

Positioning and potentials of Greenland on the SCANDINAVIAN 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 on this market.
- » The studies followed the same methodological approach as previous studies 2016 in Scandinavia, 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 market reports above in a comparative way.
- » **This document is the market report about the SCANDINAVIAN market.**
- » The results are based on 6,000 online interviews that were conducted in Scandinavia (2,000 in Denmark, Sweden and Norway) by our partner Dynata in January 2023. The results are representative for the population aged 18-75 years in the three countries. The report shows results for Scandinavia (by weighting the country results according to their population size) as well as detailed comparisons between Denmark, Sweden and Norway.





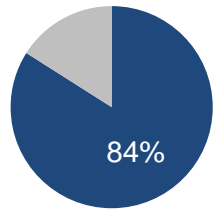
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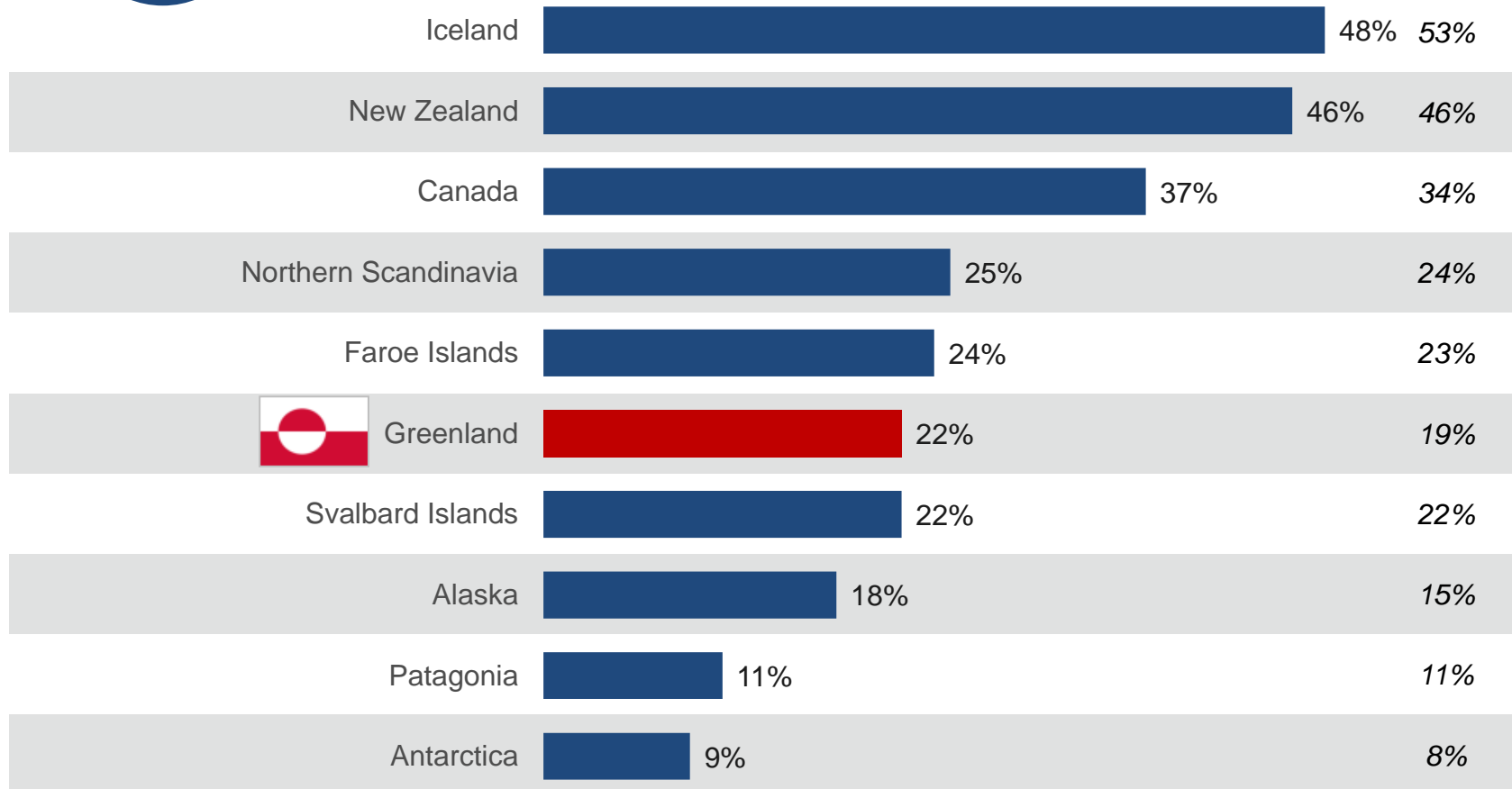
1. Interest to travel to Greenland & competitors

General interest to travel to remote destinations in the Scandinavian population



84% of the Scandinavian population would like to go to at least one of these 10 remote destinations in the next 5 years

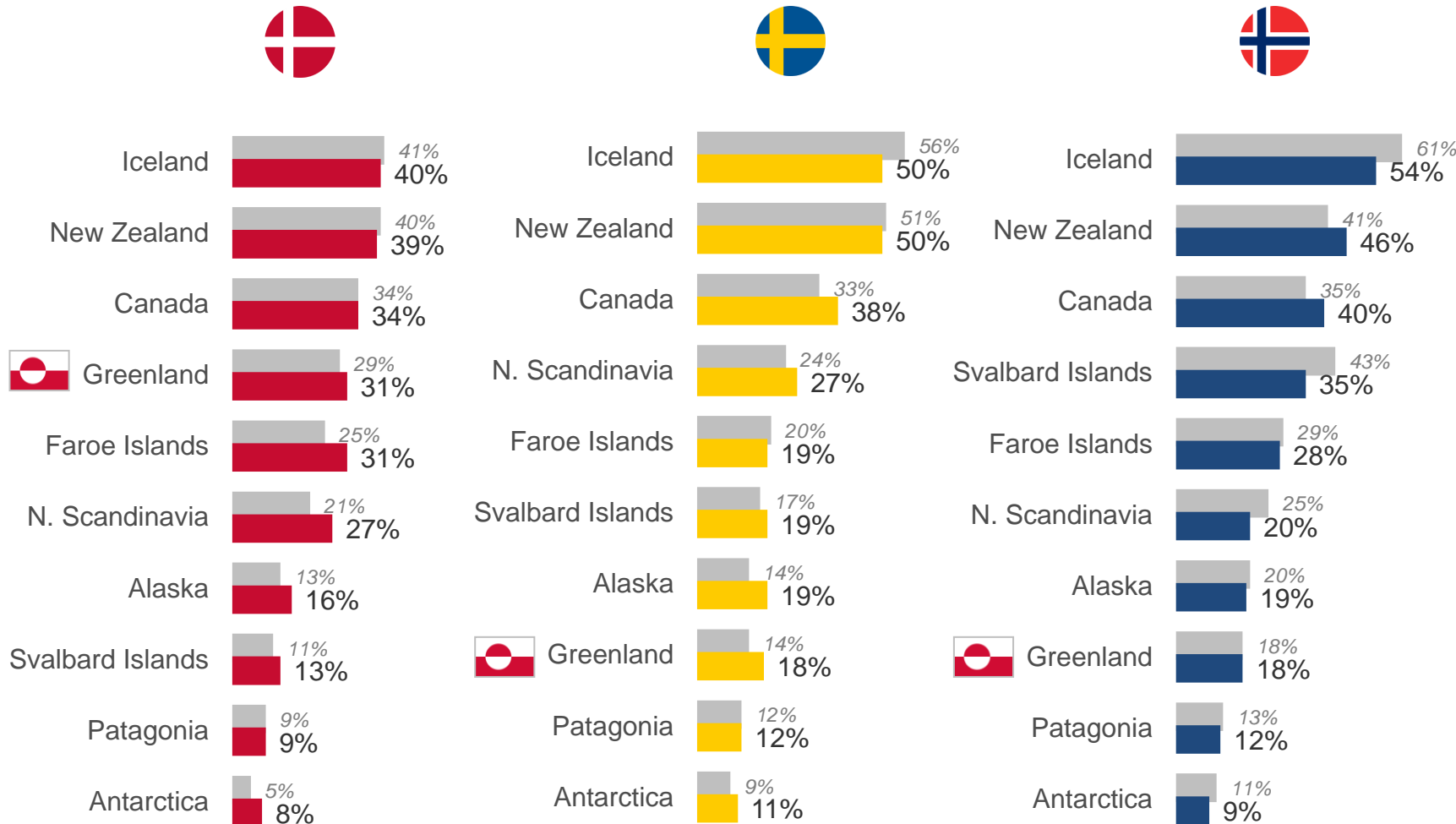
2018



- » 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?”
- » 84% of the Scandinavian population would like to go to at least one of these 10 remote destinations in the next 5 years.
- » Iceland is the most popular destination in terms of general interest; New Zealand and Canada follow.
- » 22% would like to go to Greenland.
- » Compared to 2018 interest to travel to Greenland increased by 3%-pts.

Which of these destinations would you like to visit within the next 5 years?
 Basis: All respondents in Scandinavia (DK, SE, NO) (n=6,000)
 Source: Visit Greenland market study Scandinavia 2023 by NIT, Visit Greenland/Air Greenland market study Scandinavia 2018 by NIT

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



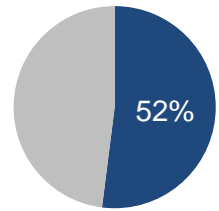
- » There are similarities, but also differences between Denmark, Sweden and Norway.
- » In all countries, Iceland is the most popular destination, also New Zealand and Canada rank very high.
- » The share of people interested to travel to Greenland is highest in Denmark (31%), and identical in Sweden and Norway (18%)
- » It is obvious that there is a certain preference for remote destinations with a special connection in each market:
Denmark: Greenland, Faroe Islands
Sweden: Northern Scandinavia
Norway: Svalbard Islands
- » Compared to 2018 interest to travel to Greenland has increased in Denmark and Sweden but remained constant in Norway.

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

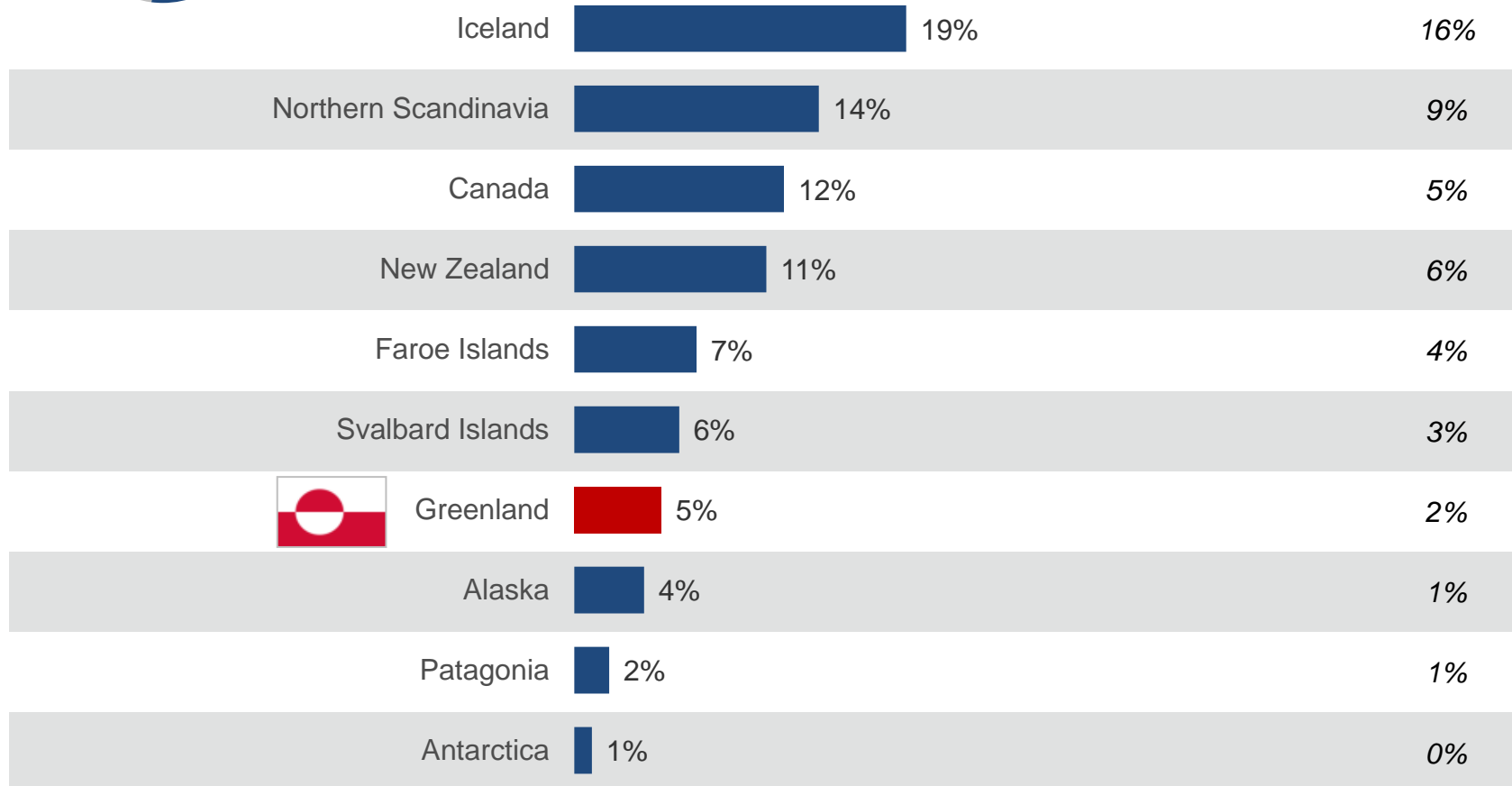
Basis: All respondents in Denmark (n=2,000), Sweden (n=2,000), Norway (n=2,000);

Source: Visit Greenland market study Scandinavia 2023 by NIT, Visit Greenland/Air Greenland market study Scandinavia 2018 by NIT

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



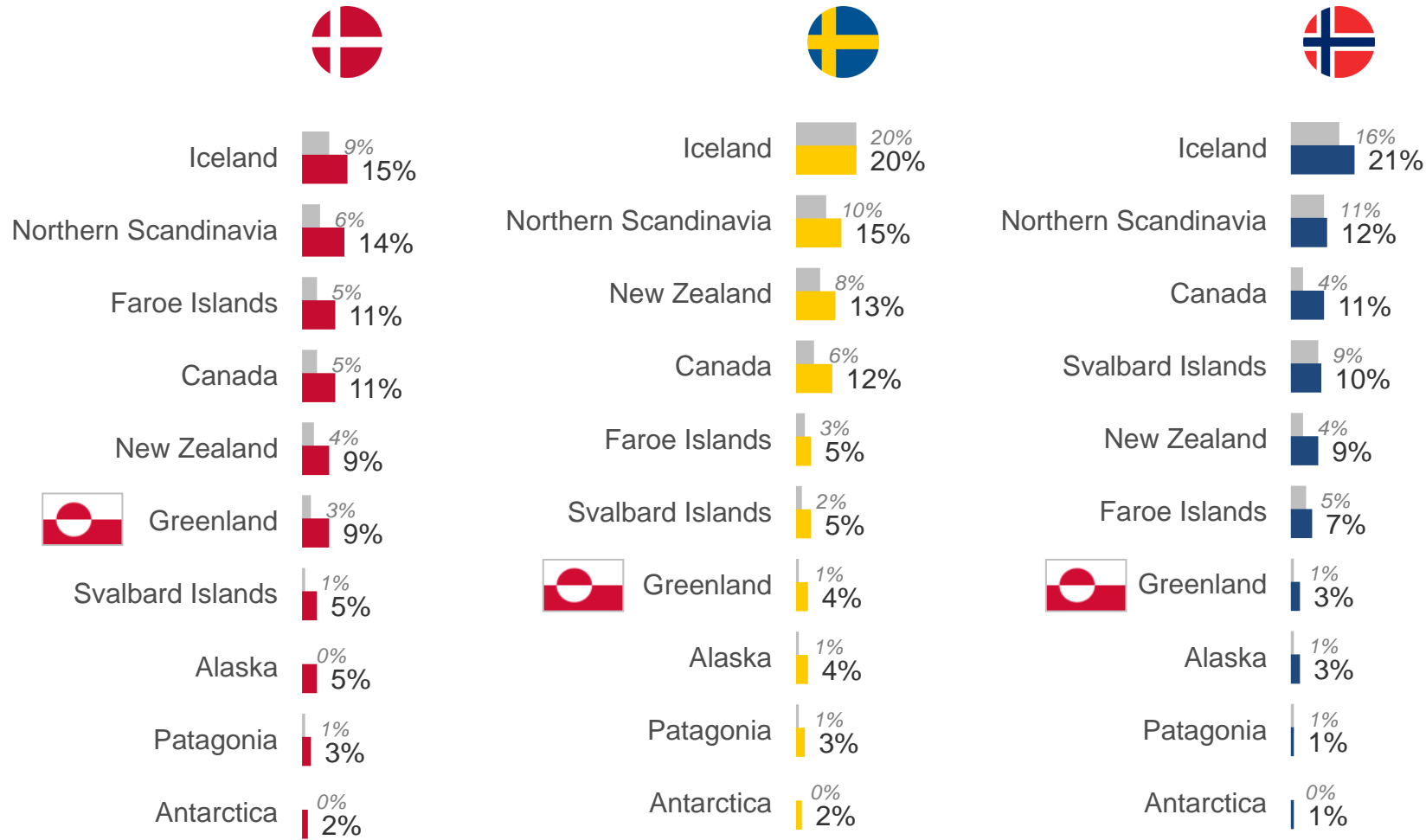
52% of the Scandinavian population are almost definitely planning to visit at least one of these 10 remote destinations within the next 2 years



- » 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?”
- » 52% of the Scandinavian population are almost definitely planning to visit at least one of these 10 remote destinations within the next 2 years.
- » Iceland is the most popular destination in terms of this “hard potential”, Northern Scandinavia and Canada follow.
- » 5% are almost definitely planning to visit Greenland.
- » Compared to 2018 the hard potential for Greenland has more than doubled.

And which of these travel destinations are you almost definitely planning to visit within the next 2 years?
 Basis: All respondents in Scandinavia (n=6,000)
 Source: Visit Greenland market study Scandinavia 2023 by NIT; Visit Greenland/Air Greenland market study Scandinavia 2018 by NIT

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






- » There are similarities but also differences between Denmark, Sweden and Norway regarding the “hard potential” to travel to remote destinations; in all markets Iceland is the most popular destination before Northern Scandinavia.
- » The share of people almost definitely planning to travel to Greenland varies between 9% in Denmark, 4% in Sweden and 3% in Norway.
- » The “special connections” between each market and specific destinations that was observed in the total interest to travel there is less obvious with the “hard potential”.
- » Compared to 2018, the hard potential has increased in all three markets for most of the remote destinations. The hard potential for Greenland increased the most in Denmark (+6%pts).

Q: And which of these travel destinations are you almost definitely planning to visit within the next 2 years?
 Basis: All respondents in Denmark (n=2,000), Sweden (n=2,000), Norway (n=2,000); Source: Visit Greenland market study Scandinavia 2023 by NIT, Visit Greenland/Air Greenland market study Scandinavia 2018 by NIT

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




FUNNEL	Definition	SCANDINAVIA			
total	Scandinavian population 18-75 years old	15.4 million	4.2 million	7.3 million	3.9 million
total potential	"like to travel to Greenland within the next 5 years"	3.4 million	1.3 million	1.3 million	0.7 million
'hard' potential/planners	"almost definitely planning to visit Greenland within the next 2 years"	790,000	360,000	310,000	120,000
visitors	Plane and cruise passengers to Greenland in 2019	32,238 plane: 31,137 cruise: 1,101	29,767 plane: 29,029 cruise: 738	1,039 plane: 910 cruise: 129	1,356 plane: 1,122 cruise: 234

- » The volume funnel puts the reported market shares in relation to the actual market size and delivers concrete volume figures.
- » It shows that regarding the total potential, Denmark and Sweden are on one level with 1.3 million each, despite Denmark having a much smaller population than Sweden.
- » The hard potential and the actual visitors provide with you a baseline to estimate what future volumes of guests to expect from each of the markets.
- » Based on this, Denmark will probably stay by far the premier market for Greenland in Scandinavia but Sweden and Norway are also interesting.

Basis: All respondents in Scandinavia (DK, SE, NO) (n=6,000), in Denmark (n=2000), Sweden (n=2000), Norway (n=2000); Source: Visit Greenland market study Scandinavia 2023 by NIT; Visit Greenland/Air Greenland market study Scandinavia 2018 by NIT

Competition in SCANDINAVIA: 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	70%	31%
New Zealand	59%	16%
Canada	55%	19%
Faroe Islands	54%	17%
Svalbard Islands	44%	14%
Northern Scandinavia	40%	21%
Alaska	40%	10%
Antarctica	27%	6%
Patagonia	25%	7%

- » In Scandinavia, potential travellers to Greenland are also interested in 5.1 other remote destinations in our question set.
- » The fiercest competitor is by far Iceland. 70% of the potential Greenland travellers also want to go there.
- » It is followed by New Zealand, Canada, Faroe Islands and Svalbard Islands.
- » 24% of the total potential Greenland travellers are almost definitely planning to visit Greenland in the next 2 years. Even more, 31%, are almost definitely planning to visit Iceland in the next 2 years.

Basis: Potential travellers to Greenland in Scandinavia (n=1,305)
 Source: Visit Greenland market study Scandinavia 2023 by NIT

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




 Potential travellers to Greenland would also like to visit within the next 5 years	... are almost definitely planning to visit within the next 2 years
Greenland	100%	28%
Iceland	66%	25%
Faroe Islands	54%	20%
New Zealand	52%	12%
Canada	48%	16%
Northern Scandinavia	40%	20%
Alaska	30%	11%
Svalbard Islands	27%	11%
Patagonia	19%	8%
Antarctica	17%	5%

- » In Denmark, potential travellers to Greenland are also interested in 4.5 other remote destinations in our question set.
- » The fiercest competitor in Denmark is by far Iceland. 66% of the potential Greenland travellers also want to go there.
- » It is followed by Faroe Islands, New Zealand, Canada, and Northern Scandinavia.
- » 28% of the total potential Greenland travellers from Denmark are almost definitely planning to visit Greenland in the next 2 years. Looking further into the details for the other destinations, it is a bit less likely that potential Greenland travellers end up in Iceland before they actually travel to Greenland.

Basis: Potential travellers to Greenland in Denmark (n=619)
Source: Visit Greenland market study Scandinavia 2023 by NIT

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




 Potential travellers to Greenland would also like to visit within the next 5 years	... are almost definitely planning to visit within the next 2 years
Greenland	100%	23%
Iceland	73%	36%
New Zealand	66%	21%
Canada	60%	24%
Faroe Islands	51%	16%
Svalbard Islands	48%	13%
Alaska	48%	11%
Northern Scandinavia	43%	23%
Antarctica	36%	9%
Patagonia	29%	8%

- » In Sweden, potential travellers to Greenland are also interested in 5.5 other remote destinations in our question set.
- » The fiercest competitor in Sweden is by far Iceland. 73% of the potential Greenland travellers also want to go there.
- » It is followed by New Zealand, Canada and Faroe Islands.
- » 23% of the total potential Greenland travellers from Sweden are almost definitely planning to visit Greenland in the next 2 years. Looking further into the details, there is a high likelihood that the potential Greenland travellers end up in Iceland (and to a lesser extent in Canada and Northern Scandinavia) before they actually travel to Greenland.

