NEW INSIGHTS FOR TOURISM

Positioning and potentials of Greenland on the FRENCH market

Full report

April 2017

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Introduction and background of this study

- Visit Greenland (VG) with the support of Air Greenland has commissioned the Institute for Tourism Research in Northern Europe (NIT) to conduct a market research study on the “Positioning and potential of Greenland on the FRENCH 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 France, in order to provide a sound basis for the future strategic planning of Greenland concerning its marketing efforts, product development and communication on this market.
- The study in France followed the same methodological approach as in the 2016 studies in Germany, Great Britain and USA (4,000 online interviews per market) using the same questionnaire (plus selected additional questions), in order to be able to compare the results of the four markets.
- In France, the results are representative for the French population aged 16-75 years
- All interviews were conducted by our partner IPSOS in January 2017, based on their online access panels in France.
- The report focusses on the results in France, but also shows comparisons with Germany, Great Britain and USA in order do give the reader the full picture regarding all four markets at one glance in one report.

Previous studies following the same methodology

- The results of the previous studies conducted during the year 2016 in the markets Germany, UK and USA have been covered in two reports.
- The first report, taking the perspective of Visit Greenland and Air Greenland is dealing with the potentials of Greenland in all three markets. It has not been published but is in the exclusive possession of Visit Greenland and Air Greenland.
- The second 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


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

Full report

greenland
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air greenland

June 2016
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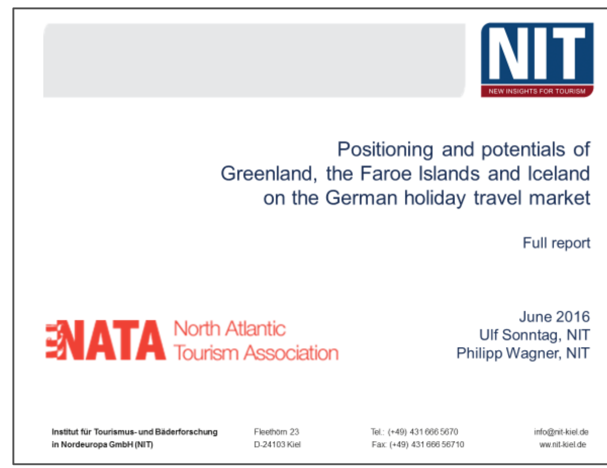
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Positioning and potentials of
Greenland, the Faroe Islands and Iceland
on the German holiday travel market

Full report

NATA North Atlantic Tourism Association

June 2016
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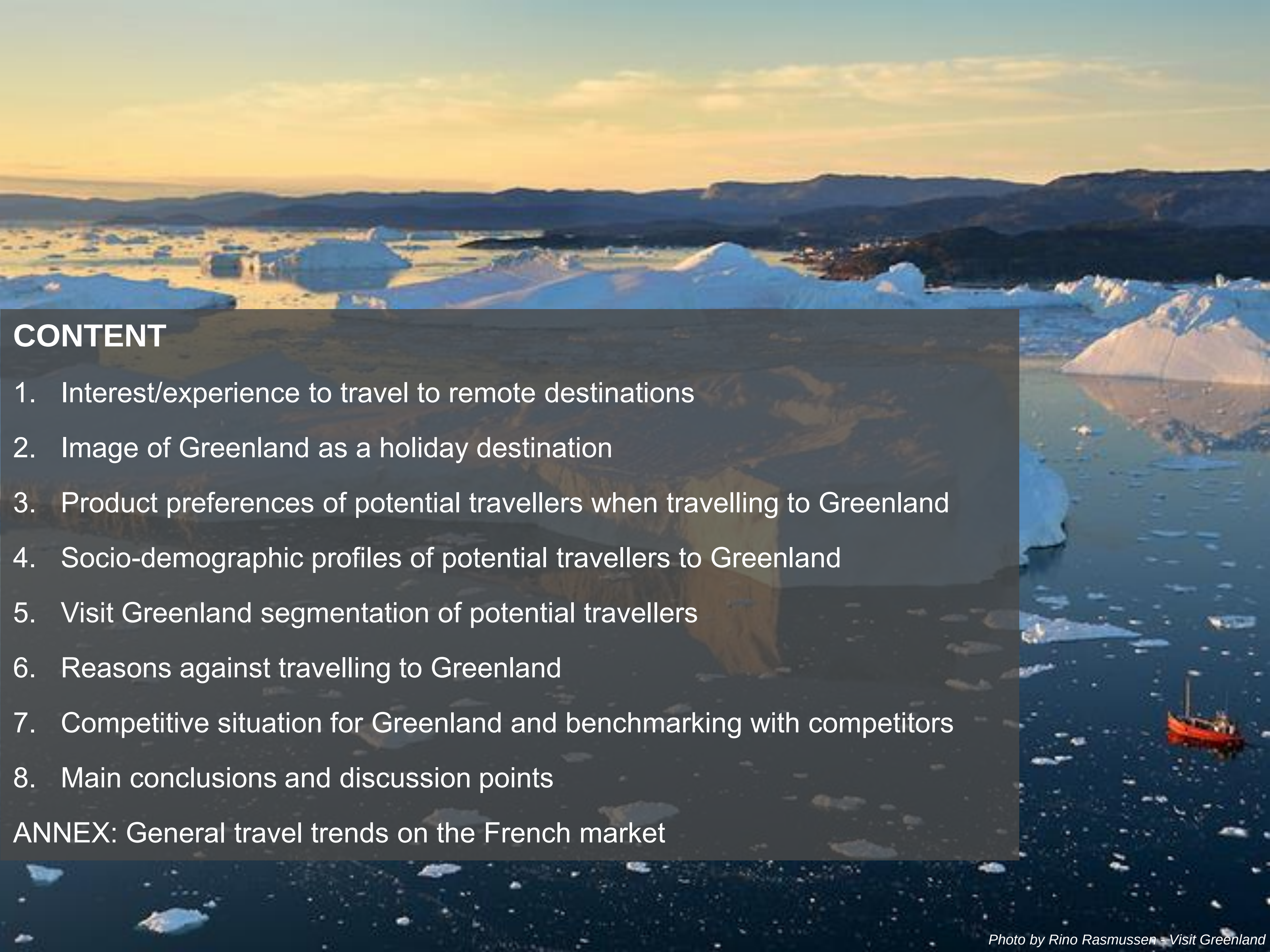


CONTENT

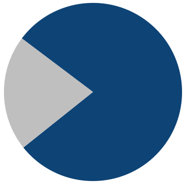
1. Interest/experience to travel to remote destinations
2. Image of Greenland as a holiday destination
3. Product preferences of potential travellers when travelling to Greenland
4. Socio-demographic profiles of potential travellers to Greenland
5. Visit Greenland segmentation of potential travellers
6. Reasons against travelling to Greenland
7. Competitive situation for Greenland and benchmarking with competitors
8. Main conclusions and discussion points

ANNEX: General travel trends on the French market

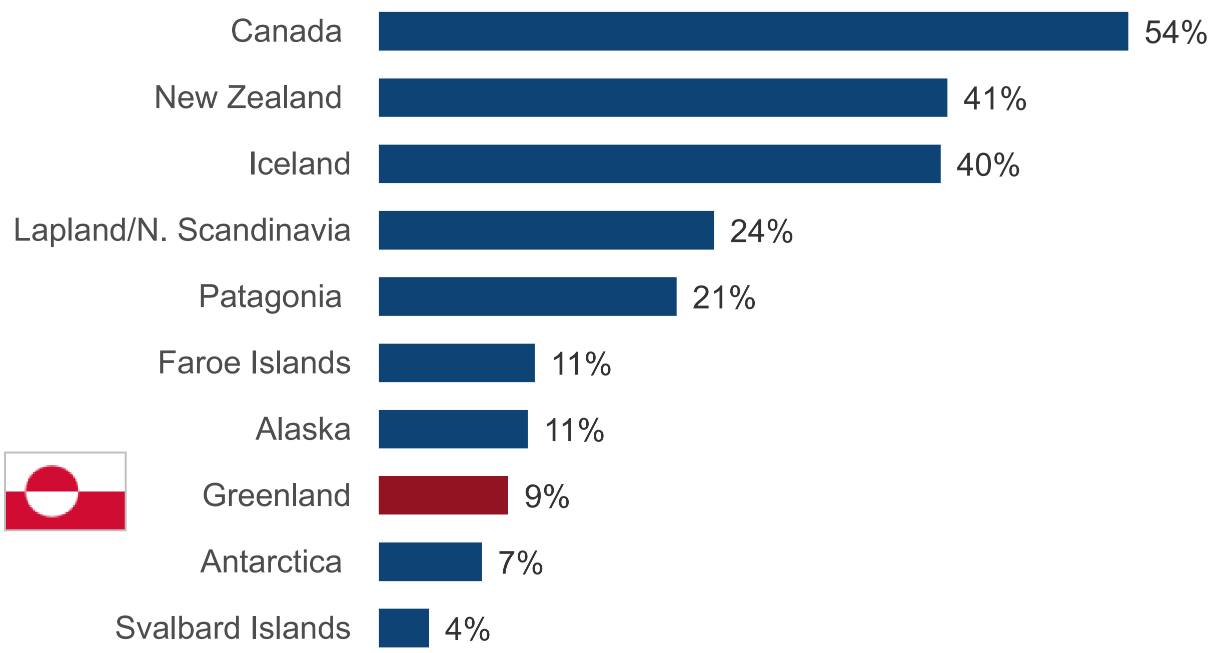
Photo by Rino Rasmussen - Visit Greenland


1. Interest/experience
to travel to remote destinations
Photo by Mads Pihl - Visit Greenland

General interest to travel to remote destinations in the French population



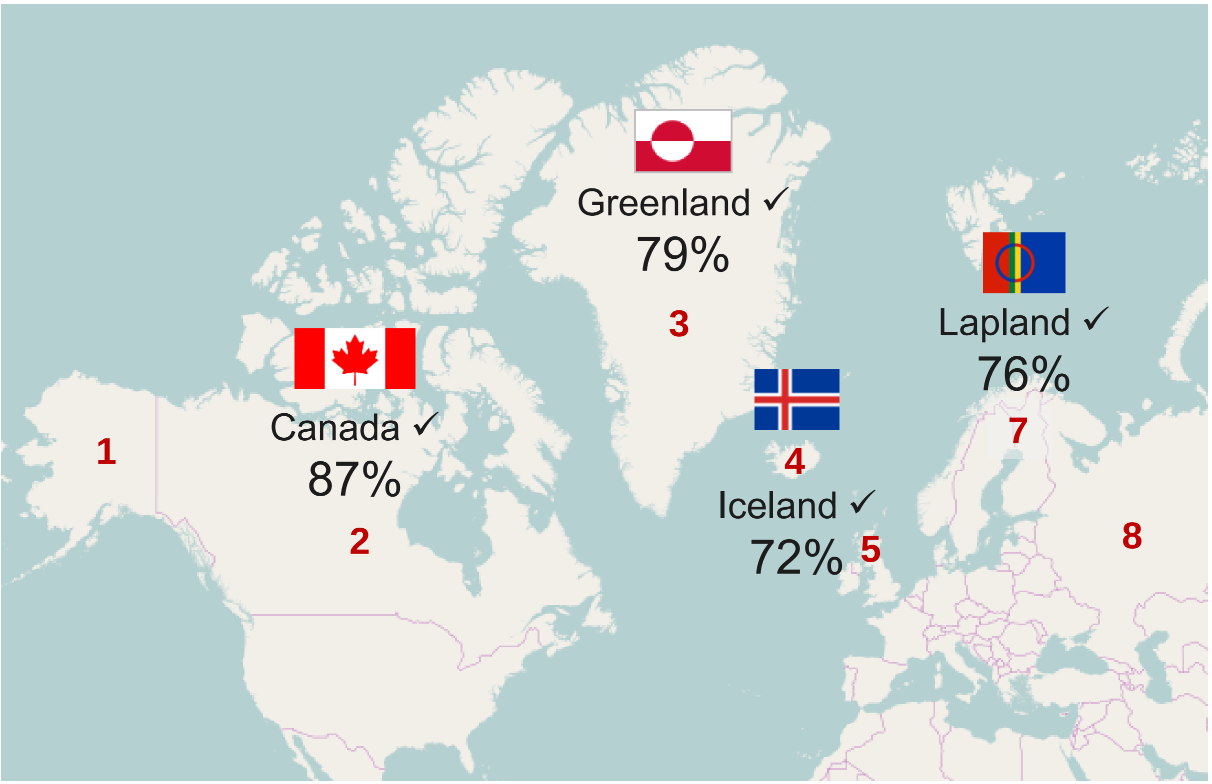
79% of the French population would like to go to at least one of these 10 remote destinations in the next 5 years



- 79% of the French population would like to go to at least one of these 10 remote destinations in the next 5 years.
- Canada is the most popular destination in terms of general interest, New Zealand, Iceland and Lapland/Northern Scandinavia follow.
- 9% would like to go 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?*
Basis: All respondents in France (n=4,000); Source: VG online survey 2017 by NIT/Ipsos

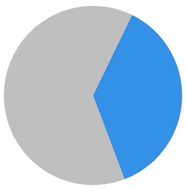
Geography check with potential travellers to Greenland, Iceland, Lapland and Canada



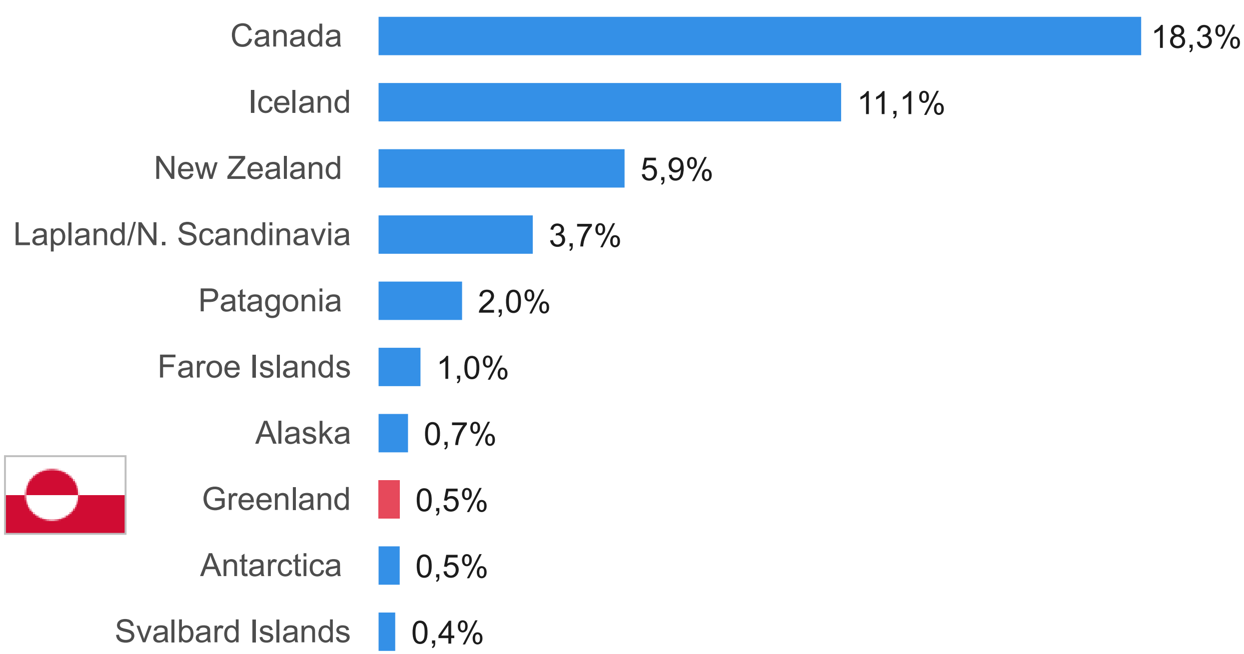
- In order to get a feeling if the potential travellers to Greenland know what they are talking about, we have quizzed them in an additional question if they can place Greenland on a map.
- We have used the same map as on this slide, just with the country outlines and the numbers 1 to 8.
- 79% of potential guests to Greenland have placed it correctly.
- This is a good result compared with Greenland's main competitors. Only Canada receives a higher score.
- This shows that almost all potential travellers to Greenland seem to have at least some factual knowledge about the destination.

Q10: *Now we have a little geography quiz for you. Please look at this map and tell me which is the right number on the map for each of these travel destinations: Greenland; Iceland; Lapland/Northern Scandinavia; Canada*
Basis: Potential travelllers ("would like to visit in the next 5 years) from France to Greenland (n=370), … to Iceland (n=1,616), … to Lapland/Northern Scandinavia (n=966), … to Canada (n=2,154)
Source: VG online survey 2017 by NIT/Ipsos

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



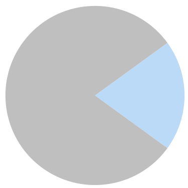
37% of the French population are almost definitely planning to go to one of these destinations in the next 2 years



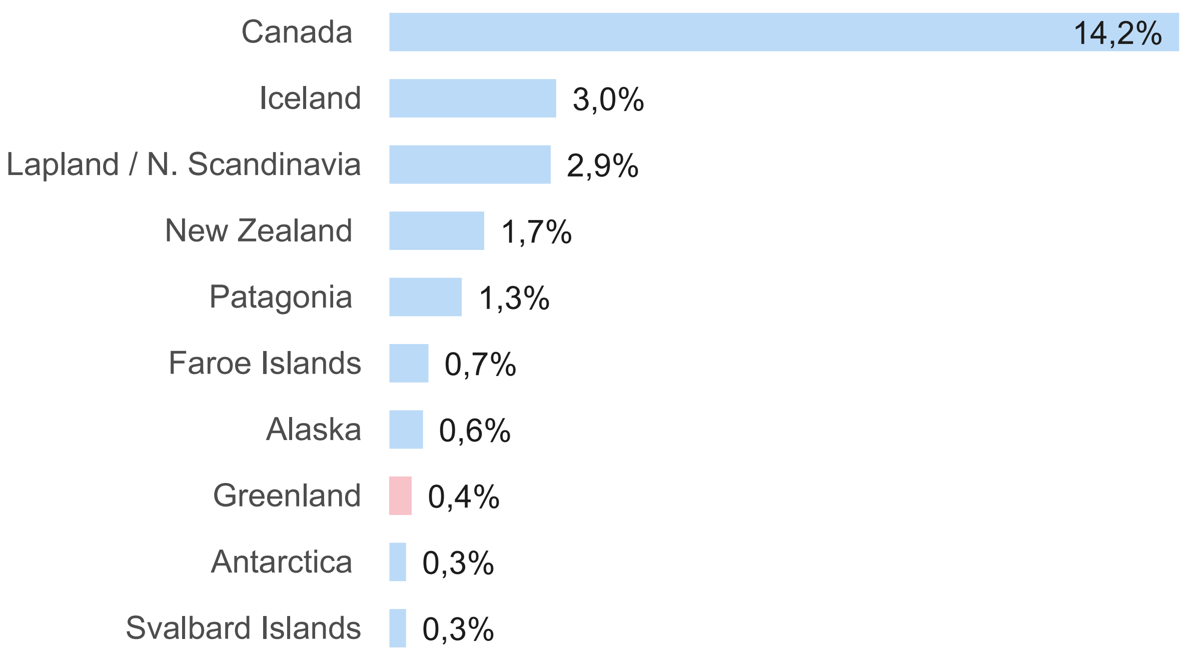
- 37% of the French population are almost definitely planning to go to one of these 10 remote destinations in the next 2 years.
- As with the general interest, Canada remains the most popular destination also in terms of this “hard potential”
- On the next ranks, Iceland and New Zealand follow, switching positions compared to the general interest to travel there.
- 0.5% of the French population are almost definitely planning to go to Greenland in the next 2 years.

Q2: *Now we are talking about remote travel destinations. And which of these travel destinations are you almost definitely planning to visit within the next 2 years?*
Basis: All respondents in France (n=4,000); Source: VG online survey 2017 by NIT/Ipsos

Actual holiday experience with remote destinations in the French population



20% of the French population have been to at least one of these destinations at least once in their life



- 20% of the French population have been to at least one of these 10 remote destinations at least once in their life.
- Canada is by far the most popular destination in terms of actual experience: More than 14% of the French have been there. All other destinations are much more exotic.
- Iceland and Lapland follow with around 3% of the French with all time experiences.
- Faroe Island, Alaska, Greenland, Antarctica and Svalbard Islands show figures below 1% - this means you cannot really use this figure to calculate an accurate volume.

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: All respondents in France (n=4,000); Source: VG online survey 2017 by NIT/Ipsos

Overview: General interest and “hard potential” of remote destinations and actual holiday experience

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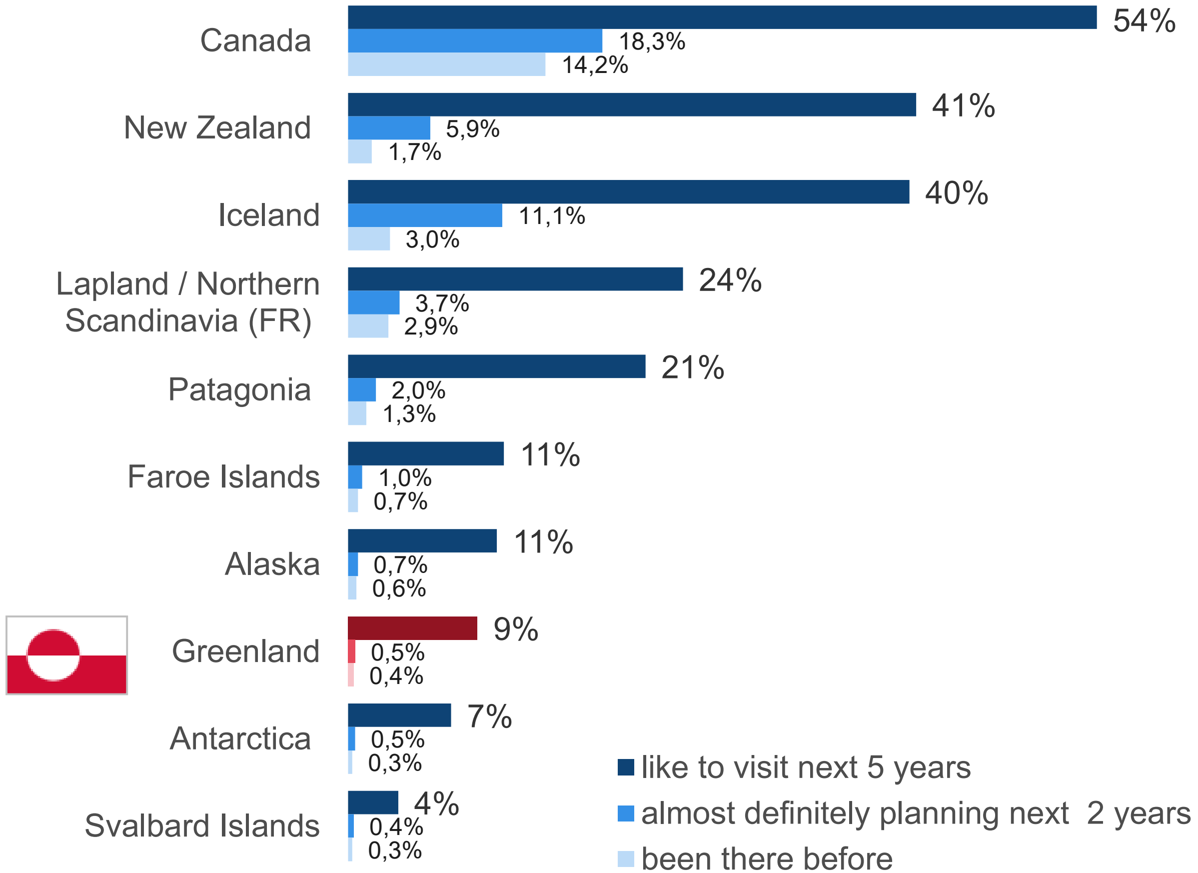


- This overview shows once more the figures of the previous slides.
- This summary of the general interest, the “hard potential” and the actual experience shows interesting characteristics of the destinations.
- Canada is the most established destination, with high values for hard potential and experience.
- Iceland is on the way to an established destination, with high values for hard potential but still quite low figures in experience.
- Greenland together with Faroe Islands, Alaska, Antarctica and Svalbard Islands are all very exotic destinations on the French market.

