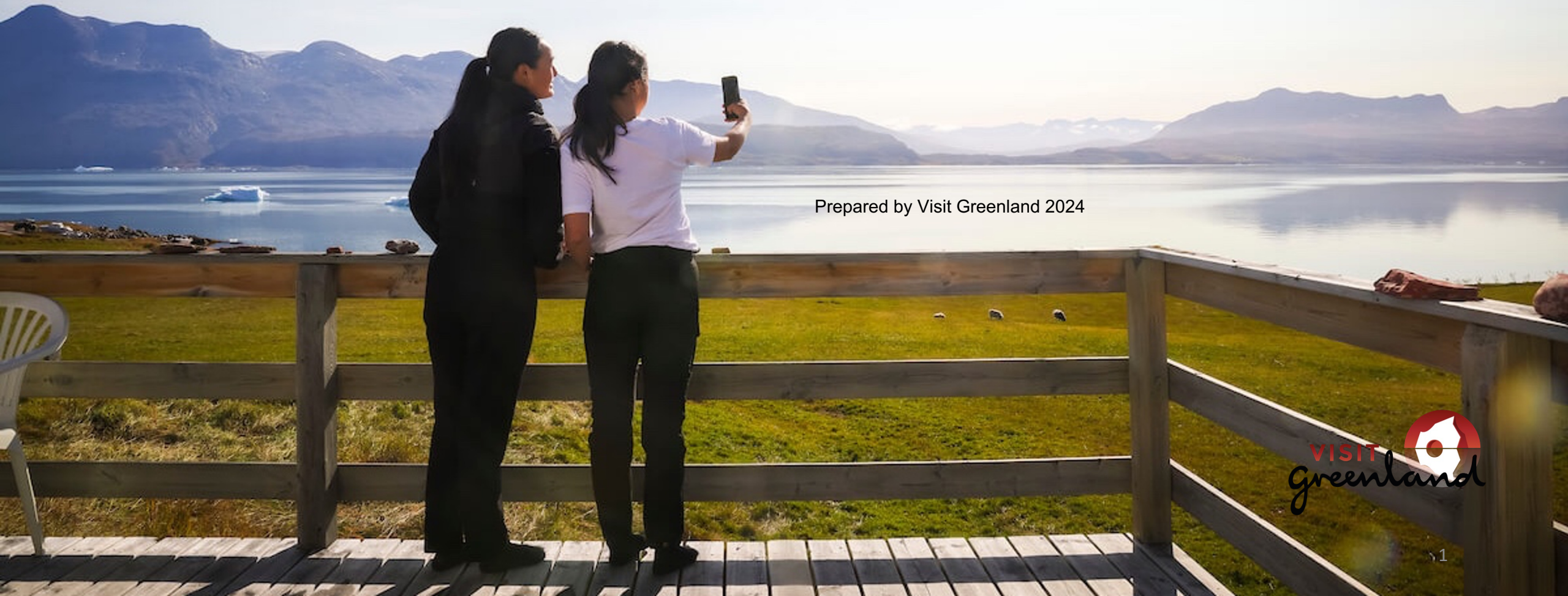


Tourism Statistics Report Greenland 2023



Prepared by Visit Greenland 2024

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Best Year Yet for Tourism in Greenland

2022 was the best year to date in terms of the number of foreign air passengers (including Danish citizens). Data in this report shows that 2023 surpasses 2022 with approximately 9% more land-based tourists, i.e., those who did not go on a cruise. Additionally, 2023 saw by far the highest number of cruise passengers ever—76,477—which is 64.0% more individual cruise passengers than the previous best year, which was 2019, and a whole 73.8% more than in 2022.

More Modest Growth in the Overnight Stay Sector

While there has been relatively high growth in the number of land-based tourists and significant growth in the number of cruise passengers, there was more modest growth in the overnight stay sector in 2023. The outlook is best regarding the number of foreign guests, with growth of 4.0%, where there was growth of 1.3% in the number of foreign overnight stays. Among land-based tourists, there has been a trend to purchase fewer overnight stays than was the case in 2022.

Significant Growth in the Cruise Sector

The growth of a full 73.8% compared to 2022, in the number of cruise passengers, mostly occurred in the regions of West Sermersooq, Kujalleq, and East Sermersooq. In Avannaata, Qeqertalik, and Qeqqata, there have not been significant changes compared to 2022, when looking at the data for the number of passengers on board ships that docked in each city.

Nuuk, Paamiut, Qaqortoq, Nanortalik, Tasiilaq, and Ittoqqortoormiit together represent a growth in the number of passengers of a whole 112.2% compared to 2022. There were 621 visits in 2023 compared to 421 in 2022, which is an increase of 47.5%.

Breakdown in the Air Passenger Registration System

Unfortunately, there was a complete breakdown in the system used to register the country of residence for air passengers at the six airports where departures from Greenland occur. However, most of the data has been successfully recreated using other data sources. Generally, appropriate precautions should be taken regarding the growth rates comparing 2023 with 2022 concerning air passenger data.

Population's Attitudes Towards Tourism

From January 22 to February 22, 2024, Visit Greenland conducted an online survey among Greenlandic citizens where 2,614 responded in the Greenlandic language version and 818 in Danish. The survey shows that the population still has a very positive view of tourism in the country, consistent with the surveys conducted in 2019, 2021, and 2022. However, there is also concern and dissatisfaction with the increasing number of cruise guests coming to the country. The full report can be read at vg.gl/bef24.

Socio-Economic Gain from Foreign Tourism

Visit Greenland, in collaboration with Air Greenland, Greenland Airports, Sikuki Nuuk Harbour, AECO, Nalik Ventures, and Grønlandsbanken, has prepared an analysis of the socio-economic gain from foreign tourism in Greenland 2023. Among other things, it shows that the money spent by tourists and cruise operators during their travels, which benefits Greenland, amounted to about 1.9 billion Danish kroner, which is significantly more than previously estimated. The full report can be read at vg.gl/ramboll24.