Basis: Potential travellers to Greenland in Sweden (n=367)
Source: Visit Greenland market study Scandinavia 2023 by NIT

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



 Potential travellers to Greenland would also like to visit within the next 5 years	... are almost definitely planning to visit within the next 2 years
Greenland	100%	18%
Iceland	72%	35%
Svalbard Islands	65%	22%
New Zealand	61%	13%
Faroe Islands	59%	15%
Canada	58%	15%
Alaska	42%	6%
Northern Scandinavia	34%	18%
Antarctica	28%	4%
Patagonia	26%	4%

- » In Norway, potential travellers to Greenland are also interested in 5.5 other remote destinations in our question set.
- » The fiercest competitor in Norway is by far Iceland. 72% of the potential Greenland travellers also want to go there.
- » It is followed by Svalbard Islands, New Zealand, Faroe Islands and Canada.
- » 18% of the total potential Greenland travellers from Norway are almost definitely planning to visit Greenland in the next 2 years. Looking further into the details, there is a high likelihood that the potential Greenland travellers end up in Iceland or Svalbard Islands (and to a lesser extent in Northern Scandinavia) before they actually travel to Greenland.

Basis: Potential travellers to Greenland in Norway (n=364)
Source: Visit Greenland market study Scandinavia 2023 by NIT

To learn 1: Interest to travel to Greenland & competitors



Interest to travel to remote destinations

- » 84% of the Scandinavian population would like to go to at least one of the 10 remote destinations covered in the questionnaire in the next 5 years. 52% 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, New Zealand, Canada and Northern Scandinavia follow.
- » Iceland, Northern Scandinavia and Canada are also the most popular destinations in terms of the “hard potential”.
- » 22% of the Scandinavians would like to go to Greenland and 5% are almost definitely planning to go there.
- » It is obvious that there is a certain preference for remote destinations with a special connection in each market: Denmark: Greenland, Faroe Islands; Norway: Svalbard Islands; Sweden: Arctic Scandinavia
- » Compared to 2018 the “general” potential of the surveyed countries has increased. Interest to travel to Greenland increased by 3%-pts since 2018.

Competitive situation in Scandinavia

- » A look at the competitive situation of Greenland shows that in Scandinavia, potential travellers to Greenland are also interested in 5.1 other remote destinations in our question set. The figure differs between 4.5 competitors in Denmark and 5.5 in Norway and Sweden. This shows that Greenland is facing a fierce competition with the other destinations in our set of remote destinations, a bit less in Denmark, a bit more in the other two markets.
- » The fiercest competitor is by far Iceland. 70% of the potential Greenland travellers also want to go there. It is followed by New Zealand, Canada, Faroe Islands and Svalbard Islands.
- » Looking further into the details, there are interesting differences in Denmark, Sweden and Norway which are worthwhile to pay attention to.

- » Compared with the actual demand, there is a huge interest to travel to Greenland in Scandinavia. This is where destination marketing comes in. The following part of the report should help with strategic marketing decisions.
- » When looking at the comparison over time and the development since 2018, it shows that the potential for all the survey countries has increased and the share of those Scandinavians interested in going to Greenland within the next 5 years also increased since 2018.
- » The results also show that Greenland is in fierce competition with other (remote) destinations around the world.
- » Even if it makes much sense to treat Scandinavia as one market, it is interesting to know the differences between the three countries, too.

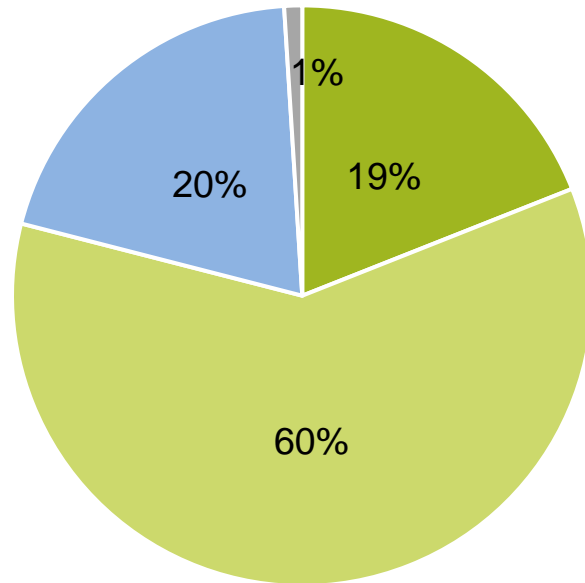


2. Image of Greenland as a holiday destination

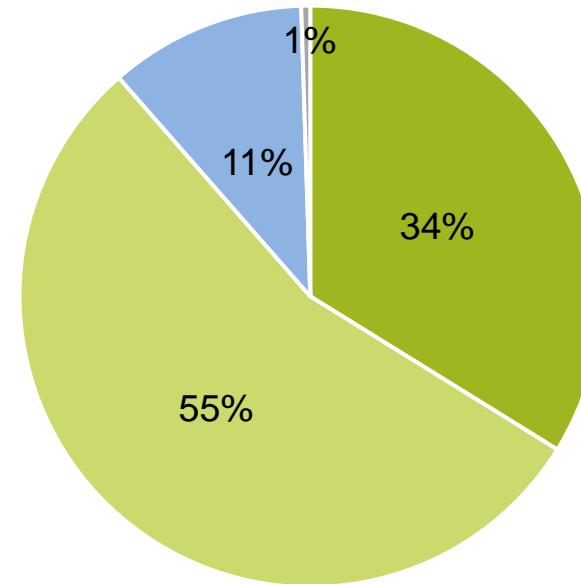
Knowledge of Greenland in the Scandinavian population vs. potential travellers to Greenland



population



Potential travellers to Greenland

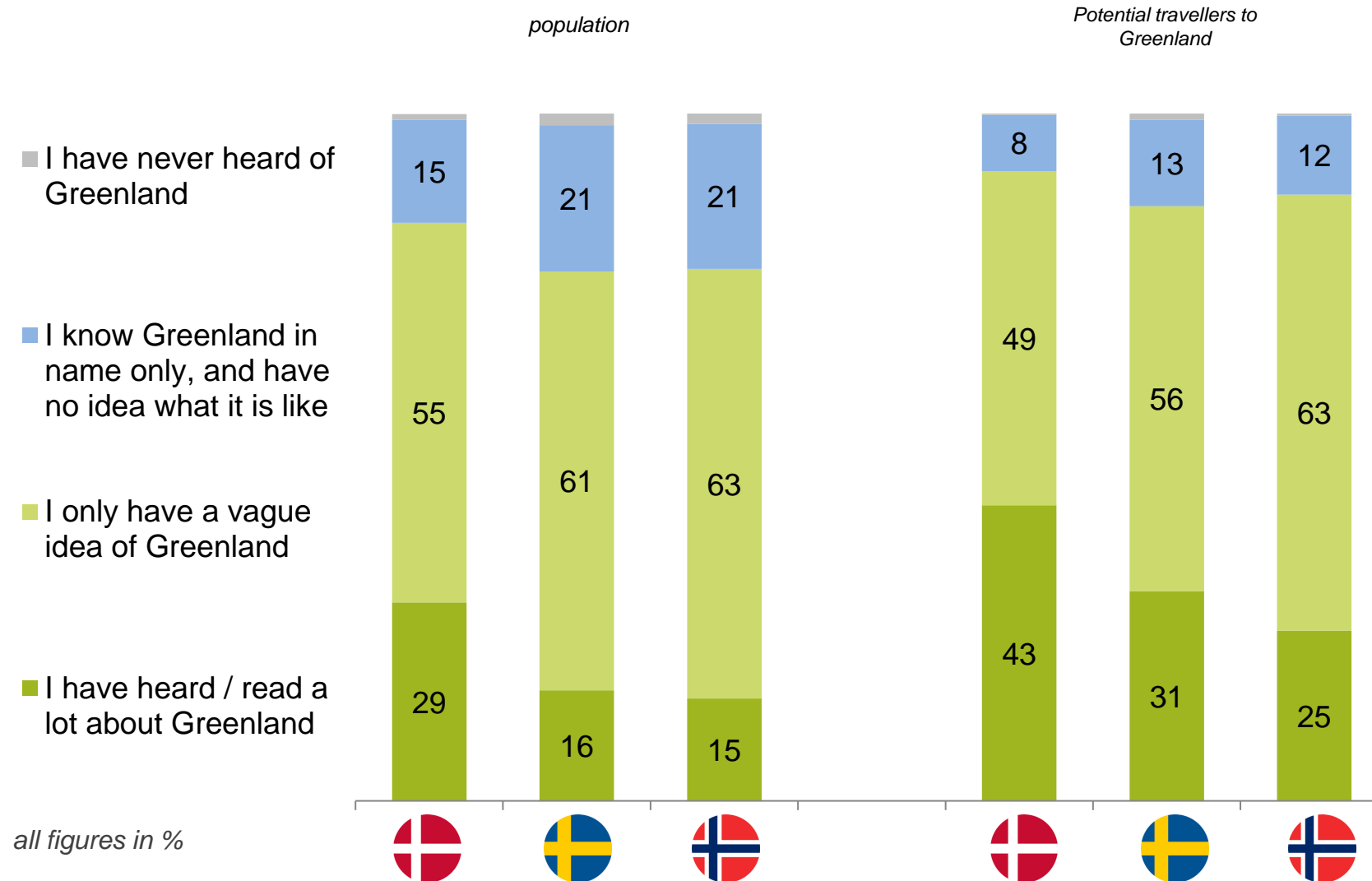


I have heard/read a lot about Greenland.
I only have a vague idea about Greenland.
I know Greenland in name only, and have no idea what it is like.
I have never heard of Greenland.

- » Those Scandinavians who have not been to Greenland before where asked about their knowledge of Greenland as a travel destination.
- » 19% claim to have heard or read a lot about Greenland and can therefore be considered has having high knowledge about the country.
- » More than half (60%) have only a vague idea of Greenland and a fifth (20%) knows the country only by name. A very small minority of 1% has never heard of Greenland.
- » Looking at the potential travellers to Greenland, the share of those knowing a lot about Greenland is much higher than in the general population.

How well do you know Greenland as a travel destination?
 Basis: Respondents, in Scandinavia who have not been previously in Greenland (population: n=5,577; potential travellers: n=1,082)
 Source: Visit Greenland market study Scandinavia 2023 by NIT

How well do the Scandinavian markets know Greenland?

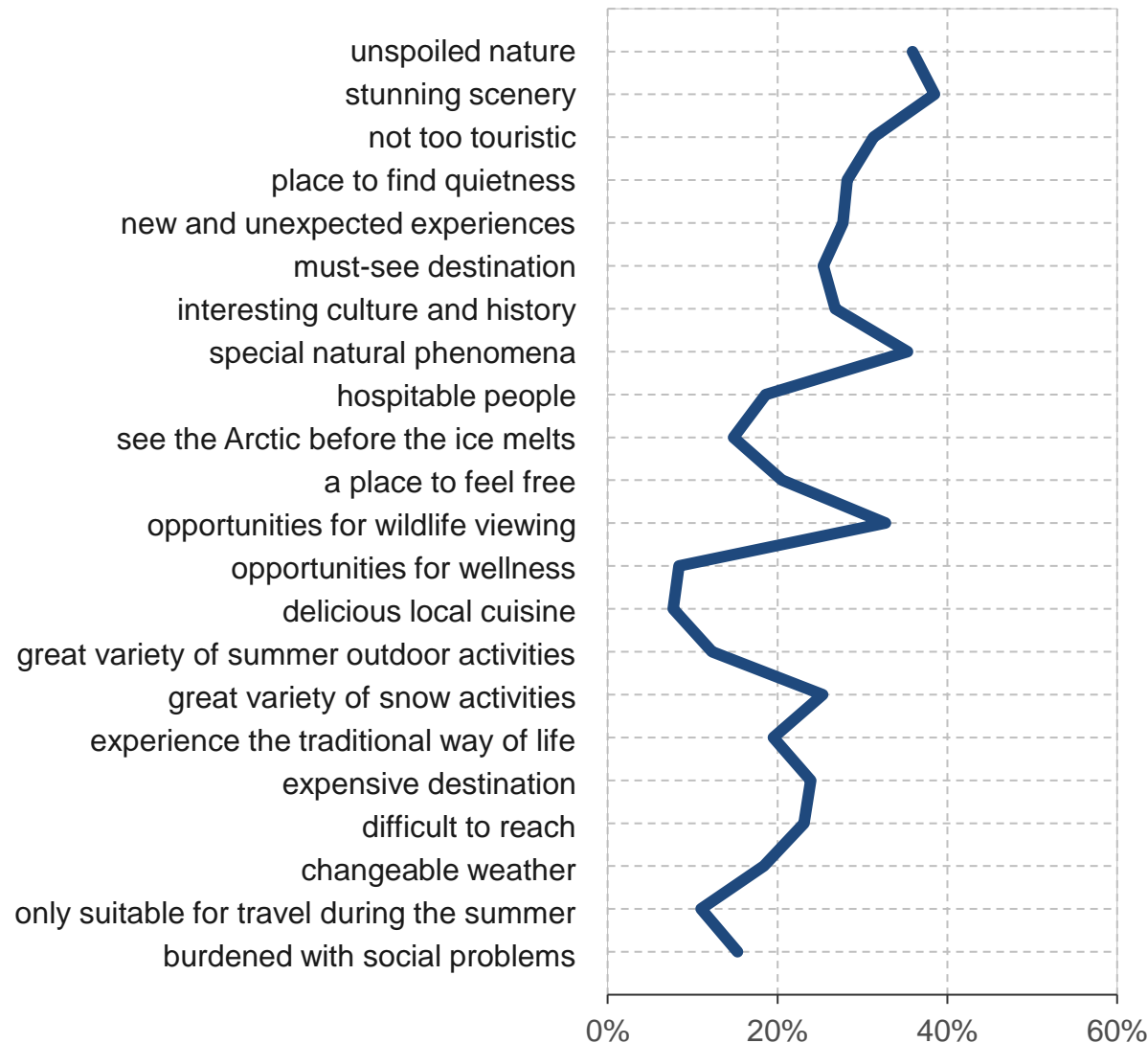


all figures in %

- » There are also some differences between the three Scandinavian countries when it comes to the knowledge about Greenland.
- » Greenland is by far best known in Denmark.
- » Between Sweden and Norway, there are only small differences.

How well do you know Greenland as a travel destination?
 Basis: Respondents, in Scandinavia who have not been previously in Greenland (population: DK n=1,716; SE n=1,901; NO n=1,935; potential travellers: DK n=463; SE: n=318; NO n=331)
 Source: Visit Greenland market study Scandinavia 2023 by NIT

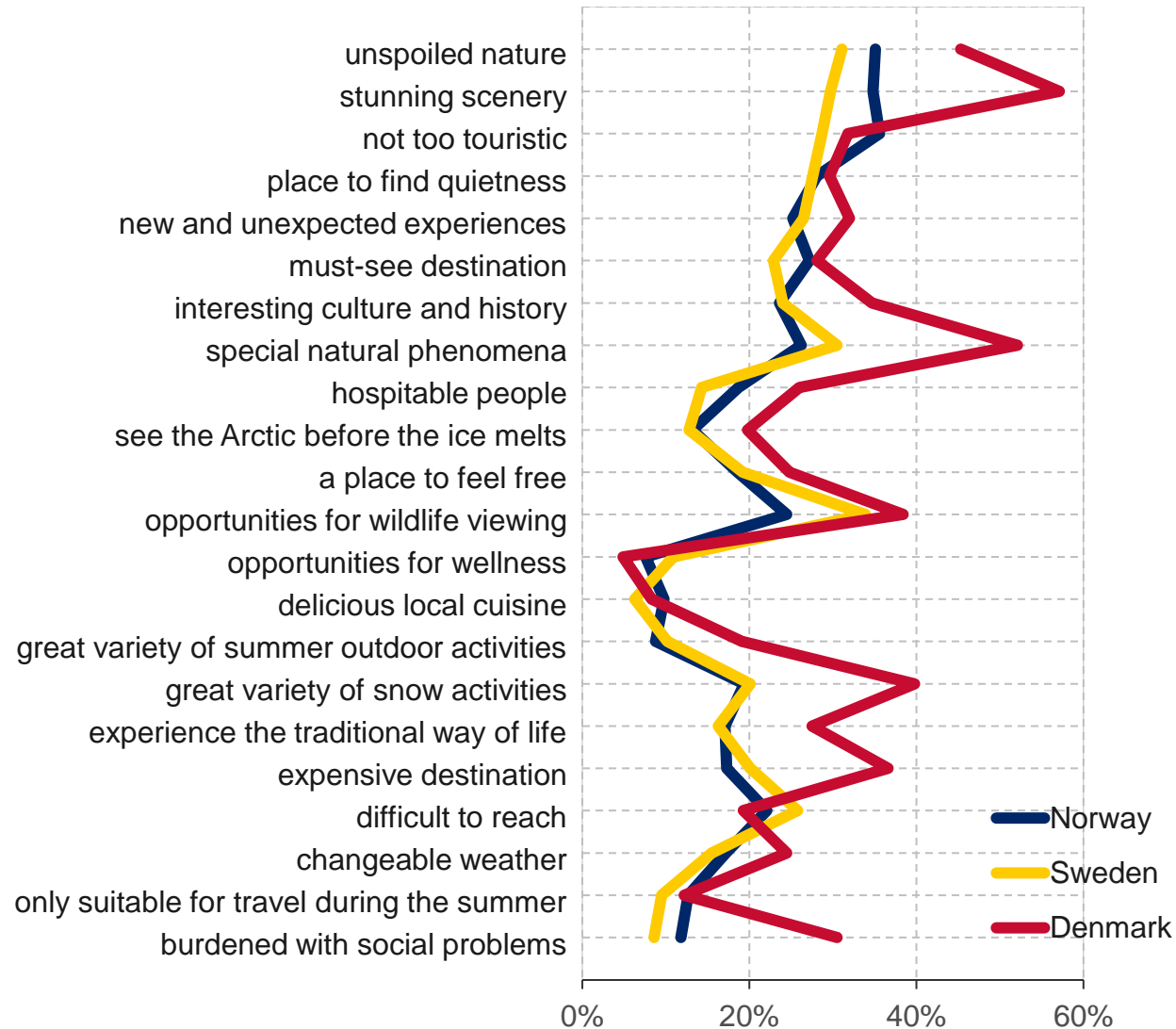
Image of Greenland in the Scandinavian population



- » The **key image factors** of Greenland in the Scandinavian population are:
 - » Stunning scenery (39%)
 - » Unspoiled nature (36%)
 - » Natural phenomena (35%)
 - » Opportunities for wildlife viewing (33%)
 - » Not too touristic (31%)
- » Greenland is **not famous** for:
 - » Delicious local cuisine (8%)
 - » Opportunities for wellness (8%)
 - » Only suitable for travelling in the summer (11%)
- » Persons in Scandinavia name on average 5.0 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 Scandinavia (n=6,000)
 Source: Visit Greenland market study Scandinavia 2023 by NIT

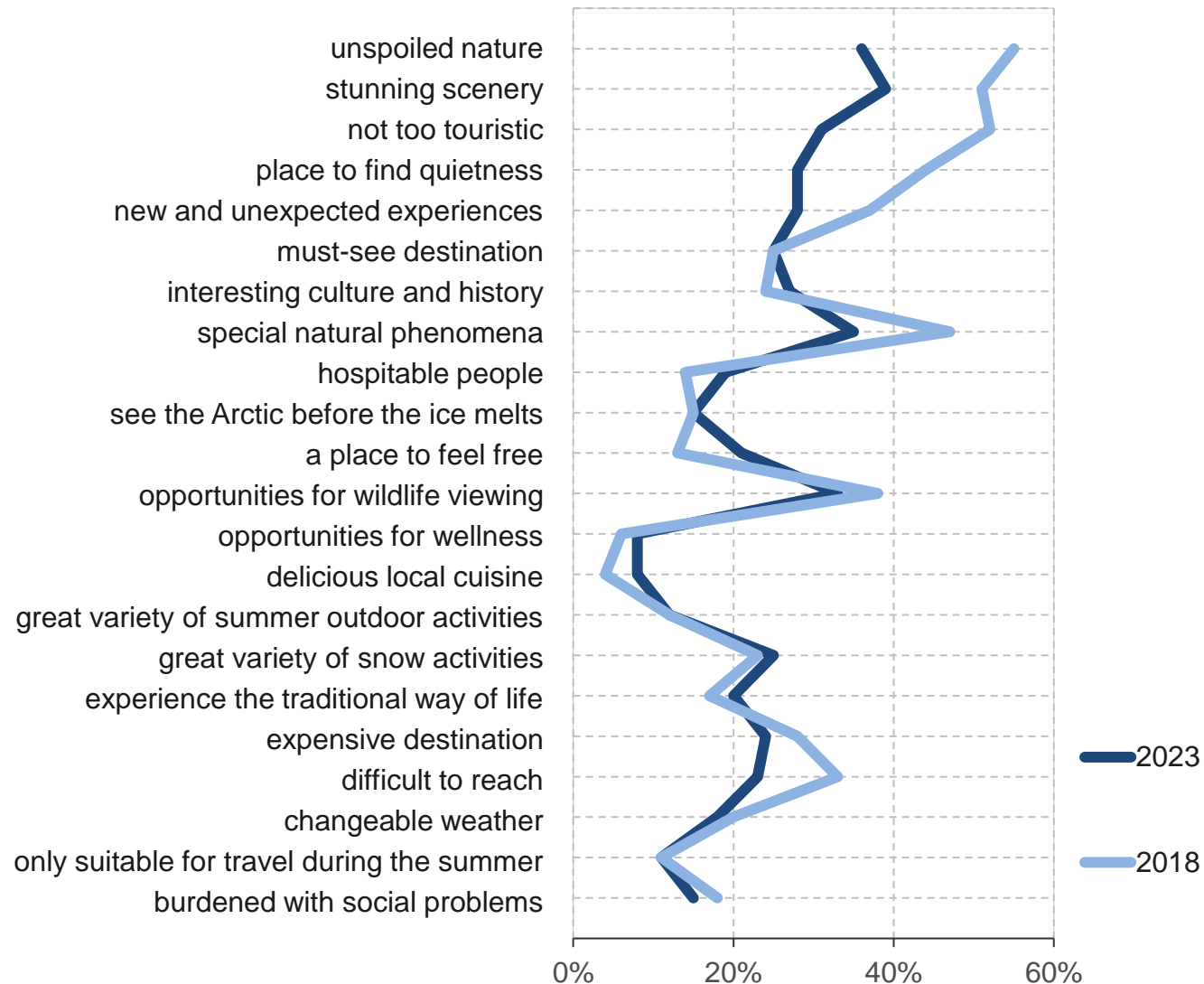
Image of Greenland in Denmark, Sweden, Norway



- » In almost all characteristics, the Denmark figures are high above those of Sweden and Norway. However, the ranking is rather similar in all three markets.
- » More characteristic with the Danish than the Swedish are:
 - » Stunning scenery (+27%-pts.)
 - » Social problems (+22%-pts.)
 - » Natural phenomena (+21%-pts.)
 - » Snow activities (+20%-pts.)
- » More characteristic with the Danish than the Norwegians are:
 - » Natural phenomena (+26%-pts.)
 - » Stunning scenery (+22%-pts.)
 - » Snow activities (+20%-pts.)
- » The images in Sweden and Norway are quite similar with each other.
- » Slightly more characteristic with the Swedish are wildlife viewing, are natural phenomena and difficult to reach; more characteristic with the Norwegians are not too touristic and stunning scenery.

