# Travel habits and preferences for previous and potential guests in Greenland.

ONLINE SURVEY 02-2023

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# Introduction

**Second round of the survey in collaboration with Greenland Travel**
In September 2021, Visit Greenland (VG) conducted a major survey in collaboration with Greenland Travel (GT) aimed at previous and potential tourists in Greenland. Recruitment took place via VG's and GT's customer-oriented newsletters, via the visitgreenland.com website and via Facebook ads.

There were 3 language versions: Danish, English and German. The Danish language version was completed by 3,100 respondents, of whom 2,157 (69.6%) have visited Greenland. The English version was completed by 2,034 respondents, of whom 623 (30.6%) have visited Greenland. The German language version was completed by 633 respondents, of whom 180 (28.4%) have visited Greenland.

In 2021, there was a total of 5,767 respondents, of whom 2,960 had visited Greenland.

In February 2023, VG and GT jointly conducted the second round of the survey consisting of more or less identical questions. This time, there were 3,668 respondents to the Danish language version, 5,514 to the English version and 1,783 to the German survey – i.e. a total of 10,965, which corresponds to 90% more than in 2021.

2,655 respondents to the Danish language survey, 535 respondents to the English language survey and 210 respondents to the German language version have visited Greenland, which makes up 3,400 in total, corresponding to 31% of the respondents.

For respondents to the Danish language version, no less than 72.4% have visited Greenland before, which is considerably higher than the figures that apply to respondents to the English version (9.7%) and to the German version (11.4%).

**Methodology**
The questions in this survey (Feb 23) are almost identical to the questions in the previous survey (2021). This time, however, we have asked the respondents to answer the demographic question (Q6 on household income) by choosing one of 15 predefined income ranges (+ 'Will not disclose') – in contrast to 2021, when we asked them to choose one of the following possibilities: Below average, Average, Above average and Well above average (+ 'Will not disclose'). The first method above enables a more accurate estimate of the various segments' average household income.

**The economic impact of tourism in Greenland**
In 2022, Visit Greenland became involved in the inter-Nordic project 'Measuring Regional Tourism and Tourism's Environmental Impact', which has two objectives: 1) To measure tourists' economic impact on the economy via either a Regional Tourism Account or national TSA; 2) To develop a method to measure tourists' carbon footprint.

The project is primarily funded by the Nordic Council of Ministers and is due to run during the period 2022-2024. Greenland will thus have its first Tourism Satellite Account drawn up. A national TSA will be produced based on new and experimental data sources: 1) Financial transactions carried out via debit card and credit card (data from Mastercard and Visa, which have a combined 90% share of the market); 2) Roaming data for mobile phones that roam on Tusass' (previously known as Tele Greenland) mobile network. Greenland's first TSA will not be published until the end of 2024, however.

Until then, the survey in 2023 will be able to provide an estimate of tourists' daily consumption, travel behaviour, preferences in terms of things to experience, segmentation, etc.

# Executive summary (1)

As was the case for the survey in 2021, the results of this survey broadly confirm the assumptions and previously collected data concerning both previous Greenland tourists and potential Greenland tourists.

**Theme 1: Demography**
For Danish-language respondents (DA), we have a 'skewed' group in terms of age distribution. There is a strong over-representation of older age groups, which appears to push the results in a more 'conservative' direction in terms of travel habits, preferences, etc. For English-language (EN) and German-language (DE) respondents, we have a more representative sample age-wise.

For all respondents there is an almost equal distribution between respondents that live in small towns and villages, those that live in provincial towns and respondents that live in large cities. There is some over-representation of people with higher education and income, although for DE respondents there is a significant portion (20.4%) that have only completed a youth programme of further education. With regard to household income, our samples also appear relatively representative, although for DA and EN a slightly higher proportion have high incomes, whereas this does not appear to be the case for DE – with the proviso that no less than 37.5% of DE do not wish to disclose their household income.

**Theme 2: General travel habits**
For all 3 language versions, we see that most people typically take 2-4 trips abroad each year. The majority put together their own trips and purchase them directly online from the provider, although DA respondents are more likely to buy through a travel agency, probably because we have an older sample than EN and DE.

**Theme 3: Segmentation**
The distribution of our 3 main segments reveals an over-representation of Immersive Adventurers (DA: 63.6%, EN: 56.6%, DE:47.1%), a medium-sized proportion of Soft Adventurers (DA: 26.2%, EN: 31.3%, DE: 44.1%), whilst the Ultimate Adventurers segment makes up the smallest segment (DA: 11.8%, EN: 18.5%, DE: 19.3%).

**Theme 4: Transport & logistics**
These questions are, of course, reserved for respondents who have previously visited Greenland. Not surprisingly, DA respondents travelled overwhelmingly via Copenhagen (89.3%). For EN respondents, around half (49.2%) travelled via Copenhagen, with the remainder travelling via Iceland. Surprisingly, more than half of the respondents from North America travelled to Greenland via Copenhagen.
68.6% of DA, 52.3% of EN and 55.7% of DE spent at least 9 nights in Greenland.

**Theme 5: Experiences and products**
Nature and natural phenomena were the main reasons for visiting Greenland (DA/EN/DE), whilst 'I have been fascinated by Greenland for a long time' came in at number two. 5.8% of EN and 8.1% of DE think that Greenland has an atmosphere of magic and mystery (DA only 1.7%). 17.6% of DA, 6.1% of EN and 1.4% of DE wanted to visit friends and family.
The 4 most popular products (DA/EN/DE) are a good mix of nature and culture-based experiences: 1) Sailing tours; 2) Visits to museums; 3) Visits to settlements; 4) Guided tours to the Ice Sheet.

**Theme 6: Booking the trip and consumption**
The vast majority (DA/EN/DE) booked the trip between 1 and 12 months before departure, although DE had a tendency to book a long time before DA and EN. DA predominantly booked through a travel agency, whilst EN and DE primarily booked directly online with the provider.

# Executive summary (2)

DA and EN spent an average of around DKK 20,000/person on the trip as a whole and between DKK 500 and DKK 1,000/day/person (excl. transport and overnight accommodation). DE was slightly higher than DA and EN.

**Theme 7: Subjective experiences**
For DA, 'Recommendations from family and friends' (word of mouth) is clearly the major source of inspiration. For EN and DE, travel books and TV documentaries (and other visual content) make up the biggest source of inspiration.
Iceland, Svalbard and Norway made up the top 3 alternative destinations that were also considered when the respondents were deciding whether to travel to Greenland (DA, EN, DE).
Of the 'Best experiences in Greenland', there was general agreement that 'The trip as a whole' was the best. For DA, 'Nature and Natural phenomena' ranks second, whilst for EN and DE 'Ice' occupies second place.
'Delays and cancellations' and 'Mosquitoes/flies' fill the first two places in terms of negative experiences. In third and fourth places come 'Litter' and 'Social problems'.
The citizens of Greenland are regarded as extremely hospitable (DA: 79.6%, EN: 84.2%, DE: 84.2%), whilst the majority have not experienced language difficulties (DA: 89.5%, EN: 86.5%, DE: 93.1%).
Greenland scores very high on 'Satisfaction with the trip to Greenland'. DA: 80.7% score 5/5, whilst 16.7% score 4/5. EN: 78.4% score 5/5, whilst 18.8% score 4/5. DE: 81.3% score 5/5, whilst 13.8% score 4/5.

**Theme 8: Respondents that have not visited Greenland**
Of the respondents yet to visit Greenland, almost all of them wanted to visit Greenland, which once again makes sense, as they were recruited via media that have Greenland as a theme, in addition to the fact that there was a gift voucher for travel to Greenland on offer. The majority wanted to visit Greenland more than one year from now (DA: 39.6% 1-2 years from now, 33.3% more than 2 years from now. EN: 33.2% 1-2 years from now, 57.9% more than 2 years from now. DE: 39.3% 1-2 years from now, 36.7% more than 2 years from now.)

There is great similarity between the segments in terms of preferences for which time of the year they wish to visit Greenland (DA: winter 18.2%, spring 32.2%, summer 33.6%, autumn 16.0%. EN: winter 19.3%, spring 26.1%, summer 33.8%, autumn 20.8%. DE: winter 22.4%, spring 24.9%, summer 34.8%, autumn 17.9%), and compared to the results from 2021 there is now a more even distribution between the preferred seasons, i.e. not such a predominant preference for the summer season.

The most popular products (in order) are the Northern Lights, the Ice Sheet, Wildlife safari, Dog-sled tours, Hiking, Visiting a settlement, Hot springs, Sailing trips and Visiting Viking/Norse ruins.

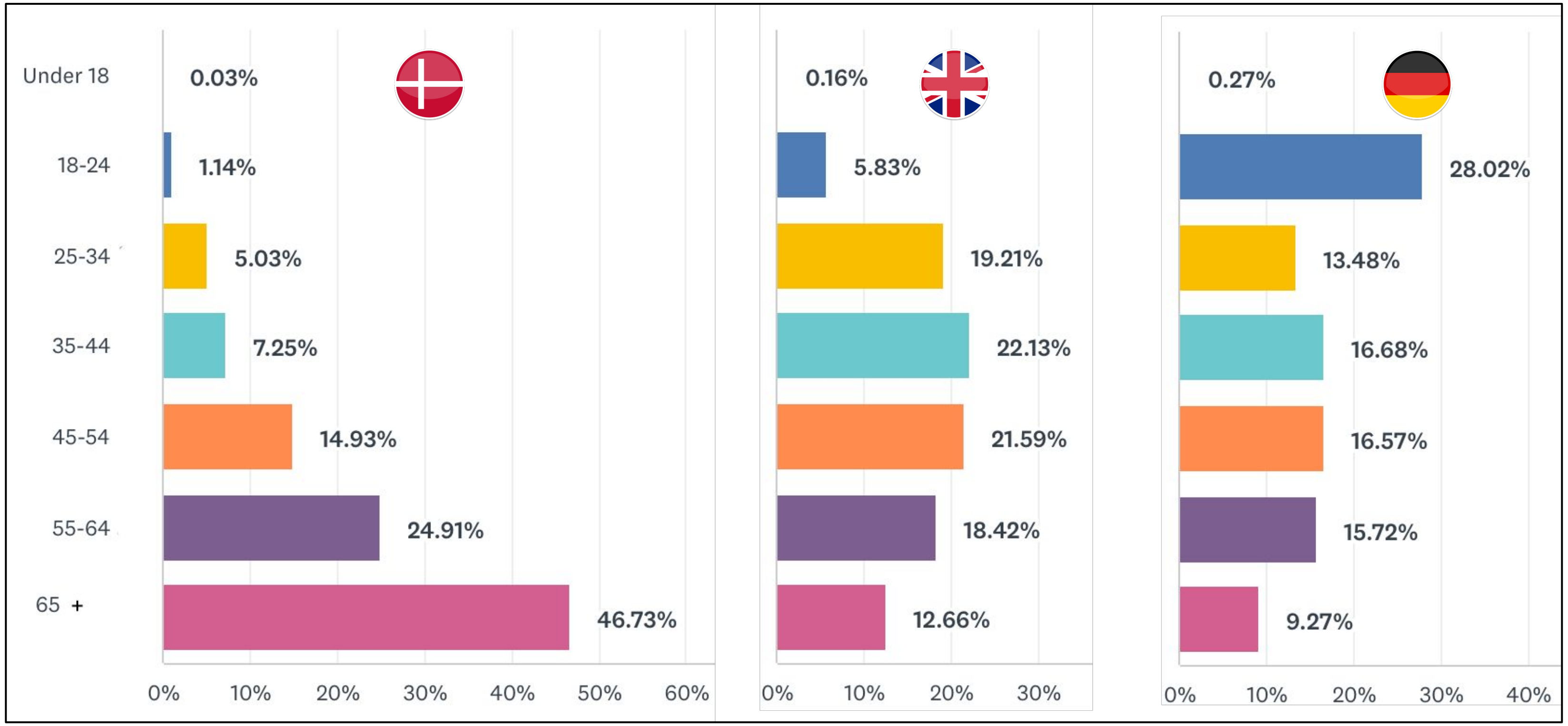
DA primarily expect to purchase the trip via a travel agency (65.4%). EN primarily expect to purchase directly online from the provider (55.1%). DE expect to both book directly through a provider (41.7%) and via a third-party travel portal (29.1%).

DA (48.8%) prefer a hotel, followed by a hotel apartment and B&B. EN have more or less the same preferences as DA. DE also primarily prefer a hotel (59.4%), albeit closely followed by B&B (47.9%) and hotel apartment (37.7%), whilst a surprisingly large number (29.3%) prefer camping in the wilderness.

'Nature and natural phenomena' is by far the biggest reason for interest in visiting Greenland (DA: 64.1%, EN: 67.4%, DE: 73.9%). For DA, 20.2% have 'been fascinated by Greenland for a long time', whilst for EN (10.2%) and DE (13.5%) the feeling that 'Greenland has an atmosphere of magic and mystery' is a source of interest.

For the few who are currently not interested in visiting Greenland, this is primarily because it is 'too expensive' (DA: 74.2%, EN: 40.9%, DE: 88.9%). Secondly, 'seems to be too difficult to travel around' (DA: 16.1%, EN: 20.6%, DE: 8.4%) is given as a reason, whilst third place goes to 'would rather travel to warmer destinations' (DA: 9.7%), EN: 27.0%, DE: 9.7%).

# Q2: Age (Question 1 concerned consent with regard to storage of email address)



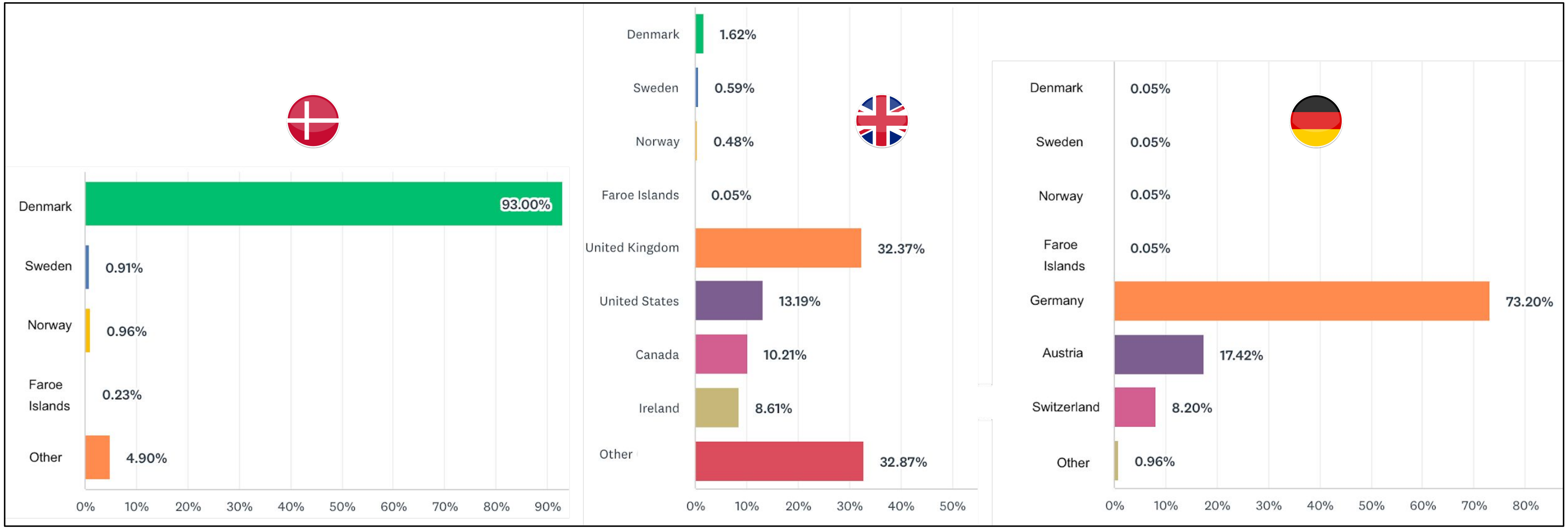

**Overall remarks**

- **Danish-language respondents** (DA): There is a strong over-representation of the 3 oldest age groups seen in relation to the normal distribution in the population. This is probably due to the fact that many of the Danish-language respondents are recruited via GT and VG's customer-oriented newsletters, and that many of these are so-called 'Greenland fans' who have visited Greenland at least once before.
- **English-language respondents** (EN): There is an even distribution between age groups, although not that many below 25 years of age or in the 65+ age group.
- **German-language respondents** (DE): Here we see an over-representation of the 18-24 age group and a slight under-representation of the 65 + age group.

**In perspective**

The fact that 72.4% of DA have been in Greenland may be one of the explanations as to why the older segments are strongly over-represented. There were many EN respondents (5,514) and many of them were recruited via Facebook ads, which probably helps to make this sample more balanced in terms of age, as the adverts were aimed at attracting a balanced age group. It is not possible to identify a cause for the over-representation of 18-24-year-olds in the DE sample.

# Q3: Country of residence



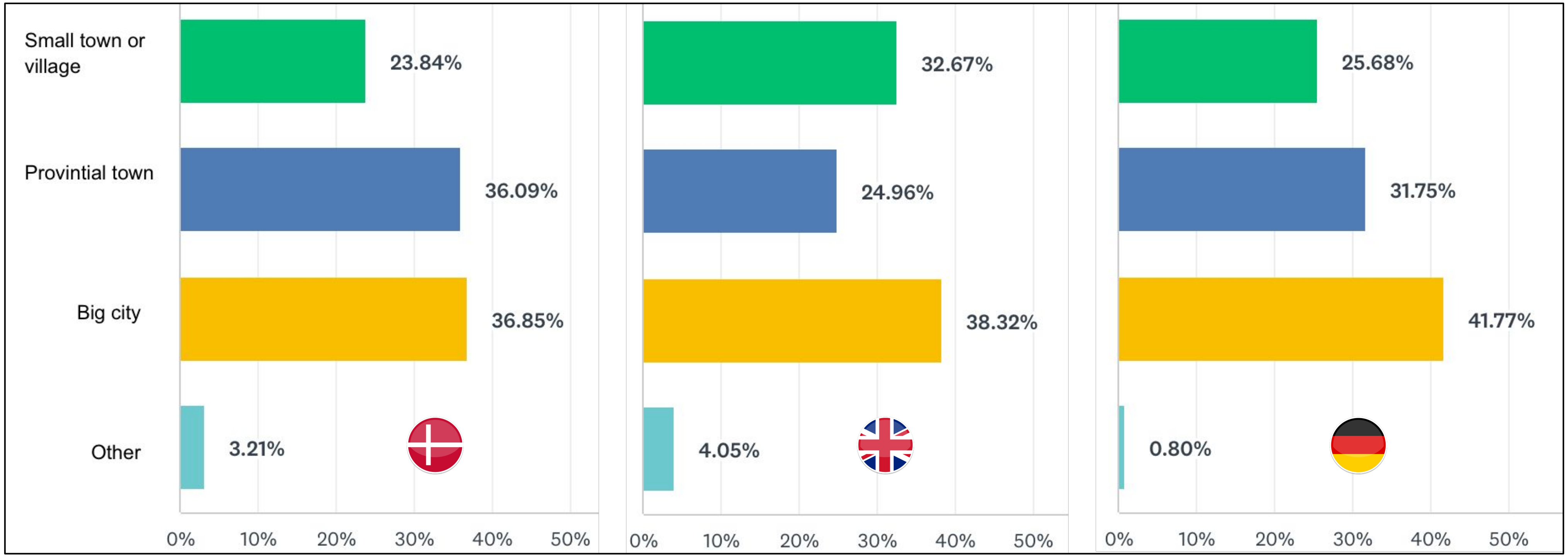

**Overall remarks**

- **DA**: Unsurprisingly, the country of residence for almost all respondents is either Denmark or Greenland, since completion of the DA survey requires proficiency in Danish.
- **EN**: It has to be assumed that those that have taken the EN survey either speak English, or at least do not speak Danish or German. There is a somewhat expected distribution of citizens in the four English-speaking countries GB, US, CA and IE, although with an over-representation of citizens from GB.
- **DE**: A somewhat expected distribution between citizens from the 3 German-speaking countries DE, AT and CH, although the populations of AT and CH are approximately the same (around 9 million), which means that either AT is slightly over-represented or CH is slightly under-represented.