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: All respondents in France (n=4,000); Source: VG online survey 2017 by NIT/Ipsos

Volume extrapolations of actual and potential travellers to Greenland in the four markets

FUNNEL	Definition				
total potential	"like to travel to Greenland within the next 5 years"	4.4 million	5.1 million	5.3 million	16.3 million
'harder' potential	total potential, without reasons against travelling to Greenland	1.0 million	1.4 million	1.7 million	3.8 million
'hard' potential/planners	"almost definitely planning to visit Greenland within the next 2 years"	0.3 million	*0.3 million**	*0.3 million**	*0.8 million**
visitors	Plane and cruise passengers to Greenland in the years 2015/2016	5,800 plane**: 4,300 cruise***: 1,500	26,000 plane**: 9,000 cruise***: 17,000	6,500 plane**: 3,000 cruise***: 3,500	11,000 plane**: 7,000 cruise***: 4,000

Source: NATA/VG online surveys 2016/2017 by NIT/Ipsos; * Estimates, based on the results in France; ** stat.gl; *** estimate by VG based on stat.gl

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

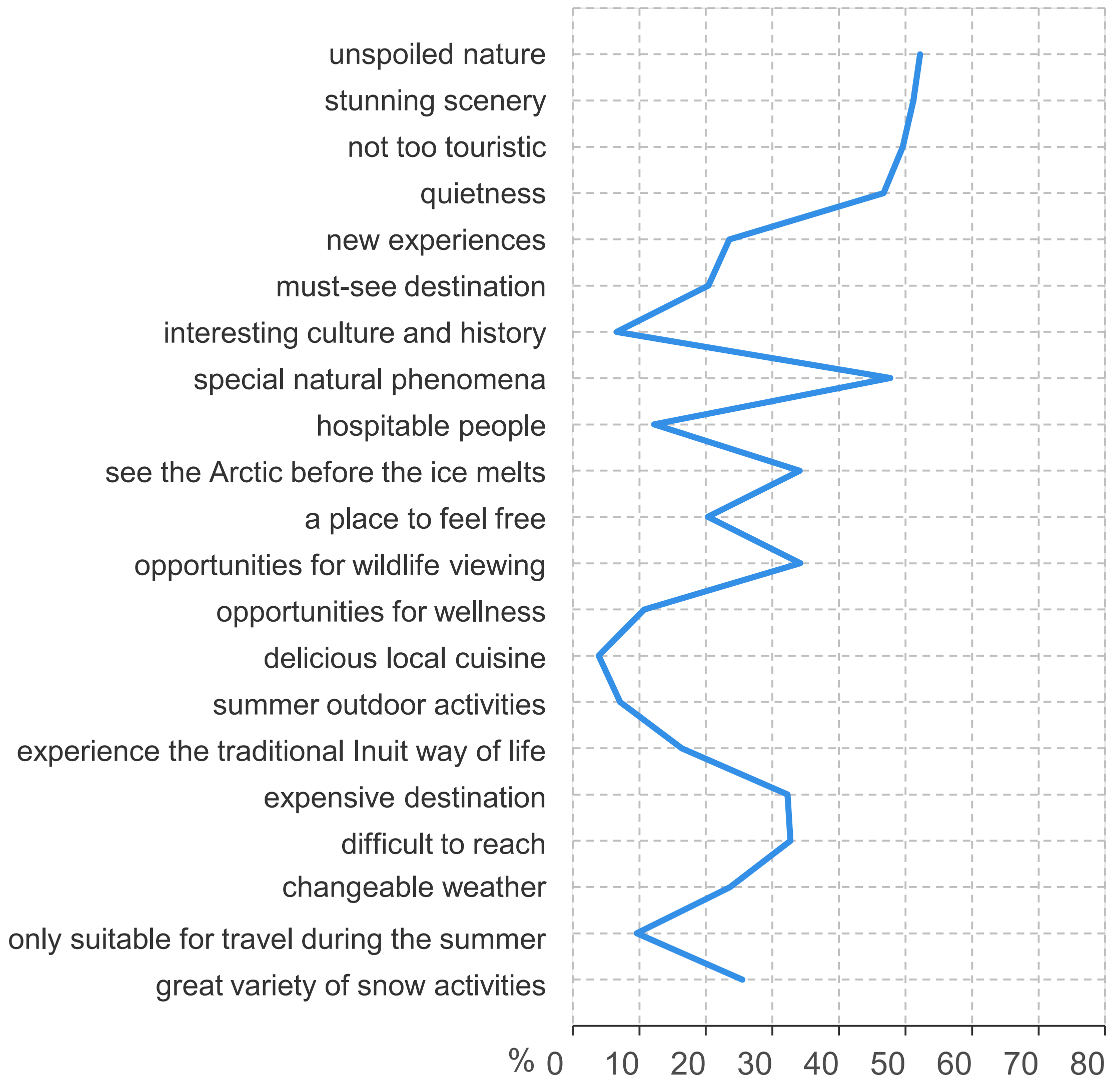
- 79% of the French population would like to go to at least one of these 10 remote destinations in the next 5 years. 37% are almost definitely planning to go to one of these destinations in the next 2 years. 20% have been to at least one of these destinations at least once in their life.
- 9% would like to go to Greenland, 0.5% are almost definitely planning to go there and 0.4% have been there in the past.
- When quizzed to locate Greenland on a map, the vast majority of potential travellers to Greenland (those who would like to visit in the next 5 years) do this correctly. This shows that they seem to have at least some factual knowledge about the destination.
- When looking at the different remote destinations, we see that Canada is the most established destination, with high values for hard potential and experience. Iceland is on the way to an established destination, with high values for hard potential but still quite low figures in experience.
- Greenland together with Faroe Islands, Alaska, Antarctica and Svalbard Islands are all very exotic destinations on the French market.
- The comparison with Germany, UK and USA regarding the volumes of potential and actual travellers to Greenland shows that France is currently the smallest of these four markets. Nevertheless, the potentials of France as a source market for Greenland are substantial.

- Compared with the actual demand, there is a huge interest to travel to Greenland in France. This is where destination marketing comes in. The following part of the report should help with strategic marketing decisions.
- The question regarding the geography show that you can rely on factual knowledge about Greenland when addressing the potential travellers. The question regarding the “hard potential” shows that Greenland is perceived as more exotic compared with its main competitors Iceland, Lapland and Canada.
- Chapter 7 of this report shows more detailed analyses about the competitive situation of Greenland in France.

2. Image of Greenland as a holiday destination

Photo by Mads Pihl - Visit Greenland

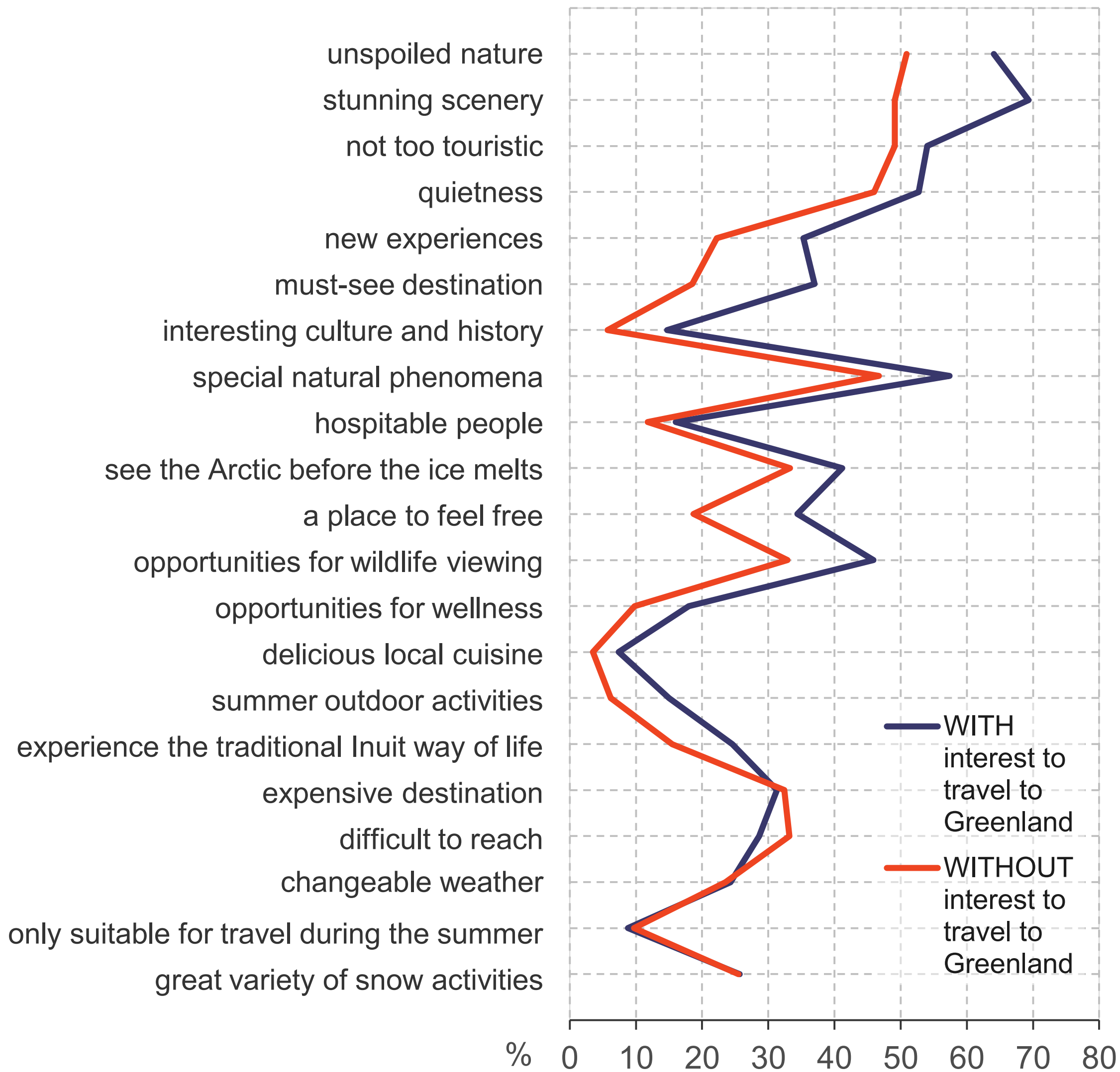
Image of Greenland in the French population



- The **key image factors** of Greenland are:
  - Unspoiled nature (52%)
  - Stunning scenery (51%)
  - Not too touristic (49%)
  - Natural phenomena (48%)
  - A place to find quietness (47%)
- Greenland is **not famous** for:
  - Delicious local cuisine (4%)
  - Interesting culture&history (7%)
  - Only suitable for travelling in the summer (10%)
- Persons in France who are aware of Greenland as a travel destination name on average 5.6 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 France, aware of Greenland as a travel destination (n=3,519)
Source: VG online survey 2017 by NIT/Ipsos

Image of Greenland with the potential travellers in France



- The **most striking differences** between persons WITH and WITHOUT interest to travel to Greenland can be found here:
  - Stunning scenery (+20%-pts.)
  - Must-see destination (+19%-pts.)
  - Place to feel free (+19%-pts.)
- Regarding three characteristics, the persons with NO interest in Greenland show higher figures:
  - Difficult to reach (+5%-pts.)
  - Expensive destination (+1%-pts.)
  - Summer-only destination (+1%-pts.)
- Persons with interest to travel to Greenland name on average 7.1 of the 21 characteristics in the question. Persons with NO interest name 5.4 characteristics.
- The image profiles in both groups run quite parallel, mostly with higher figures for the potential Greenland guests.

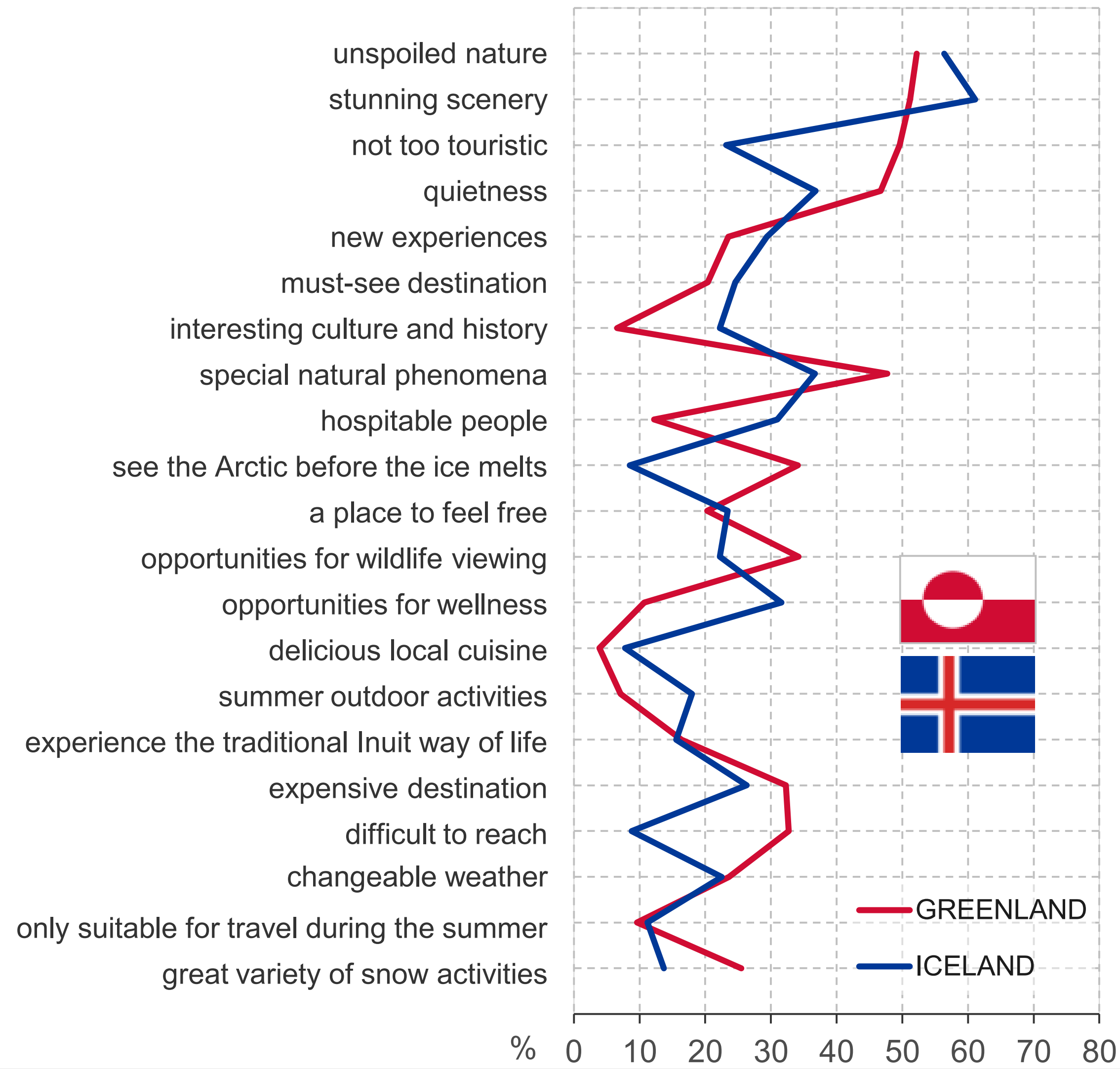
Q3: *Please tell me which of these characteristics do you think particularly apply to Greenland?*
Basis: All respondents in France, aware of Greenland as a travel destination WITH interest to travel there (n=357), WITHOUT (n=3,162)
Source: VG online survey 2017 by NIT/Ipsos

TOP10 image characteristics of Greenland with the population and potential travellers in France

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

Q3: *Please tell me which of these characteristics do you think particularly apply to Greenland?*
Basis: All respondents in France, aware of Greenland as a travel destination (n=3,519), potential travellers to Greenland (n=357); Source: VG online survey 2017 by NIT/Ipsos

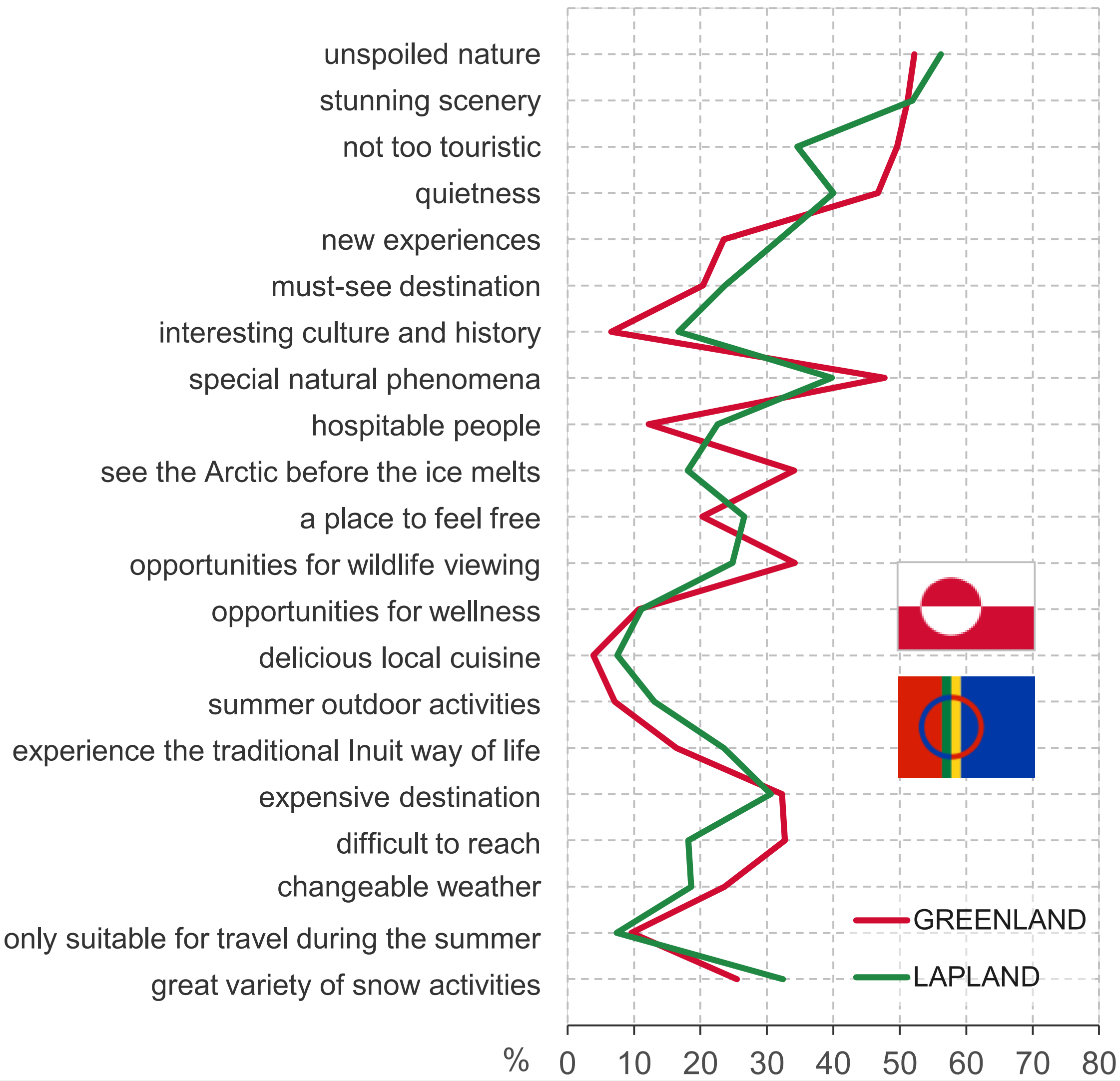
Image of Greenland and Iceland on the French market



- In the questionnaire in France, we not only asked for the image of Greenland, but also for the images of Iceland, Lapland and Canada.
- **More characteristic for Greenland** than for Iceland:
  - Not too touristic (+26%-pts.)
  - See the Arctic now (+26%-pts.)
  - Difficult to reach (+24%-pts.)
- **More characteristic for Iceland** than for Greenland:
  - Wellness (+21%-pts.)
  - Hospitable people (+19%-pts.)
  - Culture & history (+16%-pts.)
- Comparing the images of Greenland and Iceland, we can observe the top characteristics being the same: “Stunning scenery” and “Unspoiled nature”.

Q3: *Please tell me which of these characteristics do you think particularly apply to Greenland/ Iceland?*
Basis: All respondents in France, aware of Greenland (n=3,519) and Iceland (n=3,395) as a travel destination
Source: VG online survey 2017 by NIT/Ipsos

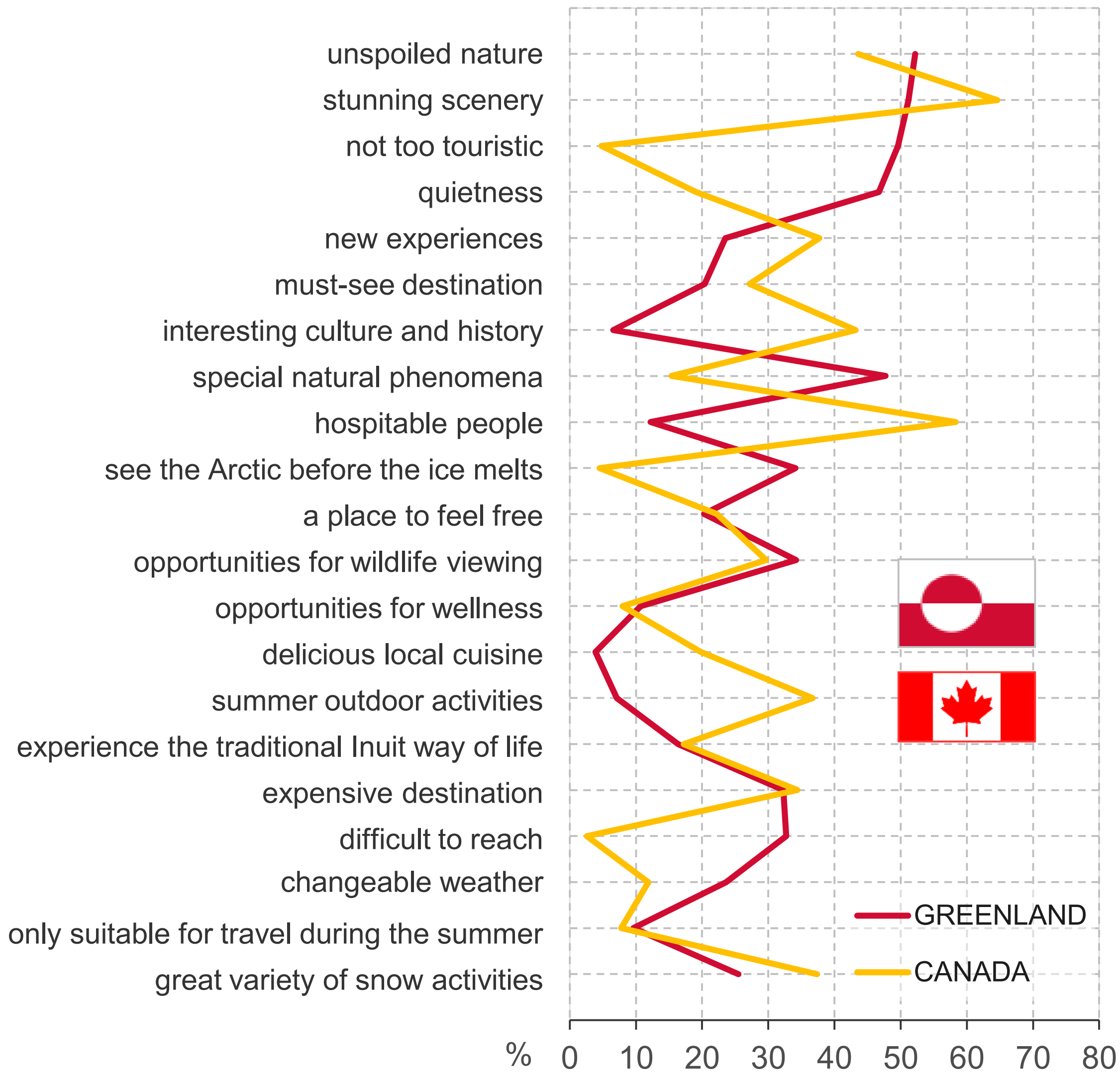
Image of Greenland and Lapland on the French market



- In the questionnaire in France, we not only asked for the image of Greenland, but also for the images of Iceland, Lapland and Canada.
- **More characteristic for Greenland** than for Lapland:
  - See the Arctic now (+16%-pts.)
  - Not too touristic (+15%-pts.)
  - Difficult to reach (+15%-pts.)
- **More characteristic for Lapland** than for Greenland:
  - Hospitable people (+10%-pts.)
  - Culture & history (+10%-pts.)
  - New experiences (+8%-pts.)
- Comparing the images of Greenland and Lapland, we can observe the top characteristics being the same: "Unspoiled nature" and "Stunning scenery".

Q3: *Please tell me which of these characteristics do you think particularly apply to Greenland/ Iceland?*
Basis: All respondents in France, aware of Greenland (n=3,519) and Lapland (n=1,612) as a travel destination
Source: VG online survey 2017 by NIT/Ipsos

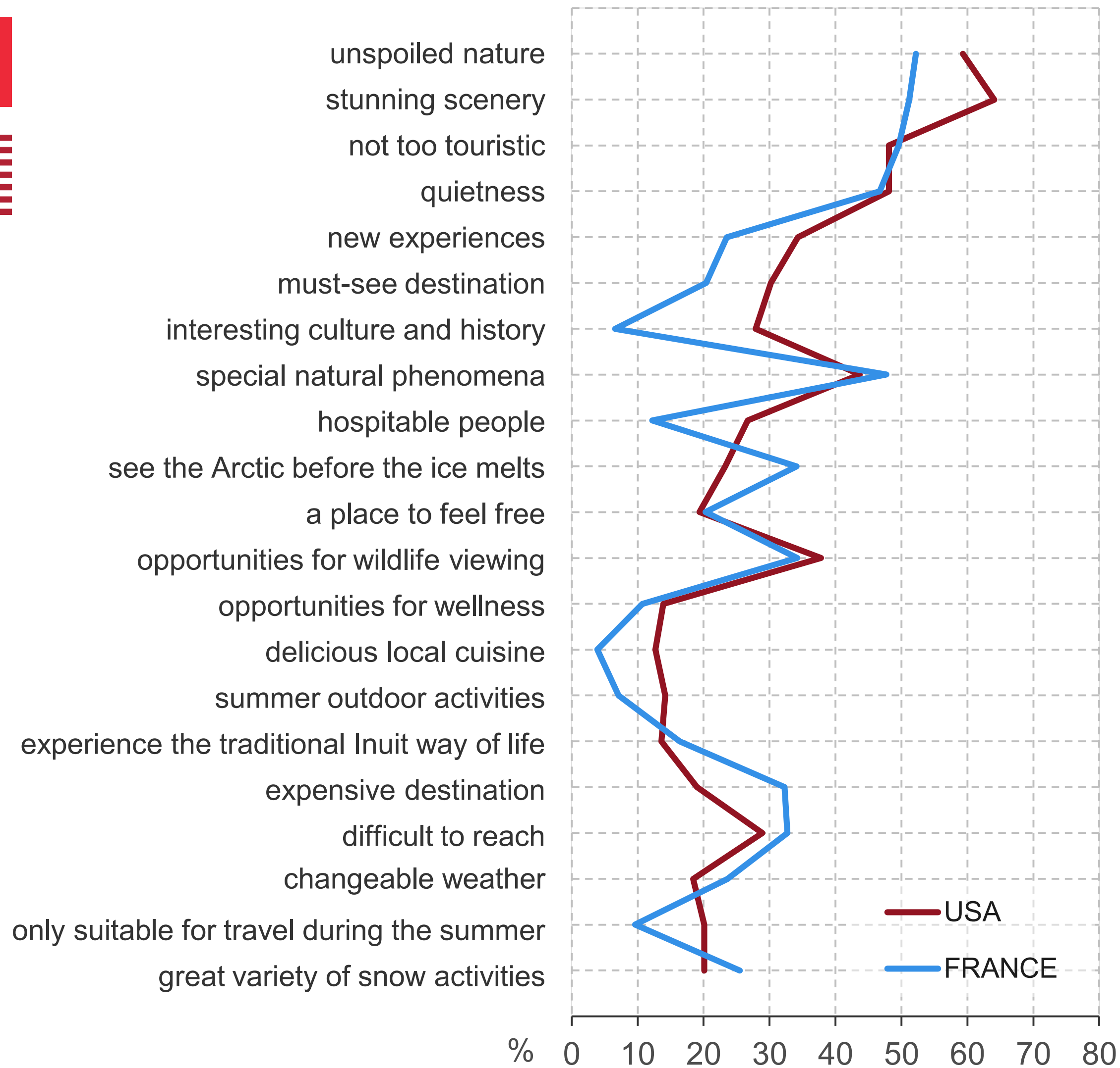
Image of Greenland and Canada on the French market



- In the questionnaire in France, we not only asked for the Image of Greenland, but also for the images of Iceland, Lapland and Canada.
- **More characteristic for Greenland** than for Canada:
  - Not too touristic (+45%-pts.)
  - See the Arctic now (+32%-pts.)
  - Difficult to reach (+30%-pts.)
- **More characteristic for Canada** than for Greenland:
  - Hospitable people (+46%-pts.)
  - Culture & history (+37%-pts.)
  - Summer activities (+30%-pts.)
- Comparing the images of Greenland and Iceland, we see that the image “lines” are very different, even though, the “Stunning Scenery” and “Unspoiled nature” are very important in both destinations.

