

Positioning and potentials of Greenland on the GERMAN holiday travel market

Full report



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Introduction and background of this study



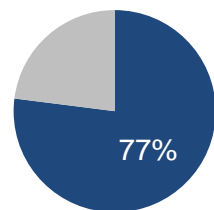
- » Visit Greenland has commissioned the Institute for Tourism Research in Northern Europe (NIT) to conduct a market research studies on the “Positioning and potential of Greenland” in eight European and North American countries (DE, FR, UK, DK, SE, NO, US, CA).
- » The central aim is to get a thorough and complete picture on the volume, the structure, the attitudes and images of the market potential of Greenland in these markets, in order to provide a sound basis for the future strategic planning of Greenland concerning its marketing efforts, product development and communication.
- » The studies followed the same methodological approach as previous studies 2016 in Germany, Great Britain and USA, 2017 in France and in 2018 in Scandinavia. Timeline analyses based on the new 2023 studies with the “old” studies of 2016/2017/2018 are possible.
- » The following reports are being published in the context of this multi-market study:
 - » One report on the German market
 - » One report on the French market
 - » One report on the UK market
 - » One report on the Scandinavian market
 - » One report on the North American market
 - » One comparative report covering the baseline information of all the five markets.
- » **This document is the market report about the GERMAN market.**
- » The results are based on 3,000 online interviews that were conducted in Germany in January 2023 by our partner Dynata. The results are representative for the German-speaking population in Germany aged 18-75 years.



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General interest to travel to remote destinations in the German population



77% of the German population would like to go to at least one of these 10 remote destinations in the next 5 years

2016

Destination	2023 Interest	2016 Interest
Iceland	42%	28%
Canada	42%	35%
New Zealand	40%	-
Northern Scandinavia	34%	-
 Greenland	16%	9%
Faroe Islands	14%	8%
Alaska	13%	11%
Svalbard Islands	12%	8%
Patagonia	9%	-
Antarctica	6%	-

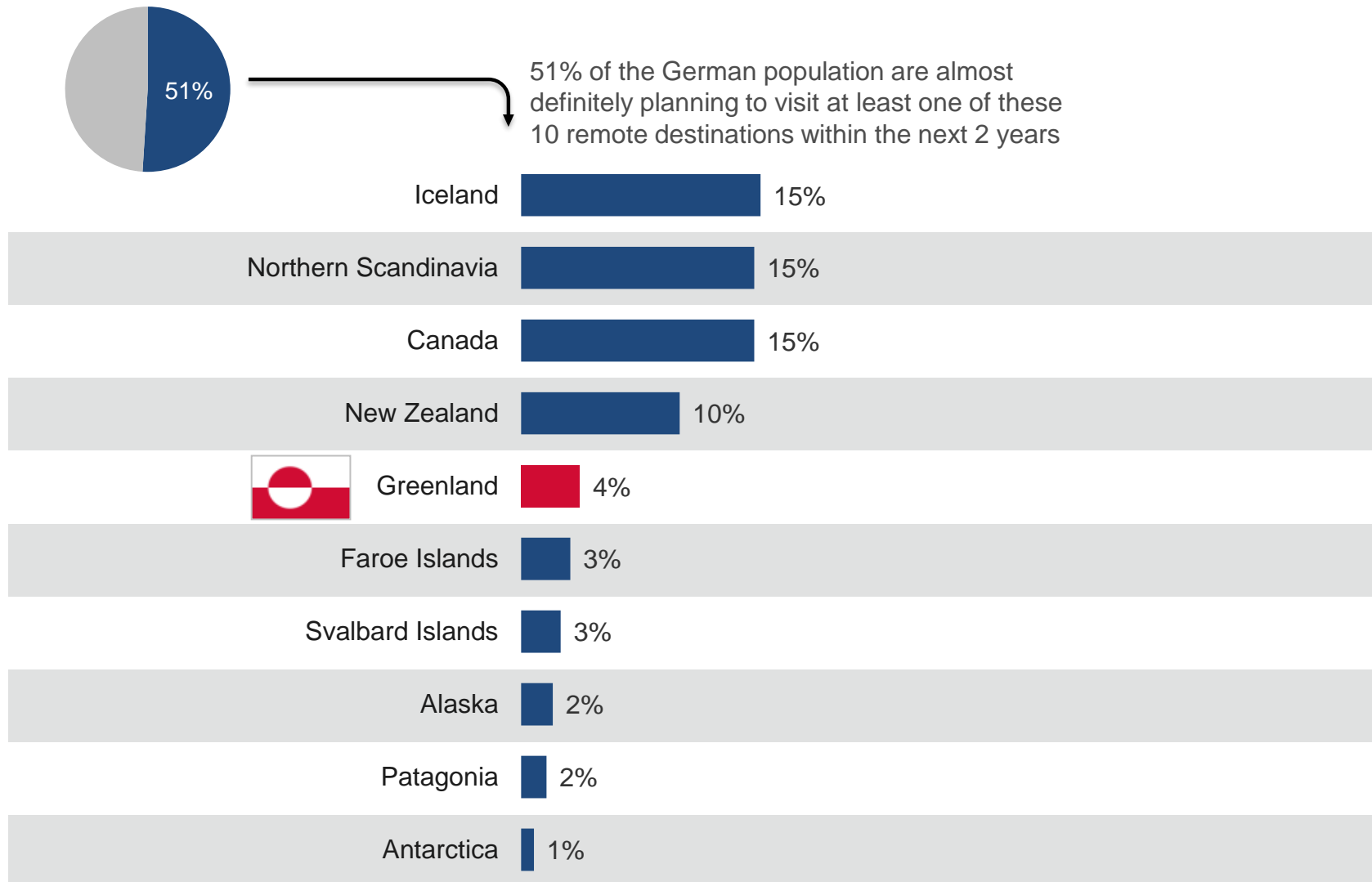
- » To identify the “general” potential of Greenland and competitive remote destinations, we asked “Which of these destinations would you like to visit within the next 5 years?”
- » 77% of the German population would like to go to at least one of these 10 remote destinations in the next 5 years.
- » Iceland is the most popular destination in terms of general interest. Canada, New Zealand, and Northern Scandinavia follow.
- » 16% would like to go to Greenland.
- » Compared to 2016 the shares of the surveyed countries increased. Interest to travel to Greenland increased by 7%-pts since 2016.
- » **Attention: The list of destinations in 2016 was different from 2023. This might have a methodological effect on the results.**

Which of these destinations would you like to visit within the next 5 years?

Basis: All respondents in Germany (n=3,000)

Source: Visit Greenland market study Germany 2023 by NIT, NATA market study Germany 2016 by NIT

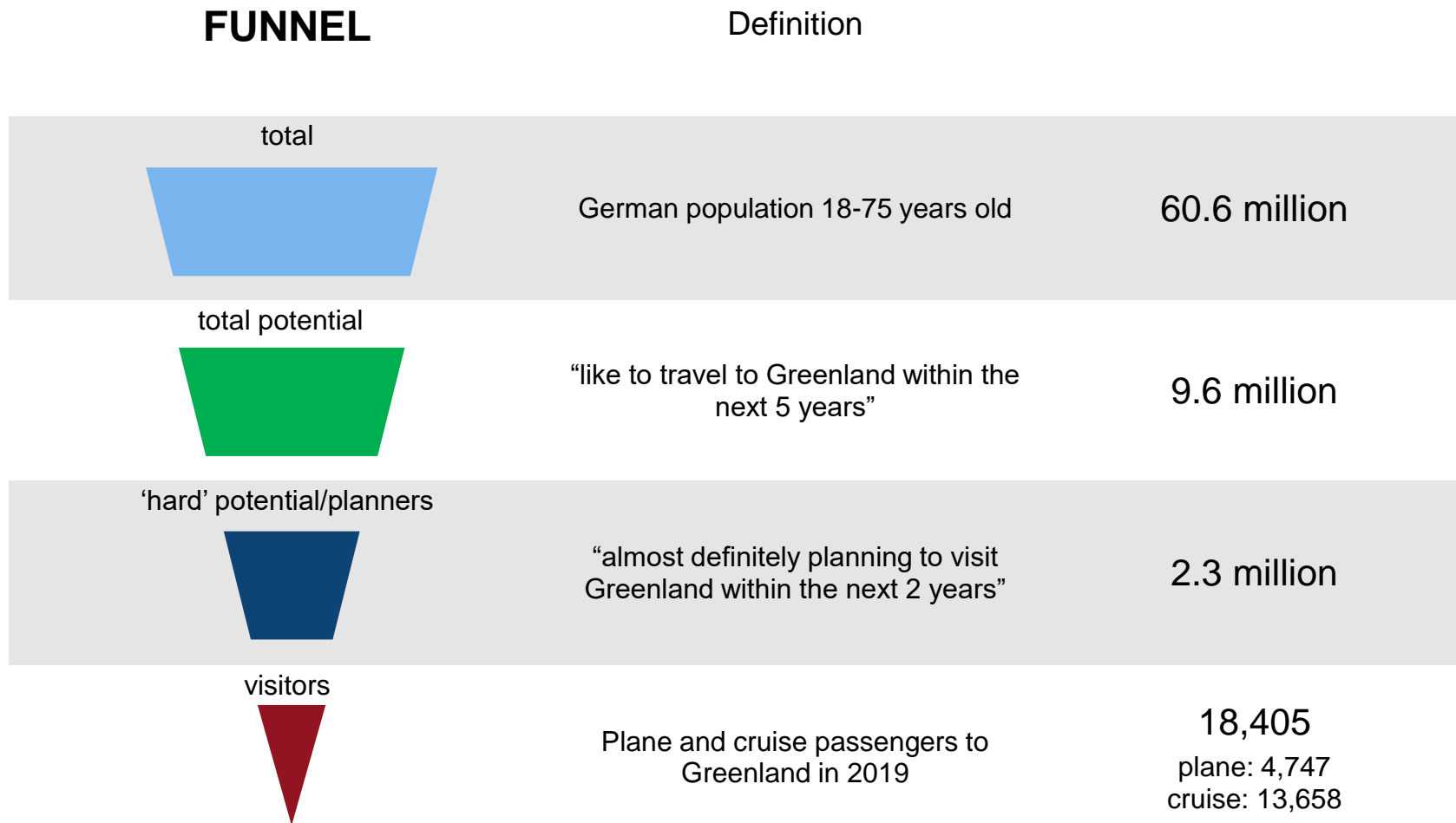
“Hard potential” to travel to remote destinations in the German population



- » To identify the “hard” potential of Greenland and competitive remote destinations, and to put the general potential into perspective, we asked “Which of these destinations are you almost definitely planning to visit within the next 2 years?”
- » 51% of the German population are almost definitely planning to visit least one of these 10 remote destinations within the next 2 years.
- » Iceland is the most popular destination in terms of this “hard potential”, Northern Scandinavia and Canada follow.
- » 4% are almost definitely planning to visit Greenland.

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

Volume extrapolations of actual and potential travellers to Greenland in Germany total




- » The volume funnel puts the reported market shares in relation to the actual market size and delivers concrete volume figures.
- » In the population of 61 million Germans 18-75 years old, you find almost 10 million who are generally interested to travel to Greenland in the next 5 years.
- » The hard potential of “almost definitely planning to visit Greenland within the next 2 years” represents more than 2 million persons.
- » Comparing this with the actual pre-pandemic German arrivals in Greenland of 18,000 in 2019 shows that you only need to activate a small proportion of the potential travellers to achieve “good” numbers from this market.

Source: Visit Greenland market study Germany 2023 by NIT

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



 Potential travellers to Greenland would also like to visit within the next 5 years	... are almost definitely planning to visit within the next 2 years
Greenland	100%	24%
Iceland	73%	27%
Canada	60%	21%
New Zealand	58%	15%
Northern Scandinavia	53%	18%
Alaska	37%	6%
Faroe Islands	33%	7%
Svalbard Islands	31%	6%
Antarctica	21%	2%
Patagonia	17%	3%

- » In Germany, potential travellers to Greenland are also interested in 3.8 other remote destinations in our question set.
- » The fiercest competitor is by far Iceland. 73% of the potential Greenland travellers also want to go there.
- » It is followed by Canada, New Zealand, Northern Scandinavia and Alaska.
- » 24% of the total potential Greenland travellers are almost definitely planning to visit Greenland in the next 2 years.
- » Even more, 27%, are almost definitely planning to visit Iceland in the next 2 years. Other destinations where potential Greenland travellers are almost definitely planning to visit in the next 2 years are Canada, Northern Scandinavia and New Zealand.

Basis: Potential travellers to Greenland in Germany (n=477)
Source: Visit Greenland market study Germany 2023 by NIT

To learn 1: Interest to travel to remote destinations



Interest to travel to remote destinations

- » 77% of the German population would like to go to at least one of the ten remote destinations in our questionnaire in the next 5 years. 51% are almost definitely planning to go to at least one of these destinations in the next 2 years.
- » Iceland is the most popular destination in terms of general interest, Canada, New Zealand and Northern Scandinavia follow.
- » Iceland, Northern Scandinavia and Canada are also the most popular destinations in terms of the “hard potential”.
- » 16% of the Germans would like to go to Greenland in the next 5 years and 4% are almost definitely planning to go there in the next 2 years.
- » Compared to 2016 the “general” potential of all the surveyed countries has increased. Interest to travel to Greenland increased by 7%-pts since 2016. As the list of destinations in 2016 was different, there may have been a methodological effect on the results.

Competitive situation in Germany

- » A look at the competitive situation of Greenland shows that in Germany, potential travellers to Greenland are also interested in 3.8 other remote destinations in our question set.
- » The fiercest competitor is by far Iceland. 73% of the potential Greenland travellers also want to go there. It is followed by Canada, New Zealand, Northern Scandinavia and Alaska.
- » Looking further into the details, there is a high likelihood that within the next two years the potential Greenland travellers end up in Iceland and to a lesser extent in Canada, Northern Scandinavia or New Zealand before they actually travel to Greenland.

- » Compared with the actual visitors, there is a huge interest to travel to Greenland in Germany. This means there is quite some leeway for destination marketing. The following part of the report should help with strategic marketing decisions.
- » When looking at the comparison over time and the development since 2016, it shows that the potential for all surveyed countries has increased and the share of those Germans interested in going to Greenland within the next 5 years almost doubled.
- » The results also show that on the German market, Greenland is in fierce competition with other (remote) destinations around the world.

