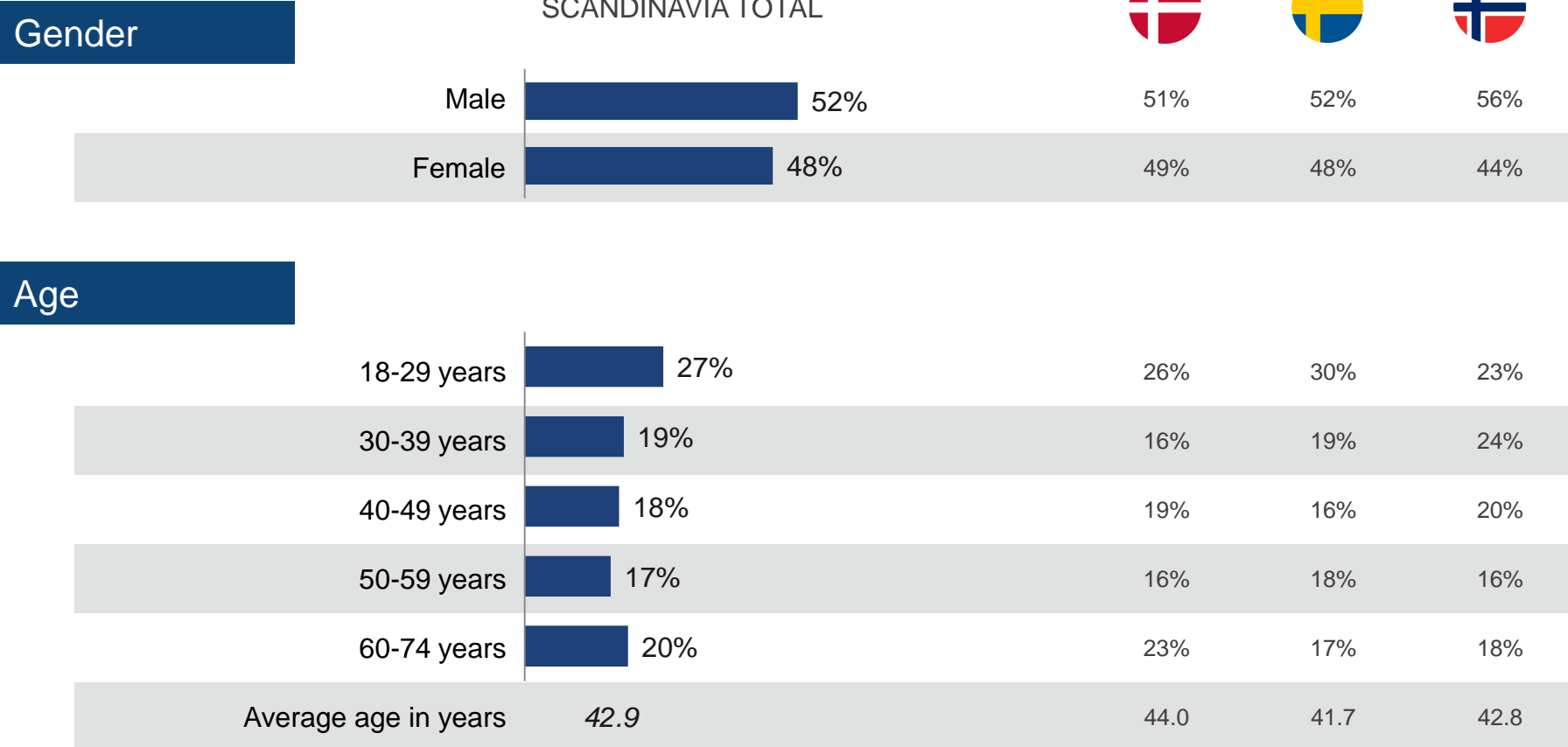
- » In this phase right before the travel decision to Greenland it is crucial to find the “right” product with the “right” price. Following, but on a much lower level of approval, are sample itineraries and Visit Greenland advice.

- » This chapter is basically the CORE of the study and was the focus of the questionnaire.
- » The results help to understand in detail how the potential travellers would like to spend their holidays in Greenland. This knowledge should give you substantial help with regard to product development, marketing strategy and communication.
- » It is even possible and smart to go deeper into different segments of potential guests; e.g. age groups (pp. 34-36) or with the Visit Greenland segments (chapter 5).

A group of people are playing soccer on a dirt field in a coastal village. In the foreground, a man in a black jacket and light-colored pants is kicking the ball, while another man in a black and red jacket is blocking him. Other people are watching or playing in the background. The buildings are blue and white, and the terrain is rocky and hilly.

4. Socio-demographic profiles of potential travellers to Greenland

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



- » Potential Greenland travellers in Scandinavia are slightly more often male than female.
- » The highest ratio of potential male travellers can be seen in Norway (56%), while Sweden and Denmark are more evenly distributed on sexes.
- » The age structure of potential Greenland travellers is well balanced over the age groups between 18 and 74 years, only with the youngest (18-29 years) age group being a bit larger than the others.
- » The youngest average age of potential travellers to Greenland is found in Sweden (41.7 years), in Denmark the average age is the highest (44.0 years).

Basis: Potential travellers to Greenland from Scandinavia (DK, SE, NO; n=1,147), Denmark (n=576), Sweden (n=282) and Norway (n=352); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

Potential travellers to Greenland: Demographics II (occupation)

Occupation

SCANDINAVIA TOTAL



Occupation	SCANDINAVIA TOTAL	Denmark	Sweden	Norway
Studies	14%	16%	13%	13%
Part-time work	9%	8%	9%	9%
Full-time work	51%	50%	52%	52%
Own business	6%	6%	5%	7%
Retired	14%	16%	15%	10%
Unemployed	3%	3%	2%	3%
Other (e.g. homemaking, parental/sick leave)	3%	1%	3%	7%

- » More than half of all potential travellers to Greenland in Scandinavia are working full-time.
- » Students and retirees are also two very important sociodemographic groups to keep in mind.
- » The differences between the three markets are only very slim.

Basis: Potential travellers to Greenland from Scandinavia (DK, SE, NO; n=1,147), Denmark (n=576), Sweden (n=282) and Norway (n=352); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

Potential travellers to Greenland: Demographics III (marital status)

Martial status

SCANDINAVIA TOTAL



Marital status	SCANDINAVIA TOTAL	Denmark	Sweden	Norway
Living alone/Single (with or without children in household)	26%	26%	22%	32%
Married/Partner <i>without</i> children	36%	34%	41%	34%
Married/Partner <i>with</i> children	25%	26%	25%	25%
Living with parents	5%	3%	6%	6%
Other (e.g. divorced/separated, widower)	8%	12%	6%	4%

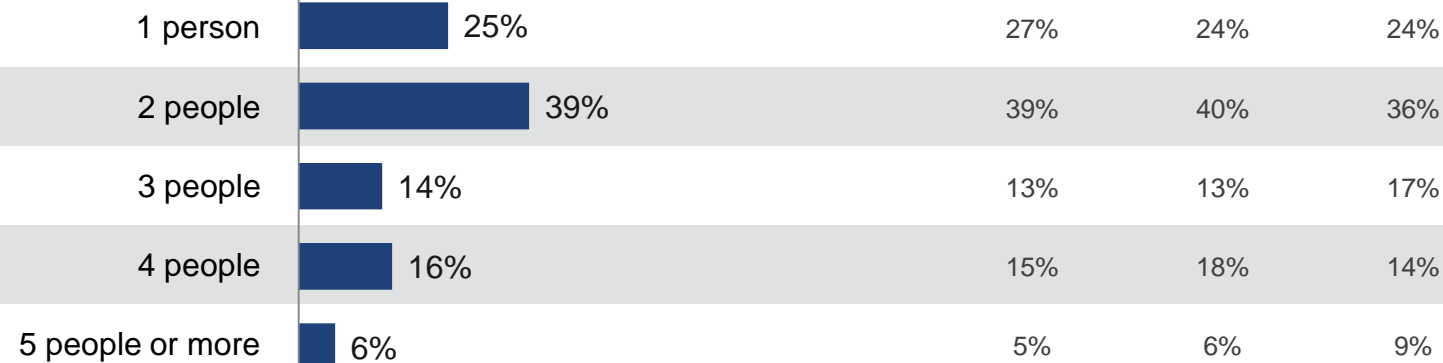
- » The most important target group amongst potential travellers to Greenland are (married) couples without children in the household.
- » Singles and families (living with partner and children in household) are also quite large segments.
- » Comparing the three markets, we see more singles in Norway and more couples without children in Sweden than in the other two markets.

Basis: Potential travellers to Greenland from Scandinavia (DK, SE, NO; n=1,147), Denmark (n=576), Sweden (n=282) and Norway (n=352); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

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

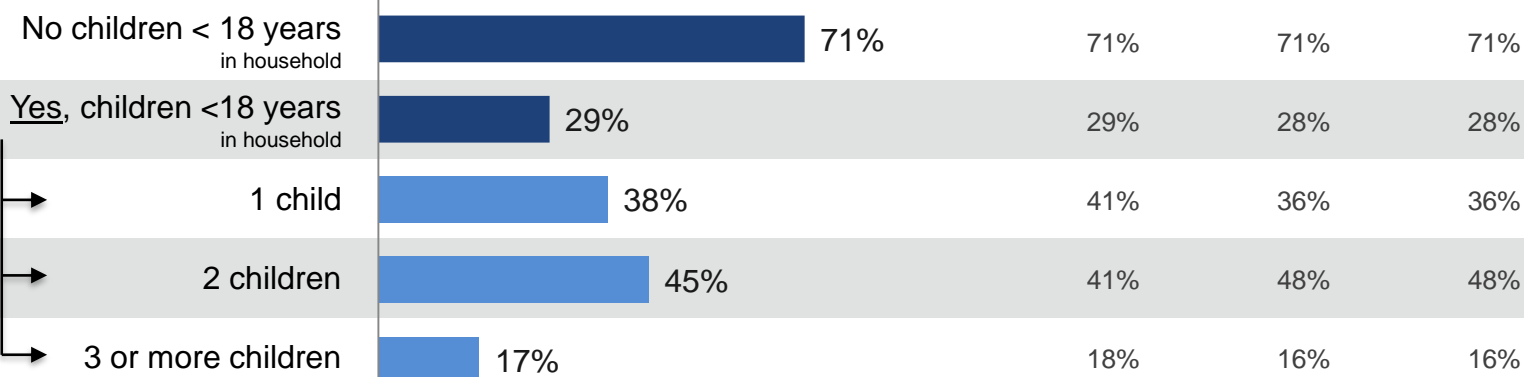
Size of household

SCANDINAVIA TOTAL



- » The biggest group of potential travellers to Greenland in Scandinavia lives in households of two people.
- » Less than one third of all potential travellers to Greenland do live with children under 18 years in household.
- » In most households with children, there are two kids, followed by single-child households.
- » There are only very minor differences between the three markets.

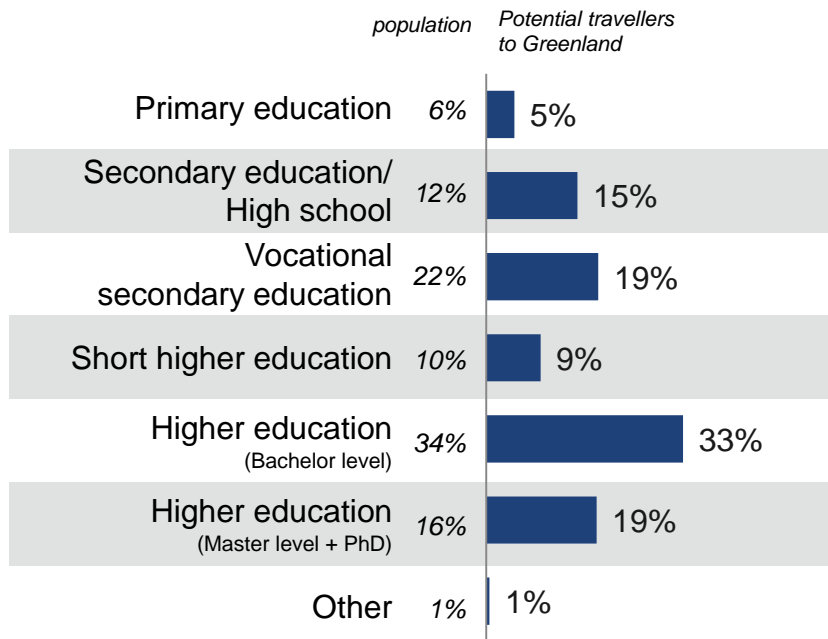
Children in household



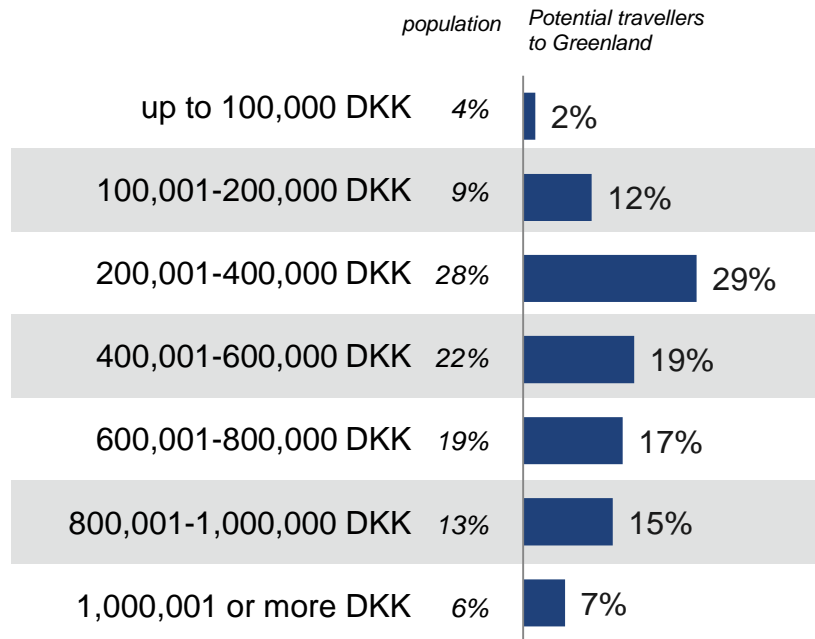
Basis: Potential travellers to Greenland from Scandinavia (DK, SE, NO; n=1,147), Denmark (n=576), Sweden (n=282) and Norway (n=352); Missing % to 100: No answer
Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

Potential travellers to Greenland in Denmark: Demographics V (education & income)

Education



Household income*



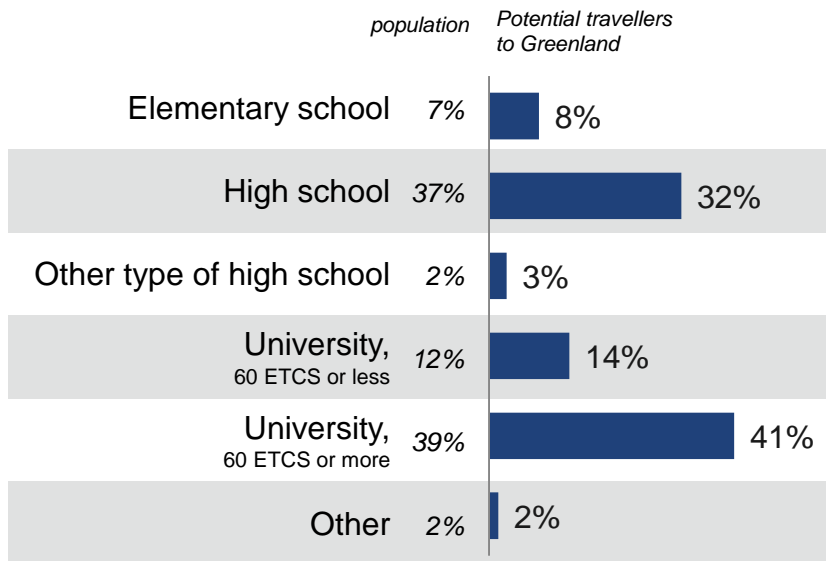
- » Regarding their formal education, we find that potential Greenland travellers in Denmark have a similar education level as the average Danish population.
- » More than half of potential travellers from Denmark hold a Bachelors degree or better.
- » Looking at the average yearly income per household, the biggest group amongst potential travellers to Greenland earns about 200,000-400,000 DKK.