**In perspective**

There is a somewhat expected distribution of respondents from the different countries. As expected, the English-language questionnaire has the most diverse international representation. The countries that are most represented in the 'Other' category are Spain, the Netherlands, France, Italy and Australia.

# Q4: Type of residence



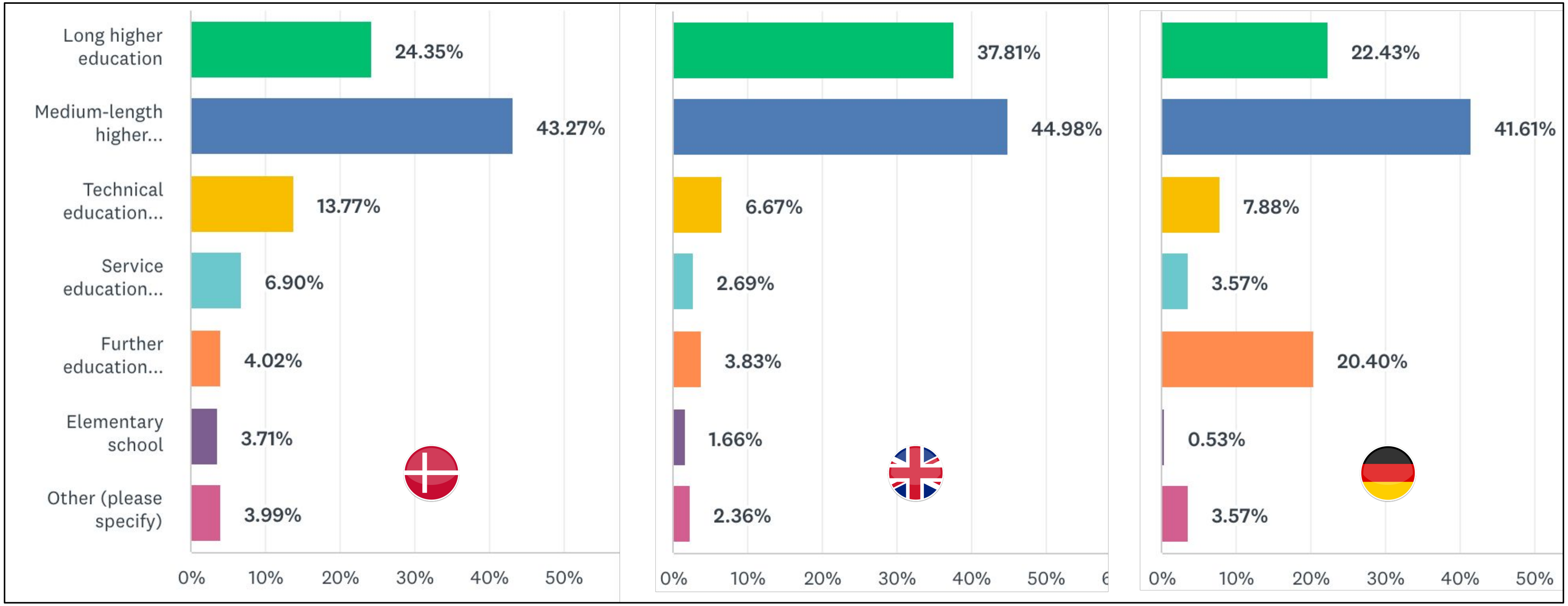

**Overall remarks**

- **DA**: A slight under-representation of respondents from small towns or villages.
- **EN**: Over-representation of respondents from big cities. It is surprising that the ‘Small town or village’ group is 7 per cent higher than 'Provincial town'.
- **DE**: The sample tips towards over-representation of respondents from big cities.

**In perspective**

Overall, there is a more or less representative distribution between respondents from small towns and villages, provincial towns and big cities respectively, which is satisfactory.

# Q5: Education level




**Overall remarks**

- **DA**: Strong over-representation of respondents with the highest levels of education.
- **EN**: Strong over-representation of respondents with the highest levels of education. Respondents with 'Long higher education' have even greater over-representation than DA.
- **DE**: A surprisingly large percentage of respondents who have 'only' completed a youth programme of further education, although this is probably due to the over-representation of 18-24-year-olds.

**In perspective**

These results are broadly in line with trends from previously collected data, and are surprisingly close to the results from the previous survey in collaboration with GT and VG – which is probably due to the fact that there are many returning respondents.

# Q6: Income group

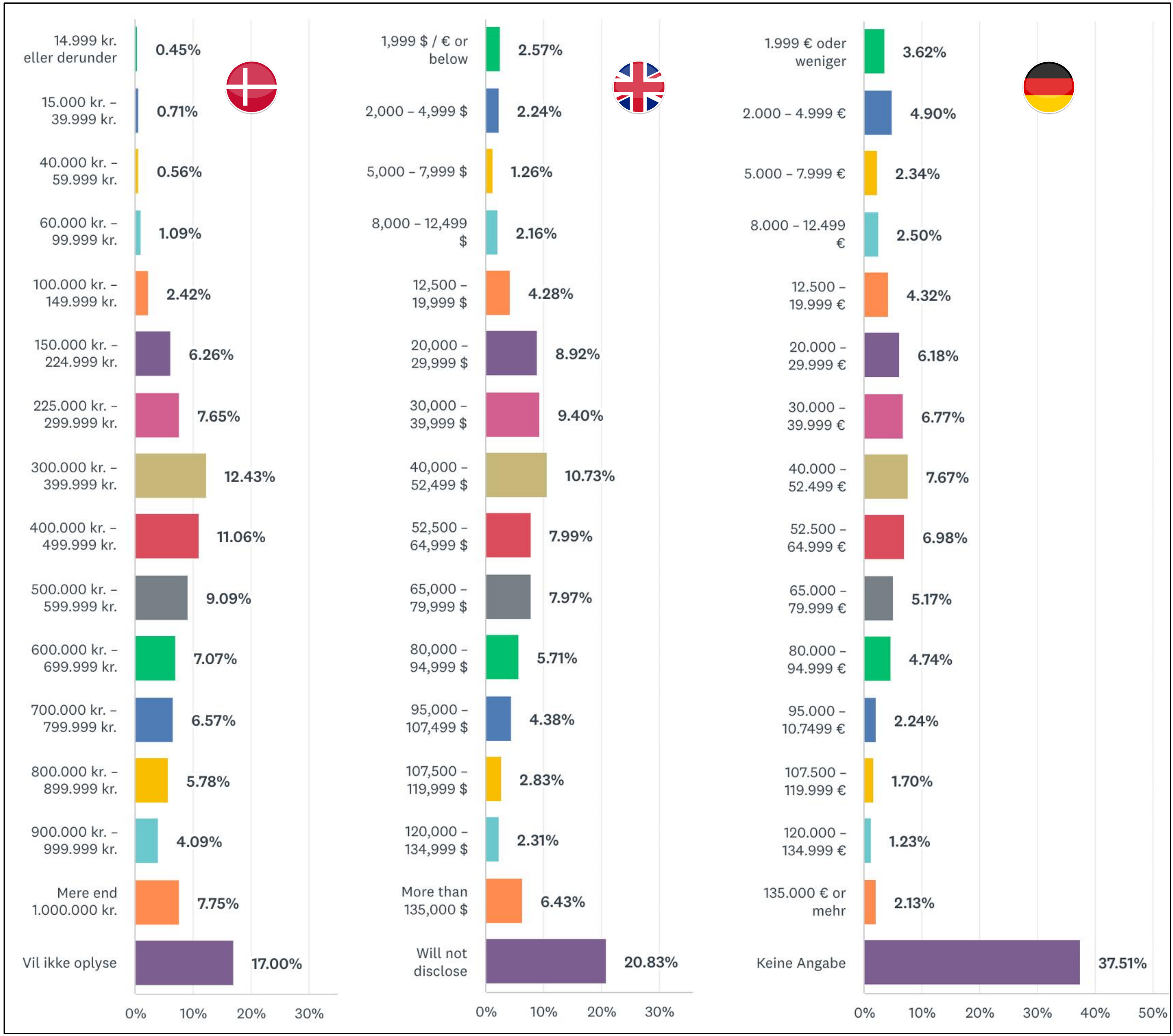
**Overall remarks**

- **DA**: The data more or less follows a 'normal distribution curve' – apart from a slight over-representation of respondents with more than DKK 1 million/year in household income.
- **EN**: Same trend as DA, although with a slightly smaller over-representation of respondents with more than $ 135,000/year in household income.
- **DE**: A more or less 'normal distribution curve', although with a slight over-representation of the lowest income groups.

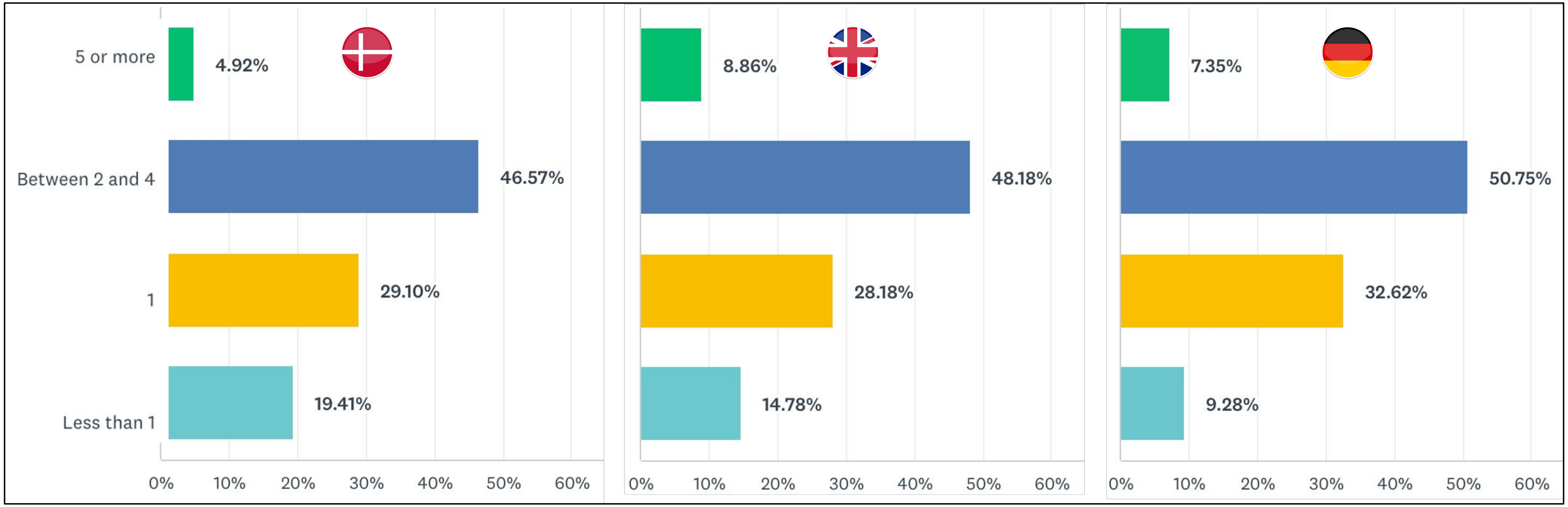
**In perspective**

This question is the only question to be structured differently than was the case in 2021, where it was more generically worded (Below average, Average, Slightly above average and Well above average). In 2021, there was a greater representation of higher income groups (self-evaluated) than on this occasion, where the distribution for all language versions is more similar to a normal distribution curve. This possibly reflects the fact that this time we have a 90% larger sample, which thus makes it more statistically representative.

DE respondents are clearly those with the least willingness to disclose information concerning income.



# Q7: Holidays abroad



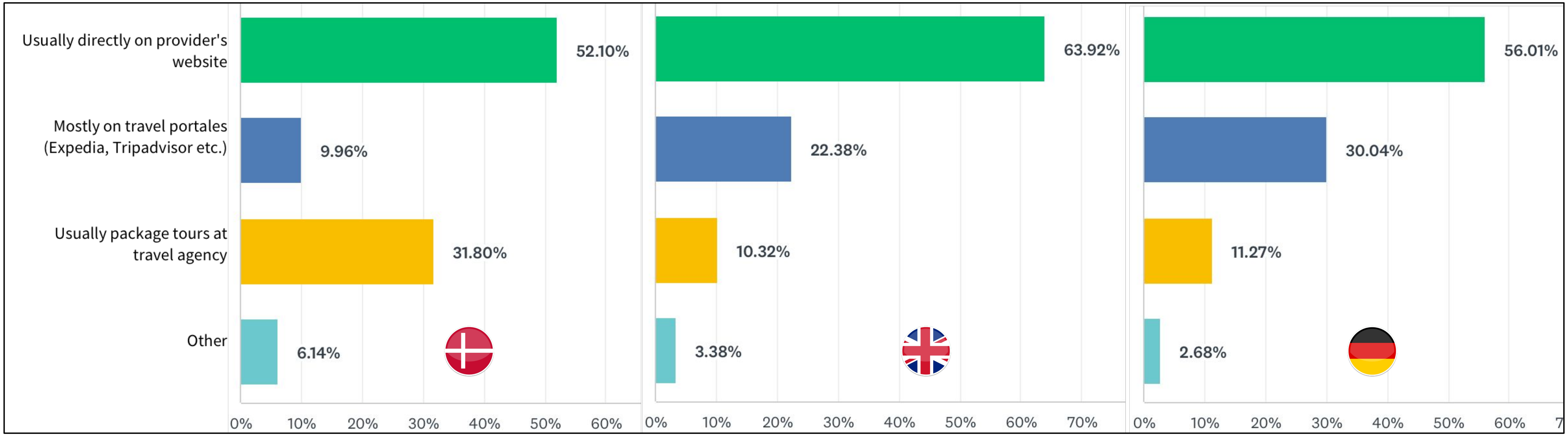

**Overall remarks**

- **DA**: The fact that 46.6% go on holiday abroad between 2 and 4 times a year may sound a lot, although at the same time 19.4% only take one foreign holiday a year. And 'only' 4.9% have more than 4 annual holidays abroad.
- **EN**: An almost identical pattern to the DA respondents – although around twice as many in percentage terms travel more than 4 times a year.
- **DE**: Very similar to EN respondents, although with the smallest percentage in relation to DA and EN that travel less than once a year.

**In perspective**

DA has clearly the highest percentage of respondents that travel less than once a year, whilst at the same time the smallest percentage that travel more than 4 times a year, which is perhaps due to there being an over-representation of the oldest age groups. For EN and, in particular, DE, there is a slightly smaller tendency to travel less than once a year on average. The latter possibly reflects the fact that there is an over-representation of the 18-24 age group.

# Q8: Booking habits in connection with holidays




**Overall remarks**

- **DA**: Around half of DA respondents book every aspect of the trip online directly with the provider themselves, whilst around 1/3 buy package holidays through a travel agency.
- **EN**: Significantly more EN respondents (63.9%) than DA (52.1%) purchase every aspect of the trip online directly from the provider themselves, whilst considerably fewer (10.3%) purchase package holidays through a travel agency than DA (31.8%)
- **DE**: Just over half of the respondents purchase online from the provider themselves, whilst only 11.3% buy package holidays. No less than 30% purchase aspects of their trip through third-party travel portals (Expedia, Kayak, etc.)

**In perspective**

These results are very similar to those from the survey in 2021, which is perhaps due to there being many returning respondents. DA respondents have clearly the greatest tendency to buy package holidays, which may be due to the fact that the oldest age groups are over-represented. EN respondents are those with the greatest tendency to book everything on the provider's website themselves, whilst DE are those with clearly the greatest tendency to book through travel portals such as Expedia, Tripadvisor, Kayak, etc.