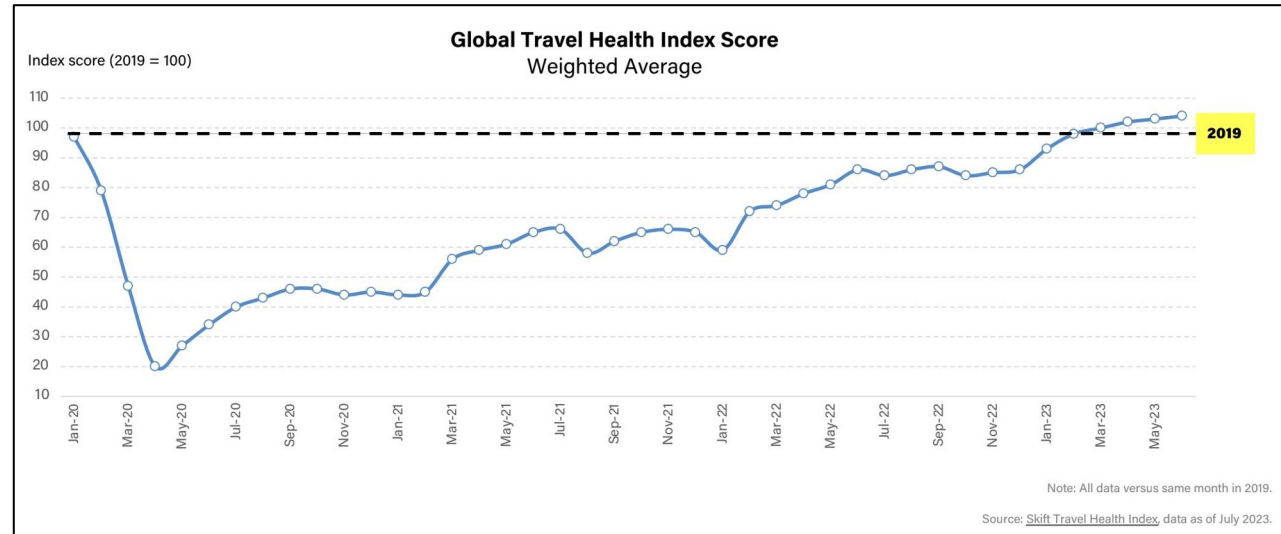
Greenland vs The World



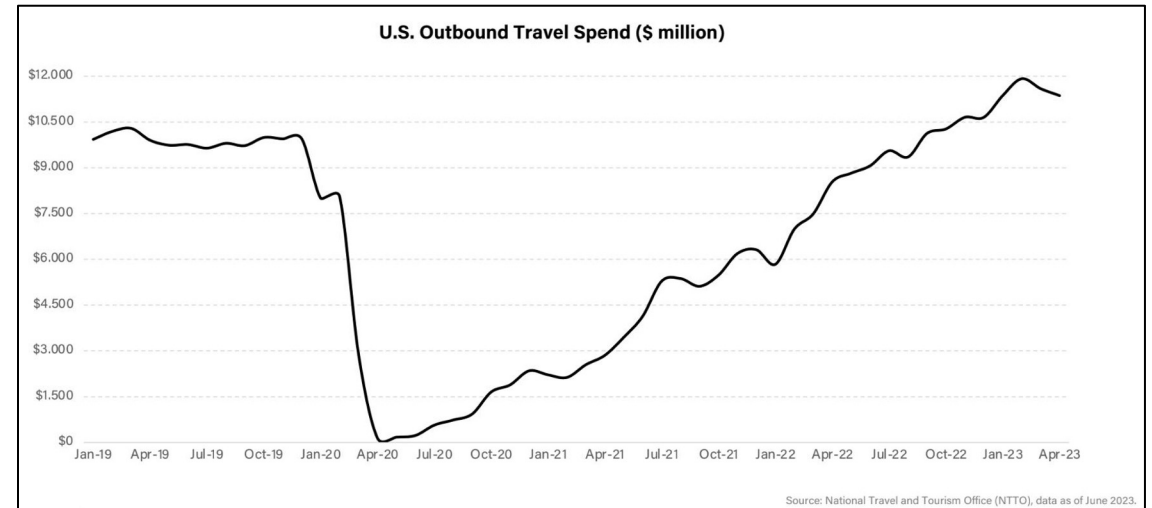
Global Tourism Back Above 2019 Levels

The COVID-19 crisis dealt a major setback to tourism in virtually all countries during 2020, 2021, and part of 2022, but in 2023 global tourism has returned above 2019 levels, and the growth trend appears likely to continue.

Greenland was already back above 2019 levels in terms of land-based tourism in 2022, and nearly at 2019 levels regarding the number of cruise passengers.



As of April 2023, travel spending for trips out of the USA has surpassed the 2019 level by \$2 billion.

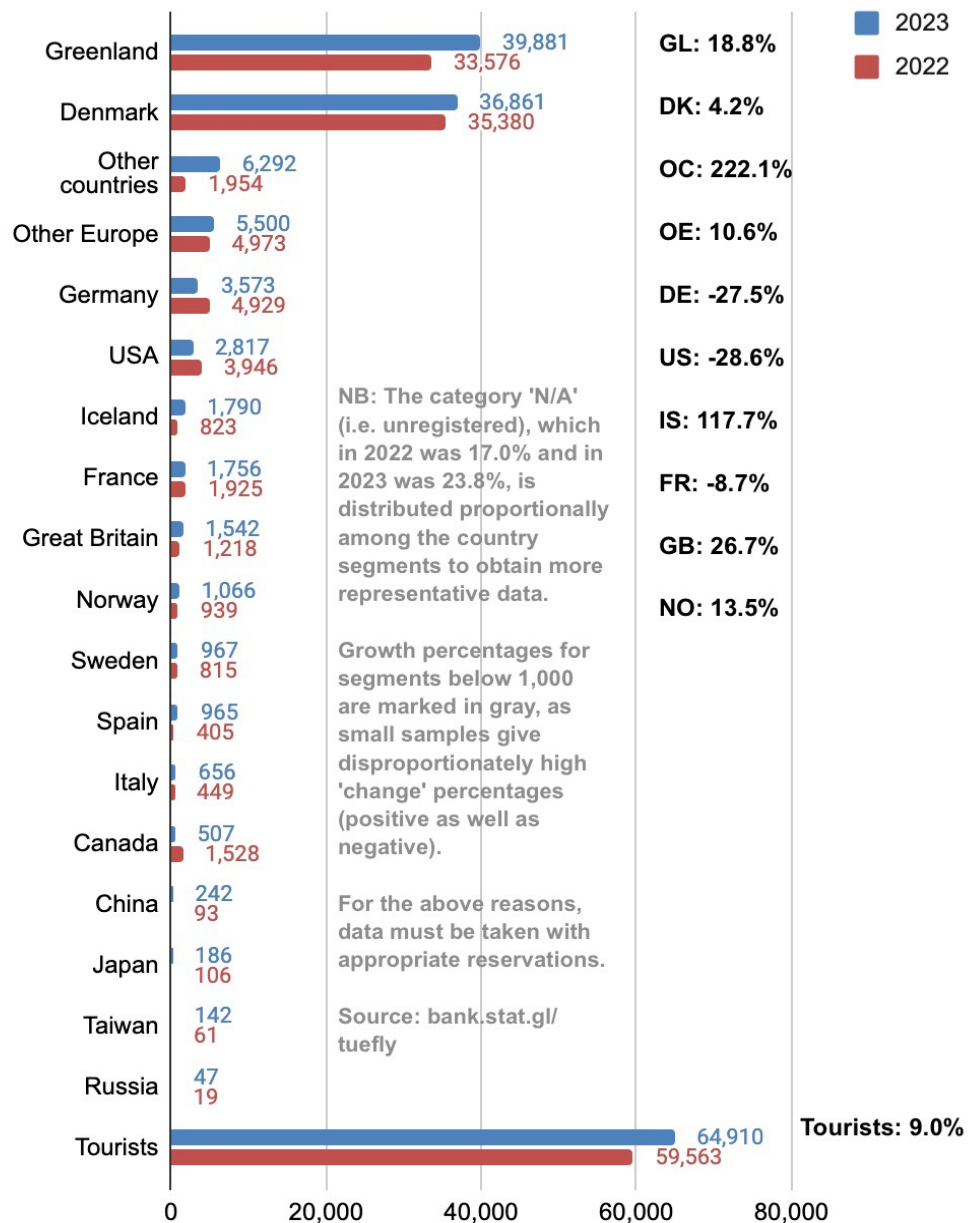


As of January 2023, the number of overnight stays in Europe was back to the 2019 level.



The national development in 2023

No. of plane passengers out of Greenland 2023 vs 2022



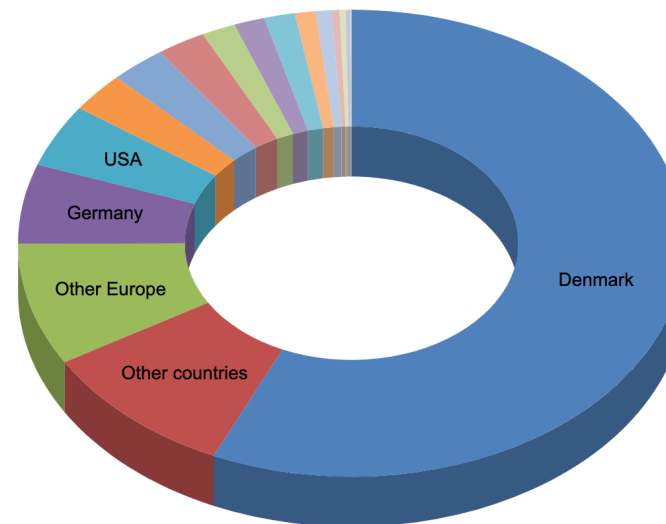
Air passenger statistics

In the 2019 - 2022 reports, the air passenger statistics included 27 countries as well as 'Other Asia', 'Other Europe', and 'Other countries'. In this report, only the 16 country segments shown in the graph on the left are included, as it has not been possible to obtain raw data including the 27 country segments from Greenland Statistics, due to the aforementioned breakdown in the registration system.