Basis: Total population (n=2,000) vs. potential travellers to Greenland from Denmark (n=576);
 * Household income (annual net): only potential travellers to Greenland who gave an answer to this question (n=471)
 Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

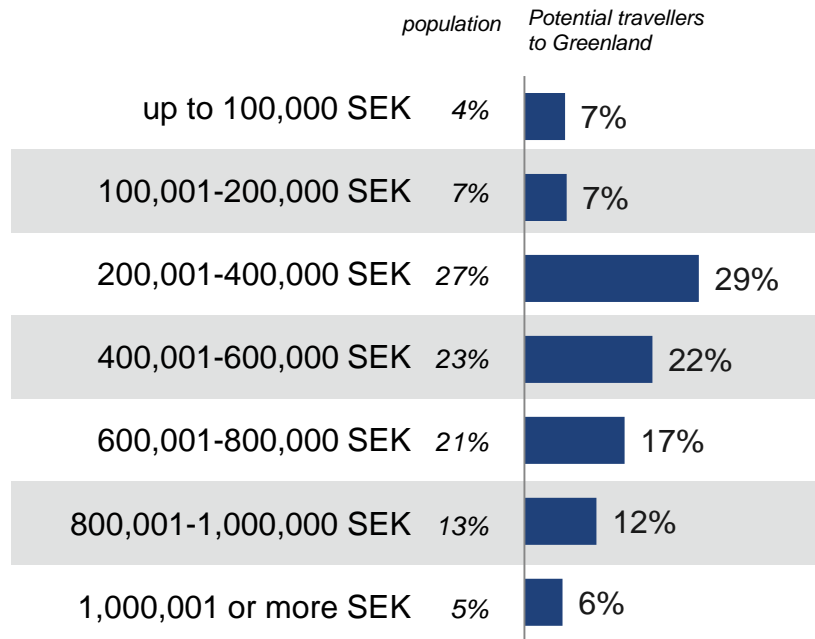


Potential travellers to Greenland in Sweden: Demographics V (education & income)

Education



Household income*



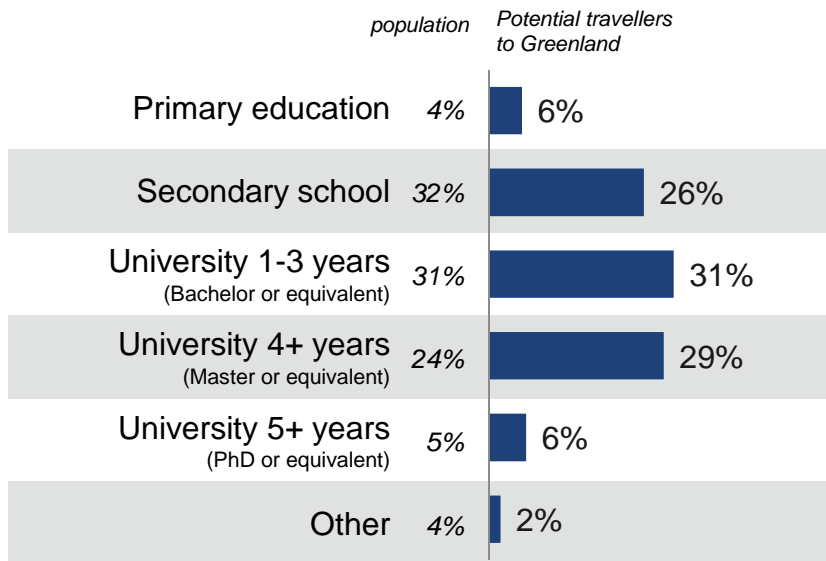
- » Regarding their formal education, we find that potential Greenland travellers in Sweden have a slightly higher education level as the average Swedish population.
- » More than 40% hold a Bachelor degree (60 ETCS) or better.
- » The income structure of potential Greenland travellers is quite similar to that of the Swedish population.
- » The biggest group amongst potential travellers to Greenland earns about 200,000-400,000 SEK.

Basis: Total population (n=2,000) vs. potential travellers to Greenland from Sweden (n=282);
 * Household income (annual net): only potential travellers to Greenland who gave an answer to this question (n=213)
 Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

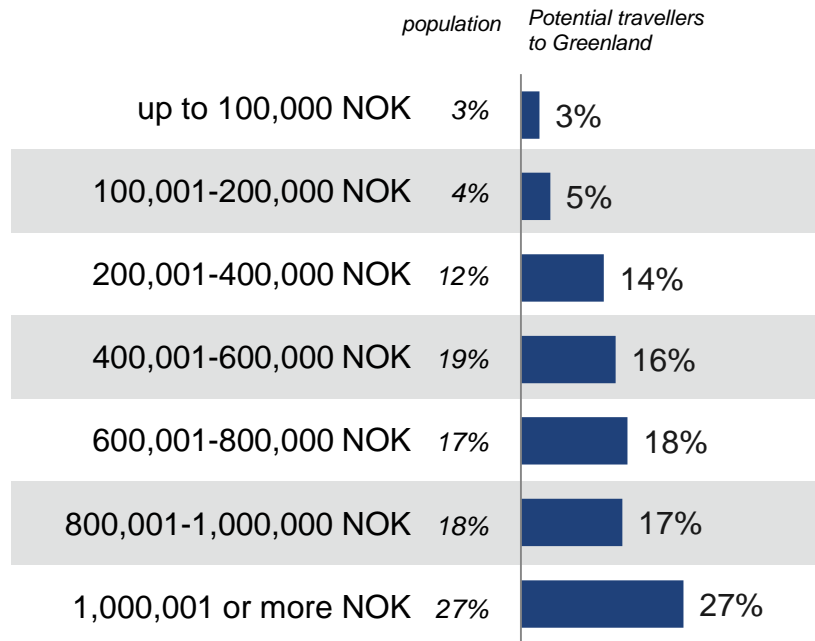


Potential travellers to Greenland in Norway: Demographics V (education & income)

Education



Household income*



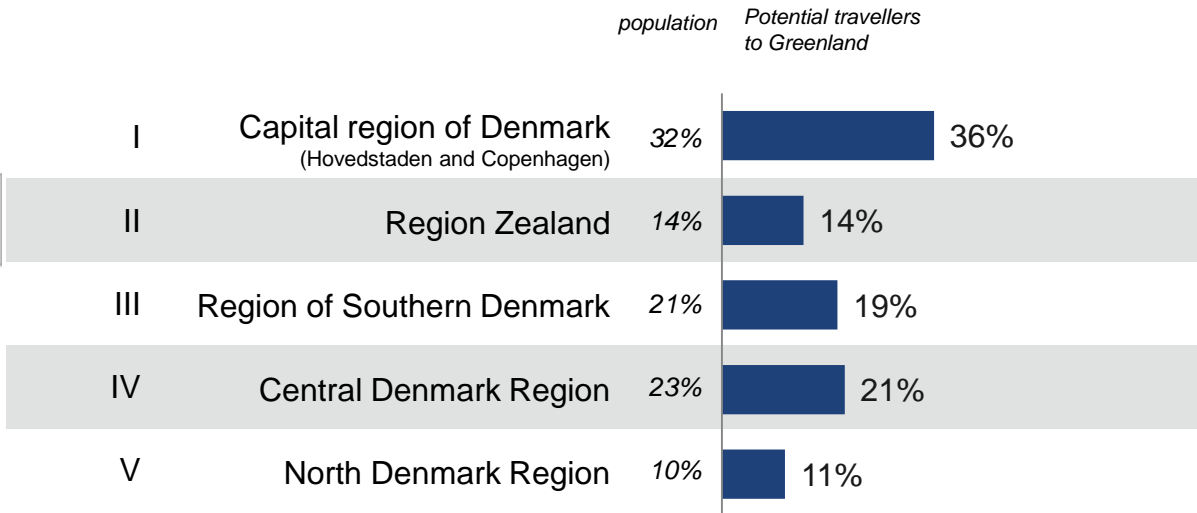
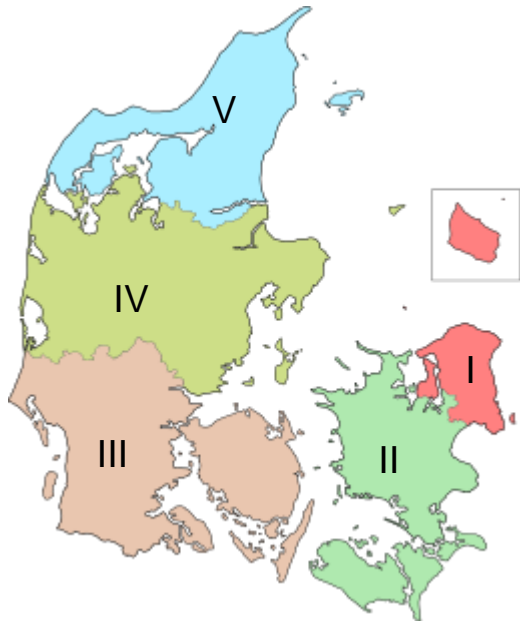
- » Regarding their formal education, we find that potential Greenland travellers in Norway have a higher education than the average Norwegian person.
- » Two thirds hold an academic degree (Bachelor or better).
- » The average yearly income per household is very high compared to the other markets, with the biggest group earning more than 1,000,000 NOK.

Basis: Total population (n=2,000) vs. potential travellers to Greenland from Norway (n=352);
 * Household income (annual net): only potential travellers to Greenland who gave an answer to this question (n=279)
 Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat



Potential travellers to Greenland in Denmark: Demographics VI (regions)

Regions



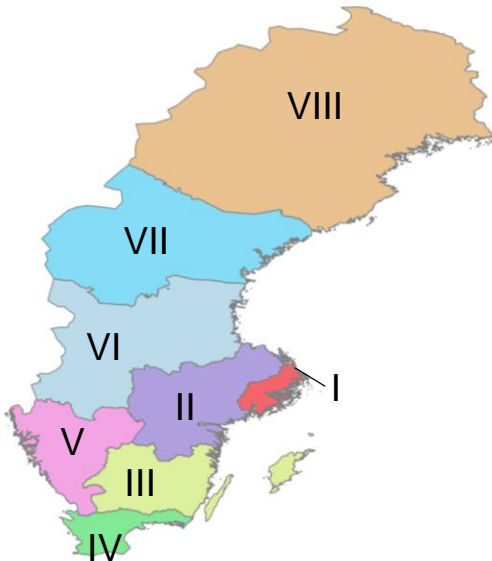
» The regional spread of potential travellers to Greenland in Denmark shows a slight concentration with the capital region of Copenhagen.

Basis: Total population (n=2,000) vs. potential travellers to Greenland from Denmark (n=576);
Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat



Potential travellers to Greenland in Sweden: Demographics VI (regions)

Regions



		population	Potential travellers to Greenland
I	Stockholm	23%	29%
II	Eastern Mid-Sweden	17%	13%
III	Smaland incl. Oland & Gotland	8%	9%
IV	Southern Sweden	15%	15%
V	Western Sweden	20%	19%
VI	Northern Mid-Sweden	8%	6%
VII	Central parts of North Sweden	4%	4%
VIII	Northern parts of North Sweden	5%	5%

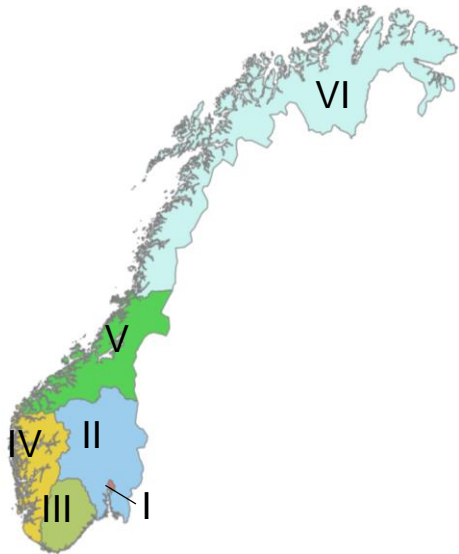
» The regional spread of potential travellers to Greenland in Sweden shows a slight concentration with the capital region of Stockholm.

Basis: Total population (n=2,000) vs. potential travellers to Greenland from Sweden (n=282);
Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat



Potential travellers to Greenland in Norway: Demographics VI (regions)

Regions



		population	Potential travellers to Greenland
I	Oslo	13%	17%
II	Eastern Norway	34%	34%
III	Southern Norway and Telemark	9%	6%
IV	Western Norway	21%	22%
V	Trondelag (Mid Norway)	14%	11%
VI	Northern Norway	9%	10%

» In Norway, the capital of Oslo and the surrounding Eastern region is home to more than half of all potential travellers to Greenland.

Basis: Total population (n=2,000) vs. potential travellers to Greenland from Norway (n=352);
Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

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

- » Gender: Potential Greenland travellers in Scandinavia are slightly more often male than female. The highest ratio of potential male travellers can be seen in Norway (56%), while Sweden and Denmark are more evenly distributed on sexes.
- » Age: The age structure of potential Greenland travellers is well balanced over the age groups between 18 and 74 years, only the youngest (18-29 years) age group being a bit larger than the others. The youngest average age of potential travellers to Greenland is found in Sweden (41.7 years), in Denmark the average age is the highest (44.0 years).
- » Marital status: The most important target group amongst potential travellers to Greenland are (married) couples without children in the household. Singles and families (living with partner and children in household) are also quite large segments. Comparing the three markets, we see more singles in Norway and more couples without children in Sweden than in the other two markets.
- » Education: Regarding their formal education, we find that potential travellers in Sweden and Norway have a higher education than the population average. In the Denmark the structure is quite similar to the population.
- » Monthly household net income: In all three markets the income structure does not differ much from the population. There are general differences between the countries, though. While in Denmark and Sweden most persons can be found in the middle income groups, in Norway the higher income groups dominate.
- » Regional structure: Again the regional distribution of the potential Greenland guests in all three markets does not differ much from the population. In all three markets, the more densely populated areas such as the capital regions with the easiest access to overseas travel are slightly overrepresented.

- » In most regards, the demographic profiles of potential Greenland travellers in the three markets do not differ much from the population. This means you do not have to take peculiarities into account when addressing them.
- » On the other hand, the small but noticeable differences may show opportunities for specific targeting (e.g. high education level in Sweden and Norway, more singles in Norway, couples without children in Sweden).

5. Visit Greenland segmentation
of potential travellers

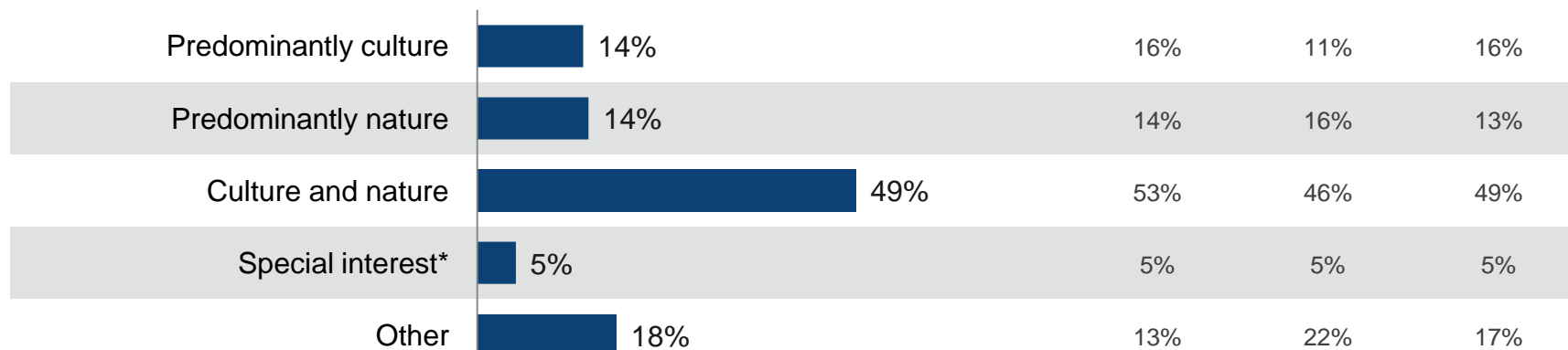


Interest focus & engagement level (population): Basis for the Visit Greenland segmentation approach

SCANDINAVIA TOTAL



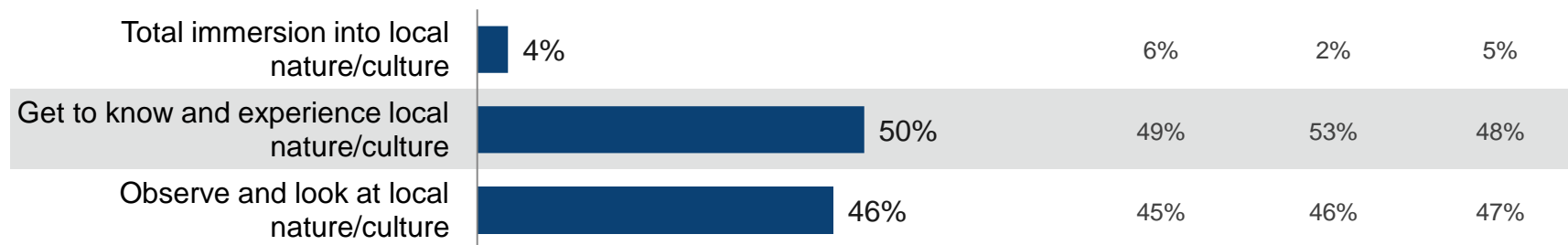
Interest focus



*like photography, river fishing, hunting, heli-skiing, etc.