Q3: *Please tell me which of these characteristics do you think particularly apply to Greenland/ Iceland?*
Basis: All respondents in France, aware of Greenland (n=3,519) and Iceland (n=1,822) as a travel destination
Source: VG online survey 2017 by NIT/Ipsos

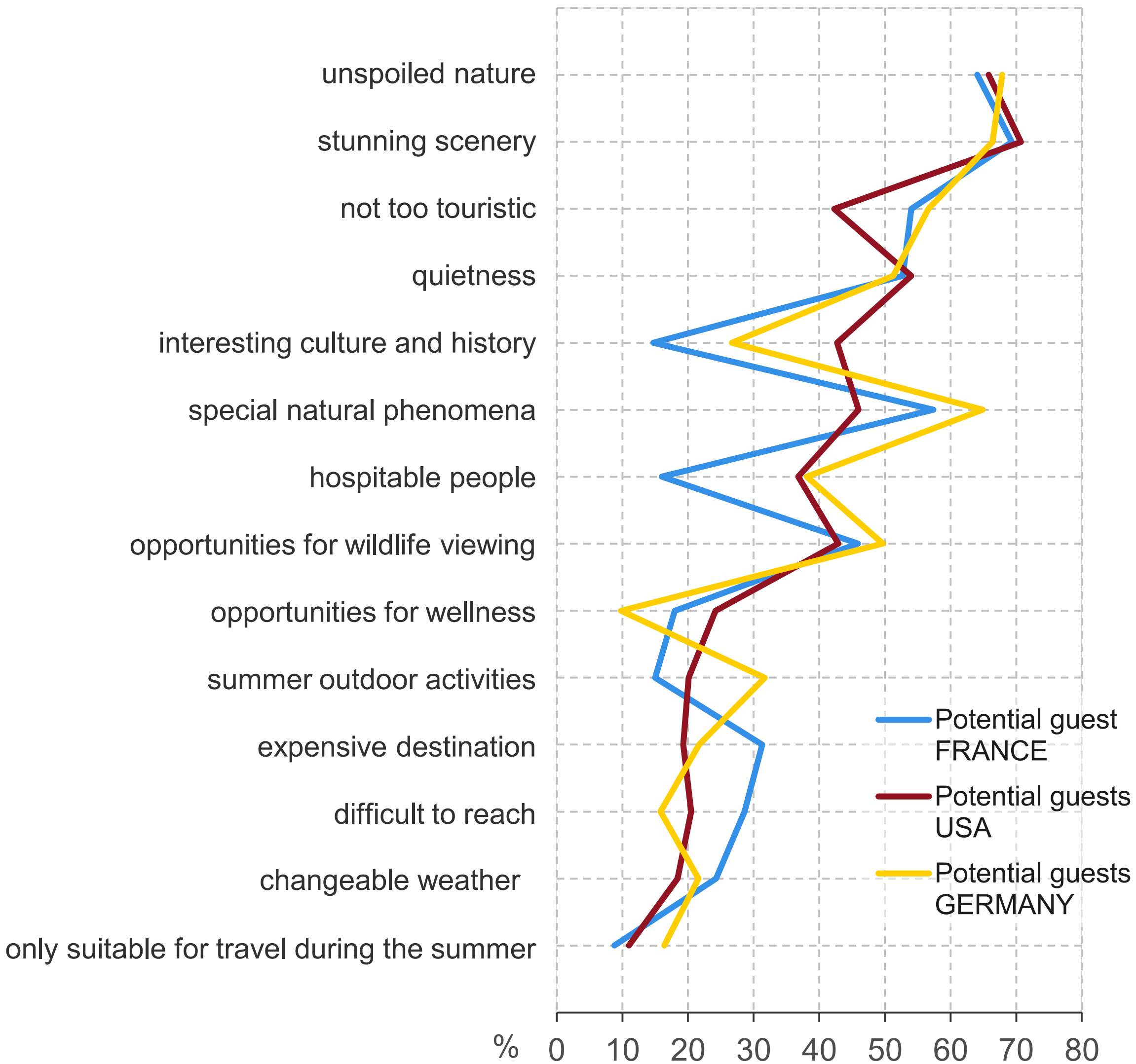
Greenland image comparison: Population of France and USA



- The image results of France are comparable with the results on the same question in the USA survey 2016.
- **More characteristic for the French** than for the Americans:
  - Expensive (+13%-pts.)
  - See the Arctic now (+11%-pts.)
  - Snow activities (+5%-pts.)
- **More characteristic for the Americans** than for the French:
  - Culture & history (+21%-pts.)
  - Hospitable people (+15%-pts.)
  - Stunning scenery (+13%-pts.)
- Generally, the Greenland image in the two markets is similar in many regards, the top characteristics are even the same: "Stunning scenery" and "Unspoiled nature".
- The French image profile is a bit more distinct than the American.

Q3: *Please tell me which of these characteristics do you think particularly apply to Greenland?*
Basis: All respondents in France and USA, aware of Greenland as a travel destination
(FR: n=3,519; USA: n=3,398)
Source: VG online surveys 2016/2017 by NIT/Ipsos

Greenland image comparison:
Potential Greenland travellers in FR/USA/GER



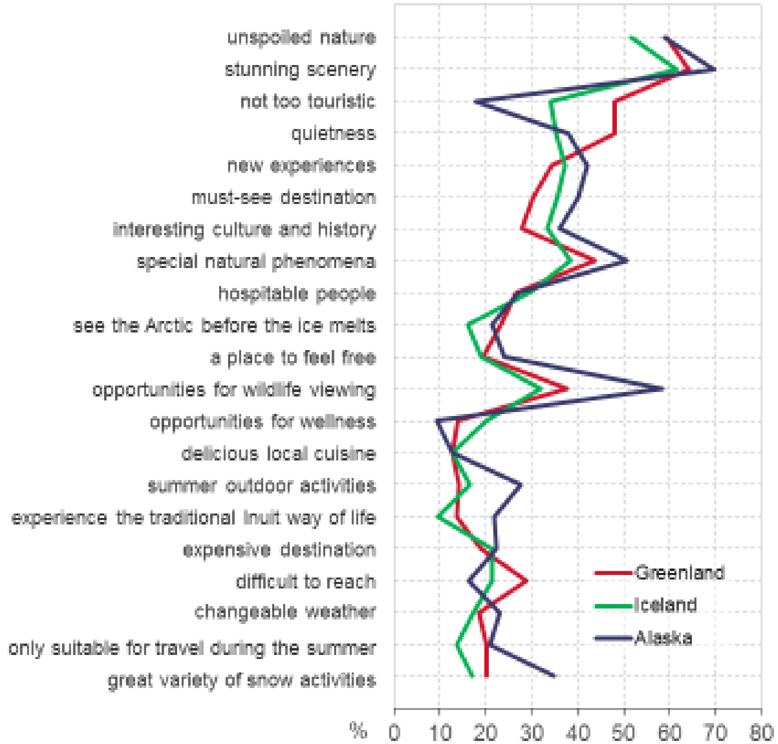
- This chart compares the image characteristics that are comparable in the image questions France (2017), USA (2016) and Germany (2012)
- **The most striking differences between the countries are ...**
  … natural phenomena and summer activities for Germany;
  … culture & history and wellness for USA;
  … expensive and difficult to reach for the French.
- Regarding the top characteristics the potential travellers to Greenland agree in the three markets: “Stunning scenery” and “Unspoiled nature”.
- Generally, the German and French image “lines” are very similar.

Q3: *Please tell me which of these characteristics do you think particularly apply to Greenland?*
Basis: Potential travellers to Greenland from France 2017 (n=357); from USA 2016 (n=739) and Germany 2012 (n=159)
Source: NATA/VG online surveys 2012/2016/2017 by NIT/Ipsos

Results from the USA survey 2016:
Image comparison Greenland, Iceland, Alaska

Image comparison: Greenland, Iceland, Alaska

[image questions were only asked in the US survey]



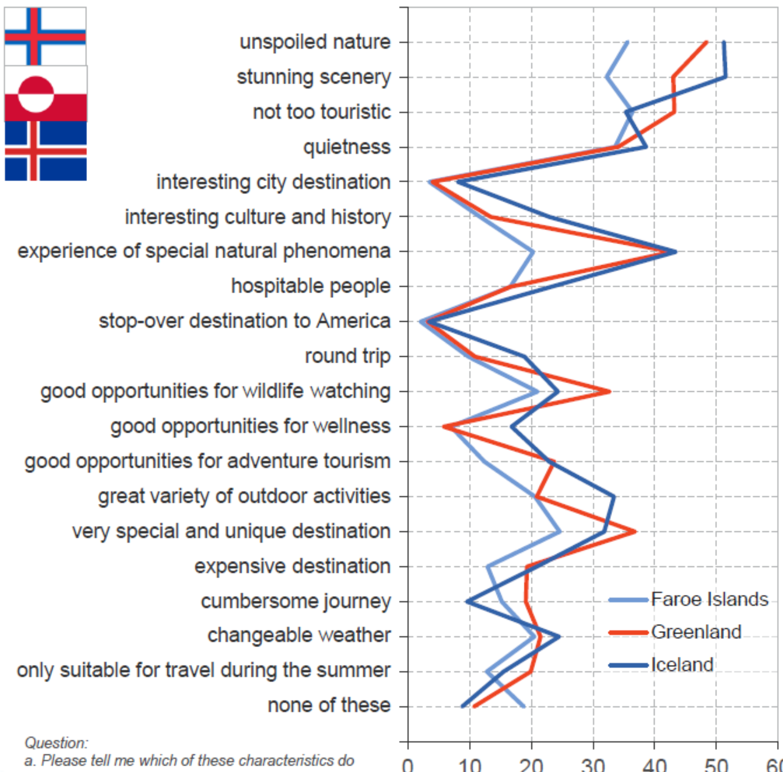
- Similar images of the three destinations: Key image factors of all three destinations are nature and scenery.
- Greenland and Iceland with an average of ca. 6 characteristics per person. Alaska with an average of almost 7.
- Greenland is seen as most characteristic regarding "not too touristic" and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

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

Results from the 2012 survey in Germany: Image comparison Greenland, Iceland, Faroe Islands

4. Image as holiday destinations

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



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

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

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

NATA North Atlantic Tourism Association

RA ReiseAnalyse 2012

64

To learn 2:
Image of Greenland on the French market

Image Greenland in France:

- In the mind of the people who are aware of Greenland as a holiday destination, it is known for its unspoiled nature, stunning scenery, for being not too touristic, as a place to find quietness, for its natural phenomena.
- It is not widely known for its cuisine, culture & history and for only being a summer-destination.
- Persons with interest to travel there much more often see Greenland's stunning scenery, as a "must-see" destination and a place to feel free than persons with NO interest to travel there.

Image benchmarking in France: Greenland and competitors

- When benchmarking the images of Greenland and its main competitors, Iceland, Lapland and Canada, we find that stunning scenery and unspoiled nature are important image factors for all the destinations.
- In fact the image profiles of Greenland, Iceland and Lapland are in many regards quite similar. Canada on the other hand is sticking out with a quite unique image profile.
- Greenland is sticking out over its three competitors regarding the following image characteristics: not too touristic, see the Arctic now, difficult to reach.
- The other destinations are sticking out over Greenland regarding the following characteristics …
  … wellness, hospitable people, culture&history for Iceland;
  … hospitable people, culture&history, new experiences for Lapland;
  … hospitable people, culture&history, summer activities for Canada.

Image comparison Greenland: France, USA, Germany

- Regarding the top characteristics, the potential travellers to Greenland agree in the three markets: "Stunning scenery" and "Unspoiled nature".
- The most striking differences between the countries are ...
  … natural phenomena and summer activities for Germany;
  … culture & history and wellness for USA;
  … expensive and difficult to reach for the French.

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

3. Product preferences of potential travellers when travelling to Greenland

Photo by Mads Pihl - Visit Greenland

Potential travellers to Greenland:
Preferred holiday experiences in Greenland

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	France	Germany	Great Britain	USA
glaciers/icebergs	76%	70%	79%	55%
stunning scenery (e.g. mountains, fjords, cliffs)	72%	81%	86%	64%
natural phenomena (e.g. northern lights, midnight sun)	70%	79%	84%	57%
wildlife (e.g. Whales, birds)	60%	70%	75%	55%
traditional villages	55%	50%	60%	47%
volcanoes/hot springs/geysers	47%	59%	72%	40%
new and unexpected experiences	44%	44%	60%	48%
contemporary culture/lifestyle	34%	29%	47%	39%
historic sights/events	27%	35%	55%	43%
capitals/cities	23%	27%	44%	30%

» For potential Greenland travellers in France it is most important to experience glaciers/icebergs, the stunning scenery and natural phaenomena.

» This ranking is somewhat different from the other three markets, where the stunning scenery and the natural phaenomena are more important than the glaciers/icebergs.

» On average 5.1 of the 10 aspects are of interest for potential Greenland travellers in France.

» This is a little less than in Great Britain and Germany and a little more than in the USA.

Q4: *When thinking about travelling to Greenland what would you like to see/experience?*
Basis: Potential travellers to Greenland from France(n=370) ,Germany (n=357), Great Britain (n=469) and the USA (n=739); Source: NATA/VG online surveys 2016/2017 by NIT/Ipsos

Potential travellers to Greenland: Preferred holiday activities in Greenland I

guided nature excursions	67%	61%	62%	61%
wildlife watching (e.g. whales, birds)	67%	68%	71%	56%
dog-sledding	64%	48%	46%	26%
photography	60%	67%	51%	47%
meeting and mingling with the locals	55%	43%	50%	36%
hiking	54%	58%	45%	44%
eating/drinking local specialities	51%	57%	63%	55%
learning about local handicraft	50%	39%	47%	32%
experience quietness	45%	56%	55%	35%
glacier hiking	44%	41%	38%	26%
guided cultural tours	34%	37%	46%	42%

- The most sought-after activities in Greenland by potential travellers from France are guided nature excursions, wildlife watching and dog-sledding.
- Compared with the other three markets, France is sticking out regarding guided nature tours, dog-sledding and meeting and mingling with the locals.
- Especially the results for dog-sledding are striking: 16%-pts. above the figure in Germany; Rank 3 compared to 7+ in the other markets.
- Also the high figure for meeting and mingling with the locals is an interesting result, taking into account that 'hospitable people' is not one of Greenland's strength in its image profile.

Q5: *Which of the following activities would you like to do when travelling to Greenland?*
Basis: Potential travellers to Greenland from France(n=370) ,Germany (n=357), Great Britain (n=469) and the USA (n=739); Source: NATA/VG online surveys 2016/2017 by NIT/Ipsos

Potential travellers to Greenland: Preferred holiday activities in Greenland II

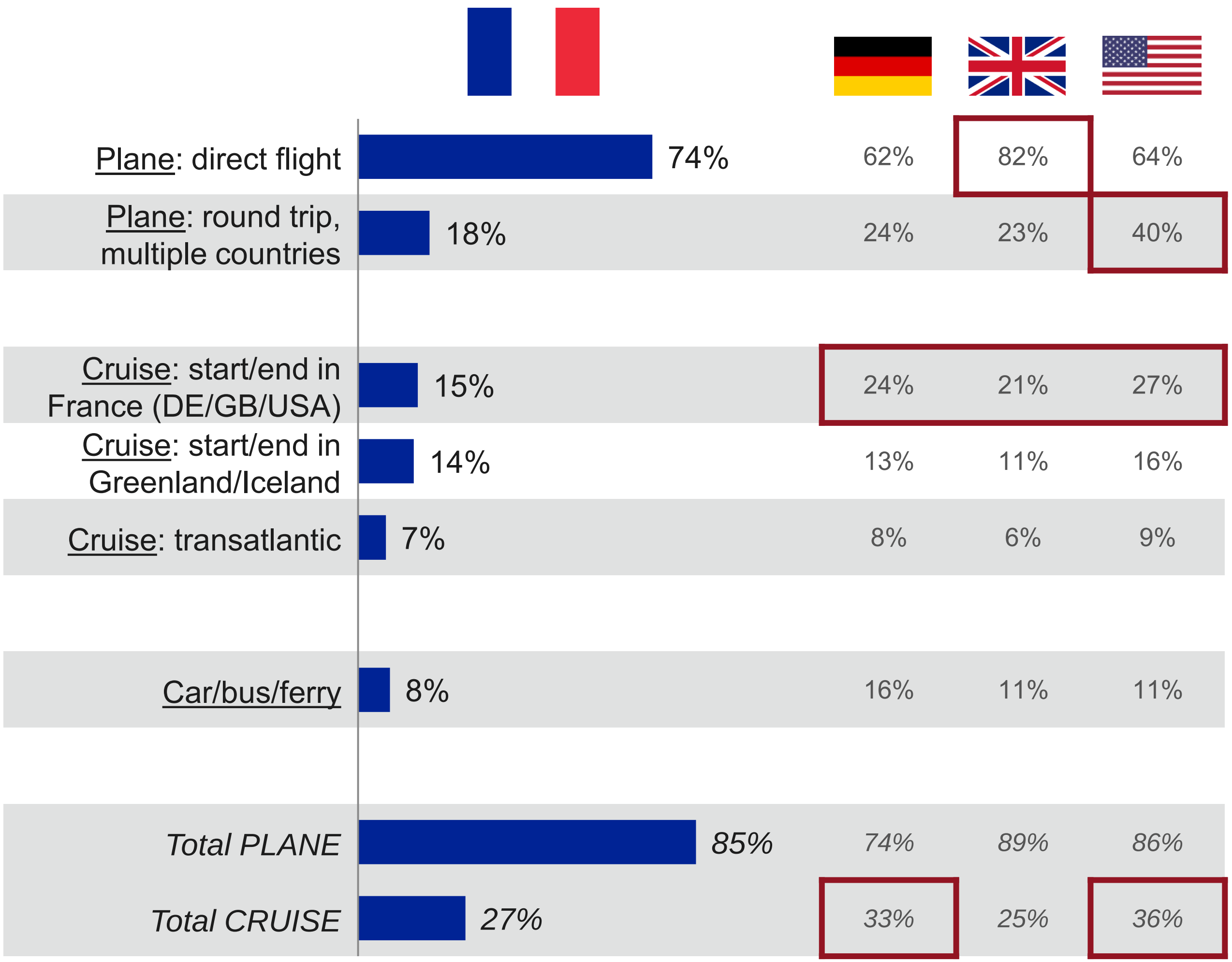
Swimming/wellness (e.g. in thermal baths	29%	30%	53%	30%
Shopping for souvenirs	26%	30%	49%	35%
fishing	18%	13%	15%	26%
kayaking	18%	23%	24%	27%
skiing	13%	10%	19%	17%
cold-water swimming	13%	-	-	-
cycling	11%	18%	20%	16%
horseback riding	6%	14%	22%	27%
trophy hunting	3%	2%	3%	5%
other	2%	4%	2%	2%

- 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 French market based ranking), which are mostly secondary or niche activities.
- Compared to the other three markets, France is not sticking out regarding any of the activities on this slide.
- This might also be an indicator that the French are a little more knowledgeable about the real offer in Greenland than the potential travellers in the other three markets.

Q5: *Which of the following activities would you like to do when travelling to Greenland?*
Basis: Potential travellers to Greenland from France(n=370) ,Germany (n=357), Great Britain (n=469) and the USA (n=739); Source: NATA/VG online surveys 2016/2017 by NIT/Ipsos

Potential travellers to Greenland: Preferences about getting to Greenland

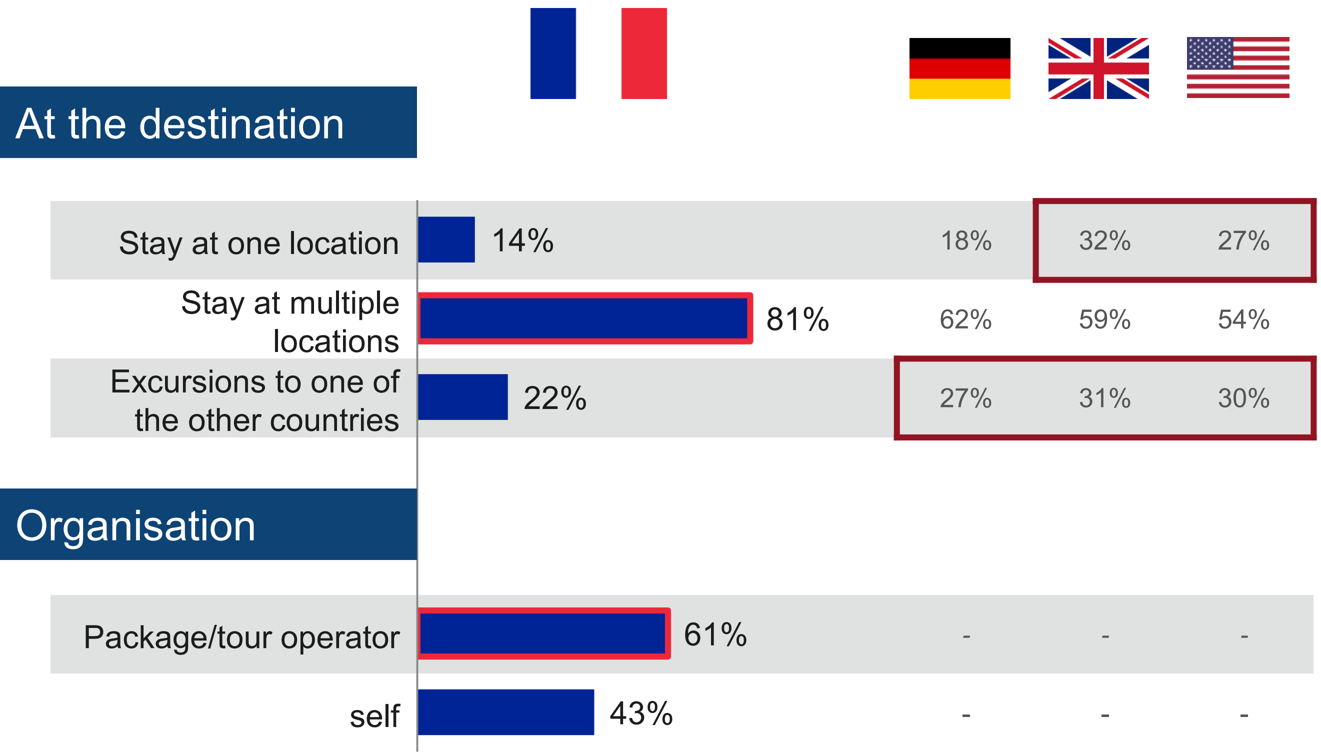
NEW INSIGHTS FOR TOURISM



- » Most potential Greenland travellers in France prefer direct flights to Greenland.
- » This is also true for the other three markets, yet the figure in France is higher than in Germany and the USA.
- » Less people than in the other markets want to visit Greenland during a multi country air trip.
- » There is a share of more than ¼ of the potential guests in France who want to visit Greenland as a cruise destination. This is less than in Germany and the USA and shows also in the actual visitor statistics of Greenland.
- » The comparably few car/ferry enthusiasts in France could again be an indicator that the French have a a realistic picture of what to expect in Greenland.

Q6: *How would you like to travel to Greenland?*
Basis: Potential travellers to Greenland from France(n=370) ,Germany (n=357), Great Britain (n=469) and the USA (n=739); Source: NATA/VG online surveys 2016/2017 by NIT/Ipsos

Potential travellers to Greenland: Preferences about getting around and organisation



- Over 80% of the potential Greenland travellers in France prefer visiting multiple locations while in Greenland. This is much more than in the other markets!
- 22% can imagine excursions to another country within the region. This figure is less than in all the other markets.
- Regarding the preferred organization of the trip, a majority of 61% would like to book a package trip when travelling to Greenland.
- This question has not been covered in the other three markets, hence there is no possibility for comparison.

Q6: *How would you like to travel to Greenland?*
Basis: Potential travellers to Greenland from France(n=370) ,Germany (n=357), Great Britain (n=469) and the USA (n=739); Source: NATA/VG online surveys 2016/2017 by NIT/Ipsos

Potential travellers to Greenland: Preferred sources for inspiration & information

Guide book	69%	54%	48%	43%
Internet search engine	67%	69%	77%	61%
Destination websites (e.g. greenland.com)	58%	35%	54%	51%
Travel magazine	45%	42%	36%	48%
Travel agent	37%	37%	31%	30%
Holiday review sites (e.g. TripAdvisor)	31%	27%	44%	36%
Books/literature	25%	41%	34%	35%
Personal relations (friend, family, co-worker)	24%	30%	20%	27%
Online booking agent (e.g. Expedia, Booking.com)	18%	22%	28%	23%
Social media (e.g. Facebook, Instagram, Twitter)	17%	15%	21%	25%
Newspaper	7%	12%	11%	16%
Previous experience	6%	10%	5%	12%

- The paper guide book is the most popular source for information of potential travellers in France when planning a trip to Greenland.
- It is followed by internet search engines, destination websites, travel magazines and travel agencies.
- This shows that you need a marketing mix of online and offline sources.
- Compared with the other markets, the high figure for the paper guide book is striking, also the use of destination websites and travel agencies is higher than in most of the other markets.
- Social Media is used less in France and Germany than in Great Britain and the USA.

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 France(n=370) ,Germany (n=357), Great Britain (n=469) and the USA (n=739); Source: NATA/VG online surveys 2016/2017 by NIT/Ipsos

Potential travellers to Greenland (*Age segments*): Preferred sources for inspiration & information

	Total population	„Millenials“ (18-39 yrs.)	„Baby boomer“ (50-75 yrs.)
Guide book	69%	65%	77%
Internet search engine	67%	65%	73%
Destination websites (e.g. greenland.com)	58%	55%	62%
Travel magazine	45%	40%	49%
Travel agent	37%	30%	45%
Holiday review sites (e.g. TripAdvisor)	31%	33%	27%
Books/literature	25%	19%	31%
Personal relations (friend, family, co-worker)	24%	29%	17%
Online booking agent (e.g. Expedia, Booking.com)	18%	21%	15%
Social media (e.g. Facebook, Instagram, Twitter)	17%	26%	8%
Newspaper	7%	8%	6%
Previous experience	6%	7%	4%

- » This slide takes a deeper look if there are differences between age segments regarding the preferred sources for inspiration and information.
- » We see that the ranking of the preferred sources hardly differs between “millennials” and “baby boomers”.
- » Nevertheless the share of persons using “traditional” sources, such as guide books, travel magazines and travel agencies is higher with the “baby boomers” whereas the shares of persons using online booking agents and social media is higher with the “millennials”.
- » Interesting: The share for internet search and destination websites is higher with the “baby boomers”; personal relations is higher with the “millennials”

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 France(n=370) ,Germany (n=357), Great Britain (n=469) and the USA (n=739); Source: NATA/VG online surveys 2016/2017 by NIT/Ipsos

Potential travellers to Greenland: Preferred kind of online content

Pictures of the destination, its natural/cultural attractions	74%	72%	82%	76%
Pictures of accommodations/ activities/tours	62%	54%	69%	65%
Texts on how to get there/get around, where to stay, to eat & go shopping	58%	54%	57%	51%
Texts from other travellers with recommendations what to do there	54%	41%	46%	44%
Videos of nature/landscapes incl. natural phenomena	51%	51%	54%	51%
Texts with stories by locals about their daily life/culture	48%	33%	38%	35%
Contact options, where to find specific information/travel offers	46%	31%	43%	38%
Videos about local cultural traditions/lifestyle/art	39%	35%	41%	42%
Destination companies' newsletters	18%	19%	28%	24%
Social media posts/stories	16%	10%	18%	20%

- When asked for their preferred kind of online content, most potential Greenland guests in France 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.
- Compared with the other three markets, France is sticking out in terms of recommendation texts from other travellers and texts by the locals about their life (*Again, this is interesting taking into account, that 'hospitable people' is not an image strength of Greenland*).