Please tell me which of these characteristics do you think particularly apply to Greenland?
 Basis: All respondents in Denmark (n=2000), Sweden (n=2000), Norway (n=2000); Source: Visit Greenland market study Scandinavia 2023 by NIT

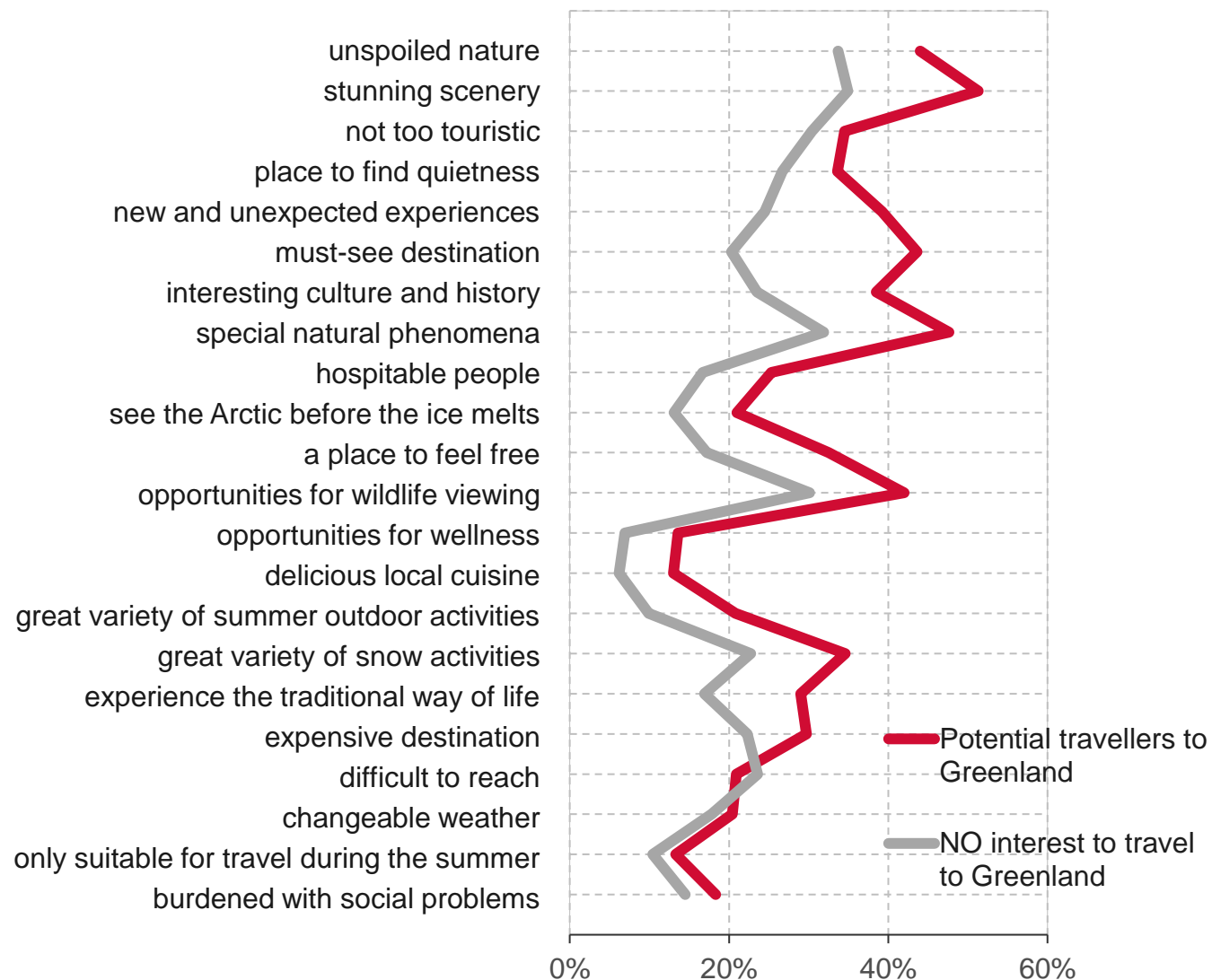
Image of Greenland in the Scandinavian population: 2023 and 2018



- » Comparing the current image of Greenland with the image of 2018 shows some changes over time. Overall, most numbers decreased in the last 5 years.
- » The **most striking differences** between the image of Greenland in 2023 and 2018 can be found here:
 - » Not too touristic (-21%-pts.)
 - » Unspoiled nature (-19%-pts.)
 - » Quietness (-16%-pts.)
 - » Stunning scenery (-12%-pts.)
 - » Special natural phenomena (-12%-pts.)
 - » Difficult to reach (-10%-pts.)
- » The only characteristic, where the Scandinavian population shows slightly higher figures in 2023 are “a place to feel free” (+8%-pts.) and “hospitable people” (+5%-pts.).

Please tell me which of these characteristics do you think particularly apply to Greenland?
 Basis: All respondents in Scandinavia (n=6,000)
 Source: Visit Greenland market study Scandinavia 2023 by NIT; Visit Greenland/Air Greenland market study Scandinavia 2018 by NIT

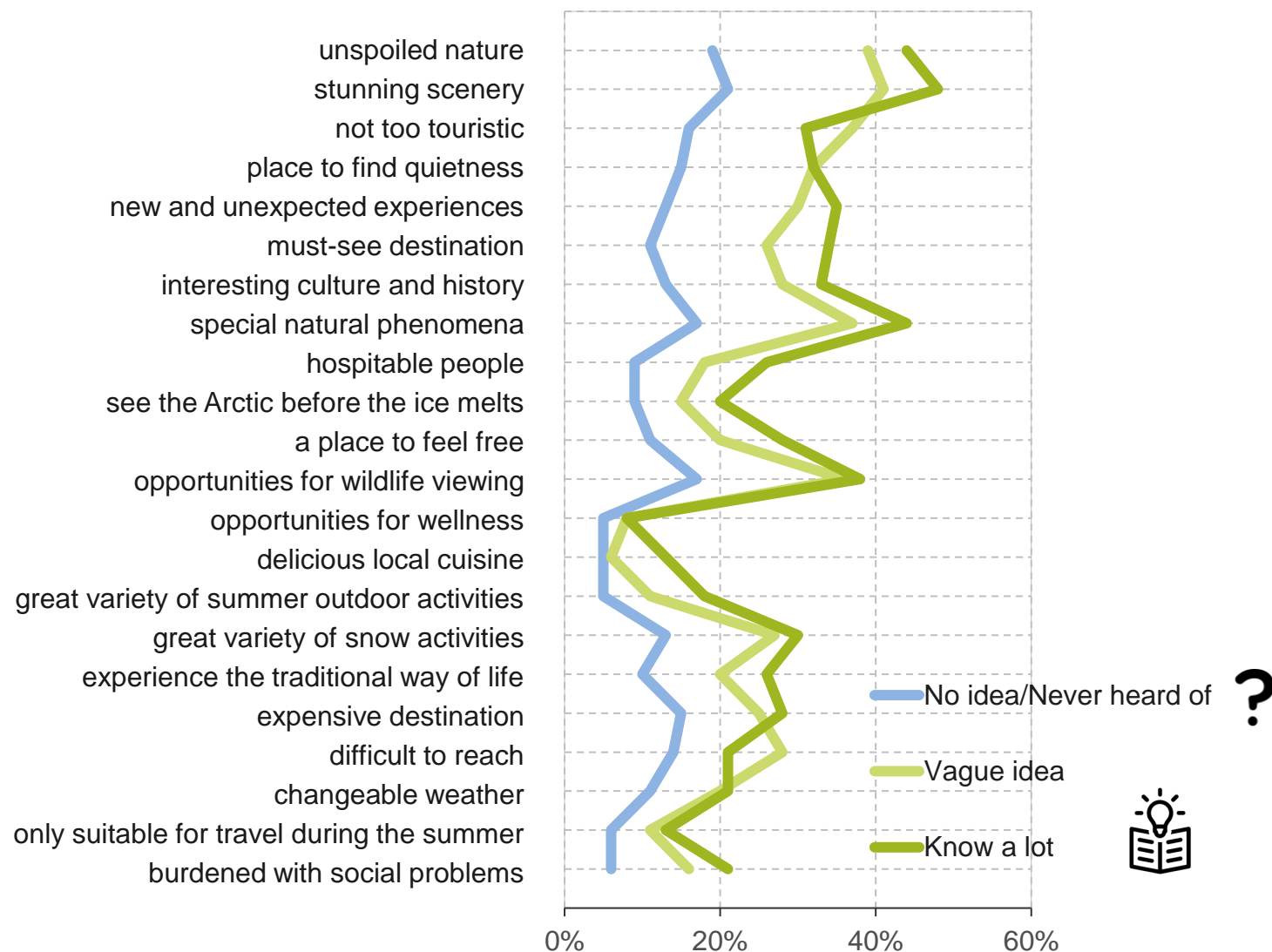
Image of Greenland in the Scandinavian population: With/without interest to travel to Greenland



- » The **most striking differences** of persons WITH interest to travel to Greenland compared to persons WITHOUT interest can be found here:
 - » Must-see destination (+23%-pts.)
 - » Stunning scenery (+16%-pts.)
 - » Natural phenomena (+16%-pts.)
 - » Unexpected experiences (+15%-pts.)
 - » A place to feel free (+15%-pts.)
- » The only characteristic, where persons with NO interest show higher figures is “difficult to reach” (+3%-pts.)
- » Persons WITH interest to travel to Greenland name on average 6.7 of the 21 characteristics in the question. Persons with NO interest name 4.5 characteristics.

Please tell me which of these characteristics do you think particularly apply to Greenland?
 Basis: Respondents in Scandinavia WITH interest to travel to Greenland (n=1,305) and WITHOUT interest to travel to Greenland (n=2,523)
 Source: Visit Greenland market study Scandinavia 2023 by NIT

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

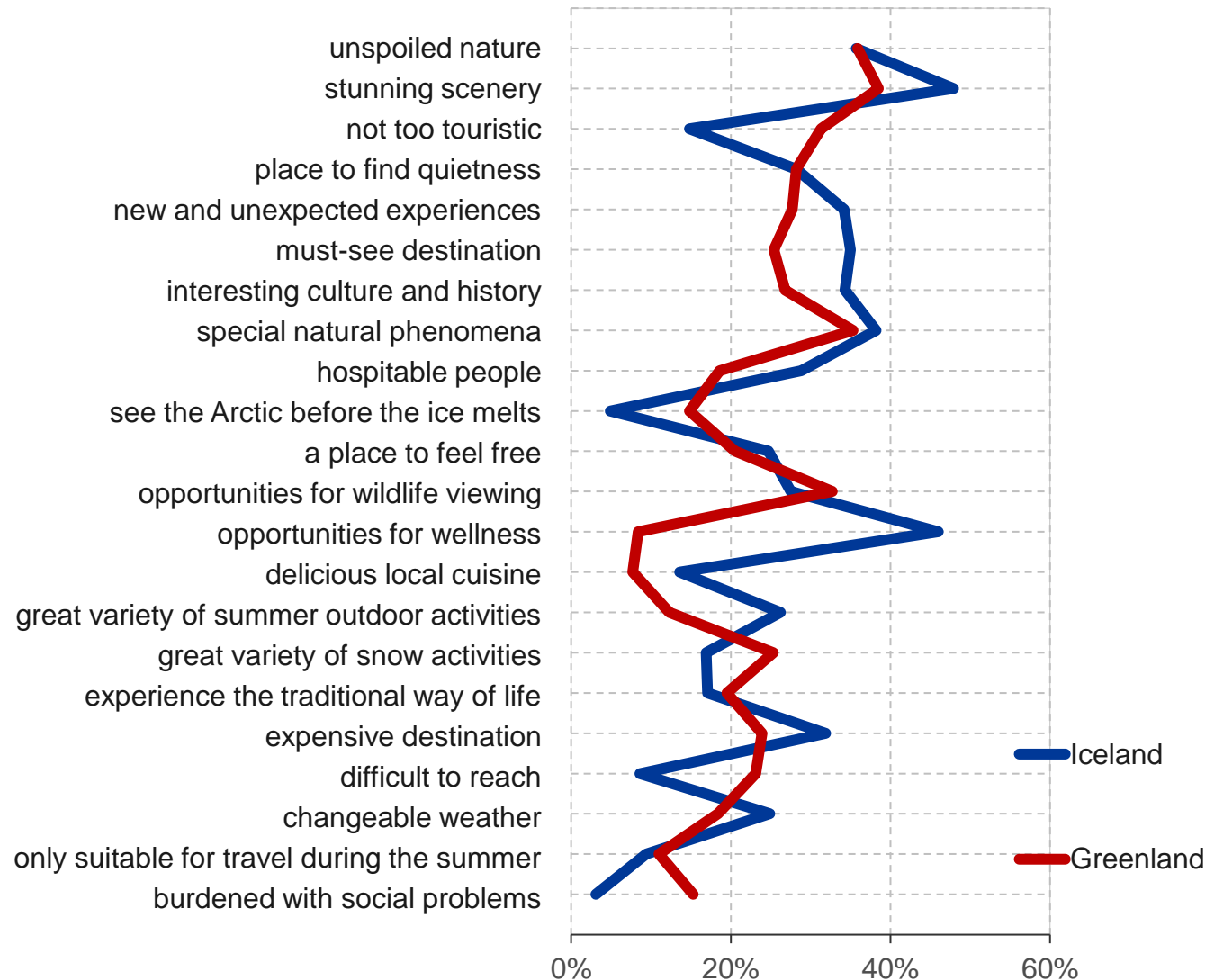


- » Higher knowledge leads to higher image figures of most nature and cultural topics such as (comparison “know a lot” vs. “no idea”):
 - » Stunning scenery, natural phenomena (+27%-pts.), unspoiled nature (+25%-pts.), must-see destination (+23%-pts.), new unexpected experiences (+22%-pts.), wildlife viewing (+21%-pts.) and culture/history (+20%-pts.)
- » The groups are closer to each other regarding aspects such as wellness opportunities in Greenland or it only being suitable for travel during summer.
- » Persons WITH knowledge name on average 6.1 of the 21 characteristics in the question. Persons with a vague idea 5.3 and those with NO knowledge only name 2.6 characteristics.



Please tell me which of these characteristics do you think particularly apply to Greenland?
 Basis: All respondents in Scandinavia with knowledge (n=1,061), a vague idea (n=3,340) and with no idea and never heard (n=1,176) of Greenland
 Source: Visit Greenland market study Scandinavia 2023 by NIT

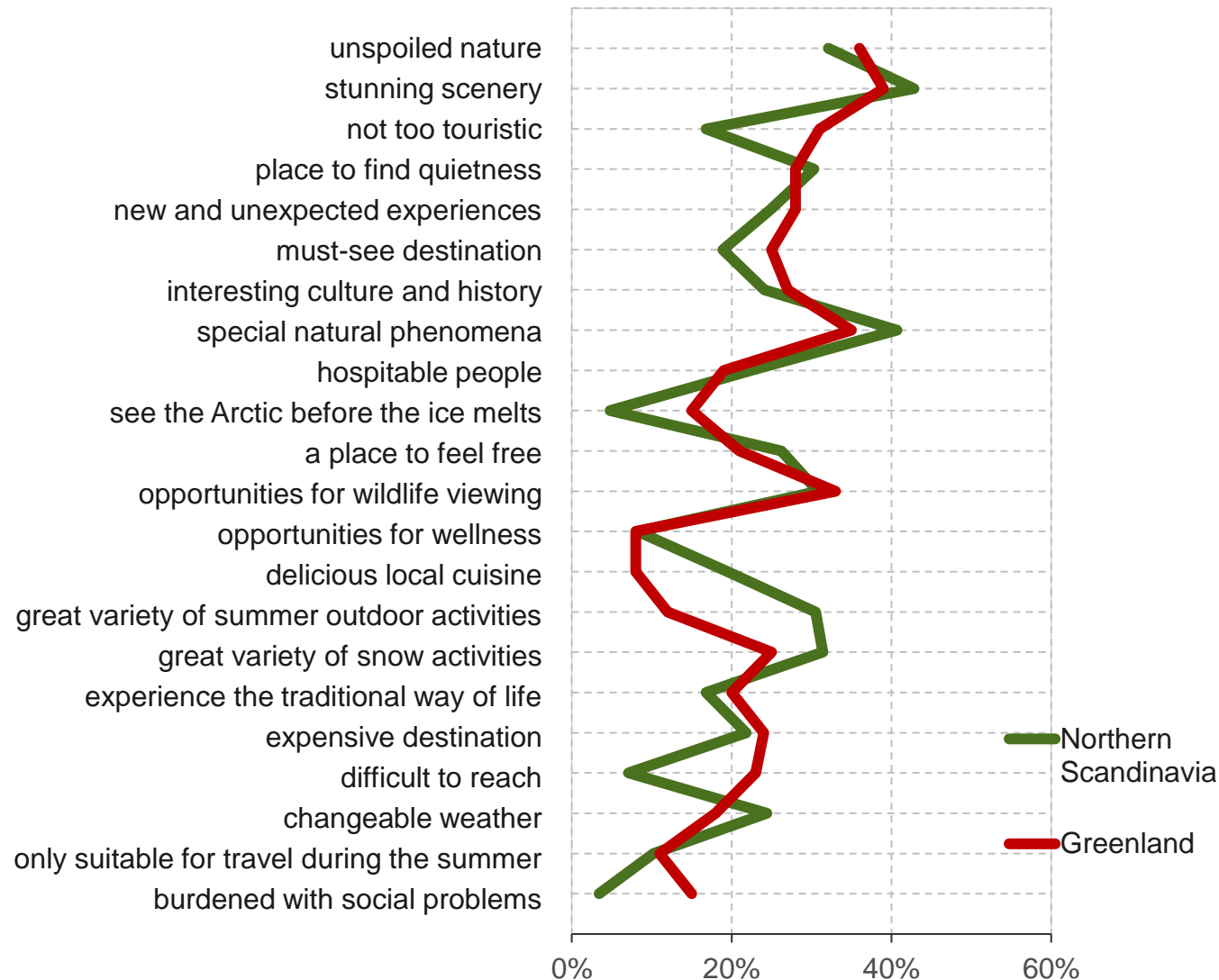
Image of Greenland and Iceland on the Scandinavian market



- » 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: "stunning scenery", "unspoiled nature", "natural phenomena" and "wildlife viewing".
- » More characteristic for Greenland than for Iceland:
 - » Not too touristic (+17%-pts.)
 - » Difficult to reach (+15%-pts.)
 - » Social problems (+12%-pts.)
 - » See the Arctic now (+10%-pts.)
- » More characteristic for Iceland than for Greenland:
 - » Wellness (+38%-pts.)
 - » Summer activities (+14%-pts.)
 - » Hospitable people (+10%-pts.)
 - » Must-see destination (+10%-pts.)

Please tell me which of these characteristics do you think particularly apply to Greenland?
 Basis: All respondents in Scandinavia (n=6,000)
 Source: Visit Greenland market study Scandinavia 2023 by NIT

Image of Greenland and Northern Scandinavia on the Scandinavian 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, the top characteristics are the same: “Stunning scenery”, “unspoiled nature”, “natural phenomena” and “wildlife viewing”.
- » More characteristic for Greenland than for Northern Scandinavia:
 - » Difficult to reach (+16%-pts.)
 - » Not too touristic (+14%-pts.)
 - » Social problems (+12%-pts.)
 - » See the Arctic now (+10%-pts.)
- » More characteristic for Northern Scandinavia than for Greenland:
 - » Summer activities (+19%-pts.)
 - » Delicious local cuisine (+12%-pts.)
 - » Snow activities (+6%-pts.)
 - » Changeable weather (+6%-pts.)

Please tell me which of these characteristics do you think particularly apply to Greenland?
 Basis: All respondents in Scandinavia (n=6,000)
 Source: Visit Greenland market study Scandinavia 2023 by NIT

To learn 2: Image of Greenland on the Scandinavian market



Knowledge of Greenland in Scandinavia

- » 19% of the population with no previous Greenland experience heard or read a lot about Greenland, 60% have only a vague idea and 20% know the country only by name. A very small minority of 1% has never heard of Greenland. For the potential travellers to Greenland, the share of those knowing a lot about Greenland is much higher than in the general population.

Image Greenland in Scandinavia:

- » The key image factors of Greenland in the Scandinavian population are: Stunning scenery, unspoiled nature, natural phenomena, opportunities for wildlife viewing and not too touristic.
- » Greenland is not famous for its delicious local cuisine, opportunities for wellness and being only suitable for travelling in the summer.
- » Persons in Scandinavia name on average 5.0 of the 21 characteristics in the question.
- » Persons WITH interest to travel to Greenland consider it much more to be a must-see destination, having a stunning scenery, natural phenomena, and a place to feel free. Persons with interest to travel to Greenland name on average 6.7 of the 21 characteristics while Persons with NO interest name 4.5 characteristics.

- » Comparing the image depending on the knowledge of Greenland, higher knowledge leads to higher image figures of most topics. Persons WITH knowledge name on average 6.1 of the 21 characteristics while those with NO knowledge only name 2.6 characteristics.
- » When comparing the three Scandinavian markets you see that the ranking is similar in all three markets, with the Denmark figures being mostly high above those of Sweden and Norway.

Image benchmarking in Scandinavia: Greenland and competitors

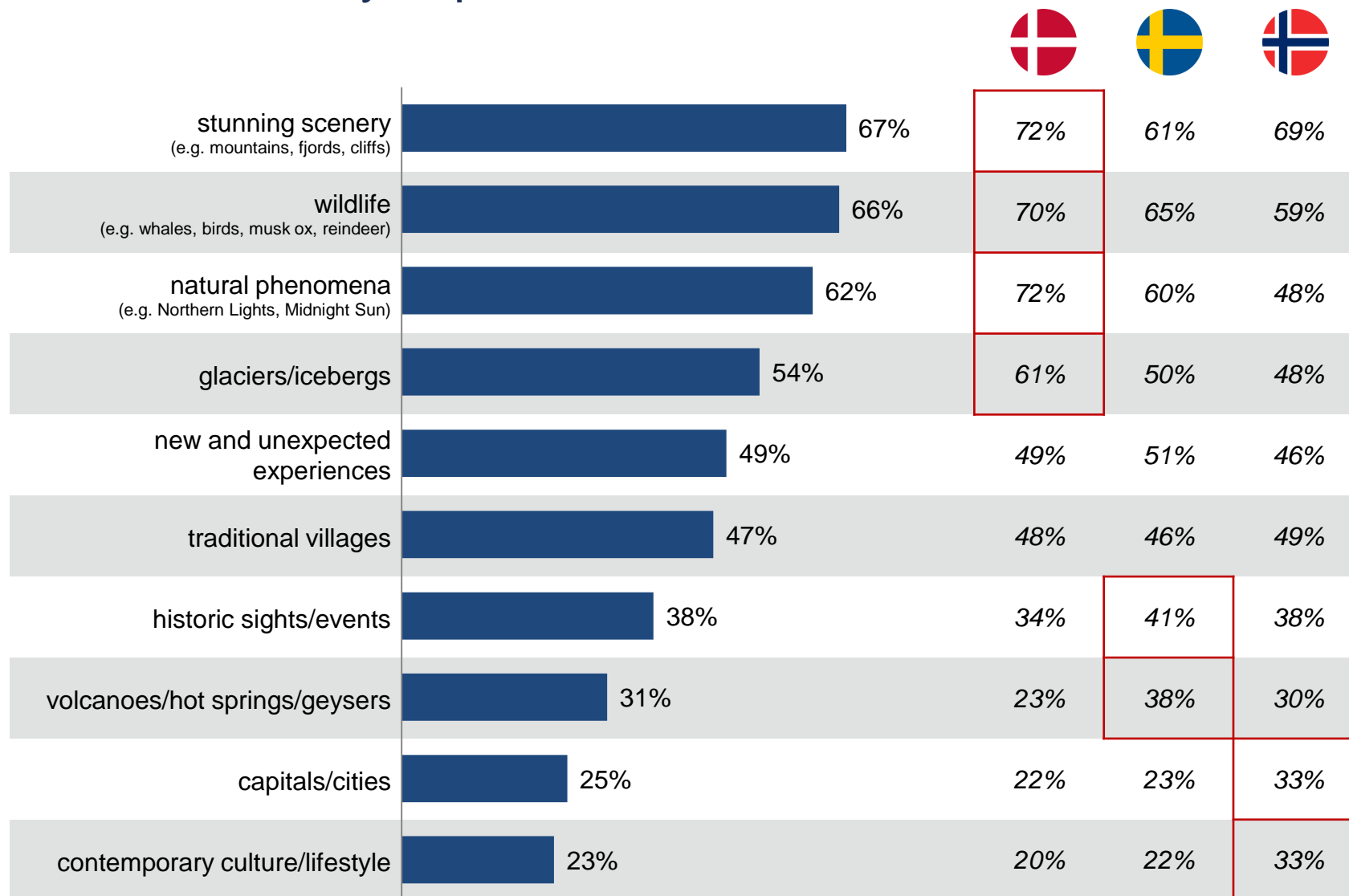
- » When benchmarking the images of Greenland and its main competitors Iceland and Northern Scandinavia, we find that stunning scenery, unspoiled nature, natural phenomena and wildlife viewing are important image factors in all those destinations.
- » Greenland is sticking out over its two competitors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