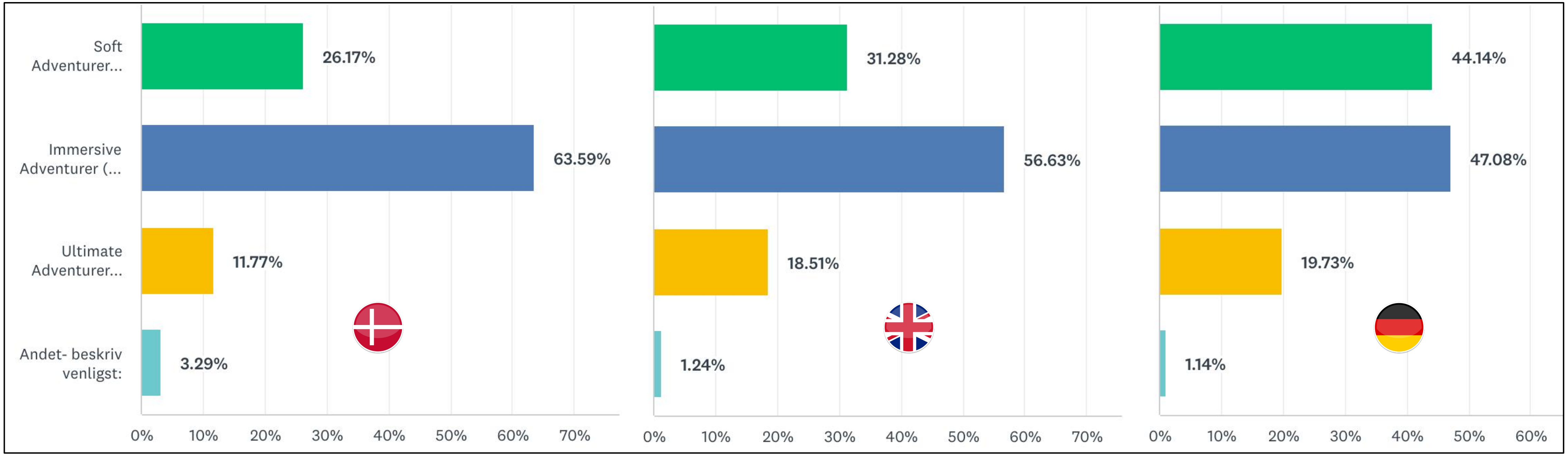
# Q9: First thoughts that come to mind




When we ask respondents about the first thoughts that come to mind about Greenland, not surprisingly it is words such as ‘beautiful nature', ‘ice', ‘icebergs', 'landscapes', 'Inuit', ‘cold', ‘northern lights', ‘snow', ‘people', ‘experiences', 'adventure', ‘fresh air', 'wildlife', 'remote', 'amazing', ‘culture’, ‘quiet’ and similar.

The associations are overwhelmingly positive, borne by a fascination of nature and culture, and the exotic impression most people have of Greenland.

# Q10: Identification with VG's 3 main segments



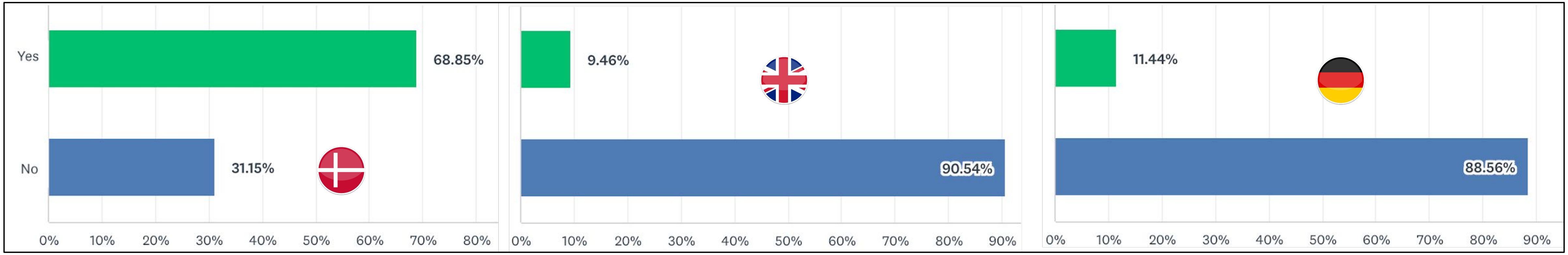

**Overall remarks**

- **DA**: The distribution between the 3 segments tallies very well with the distribution in the 2012-2015 + 2017 interviews, with Immersive Adventurers having a share of around 2/3.
- **EN**: What stands out here is that the percentage of Ultimate Adventurers is almost twice as high as for DA respondents.
- **DE**: Clearly the largest proportion of Soft Adventurers of the three language segment samples, but at the same time the largest proportion of Ultimate Adventurers.

**In perspective**

The physical interviews VG conducted with tourists in Greenland during the period 2012-2017 revealed that the distribution between the 3 segments was approx. 19% Soft Adventurers, approx. 64% Immersive Adventurers and approx. 17% Ultimate Adventurers. This overall distribution is still more or less valid, but it can be seen that there are differences between the DA, EN and DE language segments.

# Q11: Whether respondents have visited Greenland before



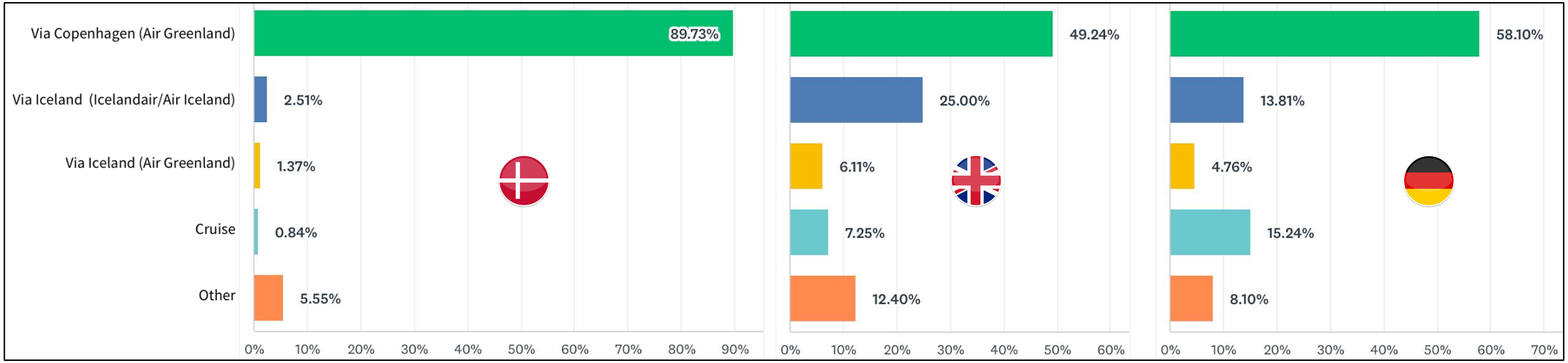

**Overall remarks**

- **DA**: A surprisingly high percentage of 68.9% of DA respondents have been in Greenland before, which again reflects the fact that the majority of DA respondents were recruited via GT and VG's newsletters and can be regarded as 'Greenland fans'.
- **EN**: The fact that almost 10% of the respondents have previously visited Greenland is probably simply due to the fact that they have previously been customers of Greenland Travel and have been recruited through GT's newsletter, as we know that once we move outside Denmark's borders, there are generally only a very limited number of tourists that have visited Greenland.
- **DE**: The same must be assumed to apply to DE respondents.

**In perspective**

One of the primary goals of conducting this survey has been to get fresh data on previous Greenland tourists' travel and booking behaviour in relation to Greenland as a destination. We wish to get as valid an estimate as possible of tourists' consumption while travelling in Greenland, how many destinations they visited, how long they stayed in Greenland, etc. We have chosen to not actively exclude respondents who answered the survey in 2021, since we have been unable to save their email addresses (due to considerations of personal data protection), so it is difficult to rule out that there are many respondents who also took part in the 2021 survey. We could also have recruited exclusively via Facebook ads and thus would have spent lots of money on this form of recruitment, although it is unlikely we would have obtained as large a percentage of previous Greenland tourists via this recruitment method.

# Q12: How respondents travelled to Greenland



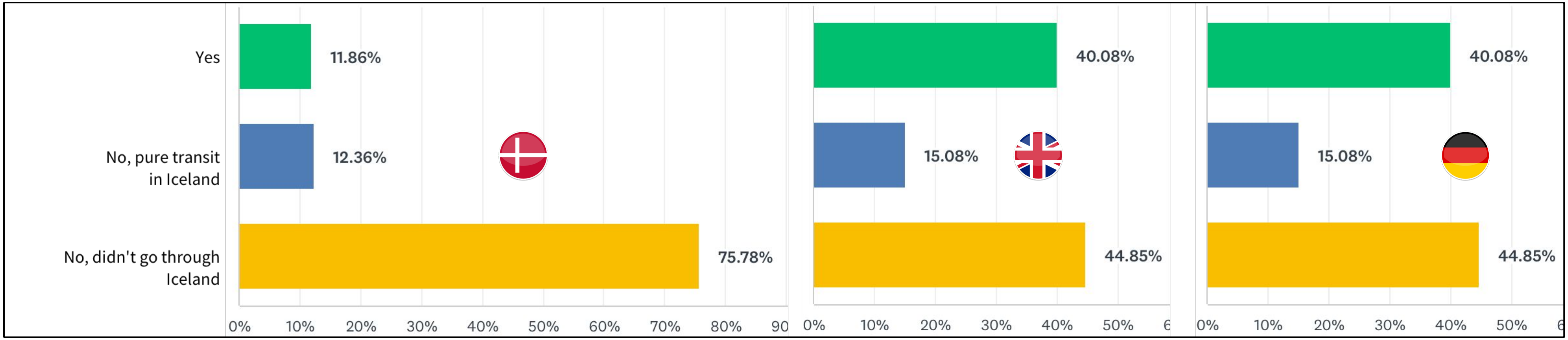

**Overall remarks**

- **DA**: We know from airline passenger data (Mittarfeqarfiit, Air Greenland and Icelandair) that approx. 1/3 of foreign air travellers arrive in Greenland via Iceland – in 'normal' years that are not affected by Covid-19 – whilst the remainder travel via Copenhagen. It is not surprising that almost 90% of DA respondents arrived via Copenhagen with Air Greenland.
- **EN**: Around half of the previous Greenland tourists in the EN sample flew via Copenhagen with Air Greenland. 23.4% of the EN respondents live in the USA and Canada. Of these, around ¼ of them flew via Copenhagen with Air Greenland, which is a surprisingly large proportion, as logistically it is easier to fly from North America via Iceland. Of the British citizens that flew to Greenland, 54.7% travelled via Copenhagen, 37.7% via Iceland with Icelandair and 7.6% via Keflavik with Air Greenland.
- **DE**: For German citizens who flew to Greenland., 78.9% travelled via Copenhagen with Air Greenland, 16.4% via Iceland with Icelandair and 4.7% via Iceland with Air Greenland.

**In perspective**

There is a clear tendency for Danish citizens to travel directly to Greenland via Copenhagen – and from 29 March also directly from Billund on Air Greenland's new summer route. A little more than half of British citizens (who flew to Greenland) travelled via Copenhagen, which is promising with regard to Air Greenland's forthcoming direct routes to Ilulissat and Nuuk. For Germany, which is Greenland's second biggest market, almost 80% of those who flew to Greenland also travelled via Copenhagen, which is also a positive indicator for Air Greenland. For both GB and DE citizens, however, a proviso must be made for the fact that many are recruited via Greenland Travel's newsletter.

# Q13: Holiday time spent in Iceland on the trip to Greenland



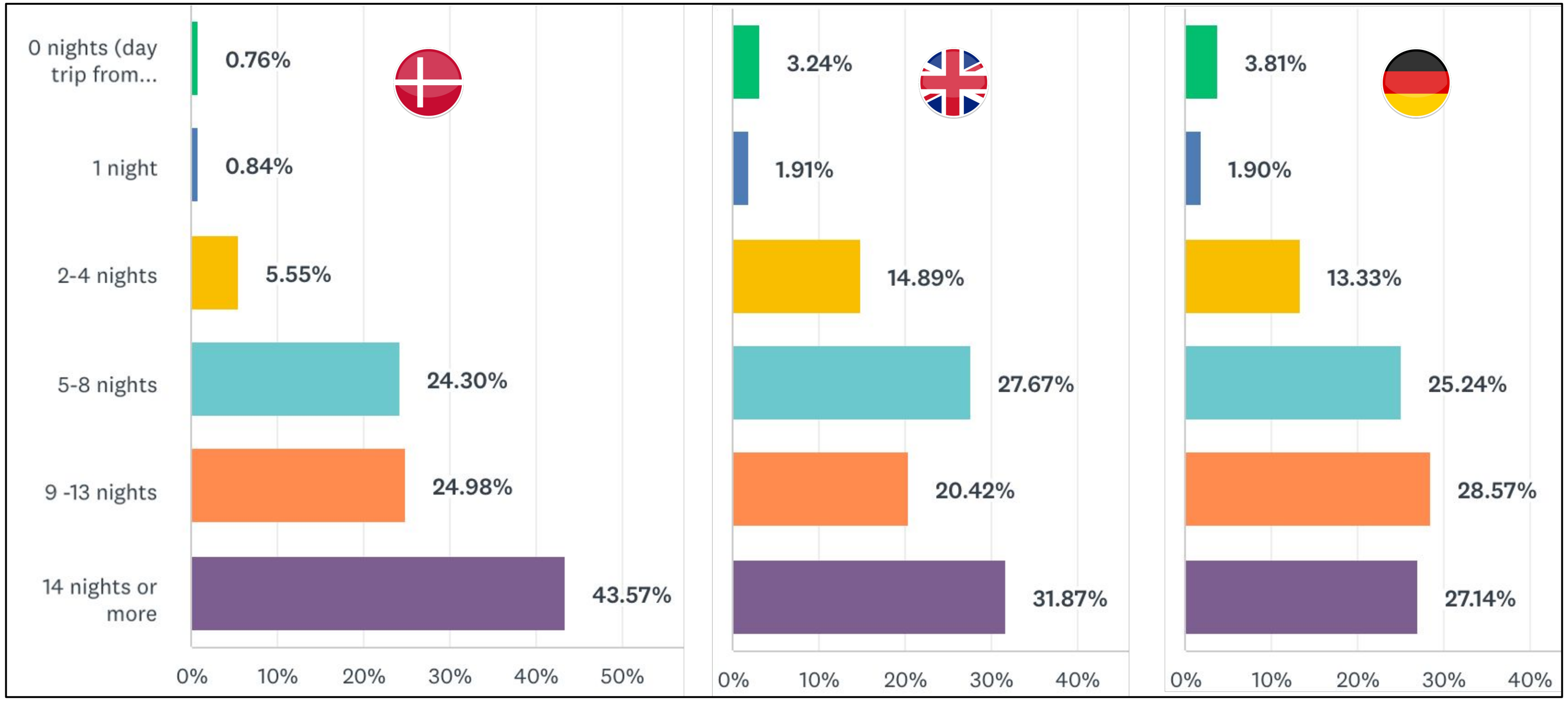

**Overall remarks**

- **DA**: For previous Greenland tourists with residence in Denmark, 10.5% of them spent some days of their holiday in Iceland in connection with their trip to Greenland. Danish citizens make up 93% of the DA sample.
- **EN**: For previous Greenland tourists resident in Great Britain, 40.5% of them spent some days of their holiday in Iceland. The corresponding figure for American citizens is 56.2%, whilst the figure for Canadian citizens is 50.0%.
- **DE**: For German citizens, the figure was 27.2%, whilst for Swiss and Austrian citizens the figures were 37.0% and 11.8% respectively.

**In perspective**

For Danish tourists in Greenland, it is clearly most popular to fly directly to Greenland, and thereby combining a tour to Greenland with a few days of holiday in Iceland is not the obvious choice, but if we look at just about every other market, there is pretty good potential for marketing and selling Iceland/Greenland combination holidays.

# Q14: Number of nights spent in Greenland



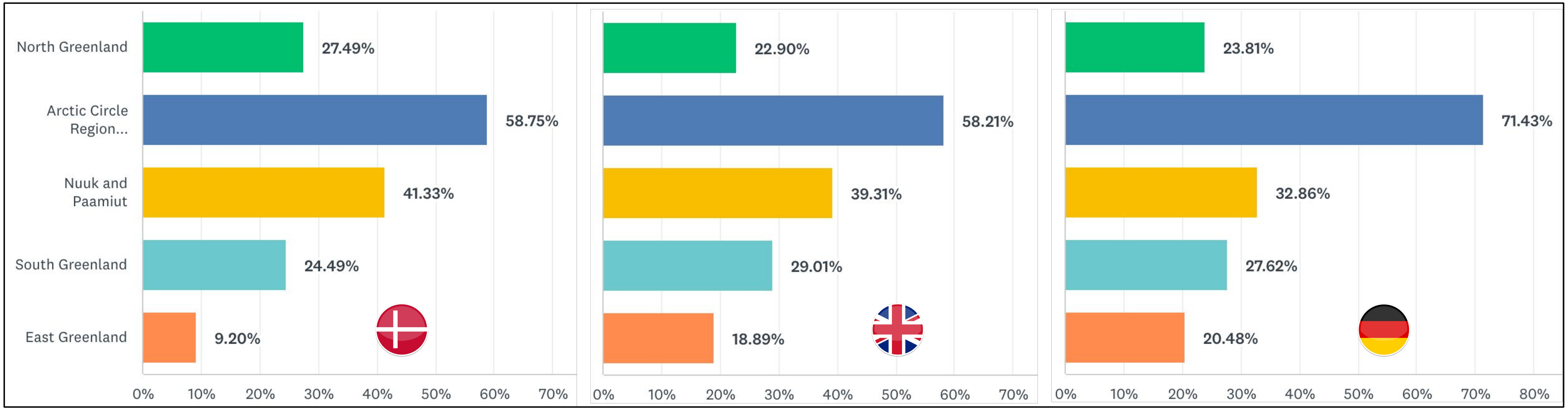

**Overall remarks**

- **DA**: Almost half of DA previous Greenland tourists spent 2 weeks or more in Greenland, which is highly desirable, as the longer each tourist stays at the destination, the higher the earnings per tourist. However, it must be taken into account that in the DA sample there is a strong over-representation of older age groups.
- **EN**: The '2-4 nights' group is considerably larger than for the DA sample. However, the '14 nights or longer' group is still the largest.
- **DE**: The '9-13 nights' group is the largest, but only slightly larger than '14 nights or longer' and '5-8 nights'.

**In perspective**

In relation to the DA sample, it must be taken into account that older age groups are over-represented. This does not apply to the EN and DE samples, and here the '14 nights or longer' still makes up a significant proportion, which is particularly positive, as a tourist is worth more the longer they stay in the country.