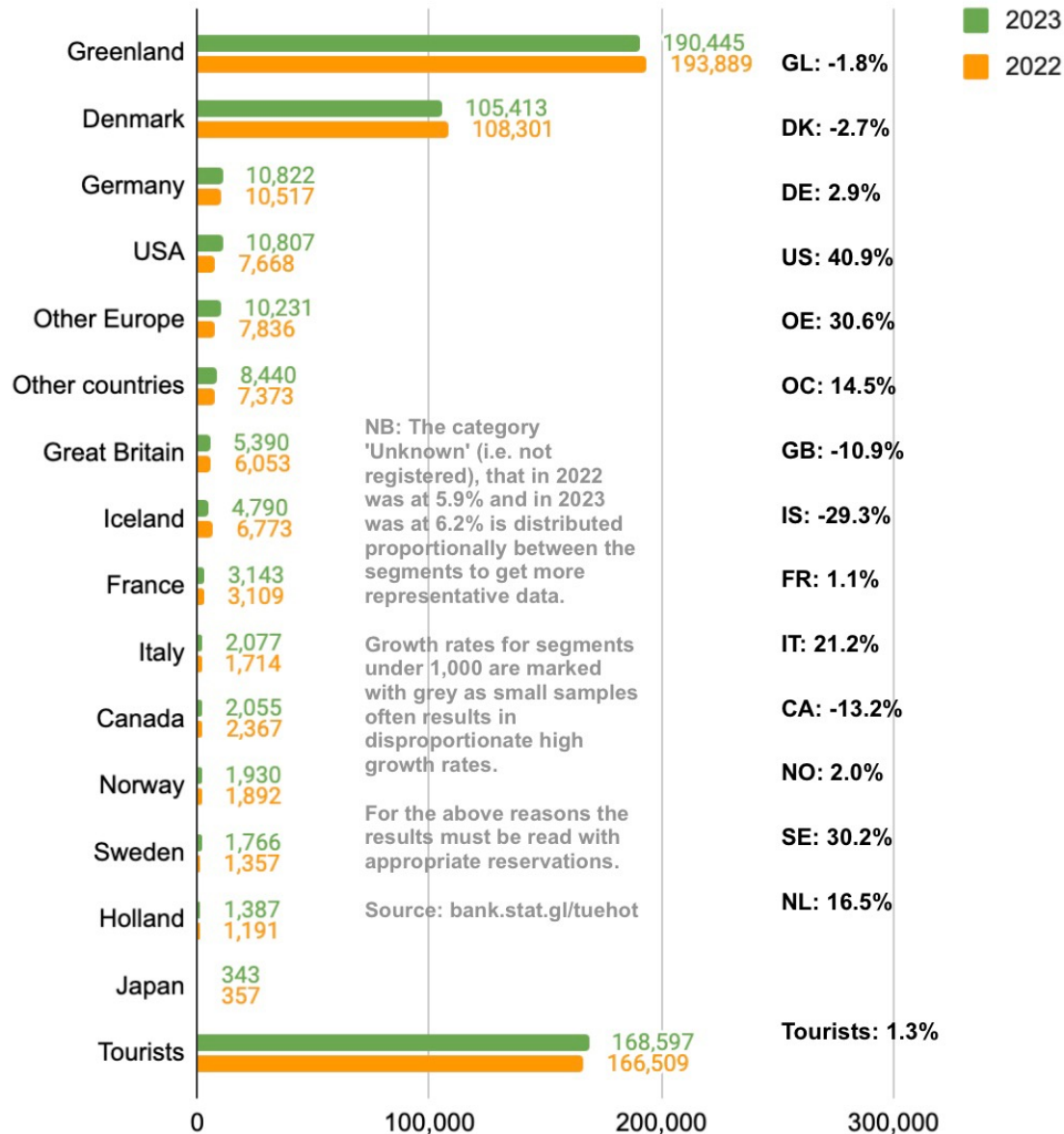
A growth of 9.0% for the tourist segments reflects, as mentioned, the best year for tourism in Greenland ever.

The 9.0% growth should be taken with caution since we only managed to register 76.2% of the air passengers in 2023 and 83.0% of them in 2022.

Historically, Denmark has accounted for about half of all foreign air passengers, but in 2023, the Denmark segment represents a share of 56.8% of all tourism segments.



Overnight stays in accommodations in Greenland 2023 vs 2022



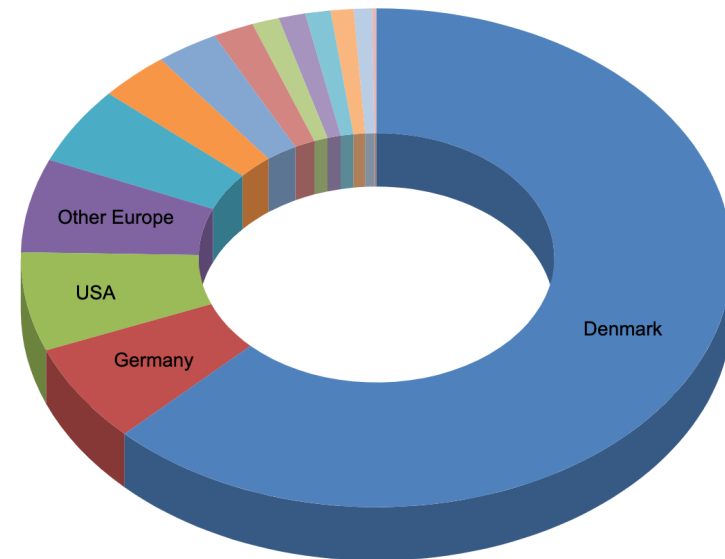
Overnight stays

There are no significant changes regarding the number of foreign (including the DK segment) overnight stays in 2023, just a growth of 1.3%.

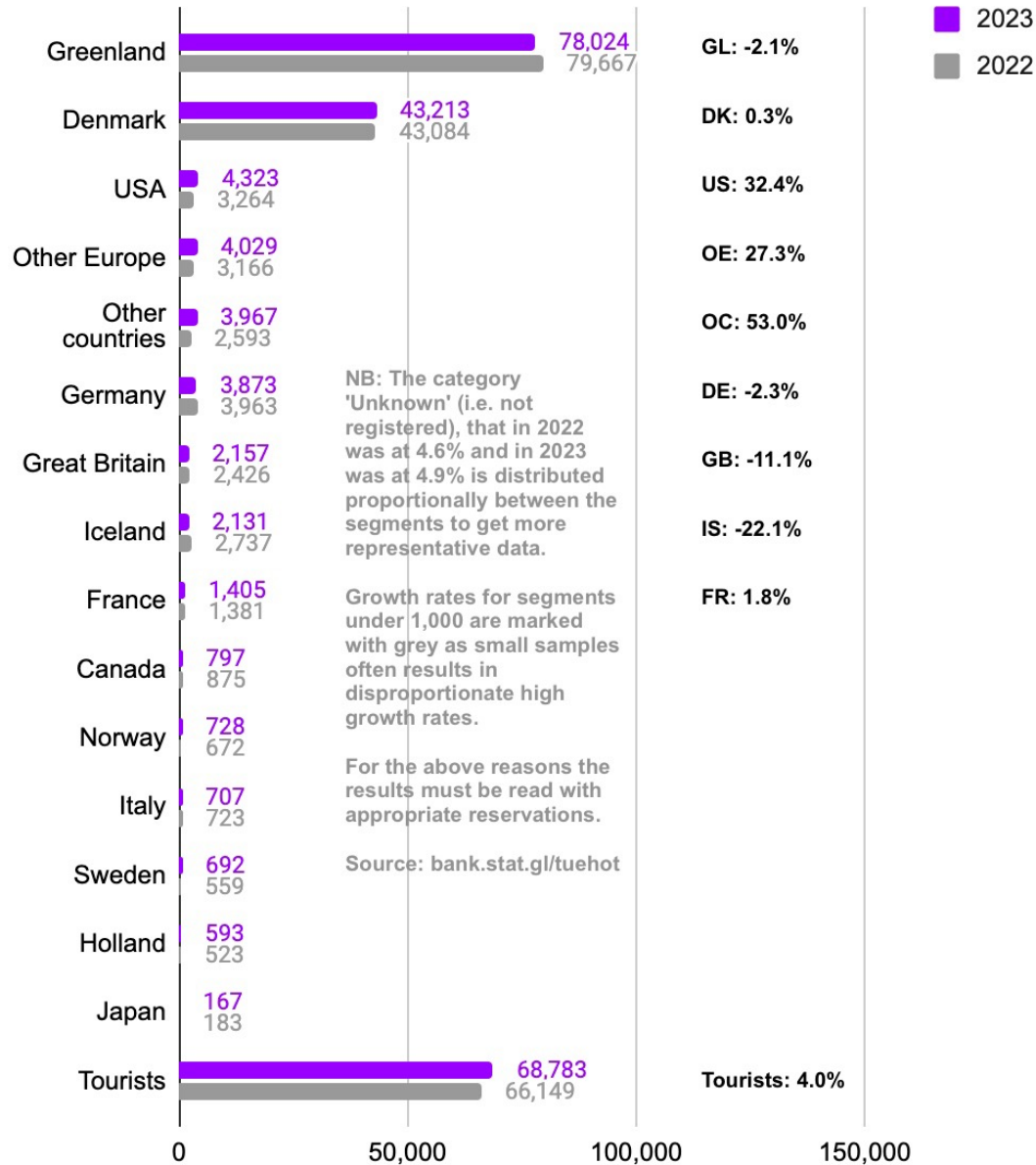
The segments that represent the largest percentage increases are the USA, Other Europe, Other Countries, Italy, Sweden, and the Netherlands.