- » The results about the image of Greenland in Scandinavia give you a clear picture of how Greenland is perceived as a holiday destination in this market. They also clearly show what potential travellers expect and what not.
- » 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 2023

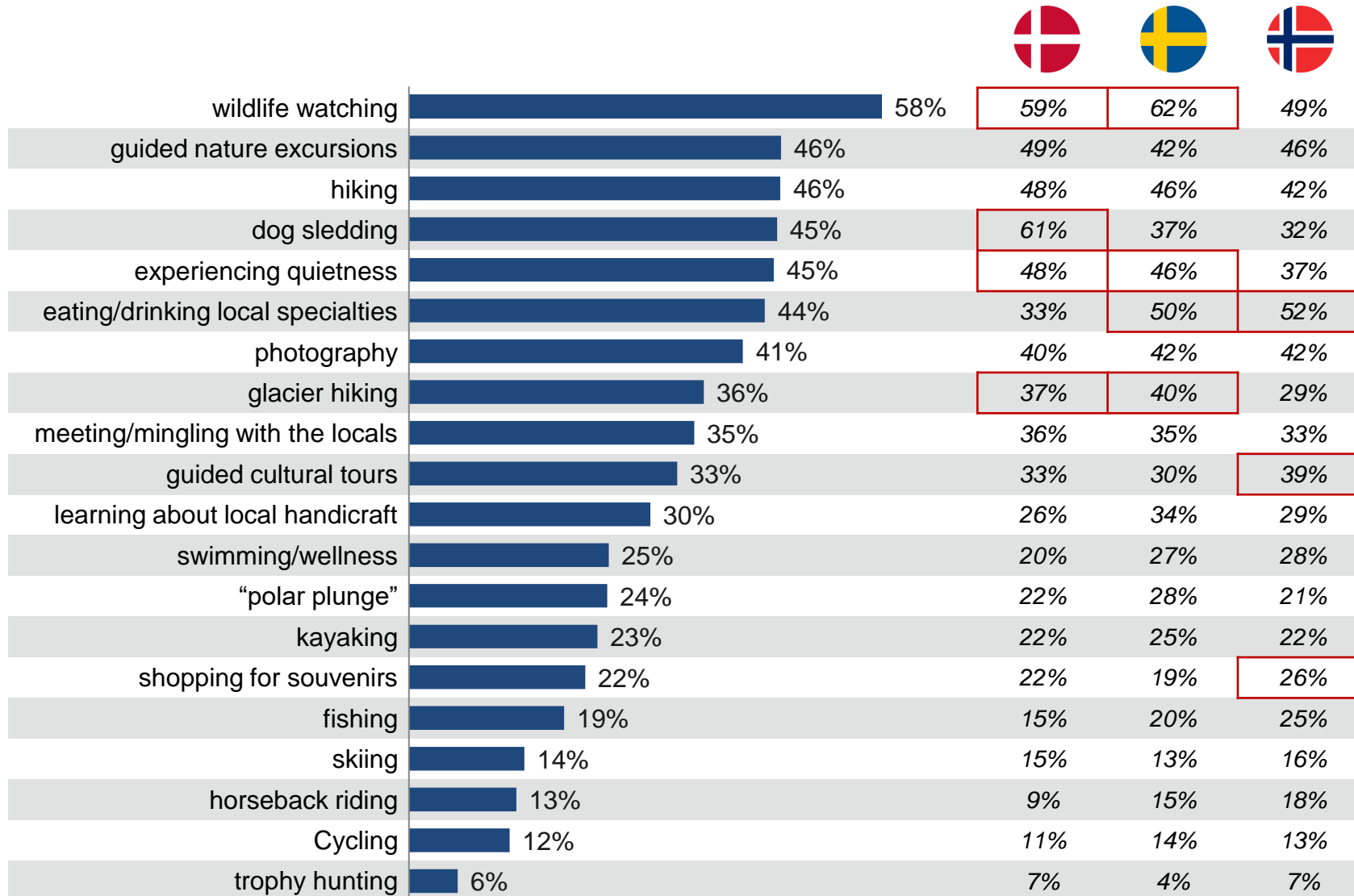
Potential travellers to Greenland: Preferred holiday experiences in Greenland



- » For potential Greenland travellers in Scandinavia it is most important to experience the stunning scenery, the wildlife, natural phenomena and glaciers/icebergs.
- » Cities and contemporary lifestyle are at the bottom of the ranking – but with figures of still around 25%.
- » This ranking of the Top 3 experiences is the same in the three markets, with Denmark scoring the highest.
- » The second half of the ranking is also very interesting when comparing the countries: We see that the Norwegians are slightly more into experiencing villages/cities and culture/lifestyle than the other markets.
- » On average 4.6 of the 10 aspects are of interest for potential Greenland travellers in Scandinavia. The average is very similar in the three markets.

When thinking about travelling to Greenland what would you like to see/experience?
 Basis: Potential travellers to Greenland from Scandinavia (DK, SE, NO; n=1,305); Denmark (n=619), Sweden (n=367) and Norway (n=364);
 Source: Visit Greenland market study Scandinavia 2023 by NIT

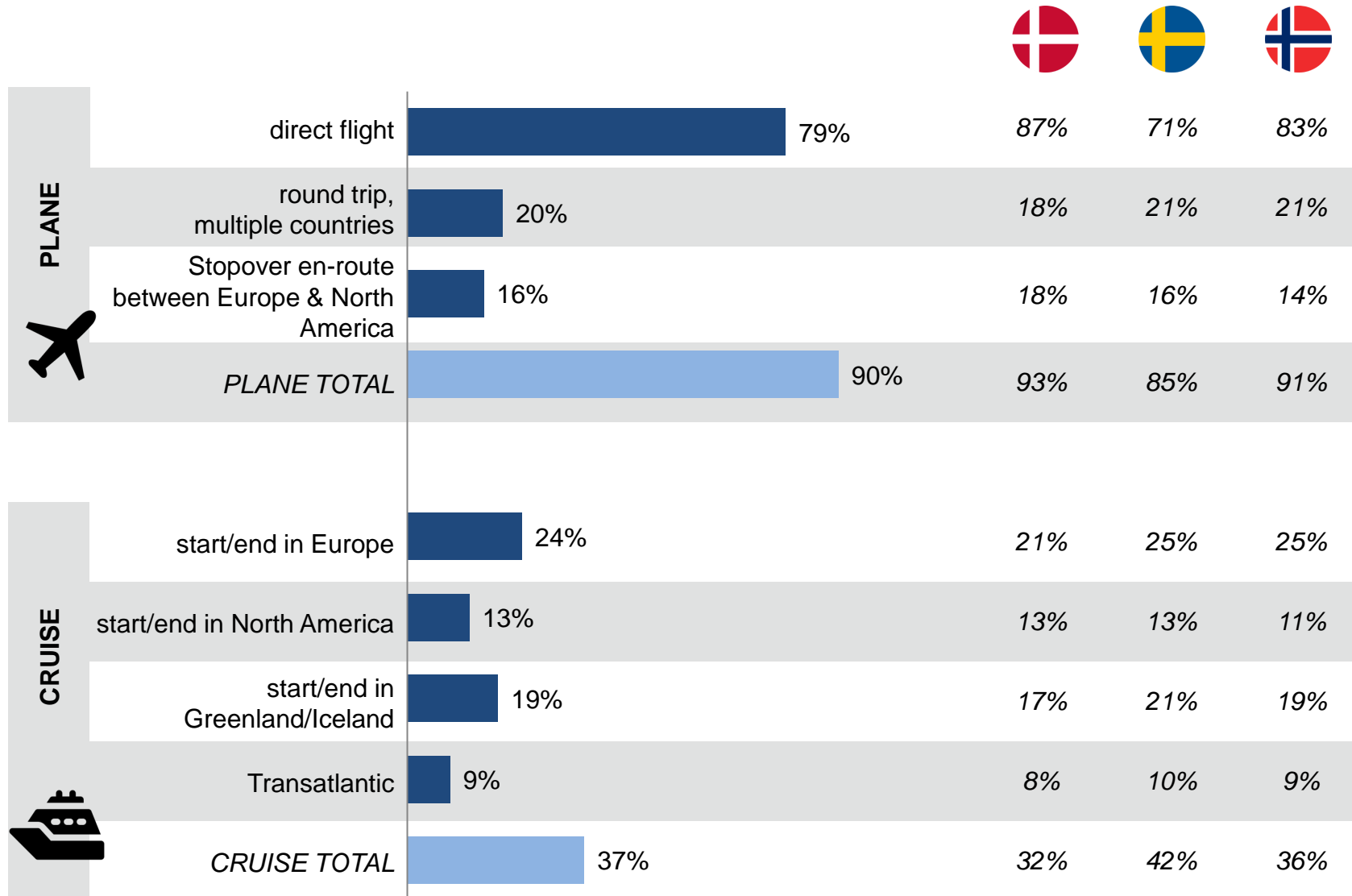
Potential travellers to Greenland: Preferred holiday activities in Greenland



- » The most sought-after activity in Greenland by potential travellers from Scandinavia is wildlife-watching.
- » Potential travellers from Scandinavia named on average 6.2 activities as interesting to them.
- » Overall, the rankings are quite characteristic per country.
- » The top activities already show some differences for the three markets. Swedish travellers clearly prefer wildlife-watching, while Danish are in between dog-sledding (the ratings are outstandingly high!) and wildlife-watching, and Norwegian travellers prefer the consumption of specialties slightly over wildlife watching.
- » Generally, the Danish and Swedish seem to be mostly nature-minded, while the Norwegians have a comparatively strong preference for cultural and culinary experiences.

Which of the following activities would you like to do when travelling to Greenland?
 Basis: Potential travellers to Greenland from Scandinavia (DK, SE, NO; n=1,305); Denmark (n=619), Sweden (n=367) and Norway (n=364);
 Source: Visit Greenland market study Scandinavia 2023 by NIT

Potential travellers to Greenland: Preferences about getting to Greenland

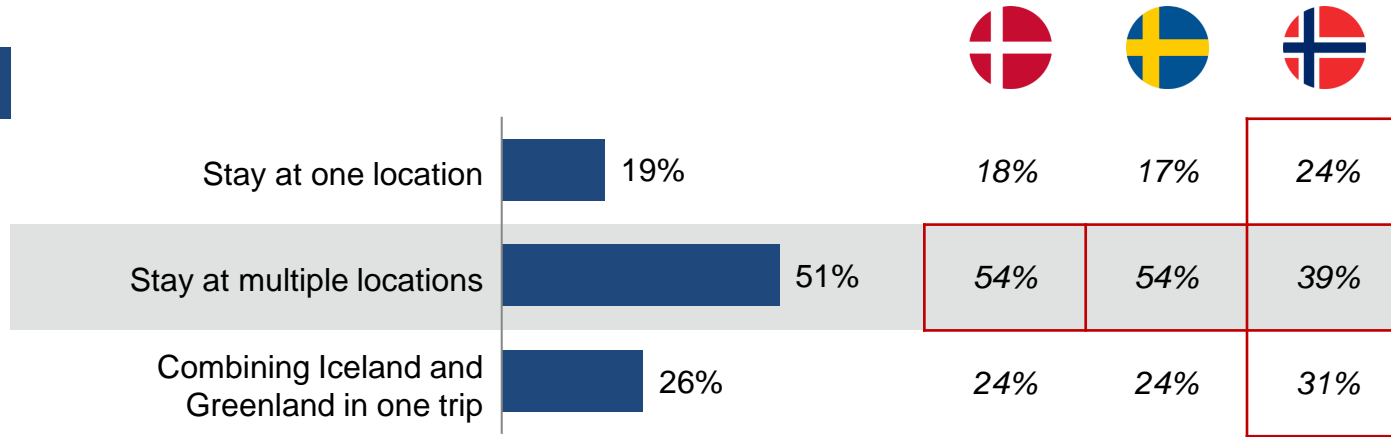


- » In total, 90% of the potential guests in Scandinavia would prefer the **plane** to travel to Greenland
- » In detail, 79% prefer direct flights to Greenland; 20% want to visit Greenland during a multi country air trip and 16% as a stop between Europe and North America.
- » 37% of the potential guests in Scandinavia would like to visit Greenland on a **cruise**.
- » In detail, 24% prefer the start/end to be in Europe, 19% would like it to start/end in Greenland/Iceland.
- » Overall, the Swedish have slightly lower preferences for plane and slightly higher preferences for cruises compared to the other two markets.

How would you like to travel to Greenland?
 Basis: Potential travellers to Greenland from Scandinavia (DK, SE, NO; n=1,305); Denmark (n=619), Sweden (n=367) and Norway (n=364);
 Source: Visit Greenland market study Scandinavia 2023 by NIT

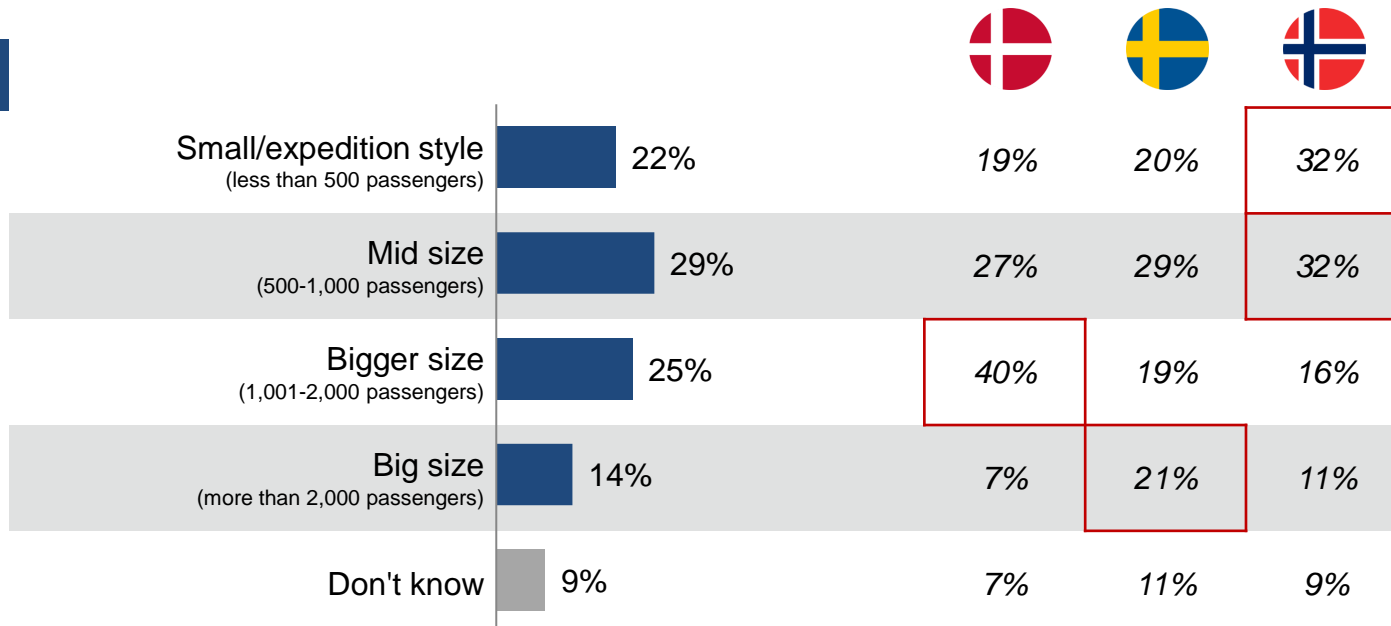
Potential travellers to Greenland: How to travel by plane/cruise ship to Greenland

Travel by plane



» Among the potential **plane** travellers (direct or with stop over), 51% prefer visiting multiple locations while 19% would like to stay at one location in Greenland and 26% can imagine combining Iceland and Greenland in one trip. Norwegians are less likely to stay at multiple locations and more likely to combine a trip or stay at one location than the other markets.

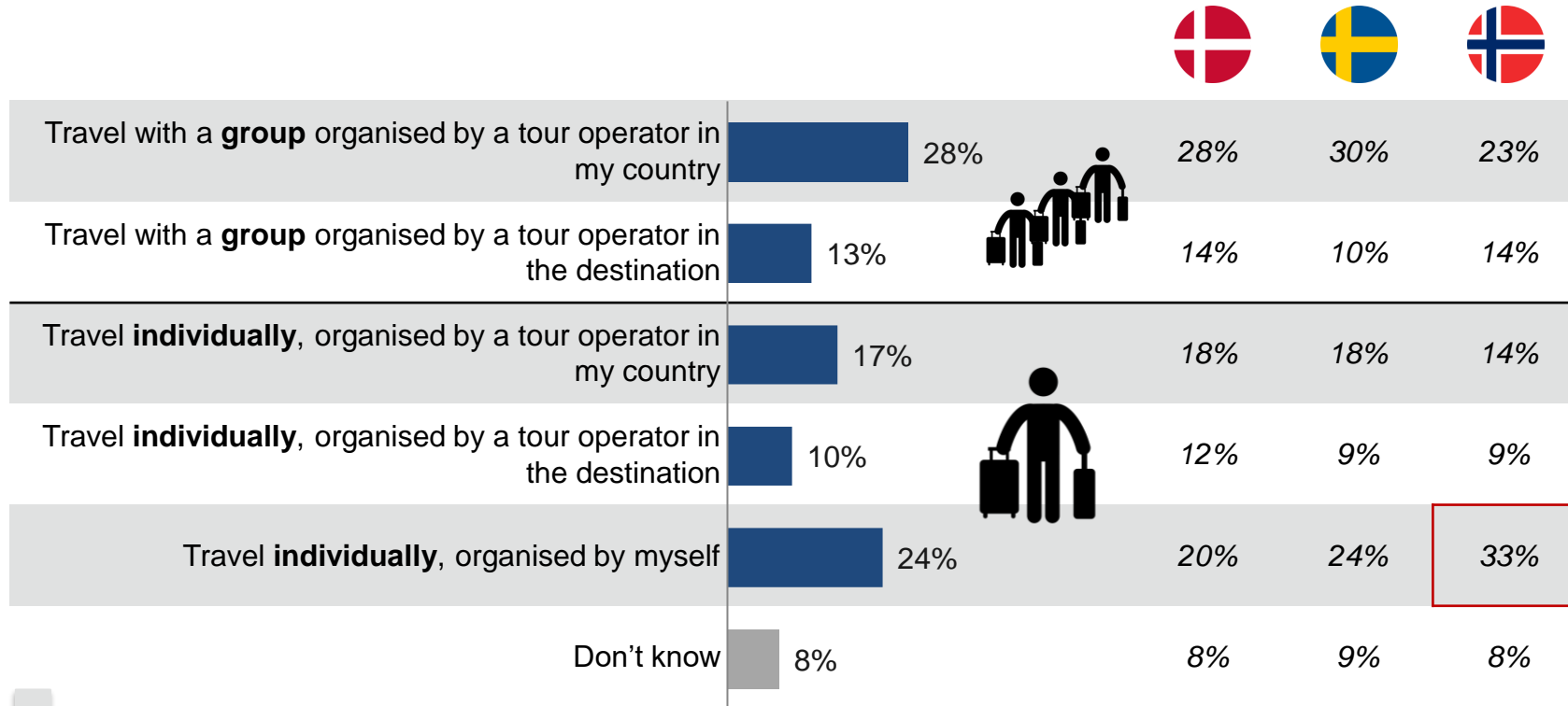
Travel by cruise



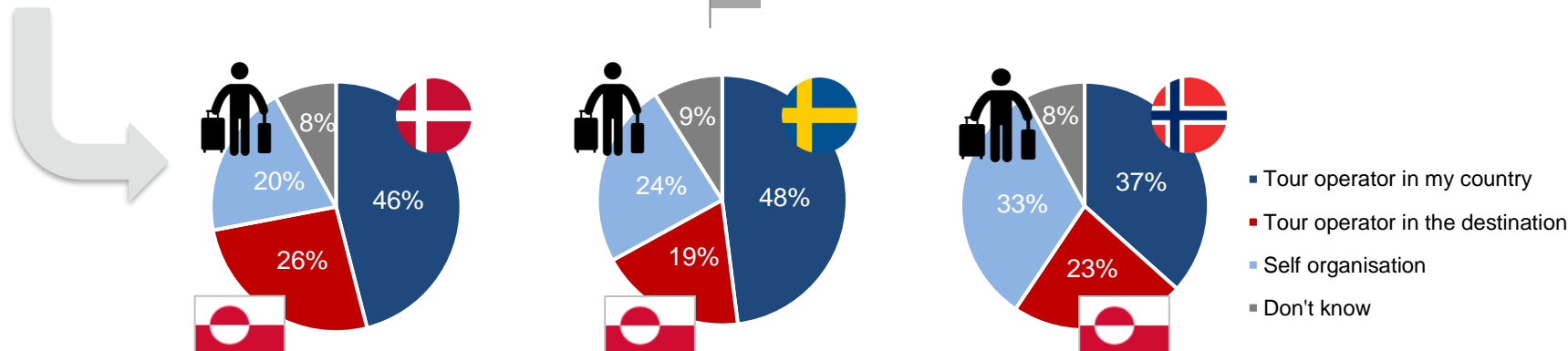
» Among the potential **cruise** travellers, the majority (54%) prefers a mid or bigger sized ship with 500 to 2,000 passengers and 22% prefer smaller or expedition style ship with less than 500 passengers. Only 14% are interested in a bigger sized ship with more than 2,000 passengers.

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 Scandinavia that prefer going to Greenland by **plane** with direct flight or stopover (total n=1,107); Denmark (n=561), Sweden (n=288) and Norway (n=314); and by **cruise** (total; n=481); Denmark (n=196), Sweden (n=155) and Norway (n=132); Source: Visit Greenland market study Scandinavia 2023 by NIT

Potential travellers to Greenland: Preferences about travel organisation to Greenland

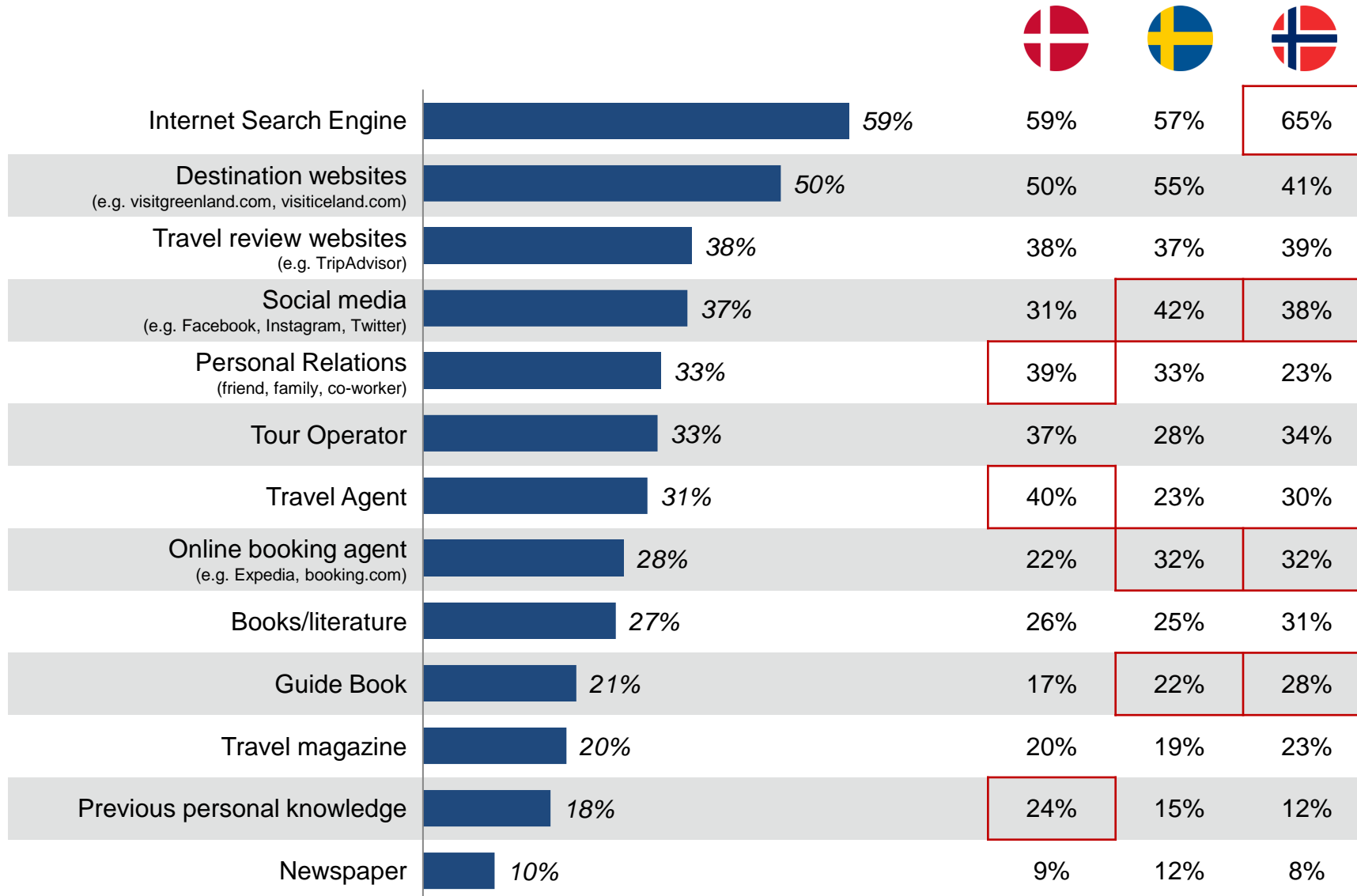


- » Among the potential **plane** travellers, the majority prefers to travel individually (51%), 41% prefer travelling with a group.
- » Overall, most Scandinavian plane travellers prefer the organisation of their Greenland trip by an operator in their country. However, these shares differ for the three markets. Swedish and Danish traveller mainly prefer an operator in their country to organise the trip, the Norwegians almost equally prefer the self organisation of the trip. The organisation by a tour operator from Greenland is interesting for a fifth (Sweden) up to a quarter (Denmark) of the potential travellers.