Q8: *Which kind of content do you like to find when looking for online information about Greenland?;*
Basis: Potential travellers to Greenland from France(n=370) ,Germany (n=357), Great Britain (n=469) and the USA (n=739); Source: NATA/VG online surveys 2016/2017 by NIT/Ipsos

Potential travellers to Greenland (*Age segments*): Preferred kind of online content

	Total population	„Millenials“ (18-39 yrs.)	„Baby boomer“ (50-75 yrs.)
Pictures of the destination, its natural/cultural attractions	74%	73%	74%
Pictures of accommodations/ activities/tours	62%	57%	65%
Texts on how to get there/get around, where to stay, to eat & go shopping	58%	59%	58%
Texts from other travellers with recommendations what to do there	54%	54%	56%
Videos of nature/landscapes incl. natural phenomena	51%	51%	48%
Texts with stories by locals about their daily life/culture	48%	44%	52%
Contact options, where to find specific information/travel offers	46%	37%	56%
Videos about local cultural traditions/lifestyle/art	39%	34%	42%
Destination companies' newsletters	18%	13%	23%
Social media posts/stories	16%	19%	12%

- This slide takes a deeper look if there are differences between age segments regarding the preferred kind of online content.
- We see that the ranking of the preferred online content hardly differs between "millennials" and "baby boomers".
- In many aspects, also the share of persons in both age segments are very similar.
- In some aspects, the "baby boomers" show a stronger preference than the "millennials"
- For the "millennials" only have a stronger preference regarding social media content.

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 France(n=370) ,Germany (n=357), Great Britain (n=469) and the USA (n=739); Source: NATA/VG online surveys 2016/2017 by NIT/Ipsos

To learn 3:
Product preferences of potential travellers to Greenland

NIT NEW INSIGHTS FOR TOURISM

Experiences:

- For potential Greenland travellers in France it is most important to experience glaciers/icebergs, the stunning scenery and natural phaenomena. This ranking is somewhat different from the other three markets, where the stunning scenery and the natural phaenomena are more important than the glaciers/icebergs.
- On average 5.1 of the 10 aspects are of interest for potential Greenland travellers in France. This is a little less than in Great Britain and Germany and a little more than in the USA.

Activities:

- The most sought-after activities in Greenland by potential travellers from France are guided nature excursions, wildlife watching and dog-sledding.
- Compared with the other three markets, France is sticking out regarding guided nature tours, dog-sledding and meeting and mingling with the locals. Especially the results for dog-sledding are striking: 16%-pts. above the figure in Germany; Rank 3 compared to 7+ in the other markets.

Getting there/around:

- Most potential Greenland travellers in France would prefer direct flights into Greenland. Less people than in the other markets want to visit Greenland during a multi country air trip. There is a share of more than ¼ of the potential guests in France who want to visit Greenland as a cruise destination. This is less than in Germany and the USA and shows also in the actual visitor statistics of Greenland.

Information sources:

- The paper guide book is the most popular source for information for potential travellers in France when planning a trip to Greenland. It is followed by internet search engines, destination websites, travel magazines and travel agencies. This shows that you need a marketing mix of online and offline sources.

Online content:

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

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

4. Socio-demographic profiles of potential travellers to Greenland

Photo by Mads Pihl - Visit Greenland

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

Gender

Male	55%	50%	51%	49%
Female	45%	50%	49%	51%

Age

16-19 years	2%	10%	4%	7%
20-29 years	24%	23%	26%	28%
30-39 years	17%	19%	23%	31%
40-49 years	17%	17%	18%	11%
50-59 years	20%	20%	16%	11%
60-75 years	20%	10%	14%	13%

» The potential Greenland travellers in France are more often male than female. In the other three markets they are quite evenly distributed on both sexes.

» The age structure of potential Greenland travellers in France is well balanced over the 10 year cohorts between 20 and 75.

» In France, more than half of the potential travellers are 40 years and above. In the USA more than 60% are below 40 years old. Germany and Great Britain are in-between these extremes.

Basis: Potential travellers to Greenland from France(n=370) ,Germany (n=357), Great Britain (n=469) and the USA (n=739)
Source: NATA/VG online surveys 2016/2017 by NIT/Ipsos

Potential travellers to Greenland: Demographics II (working & marital status)

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Working status

Employee	58%	56%	58%	61%
Self-employed	5%	6%	8%	6%
Not working	9%	6%	10%	5%
Housewife/-man	4%	3%	6%	8%
Retired	18%	9%	10%	10%
Pupil/student In education	6%	21%	8%	10%

Marital status

Maried/with partner	63%	54%	57%	59%
Single	31%	38%	35%	35%
Previously married, no partner in household	7%	8%	9%	7%

- » Concerning their working status, the biggest group of potential Greenland travellers in France is made up of employees.
- » This is also true for the other three markets.
- » In France the share of retired persons sticks out (in line with the older age structure of potential travellers); in Germany the students stick out.
- » Concerning their marital status, couples are dominating.
- » This is also true for the other three markets, yet France has the highest share of couples in all the markets.

Basis: Potential travellers to Greenland from France(n=370) ,Germany (n=357), Great Britain (n=469) and the USA (n=739)
Source: NATA/VG online surveys 2016/2017 by NIT/Ipsos

Potential travellers to Greenland: Demographics III (household composition)

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Size of household

1 person	20%	21%	16%	20%
2 persons	36%	33%	35%	27%
3 persons	20%	21%	20%	19%
4 persons or more	23%	26%	29%	35%

Children ≤18y.

Yes	29%	31%	28%	$\boxed{42\%}$
No	71%	69%	72%	58%

- More than half of the potential Greenland travellers in France live in households of one or two persons, and less than half in households with three and more persons.
- Most potential Greenland travellers in France live in households without kids.
- In terms of household size and children in household, the potential Greenland travellers in France do not differ much from those in the other three markets.
- Regarding children in the household, in the USA the share of persons living with kids is significantly overrepresented compared with the other markets.

Basis: Potential travellers to Greenland from France(n=370) ,Germany (n=357), Great Britain (n=469) and the USA (n=739)
Source: NATA/VG online surveys 2016/2017 by NIT/Ipsos

Potential travellers to Greenland: Demographics IV (education & income)

Education

primary/ lower secondary education	*5%*	3%
vocational upper secondary education	*18%*	12%
upper secondary education	*23%*	19%
higher education (2 years)	*23%*	25%
higher educaion (3-4 years, bachelor, master 1)	*18%*	18%
higher education (5 years, master 2, doctorate)	*14%*	23%

Income

up to 12,000 Euro	*11%*	10%
12,001 - 24,000 Euro	*27%*	28%
24,001 - 36,000 Euro	*28%*	26%
36,001 - 48,000 Euro	*16%*	16%
48,001 - 60,000 Euro	*11%*	10%
60,001 Euro or more	*6%*	9%

» Regarding their formal education, we find that potential Greenland travellers in France have a higher education than the average French person.

» The income structure of potential Greenland travellers is quite similar to that of the French population.

» The majority of potential Greenland travellers (61%) in France have an annual household net income of above 24,000 €.

Basis: Potential travellers to Greenland from France(n=370), income: only with response regarding income (n=333)
Source: VG online survey 2017 by NIT/Ipsos

Potential travellers to Greenland: Demographics V (regional origin)

Regions

Nielsen I (Ile de France)	*19%*	24%
Nielsen II (North + North East)	*20%*	18%
Nielsen III (North West + West)	*19%*	18%
Nielsen IV (Centre + East)	*18%*	15%
Nielsen V (South)	*14%*	18%

Size of community

up to 19,999 Inhabitants	*38%*	37%
20,000-99,999 Inhabitants	*14%*	12%
100,000-199,999 Inhabitants	*5%*	5%
200,000+ Inhabitants	*43%*	46%

- The regional structure of potential Greenland travellers is quite similar to that of the French population.
- Nielsen I (Ile de France) and V (South) are slightly overrepresented.
- Most potential Greenland guests in France live in larger cities of 100,000 inhabitants or more (55%).
- Generally, the structure of potential Greenland guests regarding the size of their home community is very similar to that of the French population.

Basis: Potential travellers to Greenland from France(n=370)
Source: VG online survey 2017 by NIT/Ipsos

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

- Gender: There are a little more males than females within the potential Greenland travellers in France.
- Age: In France, more than half of the potential travellers are 40 years and above. In the USA more than 60% are below 40 years old. Germany and Great Britain are in-between these extremes.
- Education: Regarding their formal education, we find that potential Greenland travellers in France have a higher education than the average French person.
- Marital status: Concerning the marital status of the potential Greenland travellers in France, couples are dominating. This is also true for the other three markets, yet France has the highest share of couples in all the markets.
- Monthly household net income: The income structure of potential Greenland travellers is quite similar to that of the French population. The majority of potential Greenland travellers (61%) in France have an annual household net income of above 24,000 €.
- Regional structure: The regional structure of potential Greenland travellers is quite similar to that of the French population. Nielsen I (Ile de France) and V (South) are slightly overrepresented. Most potential Greenland guests in France live in larger cities of 100,000 inhabitants or more (55%).

- In most regards, the demographic profiles of potential Greenland travellers in France do not differ much from the population. This means you do not have to take peculiarities into account when addressing them.
- On the other hand, the small but noticeable differences with the population and/or between the four markets may show opportunities for specific targeting (e.g. high education level, quite old age).
- As explained before, we are identifying a very wide potential for Greenland. For marketing activities in the markets it can be sensible to add to the regional structure of potential guests the accessibility of Greenland (e.g. Icelandair airports) for a geographical focus.

5. Visit Greenland segmentation of potential travellers

Photo by Mads Pihl - Visit Greenland

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

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Interest focus

Predominantly culture	11%	7%	21%	24%
Predominantly nature	17%	25%	12%	11%
Culture and nature	60%	51%	44%	46%
Special interest*	3%	3%	5%	7%
Other	10%	14%	19%	13%

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

Engagement level

Total immersion into local nature/culture	11%	7%	7%	14%
Get to know and experience local nature/culture	36%	52%	48%	53%
Observe and look at local nature/culture	43%	28%	27%	21%

- 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 France as in the other three markets. Yet, the figure for culture and nature is by far the highest in France.
- In France, the “observation” dimension ranks highest in terms of engagement. This is special compared to the other three markets, where the “experience” dimension receives the highest approval.

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 France (n=4,000), in Germany (n=4,000), Great Britain (n=4,000) and USA (n=4,000); Source: NATA/VG online surveys 2016/2017 by NIT/Ipsos

Visit Greenland segmentation: France (*population*)

INTEREST FOCUS

ENGAGEMENT LEVEL	Culture	Culture&Nature	Nature	Personal Challenge
Immersion	9% Ethnophile		2% Wilderness Seeker	3% Special Interest
Interaction	5% Culture Lover	26% Globetrotter	5% Nature Lover	
Observation	4% Culture Appreciator	28% Sightseer	10% Nature Appreciator	*10% no segment*

Q1a: *When you travel in general, is it the destination's nature or culture that you want to experience? Or is it something else that motivates you to travel?*
Q1b: *When you travel in general, how close do you want to engage with the destination's nature or culture? Do you stand back and observe? Do you totally immerse yourself by, for example, living in the home of a local? Or are you somewhat in between?*
Basis: All respondents in France (n=4,000); Source: VG online survey 2017 by NIT/Ipsos

Visit Greenland segmentation (*population*)

NIT
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Ethnophile	9%	4%	5%	12%
Culture Lover	5%	4%	12%	14%
Culture Appreciator	4%	2%	7%	4%
Globetrotter	26%	33%	28%	30%
Sightseer	28%	15%	13%	10%
Wilderness Seeker	2%	3%	1%	2%
Nature Lover	5%	13%	5%	5%
Nature Appreciator	10%	10%	6%	4%
Special Interest	3%	3%	5%	7%

- In the French population, Sightseers and Globetrotters are by far the dominating segments, with shares of 28% and 26%.
- The next important segments are the Nature Appreciators (10%) and Ethnophiles (9%).
- All other segments have shares of 5% and below.
- The high share of Sightseers is unique for France compared to the other three destinations. Here the Globetrotters are by far the dominating segment.
- Regarding the Culture lovers, you find many more in the USA and UK than in France.
- Regarding the Nature Lovers, you find many more in Germany than in France.

Q5: *Which of the following activities would you like to do when travelling to Greenland?*
Basis: Potential travellers to Greenland from France(n=370) ,Germany (n=357), Great Britain (n=469) and the USA (n=739); Source: NATA/VG online surveys 2016/2017 by NIT/Ipsos

Interest focus & engagement level: France (*potential Greenland travellers; Age segments*)

Interest focus

	Total population	„Millenials“ (18-39 yrs.)	„Baby boomer“ (50-75 yrs.)
Predominantly culture	9%	9%	9%
Predominantly nature	15%	17%	13%
Culture and nature	70%	70%	73%
Special interest*	2%	2%	1%
Other	3%	2%	4%

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

Engagement level

	Total population	„Millenials“ (18-39 yrs.)	„Baby boomer“ (50-75 yrs.)
Total immersion into local nature/culture	19%	22%	18%
Get to know and experience local nature/culture	43%	47%	36%
Observe and look at local nature/culture	35%	29%	43%

- This slide covers the interest focus and engagement level within the potential Greenland guests.
- It shows, that the focus on culture and nature is even bigger than in the French population. Regarding the engagement level, more of the potential Greenland travellers than in the population are ready to immerse a bit deeper into the local nature/culture.
- Regarding the differences between “millennials” and “baby boomers”, we see only very slight differences concerning the interest focus but bigger variations when it comes to the 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 France (n=4,000), in Germany (n=4,000), Great Britain (n=4,000) and USA (n=4,000); Source: NATA/VG online surveys 2016/2017 by NIT/Ipsos

Visit Greenland segmentation:
France (*potential Greenland travellers*)

		INTEREST FOCUS			
ENGAGEMENT LEVEL		Culture	Culture&Nature	Nature	Personal Challenge
	Immersion	16% Ethnophile		3% Wilderness Seeker	2% Special Interest
	Interaction	3% Culture Lover	34% Globetrotter	5% Nature Lover	
	Observation	3% Culture Appreciator	24% Sightseer	7% Nature Appreciator	*3% no segment*

Q1a: *When you travel in general, is it the destination's nature or culture that you want to experience? Or is it something else that motivates you to travel?*
Q1b: *When you travel in general, how close do you want to engage with the destination's nature or culture? Do you stand back and observe? Do you totally immerse yourself by, for example, living in the home of a local? Or are you somewhat in between?*
Basis: Potential travellers to Greenland from France (n=370), Source: VG online survey 2017 by NIT/Ipsos

Visit Greenland segmentation (*potential Greenland travellers*)

Ethnophile	16%	10%	12%	26%
Culture Lover	3%	2%	11%	12%
Culture Appreciator	3%	2%	3%	1%
Globetrotter	34%	41%	38%	36%
Sightseer	24%	10%	10%	7%
Wilderness Seeker	3%	5%	2%	4%
Nature Lover	5%	14%	8%	4%
Nature Appreciator	7%	7%	3%	1%
Special Interest	2%	5%	7%	6%

- Looking at the potential Greenland travellers in France, the Globetrotters with a share of 34% are dominating.
- Second come the Sightseers with 24% and the Ethnophiles with 16%.
- All other segments have shares of 7% and below.
- The high share of Sightseers is unique for France compared to the other three destinations.
- Regarding the Culture lovers, you find many more in the USA and UK than in France.
- Regarding the Nature Lovers, you find many more in Germany than in France.

Q5: *Which of the following activities would you like to do when travelling to Greenland?*
Basis: Potential travellers to Greenland from France(n=370) ,Germany (n=357), Great Britain (n=469) and the USA (n=739); Source: NATA/VG online surveys 2016/2017 by NIT/Ipsos

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 France as in the other three markets. Yet, the figure for culture and nature is by far the highest in France.
- » In France, the "observation" dimension ranks highest in terms of engagement. This is special compared to the other three markets, where the "experience" dimension receives the highest approval.

Segments:

- » Looking at the potential Greenland travellers in France, the Globetrotters with a share of 34% are dominating. Second come the Sightseers with 24% and the Ethnophiles with 16%. All other segments have shares of 7% and below.
- » The high share of Sightseers is unique for France compared to the other three destinations.
- » Regarding the Culture lovers, you find many more in the USA and UK than in France.
- » Regarding the Nature Lovers, you find many more in Germany than in France.

- » The Visit Greenland segmentation approach is on the one hand very helpful to further understand the potential Greenland travellers in France and the other three markets, on the other hand it enables us to target the different segments according to their size and needs.
- » The segmentation approach helps to learn about what the four 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 France in Annex A of this report.

Photo by Air Zafari & Mads Pihl - Visit Greenland

Population: Reasons against travelling to Greenland

[DE: Greenland/Iceland/Faroe Islands]

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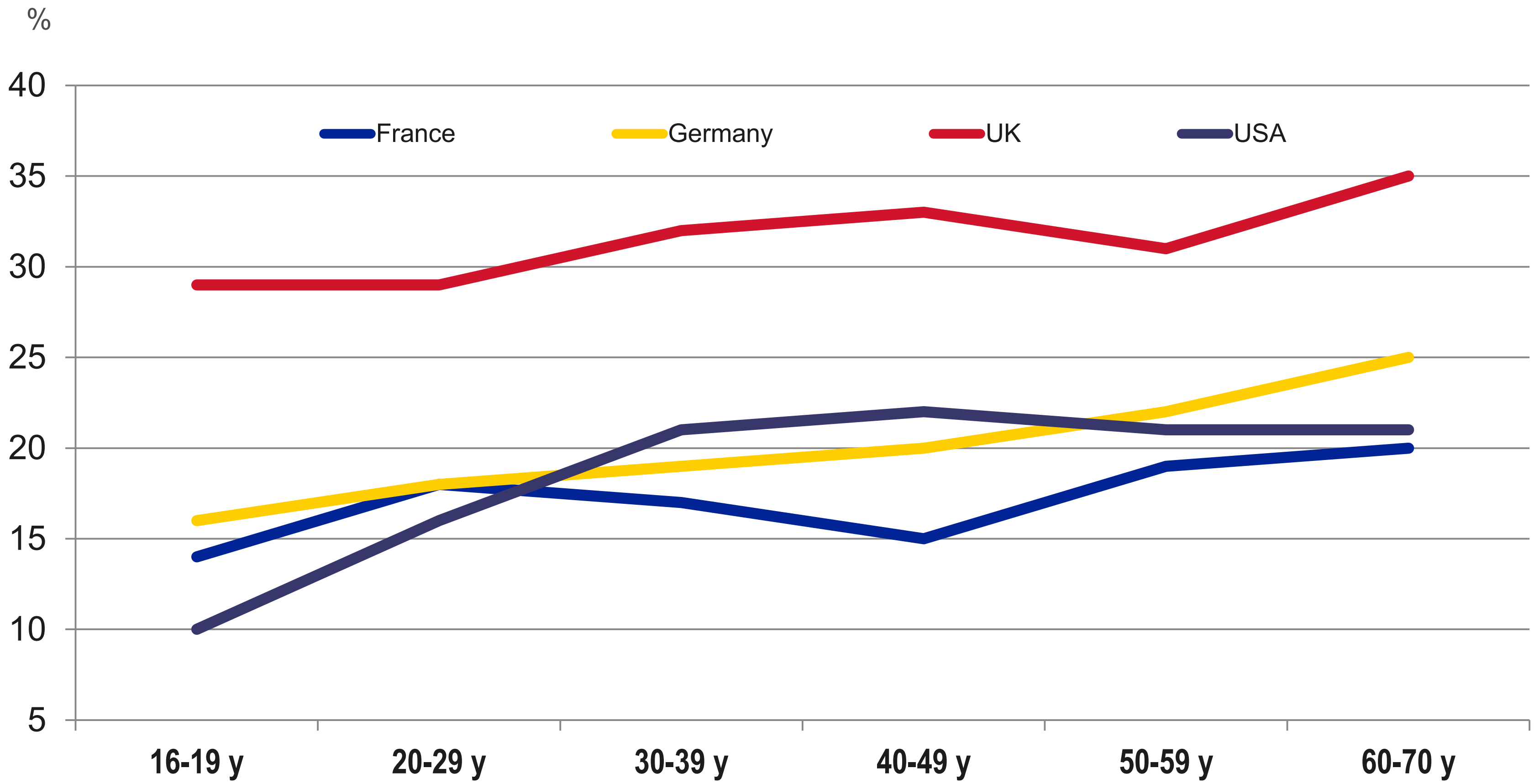
Too expensive	46%	38%	22%	38%
Cold climate	31%	30%	18%	30%
Bad weather	14%	20%	11%	19%
Poor accessibility	13%	14%	10%	19%
Whale hunting	11%	12%	10%	9%
Doubts about adequate accommodation	8%	5%	4%	9%
Low quality of tourism services	3%	4%	4%	8%
Other destinations are more interesting	11%	14%	12%	18%
I would not know what to do there	7%	7%	12%	16%
I have not yet thought of going there	25%	21%	30%	26%
There are no reasons against going there	18%	21%	32%	20%

- One of the final questions in the survey is dealing with possible reasons against travelling to Greenland.
- The good news first: 18% of the French have no general objections to travel to Greenland.
- Most important reasons against travelling to Greenland are the expected high costs, followed by the coldness and bad weather.
- In France, the high costs are dominating as in no other market.
- There are also important factors in pla, that are not directly linked to the tourism offer in Greenland (marked grey).

Q9: *What are in your opinion reasons against travelling to Greenland (DE: Greenland, Iceland, Faroe Islands)?*
Basis: All respondents from France (n=4,000), Germany (n=4,000), Great Britain (n=4,000) and the USA (n=4,000) ; Source: NATA/VG online surveys 2016/2017 by NIT/Ipsos

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



Q9: *What are in your opinion reasons against travelling to Greenland (DE: Greenland, Iceland, Faroe Islands)?*
Basis: All respondents from France (n=4,000), Germany (n=4,000), Great Britain (n=4,000) and the USA (n=4,000) ; Source: NATA/VG online surveys 2016/2017 by NIT/Ipsos

Potential travellers: Reasons against travelling to Greenland

[DE: Greenland/Iceland/Faroe Islands]

Too expensive	62%	50%	47%	45%
Poor accessibility	15%	20%	18%	20%
Cold climate	14%	20%	13%	29%
Whale hunting	12%	20%	19%	17%
Bad weather	11%	14%	16%	21%
Doubts about adequate accommodation	7%	9%	5%	12%
Low quality of tourism services	5%	7%	4%	12%
Other destinations are more interesting	4%	6%	6%	11%
I would not know what to do there	1%	2%	4%	10%
I have not yet thought of going there	6%	5%	7%	8%
There are no reasons against going there	22%	25%	29%	21%

- » Even more important than knowing reasons against Greenland in the population is knowing the possible barriers for the potential Greenland guests.
- » Here we see 22% of the potential Greenland travellers in France with no objections.
- » Regarding the actual barriers, the results in France are even more clear than in the other three markets: The high costs!
- » All other possible reasons against travelling to Greenland are in France much below the figures in the other three markets.
- » Also, there are only very few doubts about the quality of the tourism service and infrastructure in Greenland.

Q9: *What are in your opinion reasons against travelling to Greenland (DE: Greenland, Iceland, Faroe Islands)?*
Basis: Potential travellers to Greenland from France(n=370) ,Germany (n=357), Great Britain (n=469) and the USA (n=739); Source: NATA/VG online surveys 2016/2017 by NIT/Ipsos

To learn 6:
Reasons against travelling to Greenland

Population:

» 18% of the French have no general objections to travel to Greenland. Most important reasons against travelling to Greenland are the expected high costs, followed by the coldness and bad weather. In France, the high costs are dominating as a barrier as in no other market.

Potential guests:

» 22% of the potential Greenland travellers in France with no objections. Regarding the actual barriers, the results in France are even more clear than in the other three markets: The high costs!

» All other possible reasons against travelling to Greenland are in France much below the figures in the other three markets. Also, there are only very few doubts about the quality of the tourism service and infrastructure in Greenland.

Age groups:

» Demographically you find some differences regarding reasons against travelling to Greenland in the different age groups. Generally, the younger age groups (16-29) have more obstacles, the older age groups (50-70) less. This is similar in all the four markets

» The results of Chapter 1 show a huge potential of potential Greenland travellers in the France and the other three markets.

» To transform 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, e.g. in the segments and the age groups, which might help you for more precise targeting.

Excursus:
Looking for the "harder" potential for Greenland in France

Background and definition:

» Visit Greenland has asked if it was possible to narrow down the "total" potential to a "harder" potential, and at the same time still having enough interviews to base reliable analyses on.

» One way to do this is to look only at those potential Greenland travellers with no reasons against travelling to Greenland. In France we identify 88 interviewees with this definition.

Destination expectations:

» Regarding all questions about the destinations experiences, the results between the "total" potential as described in chapter 3 and this "harder" potential are very similar. The rankings remain the same in all of the questions.

» Regarding experiences, activities and how to travel there, we find that the "harder" potential is slightly more often looking for traditional villages, for glacier walking and cultural tours, for multiple locations or excursions to Iceland.

» They are a little more into organizing the holiday themselves, into reading travel magazines and relying on personal relations when planning the holiday, and a little more into social media content.

Segments:

» The ranking between "total" and "harder" potential remains the same between both groups, nevertheless, you find more globetrotters and less sightseers in the "harder" potential.

Socio-demography:

» Again results are very similar and rankings alike between "total" and "harder" potential.

» The "harder" potential is even a bit older than the "total" potential, their education is a bit higher and we find more retirees and self-employed. Also the income level is a bit higher with the "harder" potential.

» These results show that it can make sense "to dig a bit deeper" into the data to find additional information and to be sure about the conclusions you have drawn based on the results of the "total" potential.

» The results give you some ideas on where to "refine" your marketing in order to attract a group within the "total" potential that might be a little easier to attract than the rest.

» On the other hand, the results confirm the findings for the "total" potential and should always be seen in context with them. So this analysis should not be a replacement of the results of the "total" potential but rather an interesting addition.