# Q15: Regions in which at least one night is spent



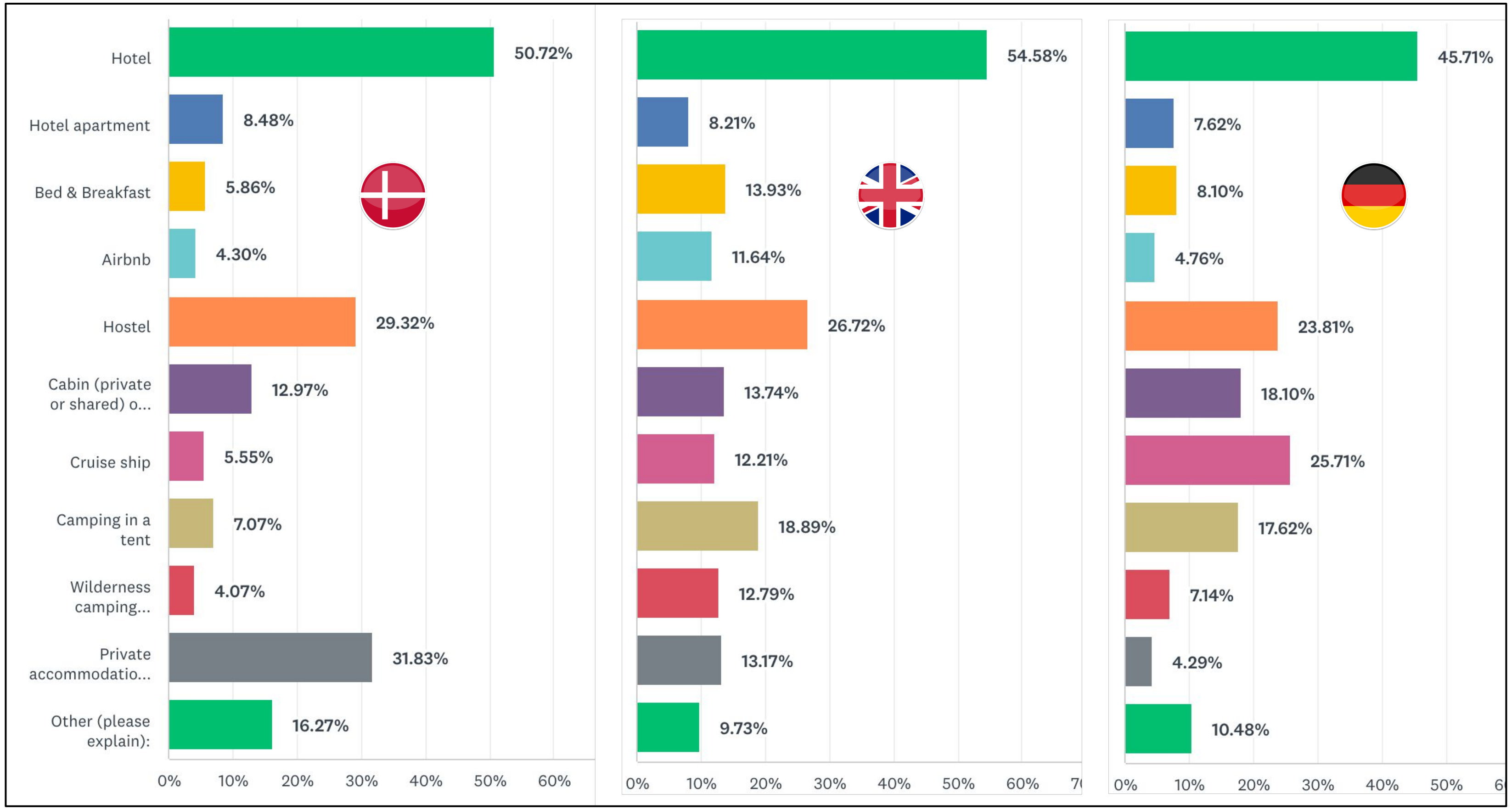

**Overall remarks**

- **DA**: It is surprising that almost twice as many spent one night in the Arctic Circle Region compared to North Greenland, as during normal years (without Covid-19) North Greenland usually has around twice as many Danish guests as the Arctic Circle Region.
- **EN**: Broadly the same pattern as DA, although with 9 percent more who visited East Greenland.
- **DE**: Broadly the same pattern as EN, but considerably more who visited the Arctic Circle Region. NB: the respondents could choose ‘at least one region’, i.e. either 1, 2, 3, 4 or all regions.

**In perspective**

As mentioned above, it is surprising for DA, EN and DE that the Arctic Circle Region is the most visited region – and by quite a large margin. It is possible that many of the respondents have misunderstood the question, and may have thought that it just meant that they had crossed into the Arctic Circle Region – which more than 2/3 statistically have done as they have either arrived at or departed from Kangerlussuaq airport. According to overnight accommodation data from Statistics Greenland, the Arctic Circle Region is the second most popular destination in terms of the number of foreign guests (2019), and the third most popular destination in terms of the number of nights spent by foreign guests. Previous detailed studies of the Arctic Circle Region (data not available at stat.gl) have shown that the region is actually also the second most popular in terms of the number of tourists staying overnight when accommodation venues that do not submit data to Statistics Greenland are included.

# Q16: Types of overnight accommodation



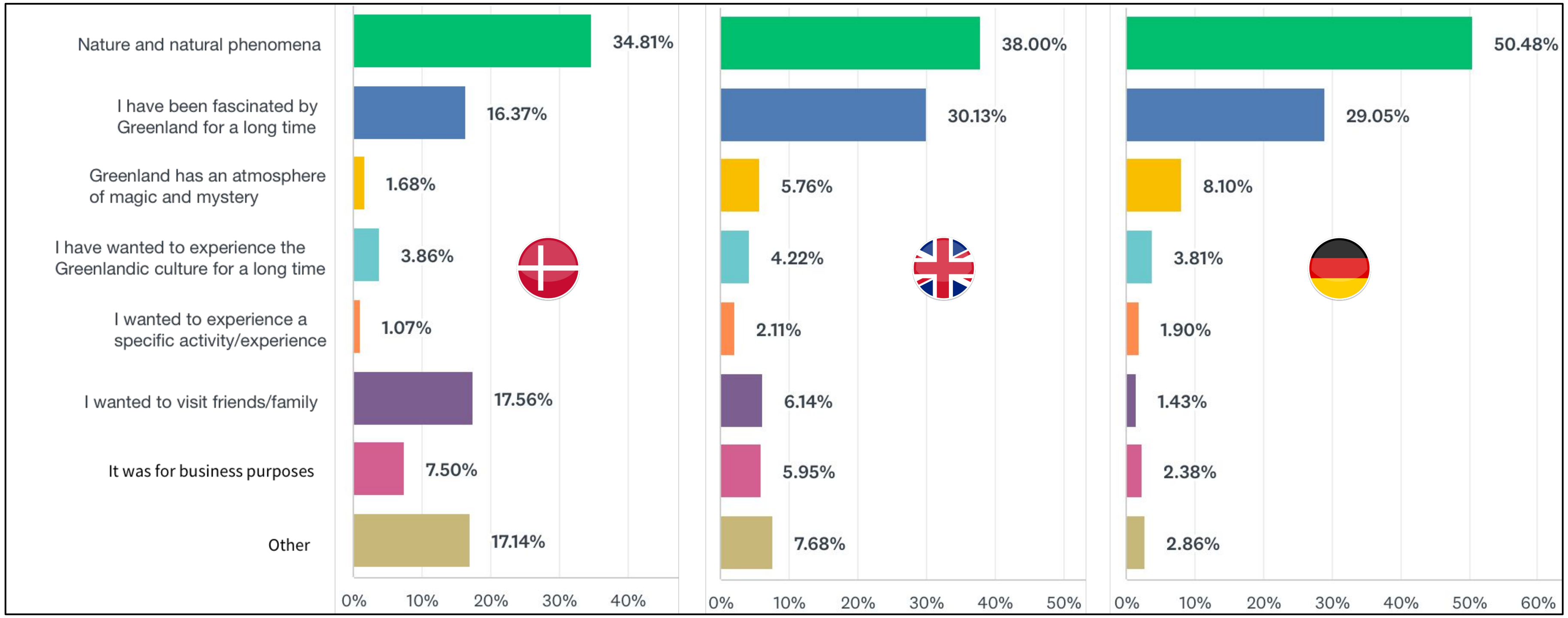

**Overall remarks**

- **DA**: Half have stayed at a hotel. Not surprisingly, no less than 31.8% have stayed with family/friends. DA respondents are also those for whom the group that has stayed overnight at a hostel is greater than for EN and DE.
- **EN**: What stands out is the large group (18.9%) that have stayed overnight in a tent, which tells us that the sample probably has an over-representation of campers and tourists that have visited Greenland in the summer high season.
- **DE**: The sample is similar to EN, apart from that it is clearly the sample that has the highest proportion that have stayed overnight on a cruise ship.

**In perspective**

In overall terms, hotels are the most popular form of overnight accommodation, followed by hostels. For the DE sample, however, the second most popular is cruise ships. For DA respondents it is not surprising that so many have stayed overnight with family/friends. This does not mean, however, that they have only stayed in private accommodation, but that they have 'also' stayed overnight with friends/acquaintances. A surprisingly large number of EN and DE respondents have stayed overnight in a tent (approx. 18%), which perhaps reflects an over-representation of nature-focused segments (Immersive and Ultimate Adventurers) and that the majority have probably visited Greenland in the summer high season.

# Q17: Main reason for visiting Greenland




**Overall remarks**

- **DA**: NB: It was only possible to choose one primary reason. ‘Nature and natural phenomena’ is not surprisingly the primary reason for all language segments. On the previous page, 31.8% replied that they stayed with family/friends, and in this case we see that ‘Wanted to visit friends/family’ was the primary motivation for 17.6% of them. 16.4% have ‘been fascinated by Greenland for a long time’, which says something about the fact that they have dreamt about the trip for a long time before finally taking the plunge – this may also be because it has been ‘necessary to save up’ in order to realise this dream.
- **EN**: Also here no less than 30.1% have ‘been fascinated by Greenland for a long time’, which again tells us that Greenland can be regarded as being a 'bucket list’ or 'once in a lifetime' destination.
- **DE**: This language segment has even greater focus on nature experiences than DA and EN. Greenland has also been a dream destination for a long time before making the trip.

**In perspective**

The fact that Greenland is a ‘dream destination’ which you do not just head off to on the spur of the moment is not a major surprise – probably because it is an expensive destination which often requires extra savings and research before actually embarking on the trip.

# Q18: Most popular tourist products

**In perspective**

Fortunately, the graph is pretty self-explanatory. The Top 5 are as follows across the 3 language samples:

1. Museum visit
2. Guided tour to the Ice Sheet
3. Sailing tour
4. Visited a settlement
5. City sightseeing (with guide)

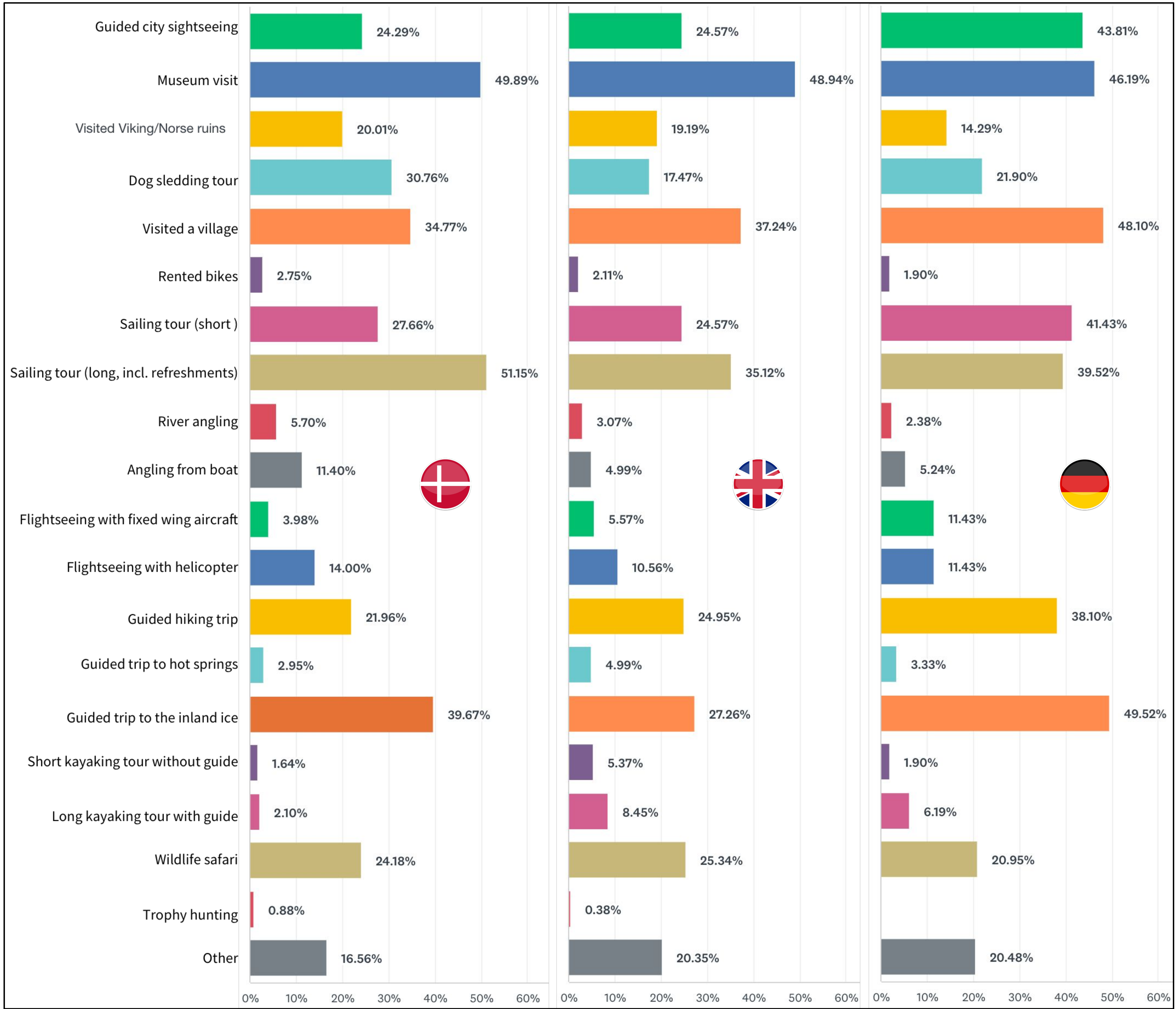
Several of the most popular products are at the cheaper end of the range of products on offer in Greenland, which means that they are 'lower hanging fruit' than the more expensive products.

The Top 5 is a good mix of nature-based and culture-based products/experiences.

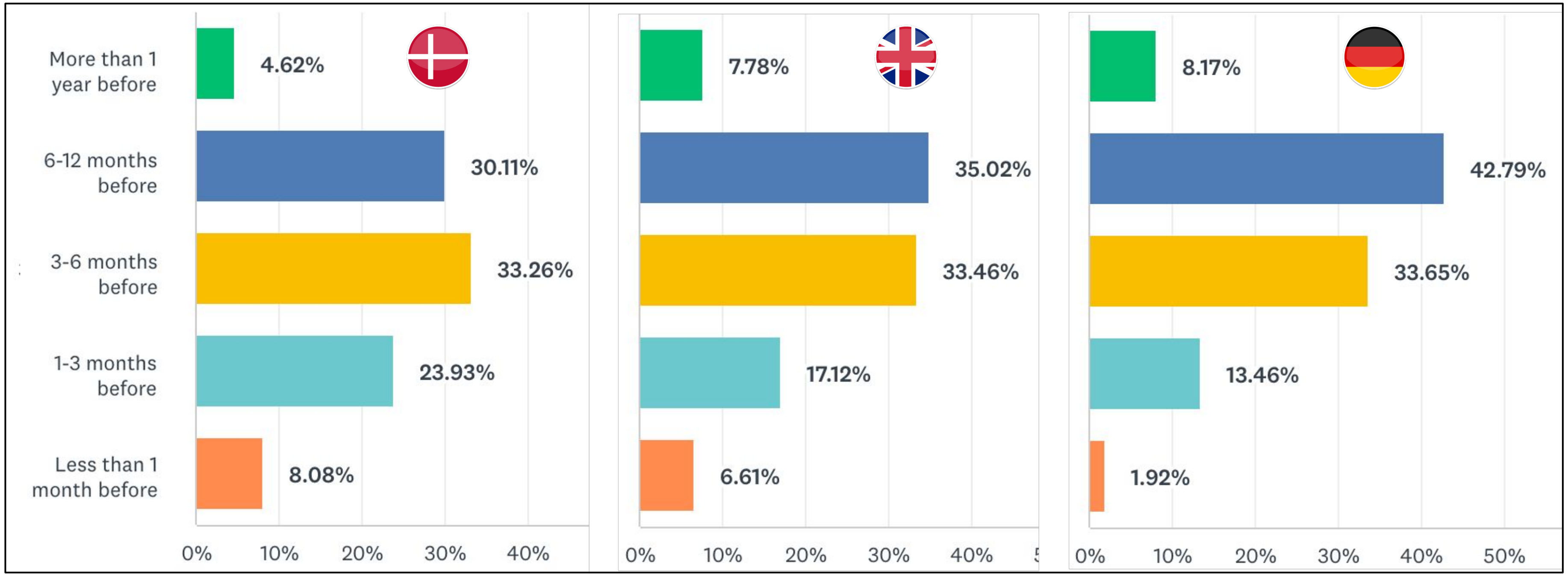
'Guided hikes' appear to have particularly good potential for the DE segment.

Although flightseeing by helicopter and fixed-wing aircraft are rather expensive products, they are still relatively popular.

Niche products such as 'Longer kayak trip with guide' have the best potential for the EN and DE segments.



# Q19: How long prior to the trip transport and accommodation were booked



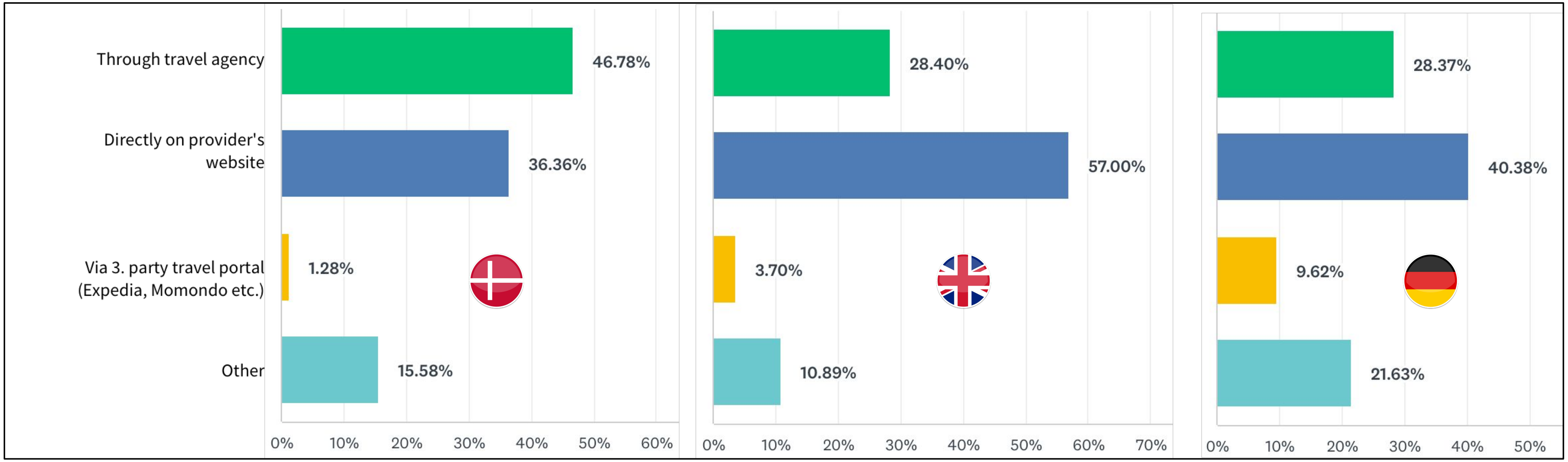

**Overall remarks**

- **DA**: The booking pattern tallies with the previously collected data, whereby the majority have booked several months in advance. This may be due to the fact that Greenland's most popular destination, Ilulissat, is often sold out more than six months ahead in the summer high season.
- **EN**: The pattern is very similar to the DA pattern, although there are more in the group that have booked more than one year in advance.
- **DE**: Close to half have booked 6-12 months prior to the trip. This language segment is the most 'conservative' and has generally booked a longer time in advance than the two other language segments.