How would you like to organize your trip to Greenland?
 Basis: Potential travellers to Greenland from Scandinavia that prefer going by plane (total n=1,167); Denmark (n=577), Sweden (n=312) and Norway (n=331);
 Source: Visit Greenland market study Scandinavia 2023 by NIT

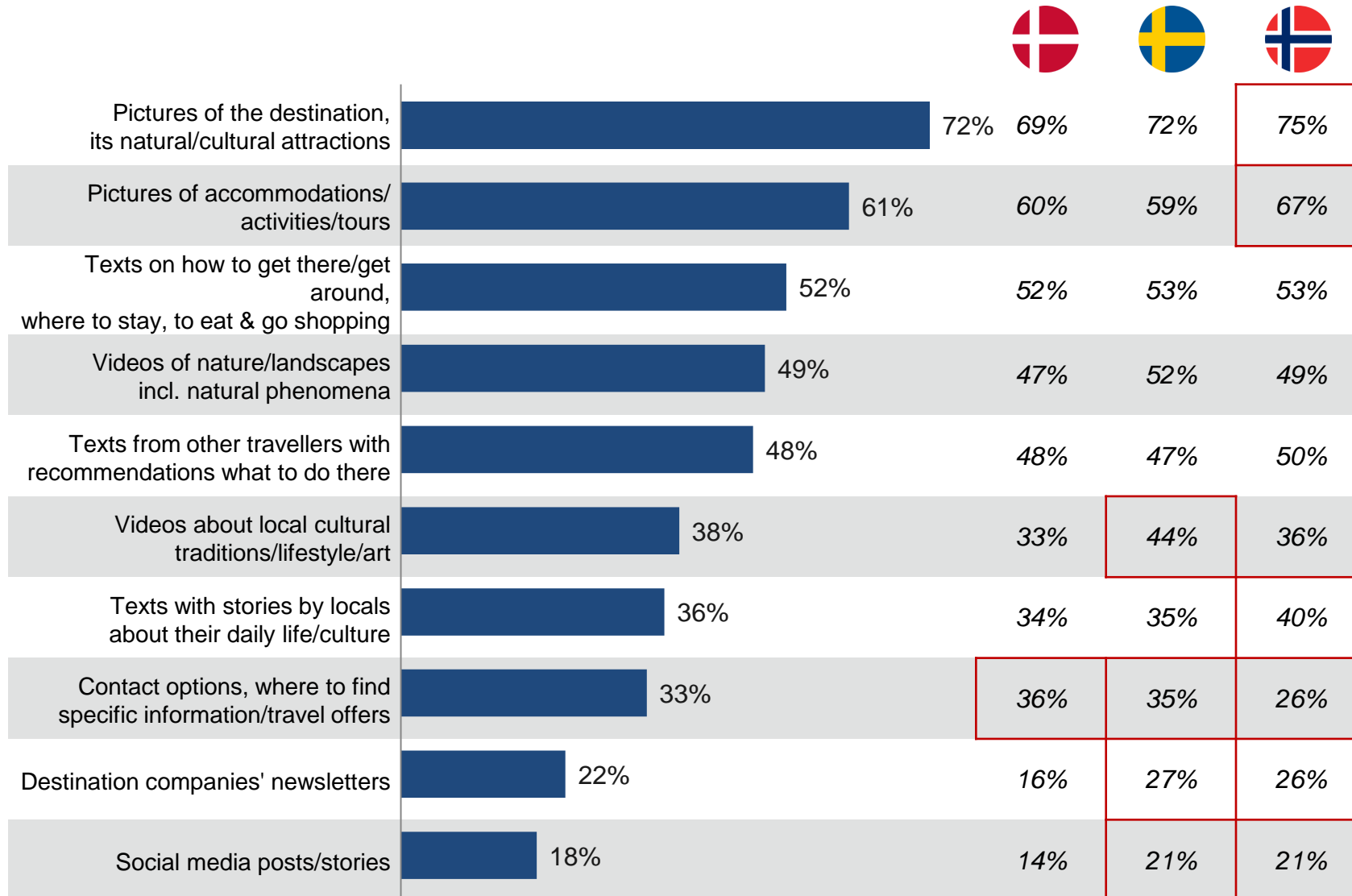
Potential travellers to Greenland: Preferred sources for inspiration & information



- » The most popular source for information and inspiration of potential travellers in Scandinavia when planning a trip to Greenland are internet search engines (59%) and destination websites (50%), with some distance follow travel review websites (38%), social media (37%), personal relations (33%), tour operator (33%) and travel agents (31%), all on a similar level.
- » At country level, internet search engines are the main source for Norwegians (65%) and most other sources are less relevant.
- » In Denmark personal relations, travel agents and previous knowledge are more important, while in Sweden and Norway social media, online booking agents and guide books are more relevant.

When thinking about travelling to Greenland how would you like to look for inspiration/information for this trip?
Basis: Potential travellers to Greenland from Scandinavia (n=1,305), Denmark (n=619), Sweden (n=367), Norway (n=364); Source: Visit Greenland market study Scandinavia 2023 by NIT

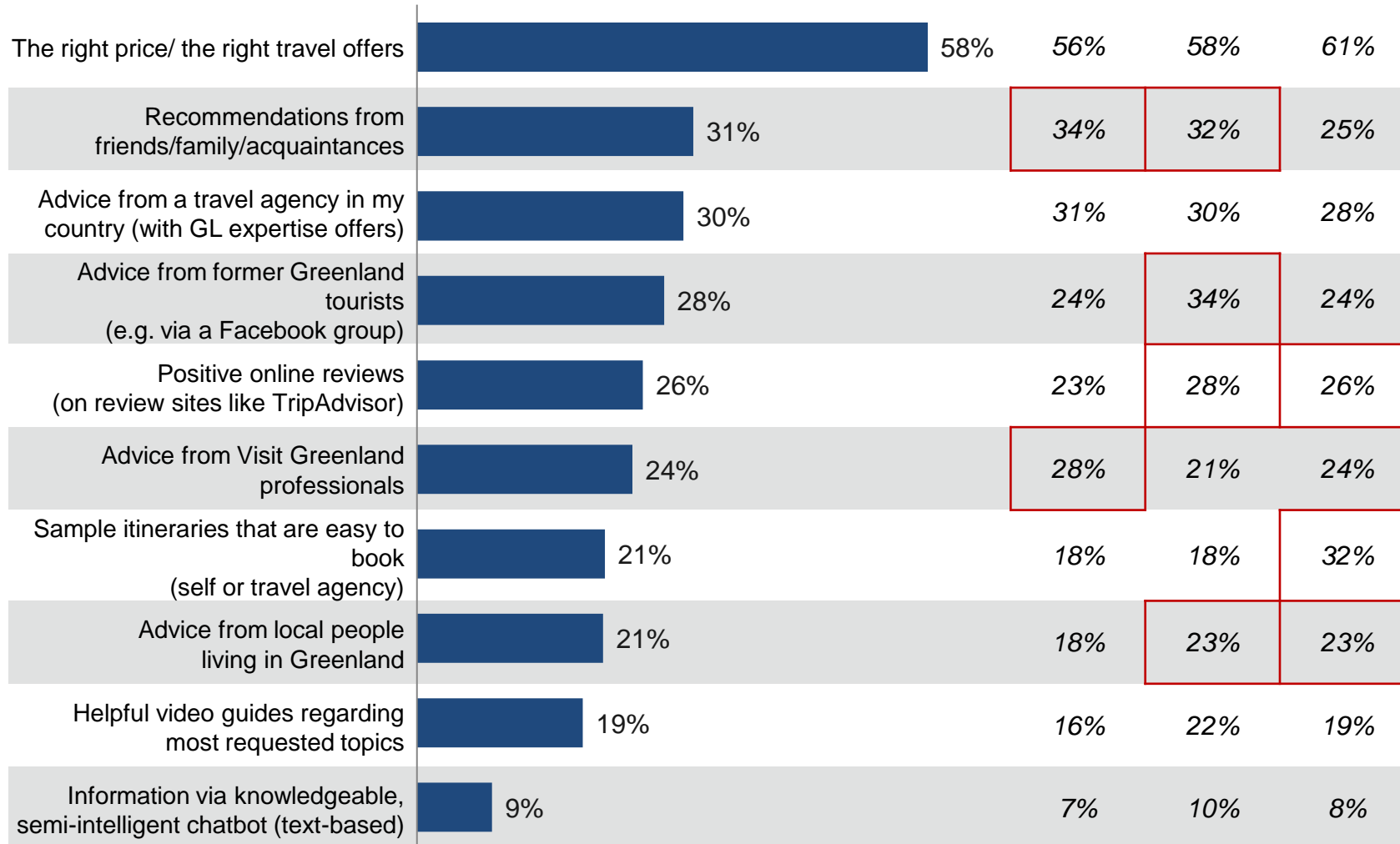
Potential travellers to Greenland: Preferred kind of online content



- » When asked for their preferred kind of online content, most potential Greenland guests in Scandinavia favour destination images ahead of factual texts on the travel product.
- » These seem to be basic prerequisites that every travel website should offer.
- » When looking at the differences and similarities between the markets, we see that here the similarities dominate. There are only slight differences:
- » The Danish are less interested in destination newsletters and social media posts.
- » The Danish and Swedish are looking slightly more for contact options
- » In Sweden slightly more cultural videos
- » In Norway pictures are even more important than in the other two countries.

Which kind of content do you like to find when looking for online information about Greenland?
Basis: Potential travellers to Greenland from Scandinavia (n=1,305); Denmark (n=619), Sweden (n=367), Norway (n=364); Source: Visit Greenland market study Scandinavia 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.
- » Following, but on a lower level of approval, are recommendations from friends, advice from travel agency in their own country, from former Greenland tourists or positive online reviews.
- » In Denmark and Sweden personal recommendations are more important and while the Danish favor advice from Greenland professionals, the Swedish and Norwegian favor online reviews and advice from locals. Sample itineraries are most important for the Norwegian potential travellers.




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

Basis: Potential travellers to Greenland from Scandinavia (n=1,305); Denmark (n=619), Sweden (n=367), Norway (n=364); Source: Visit Greenland market study Scandinavia 2023 by NIT

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

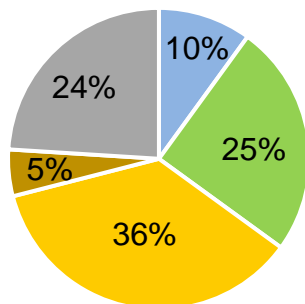


Visit (next time)

				
2023	9%	15%	4%	8%
2024	17%	13%	20%	17%
2025	18%	18%	19%	19%
2026-2030	29%	28%	29%	32%
Later than 2030	4%	4%	4%	4%
Never	4%	3%	4%	3%
Don't know	19%	19%	20%	17%

- » The survey also asked details about the **year** when the trip to Greenland is likely to come true: 9% of the potential travellers in Scandinavia plan on visiting Greenland this year (2023), 17% in 2024, 18% in 2025 and 33% in 2026 or later.
- » For the Danish the share of those planning to still visit this year is much higher than for the other two countries.
- » When asked about the preferred **months** to travel to Greenland, most potential travellers prefer going to Greenland in July/August/September (36%), followed by April/May/June (25%). Norwegians prefer the summer even more than the other two countries.

Preferred months



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

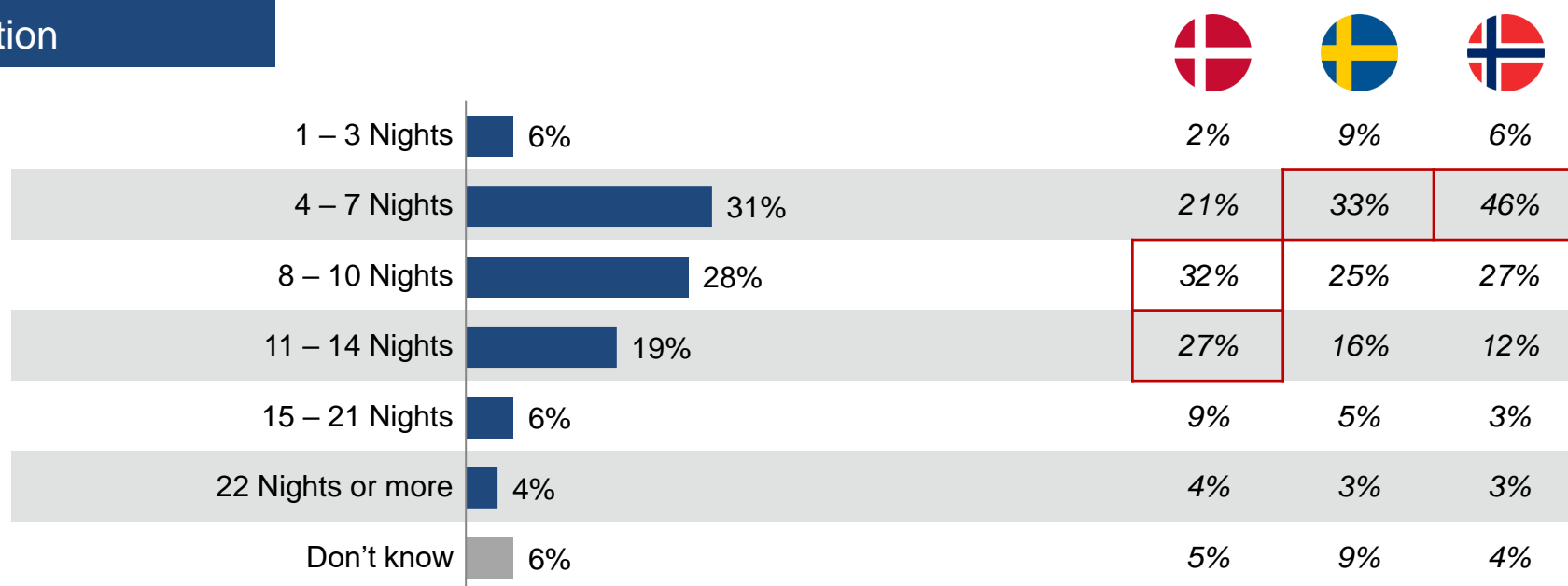
*When, realistically, do you think you will visit Greenland?
What would be your preferred months for a visit to Greenland?
How much time would you like to spend during your next trip to Greenland?*

Basis: Potential travellers to Greenland from Scandinavia (n=1,305); Denmark (n=619), Sweden (n=367), Norway (n=364);
Source: Visit Greenland market study Scandinavia 2023 by NIT

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



Duration

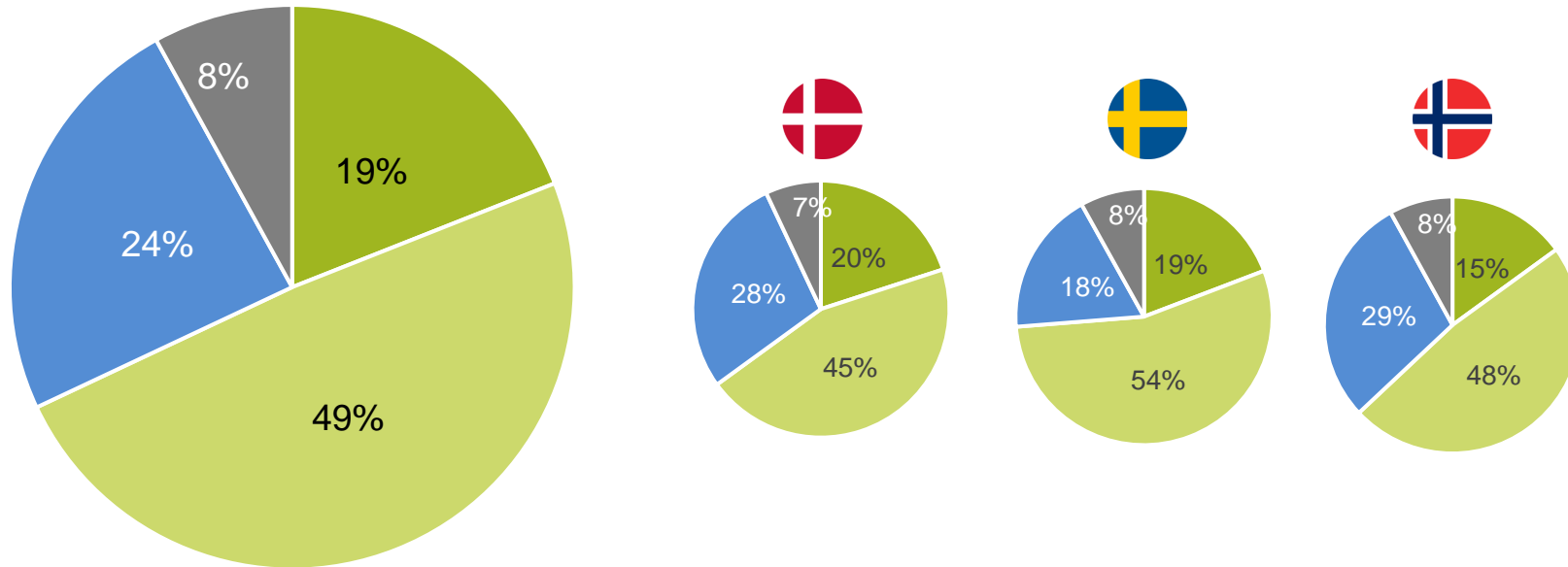


- » When asked about **how much time** they would like to spend in Greenland more than half of the potential travellers in Scandinavia (59%) want to spend between 4-10 nights, and 19% 11-14 nights. Only 6% want to stay 3 nights and shorter and 10% longer than two weeks.
- » Comparison of the markets shows that Swedish and Norwegian potential travellers want to stay slightly shorter (mainly a week) than Danish potential travellers, who mainly would like to stay up to two weeks.

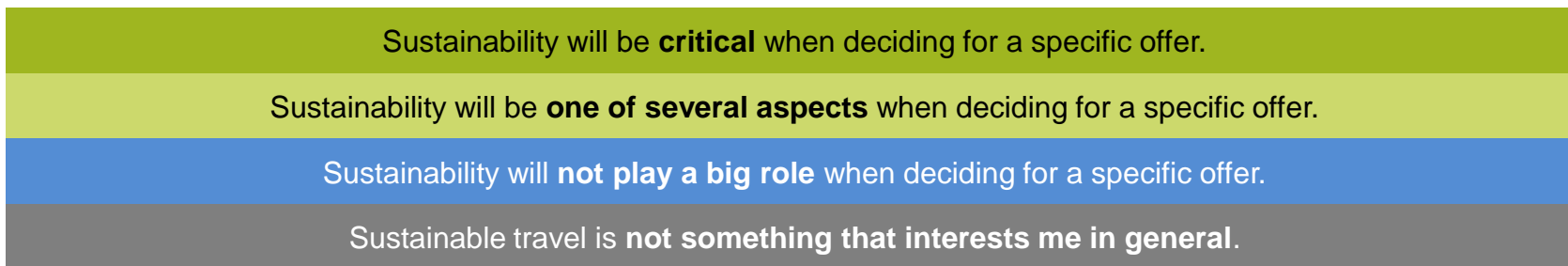
*When, realistically, do you think you will visit Greenland?
What would be your preferred months for a visit to Greenland?
How much time would you like to spend during your next trip to Greenland?*

Basis: Potential travellers to Greenland from Scandinavia (n=1,305); Denmark (n=619), Sweden (n=367), Norway (n=364);
Source: Visit Greenland market study Scandinavia 2023 by NIT

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



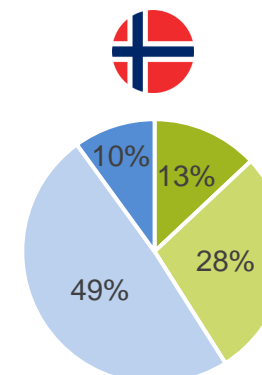
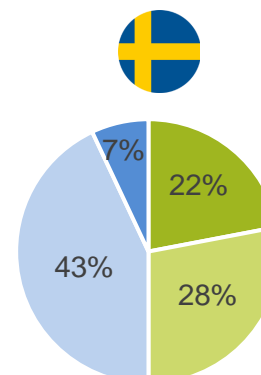
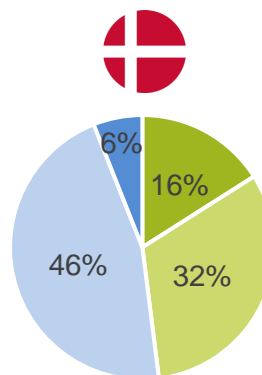
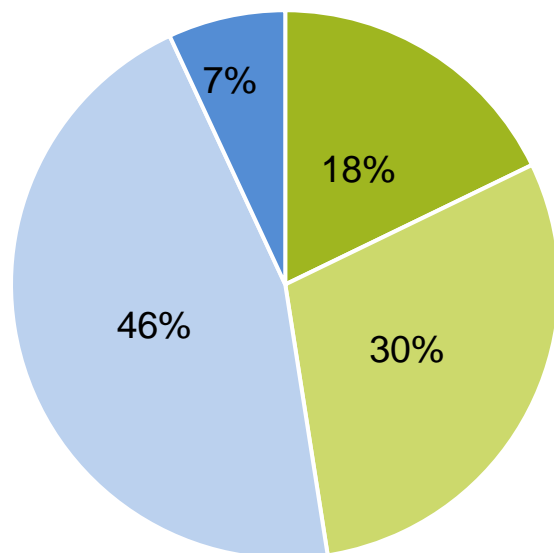
- » We asked the potential travellers how crucial sustainability is when planning a trip to Greenland.
- » 19% state that sustainability will be the critical deciding factor and 49% consider it one of several aspects influencing the decision for a specific offer. A quarter does not really consider sustainability and even less (8%) are not interested in this topic.
- » Comparing the three markets, Sweden stands out as it has the highest share of those considering sustainability as one of several aspects and the lowest share of those for whom sustainability doesn't play a big role.