- » 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.
- » The mix of culture and nature is dominating, in total Scandinavia as in the three markets. The figure for “culture and nature” is highest in Denmark.
- » In Scandinavia, the “experience” dimension ranks highest in terms of engagement, closely followed by the “observation” dimension. The “immersion” dimension is very small.

Engagement level



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 Scandinavia (DK, SE, NO) (n=6,000), in Denmark (n=2000), Sweden (n=2000), Norway (n=2000); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

Visit Greenland segmentation: Scandinavia (population)

		INTEREST FOCUS			
		Culture	Culture&Nature	Nature	Personal Challenge
ENGAGEMENT LEVEL	Immersion	3% Ethnophile		1% Wilderness Seeker	5% Special Interest
	Interaction	7% Culture Lover	27% Globetrotter	6% Nature Lover	
	Observation	6% Culture Appreciator	20% Sightseer	8% Nature Appreciator	18% no segment

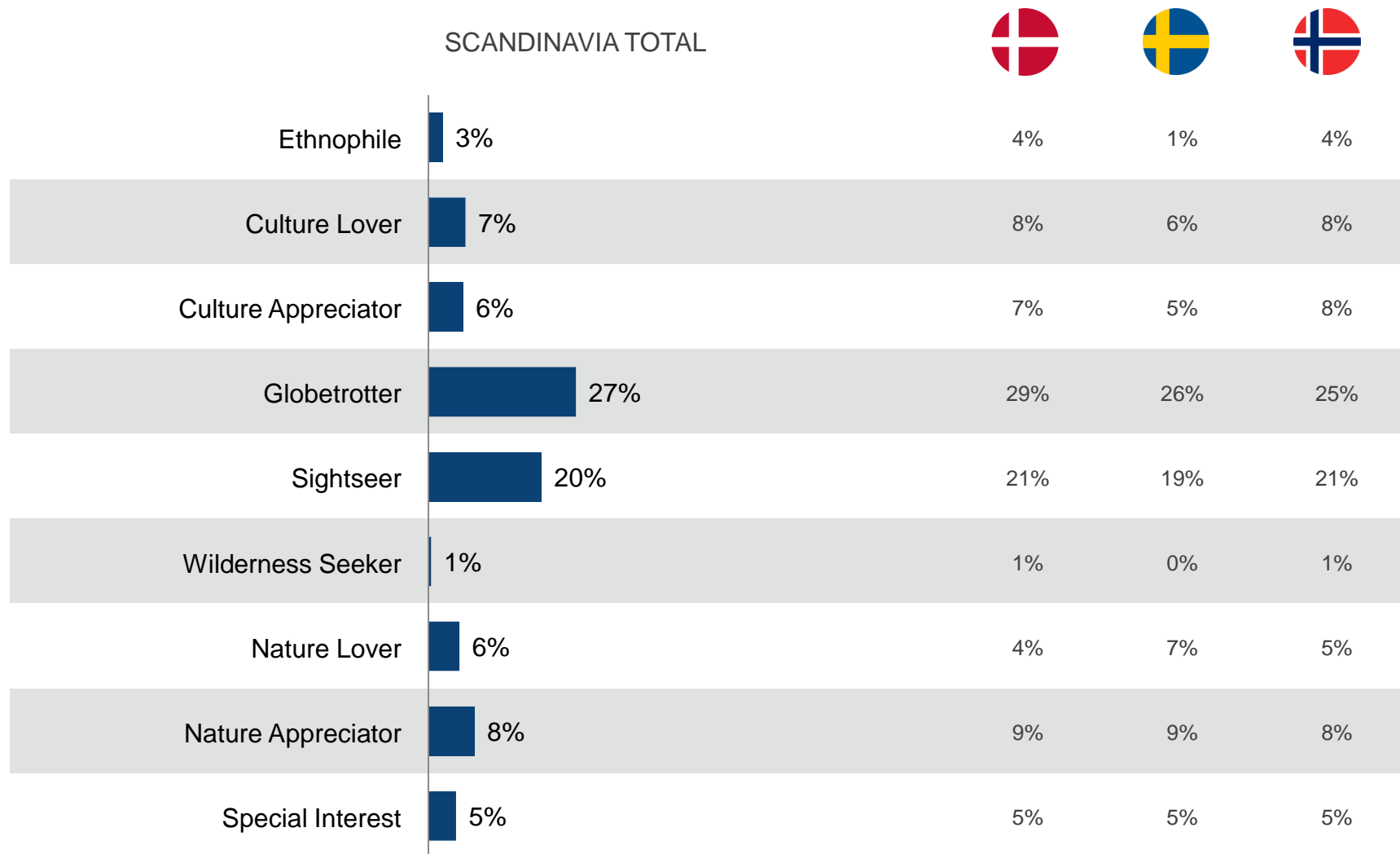
- » This matrix now shows the actual segments and how they are created based on the results of the previous slide.
- » Looking at the population in Scandinavia, the Globetrotters are the largest segment with a share of 27%.
- » Second come the Sightseers with 20%.
- » All other segments have shares of 8% and below.
- » You find detailed analyses of the VG-Segments in the three markets in the annex of this report.

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 Scandinavia (DK, SE, NO) (n=6,000); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

Visit Greenland segmentation in Denmark, Sweden and Norway (population)



- » Looking at the differences between the three markets, you find that they are very much alike regarding the structure of the segments.
- » The only slight difference you find is that there is a smaller share of the cultural segments in Sweden than in the other markets.

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 Scandinavia (DK, SE, NO) (n=6,000), in Denmark (n=2000), Sweden (n=2000), Norway (n=2000); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

Interest focus & engagement level (potential travellers to Greenland)

SCANDINAVIA TOTAL



Interest focus

Interest focus	SCANDINAVIA TOTAL	Denmark	Sweden	Norway
Predominantly culture	13%	15%	9%	15%
Predominantly nature	14%	14%	16%	13%
Culture and nature	56%	59%	52%	57%
Special interest*	6%	5%	9%	5%
Other	10%	7%	13%	10%

*like photography, river fishing, hunting, heli-skiing, etc.

- » Looking now at the potential travellers to Greenland in Scandinavia, we see the following picture:
- » Regarding the interest focus, there is less “other” than in the population and more “culture and nature”. There are only slight differences between the markets, most notably, Sweden is less “predominantly culture” than the other markets.
- » Regarding the engagement level, the “experience” dimension is higher and the “observation” dimension lower than in the population. The differences between the markets are very slim.

Engagement level

Engagement level	SCANDINAVIA TOTAL	Denmark	Sweden	Norway
Total immersion into local nature/culture	6%	6%	4%	8%
Get to know and experience local nature/culture	58%	54%	51%	51%
Observe and look at local nature/culture	36%	33%	33%	32%

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 Scandinavia (DK, SE, NO; n=1,147), Denmark (n=576), Sweden (n=282) and Norway (n=352); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

Visit Greenland segmentation: Scandinavia (potential travellers to Greenland)

		INTEREST FOCUS			
		Culture	Culture&Nature	Nature	Personal Challenge
ENGAGEMENT LEVEL	Immersion	4% Ethnophile		1% Wilderness Seeker	6% Special Interest
	Interaction	7% Culture Lover	35% Globetrotter	6% Nature Lover	
	Observation	5% Culture Appreciator	18% Sightseer	8% Nature Appreciator	10% no segment

- » Looking at the potential Greenland travellers in Scandinavia, the Globetrotters with a share of 35% are dominating.
- » Second come the Sightseers with 18%.
- » All other segments have shares of 8% and below.
- » Compared with the population, this means that there are more Globetrotters and less Sightseers within the potential travellers to Greenland.

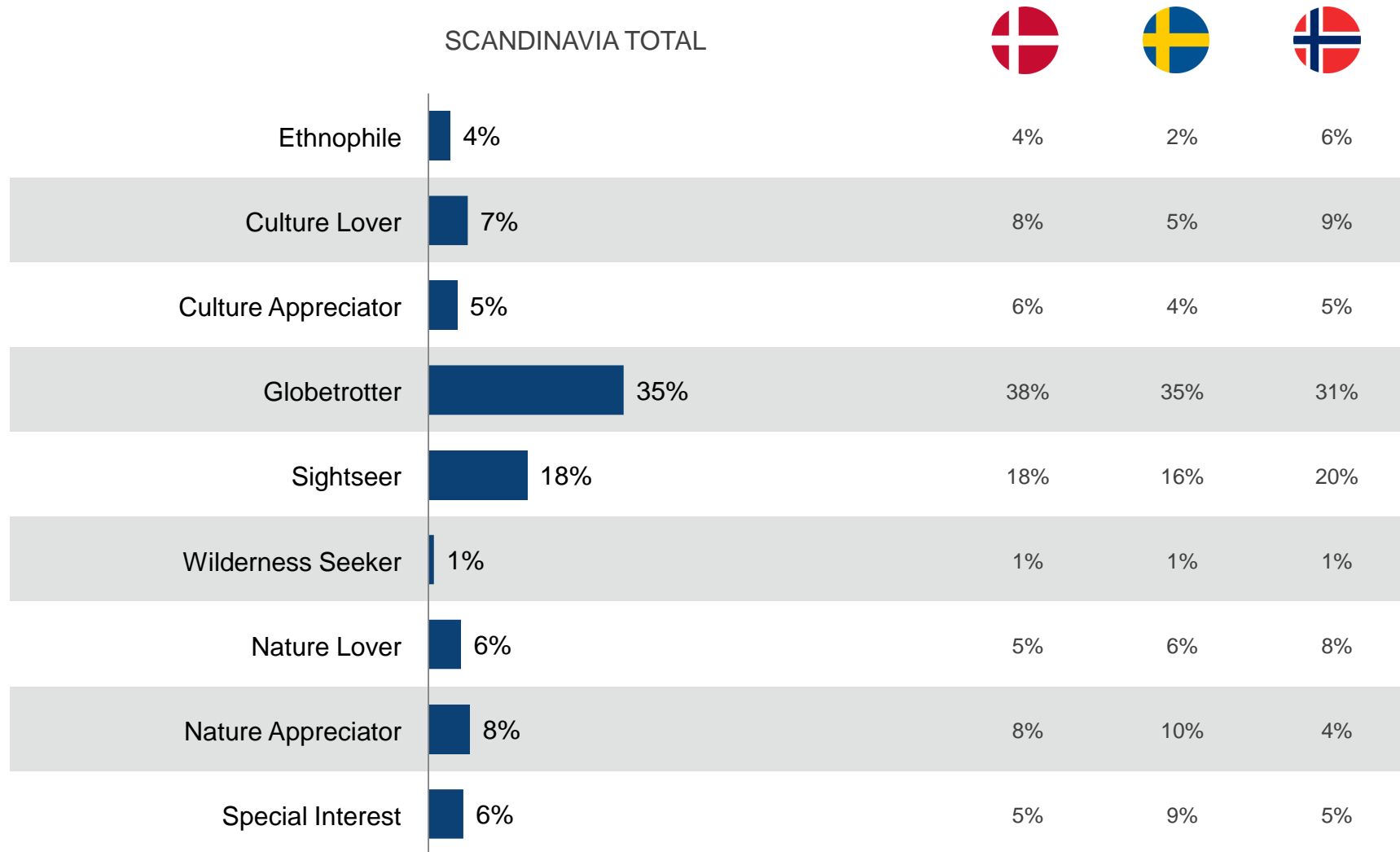
Q1a: When you travel in general, is it the destination's nature or culture that you want to experience? Or is it something else that motivates you to travel?

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 Scandinavia (DK, SE, NO; n=1,147); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

Visit Greenland segmentation in Denmark Sweden and Norway (potential travellers to Greenland)

SCANDINAVIA TOTAL



- » Looking at the differences between the three markets, you find that they are very much alike regarding the structure of the segments.
- » Again, the only slight difference you find is that there is a smaller share of the cultural segments in Sweden than in the other markets.

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 Scandinavia (DK, SE, NO; n=1,147), Denmark (n=576), Sweden (n=282) and Norway (n=352); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

To learn 5: Visit Greenland segmentation of potential travellers

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:

- » The mix of culture and nature is dominating, in total Scandinavia as in the three markets. The figure for “culture and nature” is highest in Denmark.
- » In Scandinavia, the “experience” dimension ranks highest in terms of engagement, closely followed by the “observation” dimension. The “immersion” dimension is very small.

Segments:

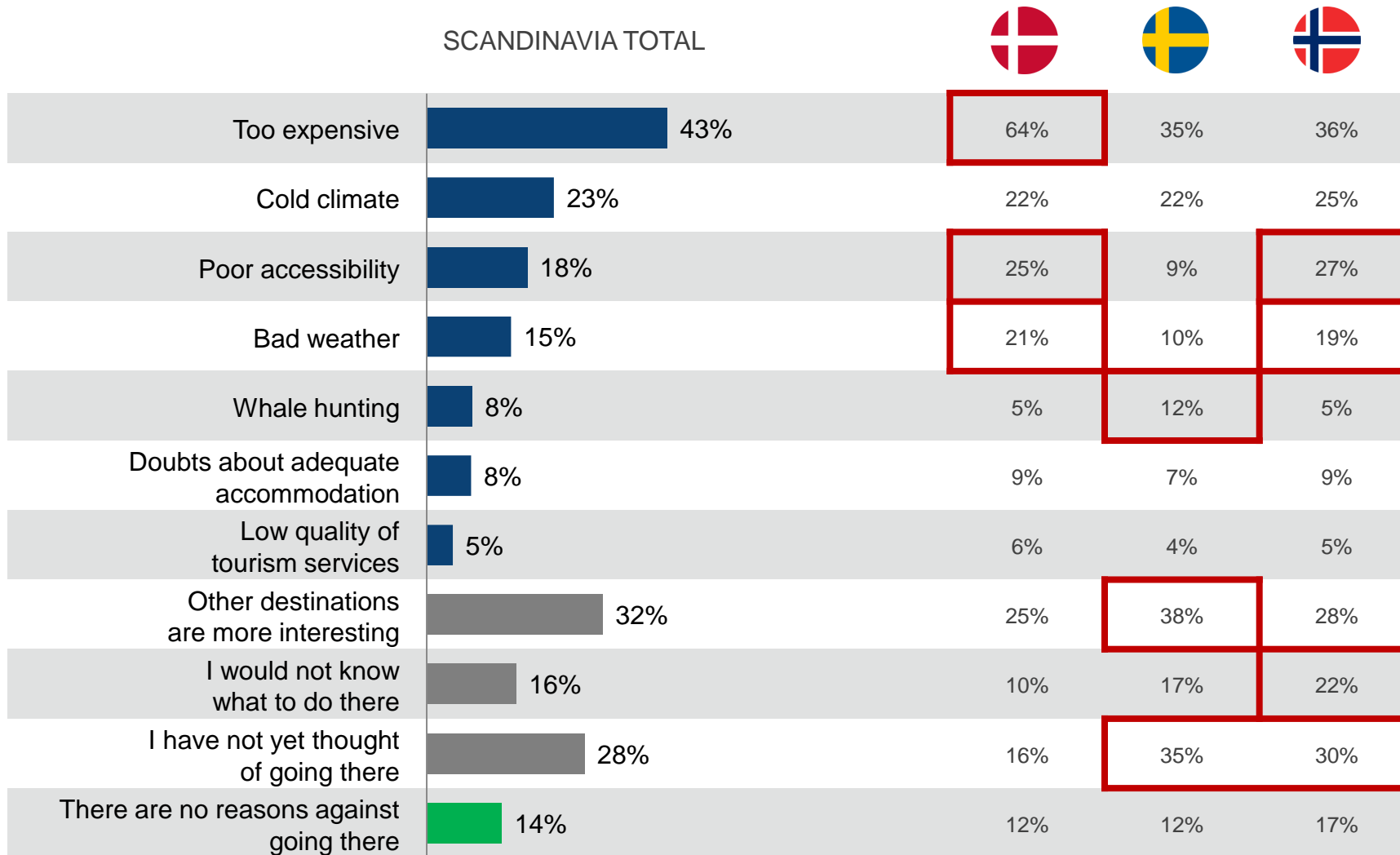
- » Looking at the population in Scandinavia, the Globetrotters are the largest segment with a share of 27%. Second come the Sightseers with 20%. All other segments have shares of 8% and below.
- » Looking at the potential Greenland travellers in Scandinavia, the Globetrotters with a share of 35% are dominating. Second come the Sightseers with 18%. All other segments have shares of 8% and below. Compared with the population, this means that there are more Globetrotters and less Sightseers within the potential travellers to Greenland.
- » Looking at the differences between the three markets, you find that they are very much alike regarding the structure of the segments. The only slight difference you find is that there is a smaller share of the cultural segments in Sweden than in the other markets.