**In perspective**

When you take into account the results from Q17 concerning the primary reason for choosing a trip to Greenland, in which Greenland is a destination people have 'dreamt about for a long time', it is no surprise that it is not a trip you book on the spur of the moment. Greenland is unique as a destination, in that as a tourist it takes time to learn how to get around in the country, what you can experience in different places, how the climate and weather can affect your trip, etc. It is one of the most expensive destinations in the world and it is therefore natural that it is a trip you spend a long time saving up for and doing research on – and do not just book on the spur of the moment shortly before departure.

# Q20: How the trip was booked



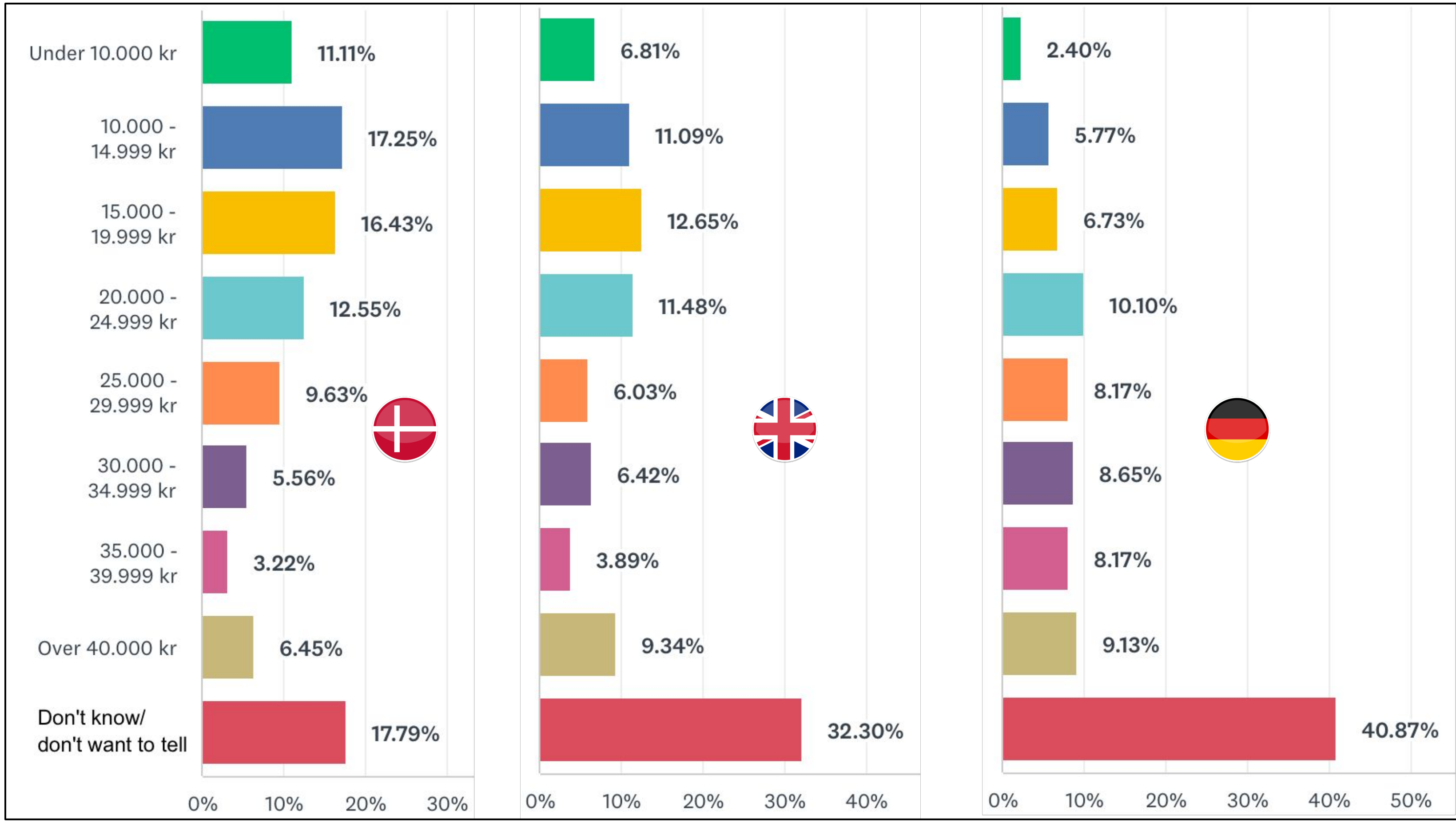

**Overall remarks**

- **DA**: Perhaps due to the over-representation of older age groups the DA segment is considerably more inclined to book through a travel agency – this would tally with data from other sources which indicate that older segments are more likely to exhibit this booking behaviour. There were almost no DA respondents who booked through third-party travel portals such as Expedia, Kayak, etc.
- **EN**: This language segment has the highest likelihood of the three to book directly online with the provider.
- **DE**: This language segment has clearly the greatest tendency to book through third-party portals such as Expedia, Kayak, Tripadvisor, etc.

**In perspective**

If you are a tourist operator in Greenland, it is worth noting which channels are most likely to 'catch' the different language segments. The smallest Greenlandic operators partner up with travel agents such as Greenland Travel, Topas, Albatros, Profil Rejser, etc., such that they act as sub-suppliers to these firms, which enables them to avoid having to set products up in sales channels and market them, which certainly takes time, money, experience and relevant digital skills. Many of these operators do not work full time in the tourism industry and often do not have the time and resources to take an education in marketing and sales in the modern and ever-changing digital world, so it makes good sense to enter into partnerships. For medium-sized operators, it may provide a competitive advantage to be good at sales and marketing via new online possibilities such as Facebook ads, Tripadvisor, Google AdWords and various booking platforms that charge a certain percentage in commission on each sale.

# Q21: How much money was spent per person on the whole trip




**Overall remarks** (NB: We have asked how much the respondents have spent in DKK, which may have been difficult for EN and DE to estimate accurately)

- **DA**: If you have managed to spend less than DKK 10,000 in total on a trip to Greenland, then it must either have been a long time ago, or be because you have only stayed with friends/family, as it is otherwise almost impossible to stay within this budget.
- **EN**: Similarly, the group that have spent less than DKK 10,000 have either visited family/friends or stayed overnight in the great outdoors. The pattern is similar to DA respondents, although a slightly larger proportion have spent more than DKK 40,000. There are almost twice as many who have not wanted to disclose their budget, which may be due to reasons of privacy, but perhaps also because they have been asked about their consumption in DKK.
- **DE**: There is a higher proportion in the groups that have spent between DKK 25,000 and DKK 40,000 than DA and EN. This is quite clearly the language segment that is most likely to not want to disclose information about their consumption.

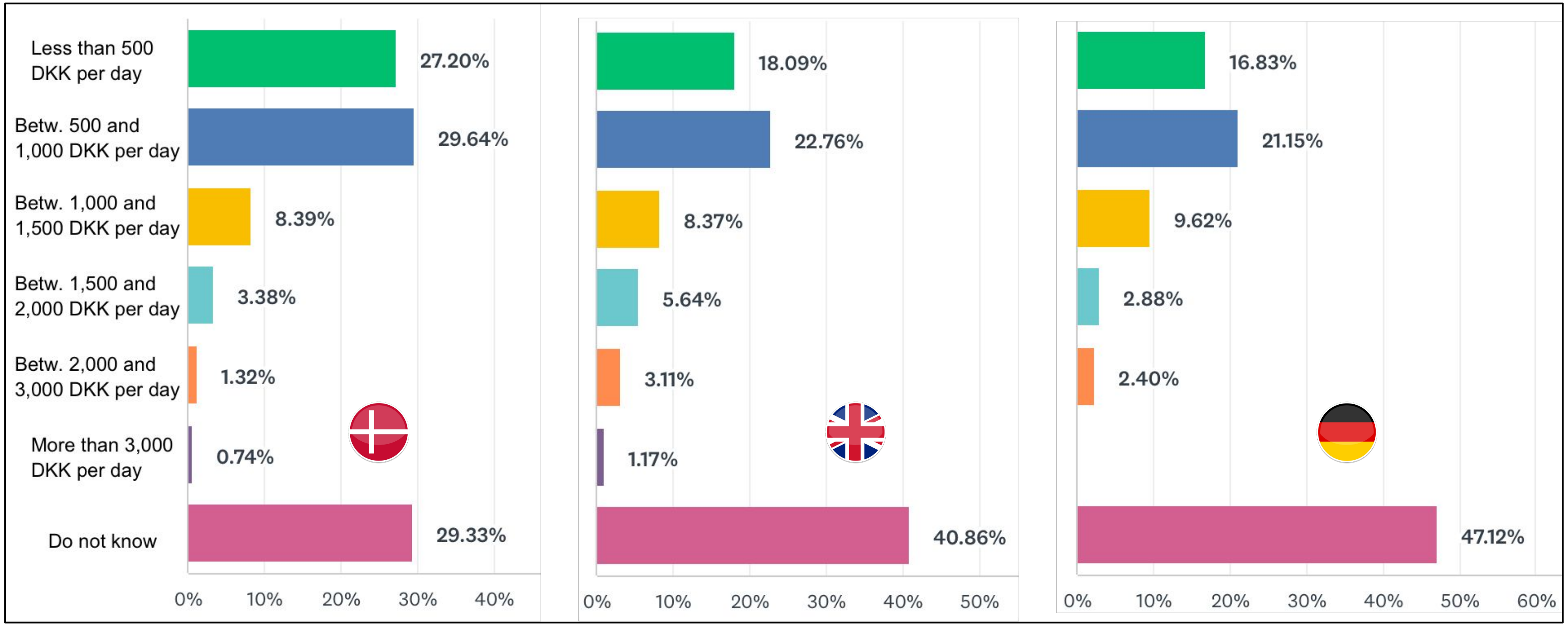
**In perspective**

The DA and EN segments appear to be similar, with an average total consumption in terms of the entire trip of around DKK 20,000 +/- a few thousand DKK.

The German-language segment appears to have had higher consumption, but it is difficult to say, as no less than 40.9% of this segment have not wished to disclose this information.

Looking at the overall pattern, however, it is clear that there are many types of tourist segments in terms of consumption during a trip to Greenland – relatively evenly distributed amongst the different consumption intervals.

# Q22: How much money was spent per person per day (excl. transport and accommodation)



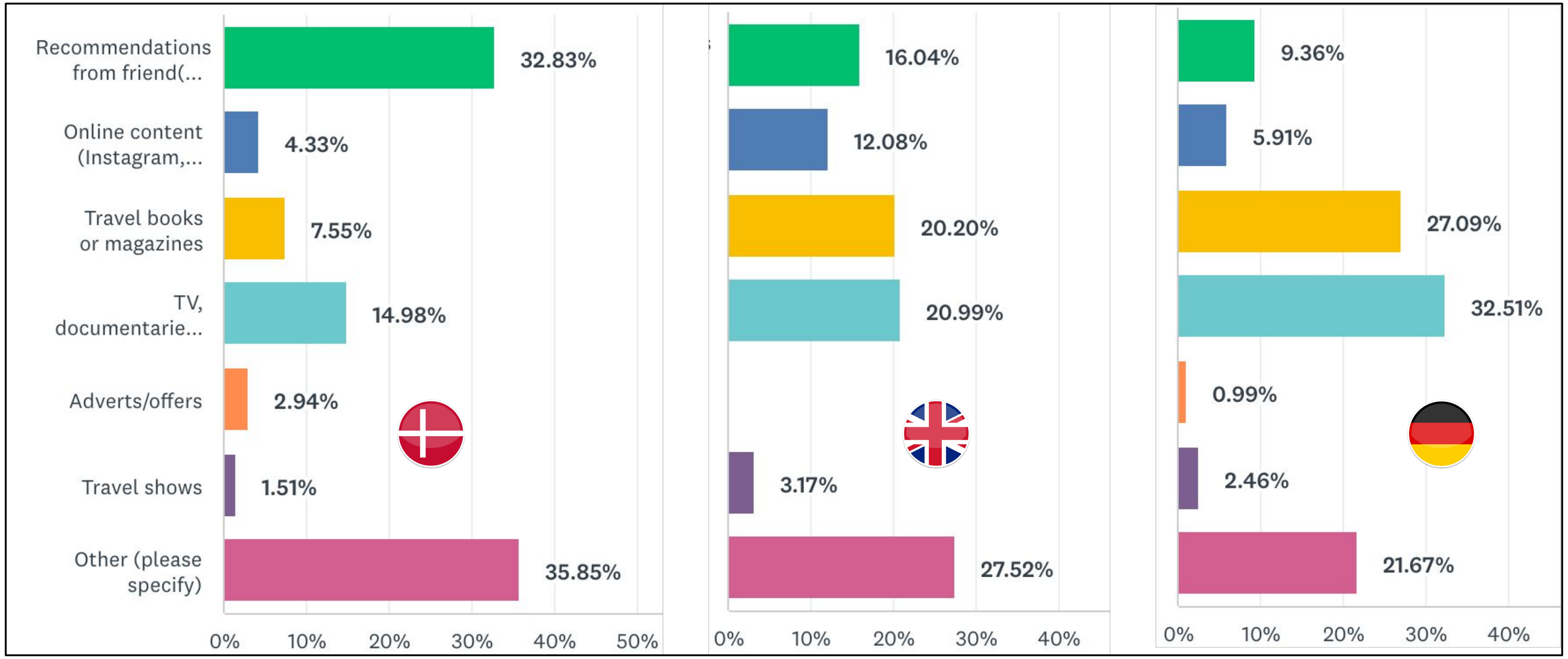

**Overall remarks**

- **DA**: DA respondents are quite clearly those that spend the least amount of money per day compared to EN and DE. This confirms data from other sources that Danes are relatively price-sensitive. Furthermore, we know from Q16 that 31.8% of DA respondents have stayed with friends/family, which enables them to save a lot of money.
- **EN**: The mutual distribution between the groups is similar to DA, but overall the EN respondents spent a little more money per day.
- **DE**: The pattern in this survey has changed compared to the results from the survey in 2021, when DE respondents were those that had the highest consumption per day. In this survey, DE respondents appear to have a smaller consumption than EN respondents, although at the same time data is not available from no less than 47.1% of them because they did not want to answer the question.

**In perspective**

For all 3 language samples/segments there is a large percentage that did not wish to answer the question, which makes the results statistically less valid. Perhaps people are less willing to provide information on consumption if they belong to groups with the highest consumption, which is a possibility that cannot be ignored.

# Q23: What most inspired respondents to visit Greenland



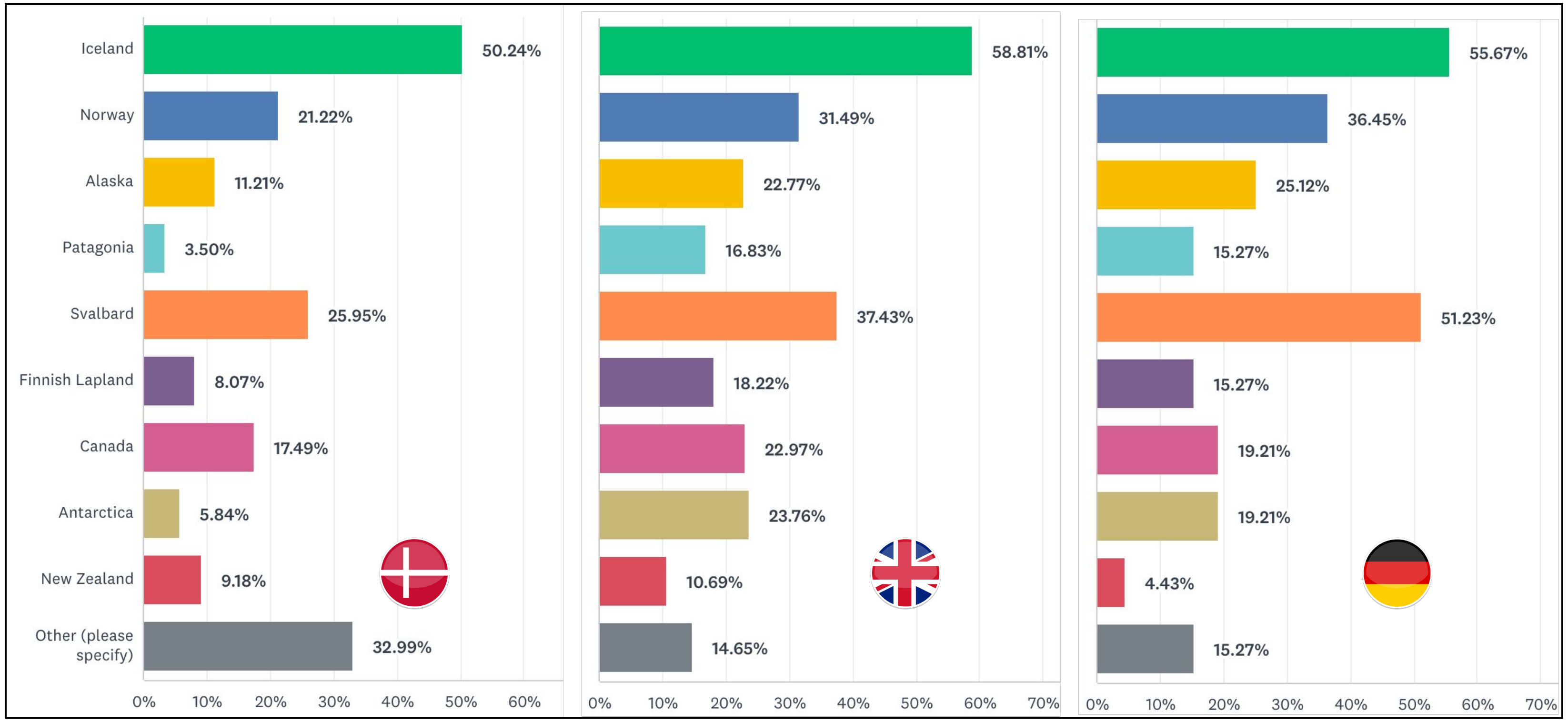

**Overall remarks**

- **DA**: Not surprisingly, recommendations from friends or family are quite clearly the biggest source of inspiration. Under 'Other', we typically find other types of direct or indirect connections to Greenland via family members, friends, acquaintances, work or associations.
- **EN**: For this language segment, online content has considerably more importance than for DA, which may well be due to the over-representation of older age groups in the DA segment. It is surprising that nobody identified advertisements/special offers as inspiration.
- **DE**: Travel books and TV documentaries are clearly the channels that have the most impact in the DE segment. Under 'Other', there are lots of different sources such as YouTube, books, stories, work, overflights when crossing the Atlantic, etc.

