

Positioning and potentials of Greenland on the North American holiday travel market

Full report



April 2023
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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 NORTH AMERICAN market.**
- » The results are based on 3,500 online interviews that were conducted in North America (3,000 in the USA and 500 in Canada) by our partner Dynata in January 2023. The results are representative for the passport holders aged 18-75 years in both countries.

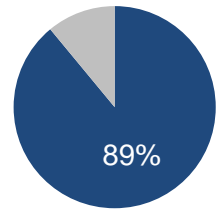




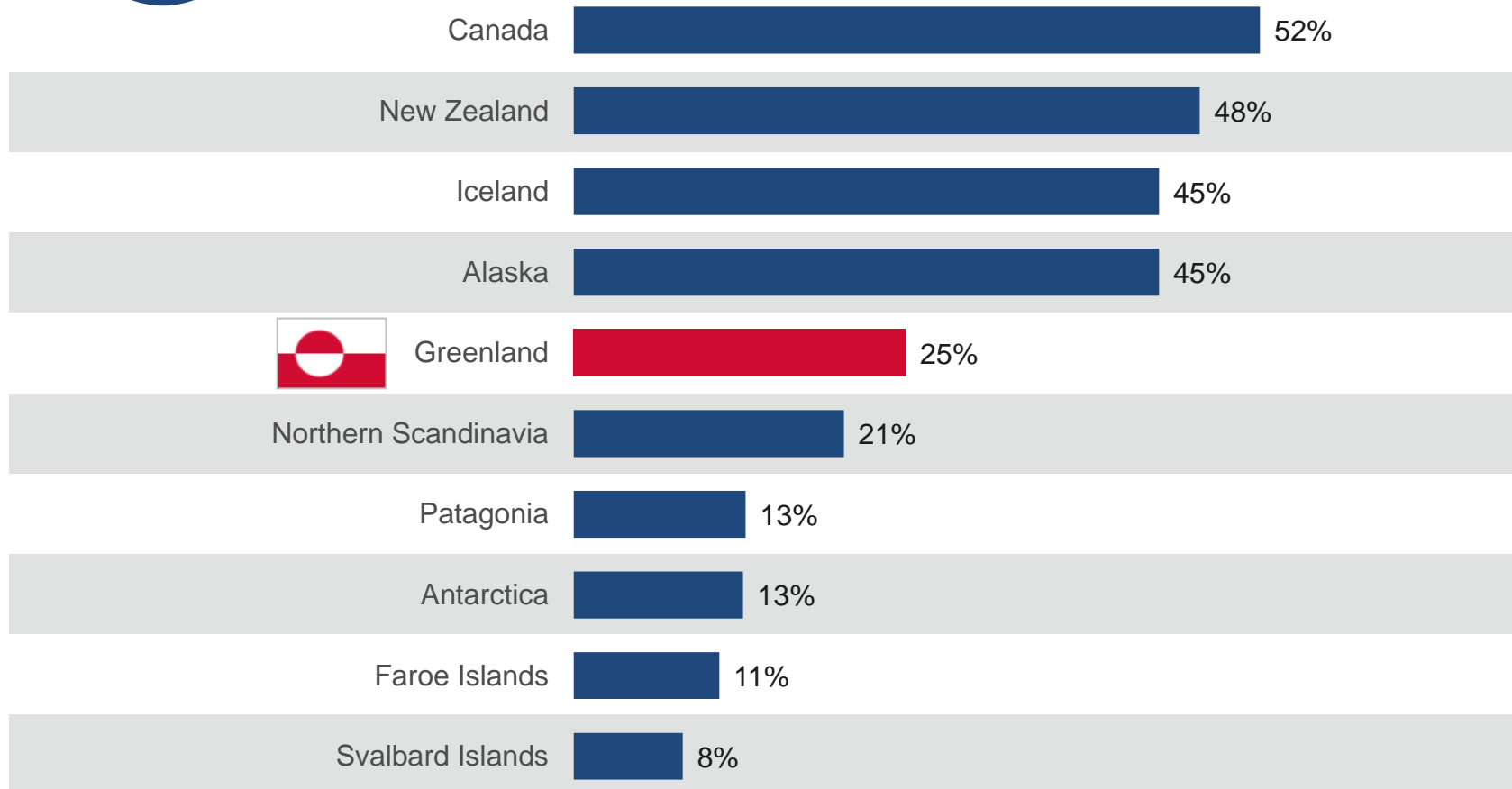
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General interest to travel to remote destinations in the North American population



89% of the North American population would like to go to at least one of these 10 remote destinations in the next 5 years

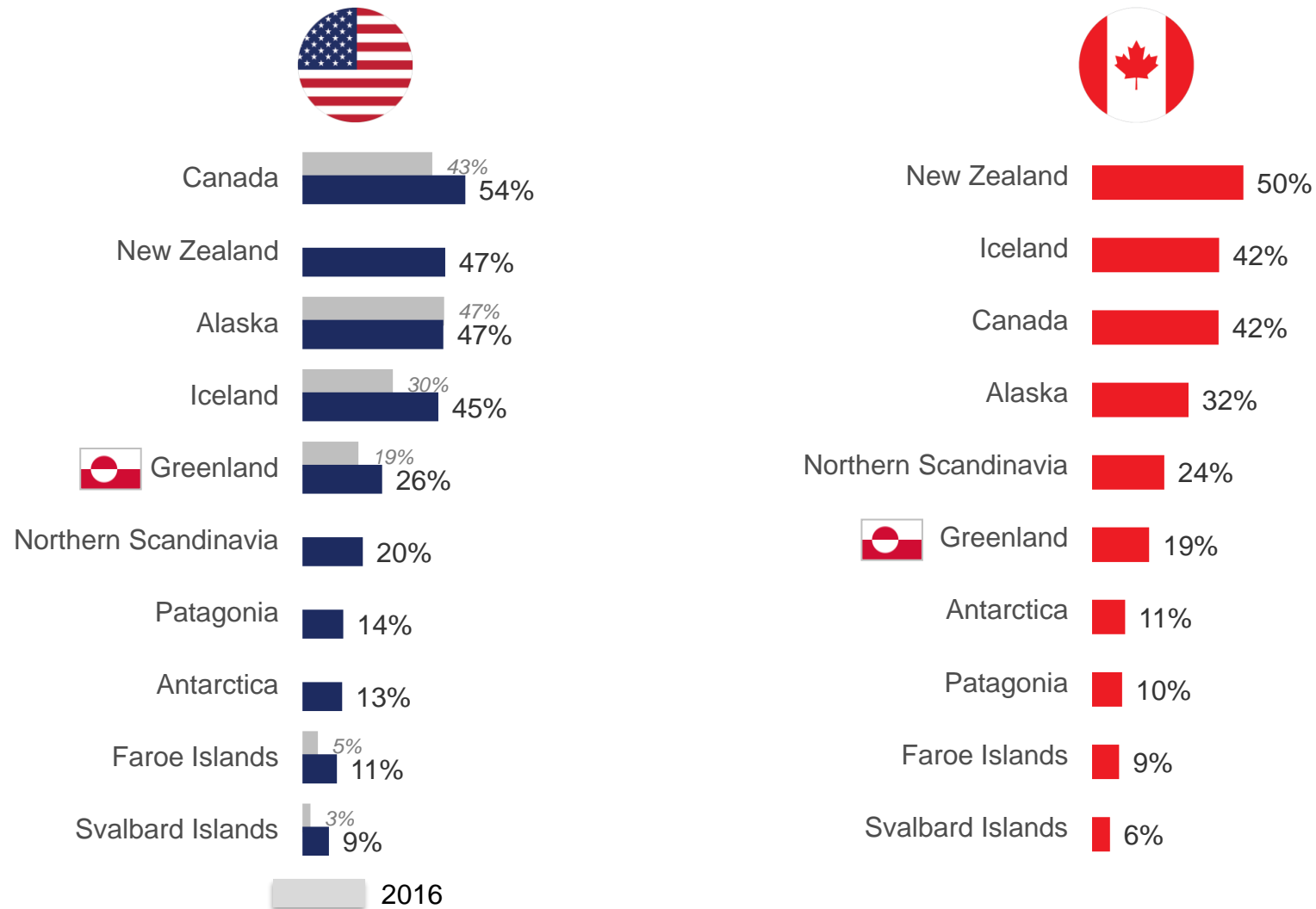


- » To identify the “general” potential of Greenland and competitive remote destinations, we asked “Which of these destinations would you like to visit within the next 5 years?”
- » 89% of the North American population would like to go to at least one of these 10 remote destinations in the next 5 years.
- » Canada is the most popular destination in terms of general interest, New Zealand, Iceland and Alaska follow.
- » 25% would like to go to Greenland.

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

Basis: All respondents in North America (n=3,500)
Source: Visit Greenland market study North America 2023 by NIT

General interest to travel to remote destinations in the USA and Canada



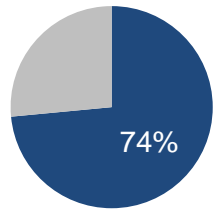
- » With small differences in the ranking Canada and New Zealand are the most popular destinations in both countries, followed by Alaska and Iceland.
- » The share of people interested to travel to Greenland is clearly higher in the USA than in Canada.
- » In the Canadian market, interest in all regions surveyed except Northern Scandinavia is lower than in the US market.
- » US market: Compared to 2016 interest to travel to remote destinations outside the USA increased. The general interest to travel to Greenland grew by 7 %-pts. *Note: The set of competitors in 2016 has been somewhat different from the 2023 study. This might have an affect on the data.*

Now we are talking about remote travel destinations. Which of these destinations would you like to visit within the next 5 years?

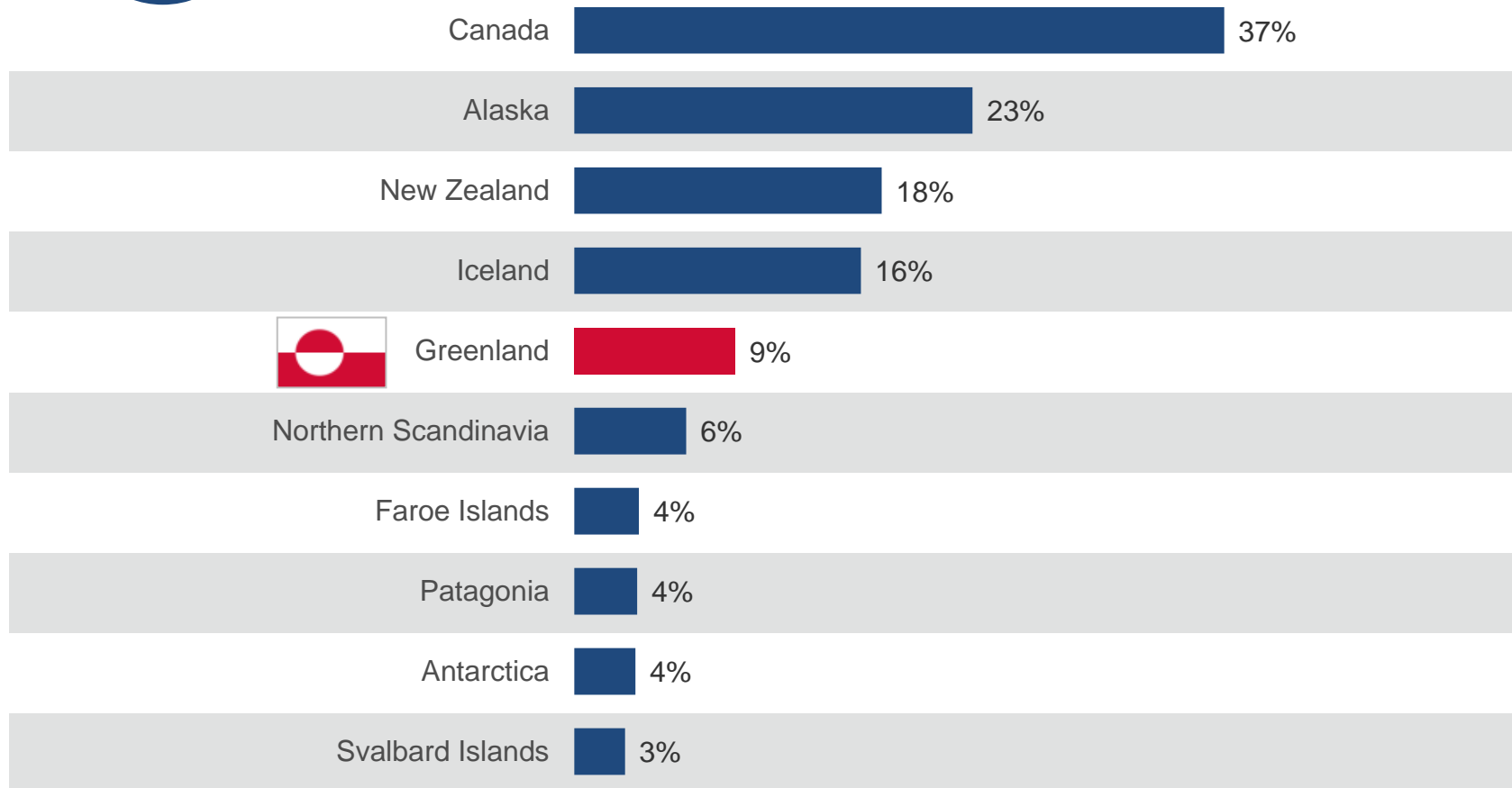
Basis: All respondents in the USA (n=3,000), and Canada (n=500);

Source: Visit Greenland market study North America 2023 by NIT, Visit Greenland market study USA 2016 by NIT

“Hard potential” to travel to remote destinations in the North American population



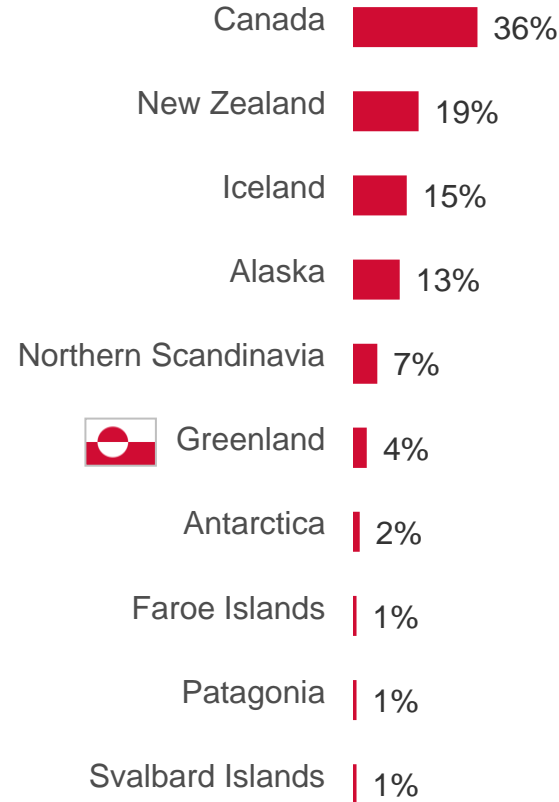
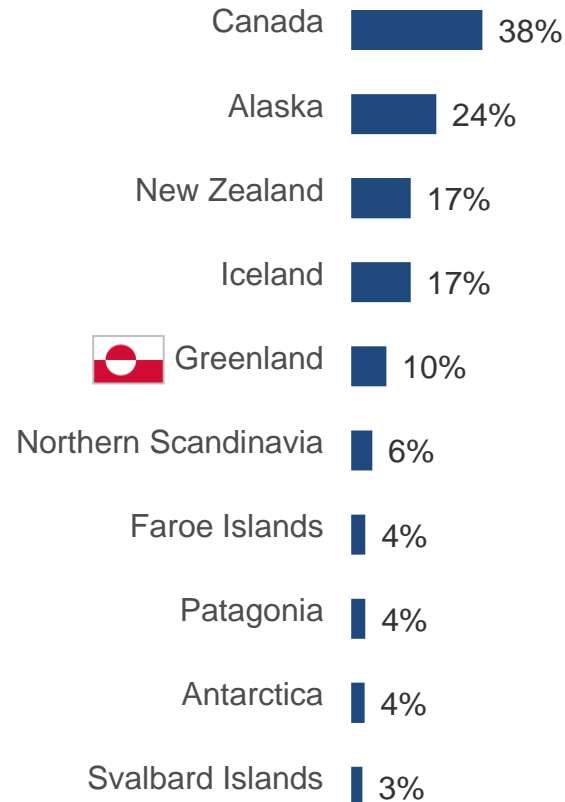
74% of the North American population are almost definitely planning to visit at least one of these 10 remote destinations within the next 2 years



- » 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?”
- » 74% of the North American population are almost definitely planning to visit at least one of these 10 remote destinations within the next 2 years.
- » Canada is the most popular destination in terms of this “hard potential”, Alaska and New Zealand follow with distance.
- » 9% 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 North America (n=3,500)
 Source: Visit Greenland market study North America 2023 by NIT

“Hard potential” to travel to remote destinations in the USA and Canada




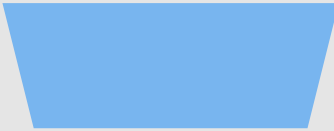





- » Canada, Alaska and New Zealand are also at the top of the US population rankings for hard potential.
- » However, interest in Iceland is on par with New Zealand.
- » One in 10 US residents is fairly certain to plan a trip to Greenland in the next 2 years.
- » In comparison, the Canadian population is slightly more interested in travelling to New Zealand or Scandinavia.
- » A trip to Greenland is only a fairly definite possibility for every 25th respondent in the next 2 years.

And which of these travel destinations are you almost definitely planning to visit within the next 2 years?
 Basis: All respondents in the USA (n=3,000), and Canada (n=500);
 Source: Visit Greenland market study North America 2023 by NIT

Volume extrapolations of actual and potential travellers to Greenland in North America




FUNNEL	Definition			
total 	Passport holders, 18-75 years old	116.5 million	100.2 million	16.3 million
total potential 	"like to travel to Greenland within the next 5 years"	29.5 million	26.5 million	3.0 million
'hard' potential/planners 	"almost definitely planning to visit Greenland within the next 2 years"	10.8 million	10.1 million	0.7 million
visitors 	Plane and cruise passengers to Greenland in 2019	21,961 plane: 5,737 cruise: 16,224	16,924 plane: 3,689 cruise: 13,924	4,601 plane: 1,612 cruise: 2,989

- » The volume funnel puts the reported market shares in relation to the actual market size and delivers concrete volume figures.
- » The hard potential and the actual visitors provide with you a baseline to estimate what future volumes of guests to expect from each of the markets.

Basis: All respondents in North America (n=3,500), USA (n=3,000), Canada (n=500)
Source: Visit Greenland market study North America 2023 by NIT

Competition in NORTH AMERICA: Which other destinations are interesting for potential GL travellers?



 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%	37%
Iceland	68%	29%
New Zealand	67%	29%
Canada	60%	44%
Alaska	58%	33%
Northern Scandinavia	37%	14%
Antarctica	27%	7%
Faroe Islands	26%	9%
Patagonia	26%	9%
Svalbard Islands	20%	7%

- » In North America, potential travellers to Greenland are also interested in 3,9 other remote destinations in our question set.
- » The fiercest competitor are Iceland and New Zealand. 68%/67% of the potential Greenland travellers also want to go there.
- » It is followed by Canada and Alaska.
- » 37% of the total potential Greenland travellers are almost definitely planning to visit Greenland in the next 2 years. Even more, 44%, are almost definitely planning to visit Canada in the next 2 years.
- » Other destinations where potential Greenland travellers are almost definitely planning to visit in the next 2 years are Alaska, Iceland and New Zealand.

Basis: Potential travellers to Greenland in North America (n=886)
Source: Visit Greenland market study North America 2023 by NIT

To learn 1: Interest to travel to Greenland & competitors



Interest to travel to remote destinations

- » 89% of the North American population would like to go to at least one of these 10 remote destinations in the next 5 years. 74% are almost definitely planning to go to at least one of these destinations in the next 2 years.
- » Canada is the most popular destination in terms of general interest, New Zealand, Iceland and Alaska follow.
- » Canada, Alaska and New Zealand are also the most popular destinations in terms of the “hard potential”.
- » 25% of the North Americans would like to go to Greenland and 9% are almost definitely planning to go there.
- » In terms of both general interest and hard potential, the US population is much more interested into travelling to Greenland than the Canadian population.
- » USA: Compared to 2016 the “general” potential of 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 North America

- » A look at the competitive situation of Greenland shows that in North America, potential travellers to Greenland are also interested in 3.9 other remote destinations in our question set.
- » The fiercest competitor are Iceland and New Zealand. 68%/67% of the potential Greenland travellers also want to go there. It is followed by Canada 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 Canada and to a lesser extent in Alaska before they actually travel to Greenland.