The segments Denmark, United Kingdom, Iceland, and Canada are declining, with Denmark only down by -2.7%.

Also in the overnight stay sector, the DK segment dominates with a market share of a whole 62.5% of the tourist segments.



Guests in accommodations in Greenland 2023 vs 2022



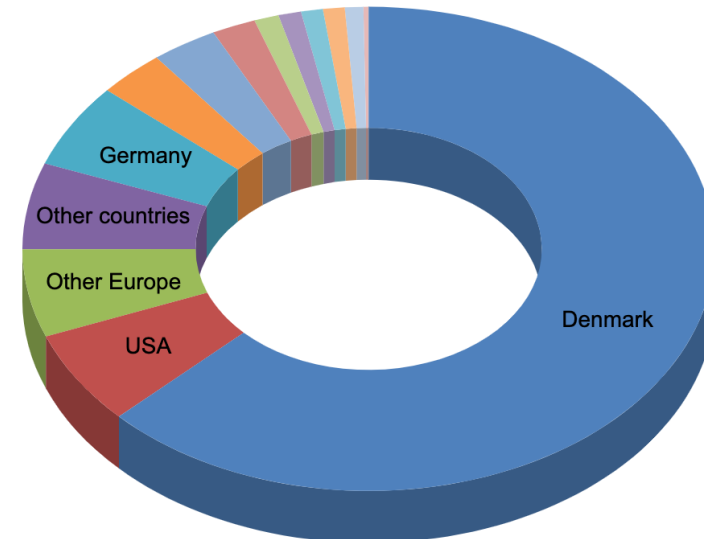
Individual guests

In 2023, there was a growth of 4.0% in the number of individual foreign (including DK) guests.

The approximately 9% growth in the number of foreign air passengers in 2023 is most likely due to the fact that tourists who visited Greenland in 2023 stayed overnight less frequently at registered accommodations than in 2022, according to statistics from Greenland.

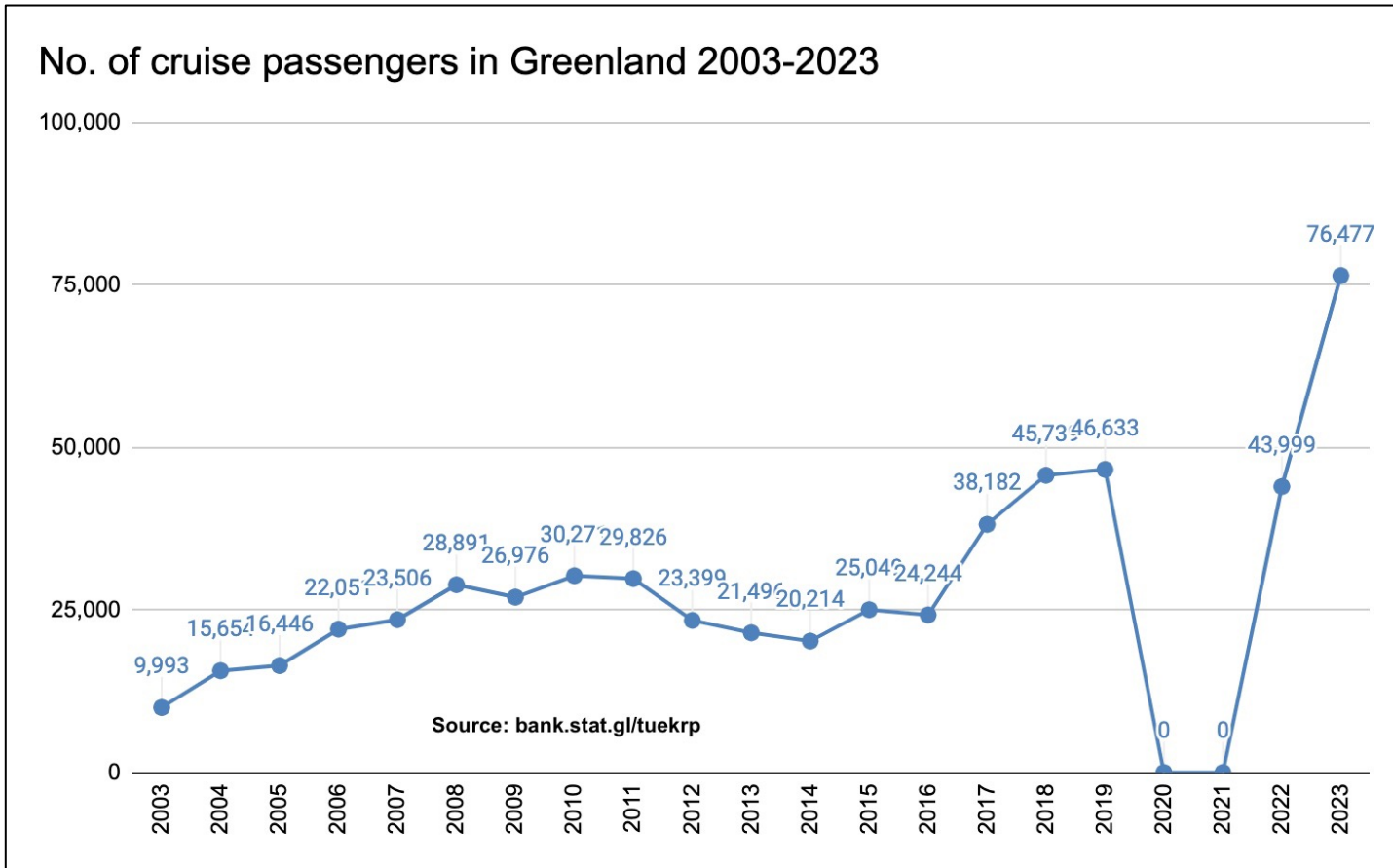
This could also indicate that tourists visited fewer destinations than in 2022, but we cannot say for certain.

Denmark holds a market share of 62.8% in terms of the number of individual guests.



Cruise tourists in Greenland 2003-2023

When looking at the graph below, there are very dramatic fluctuations observed from 2020 through 2023. During the COVID-19 crisis, there was no access for cruise ships in Greenland; access was reopened in 2022, resulting in a significant 'rebound' almost back to the 2019 levels. In 2023, there was a significant growth of 73.8% compared to 2022.



Throughout the summer of 2023, there were several smaller towns that experienced 2 or 3 cruise ships docking on the same day, where hundreds - or in some cases thousands - of passengers had the opportunity to disembark and move around the town.