**In perspective**

This question reveals the biggest differences in the results between DA and the other two language segments. For DA, 'word of mouth' means a great deal. For EN and DE, on the other hand, travel books and TV play a major role – in particular for DE.

# Q24: Other destinations that were also considered



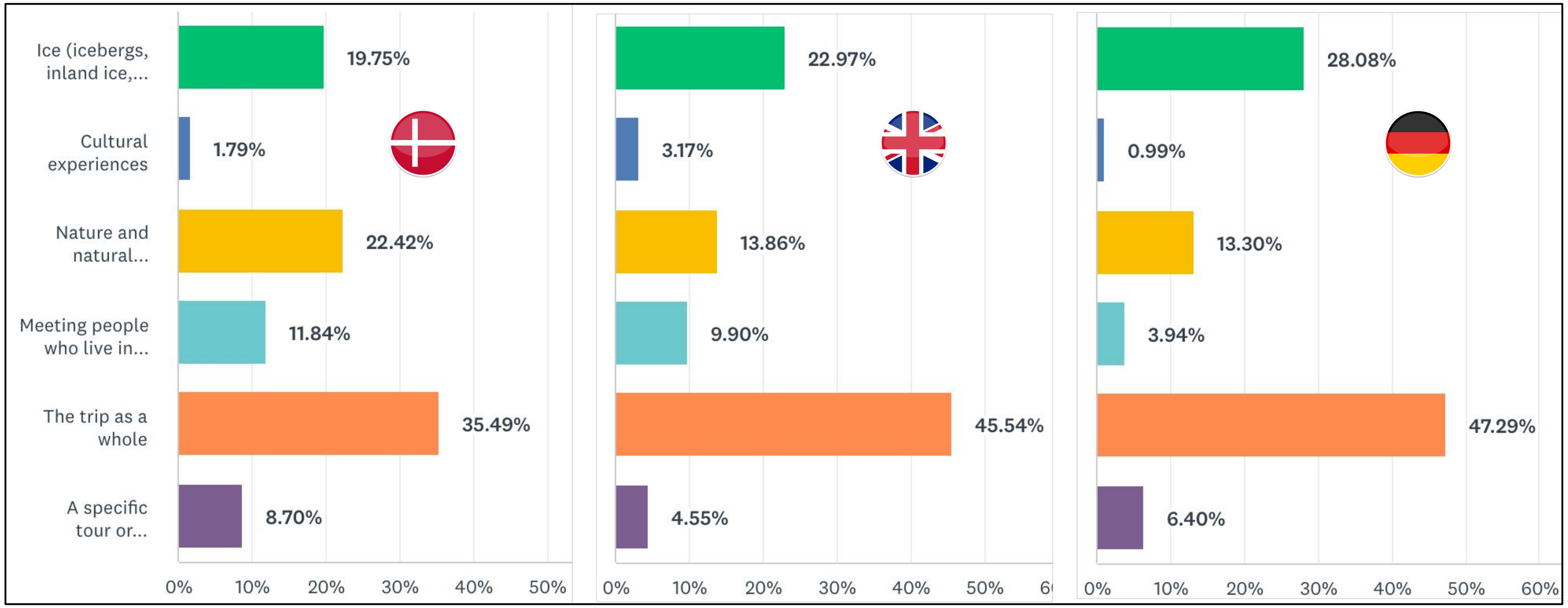

**Overall remarks**

- **DA**: Several choices could be made, and the sum of all the percentages thus exceeds 100%. For DA, the total in relation to specific destinations was 152.7%, which means that on average DA respondents chose 1.5 destinations, which is considerably less than EN and DE. Under 'Other', many respondents answered that they only considered Greenland.
- **EN**: 243.0% in total, which shows that EN respondents chose 2.4 destinations on average.
- **DE**: 241.9% in total, which is similar to EN respondents, with 2.4 destinations chosen per respondent on average.

**In perspective**

With Iceland as a clear favourite amongst all 3 language segments, this confirms data we have from a recent survey in Scandinavia, Germany, France, Greta Britain and North America conducted by the bureau NIT Kiel. In this survey, however, Svalbard is not as popular as in these results. However, whereas many of the respondents in this survey have visited Greenland, only a few in the NIT survey had visited Greenland.

# Q25: The best thing experienced by the respondents in Greenland



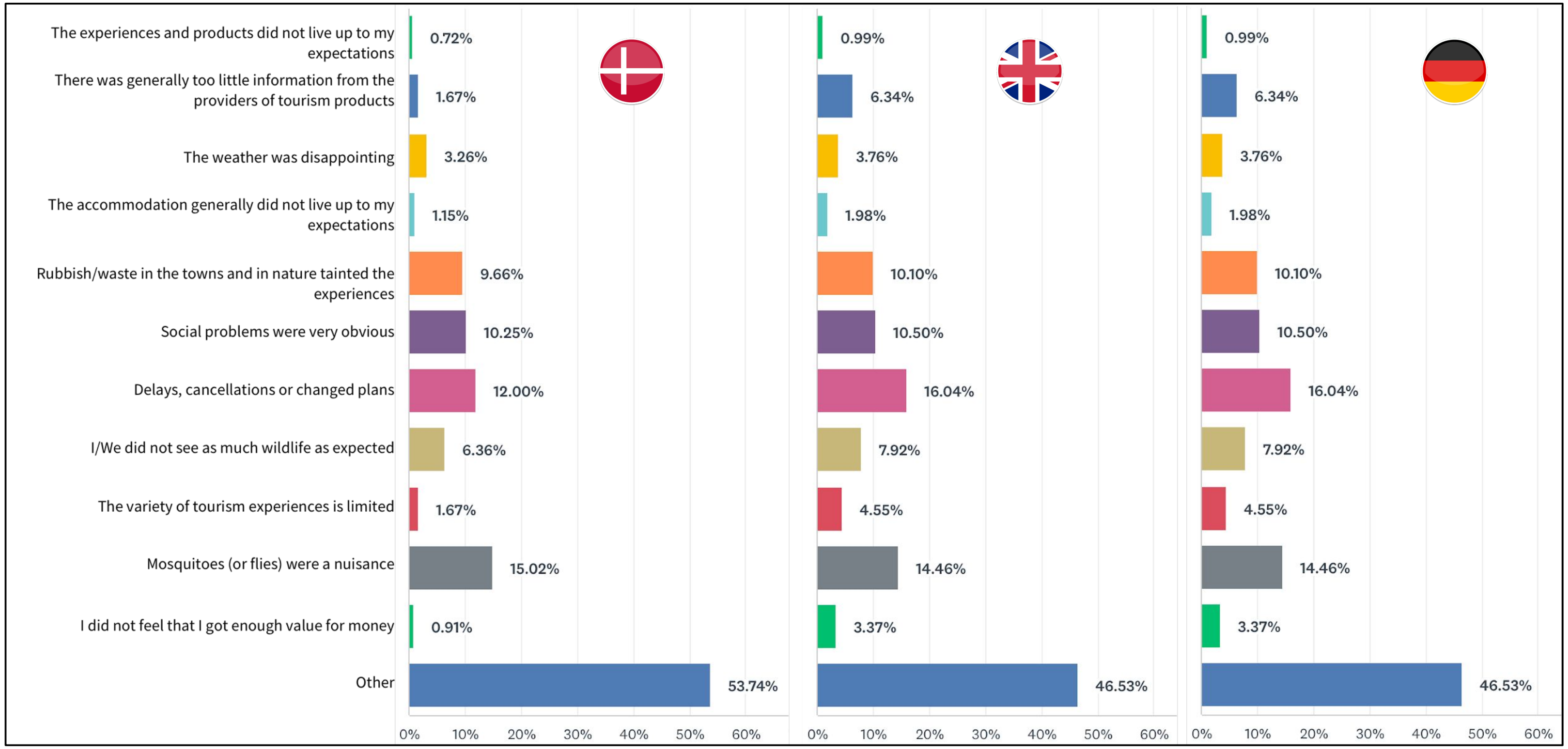

**Overall remarks**

- **DA**: It was good to see that so many have chosen 'the trip as a whole', which indicates that many aspects have an influence on satisfaction with regard to the trip. Otherwise, nature experiences dominate. 'Meeting people who live in Greenland' has also been a good experience.
- **EN**: Even more (than DA) have chosen 'the trip as a whole', after which 'ice' and nature have made the biggest impression. Meeting the local people has also left a positive impression here. EN respondents are those (compared to DA and DE) in which the highest proportion specify 'cultural experiences' – but even in this case the theme only represents a small percentage.
- **DE**: DE respondents are very satisfied with the trip as a whole, but of the individual themes, ice has made a big positive impression. It is surprising that so few specify cultural experiences and meeting the locals. In data collected previously, we also see that German tourists have more focus on nature and less on culture than other segments.

**In perspective**

It is very positive that 'the trip as a whole' is the primary reason for so many. Not surprisingly, different aspects of ice in the country have made a big impression, but it is a surprise that cultural experiences do not carry greater weight.

# Q26: Negative experiences in Greenland



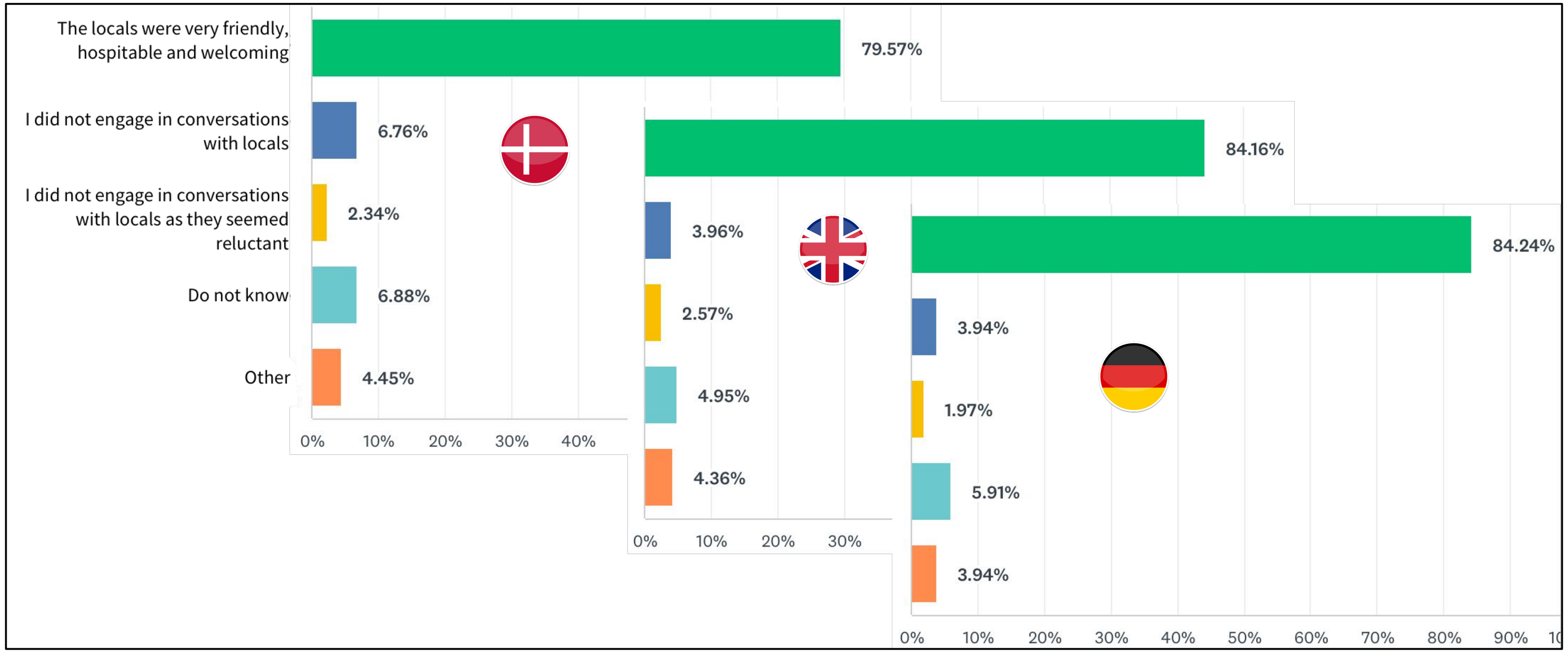

**Overall remarks**

- **DA**: NB: Under ‘Other’, the vast majority answer that there were no negative experiences. For the DA segment, mosquitoes (and flies) are clearly the most negative, followed by delays/cancellations, social problems and litter/waste.
- **EN**: Delays/cancellations occupy first place in terms of negative experiences, followed by mosquitoes/flies, social problems and litter/waste.
- **DE**: Also here, first place is held by delays/cancellations, followed by mosquitoes/flies, social problems and litter/waste.

**In perspective**

Fortunately, there are remedies for one of the biggest problems – mosquitoes. There are more and more effective approved mosquito agents, in addition to which you can buy mosquito nets with integrated glasses. It is hoped that the issue of delays/cancellations will be reduced when the new airports are put into service, as there will be a lower volume in feeder aircraft out to second tier airports. Litter/waste in urban areas and in nature is relatively easy to deal with, which unfortunately is not the case with social problems.

# Q27: How the hospitality of the local people is perceived



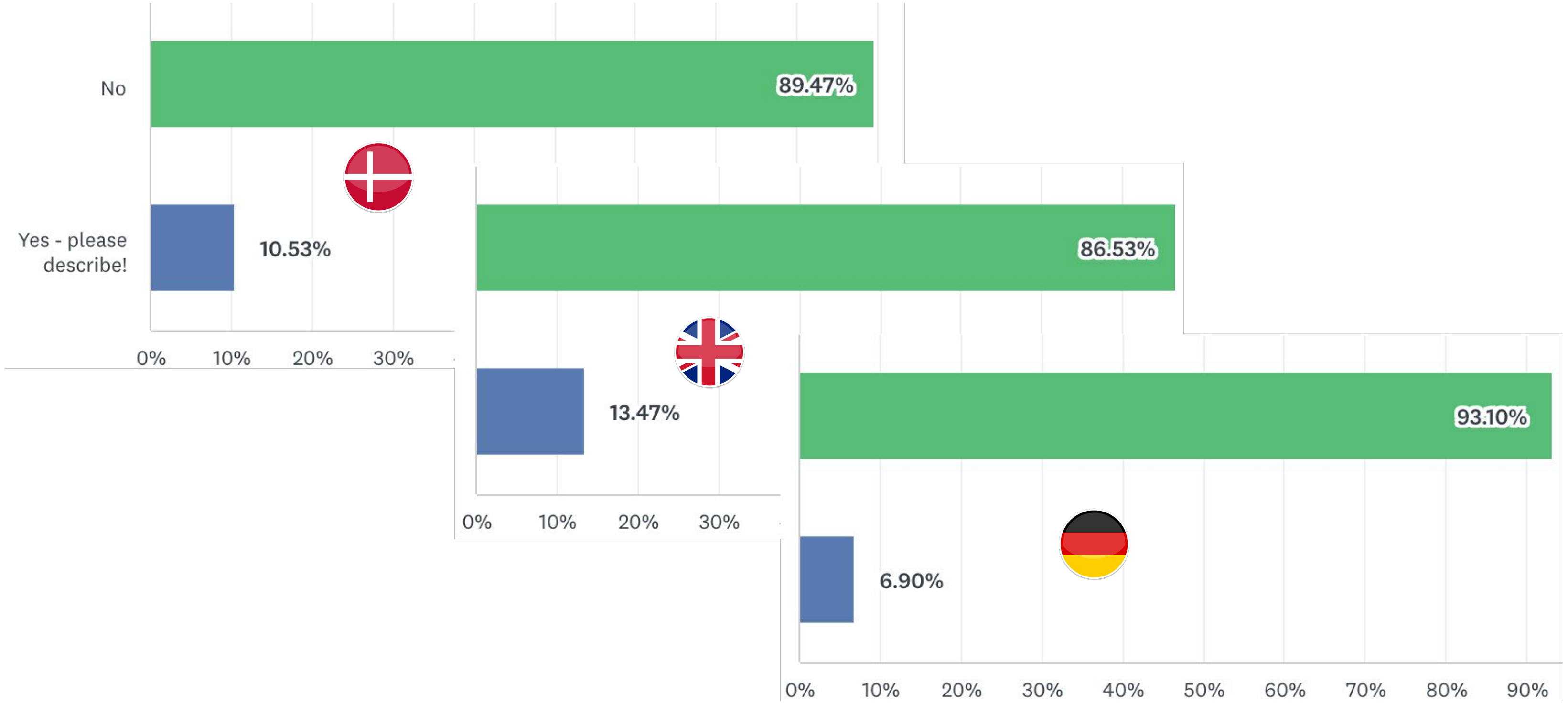

**Overall remarks**

- **DA**: Very positive that 80% think that the local people are very hospitable. Under 'Other', both positive and negative experiences are found. Some people point out that many Greenlanders can appear to be shy. A very small number of Danes have been met by unfriendliness/condemnation.
- **EN**: Even more positive experience of hospitality than DA. Under 'Other', some people think that Greenlanders can be reserved and shy – a few mention language barriers.
- **DE**: The results from this survey are more positive in relation to this question for the DE language segment. In the 2021 results, the DE language segment scored lowest of the three language segments in relation to the hospitality of the local population, but this time they score highest, albeit only a fraction higher than the EN segment.