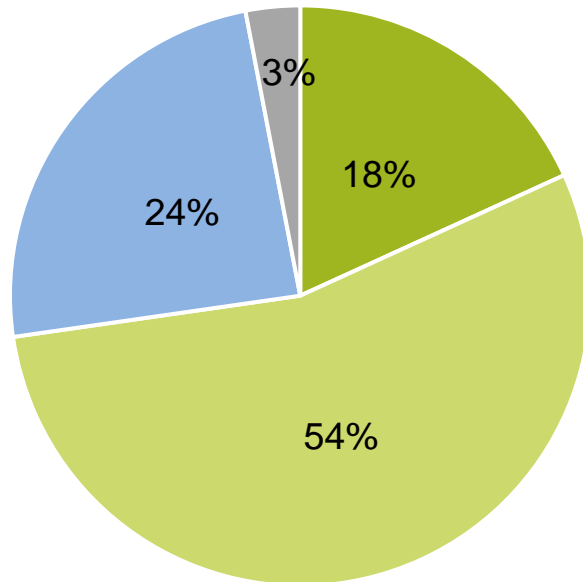


2. Image of Greenland as a holiday destination

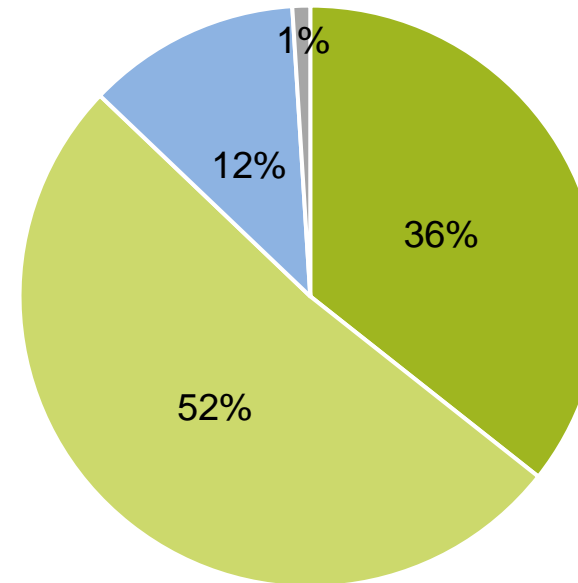
Knowledge of Greenland in the German population vs. potential travellers to Greenland



population



Potential travellers to Greenland



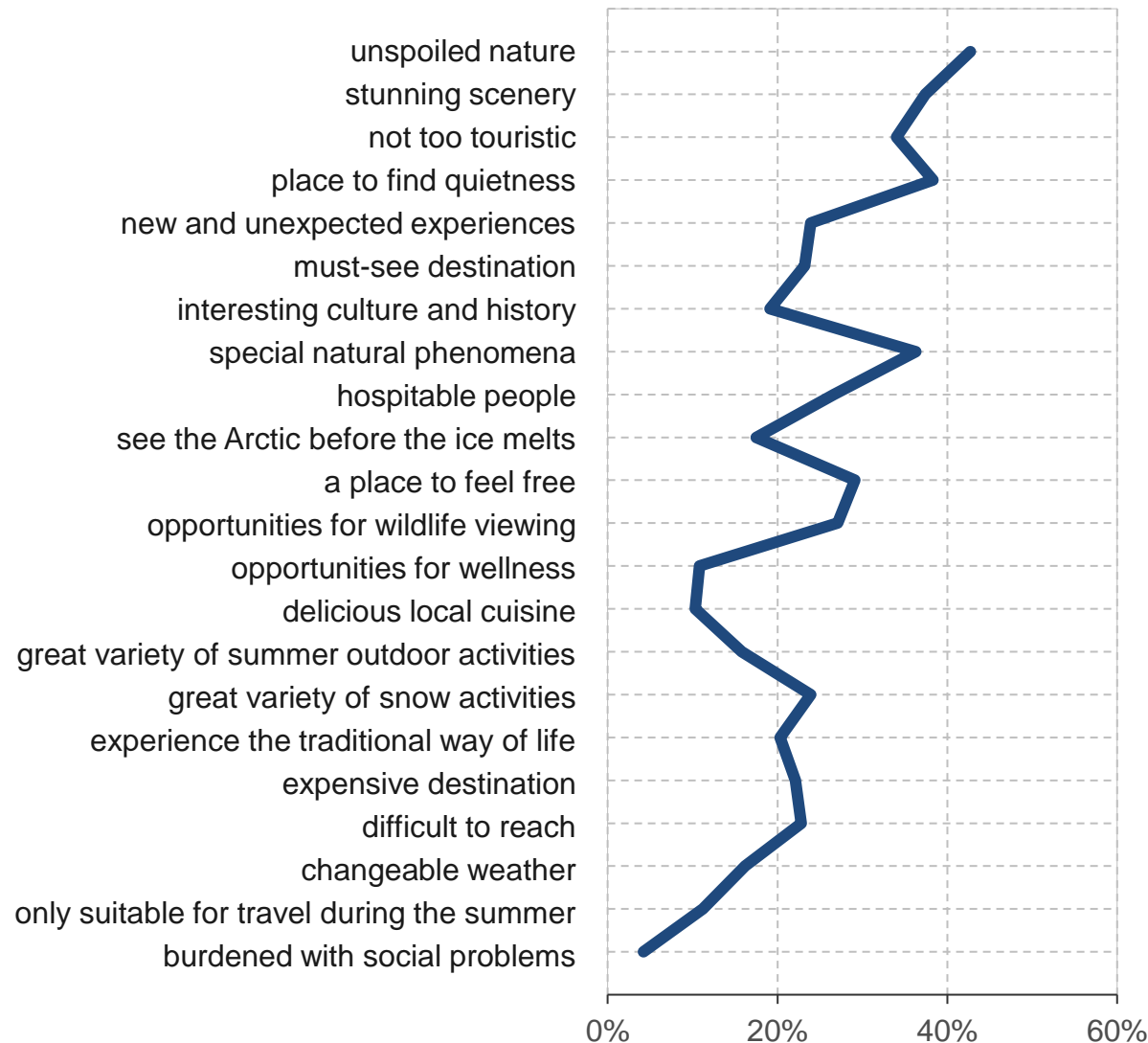
- » Those Germans who have never been to Greenland where asked about their knowledge of Greenland as a travel destination.
- » 18% claim to have heard or read a lot about Greenland and can therefore be considered as having high knowledge about the country.
- » More than half (54%) have only a vague idea of Greenland and almost a quarter (24%) knows the country only by name. A very small minority of 3% has never heard of Greenland.
- » Looking at the potential travellers to Greenland, the share of those knowing a lot about Greenland doubles compared to the general population.



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

How well do you know Greenland as a travel destination?
 Basis: Respondents, in Germany who have not been previously in Greenland (population: n=2,879; potential travellers: n=419)
 Source: Visit Greenland market study Germany 2023 by NIT

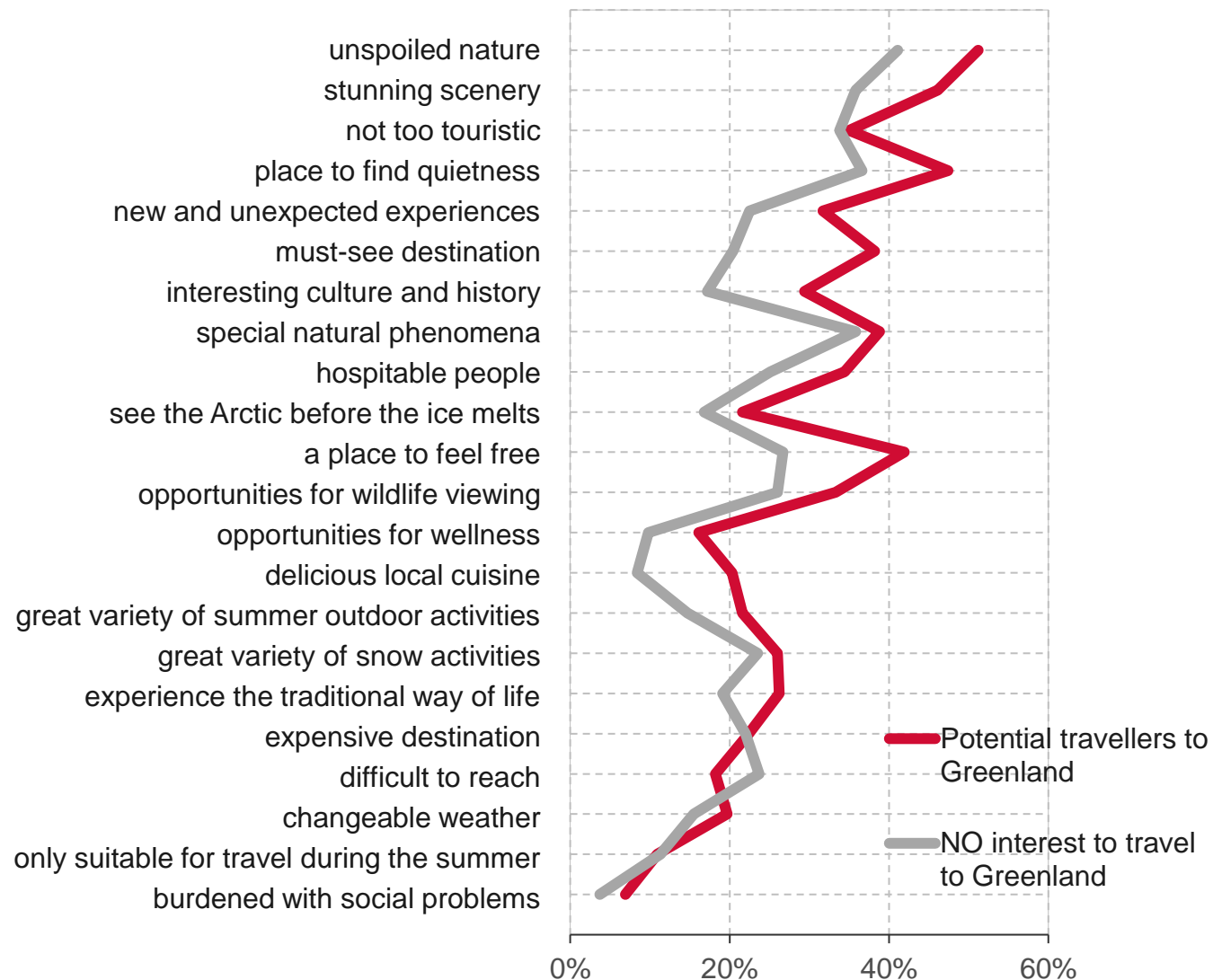
Image of Greenland in the German population



- » The **key image factors** of Greenland in the German population are:
 - » Unspoiled nature (43%)
 - » A place to find quietness (38%)
 - » Stunning scenery (37%)
 - » Natural phenomena (36%)
 - » Not too touristic (34%)
- » Greenland is **not famous** for:
 - » Only suitable for travelling in the summer (11%)
 - » Delicious local cuisine (10%)
 - » Opportunities for wellness (10%)
 - » Social problems (4%)
- » Persons in Germany name on average 5.1 of the 21 characteristics in the question.

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

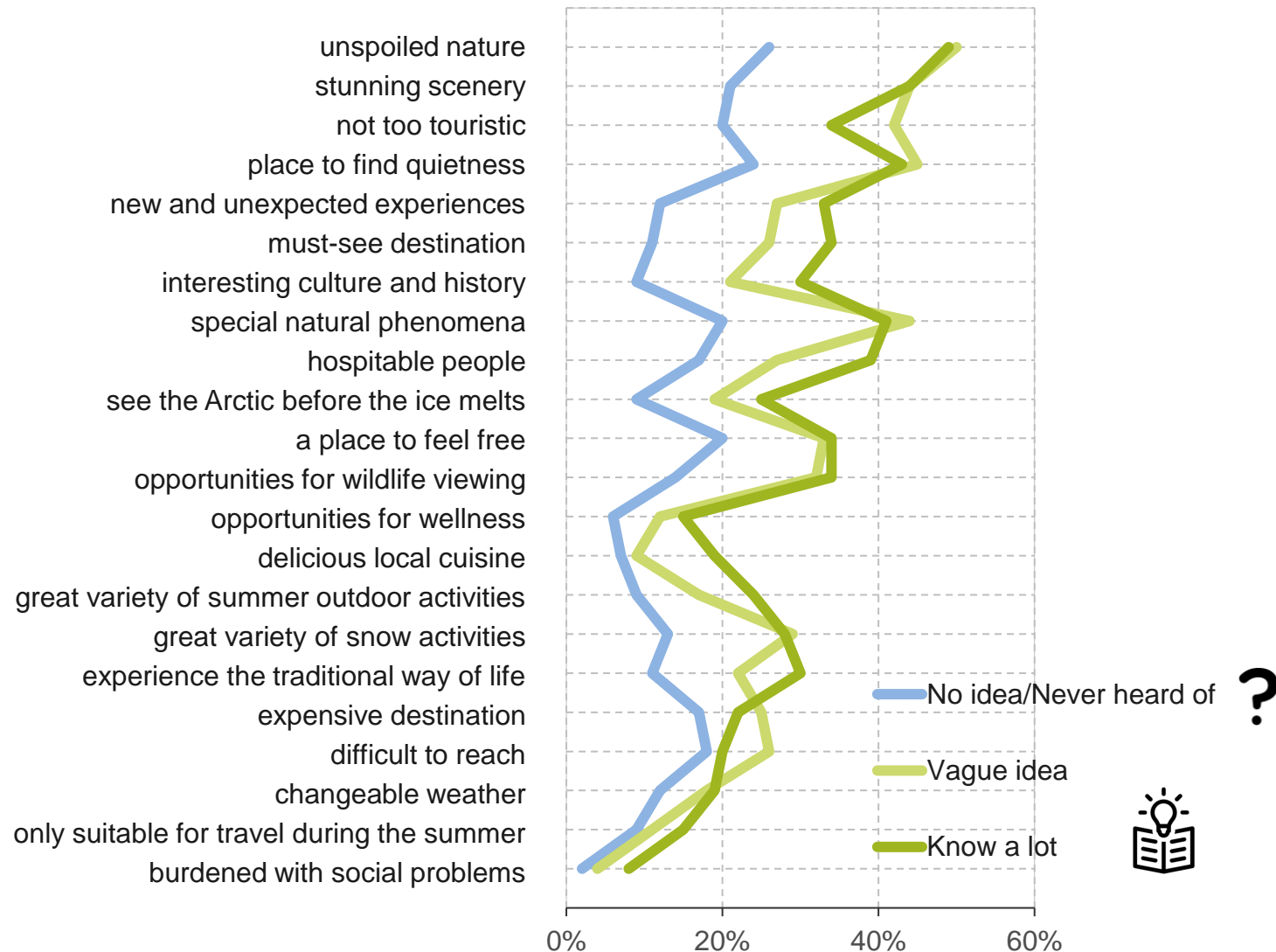
Image of Greenland in the German population: With/without interest to travel to Greenland



- » The **most striking differences** of persons WITH interest to travel to Greenland compared to persons WITHOUT interest can be found here:
 - » Must-see destination (+18%-pts.)
 - » A place to feel free (+15%-pts.)
 - » Interesting culture/history (+12%-pts.)
 - » Delicious local cuisine (+12%-pts.)
 - » Stunning scenery (+10%-pts.)
 - » Unspoiled nature (+10%-pts.)
- » The only characteristic, where persons with NO interest show higher figures is “difficult to reach” (+5%-pts.)
- » Persons WITH interest to travel to Greenland name on average 6.4 of the 21 characteristics in the question. Persons with NO interest name 4.9 characteristics.