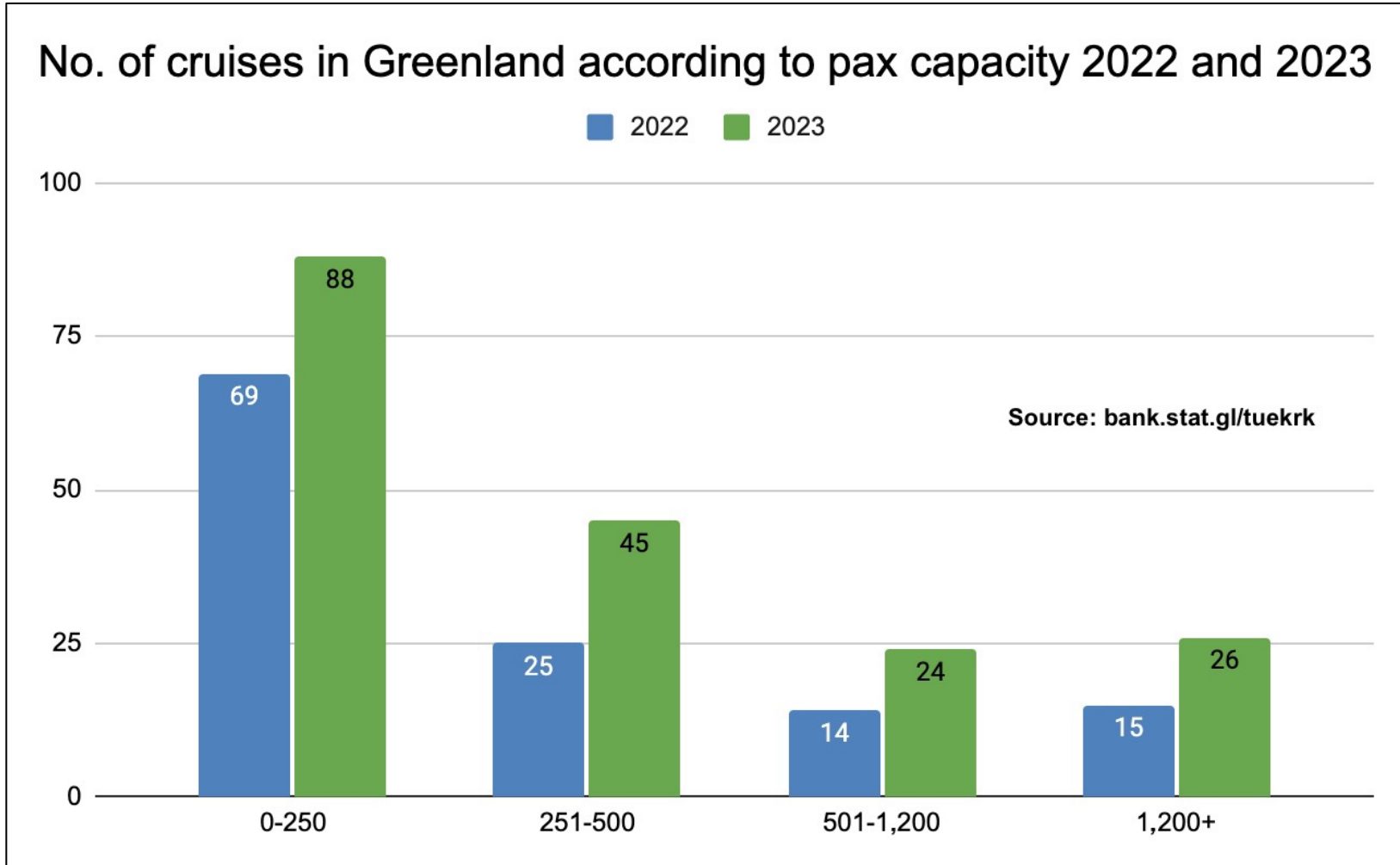
In such instances, the arrival of cruise ships can feel overwhelming for locals, as passengers suddenly can make up a large part of the town scene, in shops and cafes.

Examples of this include 3 arrivals on the same day on August 12, 2023 (522 passengers in total), August 17, 2023 (426 passengers in total), and September 7, 2023 (410 passengers in total) in Ittoqqortoormiit. Note: Only smaller expedition cruises dock at Ittoqqortoormiit/National Park.

There can also be dockings by one or more very large ships, such as on August 5, 2023, in Qaqortoq, where both Zaandam with a maximum capacity of 1,432 passengers and Coral Princess with a maximum capacity of 2,895 passengers had dockings.

Cruise: No. of cruises relative to pax capacity

With a 73.8% increase in the number of cruise passengers, it's clear that there have also been significantly more ships and significantly more voyages. During a voyage, a ship typically visits several cities with the same group of passengers on board, before possibly changing in Greenland. In 2022, 50 different cruise ships visited Greenland with a total of 123 voyages. In 2023, 74 different cruise ships visited Greenland with a total of 183 voyages.



Generally, it is in South and West Greenland that the large ships with over 1,200 passengers pass through Greenland without changing the passenger group, referred to as "turn-arounds."

The ships that visit East Greenland often change passengers in Iceland.

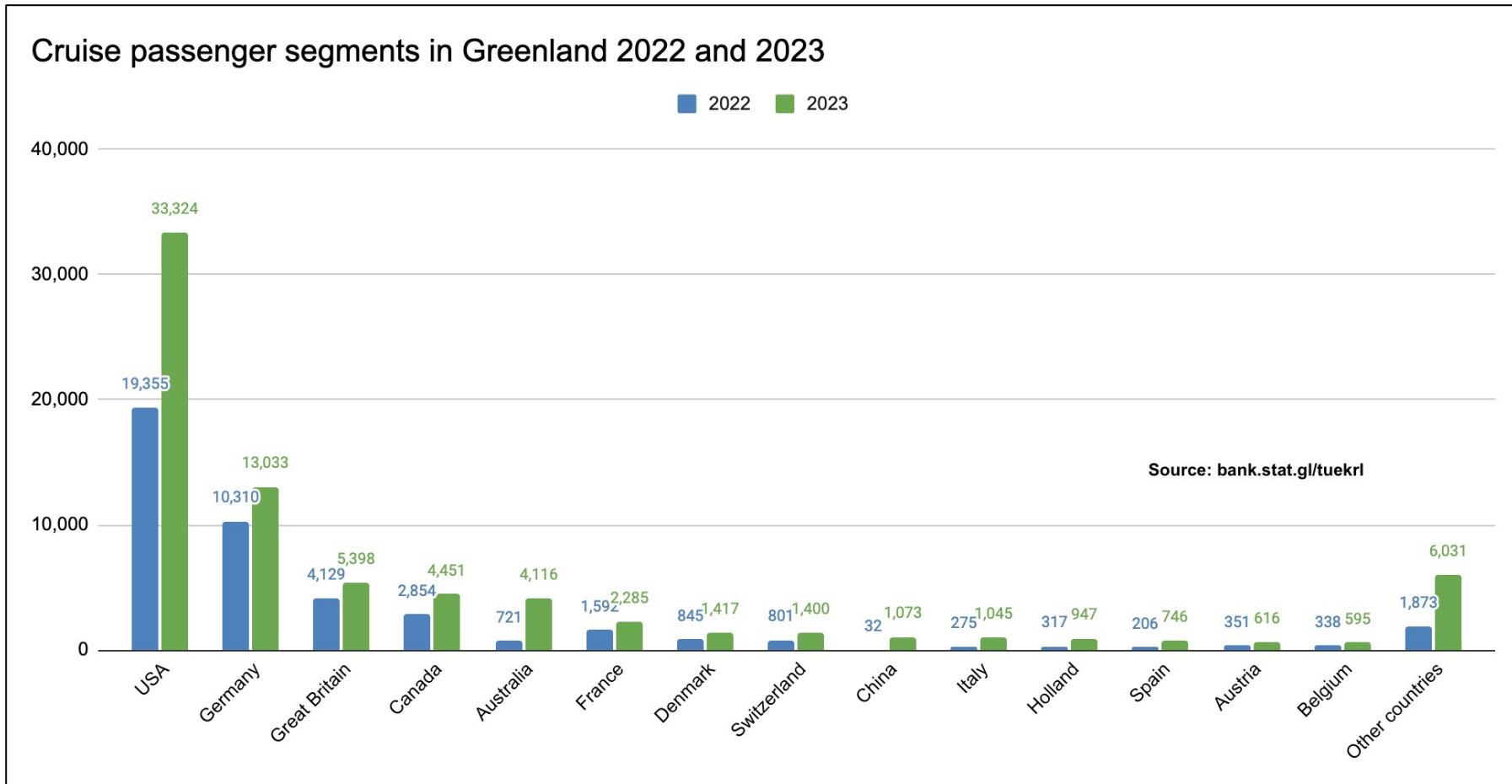
Most cruise ships in Greenland make one or more changes to their passenger group, typically in Kangerlussuaq or Narsarsuaq.

Cruise passenger segments 2022 and 2023



As shown in the graph below, there was a significant increase in the number of passengers from the USA in 2023. The highest percentage growth was in the number of passengers from China, from 32 to 1,073, corresponding to a growth of over 3,000%. The latter is primarily due to the fact that there were still certain travel restrictions for Chinese citizens in 2022.

There was also a substantial increase in the number of passengers from Australia (470%), Italy (280%), and Canada (56%).



The market is strongly dominated by North America, Australia, and Europe, while historical data show a rising—and not insignificant—demand from China.