**In perspective**

All in all, a very positive appraisal of the hospitality of Greenlandic citizens, which ties in with the results of a survey VG conducted in autumn 2022 concerning the attitudes of Greenland's citizens to tourists, where it was revealed that there is a very positive perception of, and attitude towards, tourism in Greenland. There can be slight language barriers every now and again, but not to any major extent.

# Q28: Whether language difficulties are experienced




**Overall remarks**

- **DA**: Nearly 90% did not experience language difficulties.
- **EN**: The EN language segment is the segment that has experienced the greatest degree of language difficulties (13.5%).
- **DE**: It is a little counter-intuitive that it is the DE language segment that has had the lowest degree of language difficulties in Greenland, but this may be due to the fact that their expectations have been lower than for DA and EN. It may also reflect the fact that the DE segment has the highest proportion of cruise ship tourists, for whom the vast majority of activities are carefully guided and organised, so there has not been the same need to ask the locals for advice or directions.

**In perspective**

Overall, there do not appear to be major language difficulties for tourists. However, it is clear that good English skills amongst the Greenlandic population will minimise any language barriers in relation to tourists in the future.

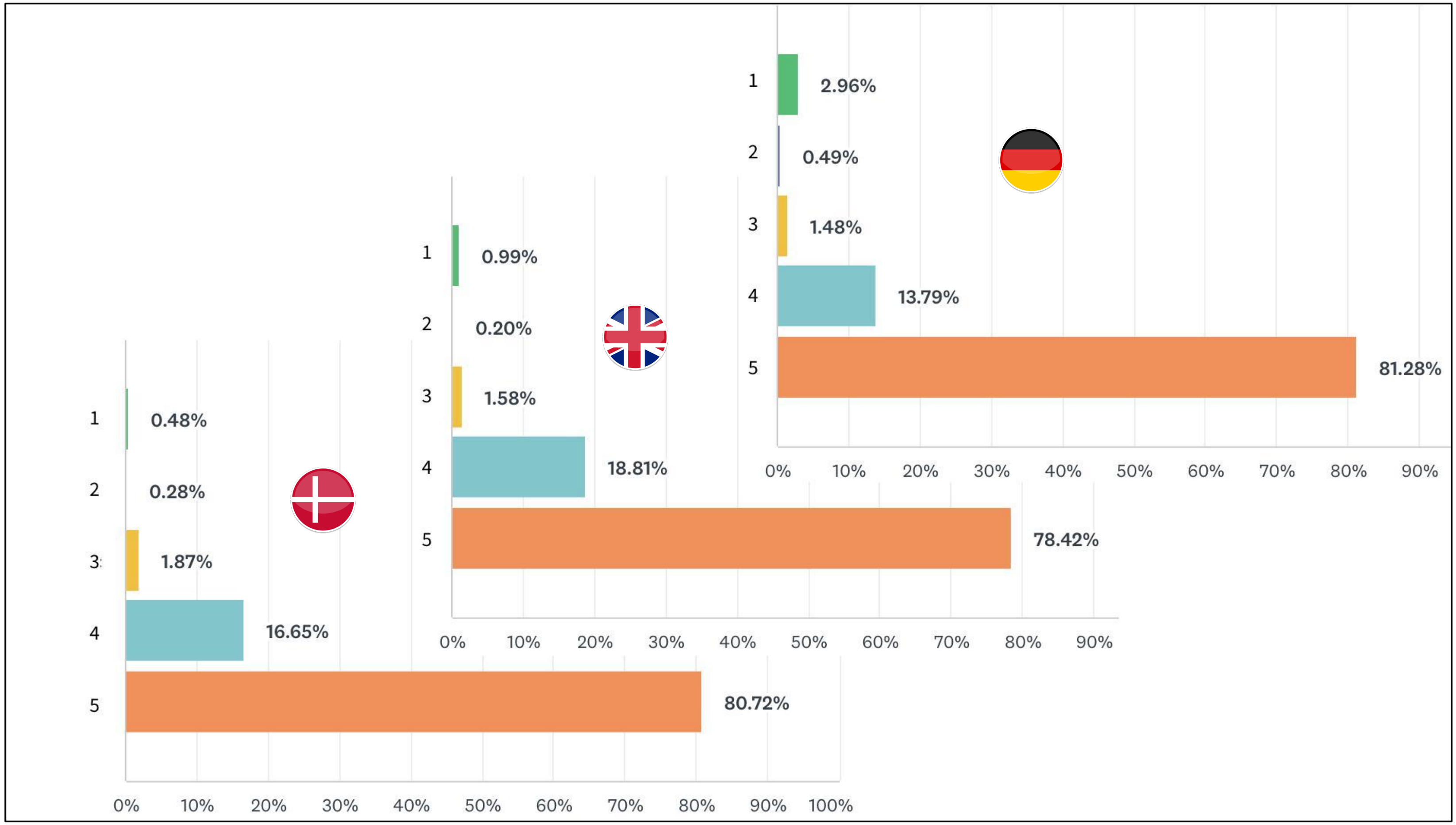
# Q29: Satisfaction with the trip (on a scale)

**In perspective**
If you take a quick look at the graph on the right, it is pretty clear that the immediate impression is particularly positive.

In terms of the language segments, DA, EN and DE score either 4 out of 5 or 5 out of 5 in 97.4%, 97.2% and 95.0% of cases respectively, which is very impressive. It is worth noting, however, that the DE language segment has awarded both the highest number of 1 out of 5 scores and the highest number of 5 out of 5 scores of the three language segments.

It should be taken into account that the respondents have signed up to participate in the survey themselves and have thereby exhibited a positive attitude towards the theme of 'Greenland' by taking part.

It is not difficult to imagine that previous Greenland tourists who were not satisfied with their trip to Greenland would be much less willing to sign up for a competition in which they could win a gift voucher involving travel to Greenland.



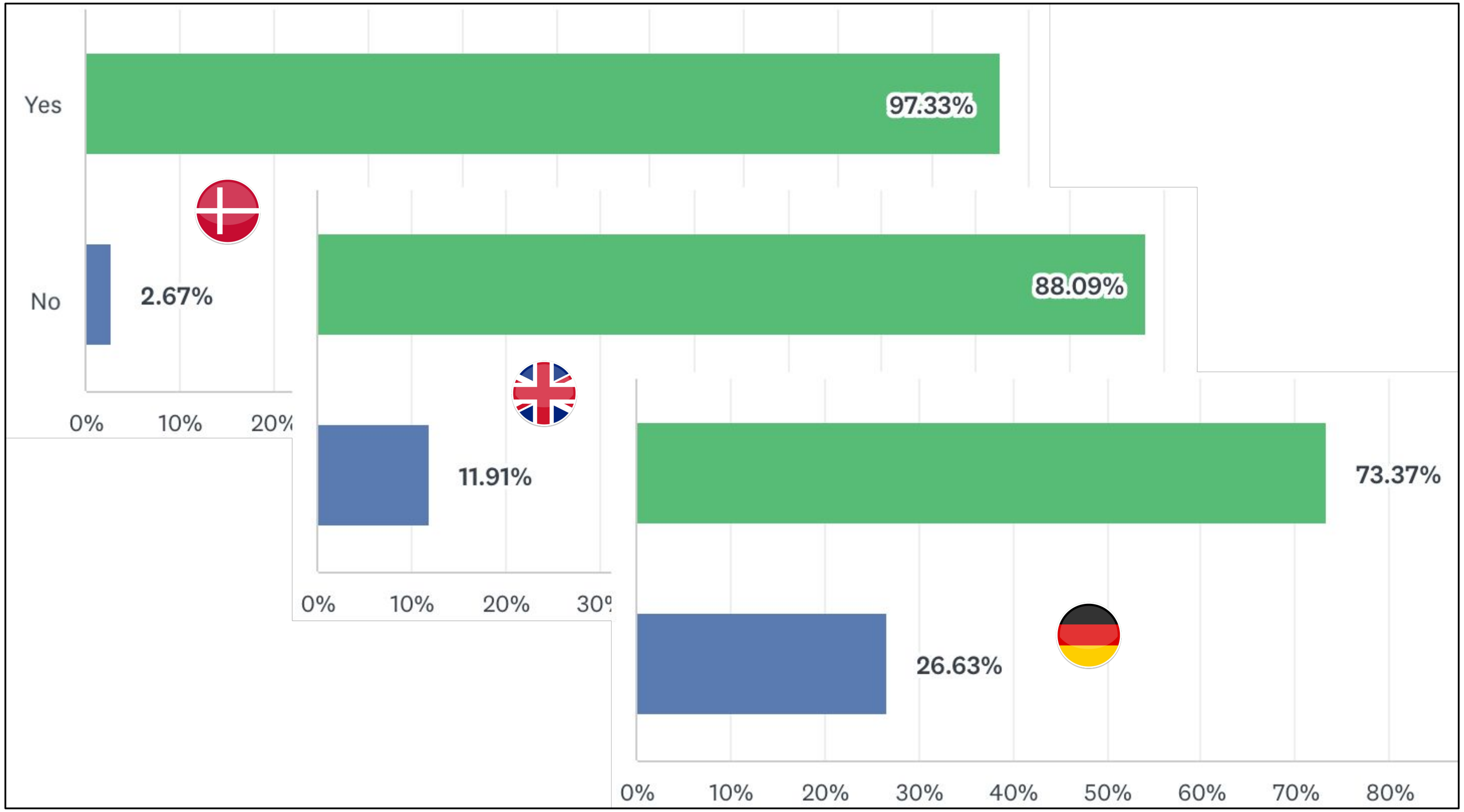
# Q32: Consideration of whether to visit Greenland (amongst those who have not yet visited Greenland)

**In perspective**
The figures on this page should be regarded with caution, as we have a sample that has signed up for a competition in which the prize is a travel gift voucher to Greenland. It must therefore be assumed that they are already positive with regard to the idea of travelling to Greenland.

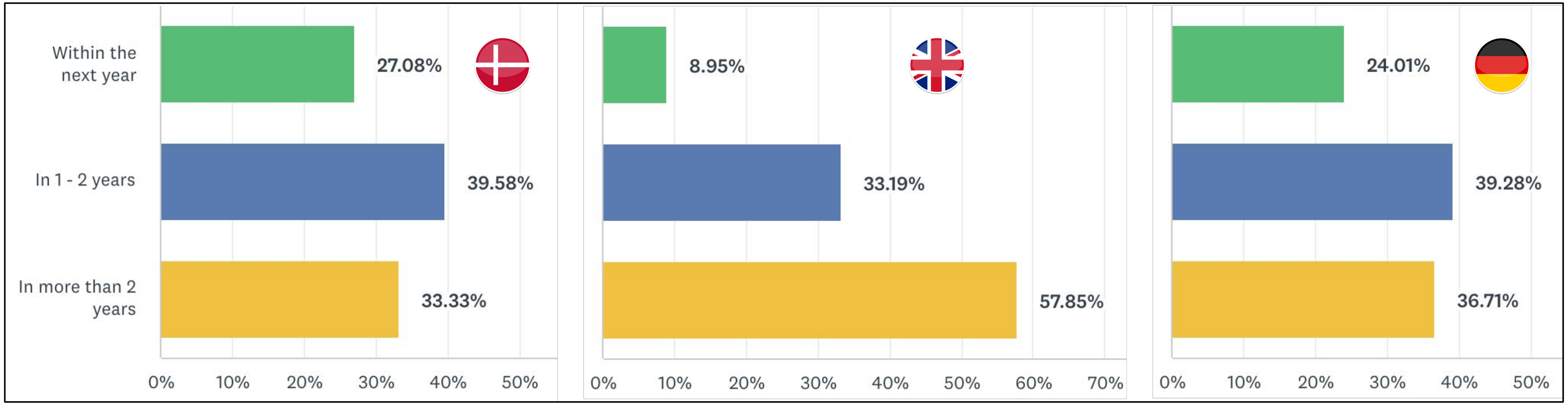
What perhaps provides greater insight is to look at the difference between the three language segments. DA respondents are clearly the most positive, whilst DE respondents are the most 'cautious'.

In any case, it says something about where they are in their considerations of whether to visit Greenland, and it appears as if the DE segment takes longer to decide whether to purchase a trip to Greenland.

What it may take to bring them closer to a decision in this regard can be hypothesised on the basis of other data in this survey.



# Q33: When potential tourists think they will visit Greenland



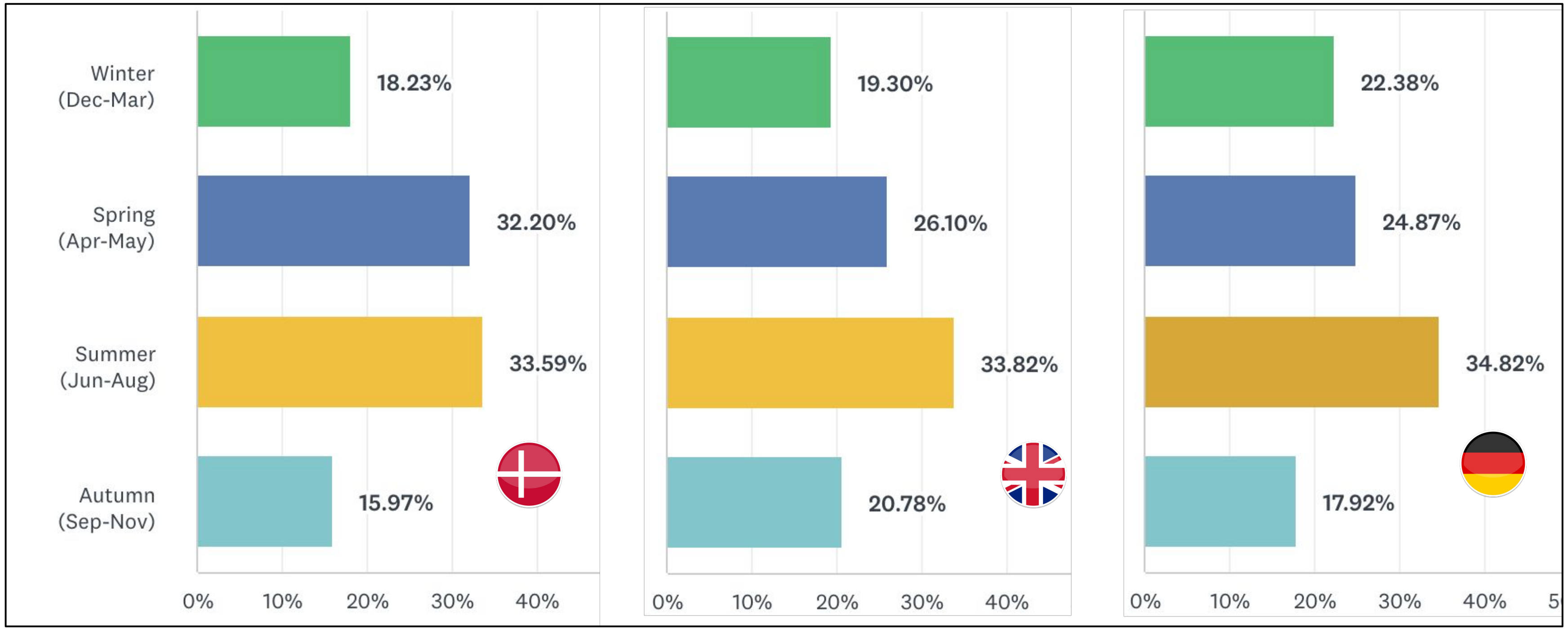

**Overall remarks**

The patterns for DA and DE are very similar, whilst the EN segment is clearly the most 'conservative' in terms of the point of time in the future when they think they will visit Greenland – although perhaps in reality this is simply an expression of a more realistic estimate.

**In perspective**

In January 2023, market research company NIT Kiel once again conducted a major analysis of the Scandinavian, German, French, British and North American markets (DA, SE and NO each with 2,000 respondents respectively, 3,000 in Germany, 3,000 in Great Britain, 3,000 in the USA and 500 in Canada). In this case, it is interesting to see how many answer that they 'will definitely plan a trip to Greenland within 2 years', which resulted in DK/SE/NO: 5.1%, DE: 3.7%, FR: 2.0%, GB: 4.1% and US/CA: 9.2% respectively. Note that this is a random, though representative, section of the populations in the countries concerned. The percentage figures correspond to absolute numbers in the populations of DK/SE/NO: 0.8 million, DE: 2.3 million, FR: 0.9 million, GB: 1.9 million and US/CA: 10.8 million. These figures are disproportionately higher than the number that could realistically be expected to travel to Greenland within the next 2 years, so it is very much an expression of the fact that there is a great readiness to purchase a trip to Greenland – in the right circumstances. It is often the case that people take advantage of 'the right offer at the right time', and here Greenland is in fierce competition with other – and considerably cheaper – adventure destinations that in many ways represent 'lower hanging fruit' – so for Greenlandic tourism operators it is a question of being aware of the competitive parameters and trying to find the 'triggers' that actually result in people going ahead and booking their trip.