Please tell me which of these characteristics do you think particularly apply to Greenland?
 Basis: Respondents in Germany WITH interest to travel to Greenland (n=477) and WITHOUT interest to travel to Greenland (n=2,523)
 Source: Visit Greenland market study Germany 2023 by NIT

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

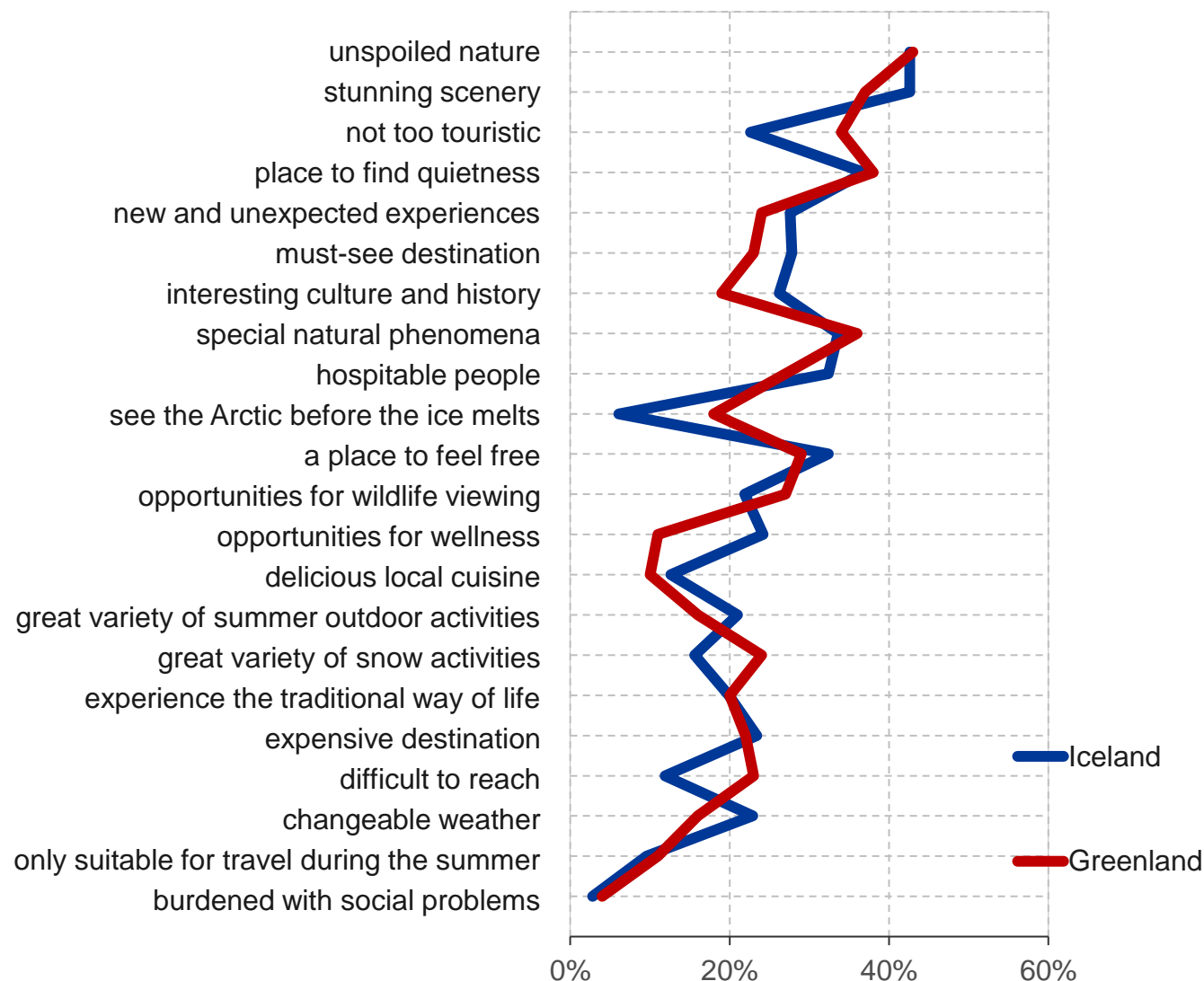


- » Higher knowledge leads to higher image figures of most nature and culture topics such as (comparison “know a lot” vs. “no idea”):
 - » Unspoiled nature, stunning scenery, must-see destination (+23%-pts.)
 - » Hospitable people (+22%-pts.)
 - » New unexpected experiences, interesting culture and history, natural phenomena (+21%-pts.), wildlife watching (+20%-pts.).
- » The groups are closer to each other regarding aspects such as Greenland being an expensive destination, hard to reach, with changeable weather, suitable for summer and having social problems.
- » Persons who “know a lot” name on average 6.4 of the 21 characteristics in the question. Persons with a vague idea 5.8 and those with NO knowledge only name 3.1 characteristics.



Please tell me which of these characteristics do you think particularly apply to Greenland?
 Basis: All respondents in Germany with knowledge (n=525), a vague idea (n=1,563) and with no idea and never heard of Greenland (n=791) of Greenland
 Source: Visit Greenland market study Germany 2023 by NIT

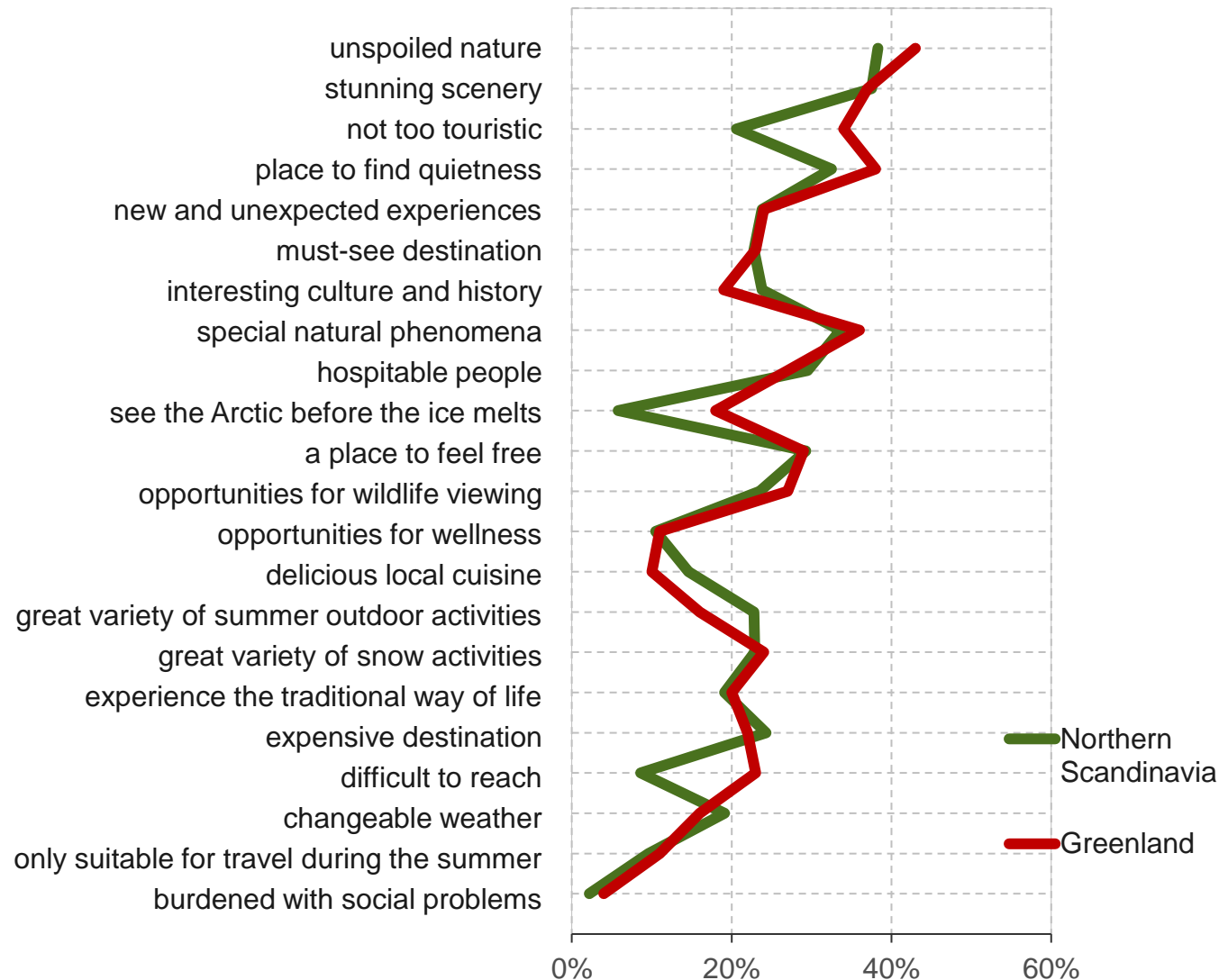
Benchmarking the image of Greenland and Iceland on the German market



- » In addition to the image of Greenland, the questionnaire also asked for the image of Iceland and Northern Scandinavia.
- » Comparing the images of Greenland and Iceland, we can observe the top characteristics being the same: “unspoiled nature”, “place to find quietness” and “natural phenomena”.
- » **More characteristic for Greenland** than for Iceland:
 - » See the Arctic now (+12%-pts.)
 - » Not too touristic (+11%-pts.)
 - » Difficult to reach (+11%-pts.)
- » **More characteristic for Iceland** than for Greenland:
 - » Wellness (+13%-pts.)
 - » Changeable weather (+7%-pts.)
 - » Culture & history (+7%-pts.)

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

Benchmarking the image of Greenland and Northern Scandinavia on the German market



- » In addition to the image of Greenland, the questionnaire also asked for the image of Iceland and Northern Scandinavia.
- » Comparing the images of Greenland and Northern Scandinavia, we can observe the top characteristics being the same: “Stunning scenery” and “Unspoiled nature”.
- » **More characteristic for Greenland** than for Northern Scandinavia:
 - » Difficult to reach (+14%-pts.)
 - » Not too touristic (+13%-pts.)
 - » See the Arctic now (+12%-pts.)
- » **More characteristic for Northern Scandinavia** than for Greenland:
 - » Summer outdoor activities (+7%-pts.)
 - » Delicious local cuisine (+5%-pts.)
 - » Culture & history (+5%-pts.)

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

To learn 2: Image of Greenland on the German market



Knowledge of Greenland in Germany

- » 18% of the population with no previous travel to Greenland heard or read a lot about Greenland, 54% have only a vague idea and 24% know the country only by name. A very small minority of 3% has never heard of Greenland.
- » For the potential travellers to Greenland, the share of those knowing a lot about Greenland doubles compared to the general population.

Image Greenland in Germany:

- » The key image factors of Greenland in German population are: Unspoiled nature, a place to find quietness, stunning scenery, natural phenomena and not too touristic. Greenland is not famous for being only suitable for travelling in the summer, its delicious local cuisine, opportunities for wellness and being burdened with social problems.
- » Persons in Germany name on average 5.1 of the 21 characteristics in the question. Persons WITH interest to travel to Greenland consider it much more to be a must-see destination, a place to feel free, to have interesting culture/history, a delicious local cuisine, a stunning scenery and unspoiled nature. Persons with interest to travel to Greenland name on average 6.4 of the 21 characteristics in the question. Persons with NO interest name 4.9 characteristics.

- » Comparing the image depending on the knowledge of Greenland, higher knowledge leads to higher image figures of most nature and culture topics: Persons who “know a lot” name on average 6.4 of the 21 characteristics in the question. Persons with a vague idea 5.8 and those with NO knowledge only name 3.1 characteristics.

Image benchmarking in Germany: Greenland and competitors

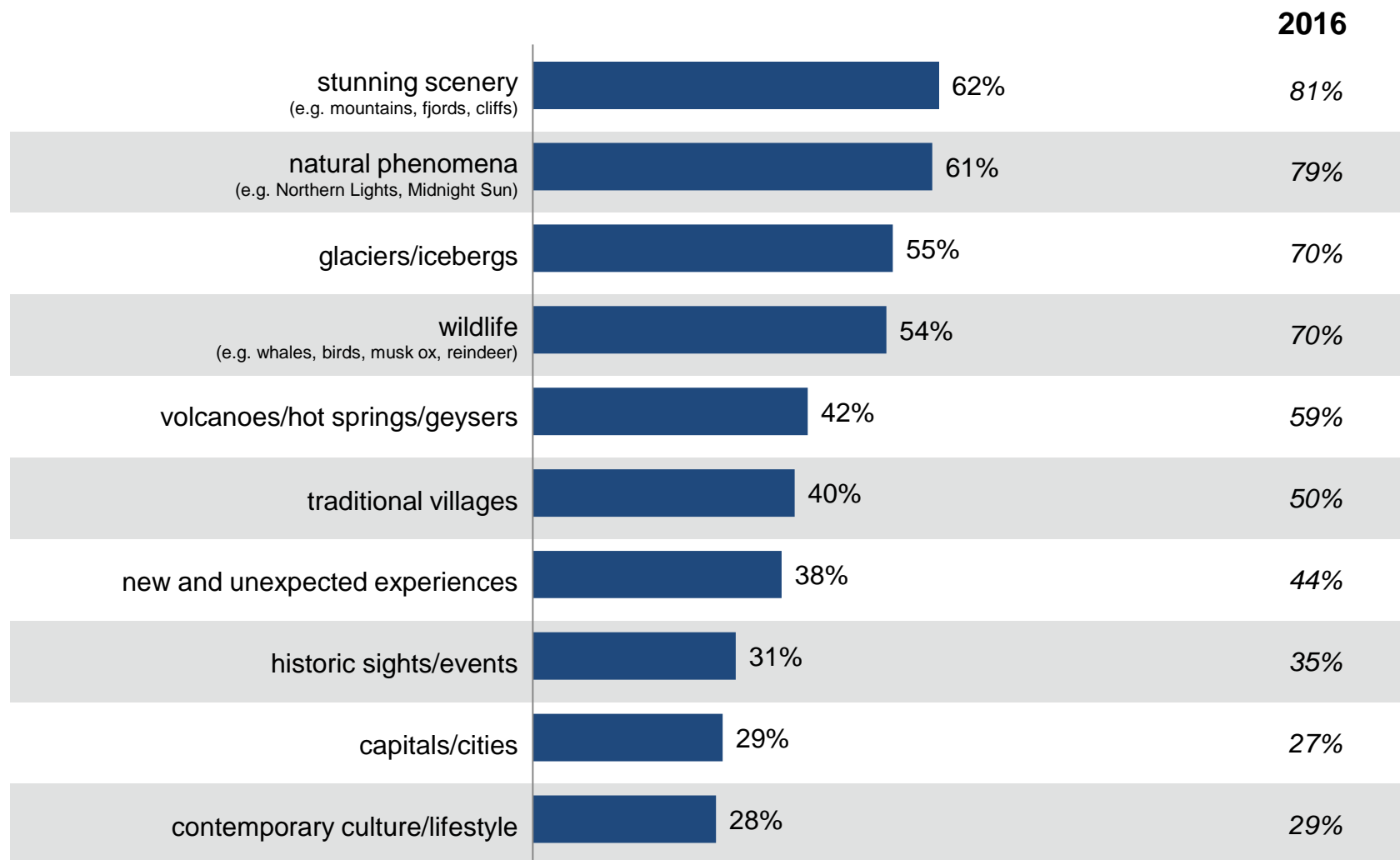
- » When benchmarking the images of Greenland and its main competitors Iceland and Northern Scandinavia, we find that stunning scenery, unspoiled nature and natural phenomena are important image factors in all those destinations.
- » Greenland is sticking out over its two competitors regarding the following image characteristics: Seeing the Arctic now, not too touristic and difficult to reach.
- » The other destinations are sticking out over Greenland regarding the following characteristics:
 - » Iceland: Wellness, changeable weather, culture & history
 - » Northern Scandinavia: Summer outdoor activities, delicious local cuisine, culture & history

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



3. Greenland product preferences

Potential travellers to Greenland: Preferred holiday experiences in Greenland



- » For potential Greenland travellers in Germany it is most important to experience the stunning scenery, natural phenomena, glaciers/icebergs and the wildlife when travelling to Greenland.
- » Historic sights, cities and contemporary lifestyle are at the bottom of the ranking – but with figures of still around 30%.
- » On average 4.4 of the 10 aspects are of interest for potential Greenland travellers in Germany.
- » Compared to 2016 the ranking of the experiences did not change. However, the figures for almost all experiences are lower now than they have been in 2016. Also the ratio between the top (nature oriented) and bottom ranking experiences (culture oriented) is now a bit more balanced than in 2016.