7. Competitive situation for Greenland

Photo by Mads Pihl - Visit Greenland

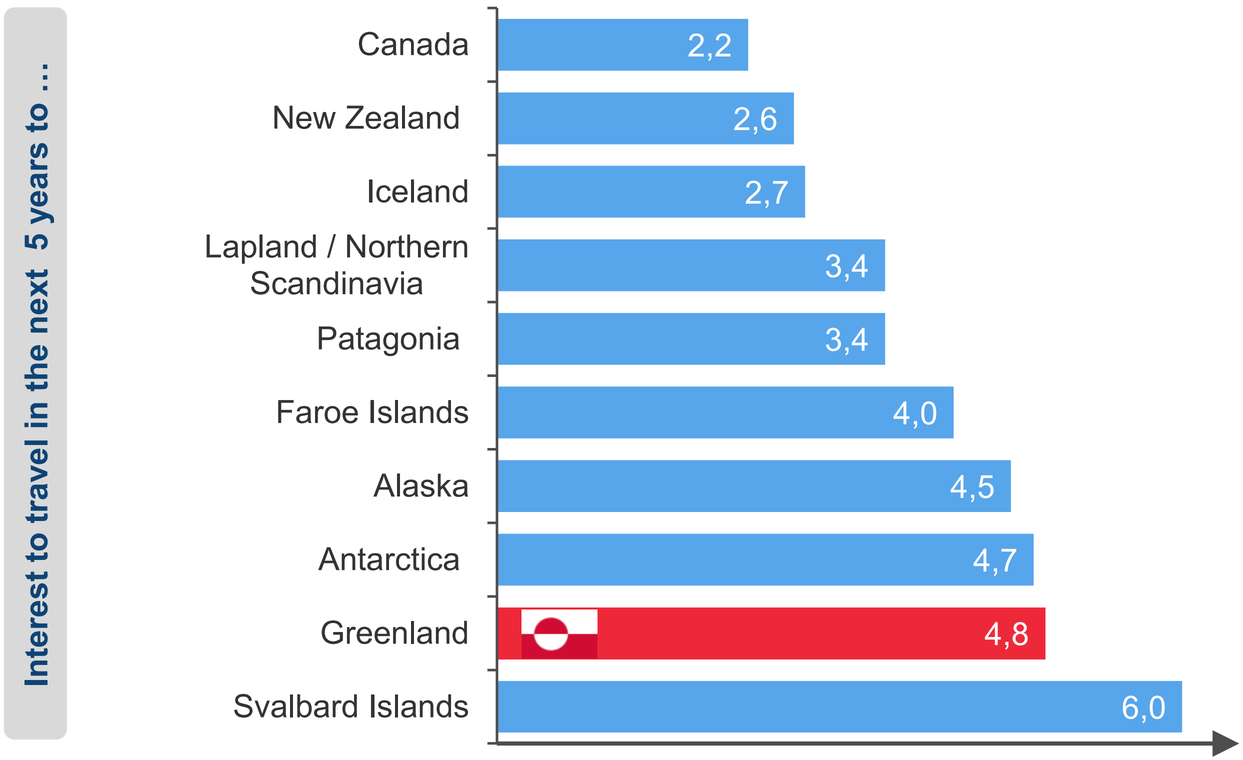
Competition: Which other destinations are of interest for the potential travellers to Greenland?

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%*	*6%*	*2%*
Iceland	77%	28%	10%
Canada	70%	24%	20%
Lapland / Northern Scandinavia	66%	9%	8%
New Zealand	63%	13%	6%
Alaska	52%	3%	3%
Patagonia	50%	4%	4%
Antarctica	42%	2%	1%
Faroe Islands	34%	3%	3%
Svalbard Islands	23%	2%	2%

- In France, potential travellers to Greenland are also interested in 4.8 other remote destinations in our question set.
- The fiercest competitors are Iceland and Canada. 77% resp. 70% of the potential Greenland travellers also want to go there.
- These are followed by Lapland and New Zealand.
- Looking further into the details, there is a high likelihood that the potential Greenland travellers end up in Iceland and Canada (and to a lesser extent in Lapland 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: Basis: Potential travellers from France to Greenland (n=370); Source: VG online survey 2017 by NIT/Ipsos

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



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

- The French 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 Canada, with 2.2 alternatives is the least ‘exchangeable’ destination. Svalbard Islands, in comparison, is the easiest to exchange.
- Greenland, with 4.8 alternatives, is also facing a fierce competition with the other nine destinations in our set of remote destinations.

Which of these destinations would you like to visit within the next 5 years?
Basis: Potential travellers to the respective destinations in France; Source: VG online survey 2017 by NIT/Ipsos

Product expectations of potential travellers to Greenland/Iceland/Lapland/Canada

» The next chapter is benchmarking the product expectations of the potential travellers to Greenland, Iceland, Lapland and Canada.

» Technically, it was necessary that each respondent answered the following questions only concerning one destination.

» This made 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	… Lapland/Northern Scandinavia	… Canada
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	All persons interested in travelling to Canada but not interested to travel to Lapland, to Iceland or to Greenland
Interviews	n=357	n=1,333	n=274	n=853

Source: VG online survey 2017 by NIT/Ipsos

Potential travellers to the four destinations: Preferred holiday experiences

glaciers/icebergs	76%	44%	51%	20%
stunning scenery (e.g. mountains, fjords, cliffs)	72%	75%	67%	68%
natural phenomena (e.g. northern lights, midnight sun)	70%	67%	69%	38%
wildlife (e.g. Whales, birds)	60%	45%	48%	48%
traditional villages	55%	52%	63%	47%
volcanoes/hot springs/geysers	47%	73%	38%	19%
new and unexpected experiences	44%	31%	40%	33%
contemporary culture/lifestyle	34%	34%	33%	50%
historic sights/events	27%	30%	20%	41%
capitals/cities	23%	33%	21%	62%

- The rankings are similar in the destinations, only Canada is somewhat special; the stunning scenery is important in all destinations.
- Greenland 'scores' highest regarding glaciers/icebergs and wildlife.
- Iceland 'scores' highest regarding volcanoes/hot springs/geysers.
- Lapland 'scores' highest regarding traditional villages.
- Canada 'scores' highest regarding lifestyle, historic sights and capitals/cities.

Q4: *When thinking about travelling to Greenland what would you like to see/experience?*
Basis: Potential travellers from France to Greenland (n=370), … to Iceland (n=1,333), … to Lapland/Northern Scandinavia (n=274), … to Canada (n=853)
Source: VG online survey 2017 by NIT/Ipsos

Potential travellers to the four destinations: Preferred holiday activities I

guided nature excursions	67%	62%	61%	56%
wildlife watching (e.g. whales, birds)	67%	55%	52%	45%
dog-sledding	64%	44%	67%	55%
photography	60%	49%	41%	45%
meeting and mingling with the locals	55%	50%	48%	57%
hiking	54%	52%	45%	42%
eating/drinking local specialities	51%	56%	47%	60%
learning about local handicraft	50%	51%	49%	49%
experience quietness	45%	45%	37%	32%
glacier hiking	44%	22%	24%	12%
guided cultural tours	34%	37%	30%	41%

- The rankings are similar in the destinations, only Canada is somewhat special; guided nature excursions are important in all destinations.
- Greenland ‘scores’ highest regarding nature excursions, wildlife watching, photography and glacier hiking.
- Iceland and Lapland do not stick out regarding any of the activities on this slide.
- Canada ‘scores’ highest regarding eating/drinking and cultural tours.

Q5: *Which of the following activities would you like to do when travelling to Greenland?*
Basis: Potential travellers from France to Greenland (n=370), … to Iceland (n=1,333), … to Lapland/Northern Scandinavia (n=274), … to Canada (n=853)
Source: VG online survey 2017 by NIT/Ipsos

Potential travellers to the four destinations: Preferred activities II

	Greenland	Iceland	Lapland/Northern Scandinavia	Canada
Swimming/wellness (e.g. in thermal baths)	29%	37%	20%	15%
Shopping for souvenirs	26%	27%	26%	32%
fishing	18%	9%	10%	10%
kayaking	18%	11%	9%	8%
skiing	13%	6%	10%	8%
cold-water swimming	13%	6%	6%	2%
cycling	11%	14%	6%	8%
horseback riding	6%	7%	5%	6%
trophy hunting	3%	1%	2%	1%
other	2%	1%	2%	3%

- » Regarding these 'secondary' activities, Greenland is sticking out regarding fishing, kayaking and cold-water swimming.
- » Iceland is sticking out regarding swimming and wellness.
- » Canada is sticking out regarding shopping for souvenirs.

Q5: *Which of the following activities would you like to do when travelling to Greenland?*
Basis: Potential travellers from France to Greenland (n=370), … to Iceland (n=1,333), … to Lapland/Northern Scandinavia (n=274), … to Canada (n=853)
Source: VG online survey 2017 by NIT/Ipsos

Potential travellers to the four destinations: Preferences about getting to the destinations

Plane: direct flight	74%	85%	74%	89%
Plane: round trip, multiple countries	18%	10%	15%	10%
Cruise: start/end in France	15%	10%	15%	4%
Cruise: start/end in Greenland/Iceland	14%	6%	7%	2%
Cruise: transatlantic	7%	3%	4%	2%
Car/bus/ferry	8%	6%	6%	1%
Total PLANE	*85%*	*90%*	*88%*	*92%*
Total CRUISE	*27%*	*18%*	*21%*	*14%*

- In all four destinations, most potential travellers prefer direct flights into the region.
- The figures are highest in the 'bigger' destinations, Iceland and Canada.
- Some potential travellers like to include the trip to the destination in a multi-country-air-trip. Here the figures are highest in the 'smaller' destinations, Greenland and Lapland.
- When thinking about cruising, especially a cruise in the region, Greenland 'scores' highest.

Q6: *How would you like to travel to Greenland?*
Basis: Potential travellers from France to Greenland (n=370), … to Iceland (n=1,333), … to Lapland/Northern Scandinavia (n=274), … to Canada (n=853)
Source: VG online survey 2017 by NIT/Ipsos

Potential travellers to the four destinations: Preferences about getting around and organisation

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At the destination				
Stay at one location	14%	20%	24%	19%
Stay at multiple locations	81%	75%	67%	76%
Excursions to one of the other countries	22%	12%	15%	5%
Organisation				
Package/tour operator	61%	53%	62%	49%
self	43%	51%	40%	50%

- In all four destinations, potential travellers prefer to stay at multiple locations within the country. This figure is highest for Greenland.
- The figures of potential travellers who would like to stay at one location is lowest for Greenland and highest for Lapland.
- Regarding excursions to other countries, we find the highest figures for Greenland and the lowest for Canada.
- Regarding organisation, the majority of potential travellers to Greenland and Lapland prefer package holidays.

Q6: *How would you like to travel to Greenland?*
Basis: Potential travellers from France to Greenland (n=370), … to Iceland (n=1,333), … to Lapland/Northern Scandinavia (n=274), … to Canada (n=853)
Source: VG online survey 2017 by NIT/Ipsos

Potential travellers to the four destinations: Preferred sources for inspiration & information

Guide book	69%	69%	63%	62%
Internet search engine	67%	72%	62%	62%
Destination websites (e.g. greenland.com)	58%	49%	39%	34%
Travel magazine	45%	35%	30%	28%
Travel agent	37%	32%	42%	34%
Holiday review sites (e.g. TripAdvisor)	31%	35%	28%	29%
Books/literature	25%	19%	14%	11%
Personal relations (friend, family, co-worker)	24%	27%	25%	42%
Online booking agent (e.g. Expedia, Booking.com)	18%	18%	20%	15%
Social media (e.g. Facebook, Instagram, Twitter)	17%	12%	12%	12%
Newspaper	7%	5%	4%	5%
Previous experience	6%	5%	8%	10%

- Regarding the preferred sources of information and inspiration, the ranking is very similar for the four destinations with guide books and internet search engines leading the ranking.
- Compared with the other destinations, Greenland 'scores' highest regarding destination websites, travel magazines, books and social media.
- Lapland 'scores' highest regarding travel agencies.
- Canada 'scores' highest regarding personal relations.

Q7: *When thinking about travelling to Greenland how would you like to look for inspiration/information for this trip?;*
Basis: Potential travellers from France to Greenland (n=370), … to Iceland (n=1,333), … to Lapland/Northern Scandinavia (n=274), … to Canada (n=853)
Source: VG online survey 2017 by NIT/Ipsos

Potential travellers to the four destinations: Preferred kind of online content

Pictures of the destination, its natural/cultural attractions	74%	73%	72%	67%
Pictures of accommodations/ activities/tours	62%	63%	62%	60%
Texts on how to get there/get around, where to stay, to eat & go shopping	58%	62%	53%	52%
Texts from other travellers with recommendations what to do there	54%	54%	43%	40%
Videos of nature/landscapes incl. natural phenomena	51%	45%	45%	36%
Texts with stories by locals about their daily life/culture	48%	34%	30%	27%
Contact options, where to find specific information/travel offers	46%	48%	41%	41%
Videos about local cultural traditions/lifestyle/art	39%	27%	26%	24%
Destination companies' newsletters	18%	11%	13%	11%
Social media posts/stories	16%	11%	11%	11%

- » Regarding the preferred online content of travel information, the ranking is very similar for the four destinations with pictures of the destination and of the tourism offer leading the ranking.
- » Compared with the other destinations, Greenland 'scores' highest regarding videos of the destination, texts by the locals, videos about the local lifestyle, newsletters and social media.
- » It seems, the need for information regarding Greenland is somewhat bigger than regarding the other three destinations.

Q8: *Which kind of content do you like to find when looking for online information about Greenland?;*
Basis: Potential travellers from France to Greenland (n=370), … to Iceland (n=1,333), … to Lapland/Northern Scandinavia (n=274), … to Canada (n=853)
Source: VG online survey 2017 by NIT/Ipsos

To learn 7:
Competitive situation for Greenland

NEW INSIGHTS FOR TOURISM

<u>Competition</u>:

- In France, potential travellers to Greenland are also interested in 4.8 other remote destinations in our question set.
- The fiercest competitors are Iceland and Canada. 77% resp. 70% of the potential Greenland travellers also want to go there. These are followed by Lapland and New Zealand. Looking further into the details, there is a high likelihood that the potential Greenland travellers end up in Iceland and Canada (and to a lesser extent in Lapland and New Zealand) before they actually travel to Greenland.

<u>Product requirements</u>:

- The rankings regarding the questions about product expectations are similar in the four destinations, only Canada is somewhat special.
- Regarding holiday experience, Greenland 'scores' highest regarding glaciers/icebergs and wildlife.
- Regarding preferred activities, Greenland 'scores' highest regarding nature excursions, wildlife watching, photography and glacier hiking. Regarding 'secondary' activities, Greenland is sticking out regarding fishing, kayaking and cold-water swimming.
- Regarding the technical aspects of travel, in all four destinations most potential travellers prefer direct flights into the region. In all four destinations, potential travellers prefer to stay at multiple locations within the country. This figure is highest for Greenland. Regarding excursions to other countries, we find the highest figures for Greenland and the lowest for Canada.
- Regarding the preferred information sources, Greenland 'scores' highest regarding destination websites, travel magazines, books and social media.
- Regarding the desired online content, Greenland 'scores' highest regarding videos of the destination, texts by the locals, videos about the local lifestyle, newsletters and social media.
- It seems, the need for information regarding Greenland is somewhat bigger than regarding the other three destinations.

- The results show that Greenland is in a fierce competition with other (remote) destinations around the world.
- The findings about characteristic product requirements and destination images again help to better understand the potential travellers to Greenland and to make the right decisions for market specific marketing approaches.

8. Main conclusions and discussion points

Photo by Mads Pihl - Visit Greenland

Main conclusions and discussion points

- **Huge potential in France**:
  Compared to the actual visitor numbers, Greenland has a huge volume of potential guest in France. This is where destination marketing comes in.
- **Expectations brilliantly confirm the BIG ARCTIC FIVE**:
  The analysis of the expected experiences and activities of potential guests in all three countries confirm the huge importance of Ice and Snow, Northern Lights, Whales, Dog Sledding and Pioneering People.
- **Opportunities in product development**:
  The French are much more into Dog Sledding and Meeting with the Locals than the other three markets. Even though „hospitable people“ is not a strength in the image of Greenland, the French are very open to get in touch with the locals and learn about their lifestyle.
- **Potential of combined Iceland-Greenland trips**:
  The French prefer direct flights into Greenland with different locations within the country. Combination trips or excursions to other destinations are only interesting for comparatively few. Also the cruise potential is lower in France than in the other markets.
- **Guide books and travel magazines are important in France and the other three markets**:
  Besides the work on the classical Visit Greenland channels (like website and social media) do not forget some of the traditional sources to spread the content. Look for cooperation possibilities with travel magazines (maybe not so much in advertising but more in PR/stories)
- **Of course there are also some barriers and general challenges on the four markets**:
  The fierce competition with other remote destinations 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 France fit well with what we have observed when analysing Germany, Great Britain and the USA. Nevertheless, all markets have their peculiarities and should be looked upon individually!

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ANNEX A:
Detailed tabulations about the Visit Greenland segments on the FRENCH market

VG Segmentation:
France (*interested in any of the remote destinations*)

INTEREST FOCUS

ENGAGEMENT LEVEL	Culture	Culture&Nature	Nature	Personal Challenge
Immersion	n=315 Ethnophile		n=60 Wilderness Seeker	n=80 Special Interest
Interaction	n=168 Culture Lover	n=923 Globetrotter	n=146 Nature Lover	
Observation	n=107 Culture Appreciator	n=895 Sightseer	n=290 Nature Appreciator	*n=159 no segment***

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

Q1a: *When you travel in general, is it the destination‘s nature or culture that you want to experience? Or is it something else that motivates you to travel?*
Q1b: *When you travel in general, how close do you want to engage with the destination‘s nature or culture? Do you stand back and observe? Do you totally immerse yourself by, for example, living in the home of a local? Or are you somewhat in between?*
Basis: All respondents in France interested to travel to any of the 10 remote destinations (n=3,143); Source: VG online survey 2017 by NIT/Ipsos

VG-Segments:
Preferred experiences in remote destinations

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	*Culture Lover*	*Culture Appreciator*	*Globetrotter*	*Sightseer*	*Wilderness Seeker*	*Nature Lover*	*Nature Appreciator*	
stunning scenery (e.g. mountains, fjords, cliffs)	62	63	55	**75**	**77**	56	62	**75**	68
natural phenomena (e.g. northern lights, midnight sun)	53	57	53	**62**	**62**	43	52	**61**	56
traditional villages	47	45	43	**56**	**55**	37	45	45	47
volcanoes/hot springs/geysers	43	51	44	**55**	**52**	37	42	42	45
wildlife (e.g. Whales, birds)	46	36	36	**53**	**52**	39	42	**53**	48
glaciers/icebergs	**47**	33	33	44	43	**48**	37	35	39
capitals/cities	32	**52**	**47**	40	41	26	27	30	35
contemporary culture/lifestyle	41	**44**	**43**	42	38	28	28	24	34
new and unexpected experiences	**40**	28	25	**43**	30	30	32	24	28
historic sights/events	29	**35**	**44**	33	**35**	18	23	26	28

Q4: *When thinking about travelling to this destination, what would you like to see/experience?*
Basis: All respondents in France interested to travel to any of the 10 remote destinations (n=3,143) in the segments; definitions: see page 73)
Source: VG online survey 2017 by NIT/Ipsos

VG-Segments: Preferred activities in remote destinations

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	*Culture Lover*	*Culture Appreciator*	*Globetrotter*	*Sightseer*	*Wilderness Seeker*	*Nature Lover*	*Nature Appreciator*	
guided nature excursions	52	45	48	**63**	**67**	44	58	62	49
eat/drink local specialities	54	**61**	53	**63**	54	39	42	47	52
wildlife watching	50	44	38	**59**	**55**	45	46	**55**	45
meeting with the locals	**58**	50	51	**62**	50	30	38	36	41
dog-sledding	44	35	49	52	**54**	34	50	**55**	46
learning about local handicraft	42	41	47	**56**	**55**	23	39	43	39
photography	49	42	35	50	**52**	39	39	45	**59**
hiking	**55**	38	33	51	48	**53**	48	50	36
experience quietness	33	33	43	40	**44**	26	32	**48**	34
guided cultural tours	36	**42**	**48**	**42**	**42**	10	23	24	24
shopping for souvenirs	20	24	**31**	29	**33**	9	24	26	25
swimming/wellness	25	**33**	24	**33**	28	15	19	22	22
glacier hiking	23	18	14	**26**	18	**25**	**25**	18	23
cycling	13	**16**	8	12	10	**17**	10	11	13
kayaking	**15**	12	5	**13**	8	**13**	9	9	10
fishing	12	7	8	11	9	13	**16**	10	**18**
skiing	**10**	5	5	**10**	6	**12**	8	6	7
horseback riding	**8**	6	5	**8**	5	**11**	**11**	5	5
cold-water swimming	**7**	6	4	**7**	3	**9**	5	5	6
trophy hunting	2	1	0	2	1	1	2	1	**4**

Q5: *Which of the following activities would you like to do when travelling to this destination?*
Basis: All respondents in France interested to travel to any of the 10 remote destinations (n=3,143) in the segments; definitions: see page 73)
Source: VG online survey 2017 by NIT/Ipsos

VG-Segments:
Preferred ways to travel to remote destinations

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	*Culture Lover*	*Culture Appreciator*	*Globetrotter*	*Sightseer*	*Wilderness Seeker*	*Nature Lover*	*Nature Appreciator*	
Plane: direct flight	78	**84**	**85**	**84**	**84**	75	80	82	73
Plane: round trip, multiple countries	**17**	12	14	14	11	**19**	10	7	16
Cruise: start/end in Continental Europe	8	10	5	**11**	**11**	7	**11**	**11**	7
Cruise: start/end in Greenland/Iceland	**9**	4	**9**	6	**7**	6	6	4	6
Cruise: transatlantic	**5**	2	1	3	**4**	2	2	**4**	7
Car/ferry	**7**	5	4	5	4	6	6	6	**8**
At the destination: Stay at one location	16	**27**	23	16	21	23	24	25	**28**
At the destination: Stay at multiple locations	73	70	73	**80**	**76**	69	67	70	68
excursions to one of the other countries	**13**	11	11	**14**	11	6	9	6	10
Organisation: Package/tour operator	37	44	56	52	**66**	46	48	**58**	48
Organisation: Self	**59**	**56**	48	54	40	37	46	41	52

Q6: How would you like to travel to this destination?
Basis: All respondents in France interested to travel to any of the 10 remote destinations (n=3,143) in the segments; definitions: see page 73)
Source: VG online survey 2017 by NIT/Ipsos

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

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	*Culture Lover*	*Culture Appreciator*	*Globetrotter*	*Sightseer*	*Wilderness Seeker*	*Nature Lover*	*Nature Appreciator*	
internet search engine	60	61	**69**	**70**	**70**	52	57	67	60
guide book	65	63	**75**	68	**72**	42	56	58	53
destination websites (e.g. greenland.com)	38	44	35	**52**	**47**	25	32	40	37
travel agent	22	24	33	33	**40**	28	27	**44**	29
travel magazine	32	29	**35**	**35**	**36**	21	32	24	28
holiday review websites (e.g. TripAdvisor)	22	**34**	31	**36**	33	12	20	32	30
personal relations (friend, family, co-worker)	**34**	32	30	**36**	29	20	25	24	**34**
online booking agent (e.g. Expedia, booking.com)	10	**19**	18	**22**	17	13	12	13	8
books/literature	**25**	17	**19**	**19**	14	9	17	12	**19**
social media	14	**16**	12	15	10	10	13	11	**22**
previous personal knowledge	12	9	4	7	5	**15**	7	5	**16**
newspaper	**7**	4	5	6	4	4	4	3	**8**

Q7: *When thinking about travelling to this destination, how would you like to look for inspiration/information for this trip?*
Basis: All respondents in France interested to travel to any of the 10 remote destinations (n=3,143) in the segments; definitions: see page 73)
Source: VG online survey 2017 by NIT/Ipsos

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

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	*Culture Lover*	*Culture Appreciator*	*Globetrotter*	*Sightseer*	*Wilderness Seeker*	*Nature Lover*	*Nature Appreciator*	
Pictures of the destination, its natural/cultural attractions	65	67	71	72	**77**	42	61	**73**	70
Pictures of accommodations/ activities/tours	50	61	62	63	**69**	33	42	**64**	53
Texts on how to get there/get around, where to stay, to eat & go shopping	48	56	**60**	**61**	**60**	41	46	54	51
Texts from other travellers with recommendations what do there	44	**52**	39	**53**	**52**	35	34	42	37
Contact options, where to find specific information/travel offers	38	44	**49**	**50**	48	26	35	38	41
Videos of nature/landscapes incl. natural phenomena	43	30	29	**46**	44	40	**46**	45	**47**
Texts with stories by locals about their daily life/culture	**34**	30	31	**40**	33	14	30	21	26
Videos about local cultural traditions/lifestyle/art	**30**	20	24	**33**	26	22	24	17	26
Destination companies' newsletters	10	**13**	9	**14**	**13**	1	6	8	11
Social media posts/stories	11	13	**14**	**14**	10	8	10	8	**17**

Q8: *Which kind of content do you like to find when looking for online information about this destination?*
Basis: All respondents in France interested to travel to any of the 10 remote destinations (n=3,143) in the segments; definitions: see page 73)
Source: VG online survey 2017 by NIT/Ipsos

VG-Segments:
Image of Greenland as a holiday destination

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	*Culture Lover*	*Culture Appreciator*	*Globetrotter*	*Sightseer*	*Wilderness Seeker*	*Nature Lover*	*Nature Appreciator*	
Destination with unspoiled nature	51	48	51	**55**	**55**	50	51	**52**	44
Destination with stunning scenery	49	46	46	**58**	52	39	48	47	**53**
Not too touristic	51	**53**	**59**	52	51	41	42	46	42
A place to experience special natural phenomena	40	48	**49**	**53**	**53**	25	34	45	45
A place to find quietness	40	**50**	43	**50**	46	30	42	**51**	47
Great opportunities for wildlife viewing	32	35	29	**39**	**38**	27	26	30	29
Experience the Arctic now, before the ice melts	31	31	34	**39**	**35**	18	33	30	**35**
Difficult to reach	27	37	**40**	**35**	33	23	26	33	**40**
Expensive destination	29	28	30	**35**	**36**	19	28	30	28
Great variety of snow activities	21	23	24	**30**	26	10	21	**27**	22
Changeable weather	19	22	21	**27**	**26**	6	19	21	25
Great opportunities for new and unexpected experiences	**29**	24	19	**31**	22	11	17	13	26
Unique, must-see destination	**25**	17	18	21	**22**	20	18	18	20
A place where you can feel free	21	13	20	**24**	18	**25**	23	21	**24**
A place to experience the traditional way of life	**20**	14	14	**20**	**17**	10	16	10	14
Hospitable people	**16**	11	10	14	11	**15**	14	10	13
Great opportunities for wellness	10	9	10	**14**	**11**	**11**	10	7	9
Only suitable for travel during the summer	8	**12**	6	9	**13**	3	5	9	8
Great variety of summer outdoor activities	**12**	4	5	**9**	6	4	5	7	6
Destination with interesting culture & history	**9**	5	5	**9**	6	**8**	4	4	**8**
Delicious local cuisine	**6**	3	3	**5**	4	3	4	4	**6**

Q3: *Please tell me which of these characteristics do you think particularly apply to Greenland?*
Basis: All respondents in France, aware of Greenland as a travel destination (n=3,519) in the segments; definitions: see page 73)
Source: VG online survey 2017 by NIT/Ipsos

VG-Segments:
Reasons against travelling to Greenland

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	*Culture Lover*	*Culture Appreciator*	*Globetrotter*	*Sightseer*	*Wilderness Seeker*	*Nature Lover*	*Nature Appreciator*	
too expensive	46	49	50	50	**53**	42	50	**53**	**53**
cold climate	28	**37**	**31**	30	**31**	25	**31**	27	22
bad weather	14	15	**17**	14	**19**	15	15	13	11
poor accessibility (air, sea connections)	16	**20**	15	14	16	**18**	14	13	15
whale hunting	12	7	11	12	12	**16**	**14**	9	**14**
doubts about adequate accommodation for me	9	9	8	10	9	**11**	4	7	**17**
low quality of tourism services	**6**	**5**	3	3	4	**6**	**5**	2	3
other destinations are more interesting	9	**18**	**19**	11	12	9	10	11	13
I would not know what to do there	3	**11**	**9**	6	5	**11**	8	6	5
I have not yet thought of going there	14	22	20	21	**27**	9	15	**24**	20
there are no reasons against going there	16	14	16	**18**	16	15	12	**20**	15

Q9: *What are in your opinion reasons against travelling to Greenland?*
Basis: All respondents in France interested to travel to any of the 10 remote destinations (n=3,143) in the segments; definitions: see page 73)
Source: VG online survey 2017 by NIT/Ipsos

VG-Segments:
Interest to travel to remote destinations

	Culture			Culture&Nature		Nature			Special Interest
	Ethnophile	*Culture Lover*	*Culture Appreciator*	*Globetrotter*	*Sightseer*	*Wilderness Seeker*	*Nature Lover*	*Nature Appreciator*	
Canada	65	66	64	**70**	**70**	66	63	**70**	**70**
New Zealand	54	**59**	51	**59**	49	48	45	46	**57**
Iceland	**57**	**61**	49	57	51	48	50	40	43
Lapland / Northern Scandinavia	**34**	31	21	**35**	31	28	26	27	24
Patagonia	**35**	22	20	32	24	25	**33**	24	19
Faroe Islands	**17**	13	11	**16**	14	13	13	13	**16**
Alaska	**18**	11	8	15	13	17	**20**	11	12
Greenland	**19**	6	9	14	10	**18**	14	9	11
Antarctica	**15**	10	4	**11**	8	9	8	6	7
Svalbard Islands	**9**	3	4	5	3	**11**	4	3	8

Q2: 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 France interested to travel to any of the 10 remote destinations (n=3,143) in the segments; definitions: see page 73)
Source: VG online survey 2017 by NIT/Ipsos

ANNEX B:
General travel trends on the FRENCH market

[Source: VisitBritain, France Market and Trend Profile, March 2015, extract of relevant parts of the report https://www.visitbritain.org/sites/default/files/vb-corporate/markets/france_mp_mar15_0_1.pdf]

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3. General Market Conditions

Key Insights

- France is home to 66 million, 200,000 or so of whom are British nationals, while there are more than 130,000 French born citizens living in Britain
- The French economy remains extremely sluggish with very high rates of unemployment
- The cost of sterling has fallen by about 15% over the past eight years for visitors from France
- France is home to around 472,000 High Net Worth Individuals
- France is a modern society with most citizens well-educated and enjoying a good standard of living
- Employees receive 25 days annual leave as standard, but the 35 hour week law means that those working in excess of this can take additional holiday, in some instances this can be as much as 40 days

3. General Market Conditions

Demographics

Around 66 million people live in France (Table 3.1), with this number increasing at an annual rate of 0.5%, predominantly, but not exclusively, as a result of natural increase, that is the number of births exceeding the number of deaths.