# Q34: In which season potential tourists would like to visit Greenland

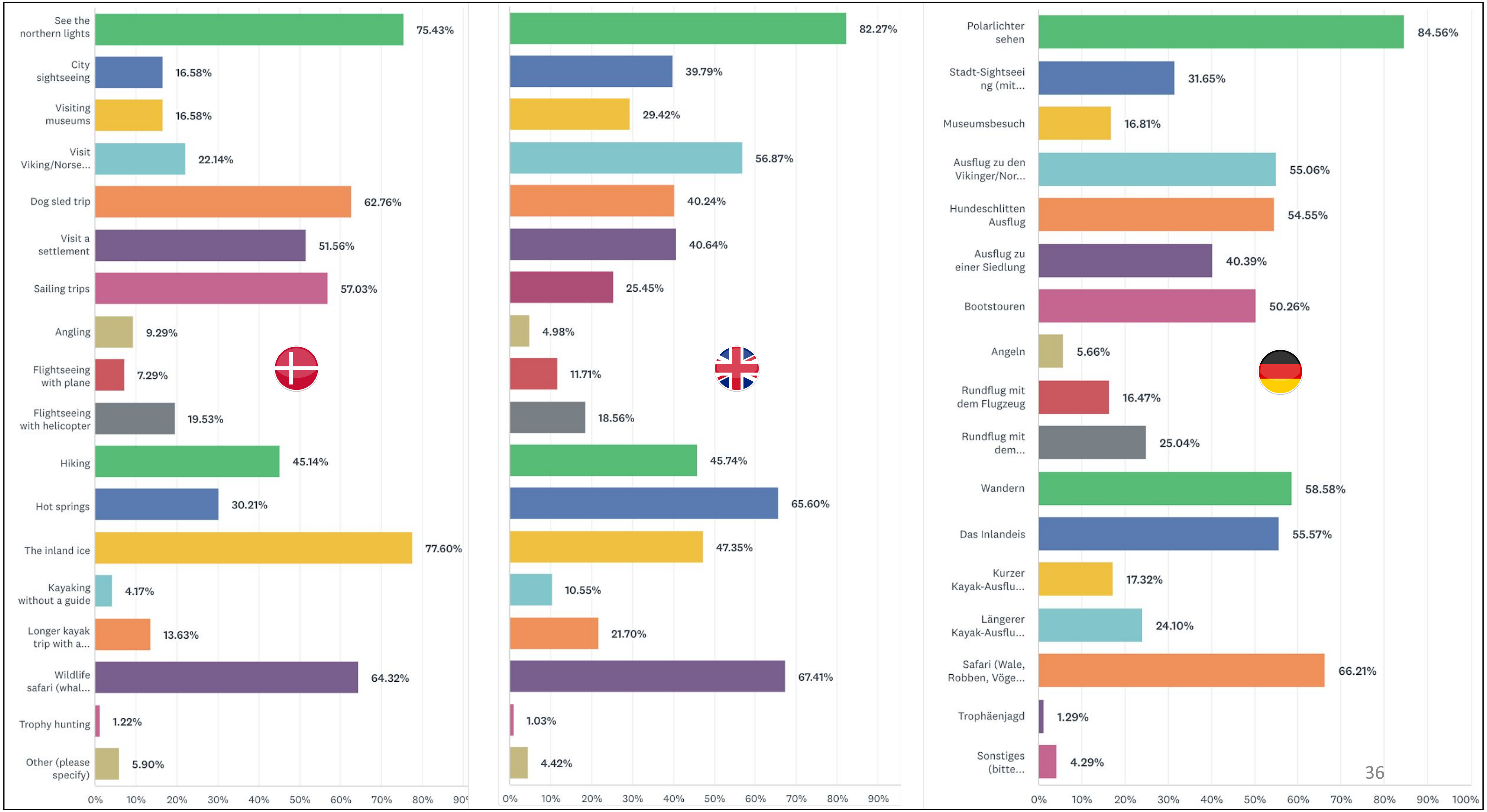



**In perspective**
NB: A minor error has crept into our questionnaire: winter should have been Dec-Feb and spring Mar-May.

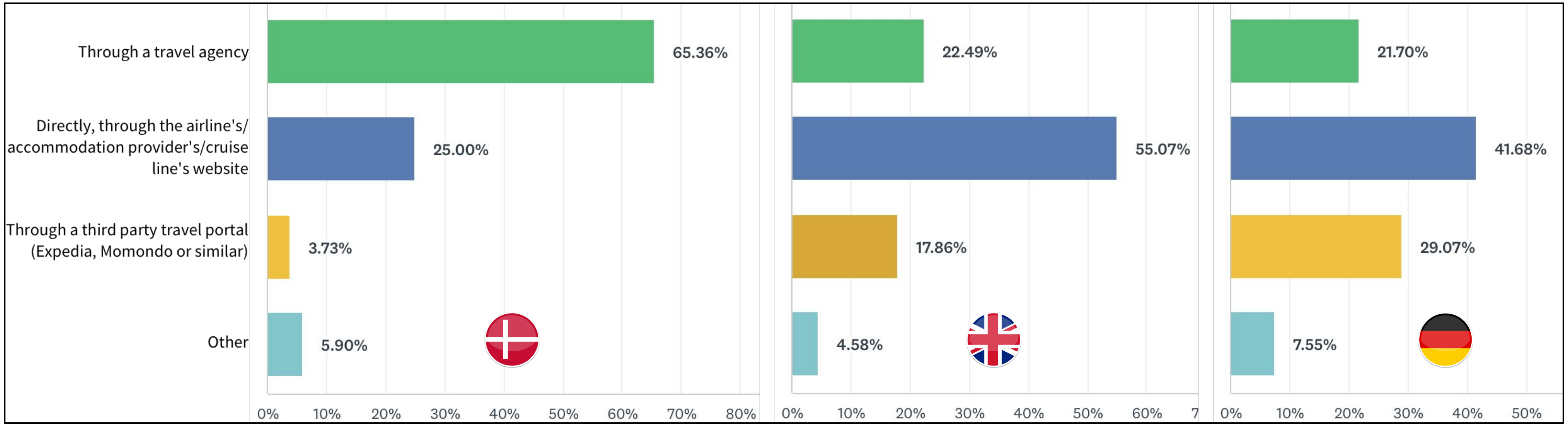
When we compare this data to data from the major NIT market surveys from January 2023, there is a significant overlap, which supports the validity of the data. The trends are quite clear: the summer high season is the most popular, followed by the spring season. This confirms experience in the market in terms of the general demand, but at the same time this survey and the NIT market research provide indications that there is relatively good potential in the so-called ‘shoulder seasons’ of autumn and winter.

It is an established fact that the sustainable development of tourism is also a question of spreading the flow of tourism across different geographical areas and throughout the year in order to exploit the installed capacity in the optimum manner – and to provide the best conditions for year-round employment in the tourism industry. Based on the available data, we can see – at least on paper – that there IS greater potential for shoulder seasons than is currently exploited at present, which is very positive.

# Q35: Which types of tourism experiences are in demand (amongst those that have not yet visited GL)



# Q36: How potential tourists expect to book their trip to Greenland




**In perspective**
Objectively, DA respondents appear to be more traditional, as they generally prefer to book through a travel agency, but – again – there is a considerable over-representation of older respondents. In the data, we can see that there is a clear correlation between age and preference for booking method – the older the customer, the more likely they are to book package holidays through a travel agency, whilst younger customers are more likely to book directly online with the provider themselves. The age distribution for the EN and DE language segments is more balanced, which gives a better and more representative picture of the general trends.

**Remarks to the graph on the previous page** (Which types of tourism experiences are in demand)
The data confirms for the vast majority the knowledge that we already have. However, it is perhaps surprising that 'Hot springs' are in such great demand. In South Greenland we have the 'Uunartoq' hot spring, which is relatively popular amongst tourists and a 62-degree hot spring near Ittoqqortoormiit, which is not visited by many tourists. However, hot springs is not a product we can offer at many places in Greenland. It is probably part of a 'wellness' context, and perhaps for a number of respondents it is also a question of confusing Greenland with Iceland.
Other issues currently include the limited possibilities for wildlife safaris other than whale safaris, and seeing muskoxen and reindeer from aircraft and helicopters – if you are not prepared to hike a long way to find them on foot.
Finally, there are issues with sufficient capacity on dog-sled tours, since the number of sled-dogs has seen a dramatic decline over recent years.

# Q37: Which type of overnight accommodation is preferred

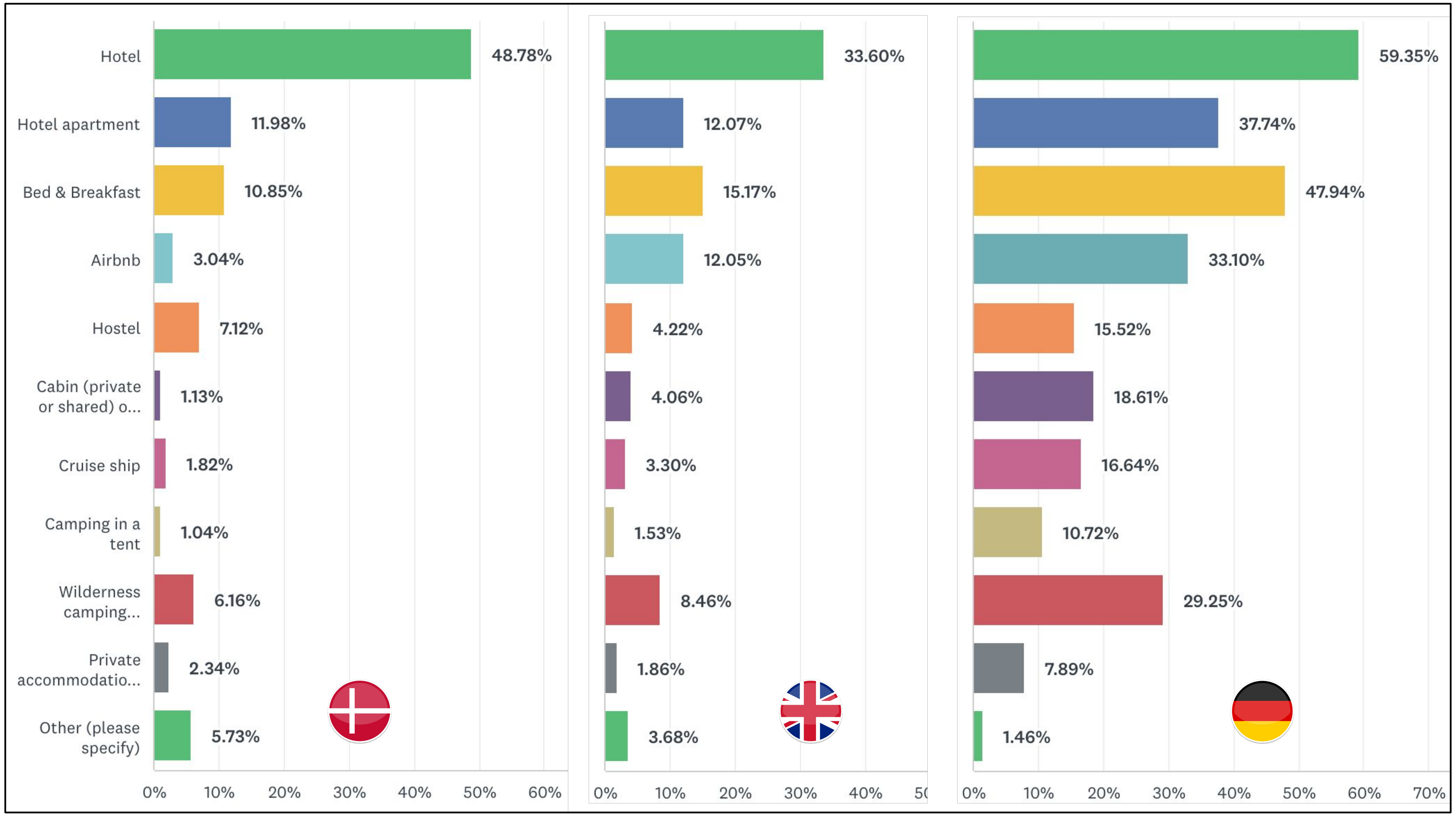
**In perspective**
The pattern for DA and EN is very similar, where hotels are the dominant preference. For DA, it is puzzling that 'Private accommodation with friends and family' only has a share of 2.3% when we have also seen that a large proportion of those that visit Greenland have actually stayed with friends/family.

The DE language segment distinguishes itself with a more even distribution of overnight preferences.

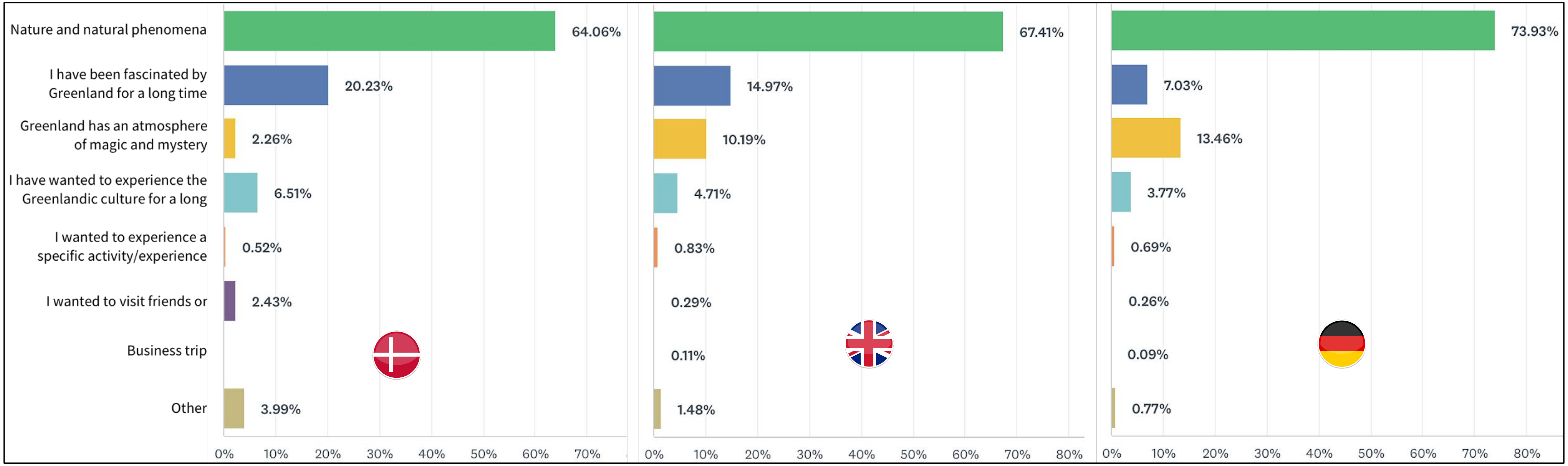
Hotel apartments, B&B, AirBnB and Wilderness camping are considerably more popular than for DA and EN.

Cabins on Sarfaq Ittuk, Cruise ships, Hostels and Camping in a tent also make up a significantly greater proportion than for DA and EN respondents.

In most small towns in Greenland, hotel capacity is limited, but there is often a hostel or B&B. If we wish to spread tourists out geographically, it is therefore good that there are segments that are not afraid to try different types of overnight accommodation.



# Q38: The primary reason for wanting to visit Greenland (for the first time)

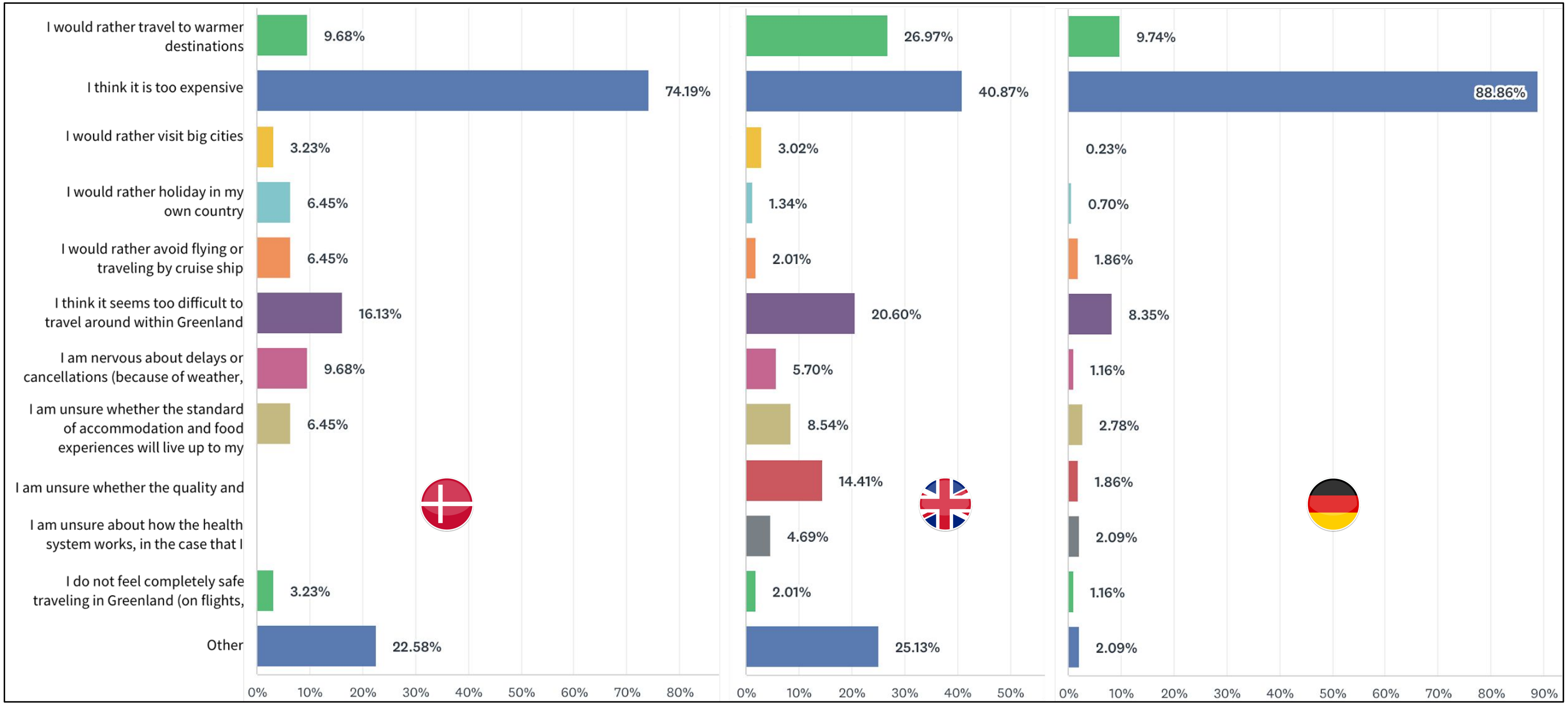



**In perspective**

When we compare this data to the NIT data from 2023, it corresponds very well to the preferences of the NIT respondents. Over half of those who wish to visit Greenland want to experience 'Stunning scenery', 'Natural phenomena', 'Wildlife', 'Glaciers' and 'Traditional villages'.

However, it is somewhat surprising in this survey that so few have specified Greenlandic culture, as cultural elements in the NIT results are highlighted to a much greater extent. The two samples are comparable because the respondents in Q38 have not experienced Greenland and only a few percent of the NIT respondents have experienced Greenland. It is therefore surprising that there is such a relatively large difference with respect to the theme of culture. The biggest difference between Q38 and the NIT questions is that the NIT questions are more specific in terms of actual cultural experiences such as 'Eat/drink local specialities', 'Traditional villages', 'Historic sights/events', 'Mingling with locals', etc. The result may also be a bit misleading due to the fact that it was only possible to choose the primary reason in Q38, i.e. it was not possible to choose secondary reasons, which may otherwise have carried considerable weight.

# Q39: Things that stop potential tourists from visiting Greenland




**In perspective**

The predominant reason for people not choosing Greenland – when our destination is in competition with other adventure destinations – is quite clearly the price. One aspect is how much has to be saved up; another aspect is whether you feel that you get enough 'value for money' if you compare to other destinations. It is quite a big decision to spend a lot of money on a trip to Greenland, and people who may otherwise have been ready to visit Greenland often drop their plans, tempted by 'low-hanging fruit' in the form of a good offer at the right time from one of Greenland's competing destinations.