- » The Visit Greenland segmentation approach is on the one hand very helpful to further understand the potential Greenland travellers in Scandinavia in total and the other three individual 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 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 Visit Greenland segments in Scandinavia in Annex of this report.



6. Reasons against/pro travelling to Greenland

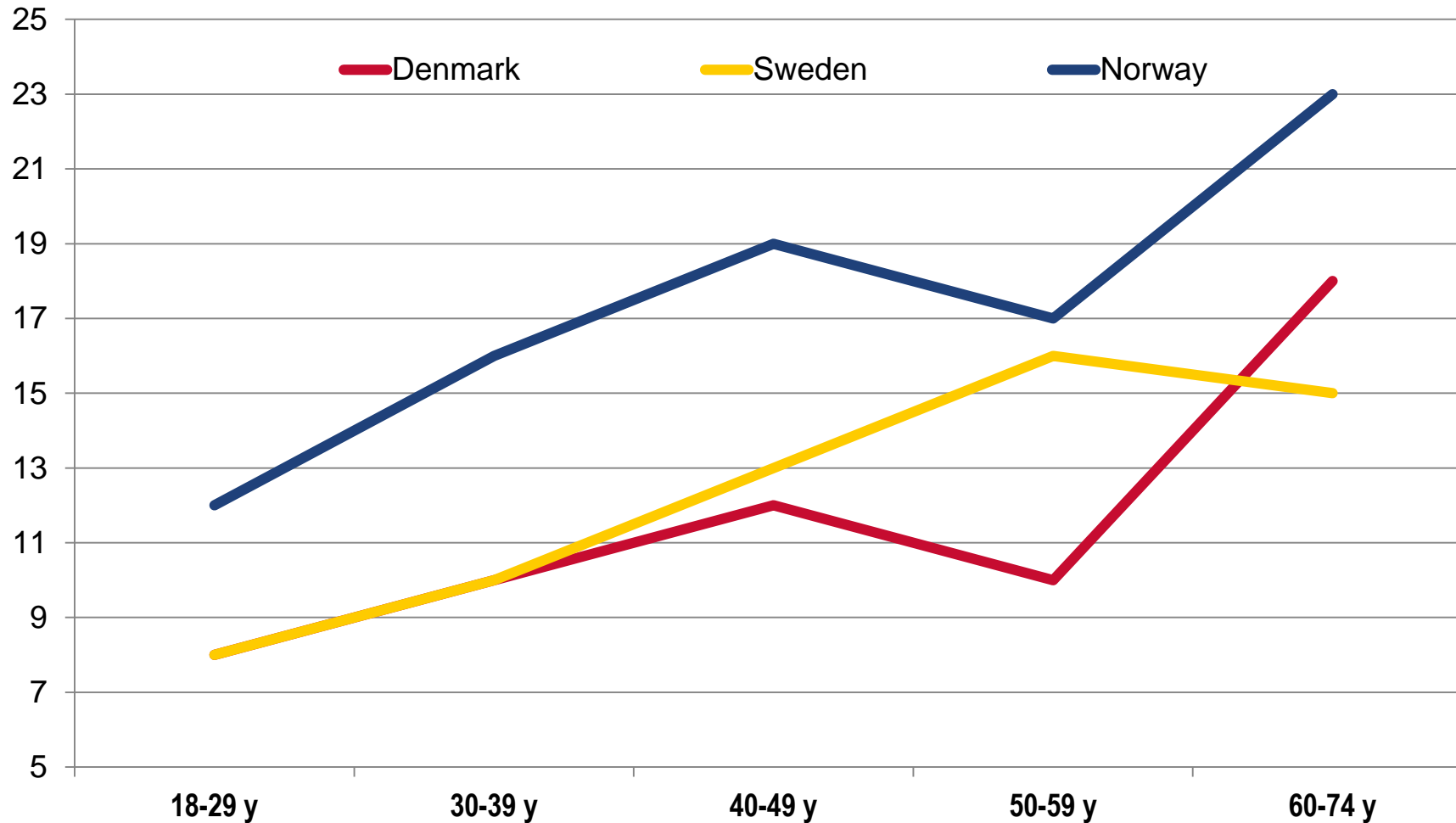
Reasons against travelling to Greenland (*population*)



- » One of the final questions in the survey is dealing with possible reasons against travelling to Greenland.
- » The good news first: 14% of the Scandinavian have no general objections to travel to Greenland.
- » Most important reasons against travelling to Greenland are the expected high costs, followed by the coldness, poor accessibility and bad weather.
- » In Denmark, the high costs are dominating as in no other market.
- » Also the other differences between the markets are interesting and can help addressing them individually.
- » There are also important factors in place, that are not directly linked to the tourism offer in Greenland (marked grey).

Q10: *What are in your opinion reasons against travelling to Greenland?*
 Basis: All respondents in Scandinavia (DK, SE, NO) (n=6,000), in Denmark (n=2000), Sweden (n=2000), Norway (n=2000);
 Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

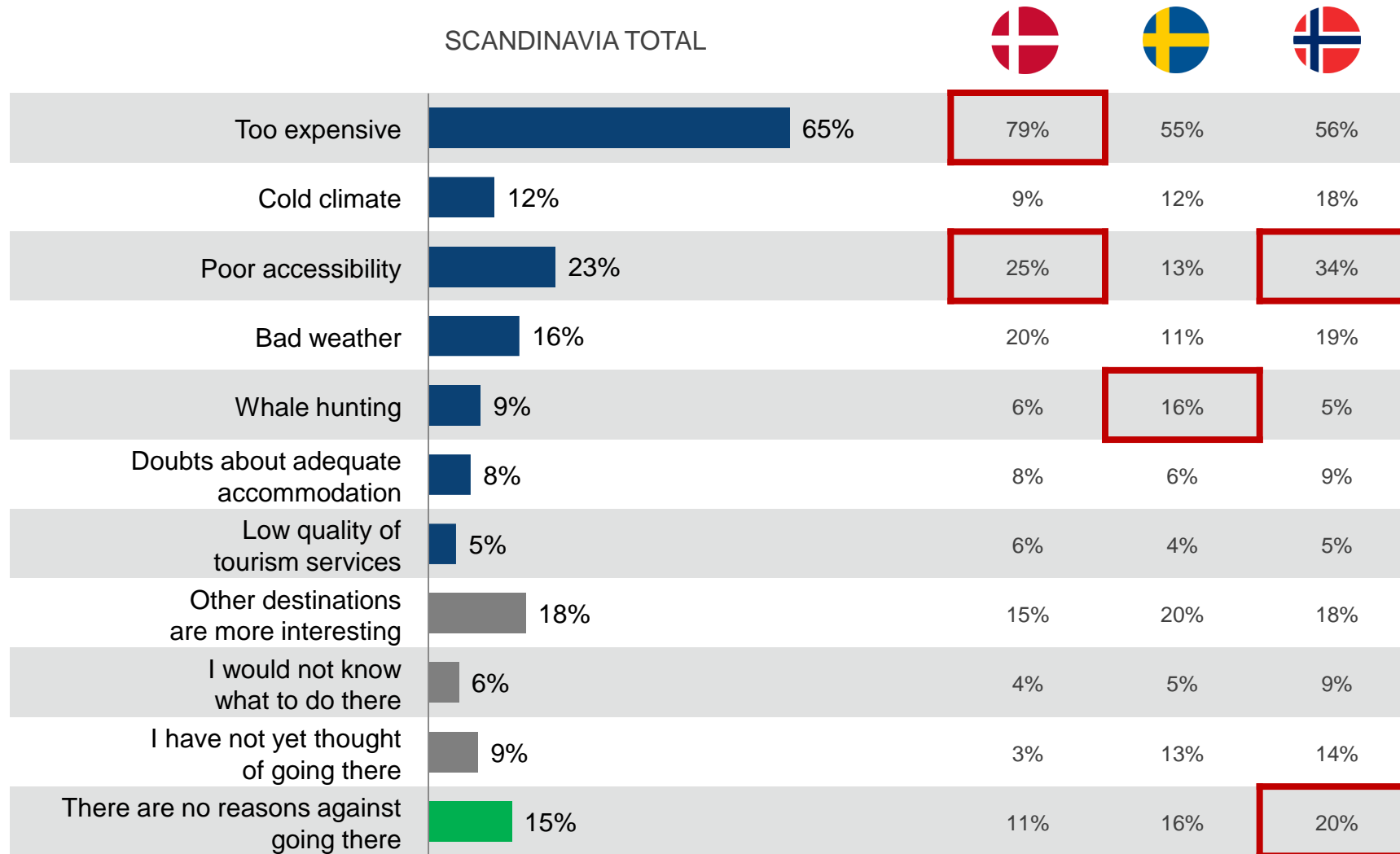
Share of people with NO objections against travelling to Greenland in different age groups (*population*)



- » As seen on the previous slide, there are differences between the three markets regarding the share of persons with NO objections to travel to Greenland – this share is highest in Norway and lower in Denmark and Sweden.
- » Within the markets there are differences regarding this topic regarding age.
- » Generally, the share of younger people with NO objections is smaller than the share of older people with NO objections.

Q10: *What are in your opinion reasons against travelling to Greenland?*
Basis: All respondents in Scandinavia (DK, SE, NO) (n=6,000), in Denmark (n=2000), Sweden (n=2000), Norway (n=2000);
Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

Reasons against travelling to Greenland (potential travellers to Greenland)



- » Even more important than knowing reasons against Greenland in the population is knowing the possible barriers for the potential Greenland guests.
- » Here we see 15% of the potential Greenland travellers in Scandinavia with no objections. Compared to the population that means, wanting to go to Greenland does not make you blind regarding the barriers.
- » This is most true regarding the “too expensive”, where the figures are much higher than in the population.
- » The other main barrier seems to be accessibility (mainly in Norway and Denmark). Whale hunting seems to touch a certain nerve in Sweden.
- » On the other hand, there are only very few doubts about the quality of the tourism service and infrastructure in Greenland.

Q10: What are in your opinion reasons against travelling to Greenland?
 Basis: Potential travellers to Greenland from Scandinavia (DK, SE, NO; n=1,147), Denmark (n=576), Sweden (n=282) and Norway (n=352); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

Reasons that could eventually make them you to Greenland after all (persons without interest to travel to Greenland)



- » To have more information about how to eventually increase the interest to travel to Greenland, we asked the persons WITHOUT interest to travel to Greenland in the next 5 years an open question: “What could make you actually consider Greenland as a holiday destination for yourself in the future?”
- » Here we find again the dominance of the price (e.g. “if it would be cheaper”).
- » Also important are information (e.g. “I would need more information about Greenland”), the product (e.g. “the right offer to experience the nature there), and the accessibility (e.g. “direct flights”).
- » All other aspects only play a very minor role.

Q11: Please think about Greenland again: What could make you actually consider Greenland as a holiday destination for yourself in the future?

Basis: All respondents in Scandinavia (DK, SE, NO) without interest to travel to Greenland in the next 5 years (n=4,853), Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

To learn 6: Reasons against travelling to Greenland

- » 14% of the Scandinavian have no general objections to travel to Greenland. Most important reasons against travelling to Greenland are the expected high costs, followed by the coldness, poor accessibility and bad weather. In Denmark, the high costs are dominating as in no other market. There are also important factors in place, that are not directly linked to the tourism offer in Greenland.
- » In all three markets, the share of younger people with NO objections is smaller than the share of older people with NO objections.
- » We see 15% of the potential Greenland travellers in Scandinavia with no objections. Compared to the population that means, wanting to go to Greenland does not make you blind regarding the barriers. This is most true regarding the “too expensive”, where the figures are much higher than in the population. The other main barrier seems to be accessibility (mainly in Norway and Denmark). Whale hunting seems to touch a certain nerve in Sweden. On the other hand, there are only very few doubts about the quality of the tourism service and infrastructure in Greenland.
- » To have more information about how to eventually increase the interest to travel to Greenland, we asked the persons WITHOUT interest to travel to Greenland in the next 5 years an open question: “What could make you actually consider Greenland as a holiday destination for yourself in the future?” Here we find again the dominance of the price (e.g. “if it would be cheaper”). Also important are information (e.g. “I would need more information about Greenland”), the product (e.g. “the right offer to experience the nature there), and the accessibility (e.g. “direct flights”). All other aspects only play a very minor role.

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

7. Competitive situation for Greenland

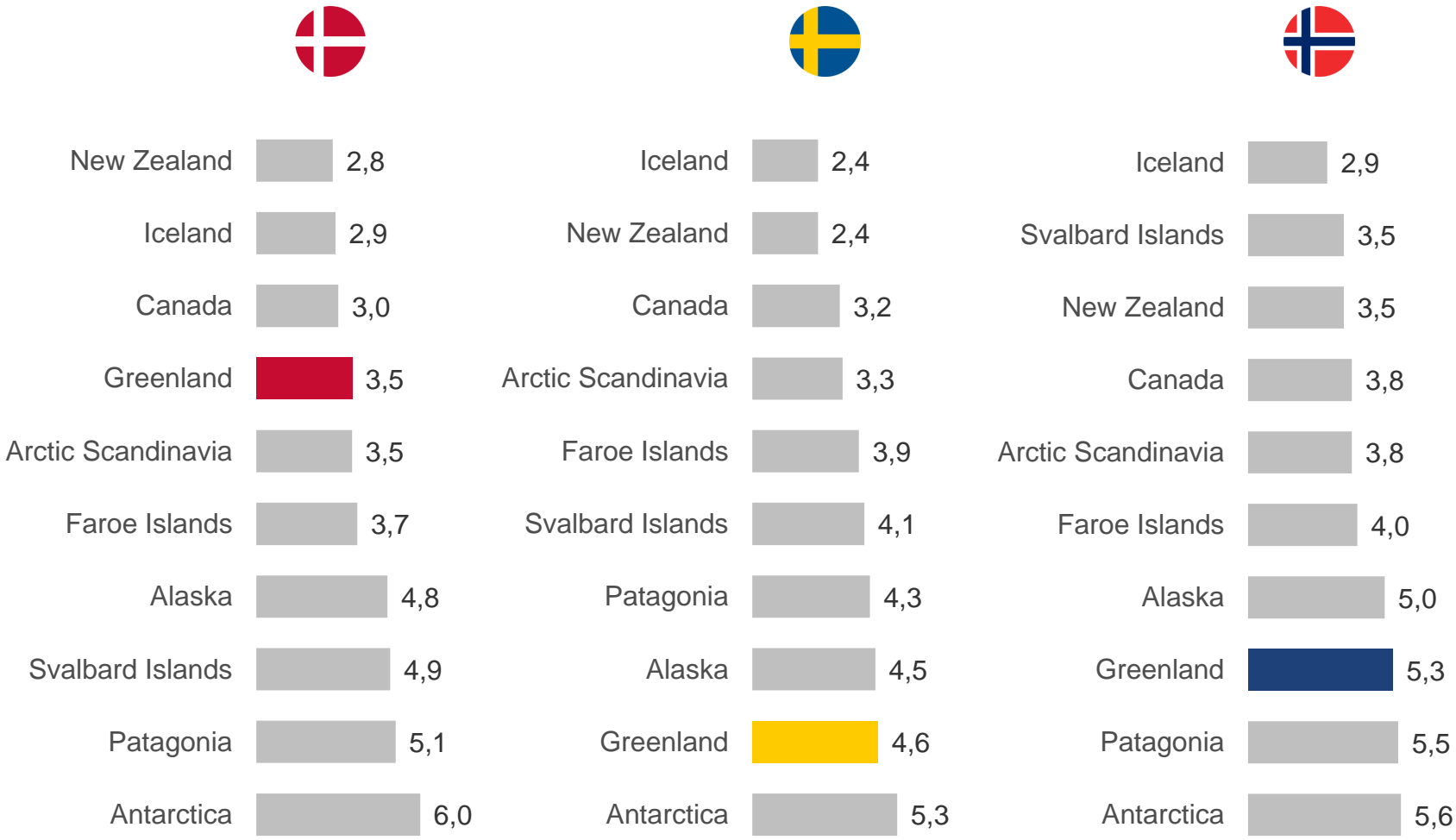


Competition analysis of Greenland on the Scandinavian market

- » With this chapter, we look at the competitive situation of Greenland on the Scandinavian markets from different points of view.
- » First of all we will take the perspective of the three individual markets Denmark, Sweden and Norway rather than taking the total Scandinavia perspective. This is due to the fact that the individual markets are quite different from each other, especially in the positioning of the different remote destinations (see chapter 1).
- » At first we will analyse, how “exchangeable/unique” Greenland is in these markets compared with its competitors. This gives an overview about the “fierceness” of the competition that Greenland is facing in the three markets compared with other remote destinations.
- » Secondly, we will look in detail, what other destinations the potential travellers to Greenland are generally interested in, where are they almost definitely planning to go in the next 2 years, and where they have been in the past. This provides you with a detailed analysis of the competitive situation that Greenland is facing in each of the markets.
- » Thirdly, we show the images for the three destinations Greenland, Iceland and Arctic Scandinavia. This enables you to find competitive advantages of Greenland over these two main competitors but also determine where the others have a competitive advantage over Greenland.
- » **In addition to these findings, you find in the annex an analysis of the product expectations in the three markets regarding travelling and planning trips to Greenland, Iceland and Arctic Scandinavia. This helps you to further refine your marketing in the light of the competitive situation of Greenland in the Scandinavian markets.**

Competition: How 'exchangeable' are the remote destinations in the three Scandinavian markets

Persons interested to travel in the next 5 years to ...