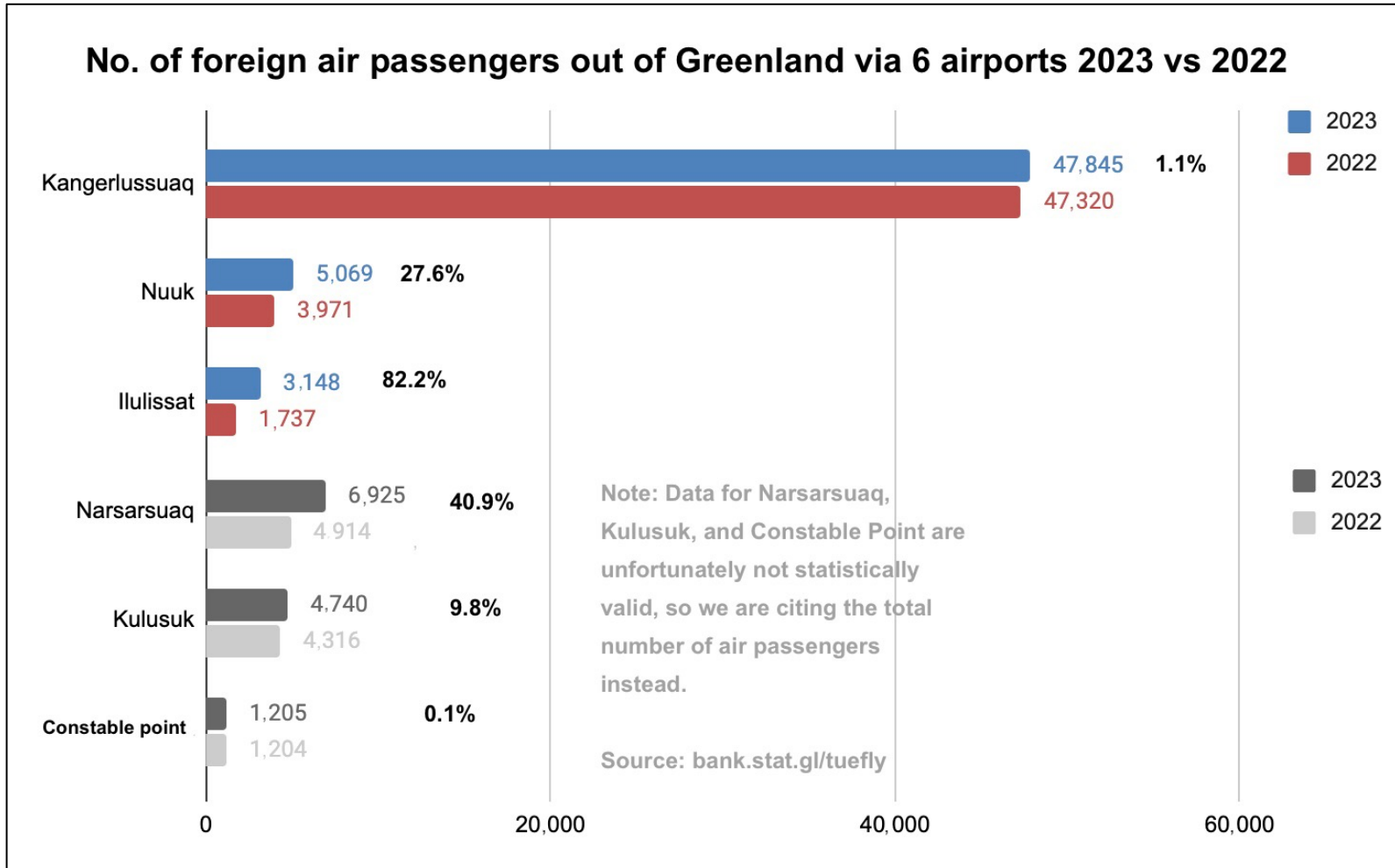
Regional tourism development 2023



Comparing the Regions: Air Passengers out of Greenland 2023 vs 2022



The graph below shows a comparison of the number of foreign (including DK) air passengers on departures out of Greenland via the 6 airports in Greenland where there are routes out of the country. Unfortunately, there are no valid country of residence data for 2022 and 2023 regarding Narsarsuaq, Kulusuk, and Constable Point, and the total number of air passengers on departures out of Greenland from these 3 airports is listed.



It is important not to view the data in the graph as a representation of the number of land-based (i.e. non-cruise) tourists in the respective regions, as the vast majority in 2022 and 2023 traveled out of Greenland via Kangerlussuaq, where Air Greenland’s Atlantic aircraft, for most of the year, has at least one daily departure with capacity for over 300 passengers.

In Narsarsuaq, Air Greenland flew only during the three summer months from Narsarsuaq to Copenhagen using a leased Boeing 737 with capacity for about 180 passengers. Icelandair flew most of the year from Narsarsuaq to Reykjavik, using smaller turboprop aircraft.

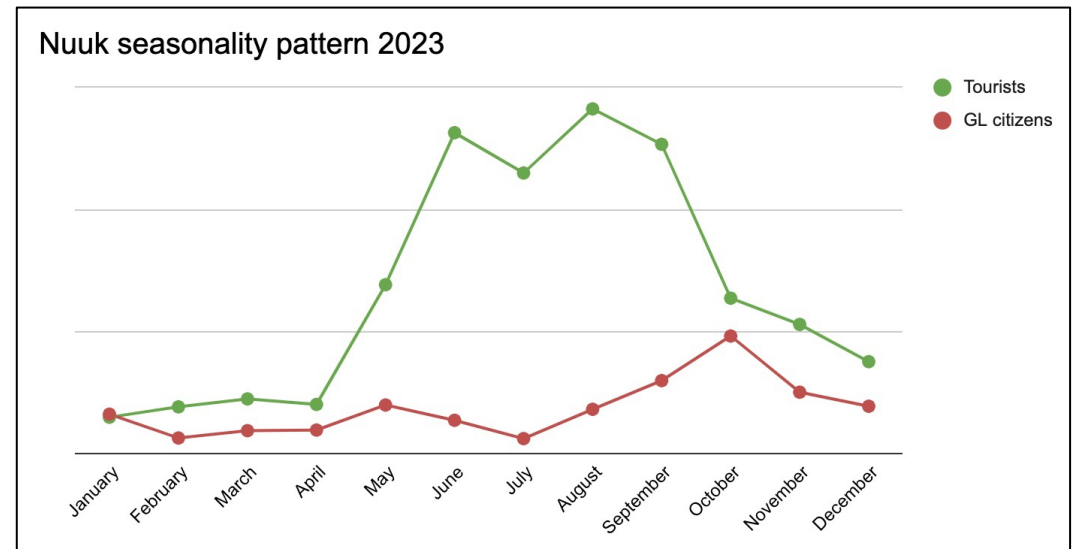
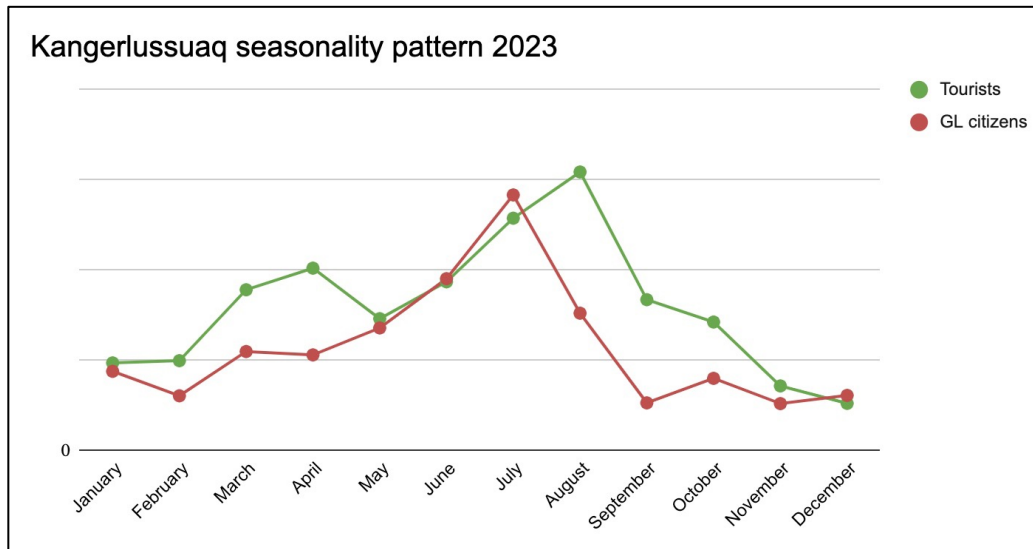
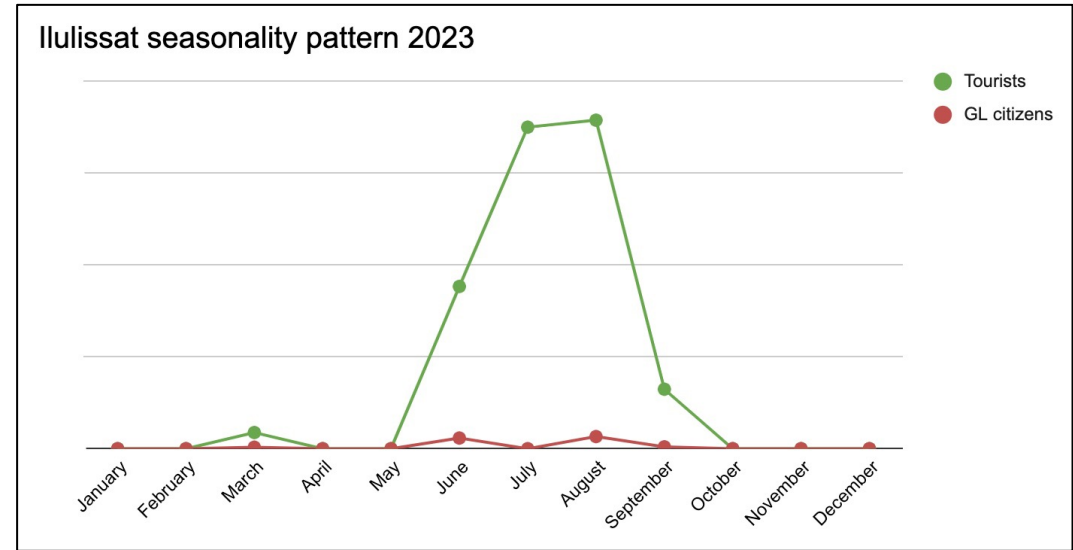
Overall, it can be said that tourists are channeled in and out of West and North Greenland via Kangerlussuaq, Nuuk, and Ilulissat, while tourists to/from South Greenland and East Greenland are channeled via Iceland-Narsarsuaq and Iceland-Kulusuk/Nerlerit Inaat respectively.