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 Scandinavia (n=1,305); Denmark (n=619), Sweden (n=367), Norway (n=364); Source: Visit Greenland market study Scandinavia 2023 by NIT

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



- » Potential travellers were also asked about the relevance of price and quality for their decision-making when travelling to Greenland.
- » The majority (46%) consider themselves as price-oriented, with some distance followed by 30% that are more quality-oriented when travelling to Greenland.
- » 18% state that the price only plays a minor role during the decision-making process. This group can be considered as luxury tourists. Only a minority of 7% belongs to the so-called cheap-tourists that only pay attention to the price in the decision-making process.
- » Looking at the three markets, Sweden has the highest share of luxury tourists and Norway the most cheap-tourists. Overall tourists from Norway focus more on price than from the other two markets.

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 Scandinavia (n=1,305); Denmark (n=619), Sweden (n=367), Norway (n=364); Source: Visit Greenland market study Scandinavia 2023 by NIT

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.

To learn 3: Greenland product preferences 2023



Experiences:

- » For potential Greenland travellers in Scandinavia it is most important to experience the stunning scenery, wildlife, natural phenomena, and glaciers/icebergs. The ranking is the same for the three markets, with Denmark showing the highest scores, while Norwegians are slightly more interested into experiencing villages/cities and culture/lifestyle.

Activities:

- » The most sought-after activities in Greenland by potential travellers from Scandinavia is wildlife watching, which is then followed with some distance by guided nature excursions, hiking, dog sledding. Potential travellers from Scandinavia named on average 6.2 activities as interesting to them.
- » Regarding the top activities, the Swedish prefer wildlife-watching, the Danish as well but are also into dog sledding (with very high ratings), while Norwegians prefer local specialties. Generally, the Danish (and to a slightly lesser extend the Swedish as well) are mostly nature-minded, while the Norwegians have a comparatively strong preference for culinary and cultural experiences as well.

Getting there/around/organisation:

- » Most potential Greenland travellers in Scandinavia would prefer direct flights into Greenland and staying at multiple locations when being in Greenland. Among the plane travellers the majority prefers travelling individually and a tour operator in Scandinavia to organize the trip.

Information sources:

- » Internet search engines are the most popular source for information of potential travellers in Scandinavia when planning a trip to Greenland. They are closely followed by destination websites. While in Denmark personal relations, travel agents and previous knowledge are more important, in Sweden and Norway social media, online booking agents and guide books are more relevant.

Online content:

- » When asked for their preferred kind of online content, most potential Greenland guests in Scandinavia favor destination images ahead of factual texts.

Final decisive input:

- » In this phase it is crucial to find the “right” product with the “right” price. Following are recommendations from friends, advice from travel agency in their own country, from former Greenland tourists or positive online reviews.

Potential time of travel and duration

- » 9% of the potential travellers plan on visiting Greenland this year (2023), 17% in 2024, 18% in 2025 and 29% in 2026 or later. Half of the travellers would like to spend between 4-10 nights.

Importance of price and quality

- » 46% of the potential travellers are rather price-oriented, while 30% are rather quality-oriented when travelling to Greenland. A smaller share of 18% pays no attention to the price at all and 7% 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.

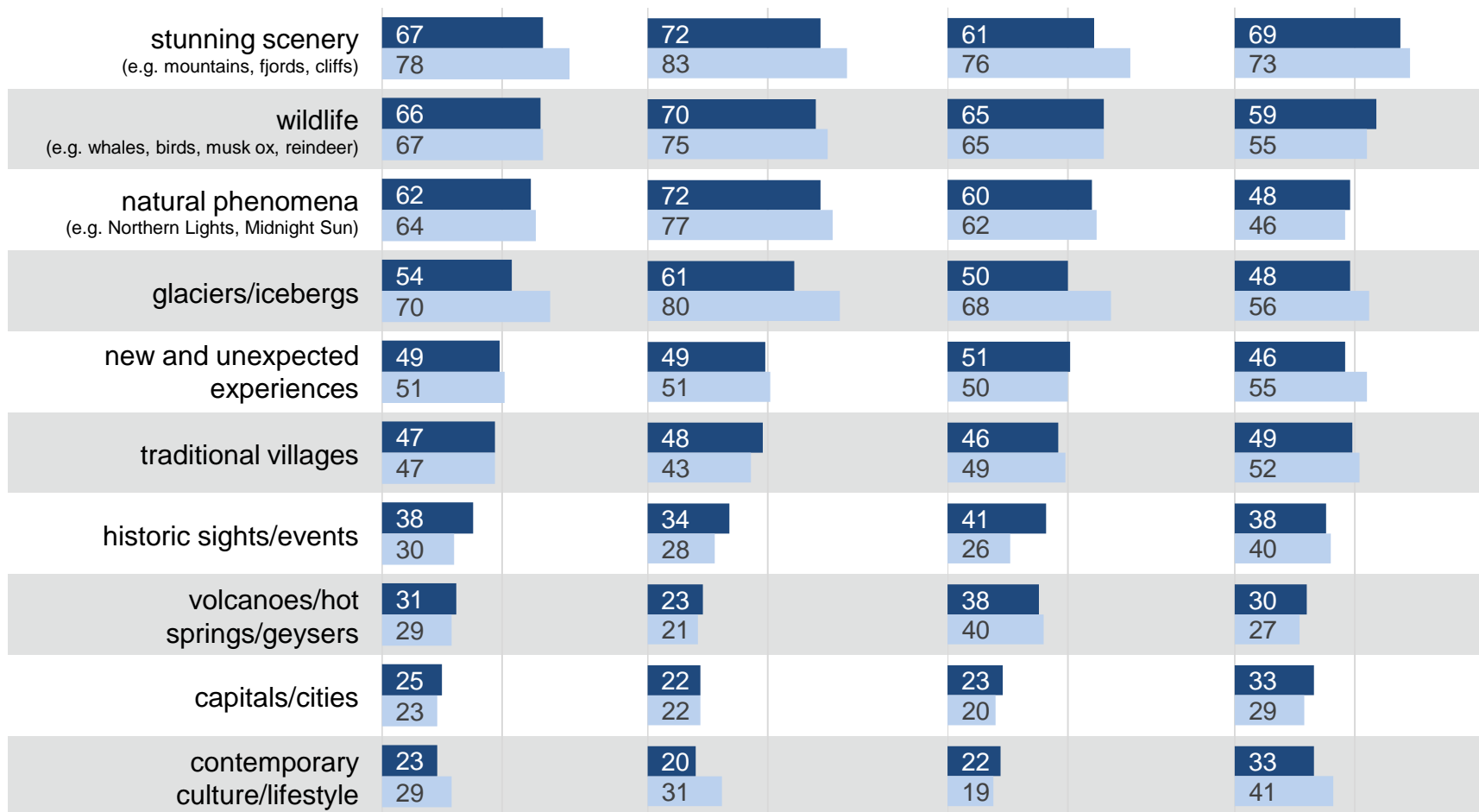


4. Greenland product preferences:
Timeline comparison

Potential travellers to Greenland, timeline comparison: Preferred holiday experiences in Greenland 2023 and 2018



all figures in %



- » For some questions about the desires of potential travellers, it is possible to compare the results of the 2023 study with the previous study in 2018.
- » In general, we can observe that the ranking of preferred experiences has remained relatively stable over time – at the same time we see some obvious decreases regarding some aspects.
- » In all markets glaciers/icebergs lost noticeably in relevance, as did – albeit with lesser extent – the stunning scenery. On the other hand, the interest in historic sights/events and capital/cities increased slightly over time.
- » Overall, 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.

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

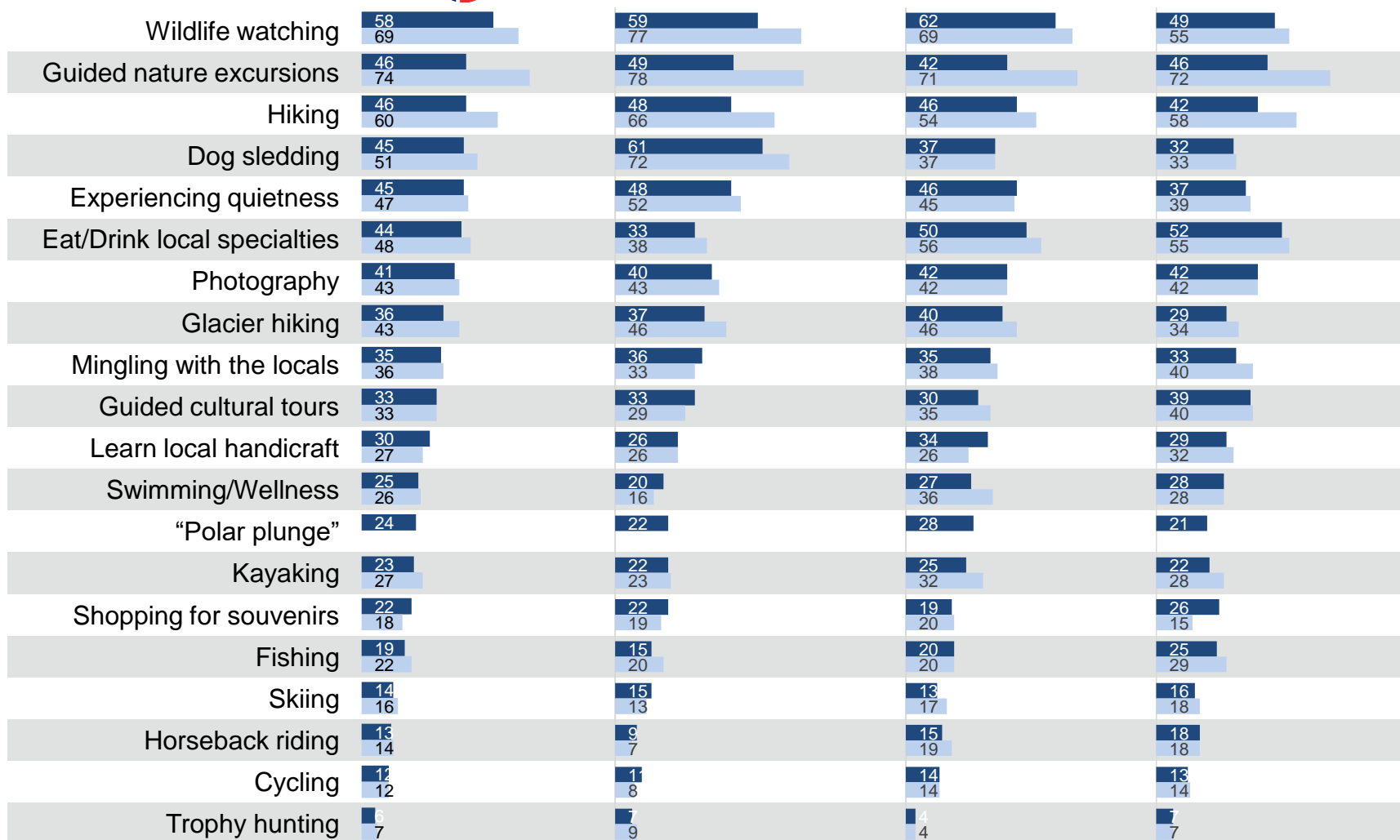
Basis: : Potential travellers to Greenland from Scandinavia (2023: n=1,305; 2018: n=1,147), Denmark (2023: n=619; 2018: n=576), Sweden (2023: n=367; 2018: n=282), Norway (2023: n=364; 2018: n=352);

Source: Visit Greenland market studies 2023 by NIT; Visit Greenland/Air Greenland market study Scandinavia 2018 by NIT

Potential travellers to Greenland, timeline comparison: Preferred holiday activities in Greenland



all figures in %



- » The timeline comparison of preferred activities in Greenland shows a similar picture as the timeline comparison of desired experiences.
- » The general ranking stays more or less the same, but significant drops regarding many activities in many markets can be observed.
- » 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.

Which of the following activities would you like to do when travelling to Greenland?

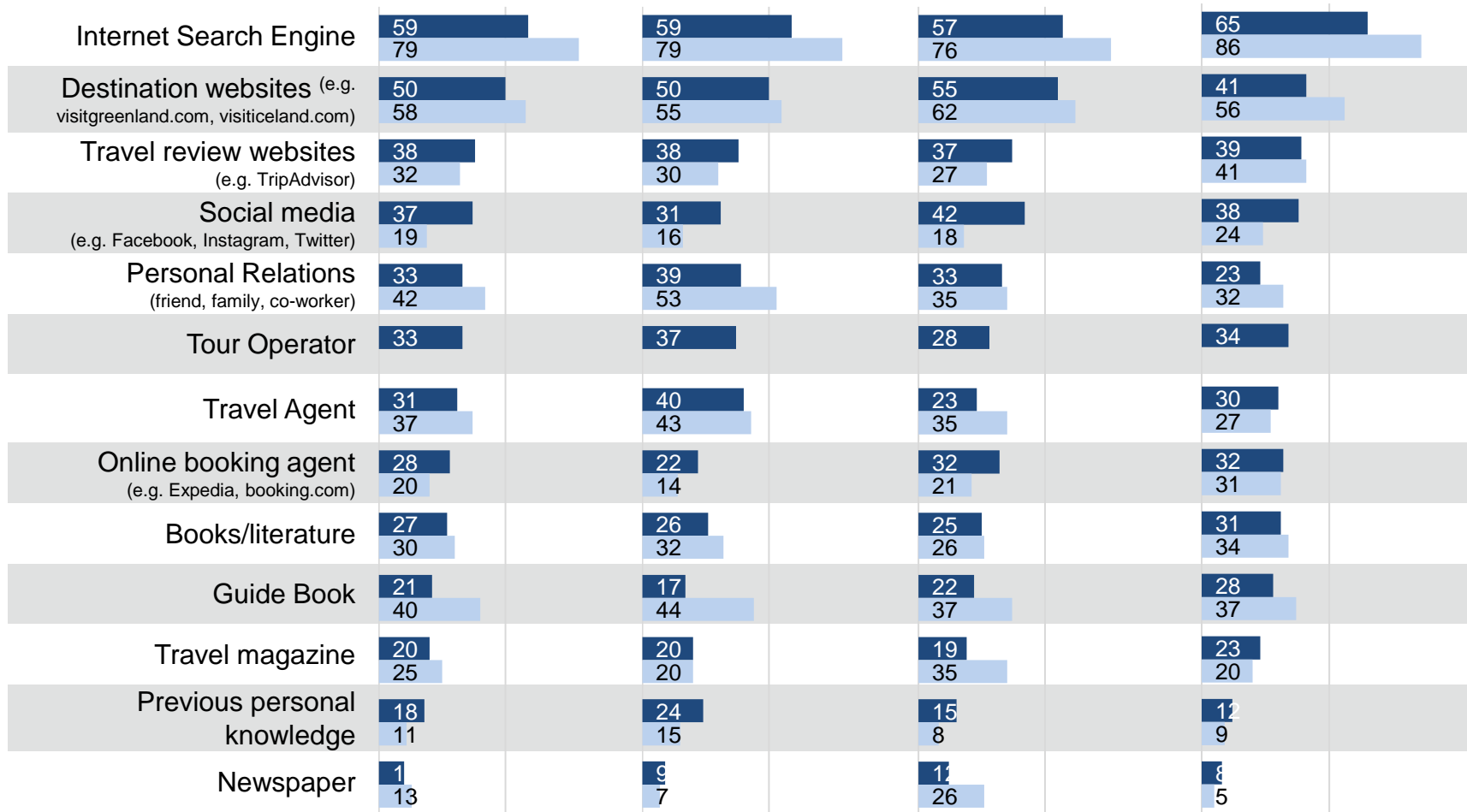
Basis: : Potential travellers to Greenland from Scandinavia (2023: n=1,305; 2018: n=1,147), Denmark (2023: n=619; 2018: n=576), Sweden (2023: n=367; 2018: n=282), Norway (2023: n=364; 2018: n=352);

Source: Visit Greenland market studies 2023 by NIT; Visit Greenland/Air Greenland market study Scandinavia 2018 by NIT

Potential travellers to Greenland, timeline comparison: Preferred sources for inspiration & information



all figures in %



- » The timeline comparison of preferred information sources that potential travellers would like to look at for planning their trip to Greenland shows a somewhat different dynamic than with the preferred experiences and activities.
- » In general, we can observe increases for the online sources and decreases for the offline sources.
- » It seems like there was a shift within the online sources – while internet search engines and destination websites became less relevant sources as compared to 2018, especially social media became more relevant. But also travel review websites and online booking agents increased their shares here.
- » Especially in Denmark, personal relations lost in relevance over time.

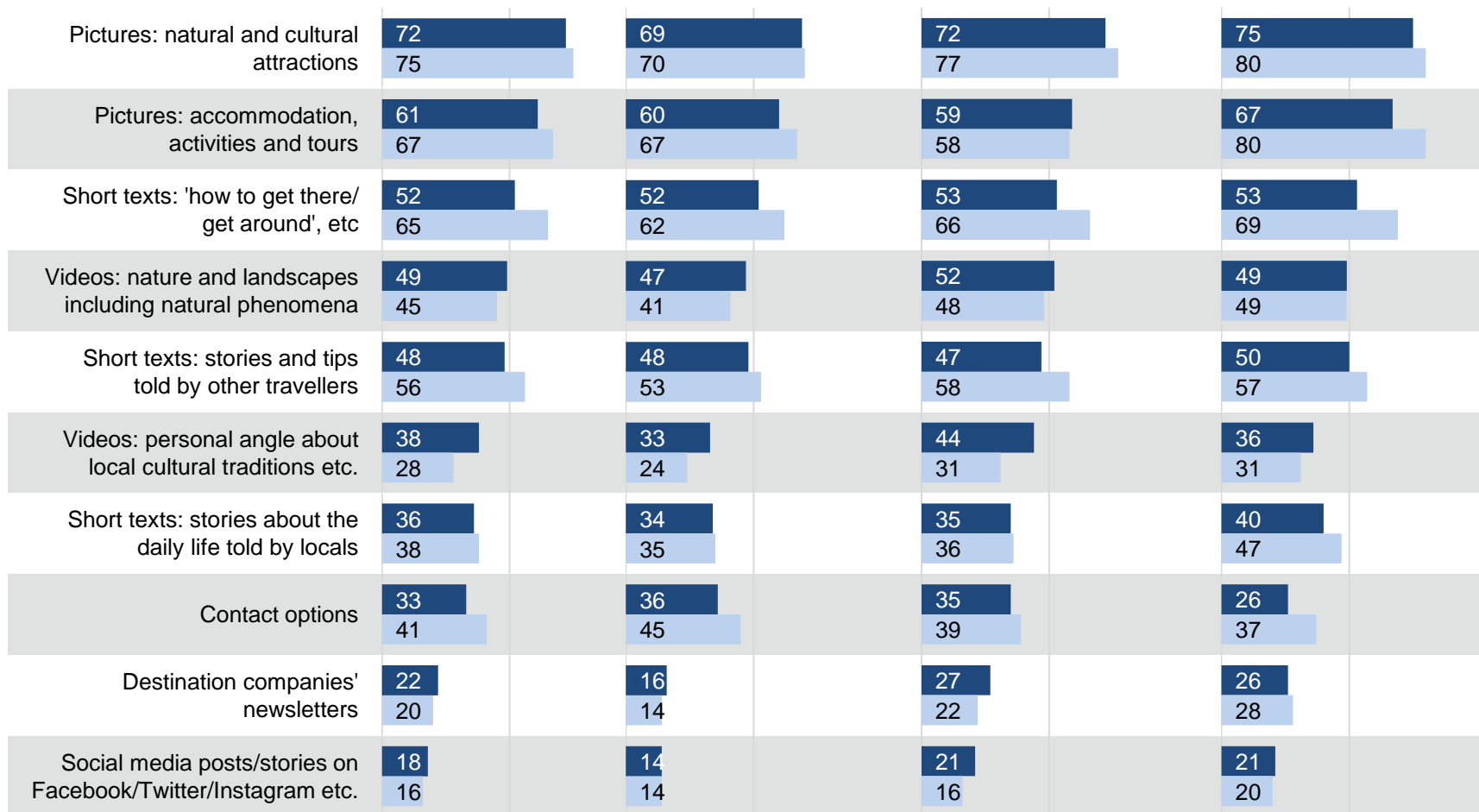
When thinking about travelling to Greenland, how would you like to look for inspiration/information for this trip?

Basis: : Potential travellers to Greenland from Scandinavia (2023: n=1,305; 2018: n=1,147), Denmark (2023: n=619; 2018: n=576), Sweden (2023: n=367; 2018: n=282), Norway (2023: n=364; 2018: n=352);
Source: Visit Greenland market studies 2023 by NIT; Visit Greenland/Air Greenland market study Scandinavia 2018 by NIT

Potential travellers to Greenland, timeline comparison: Preferred kind of online content



all figures in %



- » Also the question regarding the preferred online content when looking for online information about travelling to Greenland is showing some timeline dynamics.
- » The ranking of 2023 is quite similar with the previous studies, nevertheless there seem to be some dynamics which are similar in all the markets.
- » While pictures remain most popular, there is a slight decrease in the figures.
- » Different kinds of videos follow, in most markets with a slight upward trend.
- » Short texts are next in the ranking, all with showing significant decreases of their figures.
- » Social media was and stays last in line.

Which kind of content do you like to find when looking for online information about travelling to Greenland?
Basis: : Potential travellers to Greenland from Scandinavia (2023: n=1,305; 2018: n=1,147), Denmark (2023: n=619; 2018: n=576), Sweden (2023: n=367; 2018: n=282), Norway (2023: n=364; 2018: n=352);
Source: Visit Greenland market studies 2023 by NIT; Visit Greenland/Air Greenland market study Scandinavia 2018 by NIT

To learn 4: Greenland product preferences

Timeline comparison



Experiences:

- » In general, we can observe that the ranking of preferred experiences has remained relatively stable over time – at the same time we see some obvious decreases regarding some aspects.
- » In all markets glaciers/icebergs lost noticeably in relevance, as did – albeit with lesser extent – the stunning scenery. On the other hand, the interest in historic sights/events and capital/cities increased slightly over time.
- » Overall, there seem to be bigger drops in nature-focussed experiences than in culture-focussed experience – so nature is still dominating but to a lesser extent than before.

Activities:

- » The general ranking stays more or less the same, but significant drops regarding many activities in many markets can be observed.
- » 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:

- » In general, we can observe increases for the online sources and decreases for the offline sources.
- » It seems like there was a shift within the online sources – while internet search engines and destination websites became less relevant sources as compared to 2018, especially social media became more relevant. But also travel review websites and online booking agents increased their shares here.
- » Especially in Denmark, personal relations lost in relevance over time.

Online content:

- » The ranking of 2023 is quite similar with the previous studies, nevertheless there seem to be some dynamics which are similar in all the markets.
- » While pictures remain most popular, there is a slight decrease in the figures.
- » Different kinds of videos follow, in most markets with a slight upward trend.
- » Short texts are next in the ranking, all with showing significant decreases of their figures. Social media was and stays last in line.

- » 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 a soccer ball. Another man in a black and red jacket is running towards him. A man in a blue jumpsuit is running away from the camera. In the background, several people are watching the game. There are blue buildings with white windows and a green trash bin. The scene is set in a rugged, coastal environment with rocky hills in the background.