'Exchangeability' =
 Number of alternative remote destinations [Basis: Interest for the 9 other destinations] among persons interested in those 10 destinations

- » The Danes, Swedes and Norwegians are interested in various of the remote destinations. They are 'multi-optional' and thus open to different possibilities for realising their holiday needs.
- » As a result, destinations are somewhat '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 there are differences between the markets: For Greenland, the figure differs between 3.5 competitors in Denmark and 5.3 competitors in Norway.
- » This shows that Greenland is facing a fierce competition with the other nine destinations in our set of remote destinations, a bit less in Denmark, a bit more in the other two markets

Q2a: Now we are talking about remote travel destinations. Which of these destinations would you like to visit within the next 5 years?
 Basis: All respondents in Denmark (n=2000), Sweden (n=2000), Norway (n=2000); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

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

 Potential travellers to Greenland ...	... would also like to visit within the next 5 years	... are almost definitely planning to visit within the next 2 years	... have already visited for a holiday in the past
Greenland	100%	9%	15%
Iceland	68%	17%	20%
New Zealand	54%	6%	8%
Canada	52%	8%	15%
Faroe Islands	50%	8%	14%
Arctic Scandinavia	38%	8%	21%
Svalbard Islands	28%	3%	3%
Alaska	27%	1%	1%
Patagonia	18%	1%	1%
Antarctica	11%	0.3%	0.3%

- » In Denmark, potential travellers to Greenland are also interested in 3.5 other remote destinations in our question set.
- » The fiercest competitor is by far Iceland. 68% of the potential Greenland travellers also want to go there.
- » It is followed by New Zealand, Canada, Faroe Islands and Arctic Scandinavia.
- » Looking further into the details, there is a high likelihood that the potential Greenland travellers end up in Iceland and Arctic Scandinavia (and to a lesser extent in Canada and Faroe Islands) before they actually travel to Greenland.

Q2: Now we are talking about remote travel destinations. Which of these destinations would you like to visit within the next 5 years? And which of these travel destinations are you almost definitely planning to visit within the next 2 years? And which of these destinations have you already visited for a holiday in the past?

Basis: Potential travellers to Greenland from Denmark (n=576); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

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

 Potential travellers to Greenland ...	... would also like to visit within the next 5 years	... are almost definitely planning to visit within the next 2 years	... have already visited for a holiday in the past
Greenland	100%	10%	3%
Iceland	78%	34%	22%
New Zealand	64%	13%	6%
Faroe Islands	57%	7%	3%
Canada	55%	11%	11%
Svalbard Islands	52%	7%	3%
Arctic Scandinavia	46%	17%	29%
Alaska	40%	1%	2%
Antarctica	36%	1%	0.1%
Patagonia	27%	2%	2%


- » In Sweden, potential travellers to Greenland are also interested in 4.7 other remote destinations in our question set.
- » The fiercest competitor is by far Iceland. 78% of the potential Greenland travellers also want to go there.
- » It is followed by New Zealand, Faroe Islands, Canada, Svalbard Islands and Arctic Scandinavia.
- » Looking further into the details, there is a high likelihood that the potential Greenland travellers end up in Iceland and Arctic Scandinavia (and to a lesser extent in Canada and New Zealand) before they actually travel to Greenland.

Q2: Now we are talking about remote travel destinations. Which of these destinations would you like to visit within the next 5 years? And which of these travel destinations are you almost definitely planning to visit within the next 2 years? And which of these destinations have you already visited for a holiday in the past?

Basis: Potential travellers to Greenland from Sweden (n=282); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat



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

 Potential travellers to Greenland ...	... would also like to visit within the next 5 years	... are almost definitely planning to visit within the next 2 years	... have already visited for a holiday in the past
Greenland	100%	5%	3%
Iceland	79%	28%	34%
Svalbard Islands	77%	16%	23%
Faroe Islands	70%	10%	9%
Canada	62%	8%	17%
New Zealand	57%	6%	6%
Alaska	55%	3%	2%
Arctic Scandinavia	48%	20%	42%
Antarctica	39%	1%	2%
Patagonia	38%	1%	2%

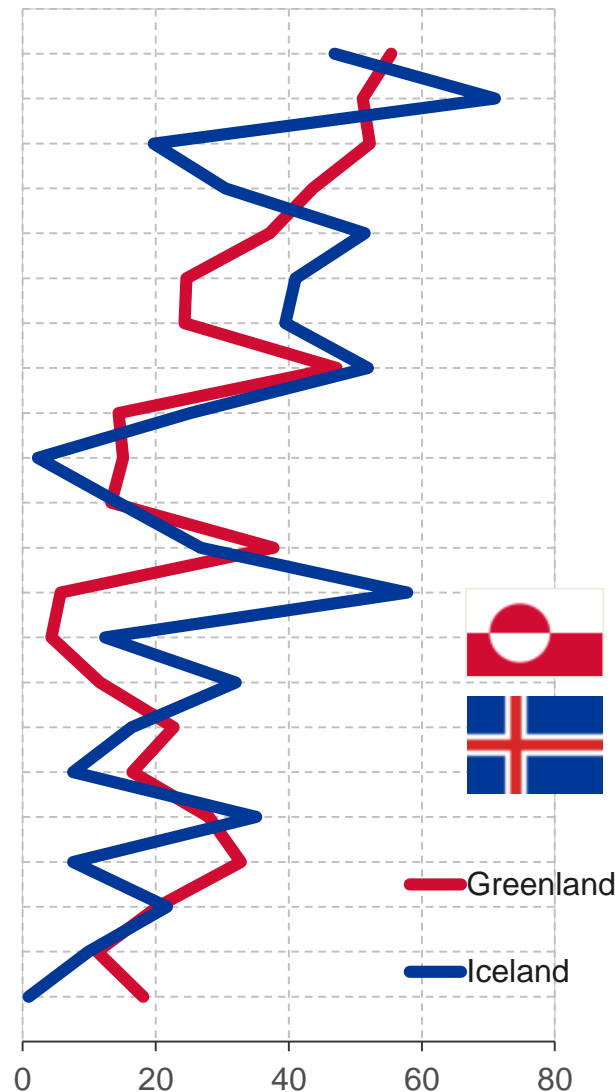
- » In Norway, potential travellers to Greenland are also interested in 5.3 other remote destinations in our question set.
- » The fiercest competitors are Iceland and Svalbard Islands. 79% resp. 77% of the potential Greenland travellers also want to go there.
- » These are followed by Faroe Islands, Canada and New Zealand.
- » Looking further into the details, there is a high likelihood that the potential Greenland travellers end up in Iceland, Arctic Scandinavia and Svalbard Islands (and to a lesser extent in Faroe Islands, Canada and New Zealand) before they actually travel to Greenland.

Q2: Now we are talking about remote travel destinations. Which of these destinations would you like to visit within the next 5 years? And which of these travel destinations are you almost definitely planning to visit within the next 2 years? And which of these destinations have you already visited for a holiday in the past?

Basis: Potential travellers to Greenland from Norway (n=352); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

Image of Greenland and Iceland in Scandinavia

unspoiled nature
 stunning scenery
 not too touristic
 place to find quietness
 new and unexpected experiences
 must-see destination
 interesting culture and history
 special natural phenomena
 hospitable people
 see the Arctic before the ice melts
 a place to feel free
 opportunities for wildlife viewing
 opportunities for wellness
 delicious local cuisine
 great variety of summer outdoor activities
 great variety of snow activities
 experience the traditional way of life
 expensive destination
 difficult to reach
 changeable weather
 only suitable for travel during the summer
 burdened with social problems

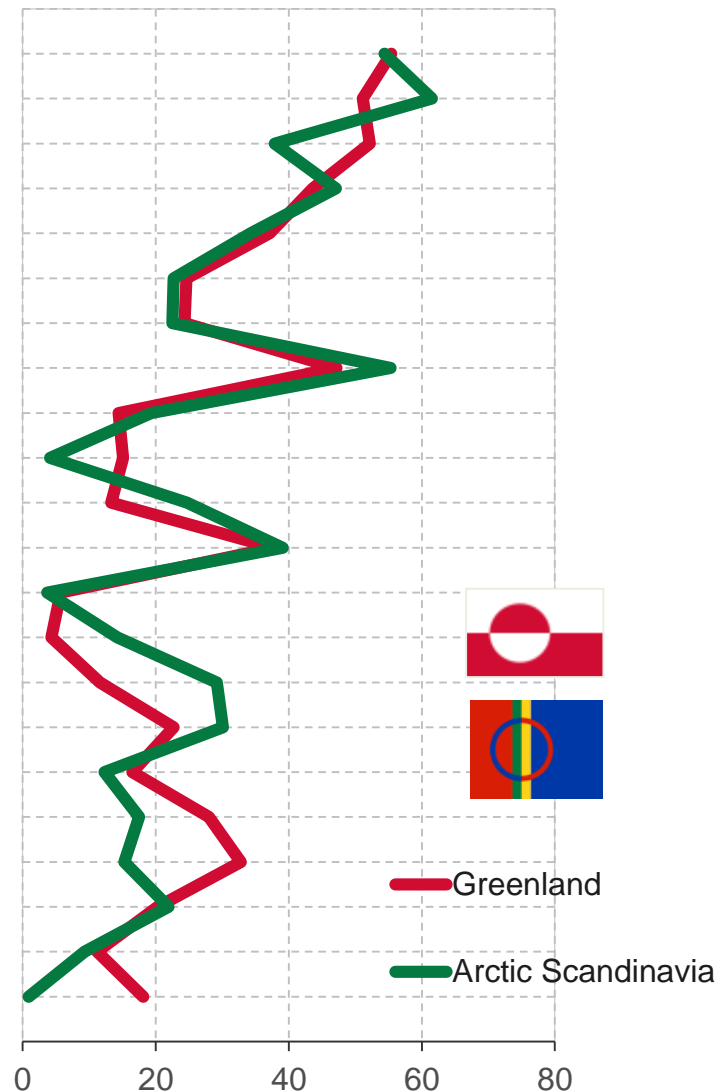


- » In the questionnaire in Scandinavia, we not only asked for the image of Greenland, but also for the images of Iceland and Arctic Scandinavia.
- » Comparing the images of Greenland and Iceland, we can observe the top characteristics being the same: “Stunning scenery” and “Unspoiled nature”, but there are also significant differences.
- » **More characteristic for Greenland than for Iceland:**
 - » Not too touristic (+33%-pts.)
 - » Difficult to reach (+25%-pts.)
 - » Social problems (+17%-pts.)
 - » Quietness (+13%-pts.)
- » **More characteristic for Iceland than for Greenland:**
 - » Wellness (+52%-pts.)
 - » Summer activities (+20%-pts.)
 - » Stunning scenery (+20%-pts.)
 - » Must-see destination (+16%-pts.)

Q3: Please tell me which of these characteristics do you think particularly apply to Greenland/Iceland?
 Basis: All respondents in Scandinavia (DK, SE, NO) (n=6,000);
 Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

Image of Greenland and Arctic Scandinavia in Scandinavia

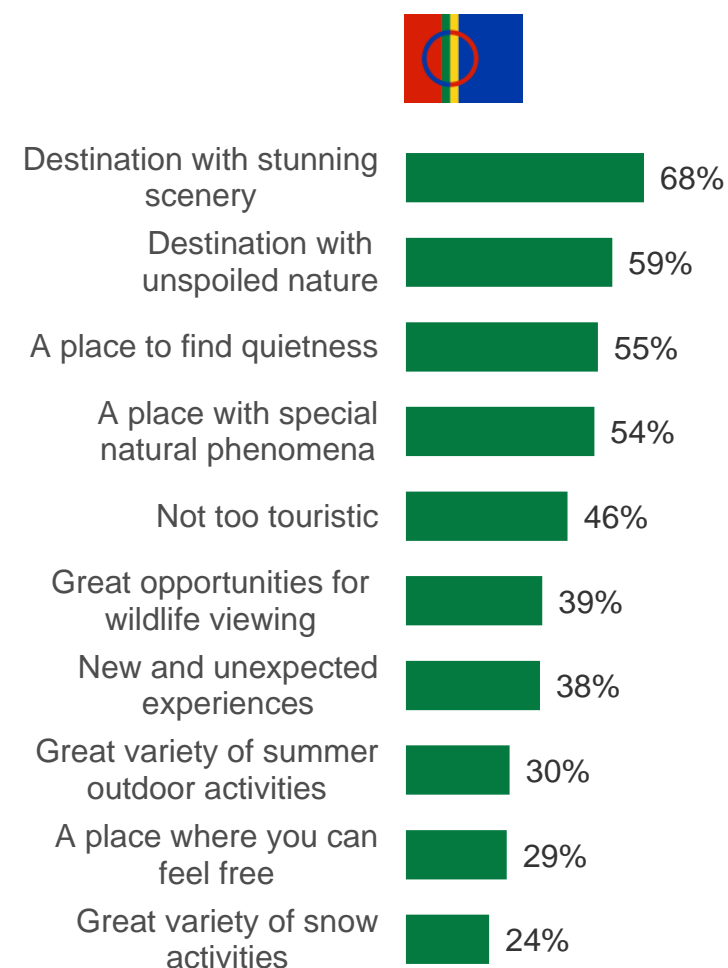
unspoiled nature
 stunning scenery
 not too touristic
 place to find quietness
 new and unexpected experiences
 must-see destination
 interesting culture and history
 special natural phenomena
 hospitable people
 see the Arctic before the ice melts
 a place to feel free
 opportunities for wildlife viewing
 opportunities for wellness
 delicious local cuisine
 great variety of summer outdoor activities
 great variety of snow activities
 experience the traditional way of life
 expensive destination
 difficult to reach
 changeable weather
 only suitable for travel during the summer
 burdened with social problems



- » In the questionnaire in Scandinavia, we not only asked for the image of Greenland, but also for the images of Iceland and Arctic Scandinavia.
- » Comparing the images of Greenland and Arctic Scandinavia, we can observe the top characteristics being the same: “Stunning scenery” and “Unspoiled nature”, but there are also smaller differences.
- » **More characteristic for Greenland than for Arctic Scandinavia:**
 - » Difficult to reach (+18%-pts.)
 - » Social problems (+17%-pts.)
 - » Not too touristic (+14%-pts.)
 - » Expensive (+11%-pts.)
- » **More characteristic for Arctic Scandinavia than for Greenland:**
 - » Summer activities (+18%-pts.)
 - » Feel free (+11%-pts.)
 - » Stunning scenery (+10%-pts.)
 - » Delicious cuisine (+10%-pts.)