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

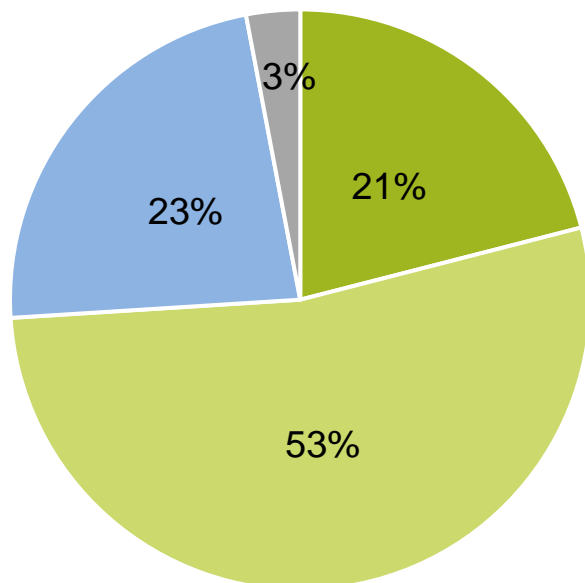


2. Image of Greenland as a holiday destination

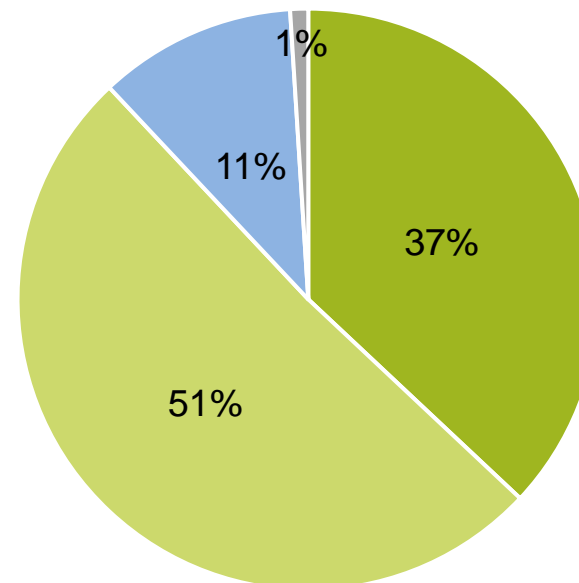
Knowledge of Greenland in the North American population vs. potential travellers to Greenland



population



Potential travellers to Greenland



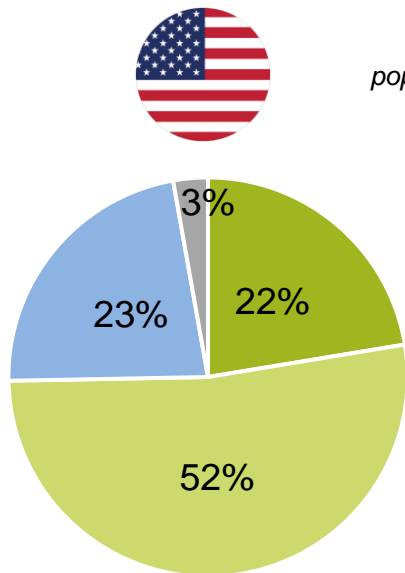
- » Those North Americans who have not been to Greenland before were asked about their knowledge of Greenland as a travel destination.
- » 21% claim to have heard or read a lot about Greenland and can therefore be considered as having high knowledge about the country.
- » More than half (53%) have only a vague idea of Greenland and almost a quarter (23%) 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 nearly doubles compared to the general population.



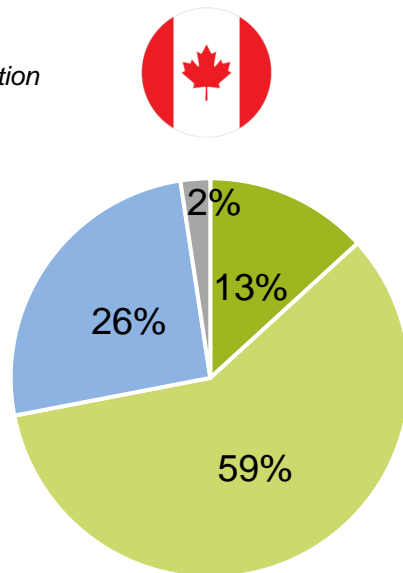
I have heard/read a lot about Greenland.
I only have a vague idea about Greenland.
I know Greenland in name only, and have no idea what it is like.
I have never heard of Greenland.

How well do you know Greenland as a travel destination?
 Basis: Respondents, in North America who have not been previously in Greenland (population: n=3238; potential travellers: n=721)
 Source: Visit Greenland market study North America 2023 by NIT

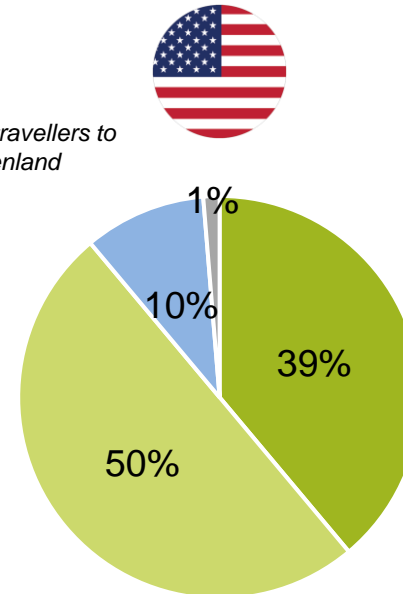
Knowledge of Greenland in the US and Canadian population vs. potential travellers to Greenland



population



Potential travellers to Greenland



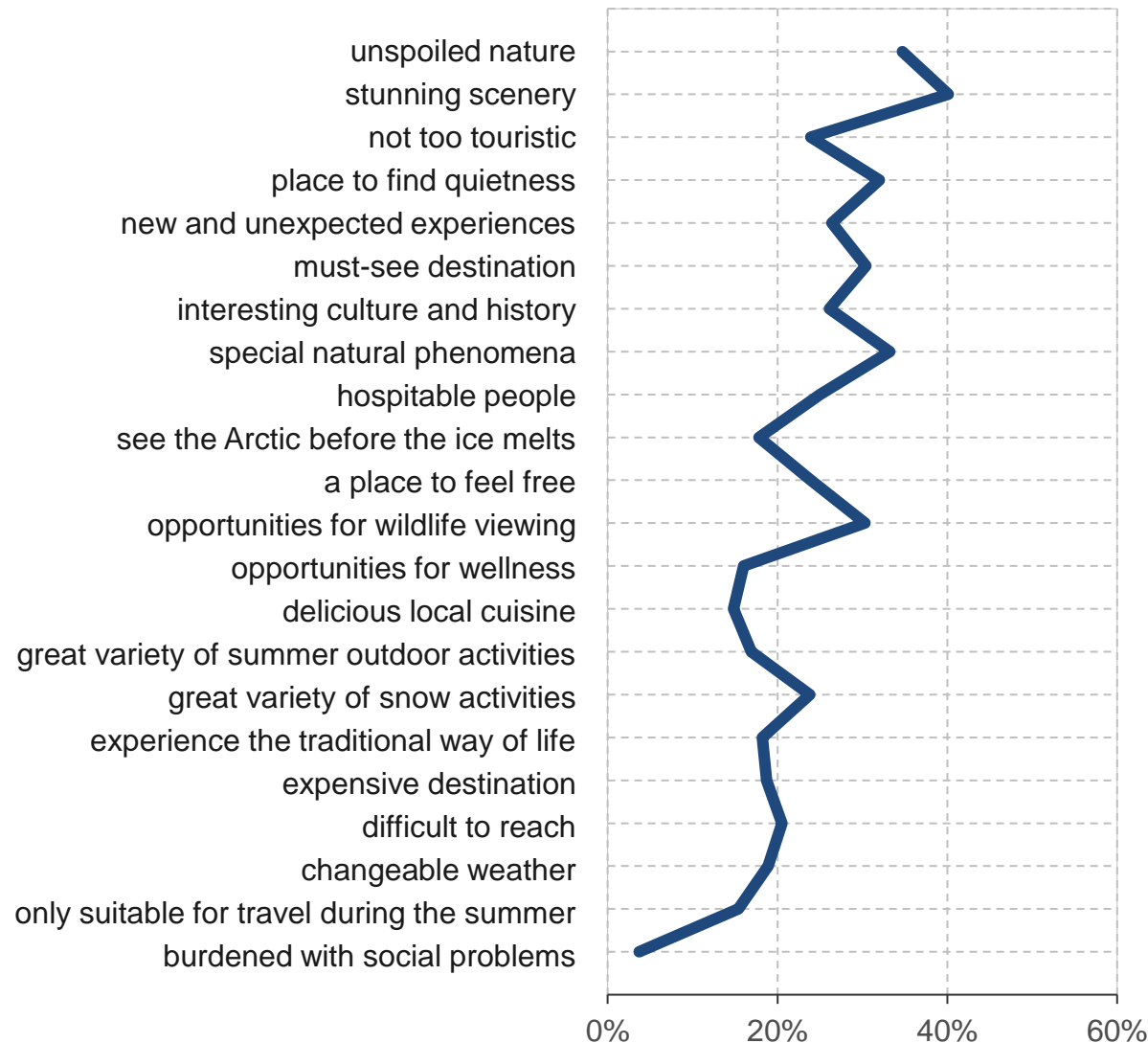
- » In the Canadian population, the proportion who have heard a lot about Greenland is significantly lower than in the US population, but the proportion who have a rough idea of the country is somewhat higher.
- » Overall, the proportion of people who only know Greenland by name or have never heard of the destination is similar in both countries.
- » Among those interested in Greenland in the US population, more than one in three has a great deal of knowledge about Greenland as a destination.
- » In addition, 50% of the US population has a rough idea of Greenland. Only one in 10 knows Greenland by name only.
- » Due to the small numbers of interviews in Canada, we cannot look in detail at the potential travellers to Greenland in Canada.



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 North America who have not been previously in Greenland (population: USA: n=2746, Canada: n=492; potential travellers: USA: n=632)
 Source: Visit Greenland market study North America 2023 by NIT

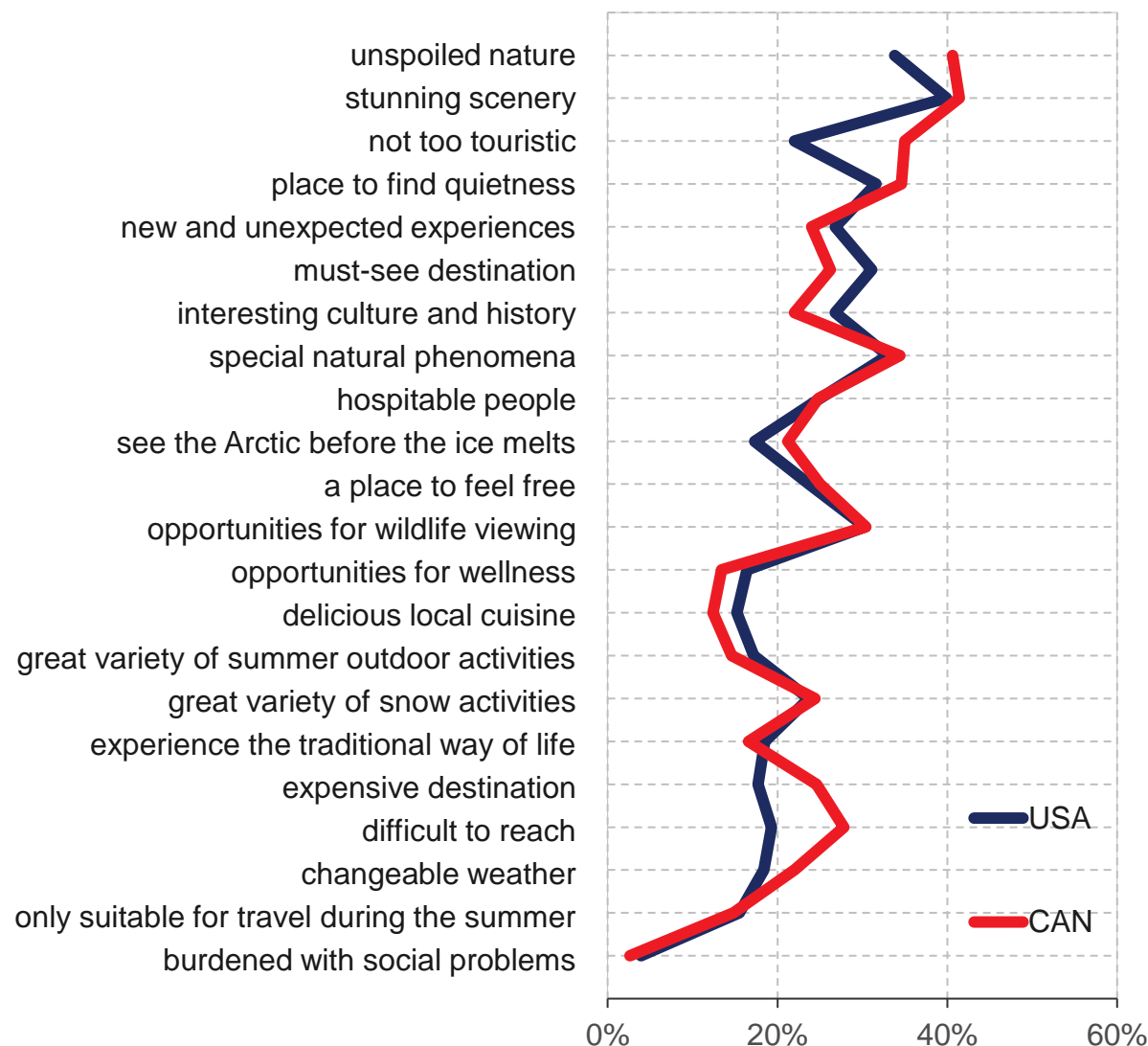
Image of Greenland in the North American population



- » The **key image factors** of Greenland in the North American population are:
 - » Stunning scenery (40%)
 - » Unspoiled nature (35%)
 - » Natural phenomena (33%)
 - » A place to find quietness(32%)
 - » Opportunities for wildlife viewing (30%)
- » Greenland is **not famous** for:
 - » Opportunities for wellness (16%)
 - » Only suitable for travelling in the summer (15%)
 - » Delicious local cuisine (15%)
 - » Social problems (4%)
- » Persons in North America name on average 4.7 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 North America (n=3,500)
 Source: Visit Greenland market study North America 2023 by NIT

Image of Greenland in the US and Canadian population:

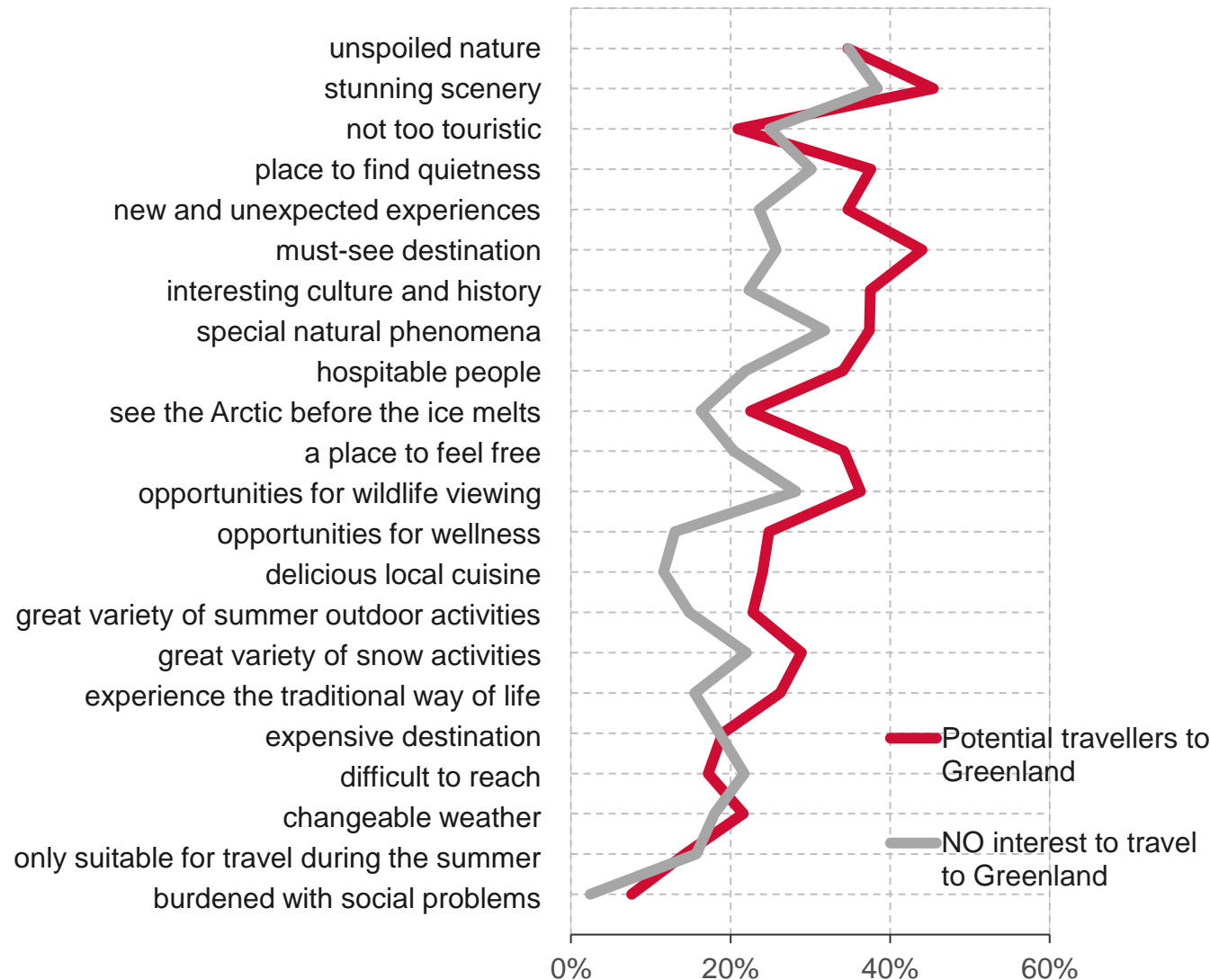


- » The **most striking differences** of the US and Canadian population are (USA vs. CAN):
 - » Not too touristic (-13%-pts.)
 - » Difficult to reach (-9%-pts.)
 - » Expensive destination (-7%-pts.)
 - » Unspoiled nature (-6%-pts.)
 - » Must see destination (+5%-pts.)
 - » Interesting culture and history (+5%-pts.)

- » Persons in the US population name on average 5.1 of the 21 characteristics in the question. Persons in the Canadian population name 5.3 characteristics.