5. Potential travellers to Greenland: Socio-demographic profiles

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



Gender

	population	Potential travellers to Greenland	Denmark	Sweden	Norway
Male	49%	54%	54%	53%	54%
Female	51%	46%	46%	47%	46%

Age

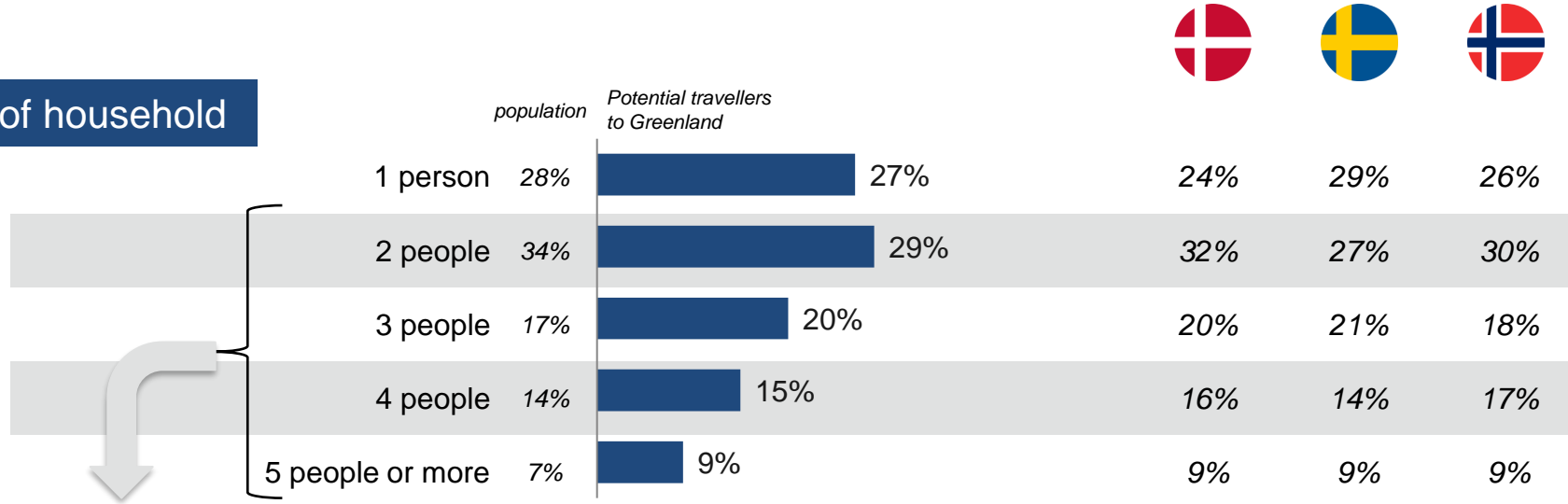
	population	Potential travellers to Greenland	Denmark	Sweden	Norway
18-29 years	21%	26%	25%	28%	24%
30-39 years	19%	23%	21%	24%	25%
40-49 years	18%	17%	17%	17%	17%
50-59 years	18%	17%	18%	17%	15%
60-74 years	24%	17%	19%	15%	19%
Average age in years	45.5	42.5	43.5	41.4	42.8

- » Potential Greenland travellers in Scandinavia are slightly more male than female. This is true for all three markets.
- » The **age structure** of potential Greenland travellers is dominated by younger travellers. Half of the potential travellers is below 40 years old. All other age groups are evenly distributed.
- » The average age of potential travellers to Greenland from Scandinavia is 42.5 years.
- » Looking at the three markets, potential travellers from Sweden are the youngest and have the highest share of the youngest age group (18-29 years).

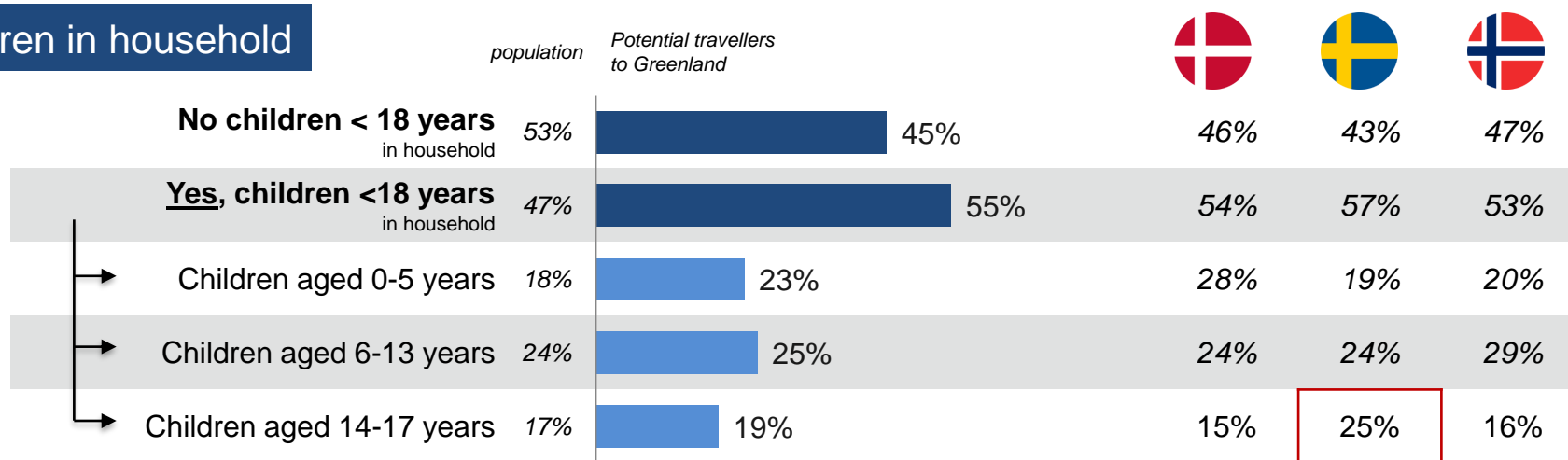
Basis: All respondents in Scandinavia (n=6,000), DK (n=2,000), SE (n=2,000), NO (n=2,000), Potential travellers to Greenland from Scandinavia (n=1,305); Denmark (n=619), Sweden (n=367), Norway (n=364); Source: Visit Greenland market study Scandinavia 2023 by NIT

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

Size of household



Children in household



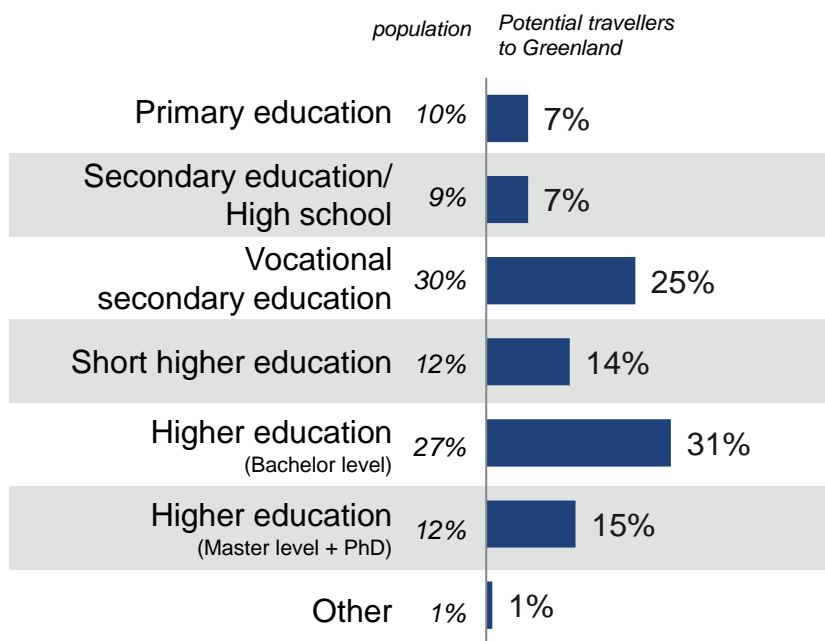
- » The biggest group of potential travellers to Greenland in Scandinavia lives in households of one or two people.
- » More than half of the potential travellers to Greenland from households with 2 or more people live with children in the household. This is a higher share than in the Scandinavian population. 23% of these potential traveller have children younger than 5 years in the household, 25% children aged from 6 to 13 and 19% have teenagers in the household.
- » Within the countries, in Sweden the share households with teenagers (14-17 years) is much higher than in Denmark and Norway.

Basis: All respondents in Scandinavia (n=6,000, with 2 or more people in household n=2202), potential travellers to Greenland from Scandinavia (n=1,305; DK: 619, SK:367; NW: 477, with 2 or more people in household, total n=960, DK n=472, SK: 259; NW: 270; Missing % to 100: No answer Source: Visit Greenland market study Scandinavia 2023 by NIT

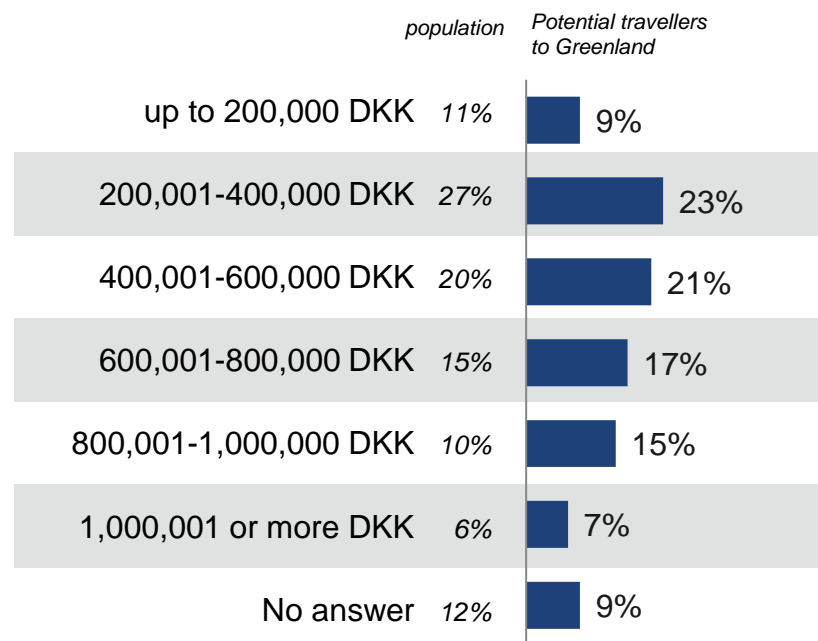
Potential travellers to Greenland from Denmark: Demographics III (education and income)



Education



Household net income per year



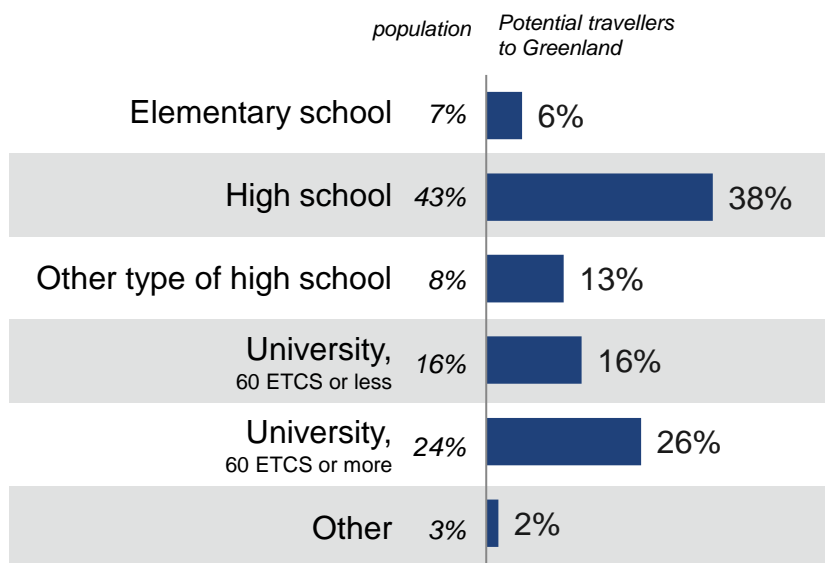
- » Regarding their **formal education**, we find that potential Greenland travellers in Denmark have a slightly higher education level as the average Danish population.
- » Almost half of potential travellers from Denmark hold a Bachelor degree or higher.
- » Looking at the **average yearly net income** per household, the biggest group amongst potential travellers to Greenland earns about 200,000-400,000 DKK, but the income groups of more than 600,000 DKK are overrepresented within the potential travellers to Greenland.

Basis: Total population (n=2,000) vs. potential travellers to Greenland from Denmark (n=576);
Source: Visit Greenland market study Scandinavia 2023 by NIT

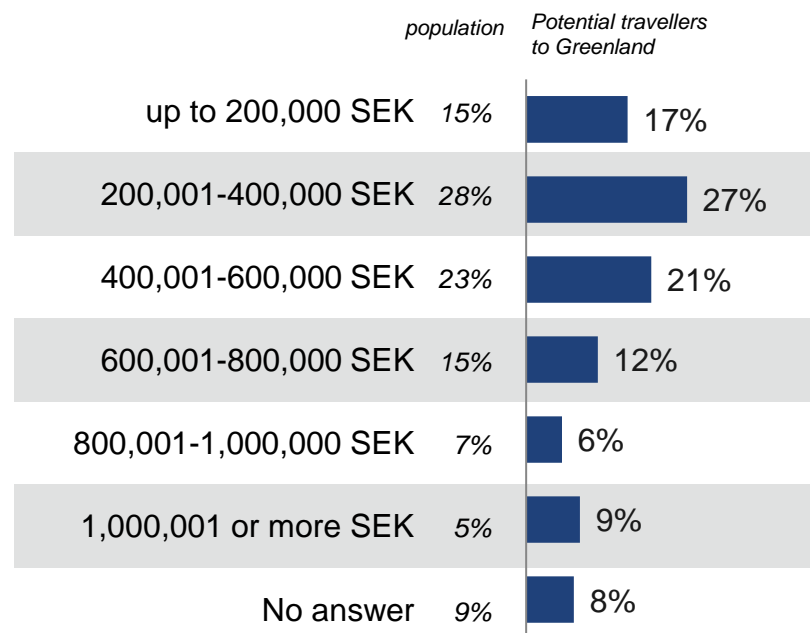
Potential travellers to Greenland from Sweden: Demographics III (education and income)



Education



Household net income per year



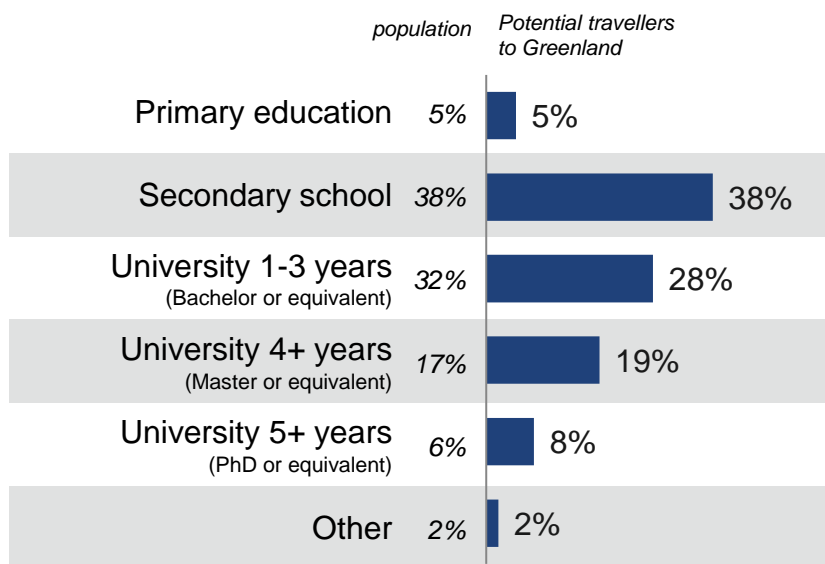
- » Regarding their **formal education**, we find that potential Greenland travellers in Sweden have a slightly higher education level as the average Swedish population.
- » More than 40% hold a Bachelor degree (60 ETCS) or higher.
- » The **income structure** of potential Greenland travellers is quite similar to that of the Swedish population.
- » The biggest group amongst potential travellers to Greenland earns about 200,000-400,000 SEK per year but the income group of more than 1 million SEK is strongly overrepresented with the potential travellers to Greenland.

Basis: Total population (n=2,000) vs. potential travellers to Greenland from Sweden (n=282);
Source: Visit Greenland market study Scandinavia 2023 by NIT

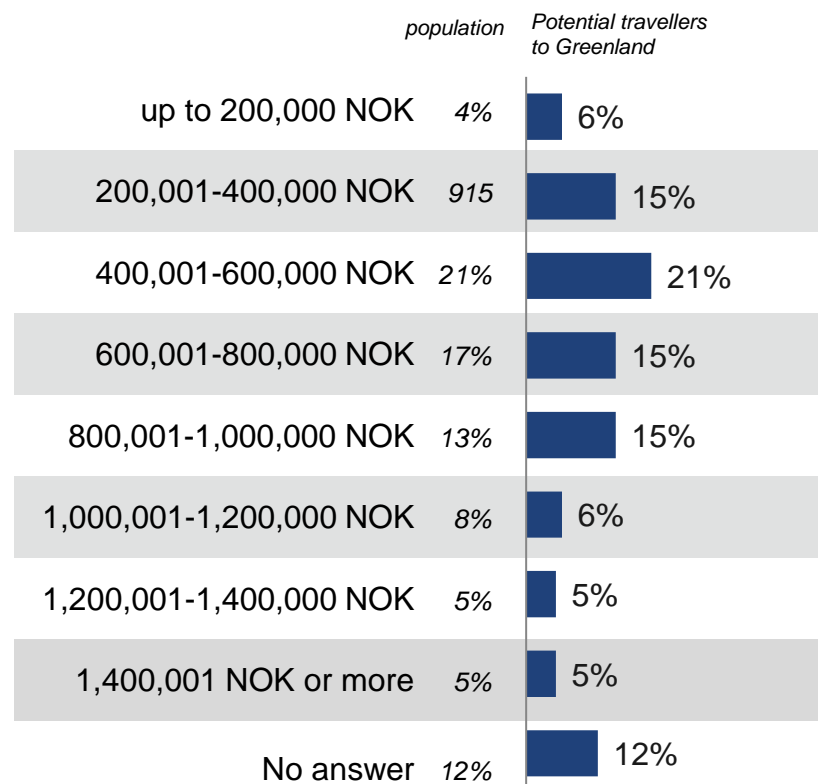
Potential travellers to Greenland from Norway: Demographics III (education and income)



Education



Household net income per year



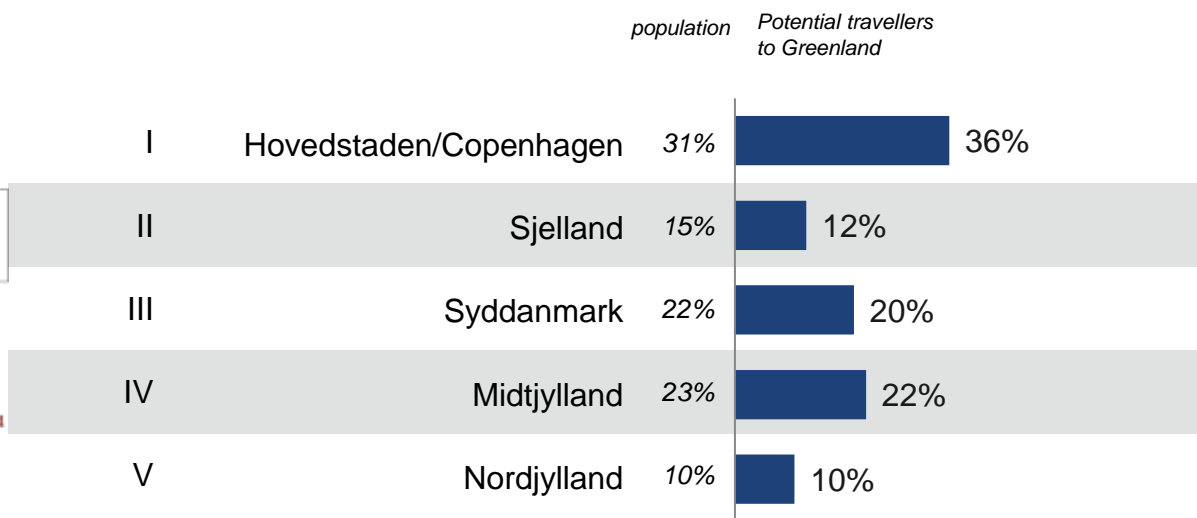
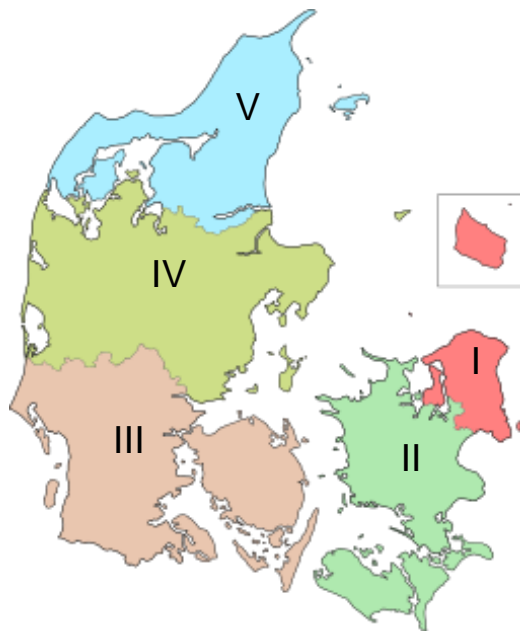
- » Regarding their **formal education**, we find that potential Greenland travellers in Norway have a slightly higher education than the average Norwegian person.
- » More than half hold an academic degree (Bachelor or higher).
- » The **income structure** of potential Greenland travellers is quite similar to that of the Norwegian population.
- » The biggest group amongst potential travellers to Greenland earns about 400,001-600,000 NOK per year.

Basis: Total population (n=2,000) vs. potential travellers to Greenland from Norway (n=364);
Source: Visit Greenland market study Scandinavia 2023 by NIT

Potential travellers to Greenland from Denmark: Demographics IV (regions)



Regions



» The regional spread of potential travellers to Greenland in Denmark shows a slight concentration with the capital region of Copenhagen with more than one third of the potential travellers living there. More than 40% live in Central or South Denmark.

Basis: Total population (n=2,000) vs. potential travellers to Greenland from Denmark (n=619);
Source: Visit Greenland market study Scandinavia 2023 by NIT

Potential travellers to Greenland from Sweden: Demographics IV (regions)



Regions



		population	Potential travellers to Greenland
1	South	15%	16%
5	Middle	12%	13%
4	East	32%	38%
3	West	20%	20%
6	North	9%	5%
2	South East	13%	8%

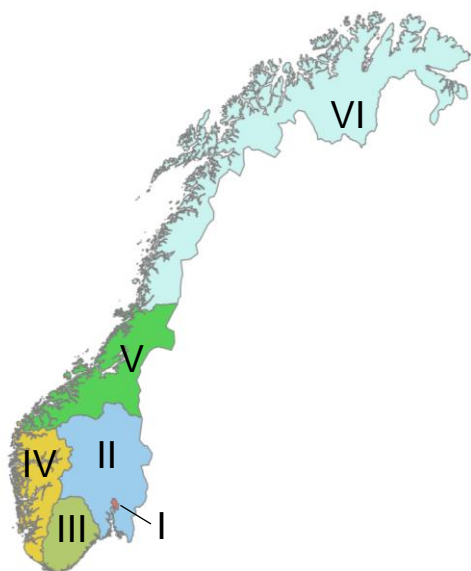
» The regional spread of potential travellers to Greenland in Sweden shows a slight concentration with the capital region of Stockholm.