Q3: Please tell me which of these characteristics do you think particularly apply to Greenland/Arctic Scandinavia?
 Basis: All respondents in Scandinavia (DK, SE, NO) (n=6,000);
 Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

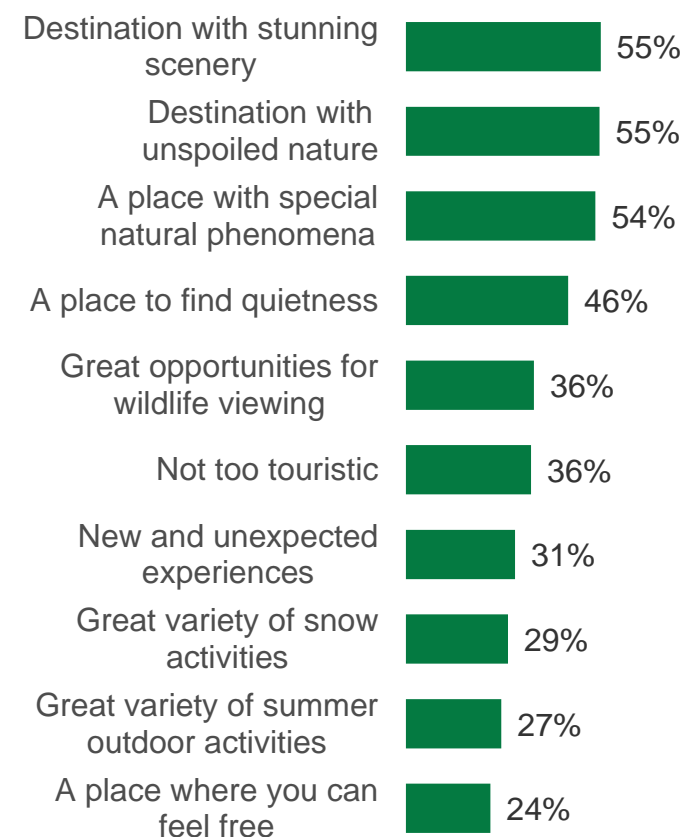
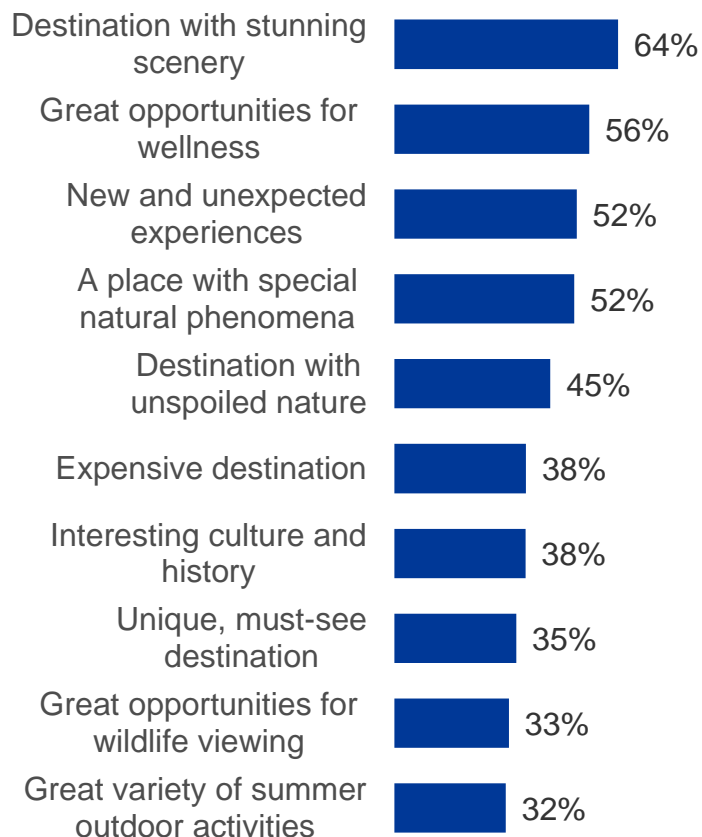
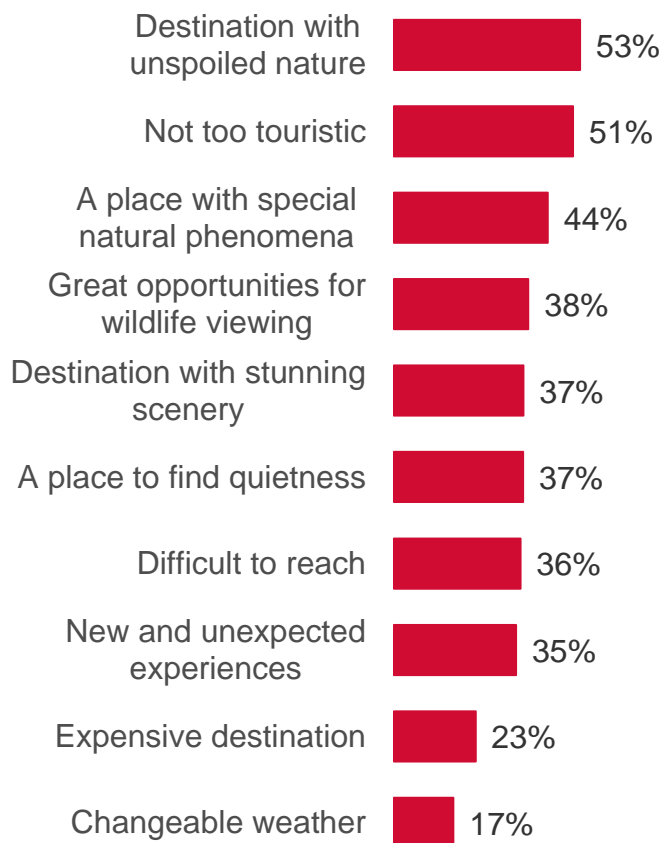
TOP10 image characteristics of Greenland, Iceland and Arctic Scandinavia in DENMARK



Q3: Please tell me which of these characteristics do you think particularly apply to Greenland/Iceland/Arctic Scandinavia?
 Basis: All respondents in Denmark (n=2000), Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat



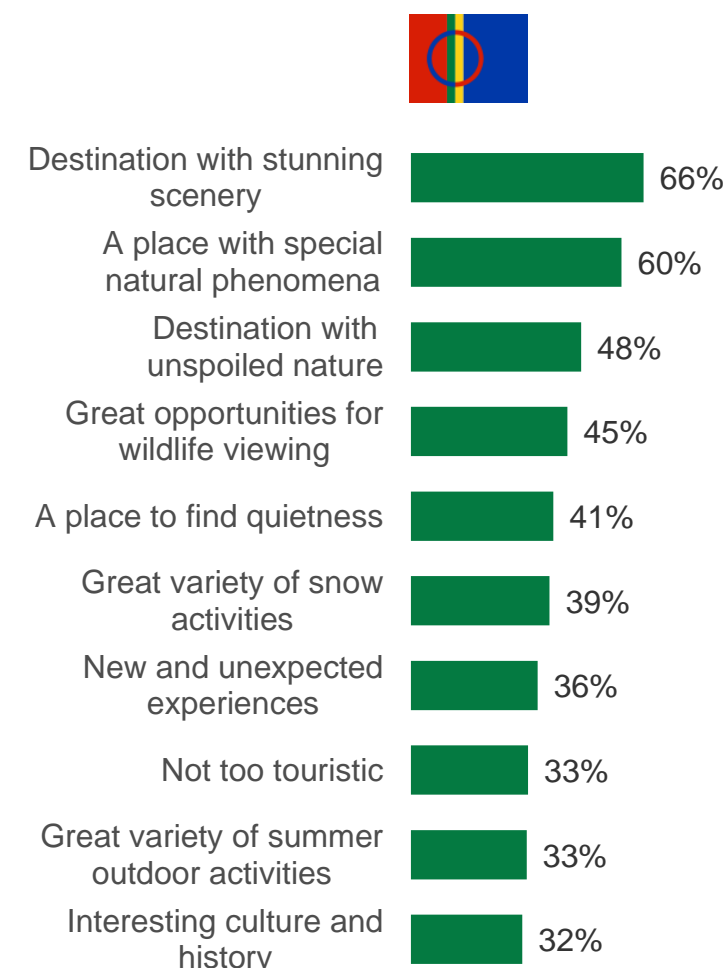
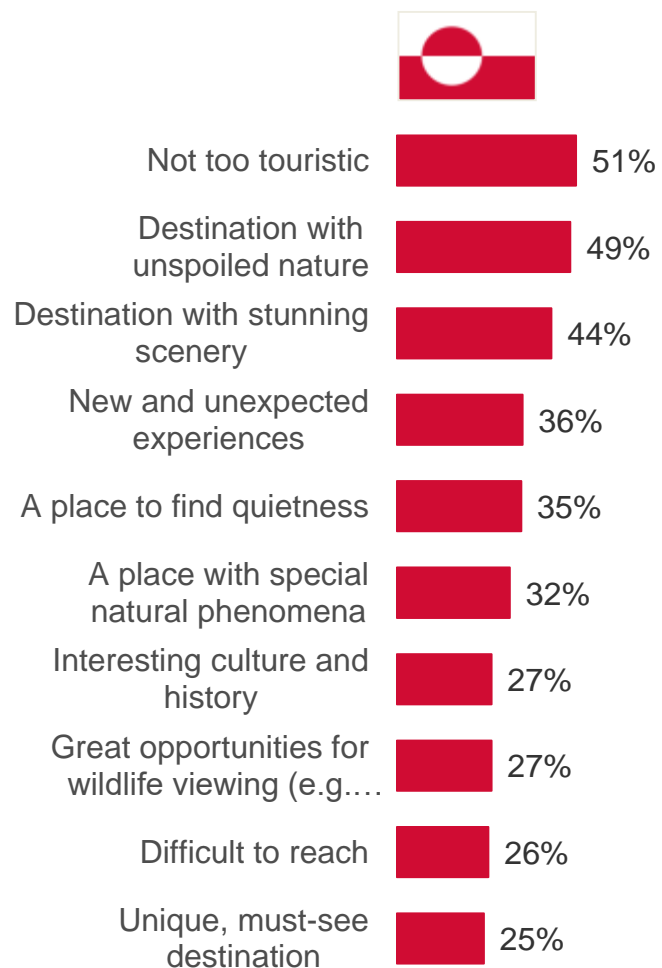
TOP10 image characteristics of Greenland, Iceland and Arctic Scandinavia in SWEDEN



Q3: Please tell me which of these characteristics do you think particularly apply to Greenland/Iceland/Arctic Scandinavia?
 Basis: All respondents in Sweden (n=2000), Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat



TOP10 image characteristics of Greenland, Iceland and Arctic Scandinavia in NORWAY



Q3: Please tell me which of these characteristics do you think particularly apply to Greenland/Iceland/Arctic Scandinavia?
 Basis: All respondents in Norway (n=2000); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

To learn 7: Competitive situation for Greenland

Competition:

- » The Danes, Swedes and Norwegians are interested in various of the remote destinations. They are 'multi-optional' and thus open to different possibilities for realising their holiday needs. As a result, destinations are somewhat '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 there are differences between the markets: For Greenland, the figure differs between 3.5 competitors in Denmark and 5.3 competitors in Norway. This shows that Greenland is facing a fierce competition with the other nine destinations in our set of remote destinations, a bit less in Denmark, a bit more in the other two markets.
- » In Denmark, the fiercest competitor is by far Iceland. 68% of the potential Greenland travellers also want to go there. It is followed by New Zealand, Canada, Faroe Islands and Arctic Scandinavia.
- » In Sweden, the fiercest competitor is by far Iceland. 78% of the potential Greenland travellers also want to go there. It is followed by New Zealand, Faroe Islands, Canada, Svalbard Islands and Arctic Scandinavia.
- » In Norway, the fiercest competitor are Iceland and Svalbard Islands. 79% resp. 77% of the potential Greenland travellers also want to go there.
- » These are followed by Faroe Islands, Canada and New Zealand.

Image benchmarking

- » Comparing the images of Greenland and Iceland, we can observe the top characteristics being the same: "Stunning scenery" and "Unspoiled nature", but there are also significant differences.
- » **More characteristic for Greenland than for Iceland:** Not too touristic, difficult to reach, Social problems, Quietness
- » **More characteristic for Iceland than for Greenland:** Wellness, summer activities, stunning scenery, must-see destination.
- » Comparing the images of Greenland and Arctic Scandinavia, we can observe the top characteristics being the same: "Stunning scenery" and "Unspoiled nature", but there are also smaller differences.
- » **More characteristic for Greenland than for Arctic Scandinavia:** Difficult to reach, social problems, not too touristic, expensive.
- » **More characteristic for Arctic Scandinavia than for Greenland:** Summer activities, feel free, stunning scenery, delicious cuisine

- » The results show that Greenland is in a fierce competition with other (remote) destinations around the world.
- » The image benchmarking shows the similarities and differences of Greenland and its top competitors on the Scandinavian markets
- » In the Annex, you also find an overview on the product requirements in the three markets regarding Greenland, Iceland and Arctic Scandinavia.

8. Main conclusions and discussion points



Main conclusions and discussion points: Total Scandinavia

» **Huge potential in Scandinavia:**

Compared to the actual visitor numbers, Greenland has a huge volume of potential guest in Scandinavia. This is where destination marketing comes in. The potentials for Greenland are very different in the three markets, with Denmark being by far the most important.

» **Expectations 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 in product development:**

For the overall Scandinavian market, we see the expected dominance of nature based products. Nevertheless, there are peculiarities of the three markets that can be used for specialisation, e.g. dog-sledding in Denmark and cultural experiences in Norway.

» **Potential of combined Iceland-Greenland trips:**

As most people in Scandinavia prefer direct flight to Greenland, there seems to be limited potential for this offer. Again this differs between the markets. For Denmark with its clear image of Greenland and the great accessibility there seems to be no need for this, in Sweden on the other hand, with their limited knowledge about Greenland, combined trips of Iceland and Greenland might be a door opener into this market.

» **Internet search engines and destination websites are the most important sources of information in Scandinavia:**

While this is true for all the three markets, there are differences between them as well: Denmark is preferring more personal relations, guide books and travel agents, Sweden magazines and newspaper and Norway all kinds of digital sources.

» **Of course there are also some barriers and general challenges on the three markets:**

The competition with other remote destinations is fierce in all the three markets, a bit less in Denmark, a bit more in the other two. This 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. On the positive side, very few have the perception of poor service and quality of accommodation.

Altogether, these conclusions for Scandinavia fit well with what we have observed when analysing Germany, Great Britain, the USA and France.

Nevertheless, all markets have their peculiarities and should be looked upon individually!

In Scandinavia, it even makes sense to look at the three markets Denmark, Sweden and Norway individually!

Main conclusions and discussion points: Per market



- » Denmark is by far the biggest market for Greenland in Scandinavia.
- » The special relation between Denmark and Greenland is shown in the fact that almost 30% of the potential travellers have personal ties to Greenland.
- » The Danish are the most knowledgeable of the three markets. They appreciate the variety of tourism offer in Greenland, without turning a blind eye to the challenging aspects.
- » They also clearly know what to expect: It is mostly nature experiences. Especially dog-sledding is much more popular for the Danish than for the Swedes and Norwegians.
- » When looking for travel information to Greenland, the Danish are more than the other two markets relying on personal relations, guide books and travel agents.
- » The competitive situation of Greenland is less fierce in Denmark than in the other markets.



- » Sweden is the second biggest market in Scandinavia, mainly due to the fact of its much bigger total population, the share of persons interested to travel to Greenland is the smallest of the three markets.
- » Concerning the image and expectations, the Swedish are looking for scenery and nature experiences as do the other markets. It seems to be that they are the least knowledgeable of the three markets.
- » Compared to Denmark, they are more into culinary experiences, compared to Norway they are more into glacier hiking.
- » Regarding their information preferences, they are much more into print (magazines and newspapers) than the other two markets.
- » Whale hunting is for them the second biggest barrier after the price issue.
- » Greenland is in a fierce competitive situation in Sweden – its main competitors being Iceland and Arctic Scandinavia.