Please tell me which of these characteristics do you think particularly apply to Greenland?
 Basis: All respondents in the USA (n=3,000) all respondents in Canada (n=500)
 Source: Visit Greenland market study North America 2023 by NIT

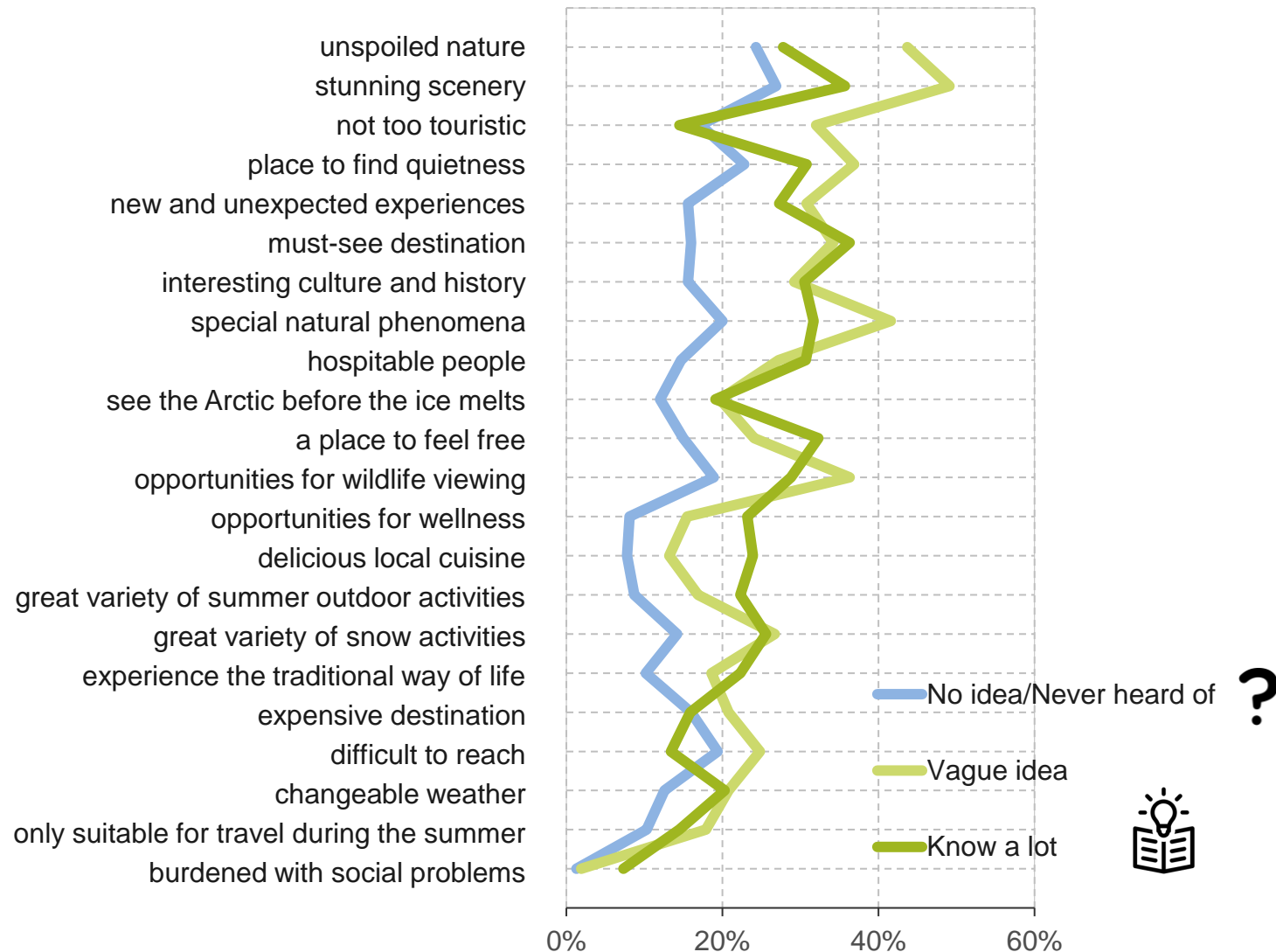
Image of Greenland in North America: With/without interest to travel to Greenland



- » 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.)
 - » Interesting culture/history (+15%-pts.)
 - » A place to feel free (+14%-pts.)
 - » Hospitable people (+12%-pts.)
 - » Opportunities for wellness (+12%-pts.)
 - » Delicious local cuisine (+12%-pts.)
- » Characteristic, where persons with NO interest show higher figures
 - » Difficult to reach (-5%-pts.)
 - » Not too touristic (-4%-pts.)
- » Persons WITH interest to travel to Greenland name 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 North America WITH interest to travel to Greenland (n=886) and WITHOUT interest to travel to Greenland (n=2,614)
 Source: Visit Greenland market study North America 2023 by NIT

Image of Greenland in North America: Depending on the knowledge of Greenland

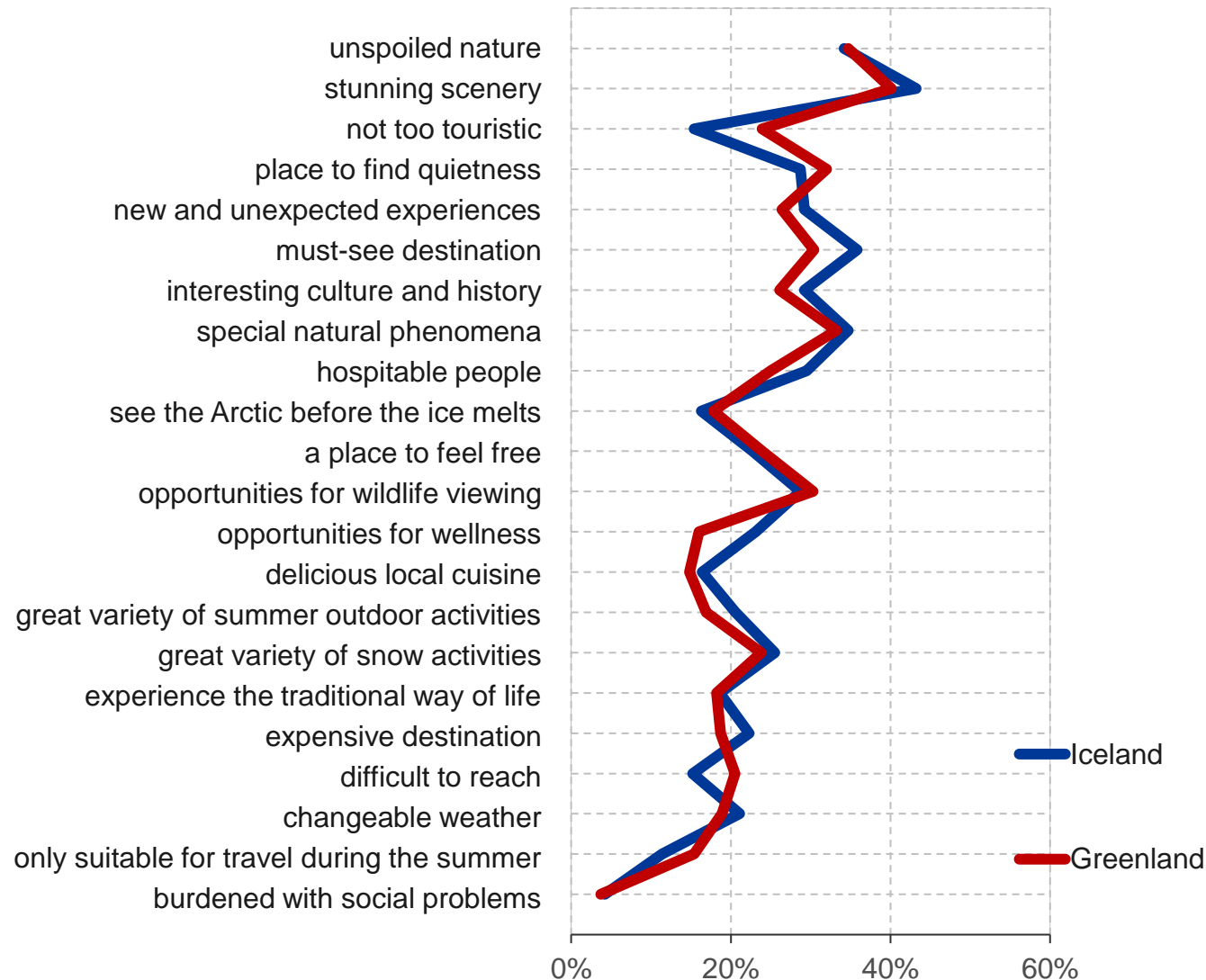


- » Higher knowledge leads to higher image figures of many topics such as (comparison “know a lot” vs. “no idea”):
 - » Must-see destination (+20%-pts.)
 - » Place to feel free (+17%-pts.)
 - » Hospitable people (+16%-pts.)
 - » Delicious local cuisine (+16%-pts.)
 - » Interesting culture and history (+15%-pts.)
 - » Opportunities for wellness (+15%-pts.)
- » The groups are closer to each other regarding aspects such as Greenland being an expensive destination, hard to reach, with changeable weather, unspoiled nature, suitable for summer and having social problems.
- » Persons WITH knowledge name on average 5.3 of the 21 characteristics in the question. Persons with a vague idea 5.8 and those with NO knowledge only name 3.3 characteristics.



Please tell me which of these characteristics do you think particularly apply to Greenland?
 Basis: All respondents in North America 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 North America 2023 by NIT

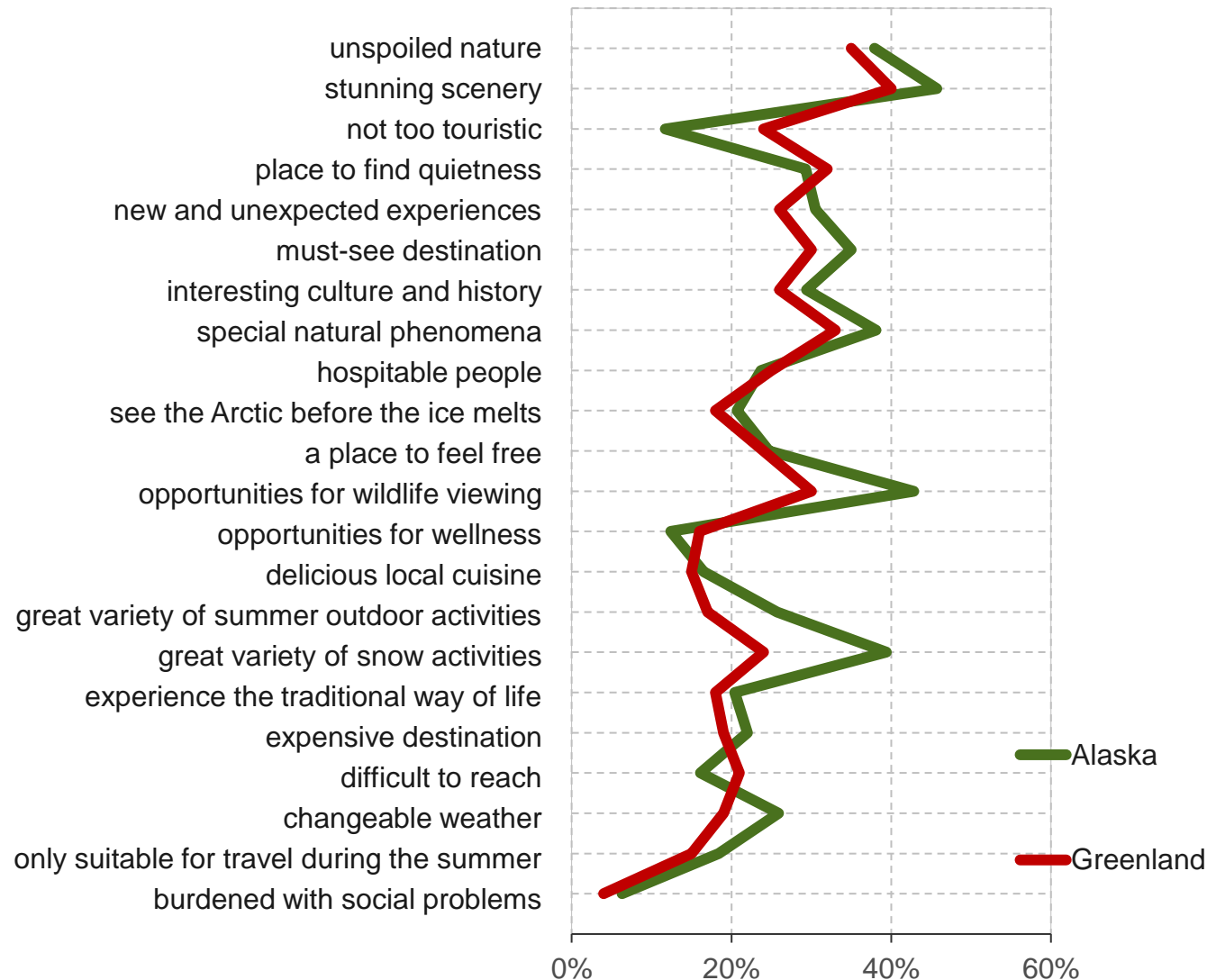
Image of Greenland and Iceland on the North American market



- » In addition to the image of Greenland, the questionnaire also asked for the image of Iceland and Alaska.
- » Comparing the images of Greenland and Iceland, we can observe that the profiles of both countries are very similar and the top characteristics are the same: “stunning scenery”, “unspoiled nature”, “natural phenomena”.
- » More characteristic for Greenland than for Iceland:
 - » Not too touristic (+9%-pts.)
 - » Difficult to reach (+5%-pts.)
- » More characteristic for Iceland than for Greenland:
 - » Wellness (+7%-pts.)
 - » Hospitable people (+5%-pts.)
 - » Must-see destination (+5%-pts.)

Please tell me which of these characteristics do you think particularly apply to Greenland?
 Basis: All respondents in North America (n=3,500)
 Source: Visit Greenland market study North America 2023 by NIT

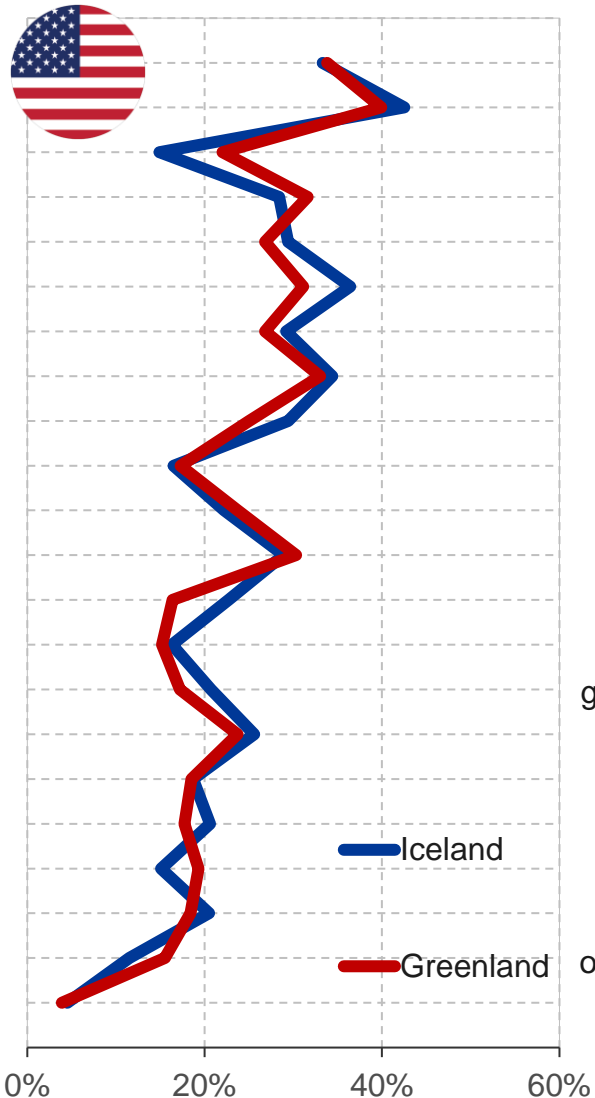
Image of Greenland and Alaska on the North American market



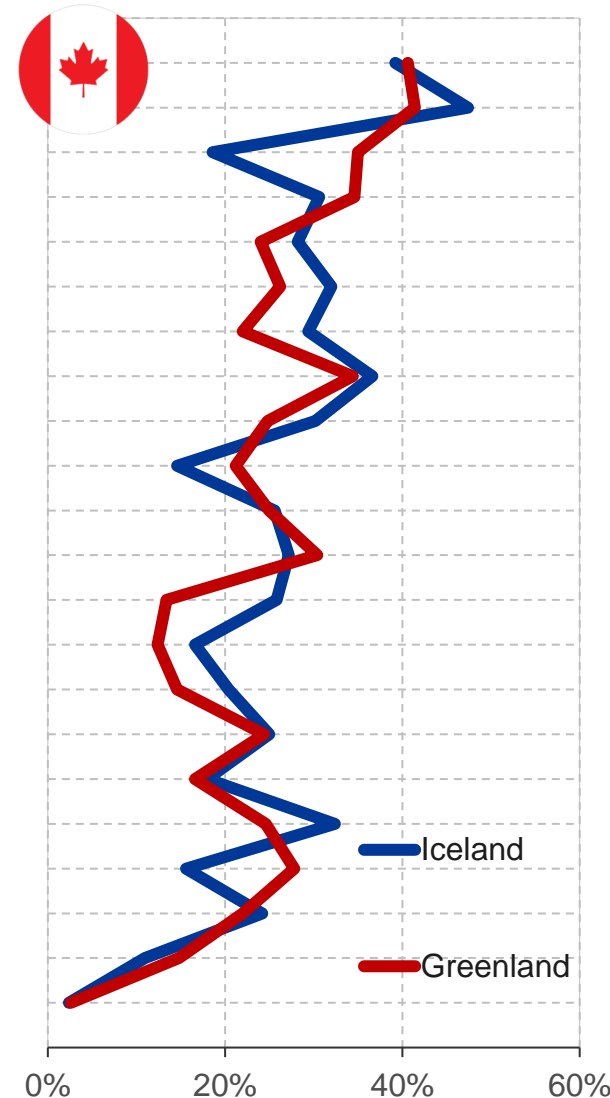
- » In addition to the image of Greenland, the questionnaire also asked for the image of Alaska.
- » Comparing the images of Greenland and Alaska, it is striking that almost all characteristics are more often associated with Alaska than with Greenland. This is particularly clear for characteristics that include "stunning scenery", "wildlife viewing" and "variety of snow activities".
- » More characteristic for Greenland than for Alaska:
 - » Difficult to reach (+5%-pts.)
 - » Not too touristic (+12%-pts.)

Please tell me which of these characteristics do you think particularly apply to Greenland/Alaska?
 Basis: All respondents in North America (n=3,500)
 Source: Visit Greenland market study North America 2023 by NIT

Image of Greenland and Iceland in the USA and Canada



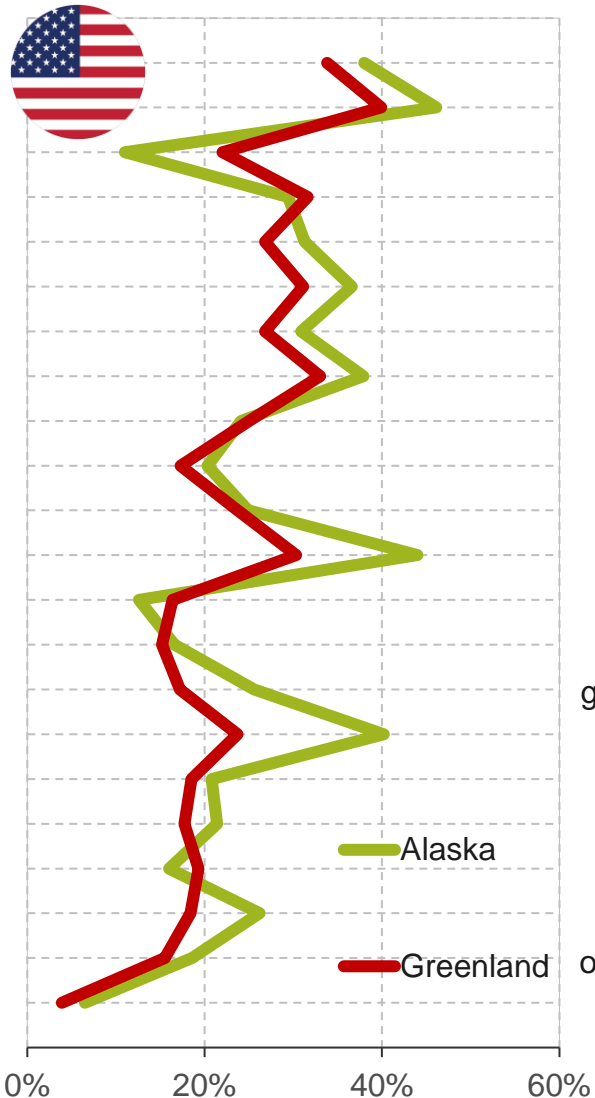
unspoiled nature
 stunning scenery
 not too touristic
 place to find quietness
 new and unexpected experiences
 must-see destination
 interesting culture and history
 special natural phenomena
 hospitable people
 see the Arctic before the ice melts
 a place to feel free
 opportunities for wildlife viewing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



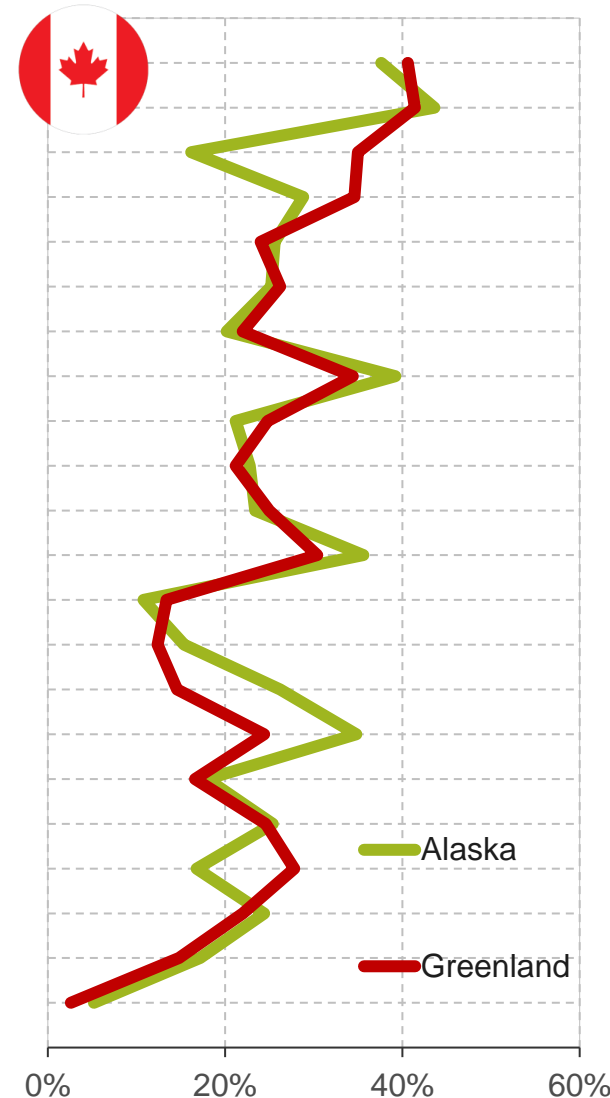
- » Looking at the both countries separately, we see some interesting differences.
- » In the Canadian population, the image of Greenland differs more clearly from that of Iceland than in the US population.
- » In Canada, it is mainly the following aspects in which the image of Greenland differs significantly from that of Iceland:
 - » Quietness (+16%-pts.)
 - » Difficult to reach (+12%-pts.)
 - » Wellness (-12%-pts.)
- » USA: Persons in the US population name on average a little less of the 21 characteristics in the question than in the Canadian population.
- » Greenland vs. Iceland
 - » Ø US-population: 5.1 vs. 5.2 items
 - » Ø Can. population: 5.3 vs. 5.5 items

Please tell me which of these characteristics do you think particularly apply to Greenland?
 Basis: All respondents in the USA (n=3,000) and Canada (n=500)
 Source: Visit Greenland market study North America 2023 by NIT

Image of Greenland and Alaska in the USA and Canada



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



- » Comparing the image of Alaska and Greenland in both countries, the following can be observed:
- » In the US population, the image of Greenland differs more clearly from that of Alaska than in the Canadian population.
- » In both Canada and the USA, Alaska has a (somewhat) clearer image than Greenland.
- » Except for the aspect "not too touristy", all image aspects of Greenland and Alaska receive higher approval in both countries.
- » Greenland vs. Alaska
 - » Ø US-population: 5.1 vs. 5.8 items
 - » Ø Can. population: 5.3 vs. 5.3 items

Please tell me which of these characteristics do you think particularly apply to Greenland?
 Basis: All respondents in the USA (n=3,000) and Canada (n=500)
 Source: Visit Greenland market study North America 2023 by NIT

To learn 2: Image of Greenland as a holiday destination



Knowledge of Greenland in North America

- » 21% of the population heard or read a lot about Greenland, 53% have only a vague idea and 23% knows 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 nearly doubles compared to the general population.