Seasonal pattern for 3 airports in 2023, tourists and GL citizens

Statistically valid country of residence data for Kangerlussuaq, Nuuk, and Ilulissat airports are available for 2023. The graphs show the seasonal pattern over the 12 months of the year.

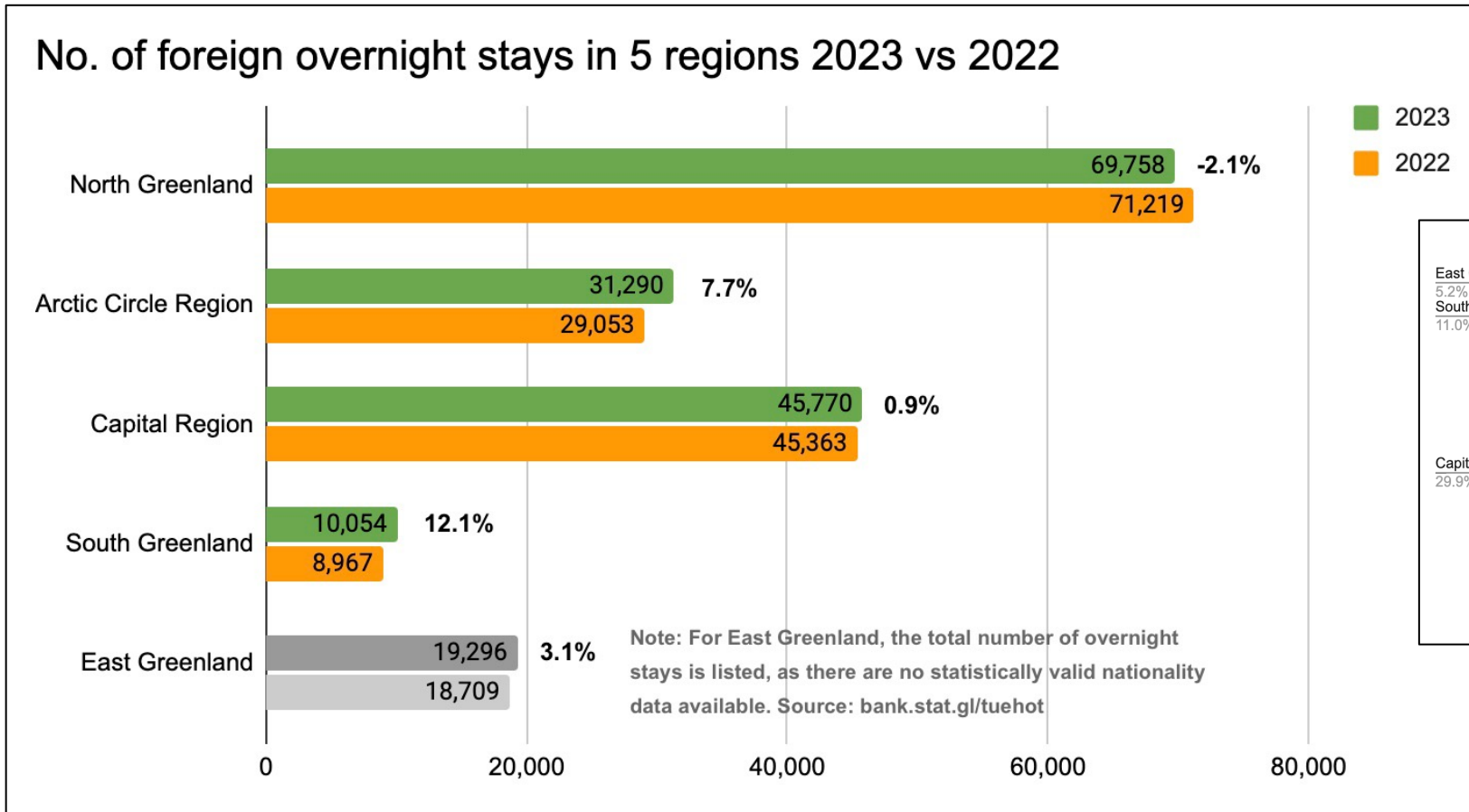
When looking at the volume of passengers on departures out of Greenland via the airports in Ilulissat, Kangerlussuaq, Nuuk, Narsarsuaq, Kulusuk, and Nerlerit Inaat, the distribution is 78.5% via Kangerlussuaq, 6.6% via Narsarsuaq, 6.2% via Nuuk, 4.5% via Kulusuk, 3.1% via Ilulissat, and 1.2% via Nerlerit Inaat.

In Kangerlussuaq and Nuuk, there were departures throughout the year, though most were in the summer months. In Ilulissat, there were essentially only scheduled departures to/from Reykjavik in June, July, August, and September, plus additional departures in March. As shown, the proportion of GL citizens in Ilulissat and Nuuk was quite limited.

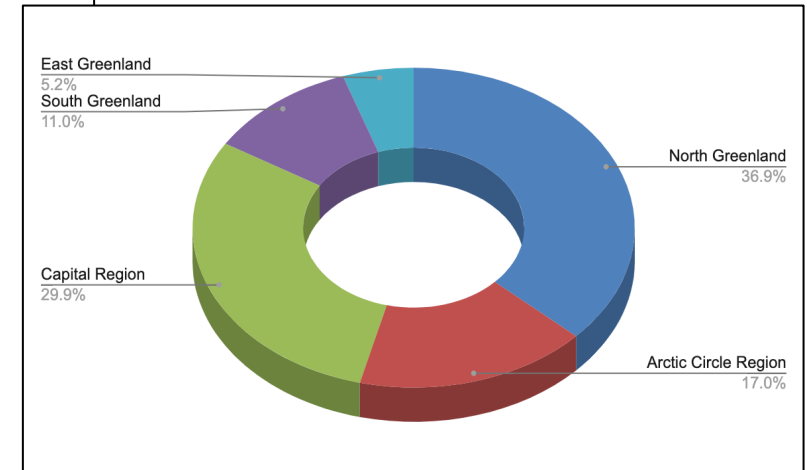


Comparing the Regions: Overnight stays 2023 vs 2022

On page 7, one can see that the average change in the number of foreign (including DK) overnight stays was 1.3% from 2022 to 2023. A closer look at regional data shows that there was growth in all regions, except for North Greenland. Statistically valid nationality data are not available for East Greenland, therefore the total number of overnight stays is listed.



To compare the 5 regions, one can see the relative distribution regarding the total number of overnight stays in Greenland in 2023 below.