Table 3.1 Population dynamics

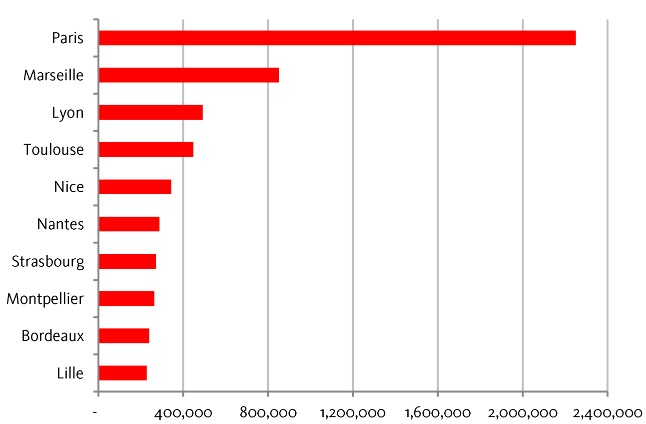
Measure	2014 estimate
Total population	66,259,000
Net No. migrants per 1,000 population	1.0
Overall growth rate per annum	0.5%

Major Conurbations

The French capital is by far the country's largest settlement, with nearly 2.2 million inhabitants (Chart 3.1), with Marseilles a clear second, ahead of a brace of cities that are home to roughly half a million citizens.

These figures relate to the city rather than wider administrative region population. World Bank estimates suggest that 79.1% of the population live in urban settlements.

Chart 3.1 Population of major cities

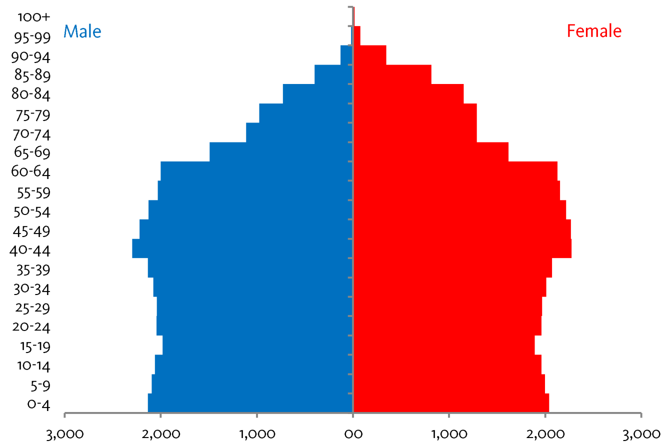


Population Structure

The population pyramid shown in Chart 3.2 is indicative of a population that is expanding at a slow pace, with very similar numbers of males and females through to age 59, above which there tends to be far more females than there are males.

The demographic structure for visitors to Britain from France is shown later in Chart 10.1.

Chart 3.2 Population structure (000s)



Links with the UK

According to the Office for National Statistics Annual Population Survey and Labour Force Survey in 2012 there were some 136,000 French born citizens living in the United Kingdom, with 61,000 of these in London, helping to explain why London has its own MP in French parliamentary elections (being part of the Northern Europe constituency) and its own French language digital radio station.

Although dating from 2006, estimates by the Institute for Public Policy Research indicated that at that time the number of British born citizens permanently resident in France stood at 200,000.

Figures from the Higher Education Statistics Agency reveal that in the 2012/13 academic year there were 11,722 French students studying at UK Higher Education institutions.

Politics

France is a Republic.

The next presidential election is due in May 2017 with the next legislative elections set for the following month.

Francoise Hollande was elected president in May 2012 on an anti-fiscal austerity campaign although the new president did not persuade Germany to shift away from strong measures to tackle the deficit problem. The popularity of Mr Hollande has fallen sharply during his first year in office, but with little headway made in the structural reforms analysts consider necessary if France is to have a competitive economy.

Economics

According to Oxford Economics 'there is little sign of meaningful economic recovery in France'. Although modest growth is on the cards for 2015 thanks to the recent dramatic decline in the price of oil there is little progress in tackling issues surround high public debt and low labour productivity. Ratings agencies have recently downgraded their credit rating for France.

Unemployment is a particular problem, firmly in double-digit territory now and reaching a record 3.5 million in November 2014.

Based on a measure known as 'purchasing power parity' GDP per capita (Table 3.2), the French have a high standard of living, at about $38,000 per capita. 'Purchasing power parity' is a means by which economic measures can be compared across countries having taken into account relative exchange rates and price levels.

For the latest economic indicators (updated quarterly) see Table 2.2.

Table 3.2 Economic indicators (% growth unless stated)

Indicator	2014	2015	2016
Real GDP	0.4	1.0	1.3
Consumers expenditure	0.4	1.1	1.5
GDP per capita (Int $)	36,538	37,582	38,773
Unemployment rate (%)	9.8	9.7	9.6
Average earnings	1.5	1.7	2.3
Consumer prices	0.6	0.9	1.3

Exchange Rate

Chart 3.3 Exchange rate trends (cost of sterling in local currency)

The French currency is the Euro. As can be seen from Chart 3.3 there has been a 15% reduction in how much sterling costs for visitors from France since the middle of 2007. The sharp fall in the value of sterling in 2008 has been somewhat eroded over the past two years with the prevailing rate now at around €1.25.

Trade Links

HM Revenue and Customs Overseas Trade statistics show that in 2013 France was the UK's fifth most valuable trading partner in terms of both exports and imports.

Figures from the Office for National Statistics show that in 2012 the book value of investment in the UK by French companies stood at £78.5bn while the book value of investment in France by British companies amounted to £54.4bn.

High Net Worth Individuals

Figures from the Capgemini World Wealth Report show that in 2013 there were 472,000 High Net Worth Individuals in France (those with investible assets excluding their primary residence worth more than $1 million), representing a 10% increase on 2012.

Separate figures from Credit Suisse indicate that in 2012 there were 21.8 million French adults with wealth in excess of $100,000.

Society

France is a modern society. Most people are well-educated and enjoy a good standard of living.

France is a country of ancient Catholic tradition, but where the weight of the church has declined considerably (State and religion are separated by law since 1905). Gay marriage was legalised in May 2013 leading to vocal protests from certain quarters of society

In 2012 the French population increased by 0.5% (332,000 people), with the birth per woman now standing at 2.01, the highest rate in Europe.

Language

French is the official language in France. Some regional languages exist and are still taught (Breton, Basque, Corse, Alsacien) but are not official ones.

French students learn English as the first foreign language at school (from the age of 6). Spanish, German and Italian are taught as the second foreign language as well as Russian, Portuguese and to a lesser degree, Chinese.

Younger French speak some English although the level of English is still quite poor.

Holidays and Annual Leave

French employees receive a standard 25 days annual leave.

However, the 35-hour-week law means that those who exceed this limit gain additional days off, known as RTT (Réduction du Temps de Travail), which can amount to 40 days holiday in total (depending on the company's policy).

France has 11 public holidays per year. Three of these are in May which results in numerous short breaks called "ponts". These are typically 3-5 days including the weekend, which are an opportunity for long-weekend-city-breaks.

According to a study by COE-Rexecode, a full time employee in France worked an average of 1,679 hours in 2010, one of the lowest averages in Europe.

Main school and university holidays

The main school and university holidays are the summer holidays when students enjoy two months off from late June to beginning of September. University students enjoy an even longer break until the beginning of October.

Toussaint holidays last two weeks (late October / early November), Christmas holidays last for two weeks, as well as the winter (February/March) and Easter holidays. France's regions are divided in 3 zones allowing winter and Easter holidays to be spread over several weeks.

Consumer Trends

Previously considered a "marketing target", the consumer has taken a different status over the years. Informed, demanding, decoding the speech, not hesitating to use all technological means at its disposal to make its voice heard … he inverted the relationship and leads the game. All this appeared in a new context, with new concerns: ethical, related to the economy or other.

As a result of the economic crisis, environmental and ethical concerns, the consumer is reviewing its fundamental priorities in order to adapt to new constraints surrounding him. (source: www.e-marketing.fr)

Consumption in 2012/13: the crisis has had more impact than in 2009

The crisis and its aftershocks affect the Frenchs' morale. 63% of them say they are worried about their income, according to the latest study by CCM Benchmark "Consumption 2012" (1). This is ten points higher than in 2009. The threat on employment also follows the same upward trend (+12 Poins vs 2009). All socio-professional categories say they are affected by the crisis.

For the first half of 2013, consumption is at its historic lowest in France. Fiscal pressure and an increased cost of living have resulted in a drop in spending power (-0.9% in 2012).

According to a survey from CSA Cofidis, consumers decrease their spending to face increasing prices, when they cannot use their savings (1 in 2 French). They will decrease spending in 1) leisure, 2) clothes, 3) household equipment and 4) food.

Quality of life threatened

Beyond the concerns expressed by consumers, the crisis has a more profound impact on the perception of quality of life. Improving the quality of life is no longer obvious: half of consumers feel they do not have a greater well-being than their parents at the same age.

The young 'relativise' their situation

If the population under 35 years do not hide their concerns for employment and income, indications show however that this segment of the population is more optimistic. Young people seem to relativize more the effects of crises (but do they know anything else?), a third of them even going so far as to consider that they are exaggerated (against 20% for the overall population). 15% expect a quick return to growth (against 9% for all).

Strategies to adapt

Overall, the desire to consume better products (bio, ethics, etc) which had risen sharply in 2009, is now relatively stable. "Smart purchase" continues to grow. The study reveals that the under 35 willingly defer their expectations in terms of quality and buy more private label products. 54% of them claim to be willing to change brands to encourage products from France or Europe.

Source: www.e-marketing.fr

Adjusted Consumption ("La consommation ajustée")

According to l'Observatoire international by Ipsos, recent studies have shown the emergence of "Adjusted consumption".

This is a new twist in the way French consume. The uncertain environment (which limits their level of certainty) combined with advances in technology (that broaden their scope) encourages the development of thoughtful, pragmatic and balanced consumption, more adjusted to the "real" needs.

According to a recent study by Ipsos, 6 out of 10 French feel the need to reduce consumption in order to improve the quality of life, (although they don't want to deprive). Preference is now clearly for best quality rather than quantity.

Collaborative consumption and sharing economy

The economic and societal crises, coupled with the emergence of communities through social networks, have boosted collaborative consumption. People tend to exchange and share more and more (flats, cars, clothes, advise, travel ideas etc…)

Source: www.e-marketing.fr

Web and retail: inseparable to look for the best deals

Consumers now try to identify offers and compare prices a store's website before visiting the physical shop.

Although their priorities have changed the French are not ready to sacrifice everything. They still consume a lot but always try to look for the best value offer.

E-commerce

According to the French Federation of e-commerce (Fevad), the online business has continued to grow in the first quarter of 2013, with a 14% growth in turnover, although the average spend per buyer fell to a low record. The amount of Internet sales reached €12.1bn, a 14% increase.

This growth was driven by the increase in the number of transactions (20%) and online shoppers (5%), especially among the 65 + (27%). At the same time, the number of commercial sites also continues to grow (18%). With nearly 19,000 new websites created over the past year, France now has 120,000 active e-commerce sites. At the end of 2012, France had 31.7 million online shoppers, and 117,500 active e-commerce sites. Sales amounted 45 billion euros in 2012.

According to a study by FEVAD and Médiamétrie, 32 million people buy online. Over one year, the number of people purchasing goods and services online has increased by 5% (+1.4 million e-shoppers).

The Top 3 websites are: Amazon (14.6 million unique visitors per month); C Discount (10.4 million); Fanc (10.2 million).

Out of the products sold on the internet in France, Tourism comes first, and concerns 56% of the online purchases in the second half of 2012.(Baromètre Fevad Médiamétrie//NetRatings 2012).

Today, there are 117 500 e-commerce websites in France (+17% on a year ago). Total e-commerce turnover for 2012 in France should reach €45bn (+19%) according to FEVAD.

E-tourism websites are not growing as fast since quarter 2, 2012 but performed a 7% increase in a very difficult context for most TOs.

According to 2013 estimates by FEVAD, 1 out 5 will purchase on line mainly using a computer despite the growth in the use of smartphones and tablets. They will continue to seek for best value offers.

CtoC

An estimated 7 out of 10 internet users are buyers or seller. 89% of them consider the Internet as the 2nd most efficient way of purchasing and selling to other consumers.

Around 80% of the Internet buyers/sellers do so at least twice a year, 32% sell at least once a month and 28% buy at least once a month. (Source: Baromètre du CtoC PriceMinister - La Poste)

M-tourisme

M-commerce is growing fast with a total turnover that has reached an estimated €1bn in 2012 (400 million euros in 2011) ie 2% of e-commerce total turnover.

One web user out of five purchase goods with a smartphone or a tablet and 22% prepare their e-shopping online (compare prices, search for products, offers and information).

An estimated 14% of e-shoppers have already used their mobile phones to buy online which represents more than 4.3 million French (Médiamétrie, mai 2012)

Preparing holidays with a mobile phone

Around 12% of the French who went on holidays in 2011 have already used their mobile phone to prepare a holiday. Out of the Internet users equipped with a smart phone, 35% of them used it to prepare their holidays (+74% compared to 2010). (Raffour 2012).

Travel Trends

- Approximately 29.6 million French took a holiday in 2011, 2.2 million less than in 2010. The departure rate is down 5% to 56% (61% in 2010) according to the annual study by Opodo-Raffour
- Long stays (more than 4 nights) have slightly decreased (departure rate of 53%, 2.7 million people) 5% less than in 2010. Short-breaks have increased with a departure rate of 30%, (+2.1 million compared to 2010).
- 67% of the French who travelled abroad booked through travel agencies. However, among 21 new behaviours adopted by the French when purchasing holidays "booking directly more and more" is quoted in the third position in 2012. For Guy Raffour, agencies must adapt and modernize.
- With the economic crisis, the French have adopted new behaviours in terms of travelling. As per table below,
- 66% of the French who went on a holiday in 2011 compared products a lot more
- 56% of them booked more on the Internet
- 53% booked more products directly (without intermediary)
- 52% reduced their spent during the holiday

- 52% went on more on holiday in France rather than abroad.

Source: Etude Raffour 2012

Destinations

According to Raffour Interactif:

- 65% of the French holiday only in France
- 20% only abroad
- 15% in France and abroad

Booking

Overall, for their merchants holidays (with a paid accommodation) 56% of the French have reserved directly from suppliers and 53% with intermediate. (The total exceeds 100 because people take more than a holiday per year).

More tourists but less spending

If 2009 was a terrible year for tourism, 2010 saw a return to growth. According to L'Echo Touristique, CETO's members (association or tour-operators), which account for 80% of the market, registered a 5.6% increase between 1st of November 2009 and 31st of October 2010 compared to the previous year.

However, this growth is mainly due to people buying flights only rather than packages. More French have been on holidays but they have reduced their spending.

Online tourism and search of the best deal

According to CCM Benchmark, online tourism in 2010 accounted for €8bn (excluding business tourism), up 19% compared to 2009. E-tourism represents 46.1% of B to C e-commerce in France.

The Internet is considered to be an ideal means to find 'tailor-made' holidays at the best price, especially for the wealthy French (who have a higher propensity to have access to the Internet compared to the French population generally). Looking for the best deal remains their first motivation.

Shorter holidays but more of them

The French reduce the length of their holidays but travel more often throughout the year. There is an increase in the short-stays/weekend breaks that are mainly booked online.

Themed travel

The French are looking for 'themed' holidays and they tend to mix a 'one week in a seaside resort' holiday with a 'one week trekking' holiday.

Memorial Tourism

The rather new concept of memorial tourism should find a new impetus in 2014. As examples, Le Salon Mondial du Tourisme (the leading annual consumer tourism show in France) dedicated areas to memorial tourism in its 2012 edition, for the first time and Atout France conducted a study on it.

France is about to commemorate the centenary of the First World War. 2014, will also celebrate the 70th anniversary of the Normandy landings.

In 2010, the revenue generated by commercial sites related to memorial tourism was estimated at €45m.

Last-minute and very last minute booking

The French continue booking at the last minute. In general, 17% of bookings are made less than two weeks before departure and 80% of these last minute bookings have been made online.

According to a recent survey about travel trends conducted by Travelzoo (1st quarter of 2013), over 50% of its subscribers in France intended to go on at least one long trip (more than 6 nights) in the next five months.

According to the survey, 73% of the French have not yet booked their summer holidays. Stéphane Renard, editor of Travelzoo France, said: "This year, the trend is even more than ever 'very last minute'. Travelers expect very good opportunities, are looking for bargains to book online or through travel agencies. "The French subscribers plan to spend, in total, between 200 and 299 euros per person for each short-stay and up to twice this amount for a stay of more than 6 nights.

An estimated 62% of consumers say that a good offer could encourage them to go on a trip, price is an important factor, sometimes even more than the destination.

Creative tourism

Music, dance, cooking ... More and more travellers want to experience local culture by participating in creative activities.

"Experiencing" rather than "seeing."

Participating in workshops, cooking, painting classes or attending art/crafts courses is growing in popularity. Travelling with professional photographers or participating in a music creation course are other examples. "Creative tourism" is a form of participatory tourism. More and more travellers want to experience the local culture by participating in a creative activity. They want to live a unique experience," says Caroline Couret from Creative Tourism Network.

The crisis is accelerating changes in consumption

The Second International Conference on Creative Tourism held in Paris helped think about this phenomenon. The search for human contact, the demand for authenticity, valuing traditions are trends that influence tourism, including creative tourism.

Budgets constraints and participatory Tourism

Budget remains the main criteria when the French chose a holiday destination according to Raffour Interactif.

Participatory tourism is also slowly developing in France, due to a need for more authentic holidays with a reduced budget. As an example, GroupnGo France now offers holiday packages on a community platmform: the higher the number of registered travelers , the more prices fall. With this community platform, the traveler can create a group, select the dates of travel, and then invite their network ... or join an existing group.

Extended Toussaint Holidays

Mondial Assistance has presented the results of the fifth wave of the barometer conducted by Ifop "The French and their holidays". It appears that the transition from 10 to 14 vacation days for Toussaint is viewed positively by the majority of French (65%). In contrast, the strong adhesion of the opinion is not accompanied by an increase in holiday travel.

26% of French people say that the extension of the Toussaint holidays encourages them to go on holiday during this period. But in reality, only 19% have a project to go on holidays, against 22% last October. The impact on length of stay is almost nonexistent since 49% of the French plan to go on holidays for one week and only 16% for more than a week. In a context of high uncertainty regarding the buying power, last minute reservations seduce nearly four in ten French (39%).

Successes of summer 2012

Owner to owner:

The boom in rentals from owner to owner is undeniable. There has been a sharp increase in reservation requests in summer 2012, +32% for the industry leader Abritel (HomeAway), which is host to 80,000 ads in France.

Now, private sales websites also offer travel offers. The best known of them, leboncoin.fr, registers more than 100,000 rental offers in France. Customers have a wide choice, ranging from a simple apartment to a luxury villa, or a sailboat.

Home stays and home exchanges:

Travellers are increasingly fond of good deals unearthed on the Internet for to find cheap accommodation for their holidays. His is illustrated by the success of the website dedicated to homestays, airbnb.com, which has passed the milestone of 10 million nights since its creation in 2008. Exchanging homes is also more and more popular, the website echangedemaison.com now has 5,000 active ads, including 3,000 in France. Just this summer, there were 2,000 exchanges, for a weekend, a week, or longer.

4. Motivation and Attitudes to Holidays

Key Insights

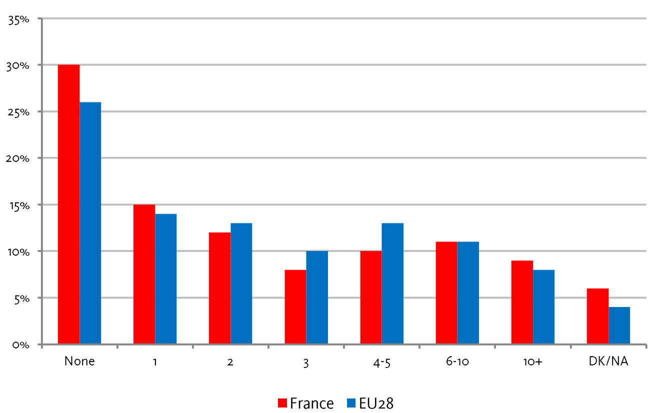
- 30% of those in France took no overnight trips away from home in 2013
- Keeping fit and healthy and spending time with family and friends are important life priorities
- The types of holiday taken most frequently are those for 'sun/beach' and to visit friends or relatives
- Almost half say that the 'natural features' of a destination can entice a repeat visit

4. Motivation and Attitudes to Holidays

The Importance of Holidays

According to a European Commission survey on the attitudes of Europeans towards tourism (Chart 4.1) 30% of those in France took no overnight trips away from home during 2013, rather higher than the EU average of 26%. However, 44% of those in France made three or more overnight trips away from home, indicating that travel is a key ingredient in many French lives.

Chart 4.1 Number of overnight trips away from home in 2013 (%)



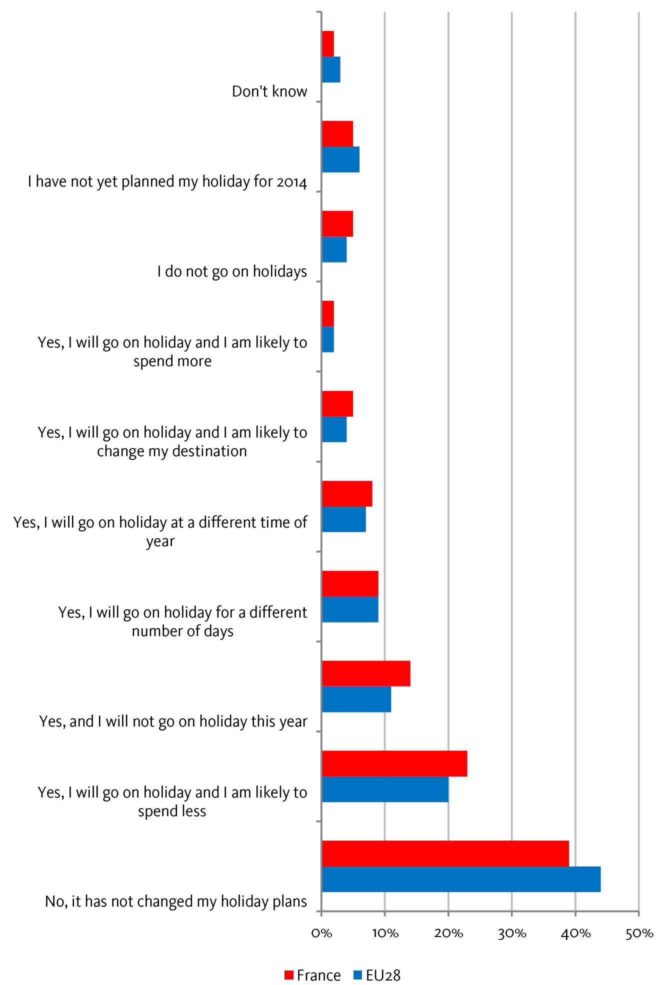
The survey quizzed respondents about the extent to which the economic situation has had an impact on their holiday plans for 2014. Chart 4.2 tells us that 39% of those in France say that the economic situation has not led them to change their holiday plans.

The most common changes in holiday behaviour likely in 2014 was to say that although holidays would still be taken, less would be spent on them.

Research undertaken on behalf of VisitBritain by Arkenford in early 2013 explored a number of topics including the degree to which international travellers felt different factors were important to them, on a scale that ran from 1 = 'not at all important' to 7 = 'extremely important'.

Chart 4.3 summarises the results and shows that among the life priorities of greatest importance to those in France were 'Keeping fit and healthy'. 'Making the most of leisure time' and 'Spending time with family and friends'. For the French taking holidays, either abroad or in France, was slightly less of a priority than for the 'average' study participant.