Image Greenland in North America:

- » The key image factors of Greenland in the North American population are: Stunning scenery, unspoiled nature, natural phenomena, a place to find quietness and opportunities for wildlife viewing.
- » Greenland is not famous for opportunities for wellness, only suitable for travelling in the summer, its delicious local cuisine, and being burdened with social problems.
- » Persons in North America name on average 4.7 of the 21 characteristics in the question.
- » Persons WITH interest to travel to Greenland consider it much more to be a must-see destination, to have interesting culture/history, a place to feel free, hospitable people, opportunities for wellness, a delicious local cuisine and the traditional way of life. 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 cultural topics. Persons WITH knowledge name on average 5.3 of the 21 characteristics in the question while those with NO knowledge only name 3.3 characteristics.

Image benchmarking in North America: Greenland and competitors

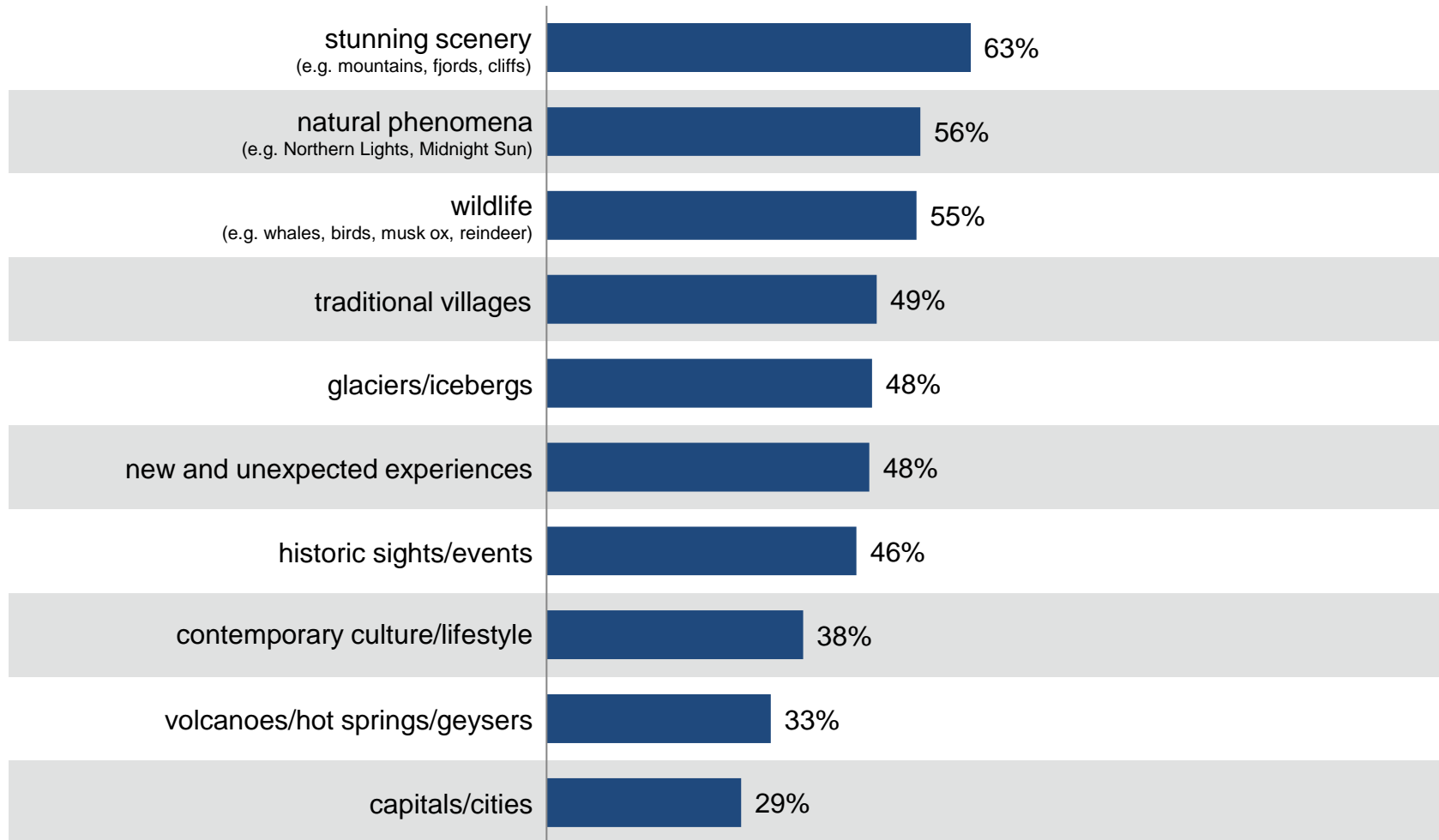
- » When benchmarking the images of Greenland and its main competitors Iceland and Alaska, we find that stunning scenery, unspoiled nature and natural phenomena are important image factors in all those destinations.
- » Greenland is sticking out over its two competitors regarding the following image characteristics: Not too touristic and difficult to reach.
- » The other destinations are sticking out over Greenland regarding the following characteristics ...
 - » Iceland: Wellness, hospitable people, must-see destination, summer outdoor activities
 - » Alaska: stunning scenery, wildlife viewing, variety of snow activities, natural phenomena

- » The results about the image of Greenland in North America 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 Alaska, 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 2023

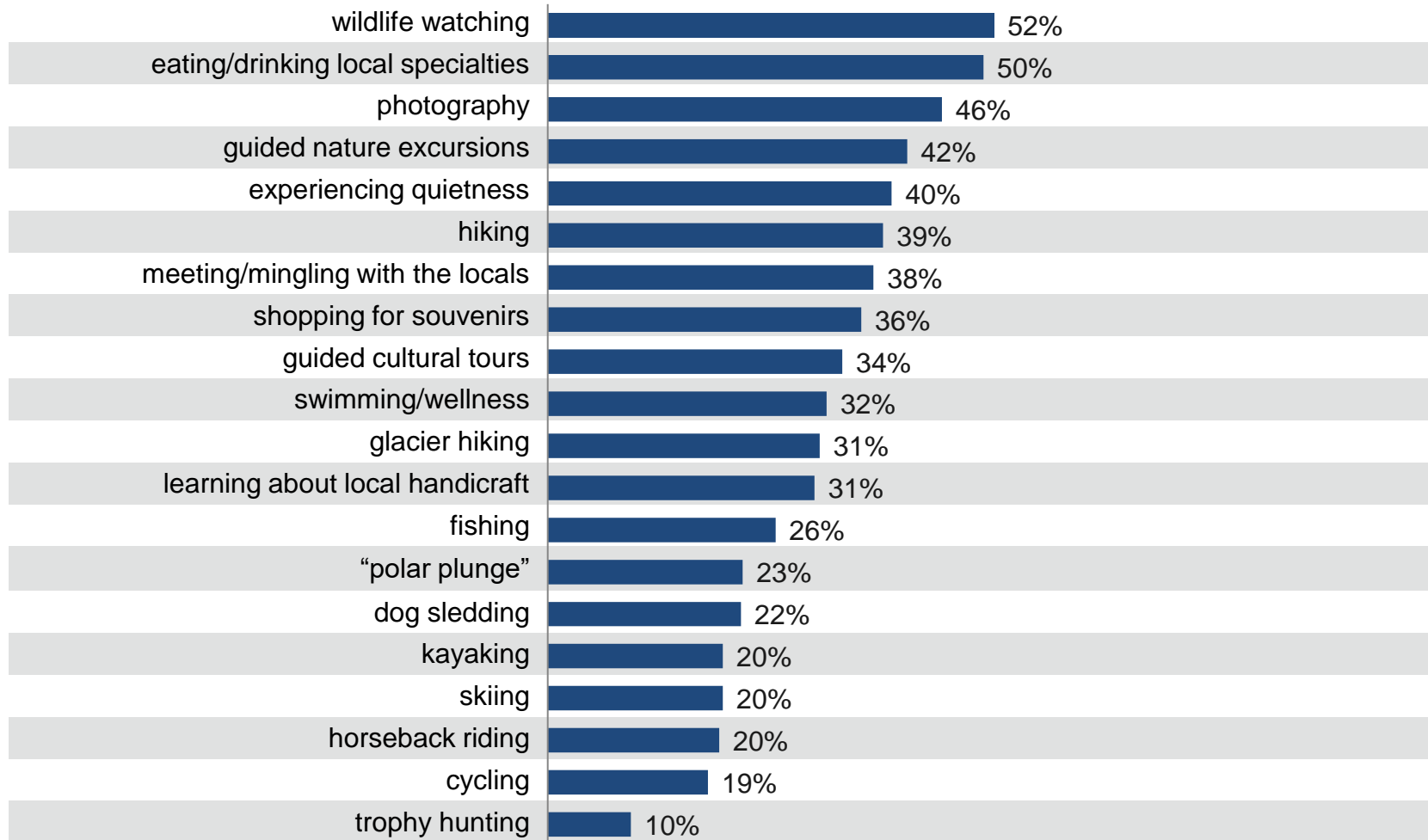
Potential travellers to Greenland: Preferred holiday experiences in Greenland



- » For potential Greenland travellers in Northern America it is most important to experience the stunning scenery, natural phenomena, wildlife and glaciers/icebergs.
- » Cities, volcanoes/hot springs and contemporary lifestyle are at the bottom of the ranking – but with figures of still around 30%.
- » On average 4.2 of the 10 aspects are of interest for potential Greenland travellers in North America.

When thinking about travelling to Greenland what would you like to see/experience?
 Basis: Potential travellers to Greenland from North America (n=886)
 Source: Visit Greenland market study North America 2023 by NIT

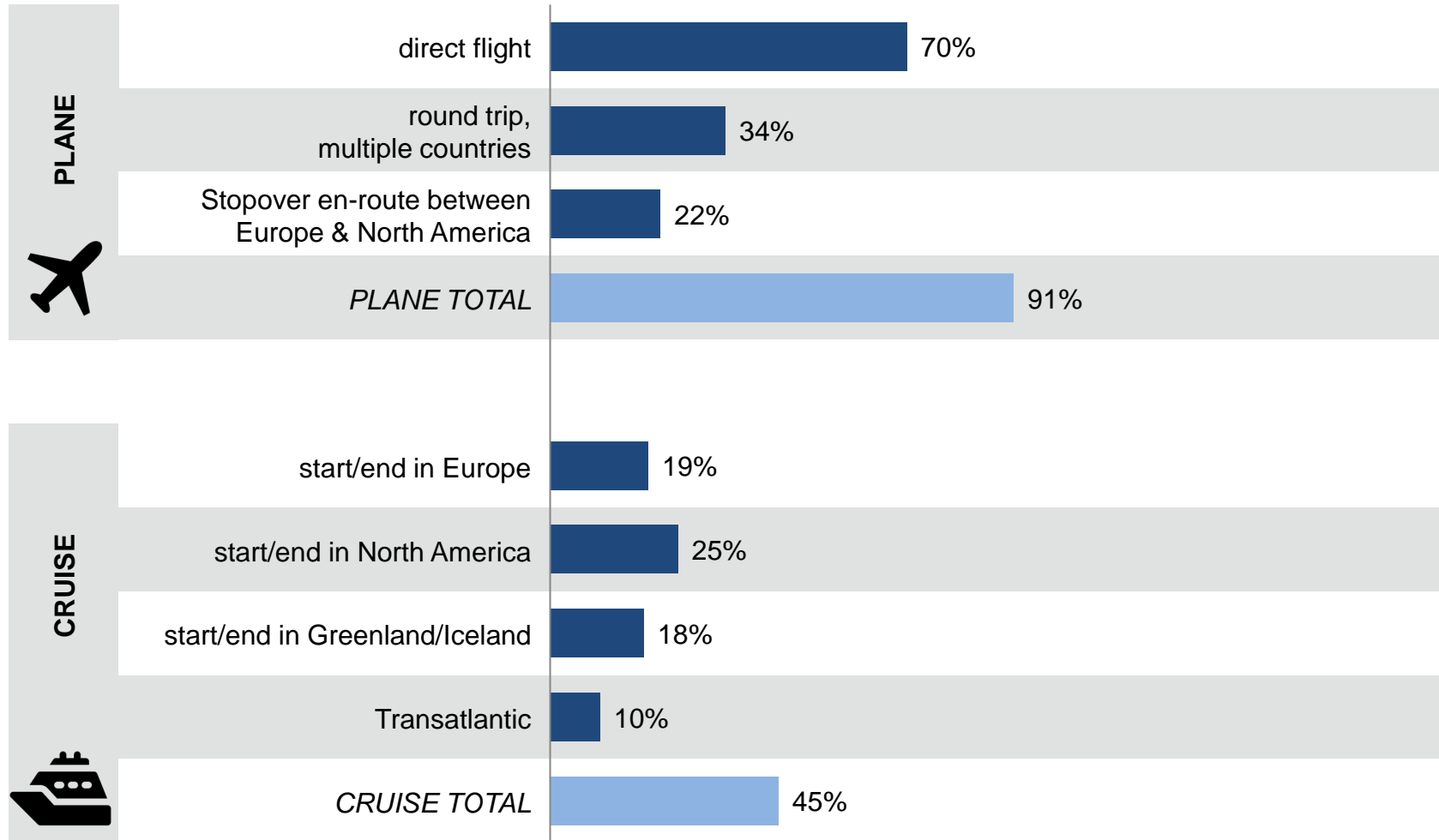
Potential travellers to Greenland: Preferred holiday activities in Greenland



- » The most sought-after activities in Greenland by potential travellers from Northern America are wildlife watching, eating/drinking local specialties, photography and guided nature excursions.
- » Less interesting are trophy hunting, cycling, horseback riding, skiing or kayaking.
- » Potential travellers from Northern America named on average 6,2 activities as interesting to them.

Which of the following activities would you like to do when travelling to Greenland?
 Basis: Potential travellers to Greenland from North America (n=886)
 Source: Visit Greenland market study North America 2023 by NIT,

Potential travellers to Greenland: Preferences about getting to Greenland



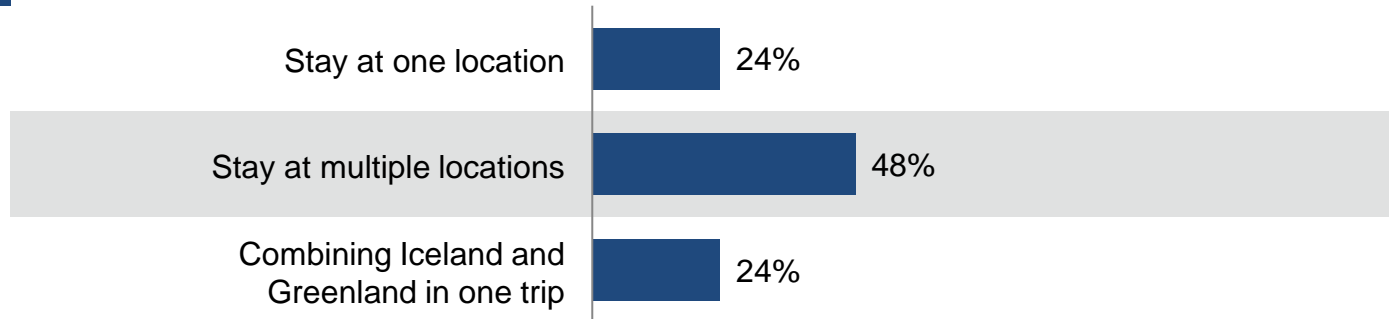
- » In total, 91% of the potential guests in North America would prefer the **plane** to travel to Greenland.
- » In detail, 70% prefer direct flights to Greenland; 34% want to visit Greenland during a multi country air trip and 22% as a stop between Europe and North America.
- » 45% of the potential guests in North America would like to visit Greenland on a **cruise**.
- » In detail, 25% would like it to start/end in North America, 19% prefer the start/end to be in Europe and 18% would like it to start/end in Greenland/Iceland.

How would you like to travel to Greenland?
 Basis: Potential travellers to Greenland from North America (n=886)
 Source: Visit Greenland market study North America 2023 by NIT

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

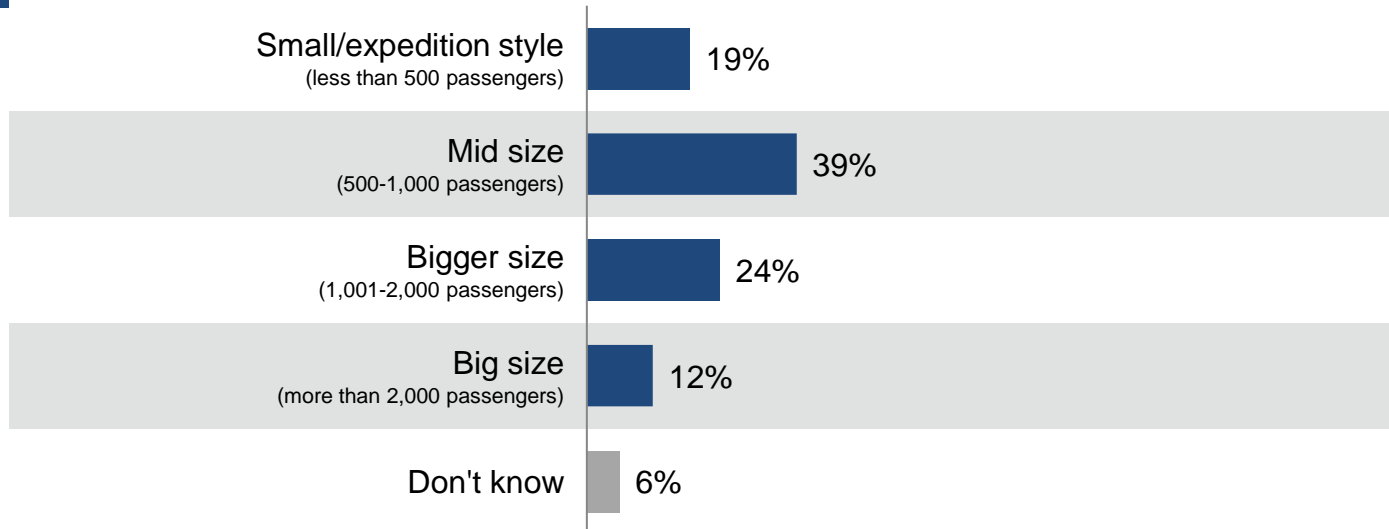


Travel by plane



» Among the potential **plane** travellers (direct or with stop over), 48% prefer visiting multiple locations while in Greenland. 24% would like to stay at one location in Greenland and 24% can imagine combining Iceland and Greenland in one trip.