When thinking about travelling to Greenland what would you like to see/experience?
 Basis: Potential travellers to Greenland from Germany (n=477)
 Source: Visit Greenland market study Germany 2023 by NIT, NATA market study Germany 2016 by NIT

Potential travellers to Greenland: Preferred holiday activities in Greenland

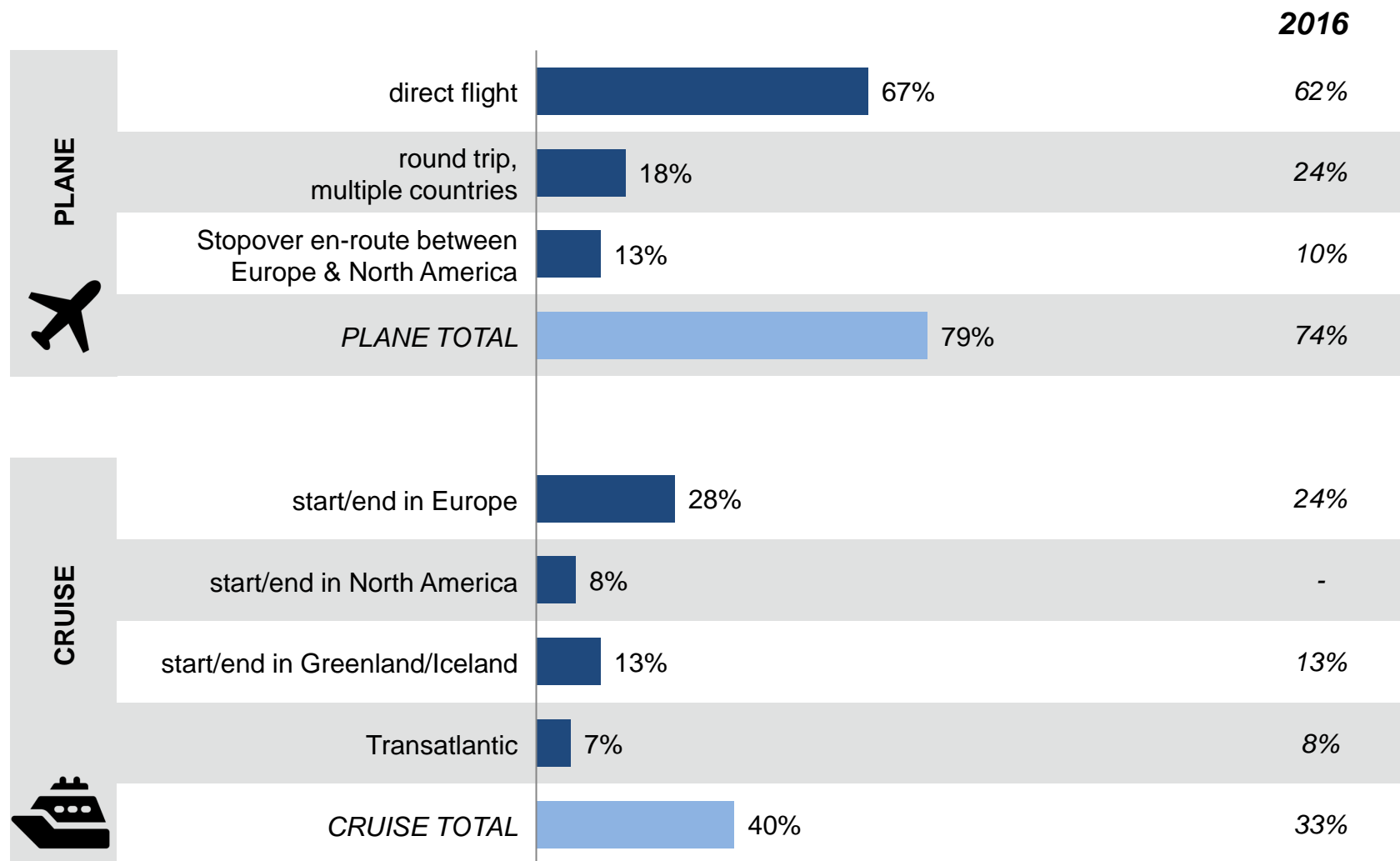


		2016
experiencing quietness	57%	56%
photography	53%	67%
hiking	52%	57%
wildlife watching	51%	68%
eating/drinking local specialties	37%	57%
guided nature excursions	37%	61%
dog sledding	36%	48%
meeting/mingling with the locals	35%	43%
glacier hiking	34%	41%
swimming/wellness	27%	30%
learning about local handicraft	26%	39%
guided cultural tours	26%	37%
shopping for souvenirs	25%	30%
“polar plunge”	20%	-
kayaking	19%	23%
cycling	16%	18%
fishing	14%	13%
horseback riding	12%	14%
skiing	10%	10%
trophy hunting	4%	2%

- » The most sought-after activities in Greenland by potential travellers from Germany are experiencing quietness, photography, hiking and wildlife watching.
- » Potential travellers from Germany named on average 5.9 activities as interesting to them, while the potential traveller of 2016 named on average 7.1 activities.
- » Compared to 2016 this means a slight change of the ranking. Some special nature focussed activities have become somewhat less important whereas “general” sensual experiences have stepped up in the ranking.
- » Figures for “niche” activities such as kayaking, fishing, skiing have remained comparatively stable.

Which of the following activities would you like to do when travelling to Greenland?
 Basis: Potential travellers to Greenland from Germany (n=477)
 Source: Visit Greenland market study Germany 2023 by NIT, NATA market study Germany 2016 by NIT

Potential travellers to Greenland: Preferences about getting to Greenland



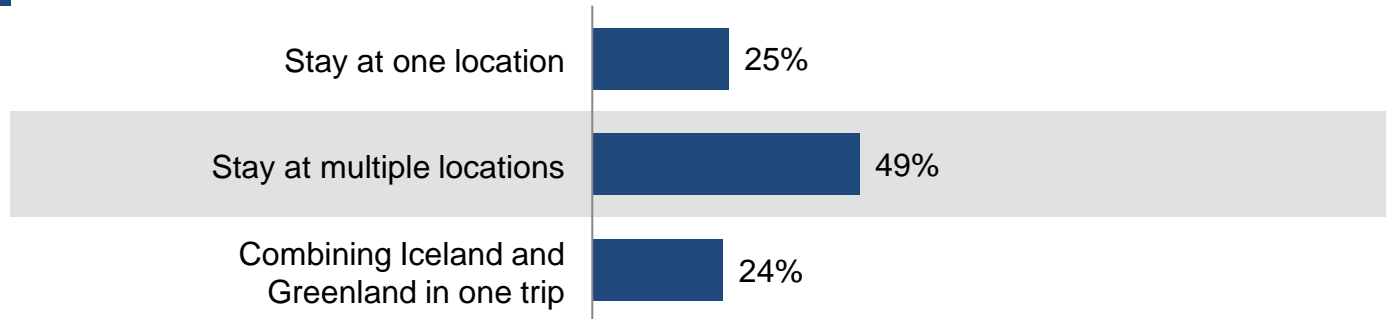
- » In total, 79% of the potential Greenland guests in Germany would prefer the **plane** to travel to Greenland
- » In detail, 67% prefer direct flights to Greenland; 18% want to visit Greenland during a multi country air trip and 13% as a stop between Europe and North America.
- » Compared to 2016 more people prefer direct flights while the share of those interested in a round trip with multiple countries has decreased (2016: 24%).
- » 40% of the potential guests in Germany would like to visit Greenland on a **cruise**.
- » In detail, 28% prefer the start/end to be in Europe, 13% would like it to start/end in Greenland/Iceland.
- » Compared to 2016, this means a higher interest for cruises in general and for cruises from/to European ports.

How would you like to travel to Greenland?
 Basis: Potential travellers to Greenland from Germany (n=477)
 Source: Visit Greenland market study Germany 2023 by NIT, NATA market study Germany 2016 by NIT

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

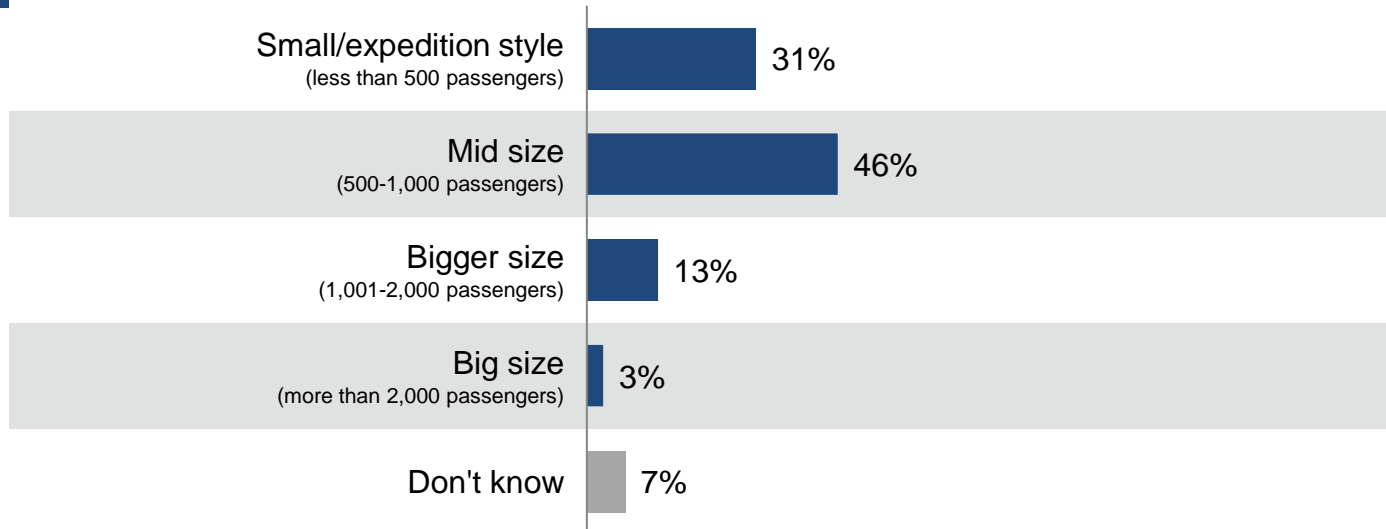


Travel by plane



» Among the potential **plane** travellers (direct or with stop over), 49% prefer visiting multiple locations while in Greenland. 25% would like to stay at one location in Greenland and 24% can imagine combining Iceland and Greenland in one trip.

Travel by cruise



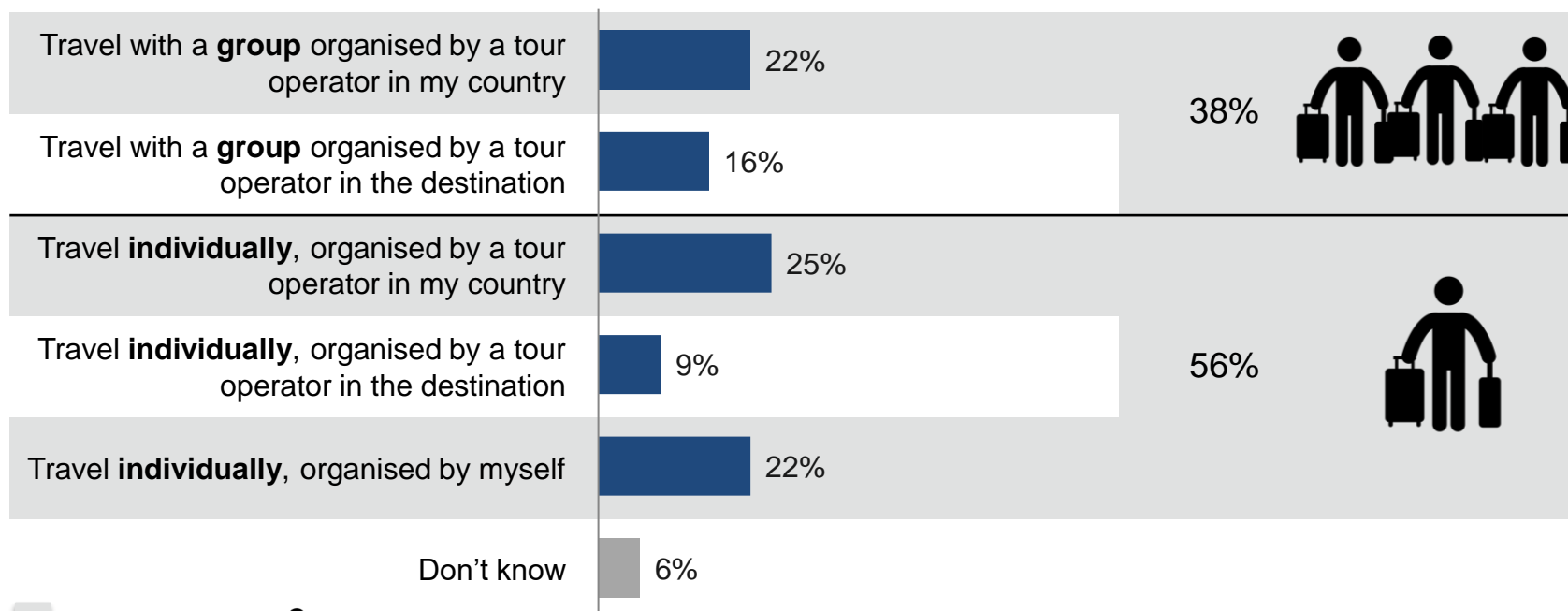
» Among the potential **cruise** travellers, the majority (46%) prefers a mid sized ship with 500 to 1,000 passengers and 31% prefer an even smaller or expedition style ship with less than 500 passengers. Only 13% are interested in a bigger sized ship with up to 2,000 passengers and only minority of 3% would like to have a big sized ship with more than 2,000 passengers.

Plane preferences: How would you like to experience your stay in Greenland? Cruise preferences: What kind of ship would you prefer for a cruise to Greenland?

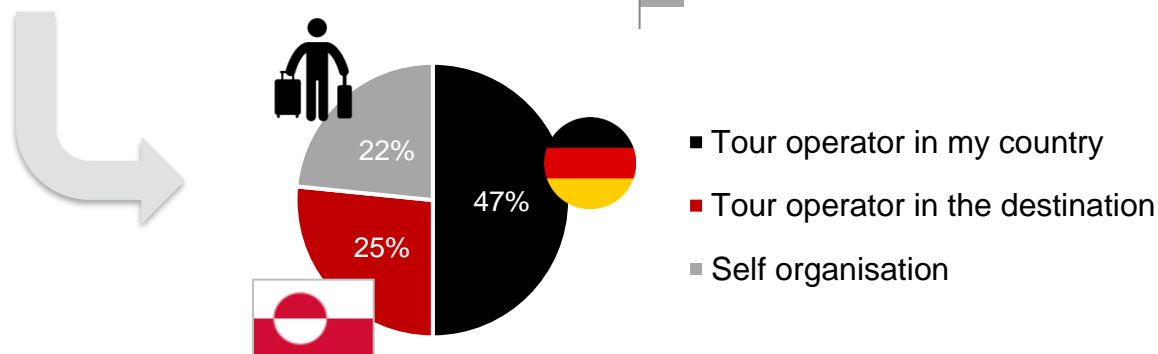
Basis: Potential travellers to Greenland from Germany that prefer going to Greenland by plane with direct flight or stop over (n=344) and by cruise (n=190)

Source: Visit Greenland market study Germany 2023 by NIT

Potential travellers to Greenland: Preferences about travel organisation to Greenland