- » Norway is the smallest market by volume, but with a quite high share of potential travellers to Greenland. This together with the high income level of Norway makes it an attractive market.
- » Concerning the image and expectations, Norwegians seem to be more knowledgeable than the Swedish.
- » They also have slightly different product expectations: Even though nature is dominating, the Norwegians are much more into cultural experiences and activities.
- » Regarding their information preferences, the Norwegians are much more into all kinds of online sources (search engines, review sites, OTAs, social media).
- » The expensive price is less of an image factor and a barrier than in Denmark.
- » Greenland is in a very fierce competitive situation in Norway – its main competitors being Iceland, Svalbard Islands and Arctic Scandinavia.



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ANNEX A1:
Detailed tabulations about the Visit Greenland segments
on the DANISH market



Visit Greenland segmentation: Denmark (interested in any of the remote destinations)

		INTEREST FOCUS			
		Culture	Culture&Nature	Nature	Personal Challenge
ENGAGEMENT LEVEL	Immersion	4% n=56* Ethnophile		1% n=16* Wilderness Seeker	
	Interaction	8% n=116 Culture Lover	34% n=505 Globetrotter	5% n=67* Nature Lover	4% n=67* Special Interest
	Observation	7% n=103 Culture Appreciator	21% n=311 Sightseer	8% n=120 Nature Appreciator	9%** 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? (Interest focus)

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? (Engagement level)

Basis: All respondents in Denmark interested to travel to any of the 10 remote destinations (n=1,491); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat



Visit Greenland segmentation: Denmark *(interested in any of the remote destinations)*

Preferred experiences



	Culture		Culture&Nature		Nature
	<i>Culture Lover</i>	<i>Culture Appreciator</i>	<i>Globetrotter</i>	<i>Sightseer</i>	<i>Nature Appreciator</i>
Stunning scenery (e.g. mountains, fjords, cliffs)	72	70	90	84	90
Natural phenomena (e.g. northern lights, midnight sun)	56	62	77	70	73
Wildlife (e.g. Whales, birds)	45	43	61	62	66
Glaciers/icebergs	55	53	62	51	63
Volcanoes/hot springs/geysers	32	42	49	49	55
New and unexpected experiences	44	42	46	42	43
Historic sights/events	49	45	42	37	19
Capitals/cities	50	54	40	36	22
Traditional villages	34	29	42	31	30
Contemporary culture/lifestyle	34	39	40	27	17

Q4: When thinking about travelling to this destination, what would you like to see/experience?

Basis: All respondents in Denmark interested to travel to any of the 10 remote destinations (n=1,491) by most important segments; definitions: see page 81

Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

Visit Greenland segmentation: Denmark *(interested in any of the remote destinations)*

Preferred activities

	Culture		Culture&Nature		Nature
	<i>Culture Lover</i>	<i>Culture Appreciator</i>	<i>Globetrotter</i>	<i>Sightseer</i>	<i>Nature Appreciator</i>
Guided nature excursions	64	57	70	71	74
Wildlife watching (e.g. whales, birds, musk ox, reindeer)	51	44	67	60	66
Hiking	43	44	69	60	66
Experience quietness	35	36	57	47	45
Eating/drinking local specialities	53	51	52	39	43
Dog-sledding	45	33	44	39	35
Swimming/wellness (e.g. in thermal baths)	33	33	41	41	45
Photography	33	31	45	28	40
Glacier hiking	36	26	41	30	34
Guided cultural tours	44	35	36	34	8
Meeting/mingling with the locals	31	29	38	22	13
Learning about local handicraft	26	18	28	17	7
Shopping for souvenirs	18	24	23	20	11
Kayaking	14	11	21	10	18
Cycling	10	13	15	12	17
Fishing	6	7	17	10	15
Horseback riding	8	9	16	11	13
Skiing	9	9	15	8	13
Hunting	3	3	6	2	3

Q5: Which of the following activities would you like to do when travelling to this destination?

Basis: All respondents in Denmark interested to travel to any of the 10 remote destinations (n=1,491) by most important segments; definitions: see page 81

Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

Visit Greenland segmentation: Denmark *(interested in any of the remote destinations)*

Preferred ways to travel to remote destinations

	Culture		Culture&Nature		Nature
To get there and back:	<i>Culture Lover</i>	<i>Culture Appreciator</i>	<i>Globetrotter</i>	<i>Sightseer</i>	<i>Nature Appreciator</i>
Plane: Direct flight to the destination	91	87	92	89	85
Plane: Round trip combining multiple countries	20	18	21	20	20
Cruise: Start/End in Scandinavia/Continental Europe	14	20	12	15	11
Cruise: Start/End in Greenland/Iceland	9	13	15	10	12
Cruise: Transatlantic	7	11	8	9	4
At the destination:					
Stay at one location	44	42	31	35	29
Stay at multiple locations	68	63	72	69	64
Excursions to one of the other countries (e.g. from Iceland to Greenland)	9	15	14	15	11
Organisation:					
Package/tour operator	52	55	51	61	50
Self	64	50	61	45	53

Q6: How would you like to travel to this destination?

Basis: All respondents in Denmark interested to travel to any of the 10 remote destinations (n=1,491) by most important segments; definitions: see page 81

Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat



Visit Greenland segmentation: Denmark *(interested in any of the remote destinations)*

Preferred sources of inspiration and information when travelling to remote destinations



	Culture		Culture&Nature		Nature
	<i>Culture Lover</i>	<i>Culture Appreciator</i>	<i>Globetrotter</i>	<i>Sightseer</i>	<i>Nature Appreciator</i>
Internet search engine	89	84	82	79	84
Personal relations (friend, family, co-worker)	53	53	59	49	44
Destination websites (e.g. visitgreenland.com, visiticeland.com)	60	43	59	49	49
Guide book	41	31	55	43	29
Travel agent	31	34	43	49	45
Holiday review websites (e.g. TripAdvisor)	36	32	39	29	25
Books/literature	44	21	39	26	19
Travel magazine	21	11	24	16	23
Social media (e.g. Facebook, Instagram, Twitter)	24	25	18	16	10
Previous personal knowledge	16	22	16	14	12
Online booking agent (e.g. Expedia, booking.com)	20	19	19	14	7
Newspaper	10	6	9	8	5

Q7: When thinking about travelling to this destination, how would you like to look for inspiration/information for this trip?

Basis: All respondents in Denmark interested to travel to any of the 10 remote destinations (n=1,491) by most important segments; definitions: see page 81

Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat



Visit Greenland segmentation: Denmark *(interested in any of the remote destinations)*

Preferred online content when looking for information about remote travel destinations



	Culture		Culture&Nature		Nature
	<i>Culture Lover</i>	<i>Culture Appreciator</i>	<i>Globetrotter</i>	<i>Sightseer</i>	<i>Nature Appreciator</i>
Pictures of the destination, its natural/cultural attractions	73	71	75	75	74
Pictures of accommodations/activities/tours	66	71	72	65	62
Texts on how to get there/get around, where to stay, to eat & go shopping	74	61	73	68	53
Texts from other travellers with recommendations what do there	67	47	60	59	37
Contact options, where to find specific information/ travel offers	42	34	49	45	44
Videos of nature/landscapes incl. natural phenomena	24	28	39	39	45
Texts with stories by locals about their daily life/culture	36	32	38	31	15
Videos about local cultural traditions/lifestyle/art	17	27	24	19	9
Destination companies' newsletters	11	8	19	13	9
Social media posts/stories	10	16	13	15	9

Q8: Which kind of content do you like to find when looking for online information about this destination?

Basis: All respondents in Denmark interested to travel to any of the 10 remote destinations (n=1,491) by most important segments; definitions: see page 81

Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

ANNEX A2:
Detailed tabulations about the Visit Greenland segments
on the SWEDISH market

 Visit Greenland segmentation:
Sweden (interested in any of the remote destinations)

		INTEREST FOCUS			
		Culture	Culture&Nature	Nature	Personal Challenge
ENGAGEMENT LEVEL	Immersion	1% n=19* Ethnophile		0% n=2* Wilderness Seeker	
	Interaction	6% n=106 Culture Lover	29% n=491 Globetrotter	7% n=125 Nature Lover	5% n=93 Special Interest
	Observation	5% n=84 Culture Appreciator	21% n=354 Sightseer	9% n=148 Nature Appreciator	18%** 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? (Interest focus)

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? (Engagement level)

Basis: All respondents in Sweden interested to travel to any of the 10 remote destinations (n=1,724); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat



Visit Greenland segmentation: Sweden *(interested in any of the remote destinations)*

Preferred experiences



	Culture		Culture&Nature		Nature		Special Interest
	<i>Culture Lover</i>	<i>Culture Appreciator</i>	<i>Globetrotter</i>	<i>Sightseer</i>	<i>Nature Lover</i>	<i>Nature Appreciator</i>	
Stunning scenery <small>(e.g. mountains, fjords, cliffs)</small>	67	72	83	80	79	78	75
Volcanoes/hot springs/geysers	61	55	63	62	63	65	48
Natural phenomena <small>(e.g. northern lights, midnight sun)</small>	53	50	60	55	54	63	58
Wildlife <small>(e.g. Whales, birds)</small>	38	37	61	52	56	56	60
Glaciers/icebergs	31	39	50	43	48	43	43
New and unexpected experiences	36	34	51	38	38	34	38
Historic sights/events	36	44	41	43	29	29	31
Capitals/cities	50	50	38	39	29	30	27
Traditional villages	28	23	42	29	32	28	27
Contemporary culture/lifestyle	31	19	22	17	9	10	10

Q4: When thinking about travelling to this destination, what would you like to see/experience?

Basis: All respondents in Sweden interested to travel to any of the 10 remote destinations (n=1,724) by most important segments; definitions: see page 88

Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat



Visit Greenland segmentation: Sweden *(interested in any of the remote destinations)*

Preferred activities



	Culture		Culture&Nature		Nature		Special Interest
	Culture Lover	Culture Appreciator	Globetrotter	Sightseer	Nature Lover	Nature Appreciator	
Guided nature excursions	55	59	66	70	54	67	58
Wildlife watching (e.g. whales, birds, musk ox, reindeer)	43	39	64	56	59	62	64
Swimming/wellness (e.g. in thermal baths)	65	54	56	54	56	61	41
Eating/drinking local specialities	62	57	63	52	56	46	57
Hiking	37	26	61	44	65	50	45
Experience quietness	44	40	47	45	42	47	40
Photography	27	26	41	32	35	36	36
Guided cultural tours	51	52	34	39	15	16	20
Meeting/mingling with the locals	41	13	39	21	29	19	32
Glacier hiking	20	19	34	26	32	34	33
Horseback riding	28	12	31	23	33	25	20
Dog-sledding	24	13	28	19	27	29	27
Kayaking	13	7	25	11	27	20	23
Learning about local handicraft	20	10	24	17	14	14	15
Shopping for souvenirs	21	20	15	17	9	15	17
Fishing	7	6	16	9	18	11	38
Cycling	10	3	15	9	23	17	16
Skiing	8	6	13	6	8	14	27
Hunting	3	-	4	2	2	1	15

Q5: Which of the following activities would you like to do when travelling to this destination?

Basis: All respondents in Sweden interested to travel to any of the 10 remote destinations (n=1,724) by most important segments; definitions: see page 88

Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat



Visit Greenland segmentation: Sweden *(interested in any of the remote destinations)*



Preferred ways to travel to remote destinations

	Culture		Culture&Nature		Nature		Special Interest
To get there and back:	<i>Culture Lover</i>	<i>Culture Appreciator</i>	<i>Globetrotter</i>	<i>Sightseer</i>	<i>Nature Lover</i>	<i>Nature Appreciator</i>	
Plane: Direct flight to the destination	83	91	81	85	77	88	84
Plane: Round trip combining multiple countries	17	9	18	14	9	13	12
Cruise: Start/End in Scandinavia/Continental Europe	13	9	16	11	14	18	8
Cruise: Start/End in Greenland/Iceland	4	7	8	6	7	6	2
Cruise: Transatlantic	9	6	8	6	5	2	5
At the destination:							
Stay at one location	23	29	14	25	25	30	20
Stay at multiple locations	70	70	79	67	64	67	77
Excursions to one of the other countries (e.g. from Iceland to Greenland)	14	11	18	15	17	19	21
Organisation:							
Package/tour operator	48	57	53	64	39	55	51
Self	61	48	59	41	64	45	59

Q6: How would you like to travel to this destination?

Basis: All respondents in Sweden interested to travel to any of the 10 remote destinations (n=1,724) by most important segments; definitions: see page 88

Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat



Visit Greenland segmentation: Sweden *(interested in any of the remote destinations)*

Preferred sources of inspiration and information when travelling to remote destinations



	Culture		Culture&Nature		Nature		Special Interest
	<i>Culture Lover</i>	<i>Culture Appreciator</i>	<i>Globetrotter</i>	<i>Sightseer</i>	<i>Nature Lover</i>	<i>Nature Appreciator</i>	
Internet search engine	74	73	76	77	67	77	71
Destination websites (e.g. visitgreenland.com, visiticeland.com)	50	45	60	56	54	49	51
Personal relations (friend, family, co-worker)	55	40	48	36	46	37	44
Holiday review websites (e.g. TripAdvisor)	31	26	35	30	25	27	22
Guide book	35	39	36	33	29	21	23
Travel magazine	30	34	32	27	27	31	28
Travel agent	15	31	28	34	21	34	19
Books/literature	20	25	26	27	20	17	24
Newspaper	22	15	23	21	15	18	32
Social media (e.g. Facebook, Instagram, Twitter)	25	19	23	13	14	15	22
Online booking agent (e.g. Expedia, booking.com)	18	21	19	17	11	15	11
Previous personal knowledge	15	14	16	9	12	6	20

Q7: When thinking about travelling to this destination, how would you like to look for inspiration/information for this trip?

Basis: All respondents in Sweden interested to travel to any of the 10 remote destinations (n=1,724) by most important segments; definitions: see page 88

Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat



Visit Greenland segmentation: Sweden *(interested in any of the remote destinations)*

Preferred online content when looking for information about remote travel destinations



	Culture		Culture&Nature		Nature		Special Interest
	<i>Culture Lover</i>	<i>Culture Appreciator</i>	<i>Globetrotter</i>	<i>Sightseer</i>	<i>Nature Lover</i>	<i>Nature Appreciator</i>	
Pictures of the destination, its natural/cultural attractions	73	70	79	81	77	78	74
Texts on how to get there/get around, where to stay, to eat & go shopping	62	70	69	66	75	69	56
Pictures of accommodations/activities/tours	50	62	56	57	52	56	53
Texts from other travellers with recommendations what do there	53	47	60	55	47	51	50
Videos of nature/landscapes incl. natural phenomena	23	31	43	38	37	40	44
Contact options, where to find specific information/ travel offers	32	25	37	34	31	34	31
Texts with stories by locals about their daily life/culture	26	23	31	23	25	14	20
Videos about local cultural traditions/lifestyle/art	21	20	31	22	20	11	20
Destination companies' newsletters	13	17	18	21	13	15	20
Social media posts/stories	18	11	15	11	7	9	20

Q8: Which kind of content do you like to find when looking for online information about this destination?

Basis: All respondents in Sweden interested to travel to any of the 10 remote destinations (n=1,724) by most important segments; definitions: see page 88

Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

ANNEX A3:
Detailed tabulations about the Visit Greenland segments
on the NORWEGIAN market



Visit Greenland segmentation: Norway (*interested in any of the remote destinations*)

		INTEREST FOCUS			
		Culture	Culture&Nature	Nature	Personal Challenge
ENGAGEMENT LEVEL	Immersion	4% n=68* Ethnophile		1% n=9* Wilderness Seeker	
	Interaction	8% n=137 Culture Lover	27% n=467 Globetrotter	5% n=91 Nature Lover	5% n=87 Special Interest
	Observation	8% n=132 Culture Appreciator	22% n=385 Sightseer	7% n=124 Nature Appreciator	14%** 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? (Interest focus)

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? (Engagement level)

Basis: All respondents in Norway interested to travel to any of the 10 remote destinations (n=1,746); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat



Visit Greenland segmentation: Norway *(interested in any of the remote destinations)*

Preferred experiences



	Culture		Culture&Nature		Nature		Special Interest
	<i>Culture Lover</i>	<i>Culture Appreciator</i>	<i>Globetrotter</i>	<i>Sightseer</i>	<i>Nature Lover</i>	<i>Nature Appreciator</i>	
Stunning scenery <small>(e.g. mountains, fjords, cliffs)</small>	70	55	75	71	74	67	70
Volcanoes/hot springs/geysers	66	67	66	70	54	60	63
Natural phenomena <small>(e.g. northern lights, midnight sun)</small>	41	44	51	44	45	48	47
Capitals/cities	56	55	46	49	31	31	29
Historic sights/events	48	39	49	49	34	33	24
New and unexpected experiences	38	38	49	44	38	31	29
Traditional villages	44	29	41	40	38	33	38
Wildlife <small>(e.g. Whales, birds)</small>	32	33	44	38	43	36	44
Glaciers/icebergs	34	31	38	34	38	39	40
Contemporary culture/lifestyle	44	39	41	26	23	12	14

Q4: When thinking about travelling to this destination, what would you like to see/experience?