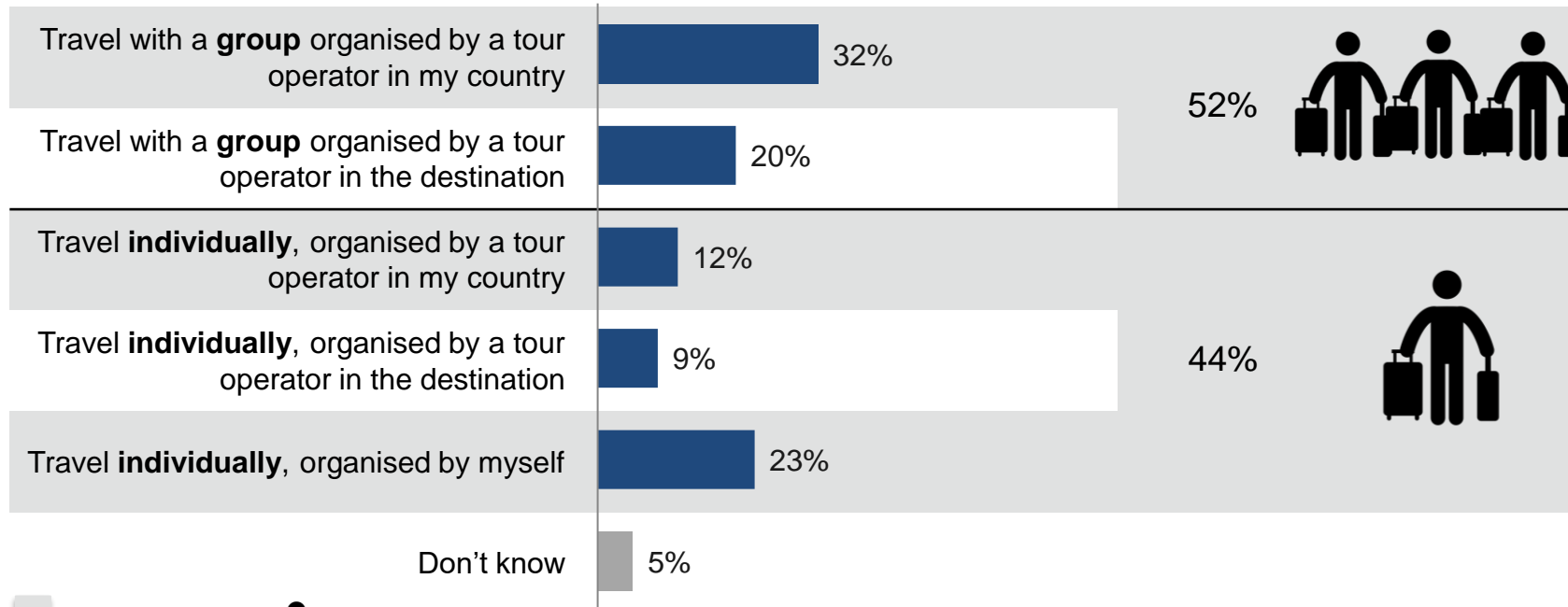
Travel by cruise



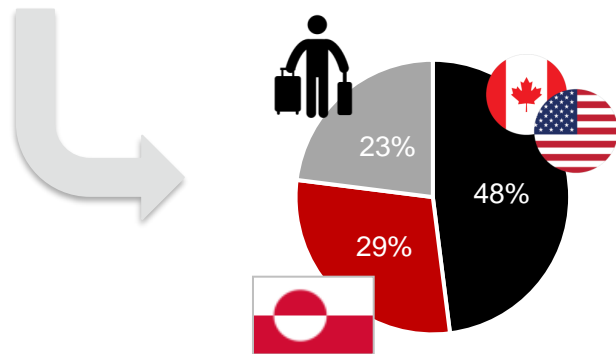
» Among the potential **cruise** travellers, the majority (39%) prefers a mid sized ship with 500 to 1,000 passengers and 24% prefer a bigger sized ship with up to 2,000 passengers. 19% are interested in a smaller or expedition style ship with less than 500 passengers. 12% would like to have a big sized 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 North America that prefer going to Greenland by plane (n=687) and by cruise (n=397)
Source: Visit Greenland market study North America 2023 by NIT

Potential travellers to Greenland: Preferences about travel organisation to Greenland



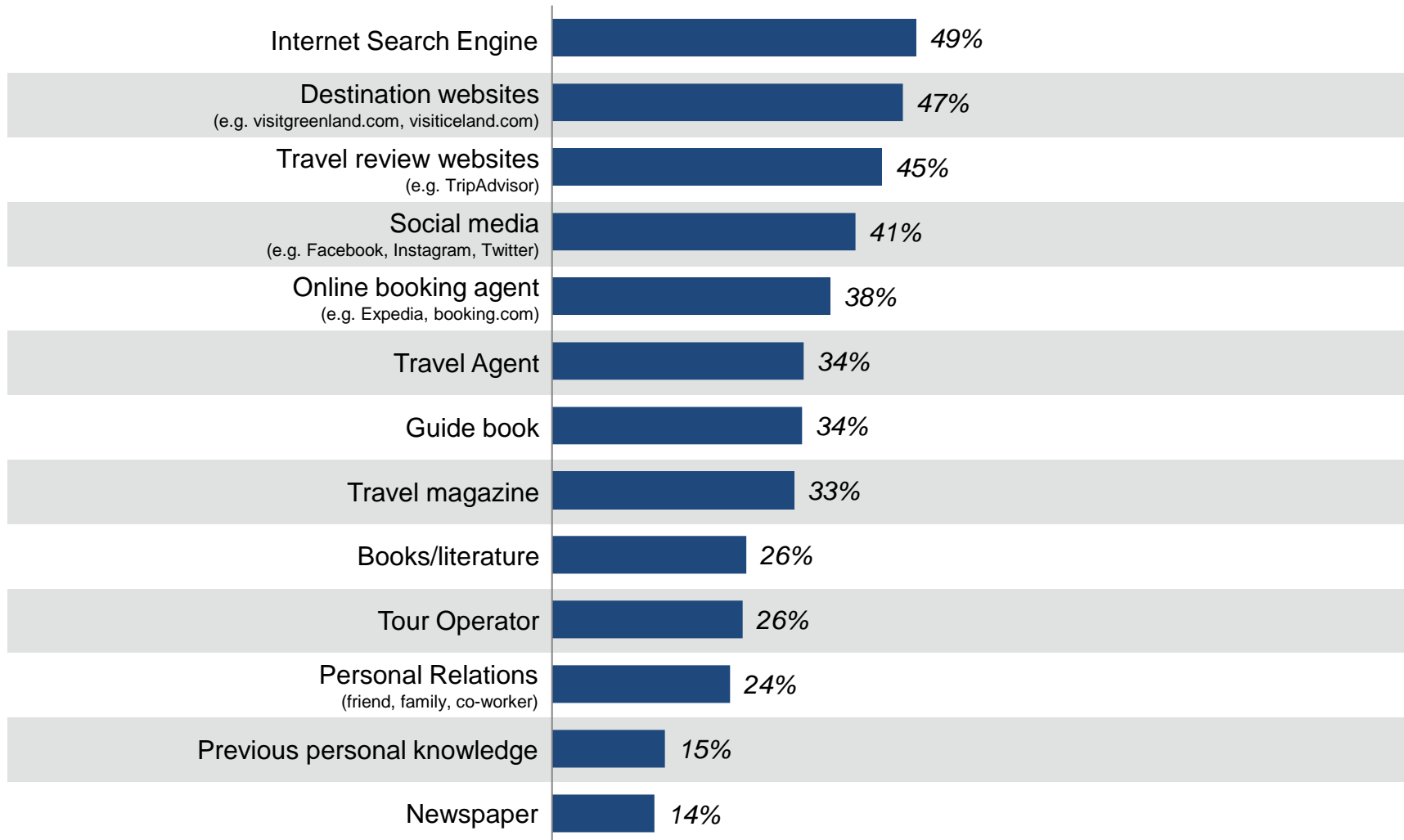
- » Among the potential **plane** travellers, the majority prefers to travel with a group (52%), either organised by a tour operator in North America (32%) or in the destination (20%).
- » 44% prefer travelling individually.
- » Overall, most potential North American plane travellers prefer the organisation of their Greenland trip by an operator in North America.



- Tour operator in my country
- Tour operator in the destination
- Self organisation

How would you like to organize your trip to Greenland?
 Basis: Potential travellers to Greenland from North America that prefer going by plane (n=805)
 Source: Visit Greenland market study North America 2023 by NIT

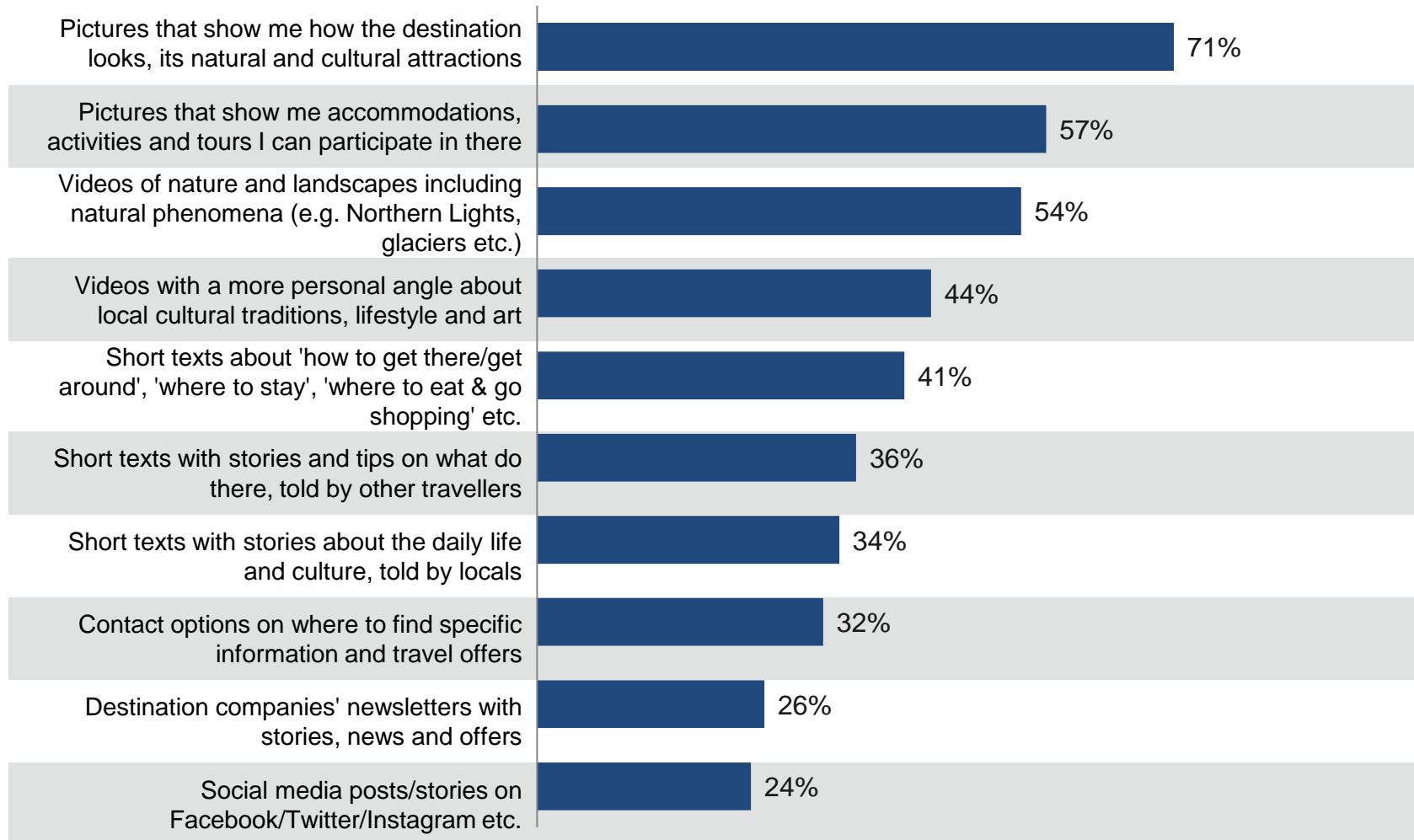
Potential travellers to Greenland: Preferred sources for inspiration & information



- » Internet search engines and destination websites would be used by almost half of the potential Greenland travellers for information and inspiration for their trip.
- » Travel review websites and social media also play a role in the search for information for more than 40%.
- » Newspapers and personal experience would be preferred by only 15% and 14% respectively.

When thinking about travelling to Greenland how would you like to look for inspiration/information for this trip?
 Basis: Potential travellers to Greenland from North America (n=886)
 Source: Visit Greenland market study North America 2023 by NIT

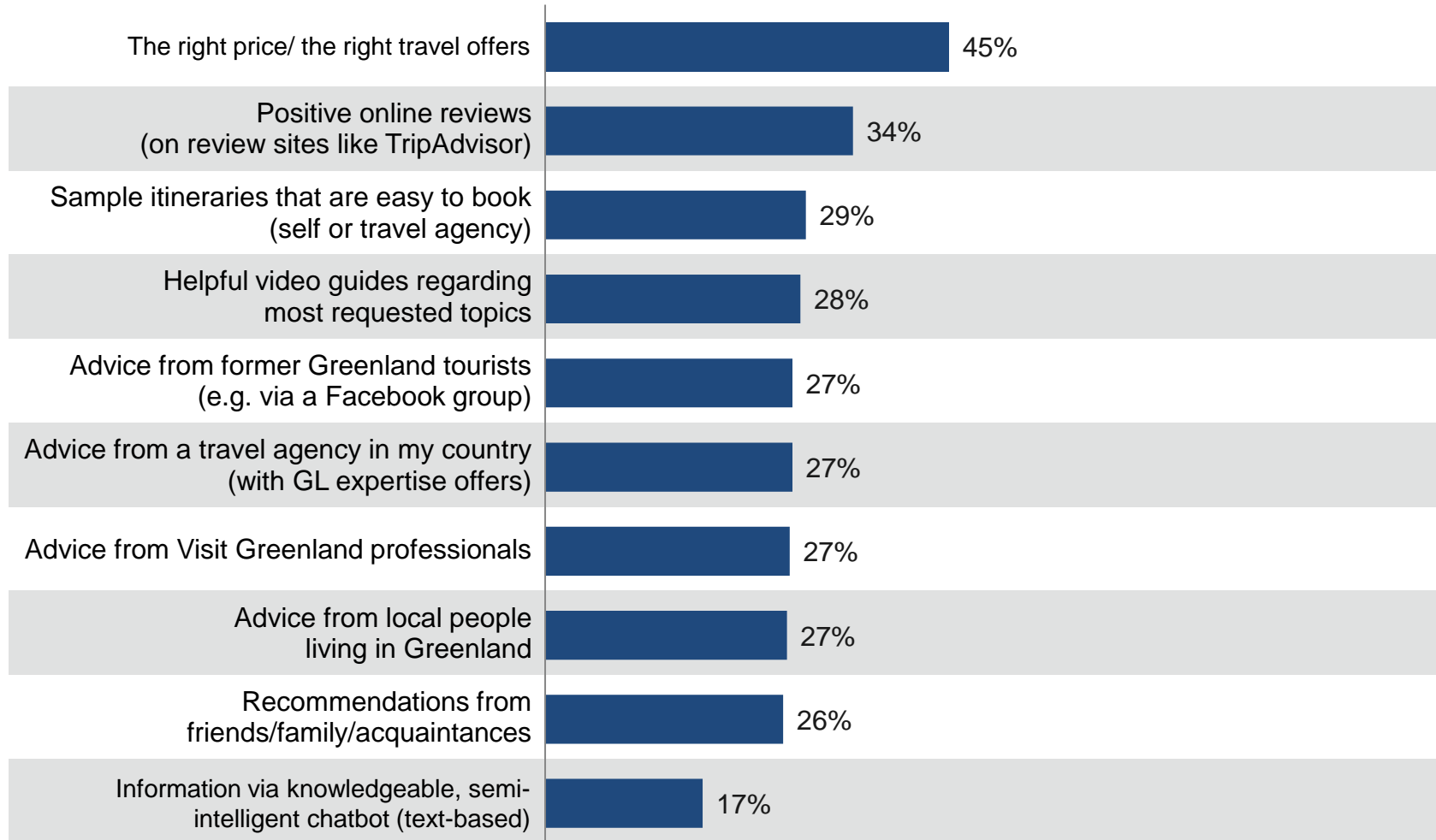
Potential travellers to Greenland: Preferred kind of online content



- » When asked for their preferred kind of online content, most potential Greenland guests in North America favour destination images, pictures of the accommodation, activities and tours or videos.
- » These seem to be basic prerequisites that every travel website should offer.
- » Comparatively few potential guests are interested in destination newsletters or social media posts.
- » This shows that potential traveller more and more prefer a vivid visual imagery of Greenland.

Which kind of content do you like to find when looking for online information about Greenland?
 Basis: Potential travellers to Greenland from North America (n=886)
 Source: Visit Greenland market study North America 2023 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 followed by positive online reviews.
- » All other aspects of decision-making are at about the same level and are used by every third to fourth person interested in Greenland.
- » Only chatbots are less in demand.

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?

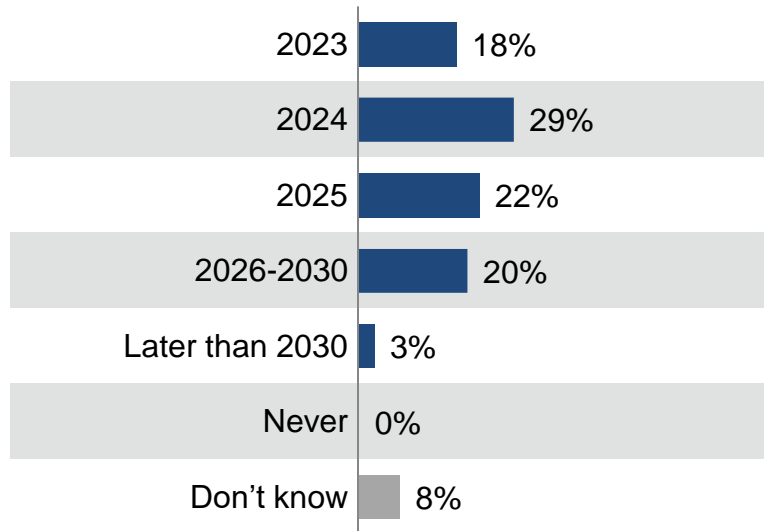
Basis: Potential travellers to Greenland from North America (n=886)

Source: Visit Greenland market study North America 2023 by NIT

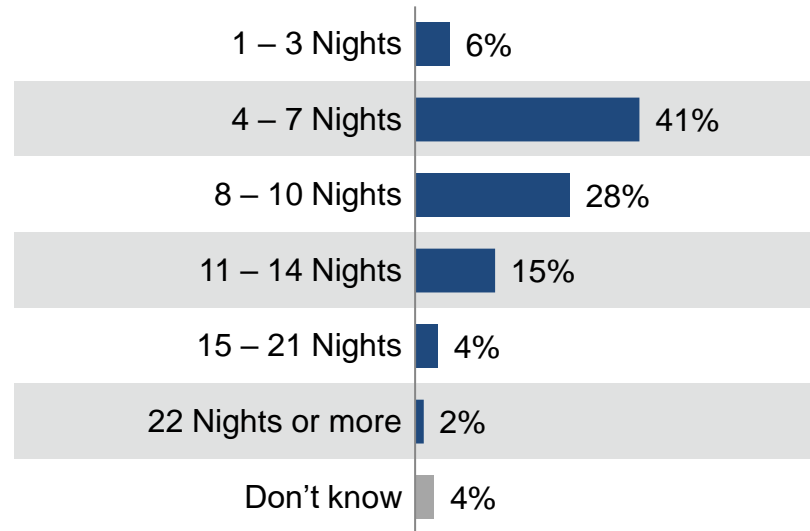
Potential travellers to Greenland: Potential time of travel, duration and preferred months



Visit (next time)



Duration

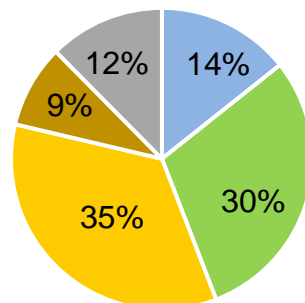


» The survey also asked details about the **year** when the trip to Greenland is likely to come true: 18% of the potential travellers plan on visiting Greenland this year (2023), 29% in 2024, 22% in 2025 and 20% in 2026 or later.

» When asked about **how much time** they would like to spend in Greenland nearly half of the travellers (43%) want to spent between one and two weeks, slightly more 47% less a week or less and the rest more than two weeks.