Basis: Total population (n=2,000) vs. potential travellers to Greenland from Sweden (n=367);
Source: Visit Greenland market study Scandinavia 2023 by NIT

Potential travellers to Greenland from Norway: Demographics IV (regions)



Regions

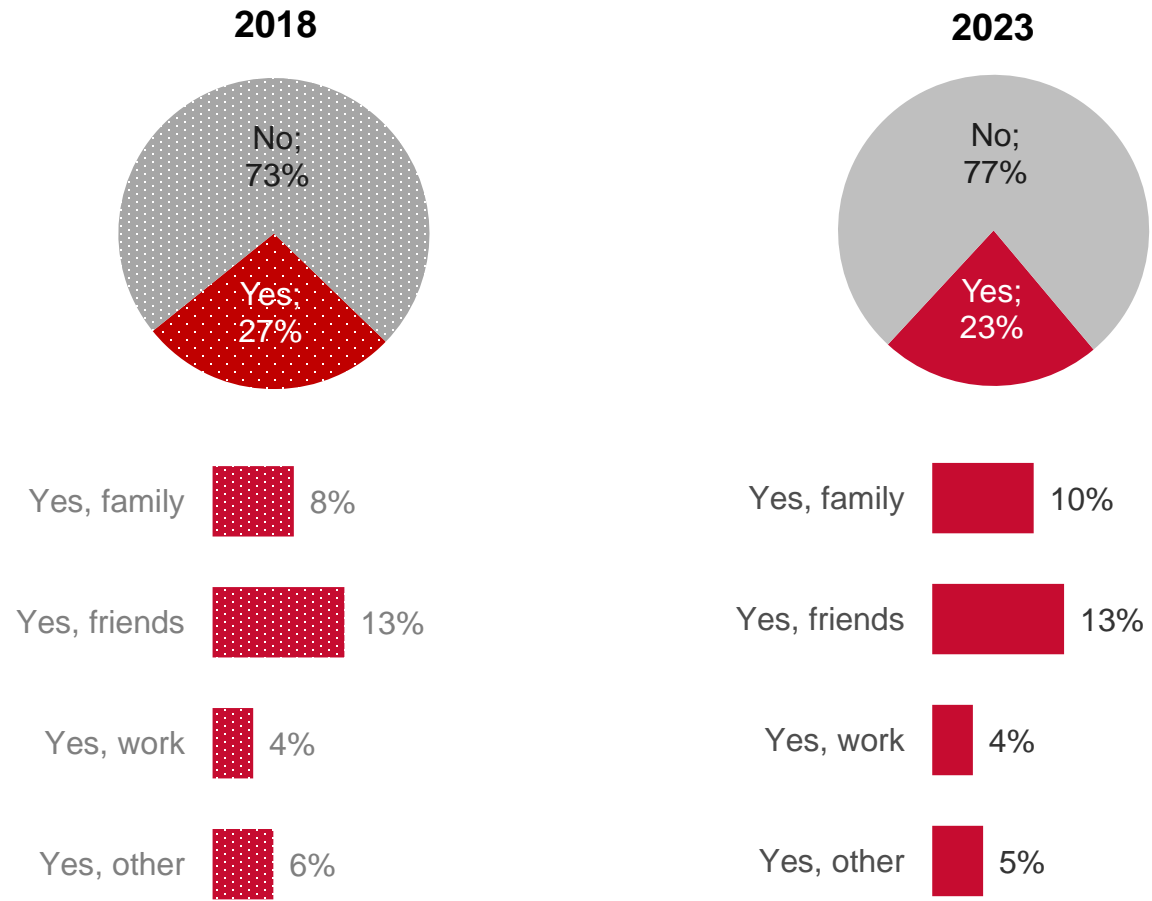


		population	Potential travellers to Greenland
I	Oslo	11%	15%
II	Eastern Norway	29%	27%
III	Southern Norway and Telemark	10%	9%
IV	Western Norway	24%	25%
V	Trondelag (Mid Norway)	16%	12%
VI	Northern Norway	11%	11%

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

Basis: Total population (n=2,000) vs. potential travellers to Greenland from Norway (n=364);
Source: Visit Greenland market study Scandinavia 2023 by NIT

Personal ties to Greenland within the potential travellers to Greenland in Denmark



- » This questions covers the personal ties to Greenland of the potential travellers to Greenland from Denmark.
- » In Denmark, 23% of the potential travellers to Greenland have personal connections to Greenland, most of them are friends or family.
- » Compared to 2018 the share of those with personal ties to Greenland has decreased from 27% to 23%.

Q: Do you have any personal ties/connections to Greenland?
 Basis: Potential travellers to Greenland in Denmark (n=619)
 Source: Visit Greenland market study Scandinavia 2023 by NIT; Visit Greenland/Air Greenland market study Scandinavia 2018 by NIT

To learn 5: Potential travellers to Greenland

Socio-demographic profiles



- » Gender: Potential Greenland travellers are slightly more often male than female, this is true for all three markets.
 - » Age: The age structure of potential Greenland travellers is dominated by younger travellers. Half of the potential travellers is below 40 years old. The average age of potential travellers to Greenland from Scandinavia is 42.5 years. Looking at the three markets, potential travellers from Sweden are the youngest (41.4 years) and from Denmark the oldest (43.5 years).
 - » Size of household and children in household: The biggest group of potential travellers to Greenland lives in households of one or two people. More than half of the potential travellers not living alone live with children in the household. This is a higher share than in the Scandinavian population. 23% of these potential traveller have children younger than 5 years in the household, 25% children aged from 6 to 13 and 19% have teenagers in the household. Within the countries, in Sweden the share households with teenagers (14-17 years) is much higher than in Denmark and Norway.
 - » Education: Regarding their formal education, we find that potential travellers from Denmark, Sweden and Norway have a slightly higher education level as the population in general.
 - » Annual household net income: In all three markets the income structure does not differ much from the population. There are general differences between the countries, though. While in Denmark and Sweden most persons can be found in the middle income groups, in Norway the higher income groups dominate slightly.
 - » Regional structure: Again the regional distribution of the potential Greenland travellers in all three markets does not differ much from the population. In all three markets, the more densely populated areas such as the capital regions with the easiest access to overseas travel are slightly overrepresented.
- » In most regards, the demographic profiles of potential Greenland travellers in Scandinavia 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, and a bit higher income).

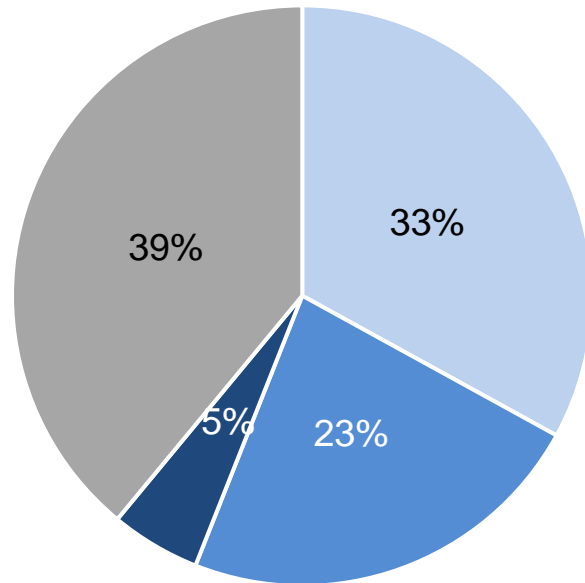
6. Segmentation: Adventure & Sustainability



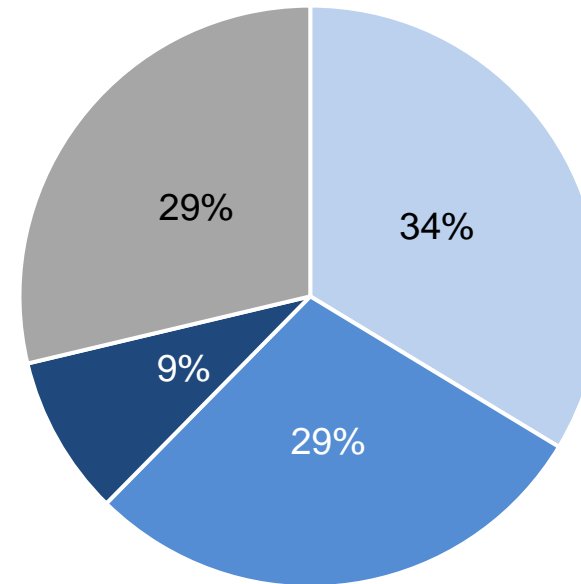
Visit Greenland adventurer segments



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 (39%) than for potential travellers (29%).
- » With the potential travellers, 34% belong to the “soft adventurers”, 29% to the “immersive” and 9% to the “ultimate adventurers”.
- » There are no big differences between the three countries.

<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?*

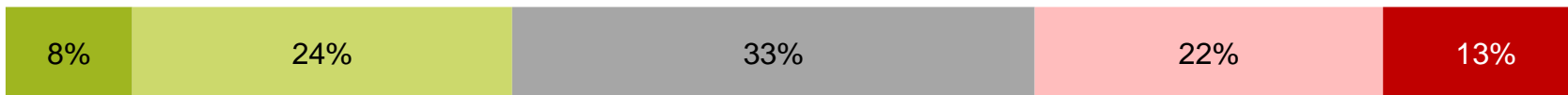
Basis: All respondents in Scandinavia (n=6,000), potential travellers to Greenland from Scandinavia (n=1,305), potential travellers with at least two mentioned experiences (n=960); Source: Visit Greenland market study Scandinavia 2023 by NIT

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

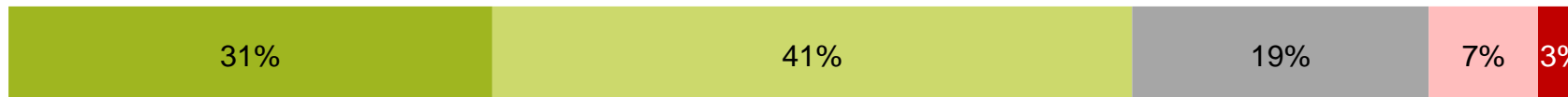


My holiday should be as **socially acceptable** as possible (i.e. fair working conditions for staff and respect for the local population).

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 Scandinavia have a more pronounced attitude towards sustainability than the Scandinavian population in general.
- » Almost half of the potential travellers prefer their holiday to be ecologically sound and more than two third would like it to be socially acceptable. This share is a bit lower in the Scandinavian population overall.
- » In Norway and Sweden ecological sustainability is slightly more important than for the Danish. Regarding social sustainability there are no differences between the three countries.

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 Scandinavia (n=6,000) and potential travellers to Greenland in Scandinavia (n=1,305)

Source: Visit Greenland market study Scandinavia 2023 by NIT

To learn 6: Segmentation: Adventure & Sustainability



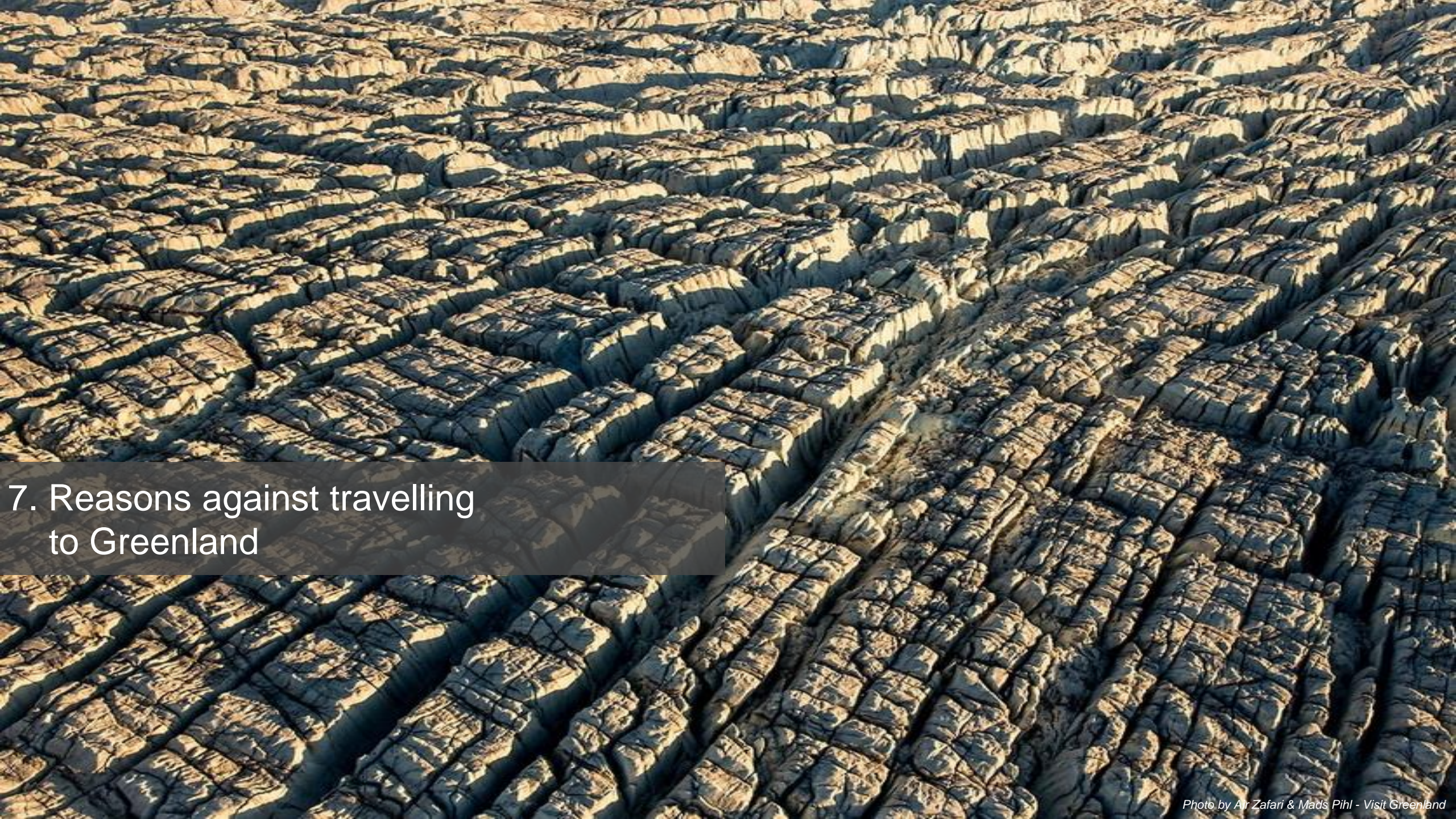
Visit Greenland adventure segmentation:

- » Looking at the population in Scandinavia, there is a high share of non-adventurers (39%), this is followed by the soft adventurers (33%). One fourth of the population (23%) are immersive adventurers and only 5% consider themselves as ultimate adventurers.
- » Looking at the potential Greenland travellers in Scandinavia, the share of non-adventurers is 29%. The Soft Adventurers are dominating with a share of 34%, closely followed by the immersive adventurers with 29%. 9% are ultimate adventurers.
- » Looking at the differences between the population and the potential travellers, you find that the potential travellers have higher shares of all adventurer types.

Attitudes towards sustainability

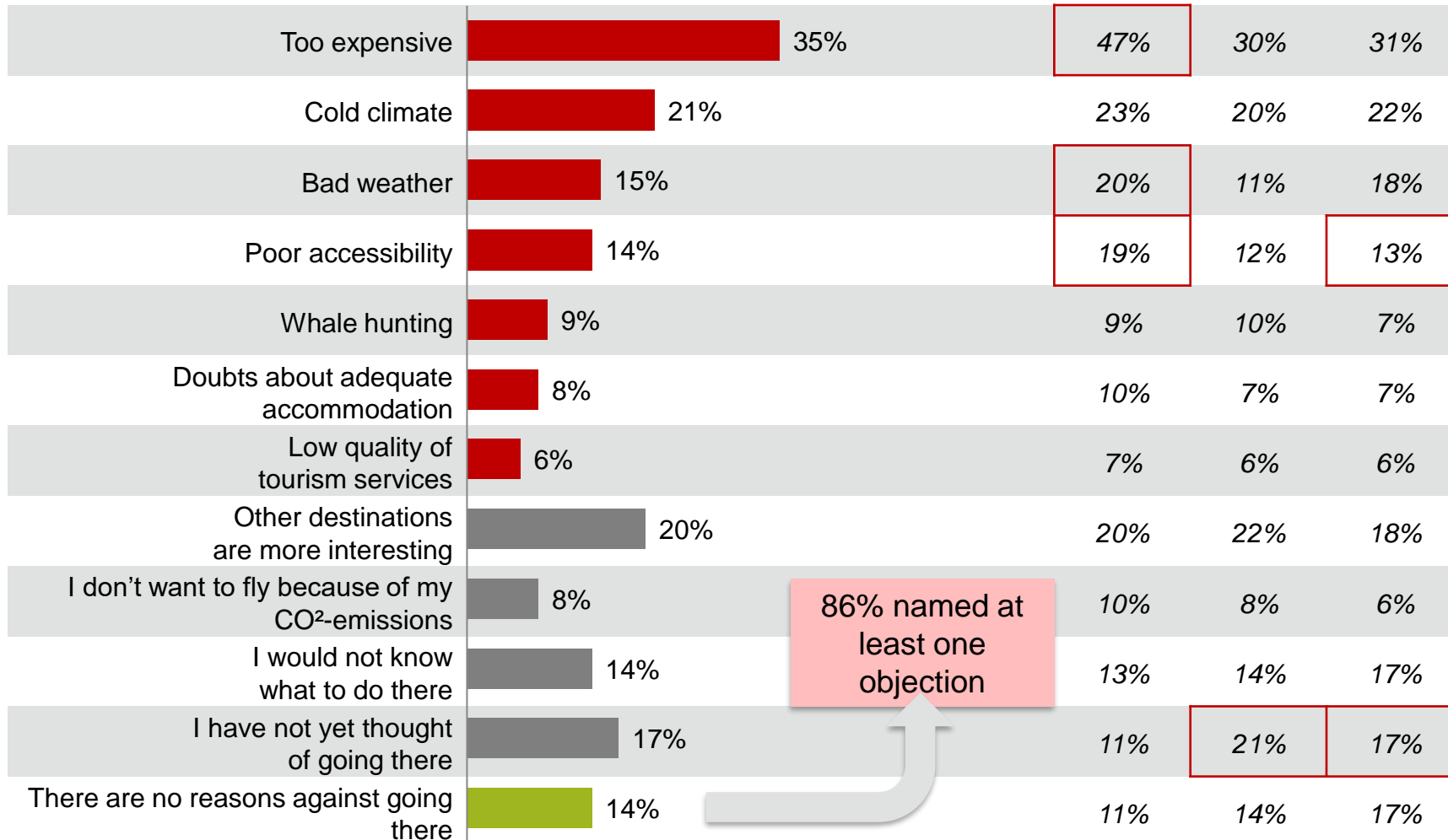
- » Potential Greenland traveller of Scandinavia have a more pronounced attitude towards sustainability than the Scandinavian population in general.
- » Almost half of the potential travellers prefer their holiday to be ecologically sound and more than two third would like it to be socially acceptable.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

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



7. Reasons against travelling to Greenland

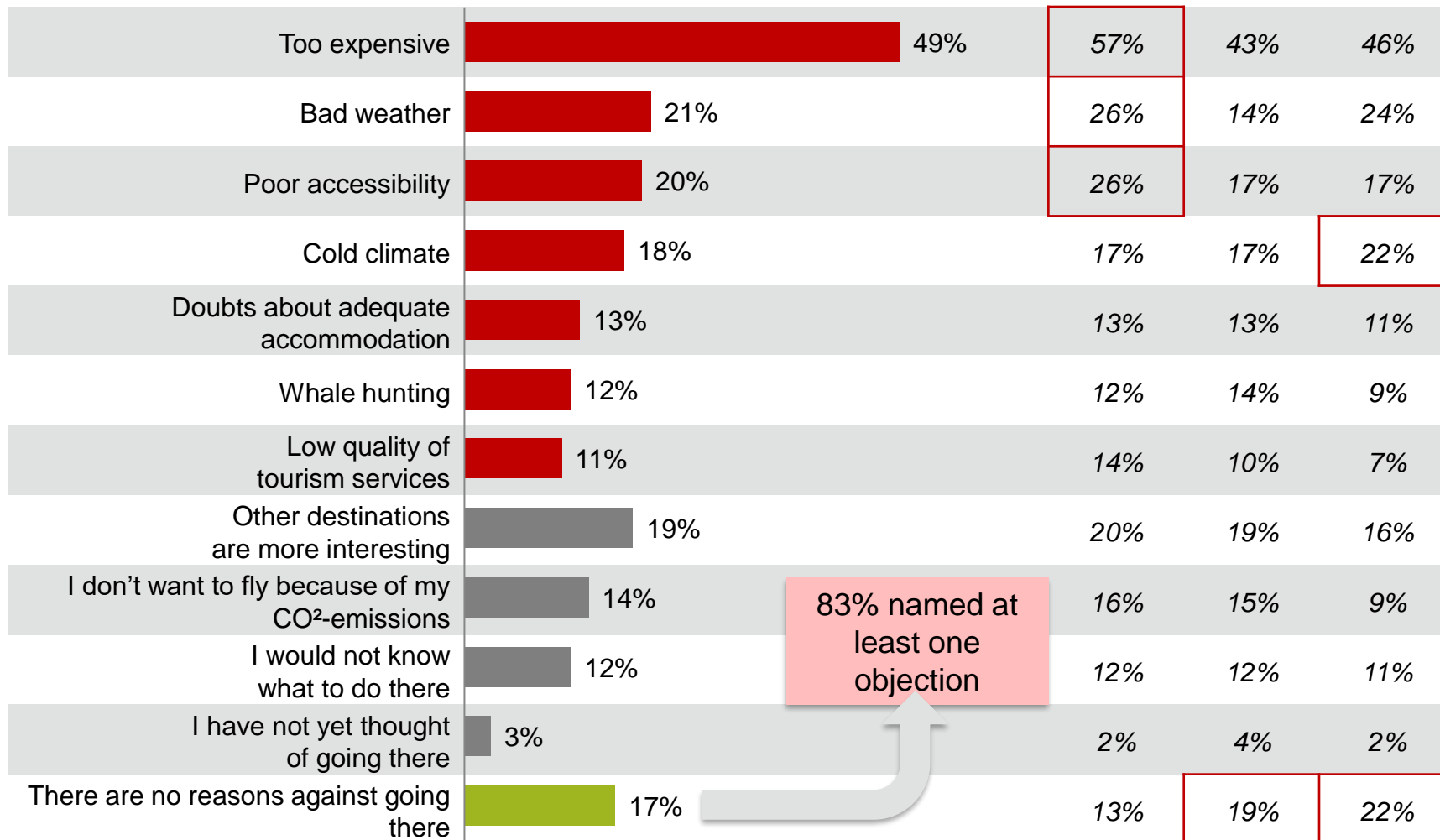
Reasons against travelling to Greenland (*population*)



- » One of the final questions in the survey examines reasons against travelling to Greenland.
- » The good news first: 14% of the Scandinavians have no general objections to travel to Greenland. In turn, this means that 86% of the population named at least one objection against travelling to Greenland.
- » Most important reasons against travelling to Greenland are the expected high costs, followed by the coldness, bad weather and poor accessibility.
- » The Danish find more reasons against travelling and name the price, poor accessibility and bad weathers more often as reasons than the other markets.
- » There are also important factors in place, that are not directly linked to the tourism offer in Greenland (grey).

What are in your opinion reasons against travelling to Greenland?
 Basis: All respondents in Scandinavia (n=6,000)
 Source: Visit Greenland market study Scandinavia 2023 by NIT

Reasons against travelling to Greenland (potential travellers to Greenland)



- » Even more important is to understand what stops those interested in travelling to Greenland from going there.
- » Among the potential travellers in Scandinavia almost one fifth sees no reason to not travel to Greenland (17%). This indicates that even among the potential travellers to Greenland 83% have at least one objection against going there.
- » For the rest the main barrier seems to be the price. 49% of the potential travellers consider Greenland as “too expensive”. Here figures are much higher than in the population and follow a similar pattern within the markets.
- » Three other important barriers are the bad weather, poor accessibility and cold climate.

What are in your opinion reasons against travelling to Greenland?
Basis: Potential travellers to Greenland from Scandinavia (DK, SE, NO; n=1,305); Denmark (n=619), Sweden (n=367) and Norway (n=364); ; Source: Visit Greenland market study Scandinavia 2023 by NIT

To learn 7: Reasons against travelling to Greenland



Population:

- » 14% of the Scandinavians 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 the Scandinavian 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 Scandinavia almost one fifth sees no reason to not travel to Greenland (17%).
- » For the rest the main barrier seems to be the price. 49% of the potential travellers consider Greenland “too expensive”. Here figures are much higher than in the population. Three other important barriers are the bad weather, poor accessibility and cold climate.
- » However, there are more doubts about the quality of tourism services and accommodation adequateness among the potential travellers than in the general population.
- » Overall, the Danish name more reasons against travelling to Greenland and mention the top 4 reasons against travelling considerably more often than the Swedish and Norwegian.

- » The results of Chapter 1 show a huge potential of people interested to travel to Greenland in the Scandinavia.
- » To transform these potential guests into actual ones, it is not only important to know who they are (chapter 5) 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 and within the markets, 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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