Chart 4.2 Impact of the economic situation on 2014 holiday plans



Attitudes to Travel and Destinations

Another question asked in the 2013 multi-country study explored attitudes towards travel and holidays by asking respondents to say to what extent they agreed with a barrage of statements. The scale ran from 1 = 'totally disagree' through to 7 = 'totally agree', with the results for those in France being shown in Chart 4.4.

The statement agreed with most strongly was that visiting new countries broadens understanding of different cultures, yet as we will see in Chapter 7 most holidays taken by the French are in France.

Those in France were less likely than average to say that they took pleasure from the journey to a holiday destination as well as being at the destination itself, but they also agreed less strongly than average that they had been put off going on holiday by airport security – although this may reflect the ease with which the French can travel by car or train to neighbouring countries.

Chart 4.3 Life priorities

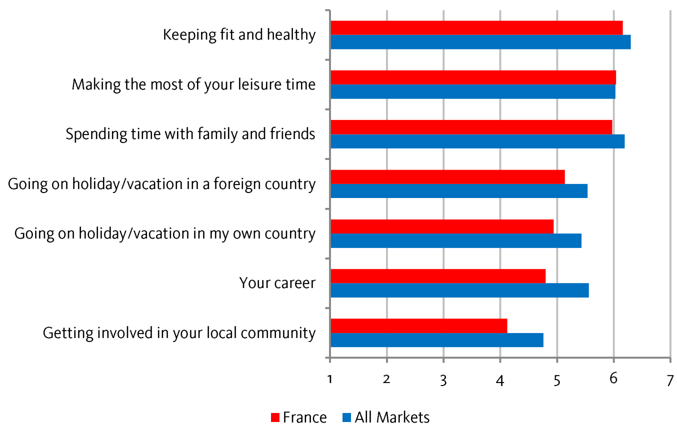
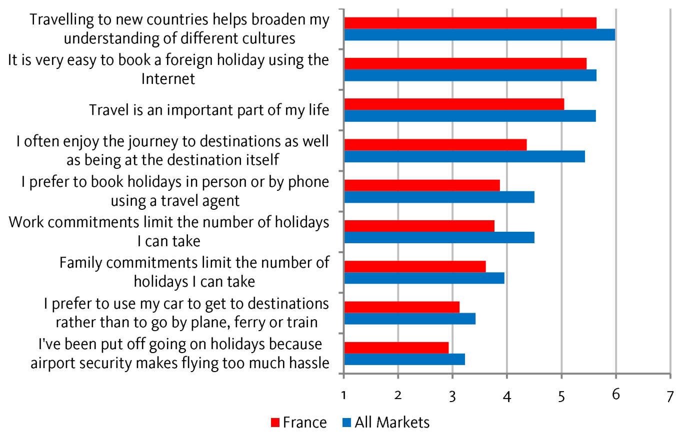


Chart 4.4 Attitudes towards holidays



A survey conducted by the European Commission in early 2014 invited respondents to name up to three 'main reasons' for having gone on holiday during 2013. The results (Chart 4.5) reveal that visiting family or friends was cited as a main reason for taking a holiday by 45% in France, ahead of 'sun/beach' on 42%. Perhaps suggesting a taste for being pampered 21% mentioned 'Wellness / Spa / health treatment'.

Another questions included in the 2013 VisitBritain study asked about the types of holiday that had been taken in the past three years and Chart 4.6 reveals that the types of trip taken most frequently are visits to friends and relatives and beach holidays, which tallies closely with the separate EC survey (Chart 4.5).

The types of trips that the French were least likely to have taken in the past three years were cruises, those to watch or play sport, mainly to see a concert or theatre show and those for 'self-development'.

Chart 4.5 Main reasons for going on holiday (%)

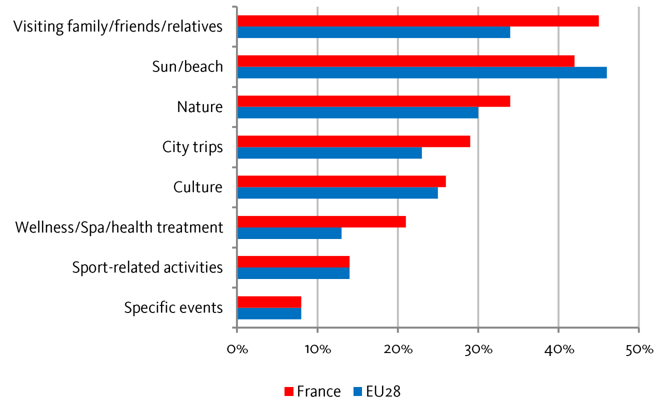


Chart 4.6 Types of holiday taken in past three years

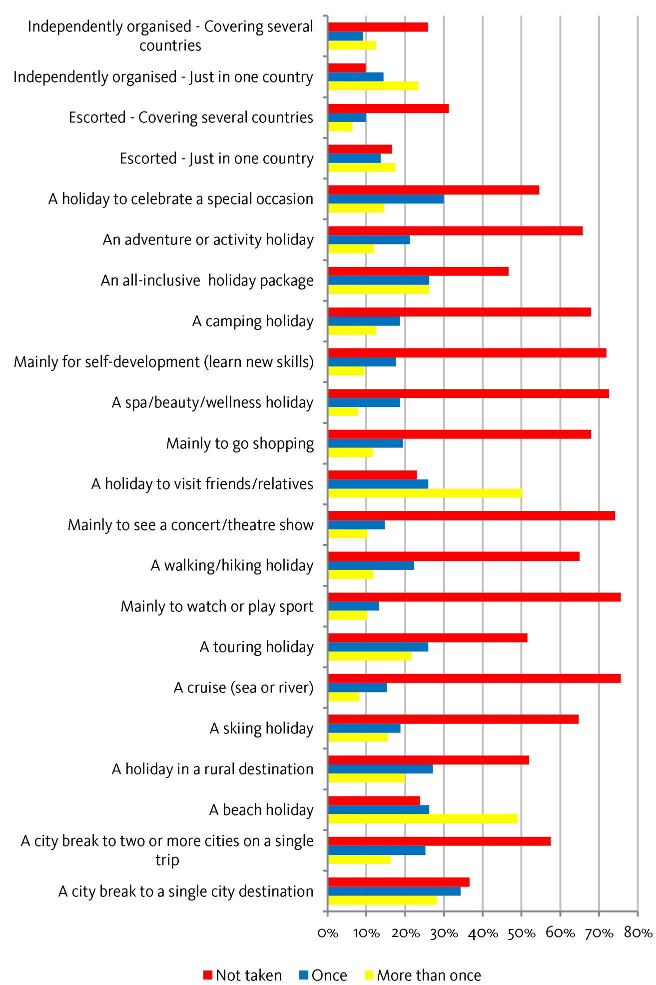
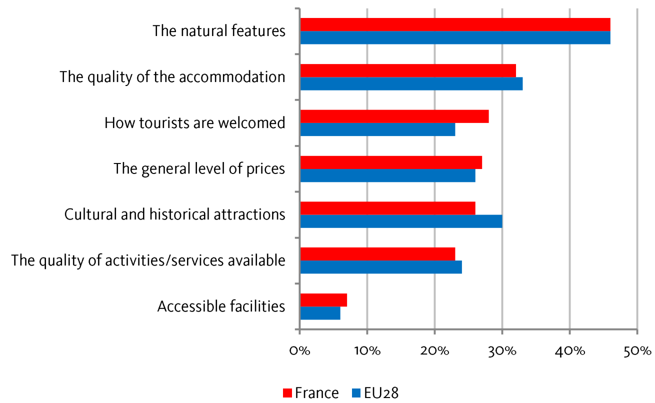


Chart 4.7 Reasons to return to the same destination for a holiday



Returning to the European Commission Survey participants were asked 'Which of the following would make you go back to the same place for a holiday?' with respondents able to name up to three reasons. Chart 4.7 demonstrates that almost half of those in France opted for 'The natural features' as a reason to return somewhere, quite a way ahead of the other options.

5. Reaching Consumers

Key Insights

- Up to one-third of Google searches carried out on a smartphone are travel related
- More than 18 million smartphones were sold in France in 2014, up 13% on the year before
- Four-in-five Internet users visit social networking sites with Facebook by far the most popular, with almost four-in-ten having an account
- 58% of those who had taken a holiday lasting four or more nights in 2013 said that they had used the Internet to arrange at least part of their trip
- The majority of trips to Britain are booked directly with the carrier and on the Internet
- Television programmes about travel, advocacy and personal experience are all major sources of influence on destination choice

5. Reaching Consumers

Media Landscape

According to Media in Life 2012 study (Mediametrie), French people have had an average of 42.5 media and multimedia contacts per day (+4% compared to 2010 and +10% compared to 2008) in 2012. 98.4% of the population use traditional media (TV, radio, print, cinema) while 3 out of 4 use digital media. 6 French people out of 10 surf the web daily (+10% compared to 2010) while three-in-ofour access at least 3 medias a day and one-third at least 4 medias (radio, TV, print, internet or cinema). French people use their mobile more and more with an average of 4 contacts a day. They mostly use it to text and go on the internet but less so to actually phone.

The economic down turn have affected or will affect most French media. Both L'Express and TF1 groups but also France Television and many other major media groups like Le Figaro and Prisma Meida are going through redundancy plans.

According to a survey from OJIM, French people consider that French media are not independent (95%). They are influenced by their owners (88%) and the brands who advertise (81%). Freedom of speech is considered to be no longer guaranteed in France (85%).

Journalists are considered as being far from the realities (89%) and lack ideological plurality which doesn't help them to remain independent (60%).

Internet is considered as the most independent media (94%) that guarantees freedom of speech (75%). The answer to the media crisis in France, content should be improved (13%) and journalists should be more pluralists (82%).

Broadcast Media - Television

Television is by far the favourite media in France: 80% of the French population aged 15 + watch TV for an average of 4h06 per day. An estimated 58.9 million French people (out of a total population of 65.3 millions) are equipped with a TV set. 17.5 millions have access to satellite TV, 24.7 million have access to web TV (37.1 % of households) and 5.9 million have access to cable TV. With 14% of households equipped with smart TV, catch up TV is now very popular: 8 million people aged 15 + have used it (+33%). For live broadcast, 1/10 of the audience now turns to alternative screens like tablets, smartphone or computers.

Despite the proliferation of cable, satellite and TNT channels in the past years, the television landscape remains pretty much unchanged with 7 traditional TV channels leading (68.8% audience share) and themed channels with developing audience (31.2% total audience share). With an enriched offer, each person watches an average of 6 different channels per day.

The free TNT channels (introduced stage by stage in France from October 2009 to November 2011) and the 6 new channels launched at the end of 2012 have given French population a wide choice of programmes (22% audience share).

In terms of leadership, TF1 private TV remains the main channel with 23.7% audience share. France 2 (belonging to France Televisions public group) comes next with 14.9% audience share. The 2011 major change was confirmed in 2012 with M6 private channel (10.8%) surpassing France 3 national TV (9.7%). These remain the four main channels in France. France 5 and TMC come next with 3.5% and 3.6 % audience share followed by W9 (M6 group) with 3.2% and Canal Plus (Paid for TV) with 2.9% audience share. Direct 8, a new comer in the TNT landscape, managed to get 2.3 % audience share in the 1st year.

Catch-up, PPV and VOD TV usage is increasing dramatically more specifically for movies (70%), adult programmes (16%) and TV series (9%). Documentaries account for only 1% of VOD usage.

In terms of program popularity, sports, cinema and TV series (over 10 million viewers for The Mentalist and 9 million for Dct House, Cold Case and Castle) are the most watched. French people are great fans of sports programmes and more specifically major international competitions (Euro Final – 13 million viewers, Olympic Games Men 100 Metres – 9.3 million viewers, Olympic Games Opening Ceremony – 8.7 million viewers). Talk shows and documentaries (where Britain can be covered) are also popular with an increasing audience share.

Source: Mediametrie – www.mediametrie.fr / Insee

Radio

Radio is the 2nd most important media in France. With 82.2% audience share, 43 million French people (aged 13+) have listened to radio at least once a day in 2012 for an average of 2 hours 56 minutes per day, mainly between 8.00 and 8.15 AM (13.6 million listeners). On weekdays 51% listen to radio at home, 28,4% in their car and 17% in the office.

On the 126,000 existing radio stations in France, RTL remains the number one radio with 11.5%, followed by France Inter public radio (11%), France Info public news radio (9%), Europe 1 (8,7%) and RMC (7.9%). The number one music radio is NRJ (11.7% audience share) followed by Skyrock (7.8%). Source: Mediametrie – www.mediametrie.fr

Print Media: Newspapers

With the competition of new technologies (internet, ipad…), the economic downturn and the decrease in advertising revenue (-7.5% in 2012), print medias in France are suffering. Most studies are not optimistic about the future of print though not all publications are suffering equally mostly depending on their digital strategy. Nevertheless, print remains a media of reference in France.

In 2012, France accounted for 845 publications (-3.8% versus 2011), which represented 3,963,731,759 copies.

Each month, 97% (49.8 million) of French population read at least one print media (+0.7%). They are 68.5% (34.9 millions) to read a print media every day. 42.8% (21.9 millions) read at least 1 daily newspaper, 52.2% (26.7 millions) read at least one magazine. This means that every day, 26.5% (13.5 millions) read at least a magazine and a newspaper. Each French person read at least 7 different magazines, women (7.6) read more than men and surprisingly web users (7.3) read more print media than the average population. On an average, each French person reads 1.5 daily newspaper and 5.5 periodicals.

Multi-reading is confirmed as a new trend which allows print media to make the most of the web. 42% of French aged 15 + read their newspapers online (21.5 million people). 18.2 million read their newspapers on a computer (+1.3%), 8.3 million read them on a smartphone or a tablet (+21.7%). 52% read their newspaper both online and printed.

Most French daily, weekly newspapers and magazines have adapted to the internet. They have developed their on-line version (some are starting to charge) and have launched an on-line news agent facility, ePresse.fr, where readers can purchase a PDF version of their favourite newspapers/magazines. 42% of the French population (21,5 millions) read their newspaper online, 18,2 million use their computer, 8,3 million use a mobile phone or a tablet but 52% of those who read their newspaper online also read the print version.

Source: One/Audipresse - France Pub

Daily and weekly newspapers

OJD circulation figures are stable for 2012 with a total of 1.4 million copies sold, mainly because of French general elections and the Olympics. Le Figaro remains the number one daily (399,588 copies). Le Monde comes next with a drop in sales (-1.59%). Despite an Olympic and football year, sales for L'Equipe (daily sport newspaper) have also dropped by 3.73%. Aujourd'hui en France and Les Echos are performing well with sales increasing by 5.5 % and 2.6%. Figures for Liberation are stable (119 418 copies, +0.18%). "La Tribune" financial daily ceased on 30 January 2012 with partly explains the good results of its competitor, Les Echos.

In 2012, most national dailies and weeklies have developed paying I-Pad/I-Phone applications, Le Figaro daily newspaper being the first one to launch its application, mid-2011.

Since the autumn of 2012, daily and weekly newspapers have developed more and more "bonus" magazines, which are mainly weekly or monthly supplements getting extra revenues from luxury brands that are less impacted by the economic downturn. Le Figaro was the first one to launch the trend in 1978! Examples of existing supplements: "Série Limitée" and "Les Echos Week-End" for "Les Echos", "L'Express Styles" for "L'Express", "Obsession" for Le Nouvel Observateur "Aujourd'hui/Le Parisien Magazine" for "Aujourd'hui en France/Le Parisien", "Next" for "Liberation", "M Le Magazine" for Le Monde.

Free daily newspapers are no longer considered as a threat and are equally suffering from the economic crisis.

Main national daily newspapers: Le Figaro (399,588) - L'Equipe (394,724) - Le Monde (366,356) – Aujourd'hui en France (285,771) - Libération (160,799) – Les Echos (152,054). "L'Opinion" is a new daily newspaper launched in May 2013, with 50,000 copies per day, 5 days a week.

Main national weekly newspapers: Le Nouvel Observateur (642,978) - L'Express (615,336) Le Figaro Magazine (538,479) - Le Point (500,314) - Marianne (346,461) – M Le Magazine du Monde (310,112).

Free daily newspaper: 20 Minutes (948,585) - Direct Matin (932,740) - Métronews (767,000).

Source: OJD – www.ojd.com / Tarif Média - www.tarifmedia.com

Print Media: Magazines

Each month, 48.7 million French (96.2 % of total population aged 15+) read at least one magazine. There are a very large number of publications in France ranging from women's magazines to special interest publications, for a total of 394 publication in 2012 (-4,4% vs 2011) and 1 686 913 310 copies. TV and women magazine are those performing the most alongside news magazines. 2012 has been a rather depressing year for magazines in France in terms of sales and advertising revenues, the first half of 2013 has not been any better despite the launch of 2 new women magazine.

In this context, women's magazines are performing rather well despite a drop in circulation of -3,4% vs 2011 (360 954 167 copies) but the competition is fierce with 2 new women magazine launched: Vanity Fair France (100,000 copies) on 26 June 13 and Stylist (free magazine from Marie Claire group – 400,000 copies) in May 13.

There are 25 lifestyle, home design and garden magazines in France that have recorded a 6,2% drop in distribution in 2012. Despite a poor year, this sector is still very popular in France. "Maison Créative" (-

5.1%) lost its leadership, which profited to "Détente Jardin" (-2,55% and 436,142 copies). Next come "Art & Décoration" and "Rustica Hebdo" (-1,25% and -1,94%). In the 5th place is "Maison & Travaux" (+2,29%).

People magazine have been particularly affected with a -7.1% drop in sales and -8,3% in circulation in 2012. TV magazines registered significant drops as well (-6% for Télé Poche, -3.5% for TV Grandes Chaines, -5.5% for Télé Z).

As a new trend, numerous mooks (publications that are half way between a magazine and a book) have appeared over the last two years which are mainly sold in bookstores rather than newsagents at quite a high price (between €5 and €15 per issue). Editorial content (provided by professional journalists or writers) is more developed and stories illustrated with lot of photos. Unfortunately, the economic model has not proved profitable (no advertising revenue) and their circulation and readership remains small except for Revue XXI, the oldest and most successful quarterly mook (average 50,000 copies sold per issue).

Source: OJD – Telerama.fr

On-line Media

2012 and the start of 2013 have been marked by fast growing use of tablets and smart phones with + 28% of smartphone users in 2012 versus 2011 and a number of tablet users multiplied by 2,4 over that same period (5,5 million tablet users). Newspapers, magazines, TVs, all media turned to digital technologies, developing the "multi-reading" trend. They are still looking for a business model, with a clear tendency to charge at least part of the content (paywall), increase the quality of online content, innovate in terms of advertising formats and develop paying I-pad/Smart Phone apps.

Pure Players like Mediapart, Slate, LePost, Huffington Post France or Rue 89 rely on advertising and content syndication. Their union (Syndicat de la Presse Indépendante d'Information en Ligne) is still trying to get the sector a legal status in France and a similar VAT rate as print media (2.1% versus 19.7%).

Use of Communications Technology

Mobile/Tablets

An estimated 24,1 million people (44,4% of French population) aged 11 + in France use a smartphone and 77,7% access the web through their mobile on a daily basis. 7,3 million download mobile apps on a monthly basis. 48% are women, 27.4% are aged 35-49 (+13%), 23,5% live in Paris and surrounding area. 92.1% have accessed at least one website and 46.9% have accessed an application. In December 2012, smartphone users have connected to an average 32 web site and 5.8 apps (out of 3548 existing apps). Top 3 applications (March 13): Google (9.765 million users), You Tube (9.161 m) and iTunes (8.495 m).

18,4% of French households are now equipped with a least 1 tablet (+132% over 1 year).

Source: Mediametrie/NetRatings – One/Audipress –NetMobile Marketing Association France/comScore

Internet

According to Insee, 78% of the French population aged 15+ (54% in 2007) have access to internet at home (96% for people aged 15 to 29). 6,7 million people do not have access to internet, mostly aged 65+ (64,2%). 97% of web users have a broad band connection. 79,7% of web users connect to internet every day.

In 2012, 80% of the French population (ie. 48 million people) are regular web users (male: 51% - female: 49%), most are aged 12-55 (31,4 million) and educated. They use internet mainly to get the news (49%) and purchase good on line (49%), to watch or download films and music, to watch TV (21%), to play online games or to look for a job (21%). 74% connect at home, 32% connect at work and 40% on a mobile device.

98% of French population see Internet as an easy access source of information, 83% consider internet as a reliable source of information, 95% thinks it helps them in their daily life, 86% admit they could not live without.

Source: Insee – Credoc – comScore – IFOP/Enjeux

Broadband

Virtually all home Internet users in France enjoy broadband access according to Médiamétrie//NetRatings. The number of broadband accesses (ADSL, cable, optic fibre) in France has reached 23.6 million at the end of quarter 3, 2012. It has increased by 1.3 million since the start of 2012 (+6% for quarter 3). xDSL (21.7 millions) represent 95% of broadband accesses, 6 out of 10 (11.7 millions) are linked with TV access. Source: www.arcep.fr

Social Media

85% of French web users declare they belong to at least 1 social network (77% in 2011). As a new trend, mobile devices have become essential to social media. Each of web users is connected to an average of 3.5 social networks out of the 55 networks available in France and 2 out of 3 visit them at least once a day. They use them to stay in touch with their friends and relatives (92%), to entertain themselves (77%), to share photos and videos (74%), to stay updated with news (54%). Very few use them to meet new people (24%) or for professional purposes (12%). Facebook is by far the most visited with more than 1 out of 2 web users registered (34,2 million unique visitors) followed by Skyrock (8,5), Twitter and Google+ (5,6). Linkedin (4,3), Viadeo (3,6), Trombi (3,5), Tumblr (2,58) and Copain d'Avant (2,5).

Twitter's desktop audience has grown significantly, reaching 7 million French internet users (5% of all web users) in April 2013, making France the 7th largest and one of the key markets for Twitter. The number of tweets has increased by 350% in 2012 vs. 2011. 61% of Twitter users are aged 15-35, 55% are male, 33% live in Paris area.

Source: Mediametrie/Net-Ratings – IFOP/Observatoire des Réseaux Sociaux - Credoc - comScore

Digital Media

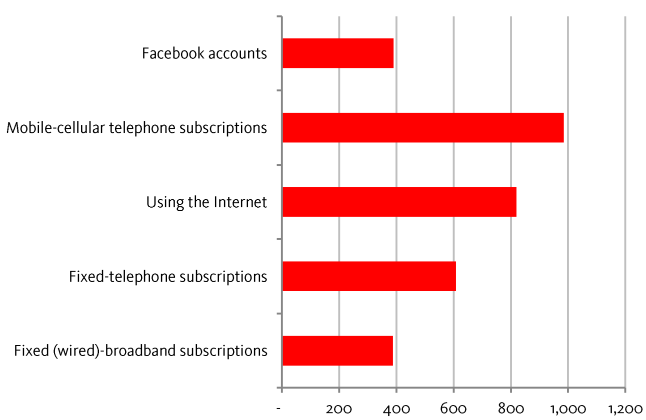
According to Médiamétrie/Net-Ratings, Youtube is the leading video platforms in France with 28.4 million users and 1.7 billion videos viewed. Dailymotion comes next with 14.1 million users, then TF1/WAT with 8.8 million users and Facebook with 4,3 million users. France Television gathers 4.2 million users.

Access to communications technology

An estimated 18 million smartphones were sold in France in 2014, up 15% on the year before and France now has around 30 million mobile users. The number of tablets purchased in 2014 stood at 6.9 million.

Looking at access to communications technology in 2013 (Chart 5.1) it is evident that mobile ownership is universal in France, while the number with Internet access stands at very nearly 820 per 1,000 of population. In contrast with many emerging economies 'land lines' remain important, with 608 per 1,000. Very nearly four-in-ten in France have a Facebook account.

Chart 5.1 Communications technology per 000 of population

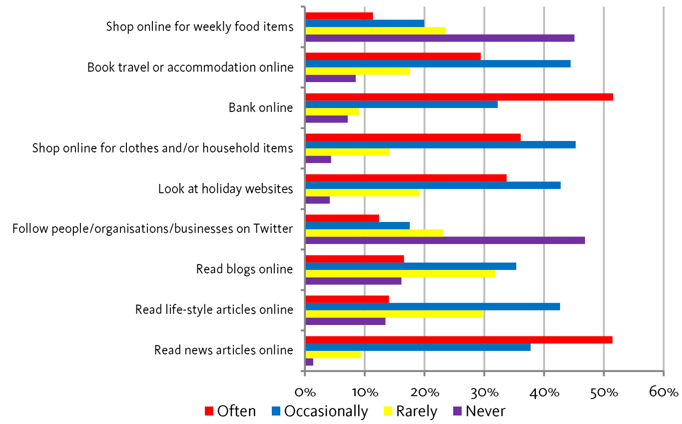


Online activities

A multi-country study among international travellers conducted by Arkenford on behalf of VisitBritain in the spring of 2013 covered a number of topics including a look at what activities are done online.

As is clear from Chart 5.2 the activities those in France were most likely to say they did 'Often' were 'bank online' and 'read news articles online', whereas almost half said that they 'Never' shopped online for their weekly food items or followed people or businesses on Twitter.

Chart 5.2 Activities done online



When it comes to looking at holiday websites this is an activity that 34% said they did 'Often' and a further 43% 'Occasionally', with a similar result for booking travel or accommodation online, 29% saying this was something done 'Often' and 44% 'Occasionally'.

Sources of Holiday Inspiration

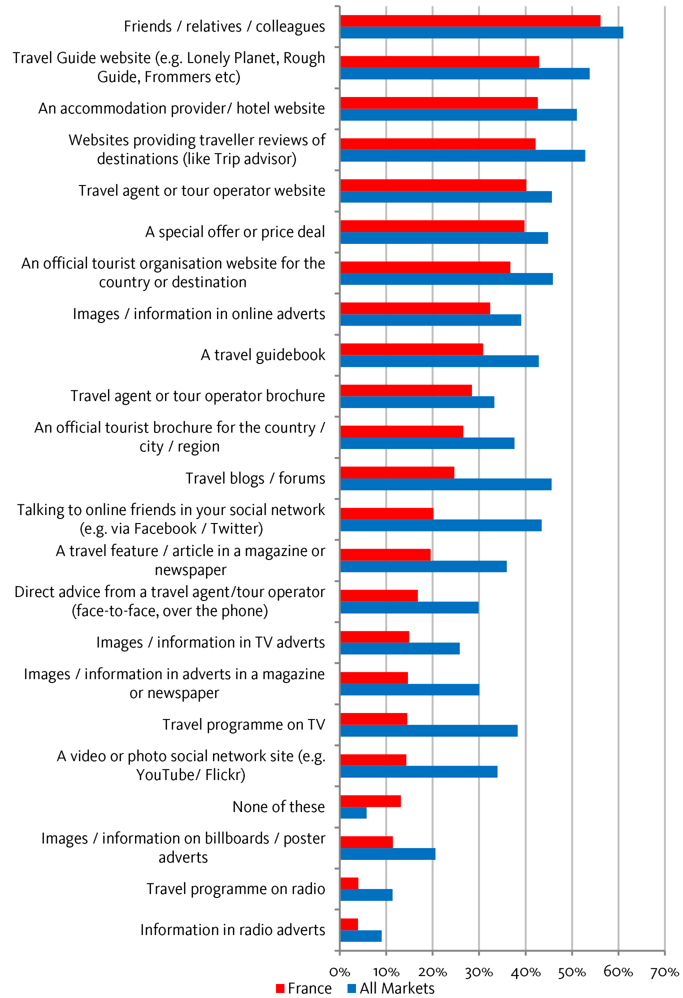
The same study asked about the information sources that had influenced any holidays or short-breaks taken in the past year (Chart 5.3).