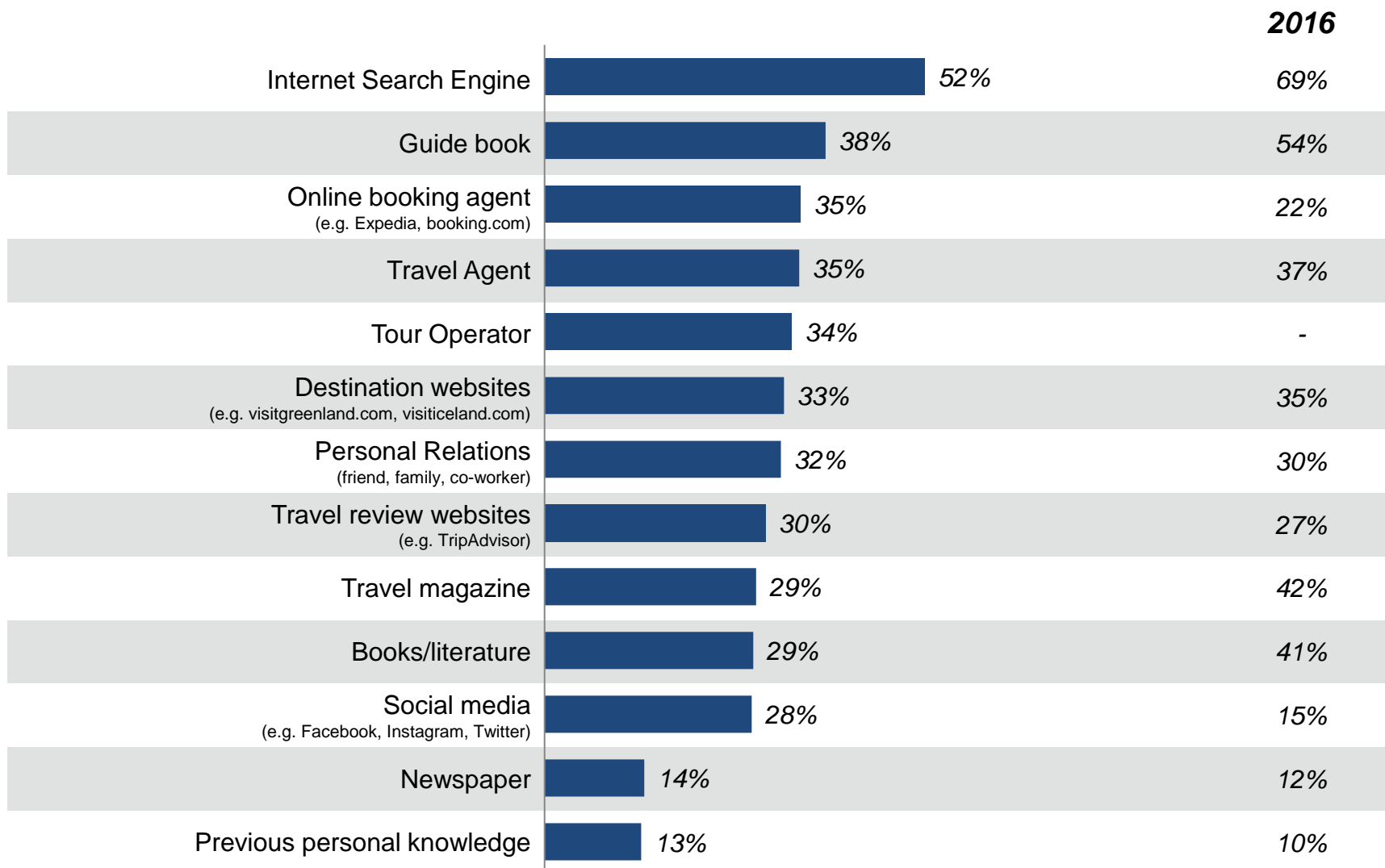


- » Among the potential **plane** travellers, the majority prefers to travel individually (56%), either organised by a tour operator in Germany (25%) or by themselves (22%).
- » 38% prefer travelling with a group.
- » Overall, most German plane traveller prefer the organisation of their Greenland trip by an operator in Germany.



How would you like to organize your trip to Greenland?
 Basis: Potential travellers to Greenland from Germany that prefer going by plane (n=378)
 Source: Visit Greenland market study Germany 2023 by NIT

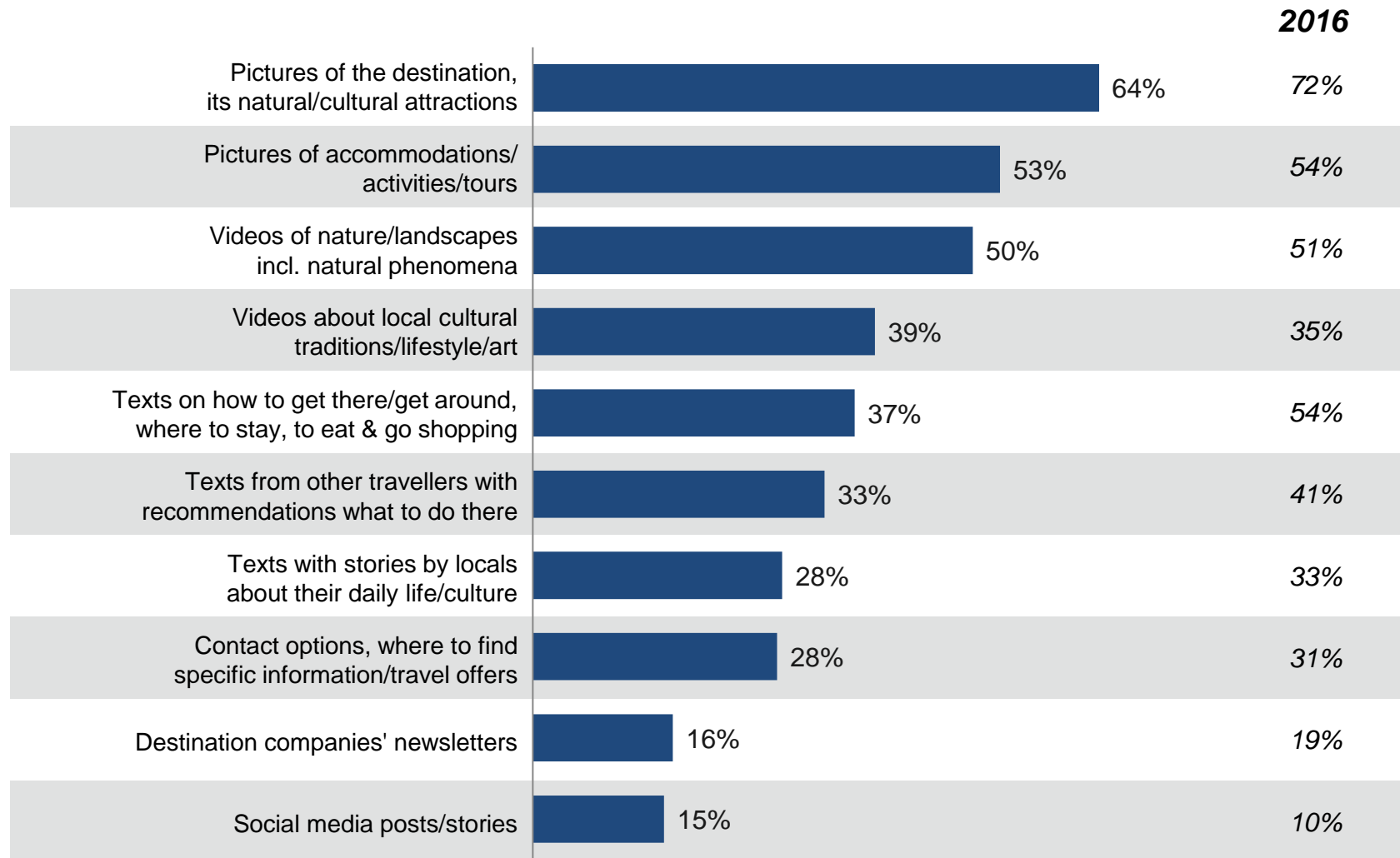
Potential travellers to Greenland: Preferred sources for inspiration & information



- » By far the most popular source for information and inspiration of potential travellers in Germany when planning a trip to Greenland are internet search engines (52%).
- » With some distance follow guide books (38%), online booking agents (35%), travel agent (35%), tour operator (34%), destination websites (33%) and personal relations (32%), all on a similar level.
- » Compared to 2016 online booking agents and social media (each +13%-pts.) became more relevant for inspiration and information. While classic offline sources, such as travel magazines and books/literature (each -13%-pts.) became less relevant. Despite still being at the top, the figure for internet search engines also dropped significantly (by 17%-pts.)

When thinking about travelling to Greenland how would you like to look for inspiration/information for this trip?
 Basis: Potential travellers to Greenland from Germany (n=477)
 Source: Visit Greenland market study Germany 2023 by NIT, NATA market study Germany 2016 by NIT

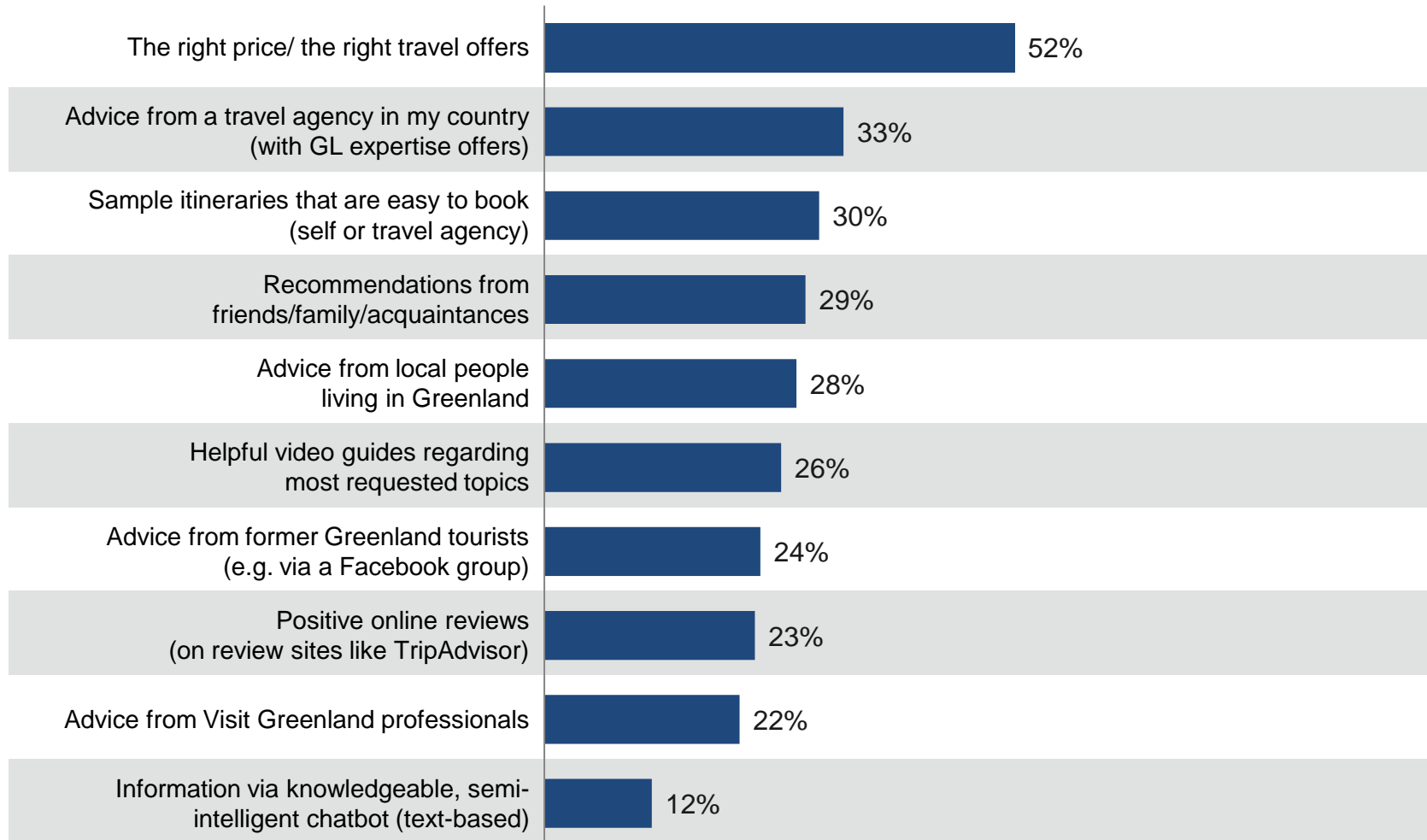
Potential travellers to Greenland: Preferred kind of online content



- » When asked for their preferred kind of online content, most potential Greenland guests in Germany favour destination images or videos ahead of factual texts on the travel product.
- » These seem to be basic prerequisites that every travel website should offer.
- » Only a minority is interested in destination newsletters or social media posts.
- » However, compared to results in 2016 social media information as well as videos with a more personal angle became more important (+5%-pts.). While texts on how to get around lost and are now less important (-18%-pts.).

Which kind of content do you like to find when looking for online information about Greenland?
 Basis: Potential travellers to Greenland from Germany (n=477)
 Source: Visit Greenland market study Germany 2023 by NIT, NATA market study Germany 2016 by NIT

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



- » This question was added to find out more about the very last step within the travel decision process; the results show the clear dominance to find the “right” product with the “right” price.
- » Following, but on a lower level of approval, are advice from a travel agency in their own country, and sample itineraries as well as personal recommendation and advice from locals.
- » Recommendations via online sources (videos, tourists via social media or online reviews) are relevant for every fourth potential traveller in Germany.
- » Advice from Visit Greenland professionals ranked relatively low, with 22% considering this as relevant final decisive input.

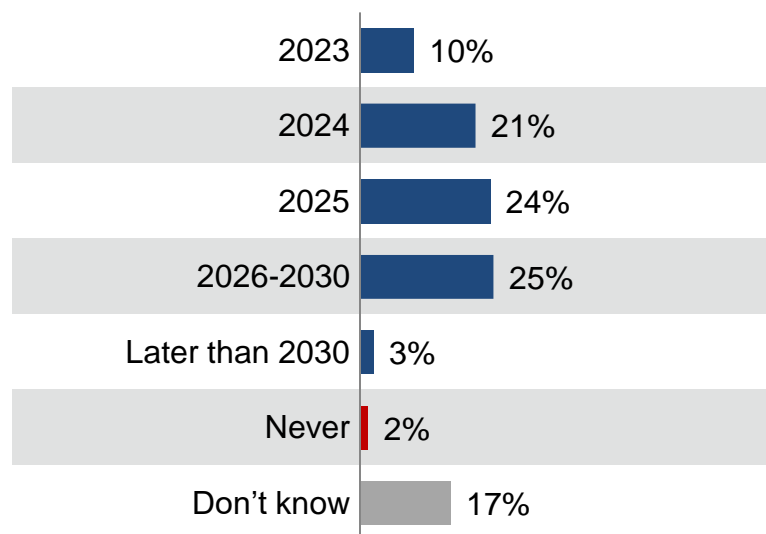
You have indicated that you would like to visit Greenland within the next 5 years. Please now imagine yourself being in a situation where you're almost ready to book, but still need the final decisive input. What kind of input would be most relevant for you?

Basis: Potential travellers to Greenland from Germany (n=477)
Source: Visit Greenland market study Germany 2023 by NIT

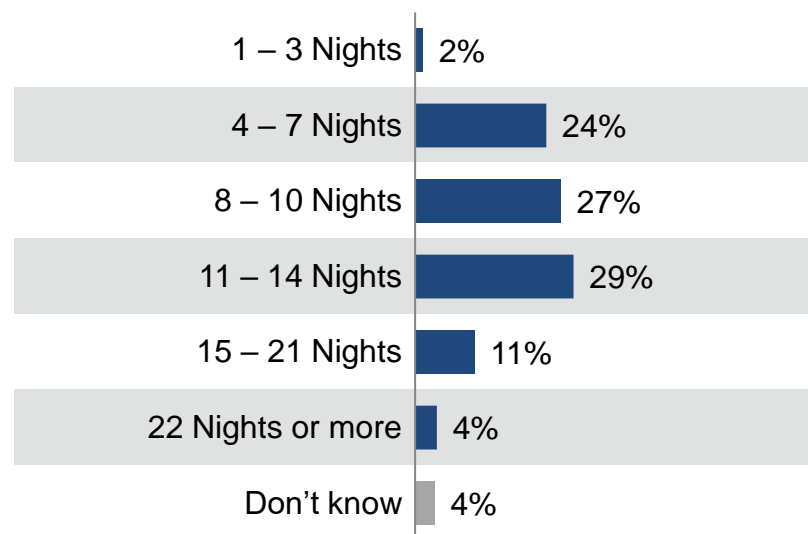
Potential travellers to Greenland: Potential time of travel, duration and preferred months



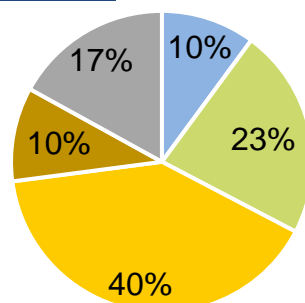
Visit (next time)



Duration



Preferred months

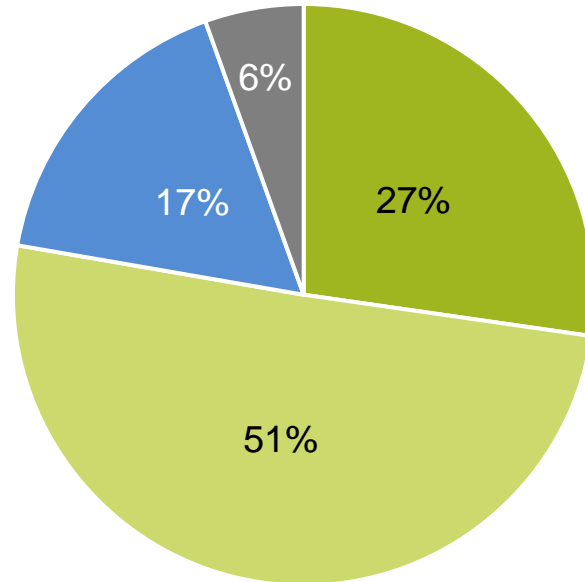


- January, February, March
- April, May, June
- July, August, September
- October, November, December
- Don't know

- » The survey also asked details about the **year** when the trip to Greenland is likely to come true: 10% of the potential travellers plan on visiting Greenland this year (2023), 21% in 2024, 24% in 2025 and 28% in 2026 or later.
- » When asked about **how much time** they would like to spend in Greenland more than half of the travellers (56%) want to spend between one and two weeks, only 26% one week or less and the rest more than two weeks.
- » When asked about the preferred **months** to travel to Greenland, most potential travellers prefer going to Greenland in the July/August/September (40%), followed by April/May/June (23%).