Basis: All respondents in Norway interested to travel to any of the 10 remote destinations (n=1,746) by most important segments; definitions: see page 95

Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat



Visit Greenland segmentation: Norway *(interested in any of the remote destinations)*

Preferred activities



	Culture		Culture&Nature		Nature		Special Interest
	Culture Lover	Culture Appreciator	Globetrotter	Sightseer	Nature Lover	Nature Appreciator	
Guided nature excursions	50	54	66	62	60	61	59
Eating/drinking local specialities	65	61	61	56	50	42	51
Swimming/wellness (e.g. in thermal baths)	57	50	55	56	49	52	48
Hiking	46	30	58	49	61	45	44
Wildlife watching (e.g. whales, birds, musk ox, reindeer)	34	34	44	38	35	39	50
Photography	41	26	43	35	41	33	41
Experience quietness	36	26	32	32	40	37	27
Guided cultural tours	39	40	39	35	22	11	14
Meeting/mingling with the locals	33	21	37	24	27	19	17
Learning about local handicraft	25	18	26	20	24	17	13
Horseback riding	18	15	27	20	21	25	16
Dog-sledding	17	15	23	18	23	22	25
Glacier hiking	19	12	24	15	29	21	29
Shopping for souvenirs	15	31	20	22	10	24	13
Fishing	11	9	16	16	22	25	42
Cycling	16	11	20	14	21	19	24
Kayaking	7	9	24	14	22	15	23
Skiing	8	5	11	5	18	11	25
Hunting	3	3	4	6	7	8	19

Q5: Which of the following activities would you like to do when travelling to this destination?

Basis: All respondents in Norway interested to travel to any of the 10 remote destinations (n=1,746) by most important segments; definitions: see page 95

Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat



Visit Greenland segmentation: Norway (*interested in any of the remote destinations*)

Preferred ways to travel to remote destinations



To get there and back:	Culture		Culture&Nature		Nature		Special Interest
	<i>Culture Lover</i>	<i>Culture Appreciator</i>	<i>Globetrotter</i>	<i>Sightseer</i>	<i>Nature Lover</i>	<i>Nature Appreciator</i>	
Plane: Direct flight to the destination	93	93	88	90	84	88	86
Plane: Round trip combining multiple countries	20	9	20	12	21	11	12
Cruise: Start/End in Scandinavia/Continental Europe	15	9	12	9	15	10	7
Cruise: Start/End in Greenland/Iceland	8	6	8	9	9	8	6
Cruise: Transatlantic	4	7	5	5	4	3	1
At the destination:							
Stay at one location	41	49	34	38	33	43	25
Stay at multiple locations	60	43	68	57	60	46	69
Excursions to one of the other countries (e.g. from Iceland to Greenland)	12	16	16	16	23	13	13
Organisation:							
Package/tour operator	34	46	42	45	41	47	34
Self	69	60	68	60	66	54	70

Q6: How would you like to travel to this destination?

Basis: All respondents in Norway interested to travel to any of the 10 remote destinations (n=1,746) by most important segments; definitions: see page 95

Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat



Visit Greenland segmentation: Norway *(interested in any of the remote destinations)*

Preferred sources of inspiration and information when travelling to remote destinations



	Culture		Culture&Nature		Nature		Special Interest
	<i>Culture Lover</i>	<i>Culture Appreciator</i>	<i>Globetrotter</i>	<i>Sightseer</i>	<i>Nature Lover</i>	<i>Nature Appreciator</i>	
Internet search engine	86	82	85	84	77	77	89
Destination websites <small>(e.g. visitgreenland.com, visiticeland.com)</small>	57	45	56	47	41	45	40
Holiday review websites (e.g. TripAdvisor)	44	38	47	38	32	33	35
Personal relations (friend, family, co-worker)	41	38	43	37	31	36	35
Guide book	39	25	43	35	27	23	39
Online booking agent (e.g. Expedia, booking.com)	25	27	31	23	20	20	19
Books/literature	25	17	31	24	24	14	22
Travel agent	24	23	22	27	20	25	21
Social media (e.g. Facebook, Instagram, Twitter)	20	19	26	21	24	21	25
Travel magazine	16	18	24	21	20	18	21
Previous personal knowledge	13	10	14	12	21	11	15
Newspaper	5	3	6	6	4	3	2

Q7: When thinking about travelling to this destination, how would you like to look for inspiration/information for this trip?

Basis: All respondents in Norway interested to travel to any of the 10 remote destinations (n=1,746) by most important segments; definitions: see page 95

Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat



Visit Greenland segmentation: Norway *(interested in any of the remote destinations)*

Preferred online content when looking for information about remote travel destinations



	Culture		Culture&Nature		Nature		Special Interest
	<i>Culture Lover</i>	<i>Culture Appreciator</i>	<i>Globetrotter</i>	<i>Sightseer</i>	<i>Nature Lover</i>	<i>Nature Appreciator</i>	
Pictures of the destination, its natural/cultural attractions	81	80	77	82	78	78	74
Pictures of accommodations/activities/tours	71	71	74	77	63	67	72
Texts on how to get there/get around, where to stay, to eat & go shopping	70	73	72	68	47	62	64
Texts from other travellers with recommendations what do there	56	52	61	52	43	39	42
Videos of nature/landscapes incl. natural phenomena	27	32	38	38	41	39	41
Texts with stories by locals about their daily life/culture	43	27	46	37	32	23	27
Contact options, where to find specific information/ travel offers	26	19	29	20	31	21	29
Destination companies' newsletters	19	19	29	23	26	23	24
Videos about local cultural traditions/lifestyle/art	31	15	28	22	22	13	18
Social media posts/stories	16	15	19	18	20	19	21

Q8: Which kind of content do you like to find when looking for online information about this destination?

Basis: All respondents in Norway interested to travel to any of the 10 remote destinations (n=1,746) by most important segments; definitions: see page 95







Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

ANNEX B:

Detailed tabulations about product expectations when travelling to Greenland/Iceland/Arctic Scandinavia in Denmark, Sweden and Norway

Product expectations of potential travellers to Greenland/Iceland/Arctic Scandinavia

- » This annex is benchmarking the product expectations of the potential travellers to Greenland, Iceland and Arctic Scandinavia in Denmark, Sweden and Norway.
- » Technically, it was necessary that each respondent answered the following questions regarding product expectations only concerning one destination.
- » This makes it necessary to filter these questions according to specific rules, if a respondent was interested to travel to more than one of the four destinations. This filtering was done according to the following rules ...

Potential travellers to ...	... Greenland	... Iceland	... Arctic Scandinavia
		 	  
Definition	All persons interested in travelling to Greenland	All persons interested in travelling to the Faroe Islands but not interested to travel to Greenland	All persons interested in travelling to Lapland/Northern Scandinavia but not interested to travel to Iceland or to Greenland
Interviews	DK: n=576 SWE: n=282 NOR: n=352	DK: n=418 SWE: n=907 NOR: n=935	DK: n=119 SWE: n=122 NOR: n=107

Source: Visit Greenland/Air Greenland online survey 2018 on the Scandinavian market by NIT/Norstat




Potential travellers to Greenland/Iceland/Arctic Scandinavia: Preferred holiday experiences in the destinations

	DK: Greenland	DK: Iceland	DK: Arctic Scand.	SWE: Greenland	SWE: Iceland	SWE: Arctic Scand.	NOR: Greenland	NOR: Iceland	NOR: Arctic Scand.
stunning scenery (e.g. mountains, fjords, cliffs)	83	88	85	76	81	87	73	71	77
glaciers/icebergs	80	68	60	68	54	50	56	42	42
wildlife (e.g. whales, birds, musk ox, reindeer)	75	61	65	65	55	63	55	36	47
natural phenomena (e.g. northern lights, midnight sun)	77	76	80	62	57	66	46	46	57
new and unexpected experiences	51	44	44	50	40	42	55	41	44
traditional villages	43	37	37	49	32	35	52	35	40
historic sights/events	28	32	28	26	32	33	40	43	46
volcanoes/hot springs/geysers	21	59	35	40	80	57	27	78	52
contemporary culture/lifestyle	31	31	29	19	16	16	41	31	35
capitals/cities	22	35	28	20	35	25	29	44	40

Q4: When thinking about travelling to Greenland/Iceland/Arctic Scandinavia what would you like to see/experience?

Basis: Potential travellers to Greenland/Iceland/Arctic Scandinavia from Denmark, Sweden and Norway (see page 102 for definition and size of segments); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat




Potential travellers to Greenland/Iceland/Arctic Scandinavia: Preferred holiday activities in the destinations I

	DK: Greenland	DK: Iceland	DK: Arctic Scand.	SWE: Greenland	SWE: Iceland	SWE: Arctic Scand.	NOR: Greenland	NOR: Iceland	NOR: Arctic Scand.
guided nature excursions	78 	75	70	71 	67	65	72 	65	60
wildlife watching (e.g. whales, birds, musk ox, reindeer)	77	64	70	69	58	68	55	37	46
hiking	66	69	71	54	51	61	58	49	60
dog-sledding	72	44	46	37	23	28	33	20	25
eating/drinking local specialities	38	41	40	56	51	53	55	56	54
experience quietness	52	50	60	45	42	56	39	32	42
glacier hiking	46	46	43	46	35	35	34	22	24
photography	43	40	43	42	36	43	42	39	42
meeting and mingling with the locals	33	29	32	38	28	31	40	29	35
guided cultural tours	29	30	26	35	29	28	40	32	34

Q5: Which of the following activities would you like to do when travelling to Greenland/Iceland/Arctic Scandinavia?

Basis: Potential travellers to Greenland/Iceland/Arctic Scandinavia from Denmark, Sweden and Norway (see page 102 for definition and size of segments); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat




Potential travellers to Greenland/Iceland/Arctic Scandinavia: Preferred holiday activities in the destinations II

	DK: Greenland	DK: Iceland	DK: Arctic Scand.	SWE: Greenland	SWE: Iceland	SWE: Arctic Scand.	NOR: Greenland	NOR: Iceland	NOR: Arctic Scand.
kayaking	23 	21	20	32 	19	27	28 	17	20
learning about local handicraft	26	21	24	26	18	20	32	21	25
swimming/wellness (e.g. in thermal baths)	16	45	26	36	64	53	28	62	46
fishing	20	16	19	20	15	21	29	16	21
shopping for souvenirs	19	18	15	20	15	17	15	20	19
skiing	13	10	15	17	8	15	18	8	15
horseback riding	7	16	13	19	33	28	18	25	22
cycling	8	14	12	14	13	19	14	16	21
hunting	9	5	6	4	2	4	7	4	5
other	4	5	5	4	4	3	5	6	6

Q5: Which of the following activities would you like to do when travelling to Greenland/Iceland/Arctic Scandinavia?

Basis: Potential travellers to Greenland/Iceland/Arctic Scandinavia from Denmark, Sweden and Norway (see page 102 for definition and size of segments); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat




Potential travellers to Greenland/Iceland/Arctic Scandinavia: Preferences about getting to Greenland getting around in Greenland and travel organisation

	DK: Greenland	DK: Iceland	DK: Arctic Scand.	SWE: Greenland	SWE: Iceland	SWE: Arctic Scand.	NOR: Greenland	NOR: Iceland	NOR: Arctic Scand.
<u>Plane</u> : direct flight	93 	93	81	77 	90	77	88 	93	84
<u>Plane</u> : round trip, multiple countries	18	17	20	22	8	12	22	11	16
<u>Cruise</u> : start/end in Scandinavia/continental Europe	10	11	17	20	11	18	18	9	14
<u>Cruise</u> : start/end in Greenland/Iceland	21	14	16	15	7	9	20	8	12
<u>Cruise</u> : transatlantic	9	7	9	11	5	7	7	4	6
<u>At the destination</u> : Stay at one location	24	32	30	19	21	20	29	40	36
<u>At the destination</u> : Stay at multiple locations	73	71	72	75	71	77	67	56	68
<u>At the destination</u> : Excursions to one of the other countries	17	14	16	27	17	20	29	15	19
<u>Preferred organisation</u> : Package/tour operator	53	52	52	58	55	51	53	41	43
<u>Preferred organisation</u> : self	52	59	58	49	53	61	62	63	70

Q6: How would you like to travel to Greenland/Iceland/Arctic Scandinavia?

Basis: Potential travellers to Greenland/Iceland/Arctic Scandinavia from Denmark, Sweden and Norway (see page 102 for definition and size of segments); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

Potential travellers to Greenland/Iceland/Arctic Scandinavia: Preferred sources for inspiration & information

	DK: Greenland	DK: Iceland	DK: Arctic Scand.	SWE: Greenland	SWE: Iceland	SWE: Arctic Scand.	NOR: Greenland	NOR: Iceland	NOR: Arctic Scand.
Internet search engine	79	83	84	76	76	76	86	84	82
Destination websites (e.g. visitgreenland.com)	55 	56	58	62 	57	61	56 	52	56
Personal relations (friend, family, co-worker)	53	55	53	35	42	45	32	39	41
Guide book	44	48	46	37	31	37	37	35	38
Travel agent	43	40	39	35	28	29	27	25	21
Holiday review sites (e.g. TripAdvisor)	30	36	34	27	31	33	41	43	44
Books/literature	32	32	33	26	22	24	34	23	28
Travel magazine	20	20	19	35	29	29	20	19	25
Online booking agent (e.g. Expedia, booking.com)	14	17	16	21	17	18	31	27	28
Social media (e.g. Facebook, Instagram, Twitter)	16	18	18	18	19	20	24	24	27
Newspaper	7	7	8	26	18	22	5	4	7
Previous experience	15	15	17	8	9	16	9	11	17

Q7: When thinking about travelling to Greenland/Iceland/Arctic Scandinavia how would you like to look for inspiration/information for this trip?

Basis: Potential travellers to Greenland/Iceland/Arctic Scandinavia from Denmark, Sweden and Norway (see page 102 for definition and size of segments); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat

Potential travellers to Greenland/Iceland/Arctic Scandinavia: Preferred kind of online content

	DK: Greenland	DK: Iceland	DK: Arctic Scand.	SWE: Greenland	SWE: Iceland	SWE: Arctic Scand.	NOR: Greenland	NOR: Iceland	NOR: Arctic Scand.
Pictures of the destination, its natural/cultural attractions	70	73	75	77	75	75	80	77	77
Pictures of accommodations/activities/tours	67	71	69	58	55	60	80	76	76
Texts on how to get there/get around, where to stay, to eat & go shopping	62	70	72	66	68	72	69	69	71
Texts from other travellers with recommendations what to do there	53	56	56	58	56	56	57	54	56
Videos of nature/landscapes incl. natural phenomena	41	38	40	48	39	43	49	36	42
Contact options, where to find specific information/travel offers	45	47	50	39	33	35	37	26	33
Texts with stories by locals about their daily life/culture	35	33	35	36	24	29	47	37	40
Videos about local cultural traditions/lifestyle/art	24	21	23	31	22	26	31	23	28
Destination companies' newsletters	14	14	16	22	17	19	28	23	27
Social media posts/stories	14	14	13	16	13	14	20	19	22

Q8: Which kind of content do you like to find when looking for online information about Greenland/Iceland/Arctic Scandinavia ?

Basis: Potential travellers to Greenland/Iceland/Arctic Scandinavia from Denmark, Sweden and Norway (see page 102 for definition and size of segments); Source: Visit Greenland/Air Greenland online survey 2018 by NIT/Norstat