» When asked about the preferred **months** to travel to Greenland, most potential travellers prefer going to Greenland in July/August/September (35%), followed by April/May/June (30%).

Preferred months

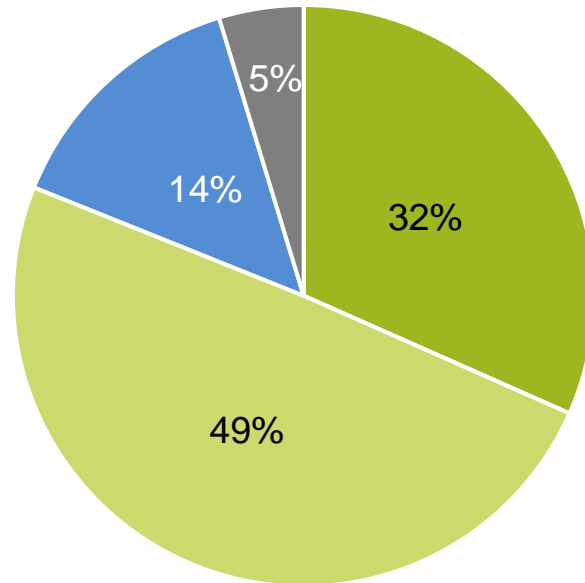


- January, February, March
- April, May, June
- July, August, September
- October, November, December
- Don't know

*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 North America (n=886); Source: Visit Greenland market study North America 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.
- » 32% state that sustainability will be the critical deciding factor and 49% consider it one of several aspects influencing the decision for a specific offer. Only a small share (14%) do not really consider sustainability and even less (5%) 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.

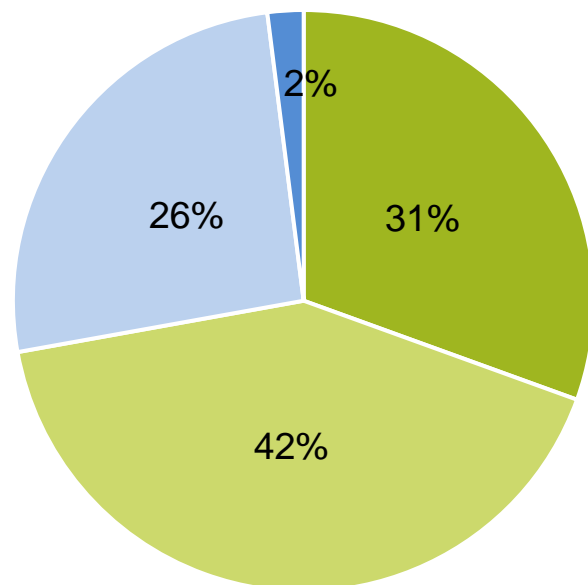
Sustainable travel is **not something that interests me in general**.

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 North America (n=886)

Source: Visit Greenland market study North America 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 majority (42%) consider themselves as quality-oriented,
- » 31% state that the price only plays a minor role during the decision-making process. This group can be considered as luxury tourists.
- » 26% are more price-oriented when travelling to Greenland.
- » Only a minority of 2% belongs to the so-called cheap-tourists that only pay attention to the 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 North America (n=886);

Source: Visit Greenland market study North America 2023 by NIT

To learn 3: Greenland product preferences 2023



Experiences:

- » For potential Greenland travellers in North America it is most important to experience the stunning scenery, natural phenomena and wildlife.

Activities:

- » The most sought-after activities in Greenland by potential travellers from North America are wildlife watching, eating/drinking local specialties photography and guided nature excursions. Potential travellers from North America named on average 6.2 activities as interesting to them.

Getting there/around/organisation:

- » Most potential Greenland travellers in North America would prefer direct flights into Greenland and staying at multiple locations when being in Greenland. Among the plane travellers the majority prefers travelling with a group and a tour operator in North America to organise the trip. There is a share of around 46% of the potential guests in North America who want to visit Greenland as a cruise destination, 39% 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 North America when planning a trip to Greenland.

Online content:

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

Final decisive input:

- » In this phase right before the travel decision to Greenland it is crucial to find the “right” product with the “right” price. Following, but on a lower level of approval, are positive online reviews.

Potential time of travel, duration and preferred months

- » 18% of the potential travellers plan on visiting Greenland this year (2023), 29% in 2024, 22% in 2025 and 20% later than 2026. Nearly half of the travellers would like to spend between up to one week, 28% 8-10 nights. Most travellers prefer going in the summer months, followed by late spring.

Importance of price and quality

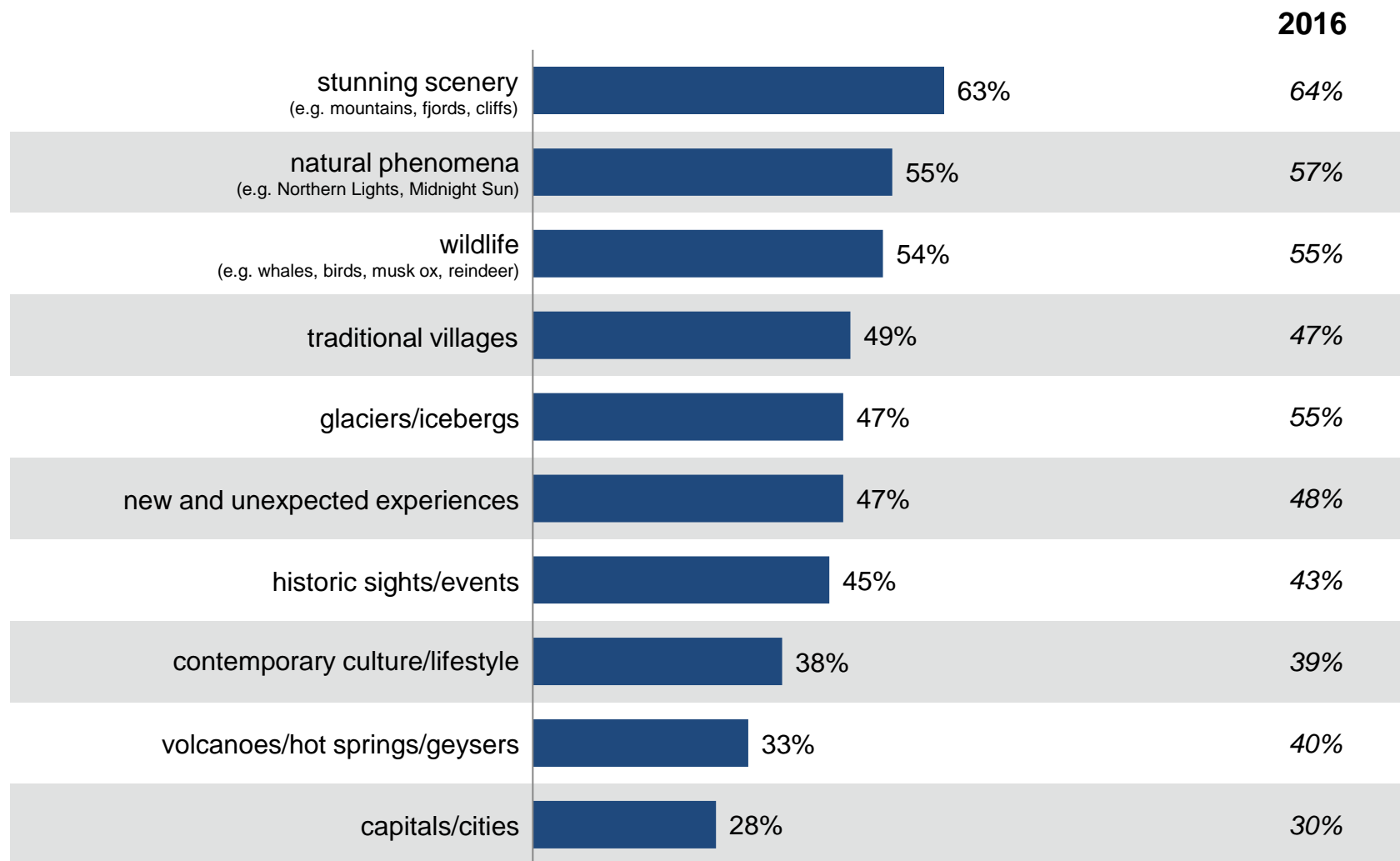
- » 42% of the potential travellers are more quality-oriented while 26% are more price-oriented when travelling to Greenland. A quite high share of 31% pays no attention to the price at all and 2% are only focused on a low price.

- » 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 or with the Visit Greenland segments (chapter 5).



4. Greenland product preferences:
Timeline comparison (USA only)

Potential travellers to Greenland: Preferred holiday experiences in Greenland – USA

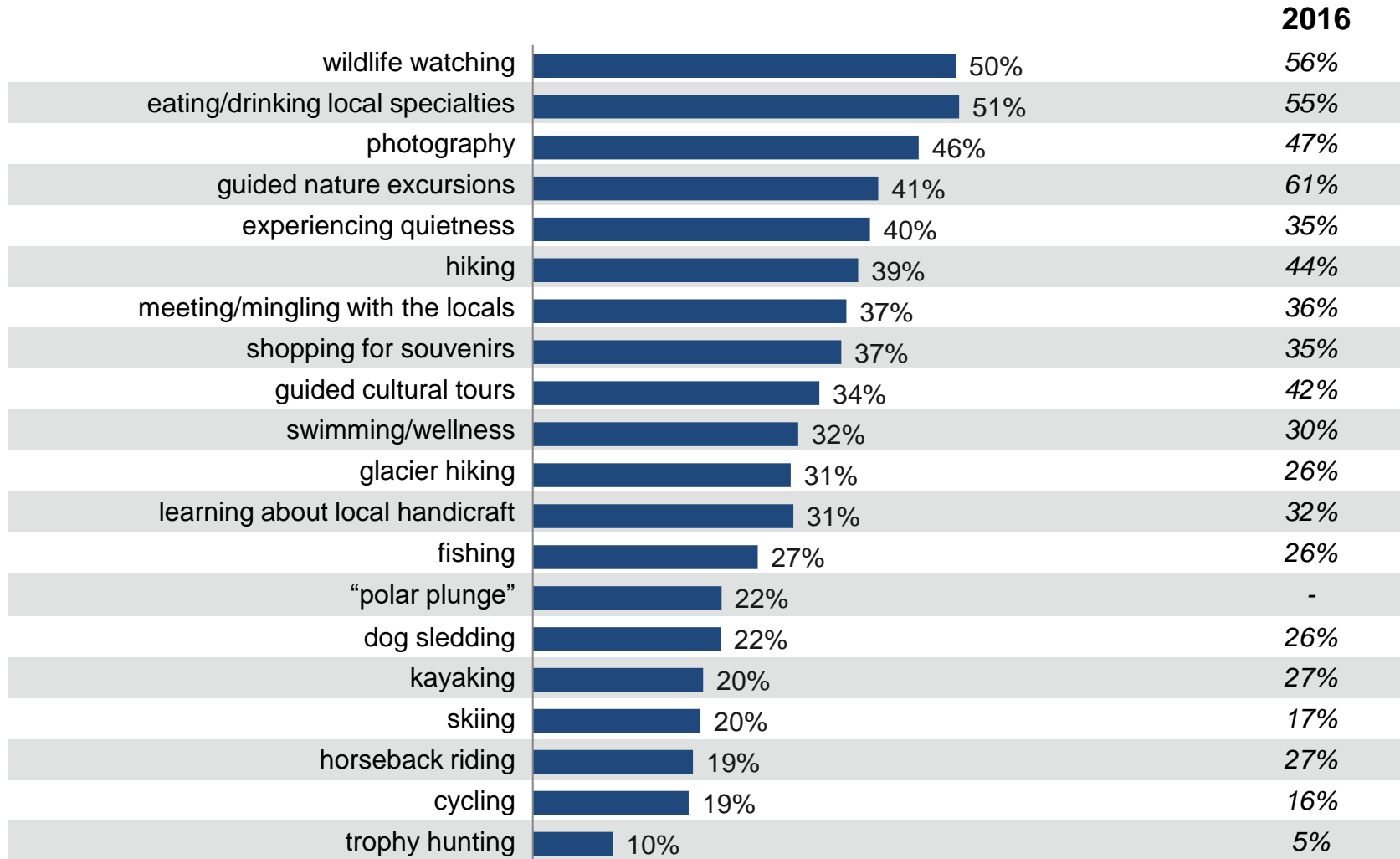


- » Timeline-comparisons are only possible for the US market, as the previous study in 2016 did not cover Canada. Hence, this chapter is looking at the US market alone.
- » The ranking of preferred holiday experiences of potential travellers to Greenland in the US does not differ from the ranking in North America as a whole.
- » There are few differences compared to the 2016 survey: The ranking and the characteristics of the aspects from 2016 remains almost unchanged in 2023, only the nature-related aspects "glaciers/icebergs" and "volcanoes/hot springs/geysers" lose 8 and 7%-pts. in importance respectively.

When thinking about travelling to Greenland what would you like to see/experience?

Basis: Potential travellers to Greenland from the USA (n=793)
Source: Visit Greenland market study USA 2023 by NIT, Visit Greenland market study USA 2016 by NIT

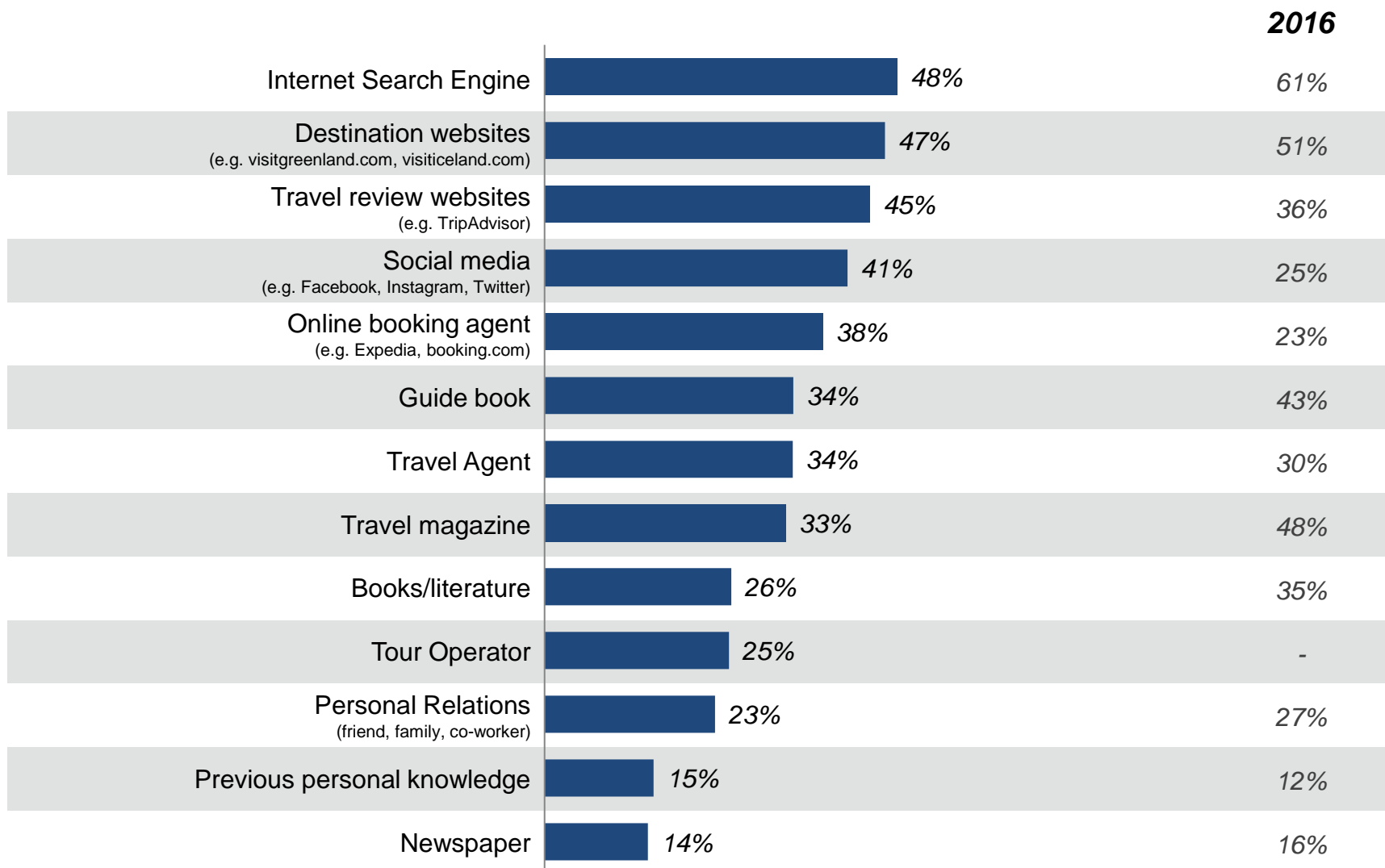
Potential travellers to Greenland: Preferred holiday activities in Greenland - USA



- » The preferred top holiday activities in Greenland of potential travellers in the US have hardly changed compared to 2016: Wildlife, eating and drinking and photography lead the rankings. Only guided nature excursions, still in third place with 60% in 2016, lost 20%-pts and is only in fourth place with 41% in 2023.
- » In general special nature focussed activities have become somewhat less important.
- » Compared with 2023, the potential travellers in the US report slightly less preferred activities on average than in 2016 (2023: Ø 6,3 activities, 2016: Ø 6,6 activities).

Which of the following activities would you like to do when travelling to Greenland?
Basis: Potential travellers to Greenland from the USA (n=886)
Source: Visit Greenland market study USA 2023 by NIT, Visit Greenland market study USA 2016 by NIT

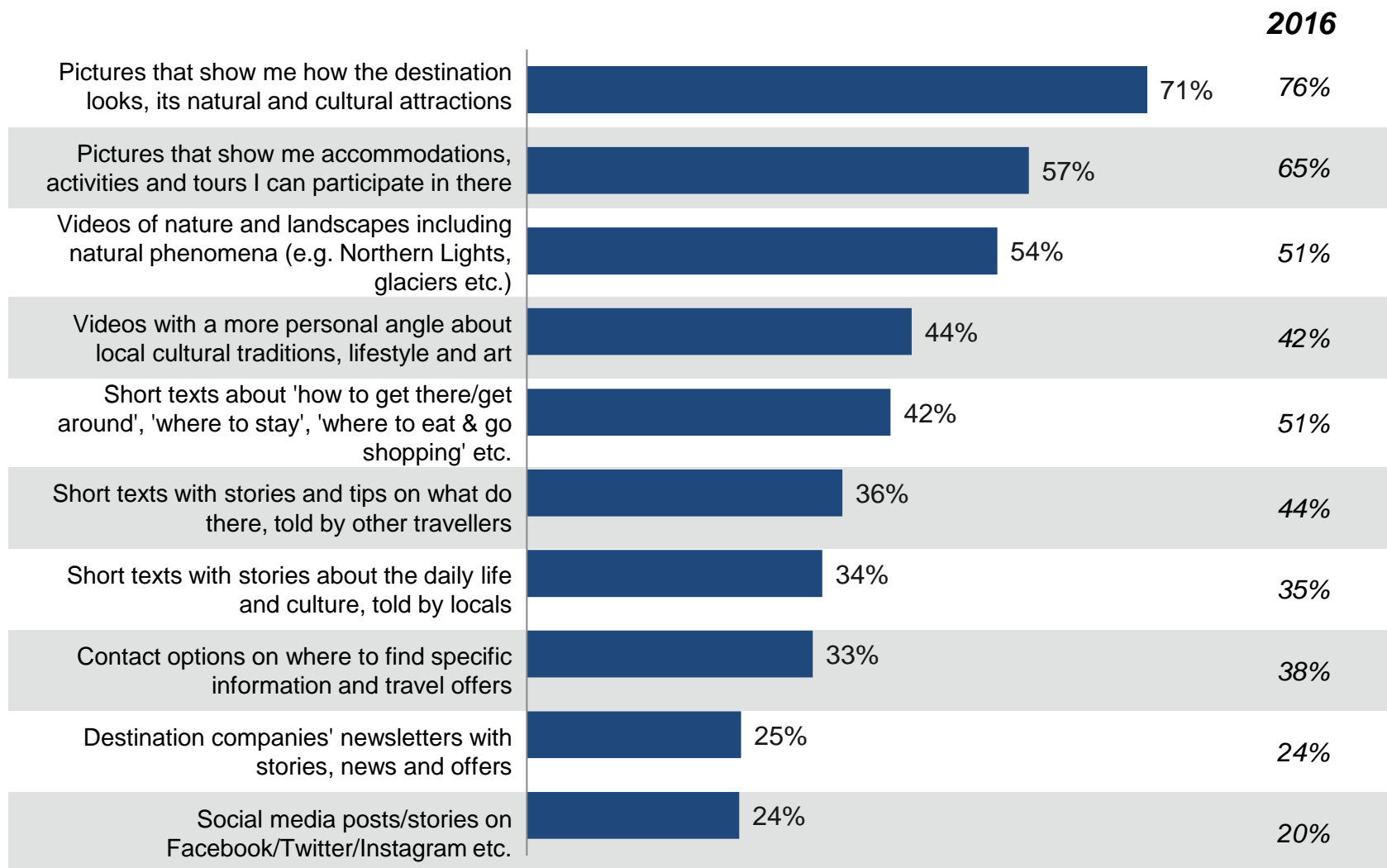
Potential travellers to Greenland: Preferred sources for inspiration & information - USA



- » Compared to 2016, there has been a significant decline in with the potential travellers to Greenland in the US by searching for information via internet search engine. The same applies to guide books, travel magazines and literature.
- » Channels such as travel review websites, social media and online booking agents have become much more important.