More than half (56%) said that family or friends had been an influential source of information, which was in line with norm across all study countries. However the French were less likely than average to cite each of the sources asked about with this especially true for 'travel blogs/forums', 'Facebook/Twitter', 'Travel programmes on TV' and 'Video/photo social network sites'.

Accommodation provider websites, Travel Guide websites and traveller review websites were regularly mentioned as influential sources of information suggesting that the French are comfortable with using online sources but that social media is not currently as important as more mainstream online sources.

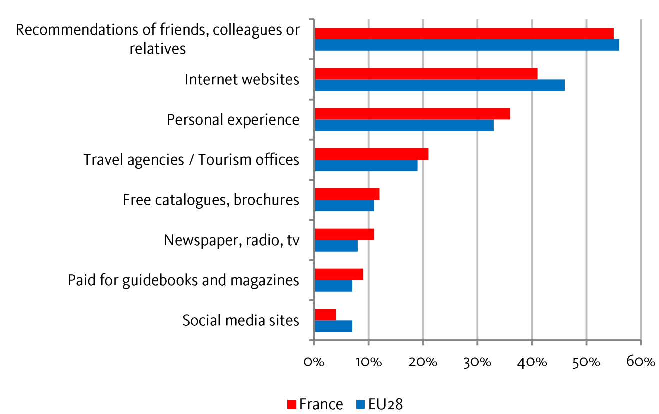
Two-in-five had made use of a tour operator or travel agency website with a similar proportion citing 'A special offer' which chimes with the findings in Chapter 4 relating to the fact that the French are adapting to the current financial situation by reducing how much they spend on holidays.

Chart 5.3 Influences on destination choice



Planning and Booking

Chart 5.4 Most important source of information



The 2014 European Commission Survey exploring the attitudes of Europeans towards tourism asked 'From the following information sources, which one do you consider to be the most important when you make a decision about your travel plans?' with respondents able to nominate up to three sources.

The results (Chart 5.4) show that more than half (55%) considered recommendations of friends and relatives to be among the most important sources with 'Internet websites' in second place on 41%.

It is worth noting that one-in-five nominated 'travel agencies' as a source that they felt was important with about half this volume mentioning free catalogues/brochures.

Booking Methods

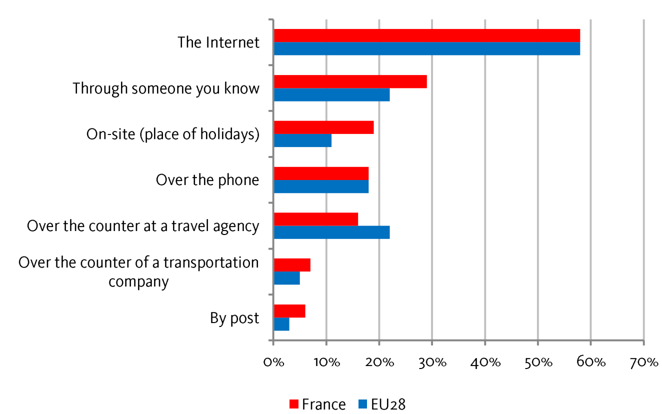
The same survey also asked those that had taken at least one holiday lasting four or more nights during 2013 'Did you arrange your holidays in 2013 using any of the following methods?', with respondents able to mention as many methods as were relevant from the pre-defined list.

From Chart 5.5 it can be noted that those in France were most likely to have used the Internet (58% doing so) in line with typical EU country.

A VisitBritain question included on the 2012 International Passenger Survey asked departing visitors about how their trip to Britain and any paid accommodation that they may have stayed in during their stay had been booked.

It can be observed from Chart 5.6 that regardless of journey purpose the bulk of trips were booked 'On the Internet' and 'Directly with carrier'. Those trips that are booked through a travel agent are virtually as likely to be booked 'Face to face' as 'On the Internet' suggesting that 'bricks and mortar' travel agents may still have a role to play in France.

Chart 5.5 Booking methods (% used in 2013)



12. Caring for the Consumer

Key Insights

- The French are keen to have information provided in their own language when in Britain
- The French have below average perceptions of British food
- When on holiday the French will always compare the quality of food and drink with that which would be available in France
- Should a visitor from France make a complaint, deal with it promptly and courteously – professionalism is very much valued

12. Caring for the Consumer

Language

As part of the 2007 GMI Anholt Nations Brand Index Survey VisitBritain sponsored a question that asked respondents to consider a raft of different statements and say whether or not they agreed or disagreed with them.

One of these statements was 'Information for visitors to Britain should be available in languages other than English', and on a scale of 1 = 'Totally disagree' to 7 = 'Totally agree' the average rating from respondents in France was 5.45, markedly higher than the 4.99 figure when looking at all respondents combined.

Table 12.1 Language basics

English	French
Please	S'il vous plait
Thank you	Merci
Yes	Oui
No	Non
Sorry! (apology)	Désolé(e)/ Veuillez m'excuser
Excuse me!	Excusez-moi/Pardon
Sorry, I do not speak French	Excusez-moi mais je ne parle pas Français

Table 12.2 Language tips for arrival and departure

English	French
Hello	Bonjour
My name is...	Je m'appelle...
Welcome to Britain	Bienvenu (e/s/es) en Grande-Bretagne!
Pleased to meet you!	Enchanté(e)
How are you?	Comment allez vous?
Enjoy your visit!	Bon séjour! / Bonne visite!
Goodbye	Au revoir
Did you enjoy your visit?	Avez-vous apprécié votre séjour?
Have a safe journey home!	Bon retour/Bon voyage!
Hope to see you again soon!	A bientôt!

The French always appreciate documentation and brochures in French.

Caring for French visitors

Expectation levels for standards and service are high – any issues should be resolved promptly.

Local information and colour – pubs, heritage (castles), gardens and shopping are appreciated.

Accommodation

Likes and Dislikes

The French prefer to stay in mid-range accommodation including bed and breakfasts, with en-suite facilities. Country house hotels are popular in France (Relais et Chateaux), and a good benchmark for the value for money levels expected.

Youth travellers prefer to opt for youth hostels or university accommodation, again because price is an issue.

A designated smoking area in public places is appreciated.

Food and Drink

Perceptions of British food are below average, although there is a keenness to try eat a full English breakfast.

Meal Times

On week days, French go to lunch between 12pm and 2pm.

Dinner is usually served from 8pm.

Likes and Dislikes

Food is one of the great passions of the French people. French cooking is highly refined and involves careful preparation, attention to detail, and the use of fresh ingredients. It varies by region and is heavily influenced by locally grown produce.

Although they like to change their habits during their holidays (even when it comes to food), there are some areas where the French will not make concessions. Food and drink quality will always be compared with France.

The three main meals are le petit-déjeuner (breakfast), le déjeuner (lunch), and le dîner (dinner). Although the midday meal is still the main meal in rural areas, there is a tendency for families to eat the largest meal in the evening.

Breakfast is a light meal of bread, cereal, yogurt, and coffee or hot chocolate. Lunch and dinner generally involve several courses, at minimum a first course (entrée) and a main dish (le plat), followed by cheese and/or dessert. They like to spend time over their meals.

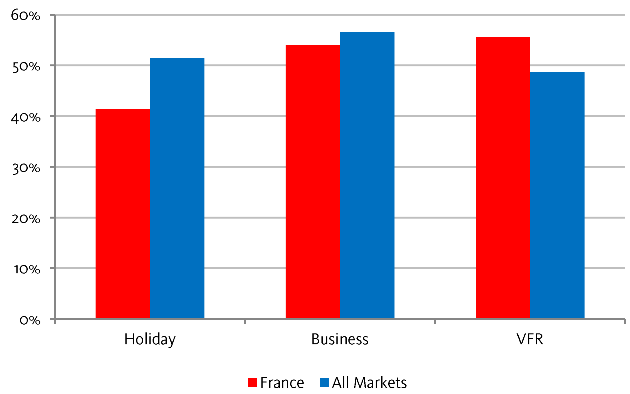
The French will only begin eating after everyone's food has been served and after someone says 'bon appétit'. In France it is polite to finish everything on their plate and be warned a nearly full wine glass could indicate they don't want anymore.

Paying Bills

It can be seen from Chart 12.1 that those on Holiday in Britain from France are a little less likely than average to make payments for goods and services by means of a credit card, with 41% doing so. Both Business (54%) and VFR (56%) visitors are a little more likely to pay with plastic.

The French are more likely to pay with a credit card when travelling abroad. Leaving a tip is not customary in France, but sometimes if the service and food have been good, they would leave just a few coins to round up the sum.

Chart 12.1 Propensity to use a credit card



13. The Leisure & Travel Trade

Key Insights

- The trade structure is quite complex and fragmented
- Tour operators are mainly based in Paris
- In meetings expect the French to be very direct, to ask a lot of questions and raise issues they would like to solve
- Agendas are rarely used and will not necessarily be adhered to

13. The Leisure & Travel Trade

Trade Structure

Overview of Trade Structure

The Trade Structure is quite complex and fragmented and it is important to understand who the various players are and how they interact with each other.

The travel trade structure is made of tour operators and travel agencies (online and offline). Associations and Comités d'Entreprises* also play an important role.

*Comités d'Entreprises (CE) are "social clubs". Every company with 50 or more employees must give at least 0.2% of turnover to the CE, which then organizes staff trips or proposes trips to employees at discounted rates.

Types of Travel Operators

- Tour operators: create products. They sell them through their own network or independent travel agencies. Increasingly, they also sell directly to the consumer through their websites
- Travel agencies: usually sell products produced by tour or coach operators. Some travel agencies, however, also have a group department that organises holidays for associations
- Coach operators: usually sell their products (coach tours) through their own network or independent travel agencies

French Tour Operators

'Généralistes' are top national tour operators who produce one or more large brochures (for example Nouvelles Frontières, Thomas Cook). Britain as a destination is included in these. However, a separate brochure on Britain is produced in some cases (such as Gaeland Ashling). These packages are sold through their own network of travel agencies, as well as through independent travel agencies.

Clientele: mostly individuals although the larger operators will have a groups department.

'Spécialistes' are smaller operators who specialise in specific destinations or in specific activities. (for example Comptoirs de Pays Celtes). Most carriers, whether air or sea, have their own tours. They sell directly as well as through some independent and networked travel agencies.

Clientele: mostly individuals.

"Groupistes" can encompass big or small operators are specialised in groups (students, companies other) although most of the "spécialistes" and "Généralistes" have a groups department.

Clientele: groups

Coach operators: there are about 2,500 coach operators in France, 1,500 of which are members of the Fédération Nationale des Transports de Voyageurs, FNTV (which SNET has fused with). SNET is the Syndicat National des Entreprises de Tourisme). Coach travel in France accounts for 10.5% of European travel.

Clientele: groups (à la carte or with pre-determined date departures).

Associations sell to their own club members or defined market segments (comités d'entreprise, school groups, groups with a cultural interest).

Clientele: groups only.

Agency Networks sell their own products as well as others eg Thomas Cook, Carlson Wagonlit, Selectour, Fram Voyages.

Clientele: mostly individuals.

Based on figures from Echo Touristique, October 2012, Table 13.1 shows the top tour operators selling Britain in 2011

Table 13.1: Top tour operators selling Britain in 2011

Tour Operator	Number of clients
Verdié Voyages:	38,300
Brittany Ferries	21,892
Transeurope	7,050
Boomerang	4,808
Vacances Transat (Scotland only)	3,412

French Travel Agencies

Their primary aim is to sell transport and also packages set up by tour operators. In 2012, there were circa 3,900 agencies in France registered with Atout France (SNAV, Syndicat National des Agences de Voyages). Some 1,400 of licensed agencies are members of SNAV with nearly 28% of the agencies concentrated in the Paris area. Bookings are made by the client themselves direct with the accommodation provider and carrier.

Hypermarkets sell through dedicated Internet sites and/or call centres. Some examples include: Leclerc Voyages (travel agent with 180 outlets); Voyages Carrefour: (travel agent with 98 outlets); Auchan Voyages: 14 outlets. The tendency has been for them to offer time restrictive but very attractively priced offers to supermarket clientele. Clientele: mostly individuals.

Agency Networks sell their own products as well as others eg Thomas Cook, Carlson Wagonlit, Selectour, Fram Voyages. Clientele: mostly individuals.

Independent travel agencies sell products produced by tour operators or coach operators. Clientele: mostly individuals.

Online travel agencies: The top 5 agencies overall (Médiamétrie/Net Ratings, 2012):

- Voyages-sncf.com
- VoyagePrivé
- Opodo
- Lastminute.com
- Promovacances

The three big European travel sites, Go Voyages, Opodo and eDreams announced their merger in 2011.

- Numerous online travel agencies exist that cater for British breaks:
- •www.karavel.com – part of the same group as promovacances.com
- •www.expedia.fr
- •govoyages.com
- www.Ebookers.fr

Changes in the distribution structure:

Distribution in the tourism industry is going through a lot of changes and is one of the key issues travel trade are facing. The economic situation being difficult, more and more companies are willing to change the way they work to cut down commissions.

A few examples:

- More and more travel agencies act as tour operators: they produce their own products and contract directly with hotels on territory.
- More and more inbound agencies contract directly with travel agencies (without the intervention of a tour operator),
- More and more tourism companies want to integrate all the steps of building and selling a trip: from producing their own products to distributing them to the final consumer.

Online agencies have also revolutionized the tourism industry by offering discounted deals both to their final consumers or to travel agencies (by buying a lot of stock, contracting directly with hotels, offering commissions on sales made online).

Planning Cycle

Brochure publication schedules are as follows:

- November-December: preparation of the spring/summer brochures
- May/June: preparation of autumn/winter brochures
- May- September – Summer brochures are on the street and start is made on planning winter brochures
- October – December: winter brochures on the street

Trade Exhibitions

IFTM – Top Résa, Paris

IFTM-Top Resa is France’s main travel trade show. It takes place every year around the 20th of September (for 4 days).

Travel agents, tour operators, airline companies, hotels, travel agencies, receptive agencies, foreign tourist boards and other tourism businesses gather for the annual event. This event encourages travel trade to meet and develop business together.

Various conferences are given by major research and statistics companies throughout the show, with specific themes linked with tourism news (for example consumption trends)

The 2012 edition welcomed 28,788 trade people over 4 days; an increase of 3.7% compared to 2011.

The show’s organisers try to innovate every year; 2012 saw the implementation of a “speed dating session “ between tour operators and travel agenst. It took place at the “Tour Operator village”: main tour operators were exhibiting at the same place within the exhibition centre, thus creating synergies.

In 2013, Reed Exhibitions, in charge of the show has already said that they would like to focus on business tourism and events. They also want to brainstorm with distribution networks, tour operators and tourist boards about creating offers and content more adapted to todays’ travel agencies’ needs.

There are a number of other trade exhibitions in France although IFTM Top Resa is the biggest. For example, MAP Pro (more targeted towards coach operators, Paris), Ditex (targeting travel agents, Avignon) and ILTM (Luxury market Place, Cannes).

Doing Business

Where to find the trade

French tour operators are mainly based in Paris, with a few exceptions based in big cities (for example Toulouse, Lyon, Nice).

Time difference

France is GMT +1 (when it is 12:00 noon in the UK, it is 1pm in France).

Day Light Savings Time is the same as in the UK.

Climate

France has a varied climate because of its position in the far west of the European continent that combines climatic influences of the Atlantic, the Mediterranean.

The southeast of France boasts a Mediterranean climate; the south west enjoys nice weather with a bit of rain. The North of France including Paris has a continental climate.

Transport

There is an excellent road and train network all over France. Big cities usually suffer from traffic jams, especially at peak hours. Drivers have to pay a fee to park their car in the cities and this is relatively expensive.

When coming into Paris/Lyon/Marseille, we advise to take public transport (metro, RER, train, bus).

There is also a large float of taxis in all cities.

Public Holidays

Table 13.2 National Public holidays in 2015

Date	Holiday
1 January	New Year's Day
6 April	Easter Monday
1 May	Labour Day
8 May	VE Day
14 May	Ascension Day
25 May	Whit Monday
14 July	Bastille Day
15 August	Assumption Day
1 November	All Saints Day
11 November	Armistice Day
25 December	Christmas Day

Business Hours

Business hours for travel trade are usually from Monday to Saturday:

- For tour operators: from 09:00 to 19:00
- For travel agencies: from 10:00 to 19:00 in the Paris region, and from 9:00 to 12:30 and from 14:00 to 19:00 in other regions

Meetings

Timing

July and August are quiet months for travel agents. The contacts you wish to see may well be on holiday!

Avoid the summer months and the Christmas holiday period. September is always a very busy time of the year called "la rentrée" when people come back from holidays, and prepare activities. This is also the month when IFTM Top Resa takes place and it will be difficult to secure appointments the week before and during the week of the event.

Tour operators prepare their spring/summer brochures in November/December and their autumn/winter brochures in May/June.

Arrive on time for meetings. A few minutes before the time is accepted but do not arrive late.

If you expect to be delayed for a meeting, telephone immediately and offer an explanation.

Transport

Allow plenty of time between appointments, especially in Paris and Ile de France. Remember to ask for the nearest Metro station – this will help you to locate the address more easily and avoid traffic jams. Transport in Paris, including the underground system, is very good and easy to use.

You can get a daily pass but make sure you buy one that covers the zones you are planning to visit. Taxis are available, but it is best to book beforehand (average cost for a ride in the centre of Paris is €20, much higher if you go out to the suburbs).

From Roissy airport, you can use the Roissybus, which will drop you behind the Opera, or the RER –suburban express to Auber – both in the heart of Paris. Opera is historically known for being an area where tourism businesses tend to be based, although quite a few have now moved to the suburbs.

Business Meeting Etiquette

Appointments are necessary and should be made in advance, one or two weeks before, and reconfirm again the day before. Never turn up without an appointment. Be punctual and be flexible – allow plenty of time between appointments for traffic and talking.

Business dress is understated and stylish. Men should wear dark coloured, conservative business suits for the initial meeting. How you dress later is largely dependent upon the personality of the company with which you are conducting business.

Greetings

The handshake is a common form of greeting and friends greet each other by lightly kissing on the cheeks, once on the left cheek and once on the right cheek. Be careful of using first names as they are usually reserved for family and close friends. You should wait until invited before using someone's first name.

If your meeting is in French, please make sure you address people as “vous” not “tu” on the first appointment. “Tu” is quite familiar and reserved for friends. It can also be used in business occasions once you know your interlocutors. You will usually be invited to address them as “tu”, it shouldn’t be of your own initiative.

Meetings

Meetings are important to the French. They like to meet the people they work with to build a relationship, a network. First meetings are important for introductions.

Further meetings will be to maintain relationships but also discuss business opportunities and make decisions. Expect the French to be very direct, ask a lot of questions and raise issues that they’d like to solve.

Agendas are very rarely used and will not necessarily be adhered to.

Relationships

French business behaviour emphasises courtesy and a degree of formality. Mutual trust and respect is required to get things done and trust is earned through proper behaviour. Creating a wide network of close personal business alliances is very important.

In business, the French often appear extremely direct because they are not afraid of asking probing questions. The French will carefully analyse every detail of a proposal. Business is hierarchical. Decisions are generally made at the top of the company.

Business is conducted slowly. You will have to be patient and not appear ruffled by the strict adherence to protocol.

The French are often impressed with good debating skills that demonstrate an intellectual grasp of the situation and all the ramifications. Never attempt to be overly friendly. The French generally compartmentalize their business and personal lives. Discussions may be heated and intense.

High-pressure sales tactics should be avoided. The French are more receptive to a low-key, logical presentation that explains the advantages of a proposal in full.

When an agreement is reached, the French may insist it be formalized in an extremely comprehensive, precisely worded contract. Written communication is formal. Secretaries often schedule meetings and may be used to relay information from your French business colleagues.

Language

The French don’t speak English! If you know some French, speak some - it will always be appreciated. If possible, it is better to conduct the meeting in French. However, English is more and more spoken: it will not be a problem for product managers but travel agents will struggle a bit more.

Having French language brochures/information is a must if you want to build French business. Brochures only in English will reduce your chance of success. In the worst case, have a French cover letter or introduction.

Communication

Face-to-face contact is preferred to written or telephone communication and the way you present yourself is of critical importance when dealing with French. They like to have honest and open discussions and they value professionalism, knowledge of the products, the market and the tourism industry. Small talk is not so important and shouldn’t take too long.

It is best to display modesty when describing your achievements and accomplishments. Communication tends to be formal and follows rules of protocol. If speaking in French, please refer to your contact as “vous”.

Decision-making is held at the top of the company, since France is a hierarchical country. The French like to debate and they might challenge what you are saying, only to find out more about your products. This is sign of interest.

First you must reach an oral understanding. A formal contract will be drawn up at a later date. French expect both sides to strictly adhere to the terms of a contract.

Maintaining relationships and regular and clear communication throughout the duration of the contract is essential.

Hospitality Etiquette

- Credit cards are usually accepted in all restaurants (only double check with the small ones) VISA and Mastercard are most accepted but in some restaurants American Express cards are not accepted
- Arrive on time and if possible, before the invite

- If you order water you will be asked if you want mineral still or sparkling or tap water. It is very common to order tap water and will not be seen as impolite
- Bread is always served and you can order refills any time
- Service charge per person will be included in the bill (although not specifically mentioned)
- French normally drink wine with their meals, although not always at lunch time
- Tips are only given if you are happy with the service provided – even though it is not expected that you leave a tip. Tips are never more than €5

Top Tips

- Professionalism, knowledge of the market and the tourism industry is very much valued. The French like people who are able to have constructive discussions and able to debate and express their opinions
- Do not get offended if the French challenge you and argue. They like to know the context – do not consider this impolite
- Send your brochure(s) in advance. That way you will give the recipient time to digest the contents
- Respect is earned through the display of good character and personality. Traits such as sincerity, courage and strong leadership are all appreciated
- Punctuality is important. It shows respect and interest
- Be flexible
- Make sure you follow-up shortly after the meeting with an e-mail summarizing the points you discuss. If you have promised documents, information, contacts….please make sure you send the information over to your contact
- After your visit, renew contact with both those you did see and those you were unable to see
- Make an appointment to see VisitBritain France, let us know about your progress as regular market intelligence is essential for our future plans and activities. We will update you on the state of the market. But please do make an appointment early to avoid disappointment and keep VisitBritain informed of the results of your visit - both good and bad. It is vital that we get your impressions of the market and of the value of our help and services

14. Working with VisitBritain & Data Sources

14. Working with VisitBritain & Data Sources

Working with VisitBritain

Through our four-year marketing programme we aim to build the aspiration to travel to Britain, and the number of people visiting Britain - there are a number of ways that you can get involved, regardless of your business size or budget.

As the national tourism agency our commitment to you is to understand your business needs and provide you with sound market advice, support and opportunities that will help your business flourish internationally and we will work with you to ensure that you maximise your international marketing budget.

We offer a virtual reach around the world as well as a programme of exhibitions and missions in key markets. Our in-market teams understand what motivates travel from each individual market and what tourism experiences and products are in demand.

So whether you are looking to extend you reach through:

- Digital and social media, such as on the Lovewall, through Twitter, our Facebook page – Love GREAT Britain, or Pinterest
- Press and PR by sending us your newsworthy stories or hosting our journalists and broadcast crews
- Leisure, and in some markets, such as the US, the business travel trade via our programme of sales missions, workshops and exhibitions or promotion to our qualified Britagents
- Print advertising in targeted media/Britain supplements
- Retailing your product through the VisitBritain shop
- Or as a major campaign partner

We are here to support you and look forward to working with you.

To find out more browse our opportunity search (http://www.visitbritain.org/opportunitiesadvice/opportunitysearch) or contact the B2B events team (Email: events@visitbritain.org) or campaign partnerships team (Email: partnerships@visitbritain.org)

VisitBritain Contacts in Market

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Tel: 00 33 1 44 51 34 96
Email: cecile.laburthe@visitbritain.org

Contacting other Organisations

The British Embassy in France

British Embassy
35 rue du Faubourg Saint Honoré
75008 Paris – France
Tel: 01 44 51 31 00
http://ukinfrance.fco.gov.uk/fr

UK Trade and Investment in France

35 rue du Faubourg Saint Honoré
75008 Paris – France
Tel: +33 (0) 1 44 51 34 00
Email: commercialenquiries.paris@fco.gov.uk

The British Consulate in France

18 bis rue d'Anjou
75008 Paris
Tel 01 44 51 31 02
Fax 01 44 51 31 27

British Council France
9 rue de Constantine
75340 Paris Cedex 07
Tél 0033 (0)1 49 55 73 00
Fax 0033 (0)1 47 05 77 02
www.britishcouncil.org/fr

Data Sources

Table 14.1 Data Sources

Source	Charts/Tables
United Nations World Tourism Organisation	Table S1 (part)
Office for National Statistics, International Passenger Survey	Table S2, 2.1, 9.1, 9.2, 9.3, 10.1, Chart S1, S2, S3, 5.6, 5.7, 5.8, 5.9, 5.10, 8.1, 8.2, 9.1, 9.2, 9.3, 9.4, 9.5, 9.6, 9.7, 9.8, 9.9, 9.10, 9.11, 9.12, 9.13, 9.14, 9.15, 9.16, 10.1, 10.2, 10.3, 10.4, 10.5, 10.6, 10.7, 11.1, 11.2, 11.3, 11.4, 11.5, 11.6, 11.7, 11.8, 11.9, 12.1
EC Survey on the Attitudes of Europeans towards Tourism	Chart 4.1, 4.2, 4.5, 4.7, 5.4, 5.5
Arkenford study on behalf of VisitBritain	Chart 4.3, 4.4, 4.6, 5.2, 5.3, Table 6.2
Oxford Economics	Table 2.2, 3.2 (part)
International Monetary Fund	Table S4 (part), 3.2 (part)
US Census Bureau	Table S4 (part), 3.1, Chart 3.2
World-Gazetteer.com	Chart 3.1
Bank of England	Chart 3.3
Anholt GfK Nations Brand Index	Chart 6.1, 6.2, 6.3, 6.4, 6.6, Table 6.1
Anholt GMI Nations Brand Index (2007)	Chart 6.5
CIA Factbook	Chart 5.1 (part)
World Internet Stats	Chart 5.1 (part)
Tourism Economics	Table S1 (part), 7.1, Chart 7.1, 7.2, 7.3
Capstats.com	Table S3, Chart 8.3, 8.4, 8.5, 8.6
CAA Departing Passenger Survey	Chart 10.8, 10.9