*When, realistically, do you think you will visit Greenland?
What would be your preferred months for a visit to Greenland?
How much time would you like to spend during your next trip to Greenland?*
Basis: Potential travellers to Greenland from Germany (n=477)
Source: Visit Greenland market study Germany 2023 by NIT

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



- » We asked the potential travellers how crucial sustainability is when planning a trip to Greenland.
- » 27% state that sustainability will be the critical deciding factor and 51% consider it one of several aspects influencing the decision for a specific offer.
- » Only a small share (17%) do not really consider sustainability and even less (6%) are not interested in this topic.

Sustainability will be **critical** when deciding for a specific offer.

Sustainability will be **one of several aspects** when deciding for a specific offer.

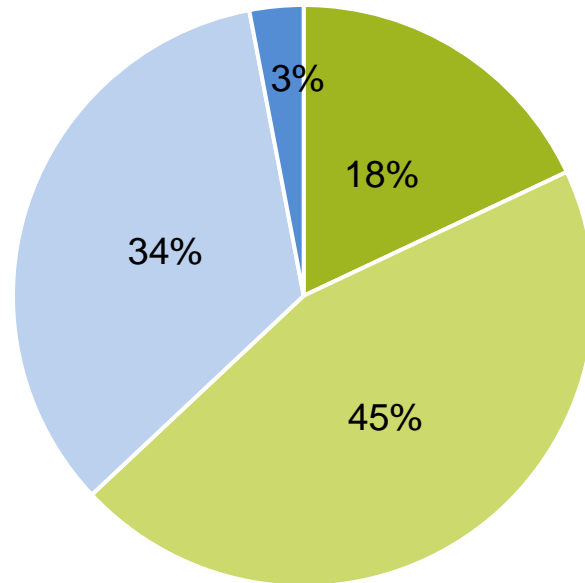
Sustainability will **not play a big role** when deciding for a specific offer.

Sustainable travel is **not something that interests me in general**.

What do you think, how important will be the issue of sustainability (regarding ecological and social responsibility) when planning a trip to Greenland?

Basis: Potential travellers to Greenland in Germany (n=477)
Source: Visit Greenland market study Germany 2023 by NIT

Potential travellers to Greenland: Price and quality preferences when travelling to GL



- » Potential travellers were also asked about the relevance of price and quality for their decision-making when travelling to Greenland.
- » The biggest group (45%) consider themselves as quality-oriented, closely followed by 34% that are more price-oriented when travelling to Greenland.
- » 18% state that the price only plays a minor role during the decision-making process because they want to make a travel dream come true.
- » Only a minority of 3% belongs to the so-called cheap-tourists that only pay attention to the low price in the decision-making process.

It will be all about making our **travel dreams come true**, money and prices will only play a very minor role for our decision making.

We will look **primarily for good quality** of services and are willing to pay an adequate price for it.

We will look **primarily for a good price**, but the quality of services also has to be right.

We will be looking **primarily for a low price**, with everything else being less important.

Regarding the factors of price and quality, what do you think will be true for you when travelling to Greenland?
Basis: Potential travellers to Greenland from Germany (n=477); Source: Visit Greenland market study Germany 2023 by NIT

To learn 3: Greenland product preferences



Experiences:

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

Activities:

- » The most sought-after activities in Greenland by potential travellers from Germany are experiencing quietness, photography, hiking and wildlife watching. Potential travellers from Germany named on average 5.9 activities as interesting to them (2016: 7.1 activities).
- » Compared to 2016 this means a slight change of the ranking. Some special nature focussed activities have become somewhat less important whereas “general” sensual experiences have stepped up in the ranking.

Getting there/around/organisation:

- » Most potential Greenland travellers in Germany would prefer direct flights into Greenland and staying at multiple locations when being in Greenland. Among the plane travellers the majority prefers travelling individually with a tour operator in Germany to organise the trip. There is a share of around 40% of the potential guests in Germany who want to visit Greenland as a cruise destination, most of them would prefer travelling with a mid sized ship (500 to 1,000 passengers).

Information sources:

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

Online content:

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

Final decisive input:

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

Potential time of travel, duration and preferred months

- » 10% of the potential travellers plan on visiting Greenland this year (2023), 21% in 2024, 24% in 2025 and 28% later than 2026. Half of the travellers would like to spend between one and two weeks, 26% less than that and the rest more. Most travellers prefer going in the summer months, followed by late spring.

Importance of price and quality

- » 45% of the potential travellers are more quality-oriented while 34% are more price-oriented when travelling to Greenland. A smaller share of 18% pays no attention to the price at all and 3% are only focused on a low price.

- » This chapter is basically the CORE of the study and was the focus of the questionnaire.
- » The results help to understand in detail how the potential travellers would like to spend their holidays in Greenland. This knowledge should give you substantial help with regard to product development, marketing strategy and communication.
- » It is even possible and smart to go deeper into different segments of potential guests; e.g. age groups (chapter 4) or with the Visit Greenland segments (chapter 5).

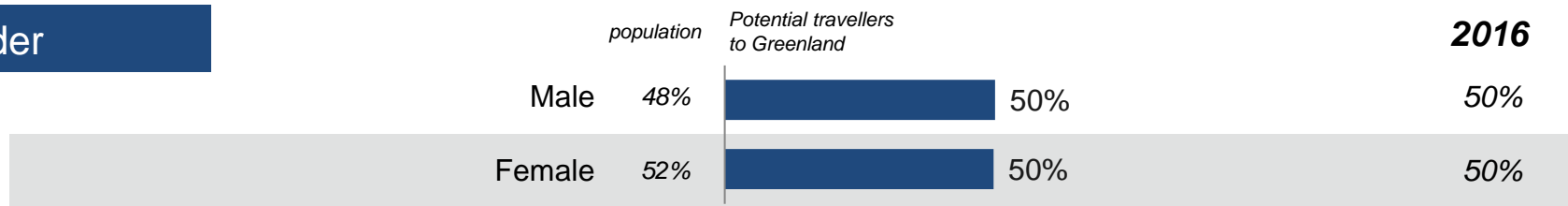
A group of people are playing soccer on a dirt field in a coastal village. In the foreground, a man in a black jacket and light-colored pants is kicking the ball, while another man in a black and red jacket is blocking him. Other people are watching or playing in the background. The buildings are blue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

4. Socio-demographic profiles of potential travellers to Greenland

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

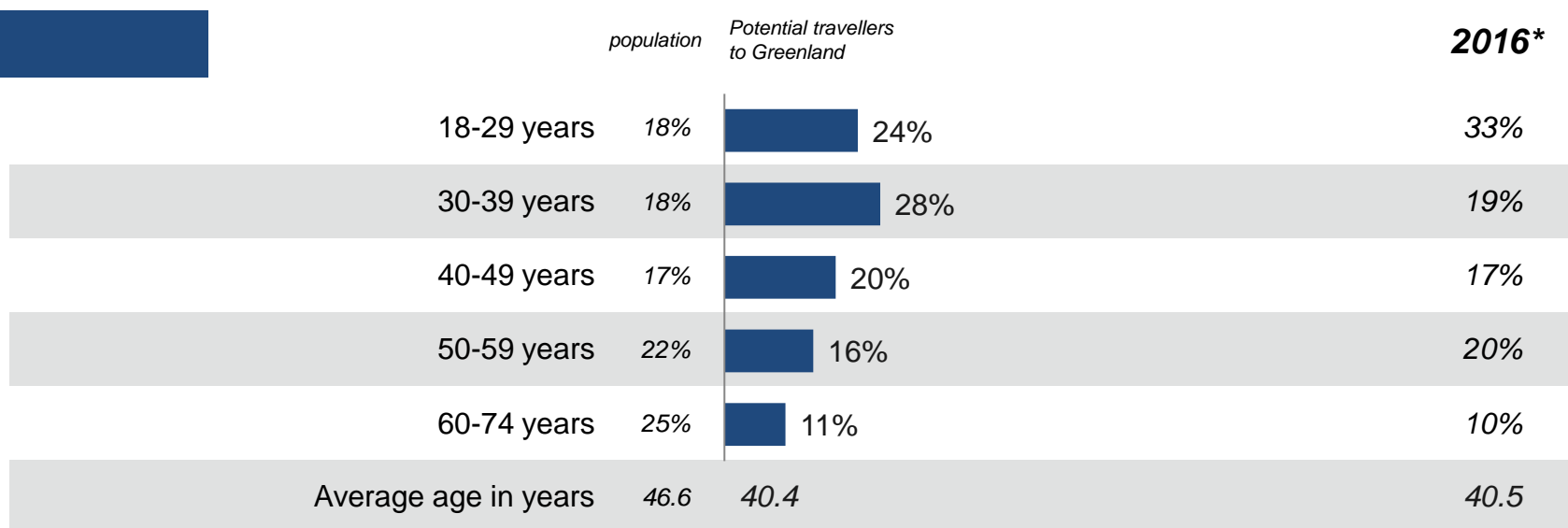


Gender



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

Age



» The **age structure** of potential Greenland travellers is dominated by younger travellers. More than half of the potential travellers is below 40 years old. The age group of 60 to 74 years old travellers is the smallest.

» The average age of potential travellers to Greenland from Germany is 40.4 years.

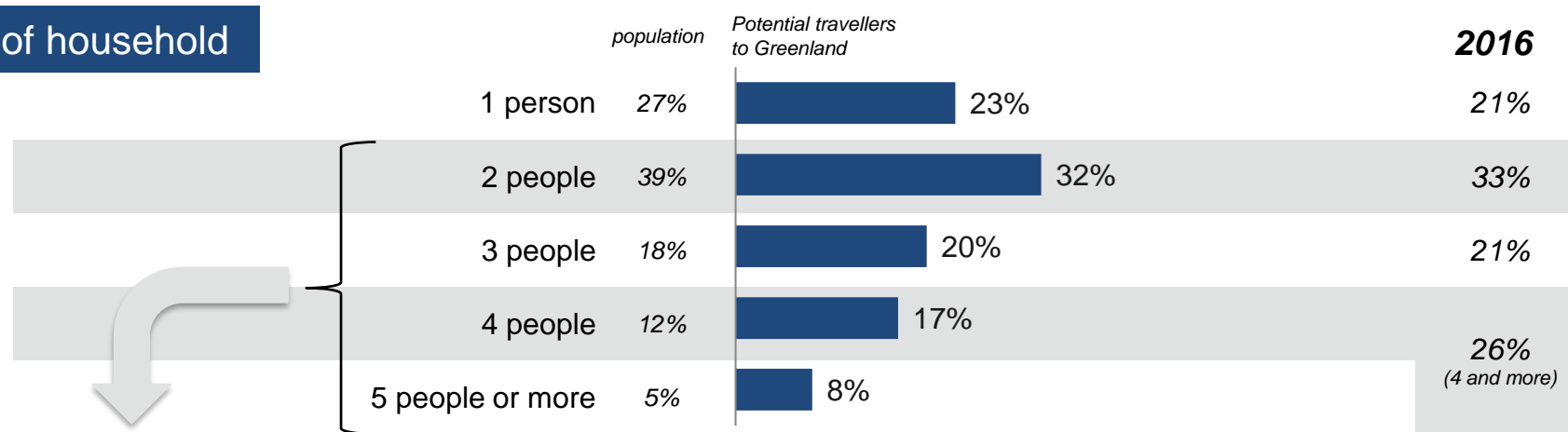
» The comparison to 2016 shows a higher share of very young people and in the group of 50-59 years. All other age groups had lower shares in 2016.

Basis: All respondents in Germany (n=3,000), potential travellers to Greenland from Germany (n=477); Source: Visit Greenland market study Germany 2023 by NIT, NATA market study Germany 2016 by NIT; *age structure from 16 to 70

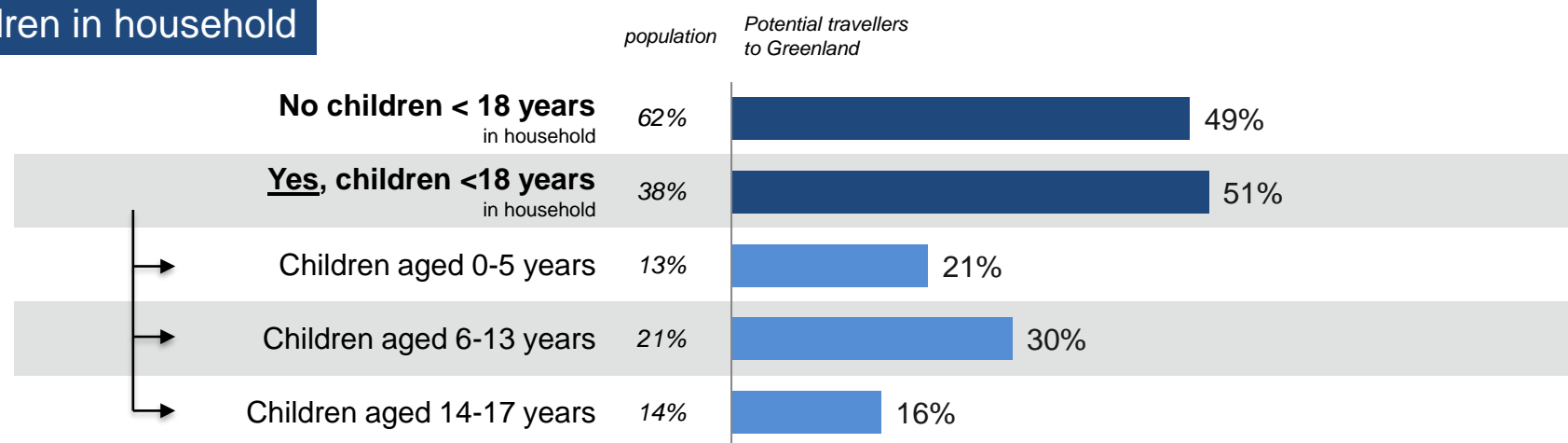
Potential travellers to Greenland: Demographics II (size of household)