When thinking about travelling to Greenland how would you like to look for inspiration/information for this trip?
 Basis: Potential travellers to Greenland from USA(n=793)
 Source: Visit Greenland market study North America 2023 by NIT, Visit Greenland market study USA 2016 by NIT

Potential travellers to Greenland: Preferred kind of online content - USA



- » Compared to 2016, the potential travellers to Greenland in the US show little change in the ranking of preferred online content.
- » Images remain at the top of the list, followed by video content, despite a slight drop in shares.
- » Overall, fewer sources were cited per person on average in 2023 than in 2016.
- » Only information on social media posts and nature videos were able to increase their shares.

Which kind of content do you like to find when looking for online information about Greenland?

Basis: Potential travellers to Greenland from USA (n=793)
Source: Visit Greenland market study USA 2023 by NIT, Visit Greenland market study USA 2016 by NIT

To learn 4: Greenland product preferences

Timeline comparison (USA only)



Experiences:

- » There are few differences compared to the 2016 survey: The ranking and the characteristics of the aspects from 2016 remains almost unchanged in 2023, only the nature-related aspects "glaciers/icebergs" and "volcanoes/hot springs/geysers" lose 8 and 7%-pts. in importance respectively.

Activities:

- » The preferred top holiday activities in Greenland of potential travellers in the US have hardly changed compared to 2016: Wildlife, eating and drinking and photography lead the rankings. Only guided nature excursions, still in third place with 60% in 2016, lost 20%-pts and is only in fourth place with 41% in 2023.
- » In general special nature focussed activities have become somewhat less important.
- » Compared with 2023, the potential travellers in the US report slightly less preferred activities on average than in 2016 (2023: Ø 6,3 activities, 2016: Ø 6,6 activities).

Information sources:

- » Compared to 2016, there has been a significant decline in with the potential travellers to Greenland in the US by searching for information via internet search engine. The same applies to guide books, travel magazines and literature.
- » Channels such as travel review websites, social media and online booking agents have become much more important.

Online content:

- » Compared to 2016, the potential travellers to Greenland in the US show little change in the ranking of preferred online content.
- » Images remain at the top of the list, followed by video content, despite a slight drop in shares.
- » Overall, fewer sources were cited per person on average in 2023 than in 2016.
- » Only information on social media posts and nature videos were able to increase their shares.

- » The timeline comparison shows important trends and helps to interpret the results regarding product preferences in a better way.
- » Regarding experiences and activities the dynamics between nature, culture, and physical exercise are very interesting.
- » The results about the information sources and online content on the one hand confirm general trends, like more online less offline and more visual content rather than text. But on the other hand they show that it is worthwhile and necessary to look into the details to make the right decisions in the end.

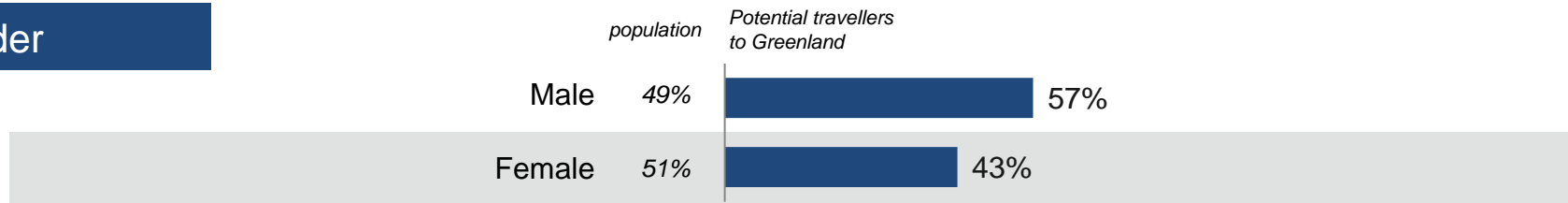
A group of people are playing soccer on a dirt field in a coastal village. In the foreground, a man in a black jacket and light-colored pants is kicking the ball, while another man in a black and red jacket is blocking him. Other people are watching or playing in the background. The buildings are blue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

4. Potential travellers to Greenland: Socio-demographic profiles

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

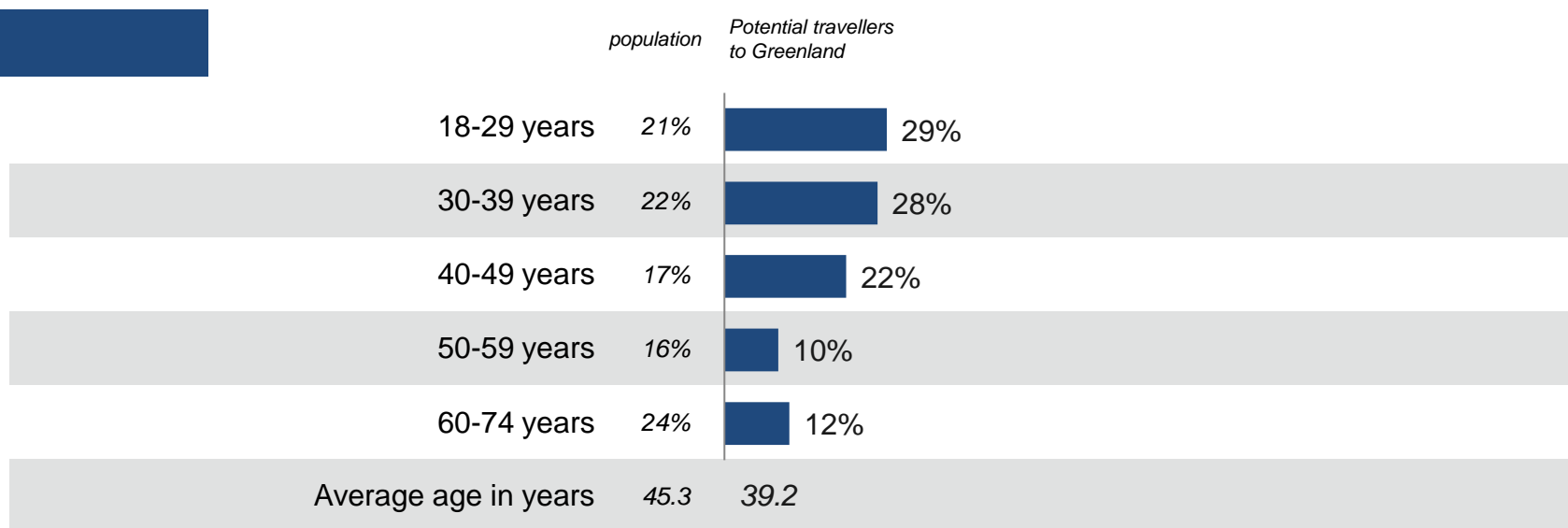


Gender



» Among potential Greenland travellers from North America, the proportion of men is significantly higher than that of women.

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 and the 50 to 59 years old potential travellers are the smallest with around 10% each.

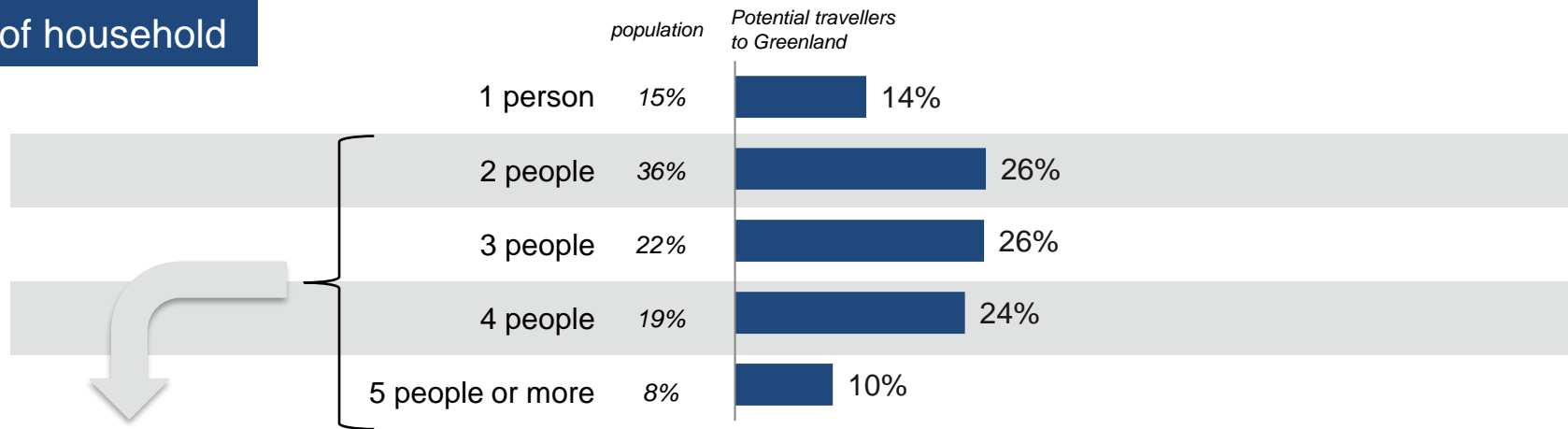
» The average age of potential travellers to Greenland from North America is 39.2 years.

Basis: All respondents in North America (n=3,500), potential travellers to Greenland from North America (n=886); Source: Visit Greenland market study North America 2023 by NIT

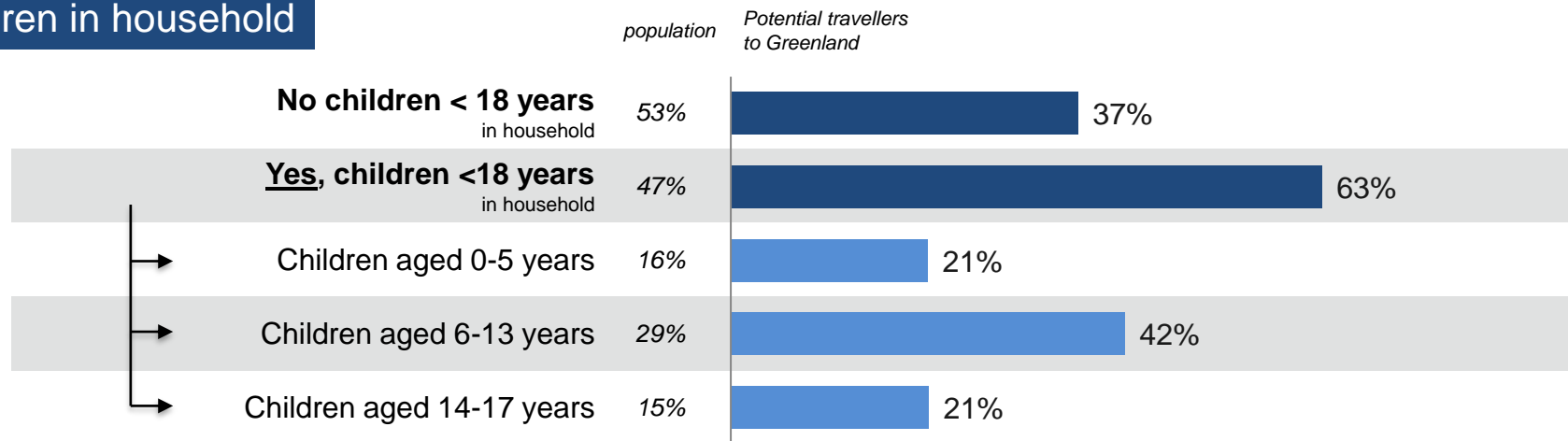
Potential travellers to Greenland: Demographics II (size of household)



Size of household



Children in household



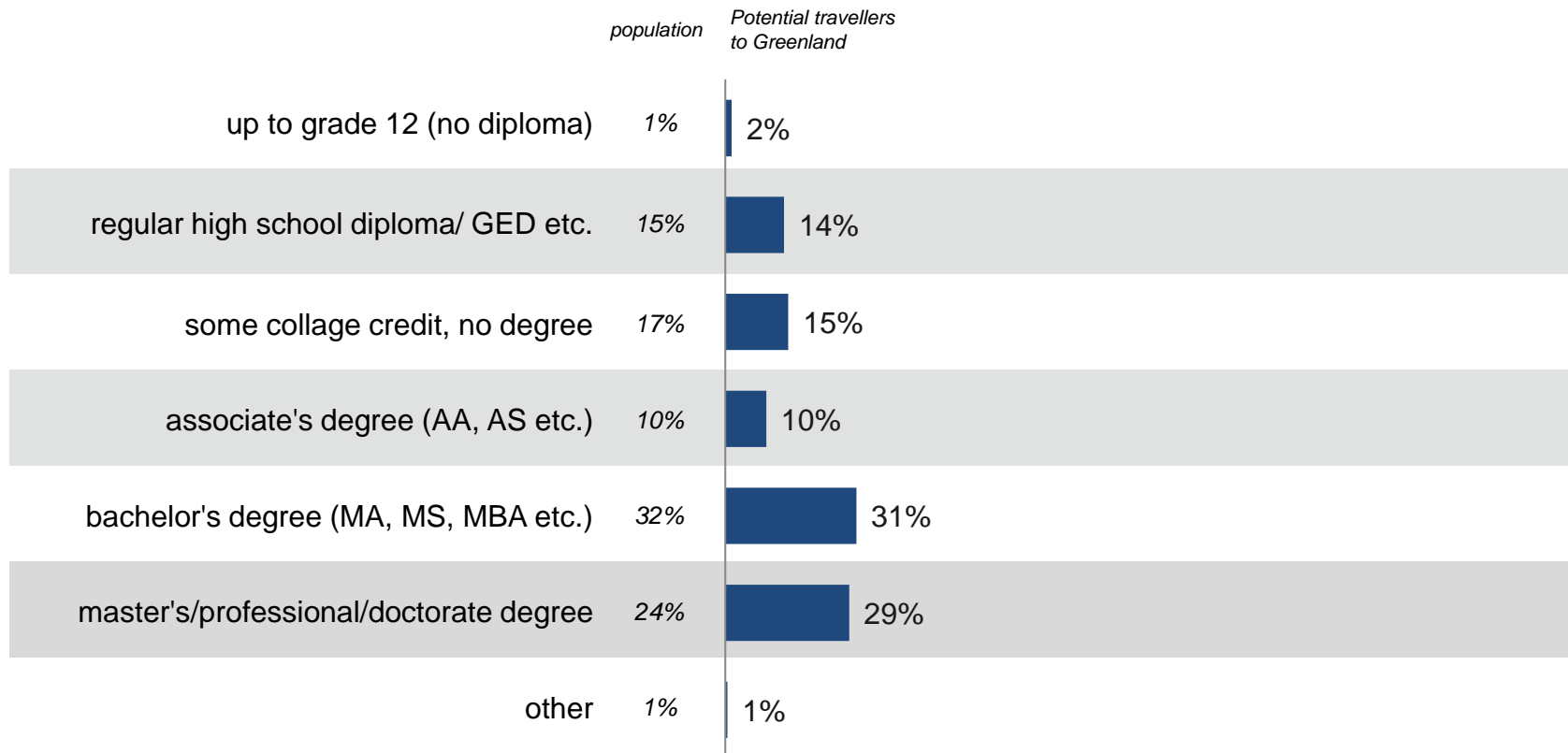
- » The potential Greenland travellers from North America live in roughly equal numbers in 2, 3 or 4 person households (24-26% each). At 14% and 10% respectively, the share of larger or one-person households is significantly smaller.
- » Two thirds of the potential travellers to Greenland from households with 2 or more people live with children in the household. This is a much higher share than in the North American population.
- » 21% of these potential travellers have children younger than 5 years in the household, 44% children aged from 6 to 13 and 24% have teenagers in the household.
- » The share of children in any of the age groups is considerably higher than in the population.

Basis: All respondents in North America (n=3,500, with 2 or more people in household n=2,963), potential travellers to Greenland from Germany (n=886, with 2 or more people in household n=765); Missing % to 100: No answer
Source: Visit Greenland market study North America 2023 by NIT

Potential travellers to Greenland: Demographics III (education)



Education



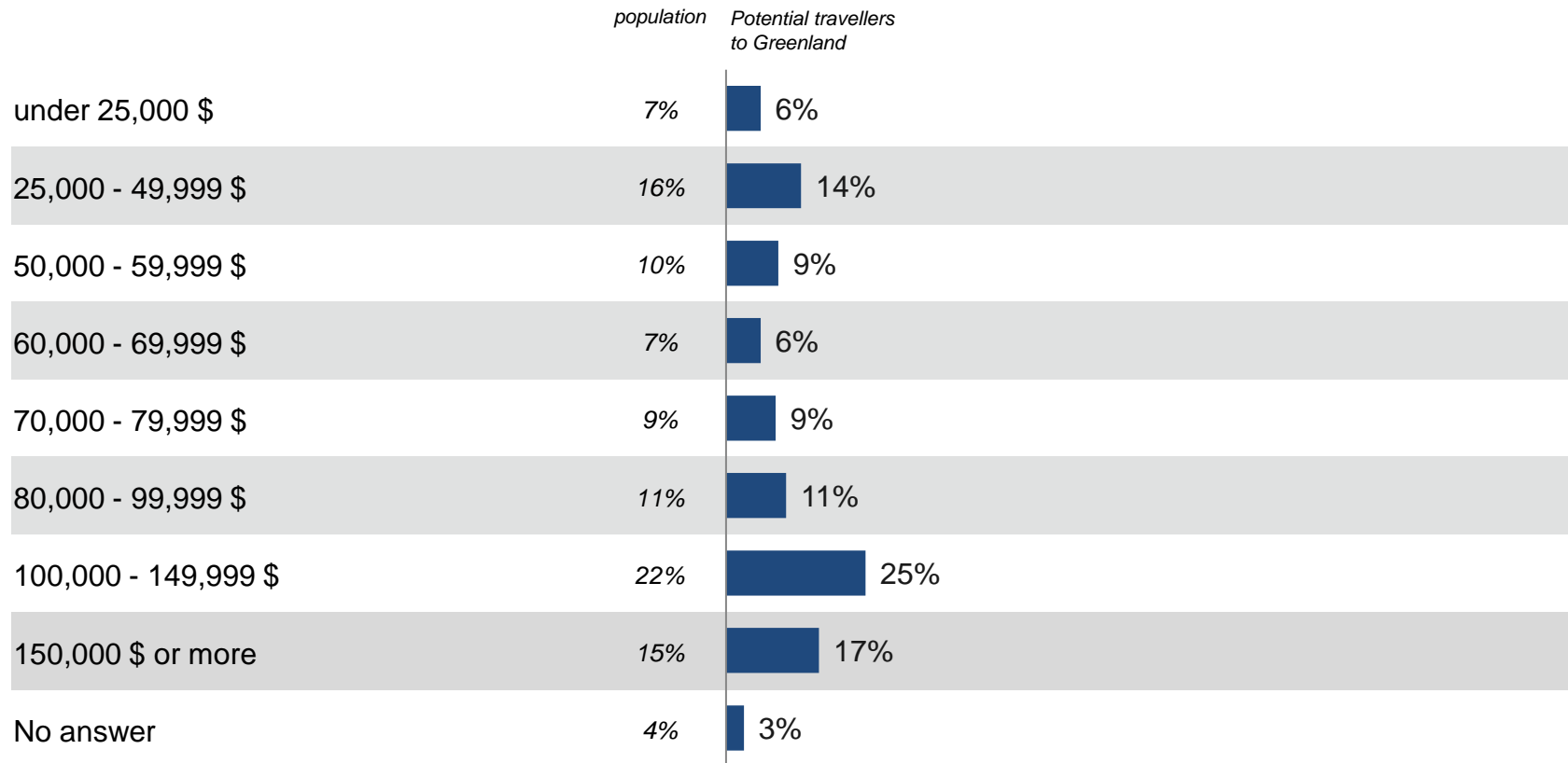
- » Regarding their formal education, we find that potential Greenland travellers in North America have a similar education level as the average North American population.
- » Half of the potential travellers from North America have at least a high education.