Size of household



Children in household



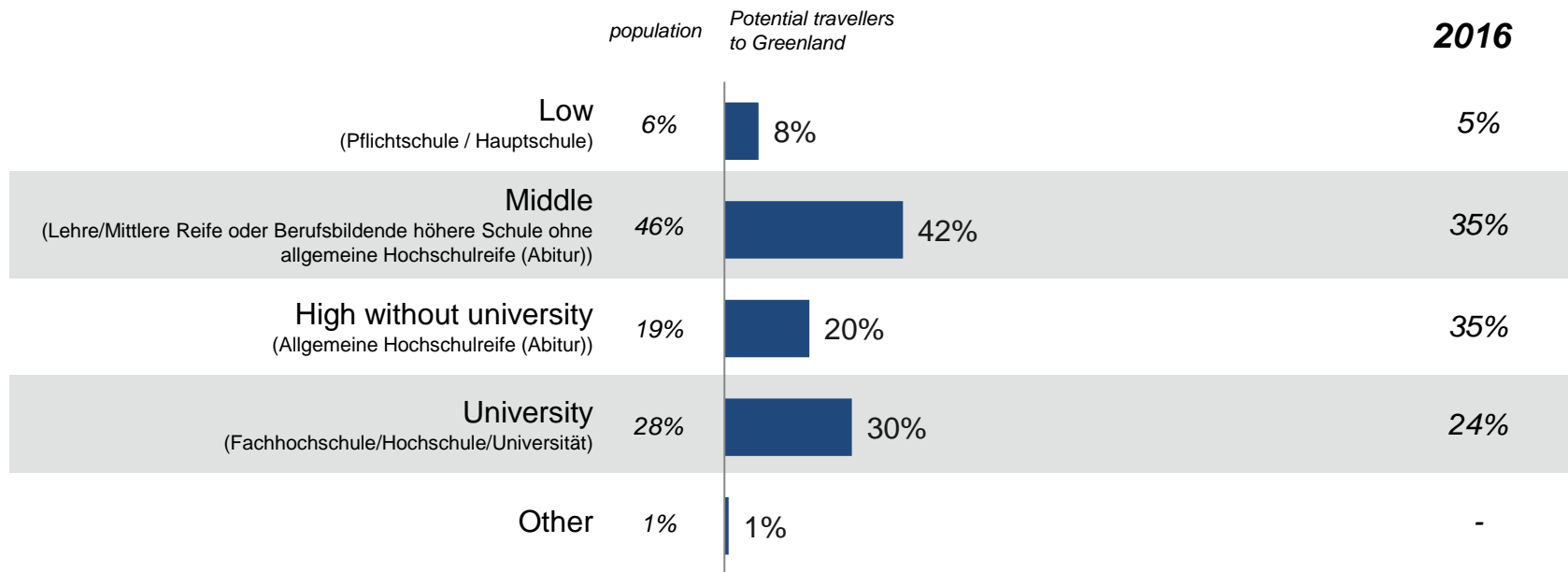
- » The biggest group of potential travellers to Greenland in Germany lives in households of two people.
- » Half of the potential travellers to Greenland from households with 2 or more people live with children in the household. This is a much higher share than in the German population. 21% of these potential traveller have children younger than 5 years in the household, 30% children aged from 6 to 13 and 16% have teenagers in the household. The share of children below 13 years is considerably higher than in the population.

Basis: All respondents in Germany (n=3,000, with 2 or more people in household n=2202), potential travellers to Greenland from Germany (n=477, with 2 or more people in household n=368); Missing % to 100: No answer
Source: Visit Greenland market study Germany 2023 by NIT, NATA market study Germany 2016 by NIT

Potential travellers to Greenland: Demographics III (education)



Education



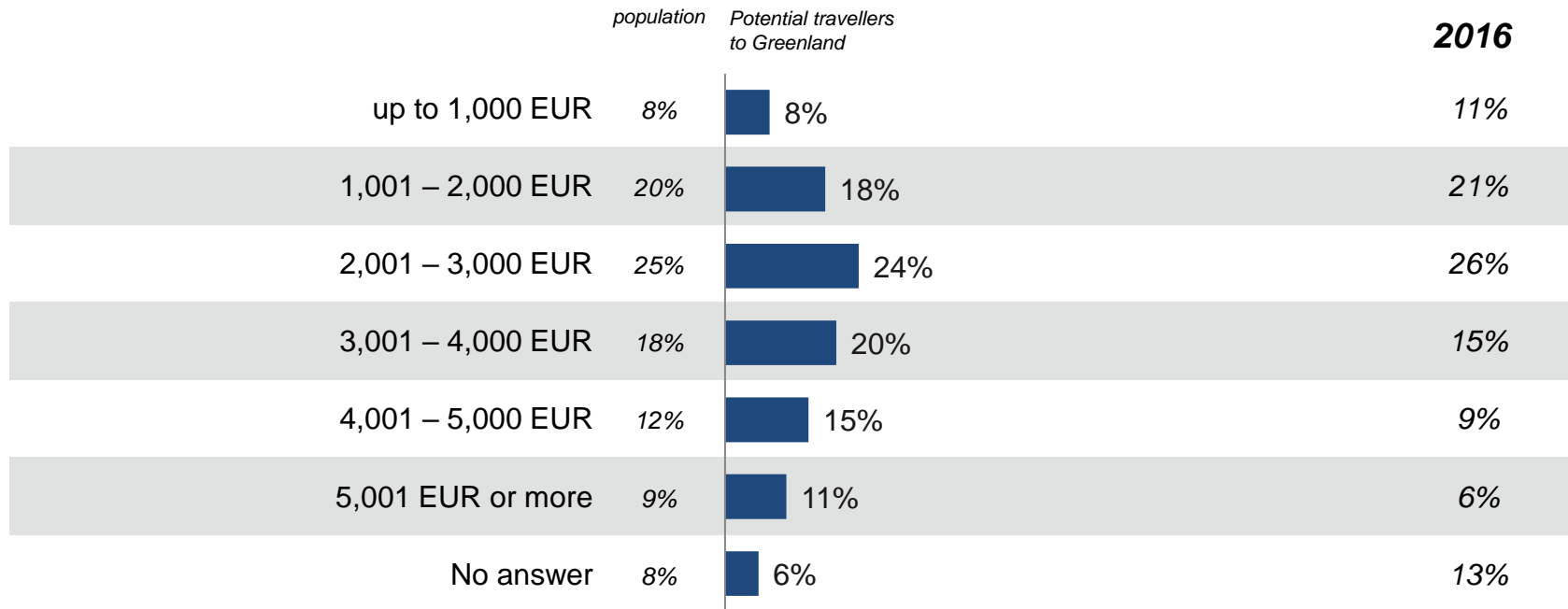
- » Regarding their formal education, we find that potential Greenland travellers in Germany have a similar education level as the average German population.
- » Half of the potential Greenland travellers from Germany have at least a high education.
- » However, the comparison of 2016 and 2023 shows that the share of high without university has decreased over the years, while the share of those with a university degree and those with a lower education increased considerably.

Basis: Total population (n=3,000) vs. potential travellers to Greenland from Germany (n=477); Source: Visit Greenland market study Germany 2023 by NIT, NATA market study Germany 2016 by NIT

Potential travellers to Greenland: Demographics IV (income)



Household net income (per month)



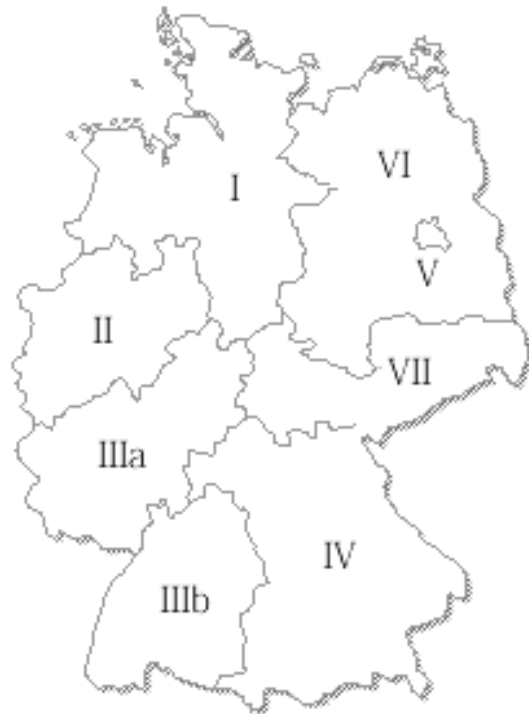
- » Looking at the average monthly net income per household, the biggest group amongst potential travellers to Greenland earns 2,001 to 3,000 EURs.
- » Yet, the share of groups with income higher than 3,001 EUR is bigger for the potential traveller than in the population.
- » In comparison to 2016, we observe a growth in the income segments of 3,001+ EUR and a decline in the segments below 2,000 EUR.

Basis: Total population (n=3,000) vs. potential travellers to Greenland from Germany (n=477); Source: Visit Greenland market study Germany 2023 by NIT, NATA market study Germany 2016 by NIT

Potential travellers to Greenland: Demographics V (regions)



Regions



	population	Potential travellers to Greenland	2016
Nielsen I	16%	16%	14%
Nielsen II	22%	23%	25%
Nielsen IIIa	14%	11%	11%
Nielsen IIIb	13%	16%	14%
Nielsen IV	15%	15%	18%
Nielsen V	4%	5%	5%
Nielsen VI	8%	7%	9%
Nielsen VII	8%	8%	6%

- » The regional spread of potential travellers to Greenland in Germany shows a slight concentration in the Western and Southern area of Germany.
- » Comparison of 2016 and 2023 shows a quite stable regional structure of the potential travellers to Greenland from Germany.

Basis: Total population (n=3,000) vs. potential travellers to Greenland from Germany (n=477);
 Source: Visit Greenland market study Germany 2023 by NIT, NATA market study Germany 2016 by NIT

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



- » Gender: Potential Greenland travellers are evenly distributed between both sexes.
 - » Age: The age structure of potential Greenland travellers is dominated by younger travellers. More than half of the potential travellers is below 40 years old. The age group of 60 to 74 years old travellers is the smallest. The average age of potential travellers to Greenland from Germany is 40.4 years.
 - » Size of household and children in household: The biggest group of potential travellers to Greenland lives in households of two people. Half of the potential travellers not living alone live with children in the household. This is a much higher share than in the general population. The share of children below 13 years is higher than in the population.
 - » Education: Regarding their formal education, we find that potential travellers in Germany have a similar education structure to the population. The comparison of 2016 and 2023 shows that the share of high education without a university degree has decreased over the years, while the share of those with a university degree and those with a lower education increased considerably.
 - » Monthly household net income: The biggest group amongst potential travellers to Greenland earns between 2,001 and 3,000 Euros. The share of groups with income above 3,001 Euros is higher than in the population. This segment has increased since 2016.
 - » Regional structure: The regional spread of potential travellers to Greenland in Germany shows a slight concentration in the Western and Southern area of Germany. Comparison of 2016 and 2023 shows a quite stable regional structure of the potential travellers to Greenland from Germany.
- » In most regards, the demographic profiles of potential Greenland travellers in Germany do not differ much from the population. This means you do not have to take peculiarities into account when addressing them.
- » On the other hand, the small but noticeable differences may show opportunities for specific targeting (e.g. overall a bit younger, higher share with children, especially younger children and a bit higher income).

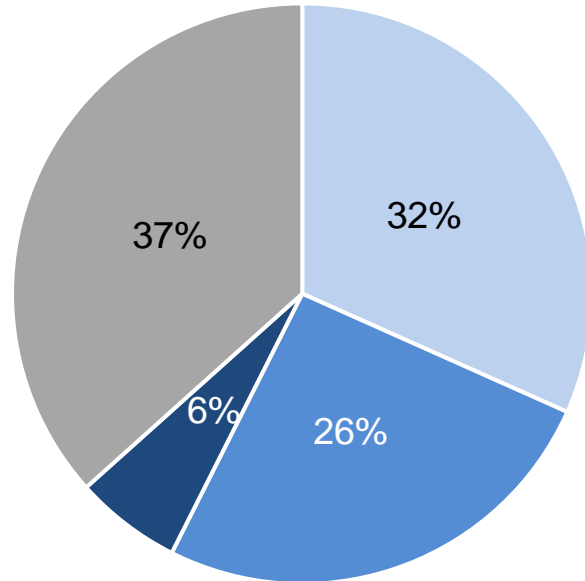
5. Segmentation of potential travellers



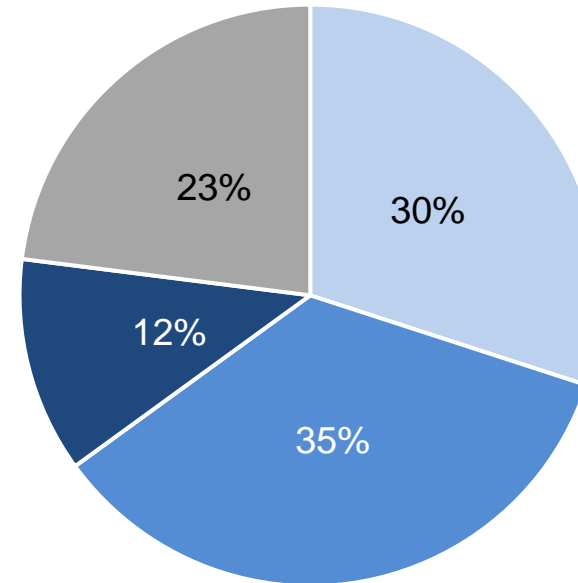
Visit Greenland adventurer segments



population



Potential travellers to Greenland



- » Visit Greenland developed a segmentation model build on different levels of “adventure”. Here you can find all about this segmentation approach: <https://traveltrade.visitgreenland.com/latest-news/new-simplified-segmentation/>
- » Looking at the results of our survey, we first see that the share of non-adventurers (those not fitting with the definitions of the segments) is higher in the population (37%) than for potential travellers.
- » With the potential travellers, 30% belong to the “soft adventurers”, 35% to the “immersive” and 12% to the “ultimate adventurers”.

<p>Soft Adventurer (comfort, a little physical exertion, and a more observant approach to local culture)</p>
<p>Immersive Adventurer (some degree of physical activity, and more engaged contact with locals and the local culture)</p>
<p>Ultimate Adventurer (a full 'deep dive' into nature and/or physical challenges, and/or 'living like a local' to have as culturally authentic experiences as possible)</p>
<p>None of the VG adventure segments</p>

If you had to identify as one of the following tourist types, which one would it be?
Basis: All respondents in Germany (n=3,000), potential travellers to Greenland from Germany (n=477); Source: Visit Greenland market study Germany 2023 by NIT

Attitude towards sustainable travelling (population vs. potential travellers)

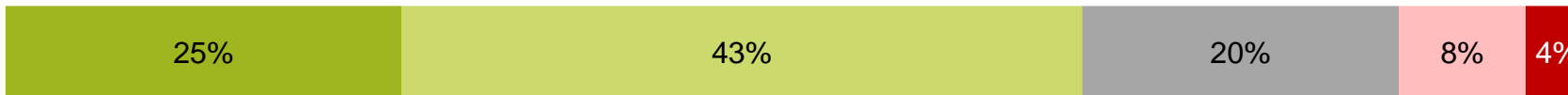


My holiday should be as **ecologically sound** as possible, be resource saving and environmentally friendly.

Population

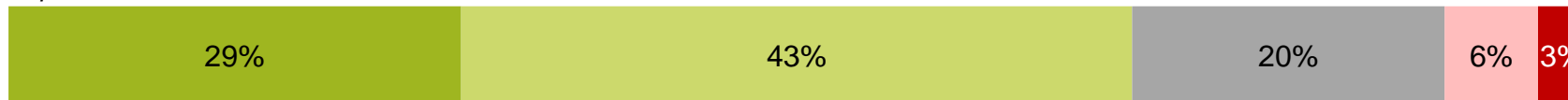


Potential travellers to Greenland



My holiday should be as **socially acceptable** as possible (i.e. fair working conditions for staff and respect for the local population).

Population



Potential travellers to Greenland



■ 5 totally agree ■ 4 ■ 3 ■ 2 ■ 1 totally disagree

- » With growing concern for sustainability it is crucial to know the attitude of potential travellers to Greenland to assess the need of adjusting products and their marketing towards a more sustainable approach.
- » Potential Greenland traveller of Germany have a more pronounced attitude towards sustainability than the German population in general.
- » More than two third of the potential travellers prefer their holiday to be ecologically sound and even 80% would like it to be socially acceptable. This share is a bit lower in the German population overall.

Below are two statements about holidays in general. Please indicate the extent to which each of these statements is relevant to you.

Basis: All respondents in Germany (n=3,000) and potential travellers to Greenland in Germany (n=477)

Source: Visit Greenland market study Germany 2023 by NIT

To learn 5: Visit Greenland segmentation of potential travellers



Visit Greenland adventure segmentation:

- » Looking at the population in Germany, there is a high share of non-adventurers (37%), this is followed by the soft adventurers (32%). One fourth of the population (26%) are immersive adventurers and only 6% consider themselves as ultimate adventurers.
- » Looking at the potential Greenland travellers in Germany, the share of non-adventurers is 23%. The Immersive Adventurers are dominating with a share of 35%, closely followed by the soft adventurers with 30%. 12% are ultimate adventurers.
- » Looking at the differences between the population and the potential travellers, you find that the potential travellers have higher shares of Immersive and ultimate adventurers, but lower shares of soft adventurers.

Attitudes towards sustainability

- » Potential Greenland traveller of Germany have a more pronounced attitude towards sustainability than the German population in general.
- » More than two third of the potential travellers prefer their holiday to be ecologically sound and even 80% would like it to be socially acceptable. This share is a bit lower in the German population overall.

» The Visit Greenland segmentation approach is on the one hand very helpful to further understand the potential Greenland travellers in Germany, on the other hand it enables us understand the size and needs of the segments to target them better.

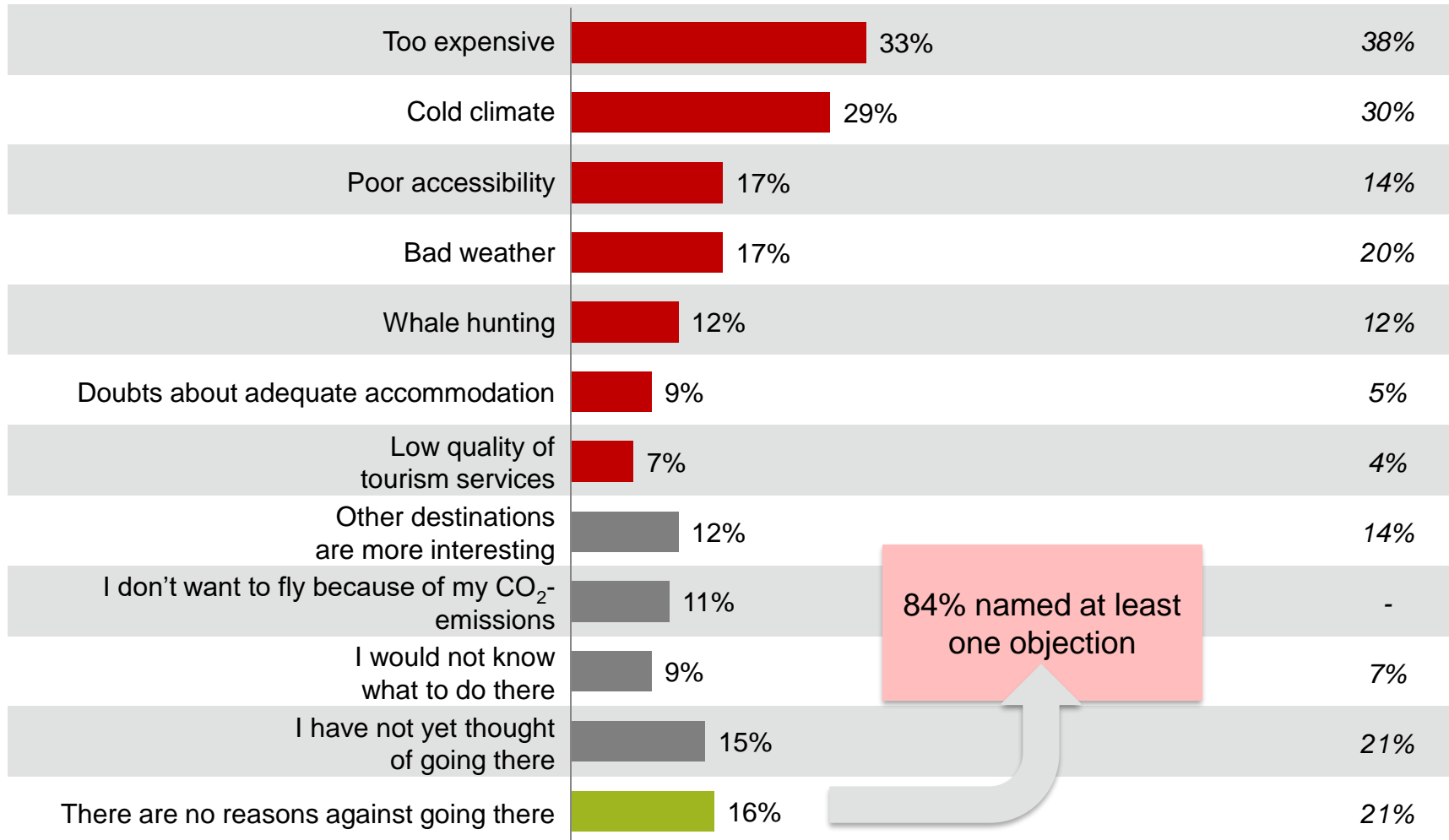


6. Reasons against/pro travelling to Greenland

Reasons against travelling to Greenland (population)



2016



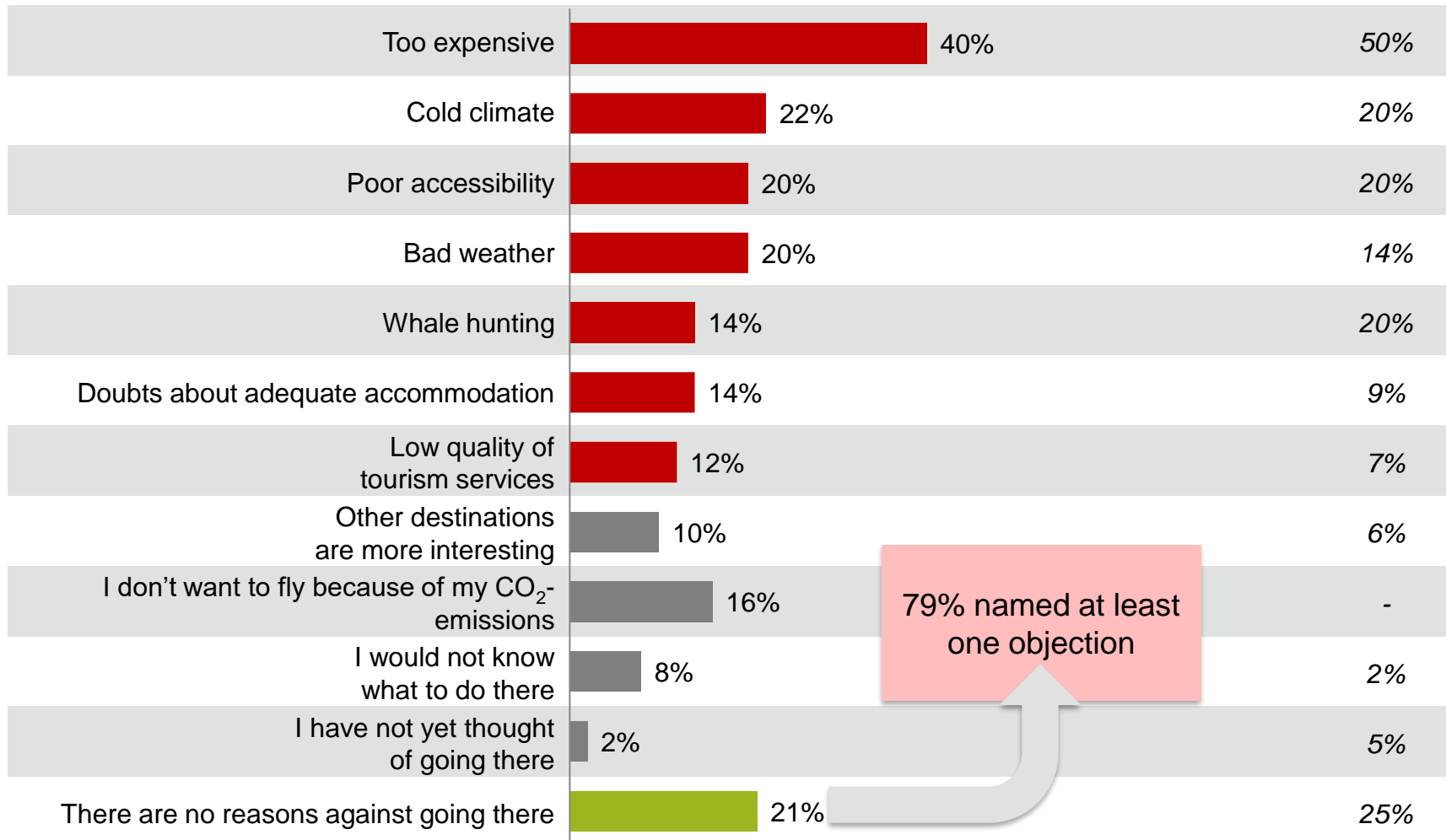
- » One of the final questions in the survey examines reasons against travelling to Greenland.
- » The good news first: 16% of the Germans have no general objections to travel to Greenland. In turn, this means that 84% of the population named at least one objection against travelling to Greenland.
- » Most important reasons against travelling to Greenland are the expected high costs, closely followed by the coldness. Poor accessibility and bad weather are also considerable reasons against travelling to Greenland for almost every fifth of the German population.
- » There are also important factors in place, that are not directly linked to the tourism offer in Greenland (marked grey).

What are in your opinion reasons against travelling to Greenland (2016: Greenland, Faroe Islands, Iceland)?
 Basis: All respondents in Germany (n=3,000)
 Source: Visit Greenland market study Germany 2023 by NIT, NATA market study Germany 2016 by NIT

Reasons against travelling to Greenland (potential travellers to Greenland)



2016



- » Even more important is to understand what stops those interested in travelling to Greenland from going there.
- » Among the potential travellers in Germany one fifth sees no reason to not travel to Greenland (21%). This indicates that even among the potential travellers to Greenland 79% have at least one objection against going there.
- » For the rest the main barrier seems to be the price. 40% of the potential travellers consider Greenland “too expensive”. This figure is much higher than in the population.
- » Three other important barriers are the cold climate, poor accessibility and bad weather.
- » However, there are more doubts about the quality of tourism services and accommodation adequateness among the potential travellers than in the general population.

What are in your opinion reasons against travelling to Greenland (2016: Greenland, Faroe Islands, Iceland)?
Basis: Potential travellers to Greenland in Germany (n=477);
Source: Visit Greenland market study Germany 2023 by NIT,
NATA market study Germany 2016 by NIT

To learn 6: Reasons against travelling to Greenland



Population:

- » 16% of the Germans have no general objections to travel to Greenland. Most important reasons against travelling to Greenland are the expected high costs, closely followed by the coldness. Poor accessibility and bad weather are also considerable reasons against travelling to Greenland for almost every fifth of the German population. There are also important factors in place, that are not directly linked to the tourism offer in Greenland.

Potential guests:

- » Among the potential travellers in Germany one fifth sees no reason to not travel to Greenland (21%). For the rest the main barrier seems to be the price. 40% of the potential travellers consider Greenland “too expensive”. This figure is much higher than in the population. Three other important barriers are the cold climate, poor accessibility and bad weather.
- » However, there are more doubts about the quality of tourism services and accommodation adequateness among the potential travellers than in the general population.

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

7. Summary and main conclusions (all markets)



Summary & main conclusions: SIMILARITIES of markets



Status 2023:

» **Greenland is on the map in all the markets**

Consumers in all markets are aware of Greenland as a travel destination. They know what to expect there and a small share of the population is interested to travel there.

» **High interest – fierce competition**

Compared to actual travellers, there is a huge interest to travel to Greenland. On the other hand there is a fierce competition with other remote destinations, above all with ICELAND → Here lies also an opportunity, as many potential travellers to Greenland are interested in combining Greenland and Iceland in one trip.

» **Image and experiences in Greenland**

Potential travellers are imagining unspoilt nature, quietness and a not touristic place – and they want to experience the scenery, natural phenomena and wildlife → You can see that Greenland's main assets are quite fragile, potentially quickly endangered by too many tourists at the same time

» **Travel planning**

Online and offline sources are being used for inspiration – for travelling some prefer individual, some prefer the help of a tour operator and like to travel in a group. Generally, the “right product for the right price” is what most people need to make the final decision for Greenland → Need for an appropriate multi-channel marketing mix, working b2b and b2c. Worthwhile to look for the characteristics of the different markets.

Trends since 2016/2017/2018:

» **Interest for Greenland has increased a lot**

In all markets the interest to travel to Greenland (and to most other remote destinations) has increased – in some markets quite dramatically (e.g. DE, UK, US). *Two methodological observations regarding this trend in DE, UK, US: These are the markets with the “oldest” baseline surveys (2016) and the set of destinations in the 2016 version was very different from the 2023 edition.*

» **Nature still dominates, but culture is becoming more important**

Some results of the desired experiences and activities are somewhat lower than before – most prominently in the markets with the highest growth of the interest for Greenland. Interestingly, there seem to be bigger drops in nature-focussed experiences than in culture-focussed experience – so nature is still dominating but to a lesser extend than before. This is also true for the activities: Again, nature-focussed activities (most notably guided nature excursion) see a bigger decrease than culture-focussed activities. Niche activities regarding physical exercise (e.g. kayaking, fishing, skiing) appear to be most stable.

» **Information sources – more online but need to look carefully**

Regarding preferred information sources that potential travellers would like to look at for planning their trip to Greenland, we can observe in general increases for the online sources and decreases for the offline sources in all the markets. There are some exceptions, though: Online, there is a quite steep decline for internet search engines and a slight decrease for destination websites. Offline, travel agents and personal relations are very stable or even slightly increasing in some markets.

Summary & main conclusions: DIFFERENCES of markets



- » Quite big market by volume and share.
- » Top-3 activities: experiencing quietness, photography and hiking.
- » Information sources: Guide books, OTAs, travel agents and tour operators are more important than in other markets.
- » Preference for July/August/September; staying 8-14 nights



- » Smallest market by volume and share
- » Top-3 activities: dog-sledding, experiencing quietness and wildlife watching
- » Information sources: Guide books, destination websites, travel agents and tour operators are more important than in other markets.
- » Preference for January-June; staying 8-14 nights
- » Big share of “travel dream make true”



- » Quite big market by volume and share (but not so much by actual arrivals, yet).
- » Top-3 activities: wildlife watching, culinary and nature excursions
- » Information sources: Destination websites, travel review sites and OTAs are more important than in other markets.
- » Preference for April-Sept; staying 4-7 nights
- » Biggest share of “immersive adventurer”



- » Quite small by volume but quite big by share.
- » Top-3 activities: wildlife watching, hiking and nature excursions.
- » Information sources: Destination websites, travel review sites, Social Media and personal relations are more important than in other markets.
- » Preference for April-Sept; staying 4-10 nights
- » Big share of “good price”
- » Biggest share of “soft adventurer”



- » Biggest market by volume and share; *but careful: tends to be over-enthusiastic compared to European markets*
- » Top-3 activities: wildlife watching, culinary and photography.
- » Information sources: Destination websites, travel review sites, Social Media and OTAs are more important than in other markets.
- » Preference for April-Sept; staying 4-10 nights
- » Biggest share of “travel dream make true”
- » Biggest share of “extreme adventurer”

Altogether, these conclusions show that there are a lot of similarities between the five markets. Nevertheless, all markets have their peculiarities and it is very worthwhile to look at them individually!



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