Basis: Total population (n=3,500) vs. potential travellers to Greenland from North America (n=866);
 Source: Visit Greenland market study North America 2023 by NIT

Potential travellers to Greenland: Demographics IV (income)



Household net income per year



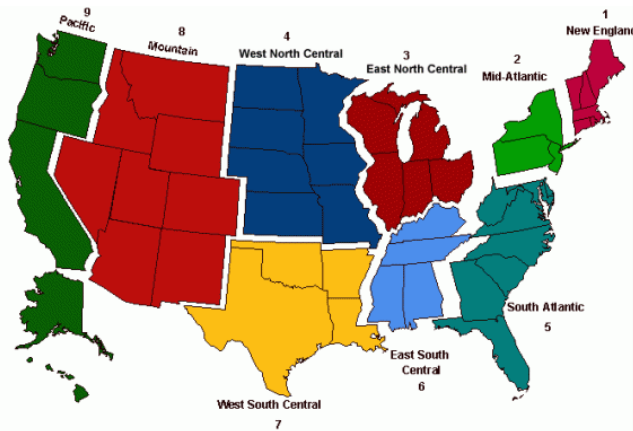
- » The majority of potential Greenland travellers (53%) have an annual household net income of above 80,000 \$.
- » Looking at the yearly income per household, the biggest group amongst potential travellers to Greenland earns 100,000-149,000 \$ (25%).
- » Yet, the share of groups with a yearly income higher than 100,000 \$ is bigger for the potential traveller than in the population.

Basis: Total population (n=3,500) vs. potential travellers to Greenland from North America (n=886);
 Source: Visit Greenland market study North America 2023 by NIT

Potential travellers to Greenland: Demographics V (regions)



Regions



	population	Potential travellers to Greenland
New England	6%	6%
Middle Atlantic	17%	17%
East North Central	8%	8%
West North Central	2%	2%
South Atlantic	22%	22%
East South Central	2%	2%
West South Central	8%	8%
Mountain	6%	6%
Pacific	18%	18%
Atlantic	1%	1%
Quebec	2%	2%
Ontario	5%	5%
West incl. BC	3%	3%
North	0%	0%

- » The regional spread of potential travellers to Greenland in the USA shows a concentration on the east and the west coast of the country and follows the total distribution of population in the country.
- » For Canadian potential travellers to Greenland, the regional distribution also follows the distribution of the population as a whole and is concentrated in Ontario and the West.

Basis: Total population (n=3,500) vs. potential travellers to Greenland from North America (n=886);
Source: Visit Greenland market study North America 2023 by NIT,

To learn 4: Potential travellers to Greenland

Socio-demographic profiles



- » Gender: With the potential Greenland travellers from North America, the proportion of men is significantly higher than that of women.
 - » 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 50-59 years old travellers is the smallest. The average age of potential travellers to Greenland from North America is 39.2 years.
 - » Size of household and children in household: The biggest group of potential travellers to Greenland live in roughly equal numbers in 2, 3 or 4 person households (24-26% each). 63% of the potential travellers live with children in the household. This is a much higher share than in the general population.
 - » Education: Regarding their formal education, we find that potential travellers from North America have a similar education structure to the population.
 - » Annual household net income: The biggest group amongst potential travellers to Greenland earns between 100,000 and 150,000 \$. The distribution of income is broadly similar to that of the population as a whole.
 - » Regional structure: The regional spread of potential travellers to Greenland in the USA shows a concentration on the east and the west coast of the country and follows the total distribution of population in the country. For Canadian potential travellers to Greenland, the regional distribution also follows the distribution of the population as a whole and is concentrated in Ontario and the West.
- » 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).

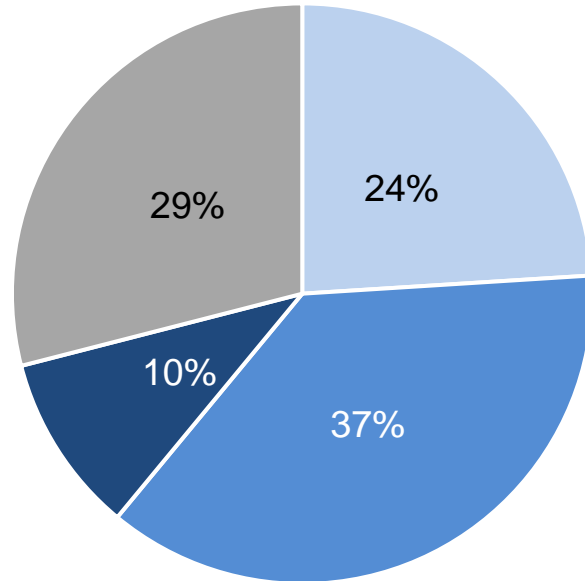
5. Segmentation of potential travellers



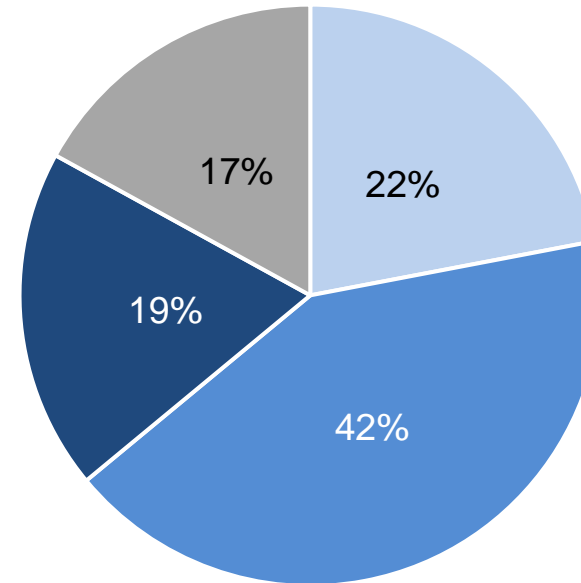
Visit Greenland adventurer segments



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/la-test-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 (29%) than for potential travellers.
- » With the potential travellers, 22% belong to the “soft adventurers”, 42% to the “immersive” and 19% 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>

*When you think about travelling in general, what would you like to experience when going on a trip?
Thinking about physical activity when travelling and experiencing the culture or nature of a destination: If you had to identify as one of the following tourist types, which one would it be?*

Basis: All respondents in North America (n=3,500), potential travellers to Greenland from North America (n=886)
Source: Visit Greenland market study North America 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 travellers from North America have a more pronounced attitude towards sustainability than the North American population in general.
- » More than two third of the potential travellers prefer their holiday to be ecologically sound and even 83% would like it to be socially acceptable. This share is a bit lower in the Northern American 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 North America (n=3,500) and potential travellers to Greenland in North America (n=886)
Source: Visit Greenland market study North America 2023 by NIT

To learn 5: Segmentation: Adventure & Sustainability




Adventurer segments:

- » 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 (29%) than for potential travellers.
- » With the potential travellers, 22% belong to the “soft adventurers”, 42% to the “immersive” and 19% to the “ultimate adventurers”.

Attitudes towards sustainability

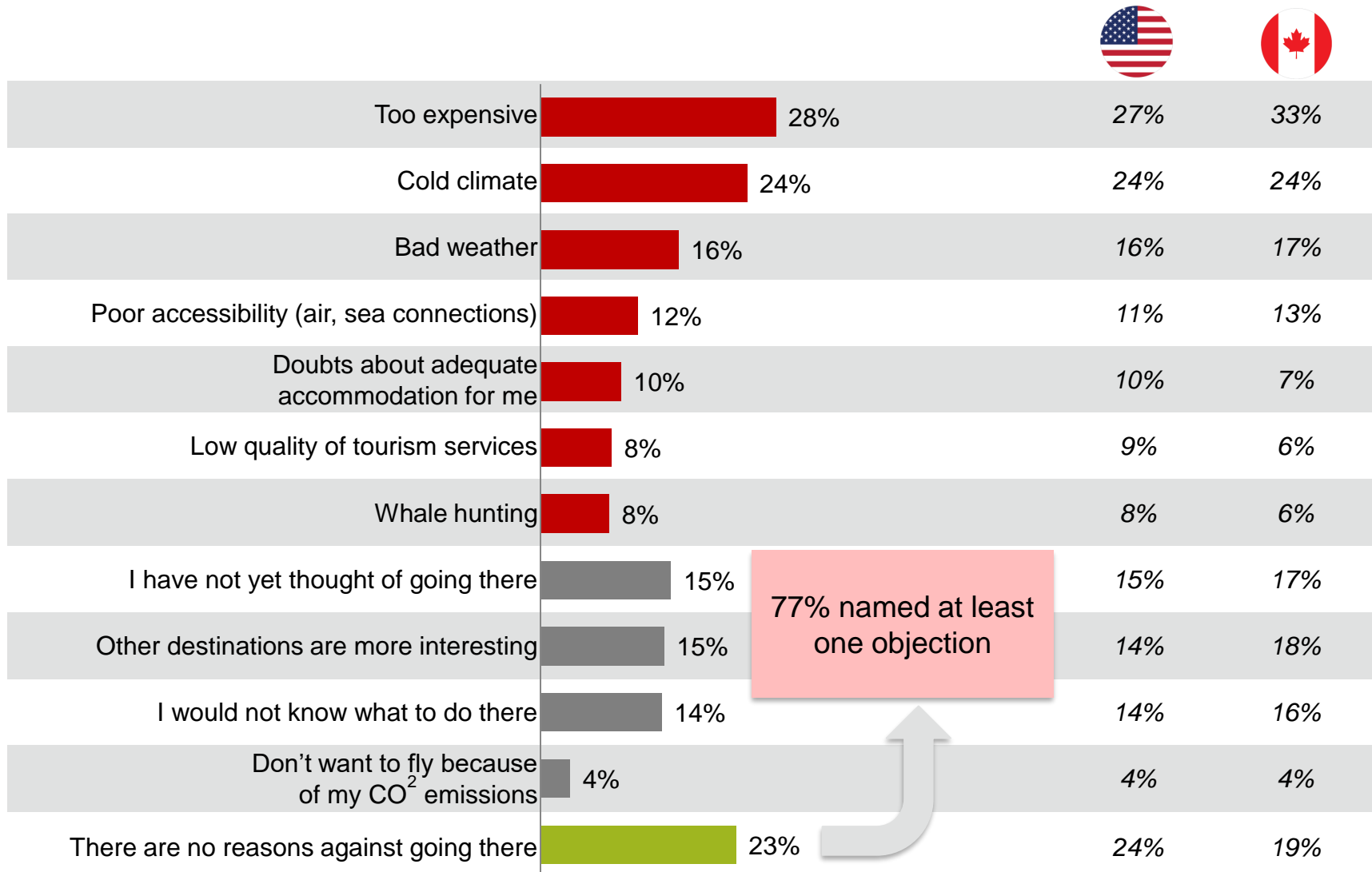
- » Potential Greenland travellers in North America have a more pronounced attitude towards sustainability than the North American population in general.
- » Nearly two thirds of the potential travellers prefer their holiday to be ecologically sound and even 83% would like it to be socially acceptable.

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



6. Reasons against travelling to Greenland

Reasons against travelling to Greenland (*population*)



- » One of the final questions in the survey examines reasons against travelling to Greenland.
- » The good news first: 23% of the North Americans have no general objections to travel to Greenland. In turn, this means that 77% 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. Bad weather and poor accessibility are also considerable reasons against travelling to Greenland.
- » 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?

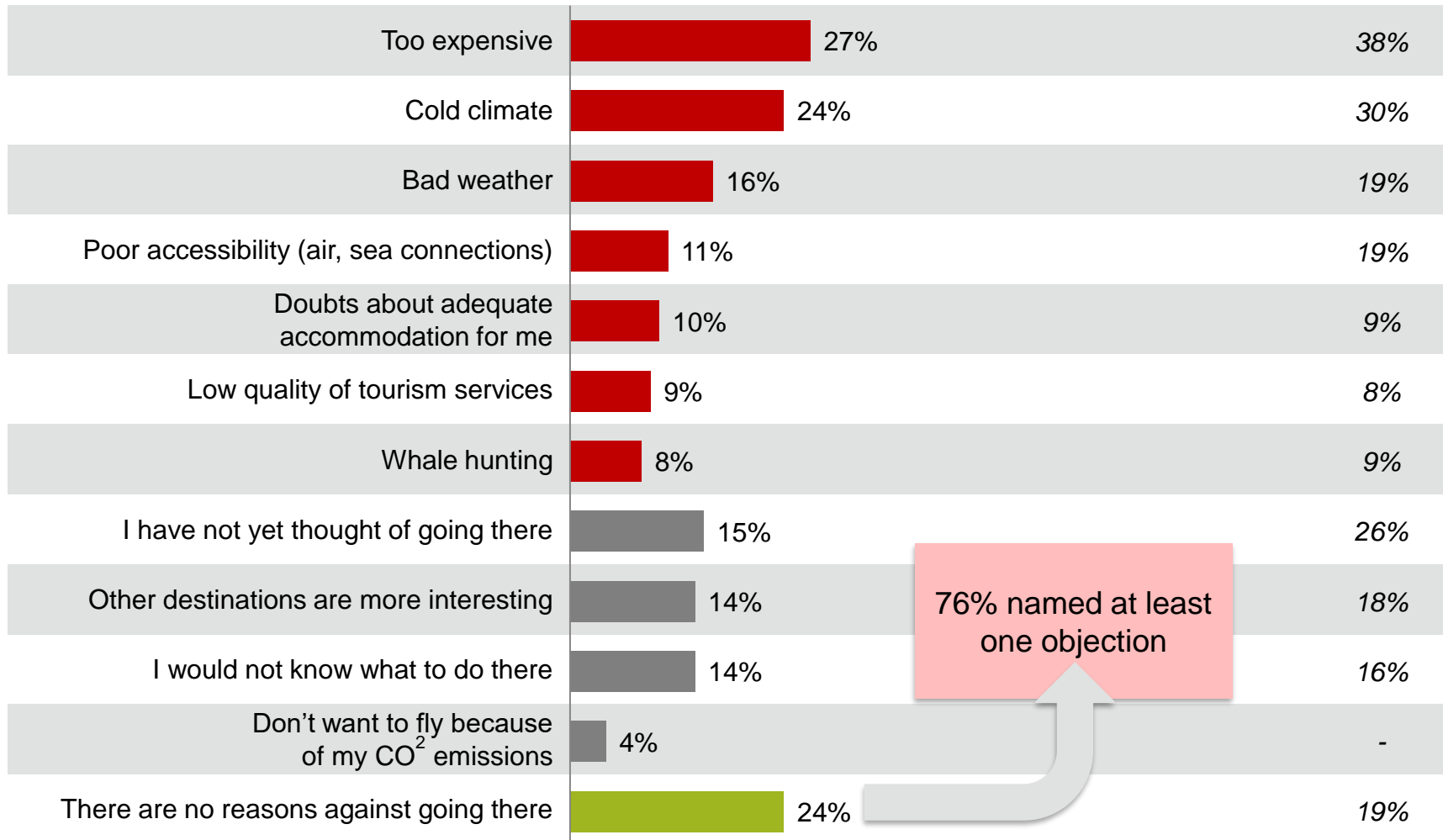
Basis: All respondents in North America (n=3,500)
Source: Visit Greenland market study North America 2023 by NIT

Reasons against travelling to Greenland (population)

– USA



2016



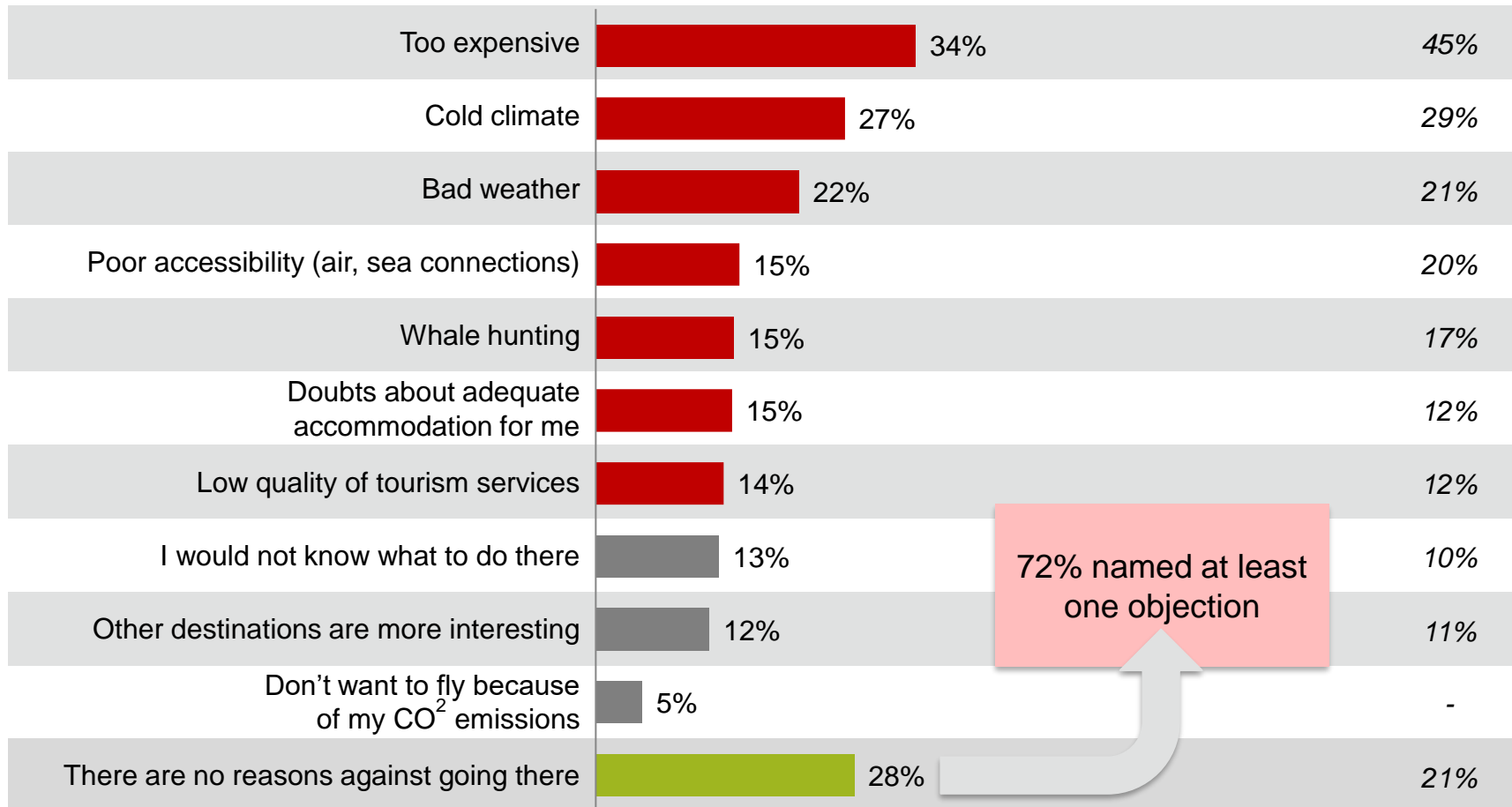
- » For the US population, the high costs are the most common reason for not travelling to Greenland, along with the cold climate. However, both reasons have become less important since 2016.
- » Poor accessibility is also a barrier for fewer people than in 2016.

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, Visit Greenland market study USA 2016 by NIT

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



2016



- » Among potential travellers to Greenland, agreement with the reasons for not travelling to Greenland is higher than among the population as a whole.
- » Particularly with regard to costs, weather and whaling, they express more concerns than the population as a whole.
- » Compared to 2016, the importance of the reasons given has hardly changed, but the figures for too expensive and poor accessibility have decreased.

What are in your opinion reasons against travelling to Greenland?

Basis: Potential travellers to Greenland in USA (n=793);
Source: Visit Greenland market study Germany 2023 by NIT,
Visit Greenland market study USA 2016 by NIT

To learn 6: Reasons against travelling to Greenland



Population:

- » 23% of the North Americans 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. Bad weather and poor accessibility are also considerable reasons against travelling to Greenland. There are also important factors in place, that are not directly linked to the tourism offer in Greenland.
- » Looking at the US population alone for a time comparison, the high costs are the most common reason for not travelling to Greenland, along with the cold climate. However, both reasons have become less important since 2016. Poor accessibility is also a barrier for fewer people than in 2016.

Potential guests:

- » Among the potential travellers in the US, 28% see no reason to not travel to Greenland. For the rest the main barrier seems to be the price. 34% of the potential travellers consider Greenland “too expensive”. Here figures are much higher than in the population. Three other important barriers are the cold climate, poor accessibility and bad weather.
- » Compared to 2016, the importance of the reasons given has hardly changed, but the figures for too expensive and poor accessibility have decreased

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

Trends since 2016/2017/2018:

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

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

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

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

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

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

Summary & main conclusions: DIFFERENCES of markets



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



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



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



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



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

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



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