Comparing the Regions: Overnight stays, seasonal pattern 2023 vs 2022



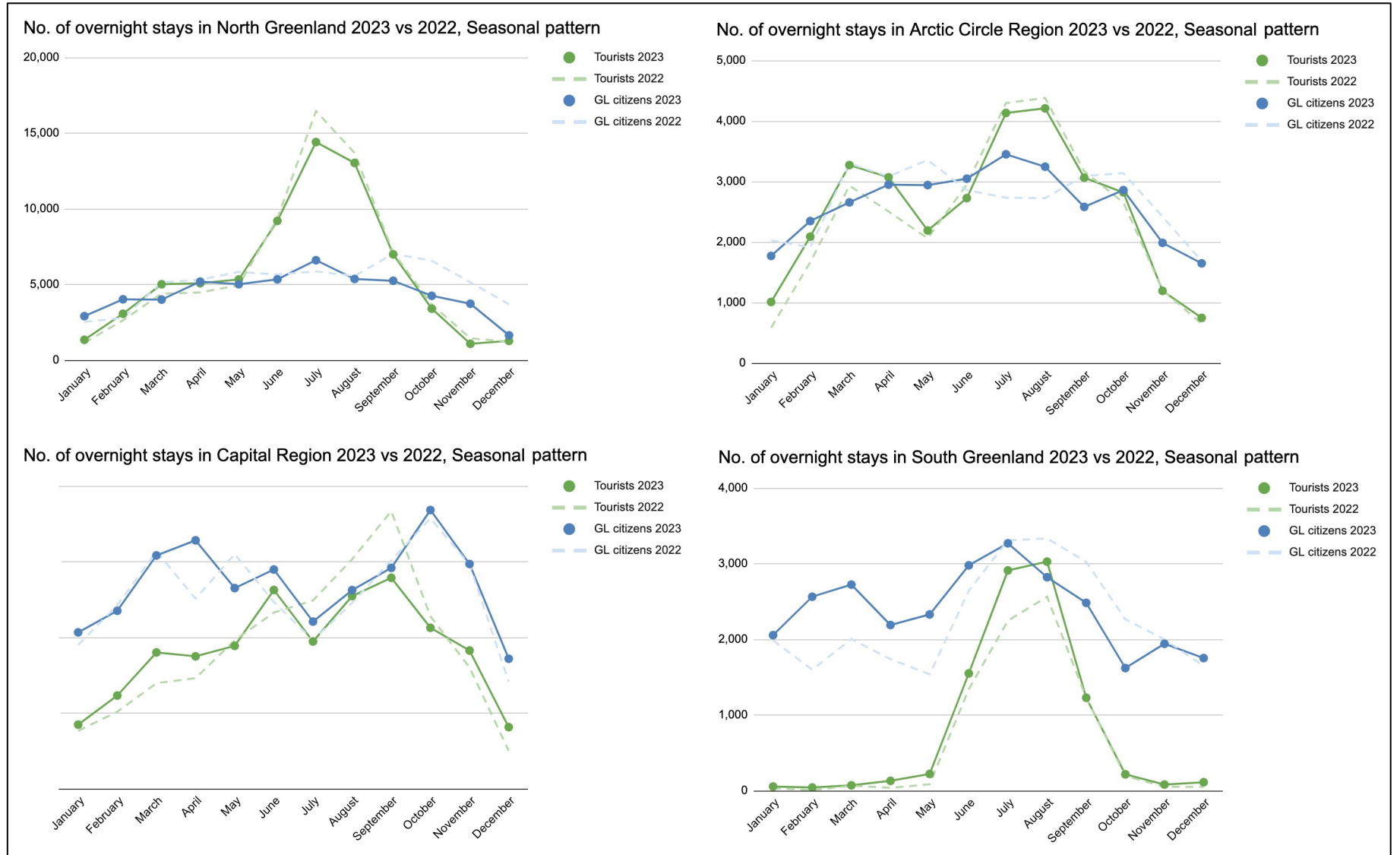
In the graphs to the right, the seasonal patterns in 4 out of 5 regions are compared regarding the number of overnight stays. Unfortunately, there are not enough statistically valid nationality data for East Greenland.

There are 4 quite different seasonal patterns.

Focusing on tourists, especially North Greenland and South Greenland have a typical 'sombbrero'-like pattern, with a distinct peak during the summer months.

Arctic Circle Region has a clear secondary high season in the spring months.

Capital Region is the region with the most even distribution of tourists throughout the year, and unlike the other regions, there is a slight dip in July.

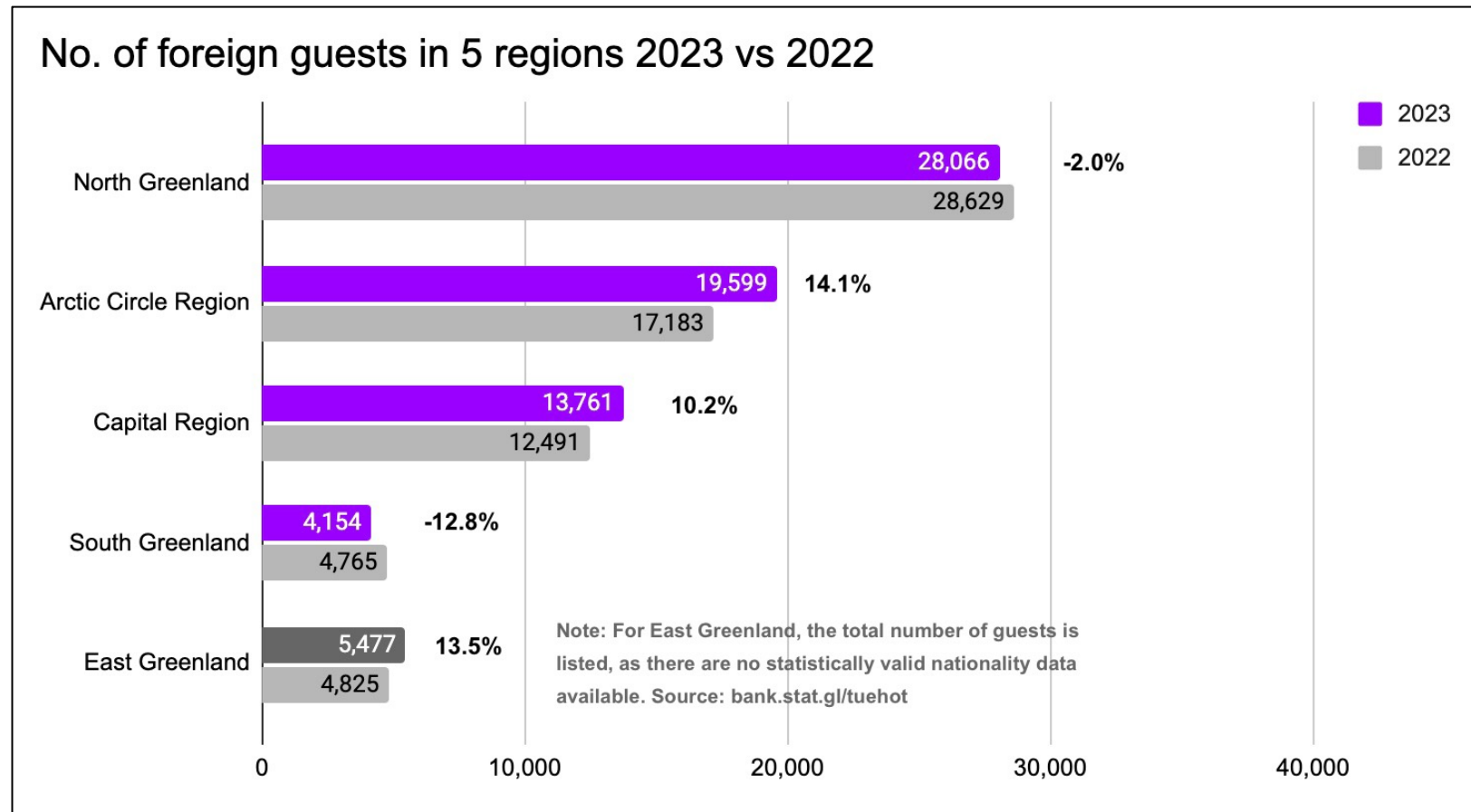


Comparing the Regions: Individual guests 2023 vs 2022



Where page 15 looks at the number of foreign (including DK) overnight stays, we look below at the number of individual guests at the accommodations. A foreign guest purchased an average of about 2.5 overnight stays in 2023.

In the northernmost region, the trend for the number of foreign guests closely follows the number of foreign overnight stays (page 13) with -2.0% vs -2.1%, while there is a larger difference between the two growth rates for the other regions. Especially South Greenland stands out with the number of foreign guests dropping by -12.8% while the number of foreign overnight stays increased by 12.1%.



When there is occasionally a significant discrepancy between the percentage change in the number of guests and the number of overnight stays, it means that there has been a substantial difference in how many overnight stays each guest has purchased on average, from one year to the next in the respective region.

For East Greenland, only the total number of guests has been indicated, and here we can just note a rather nice overall growth of 13.5%, though without specific information on the tourist segments.

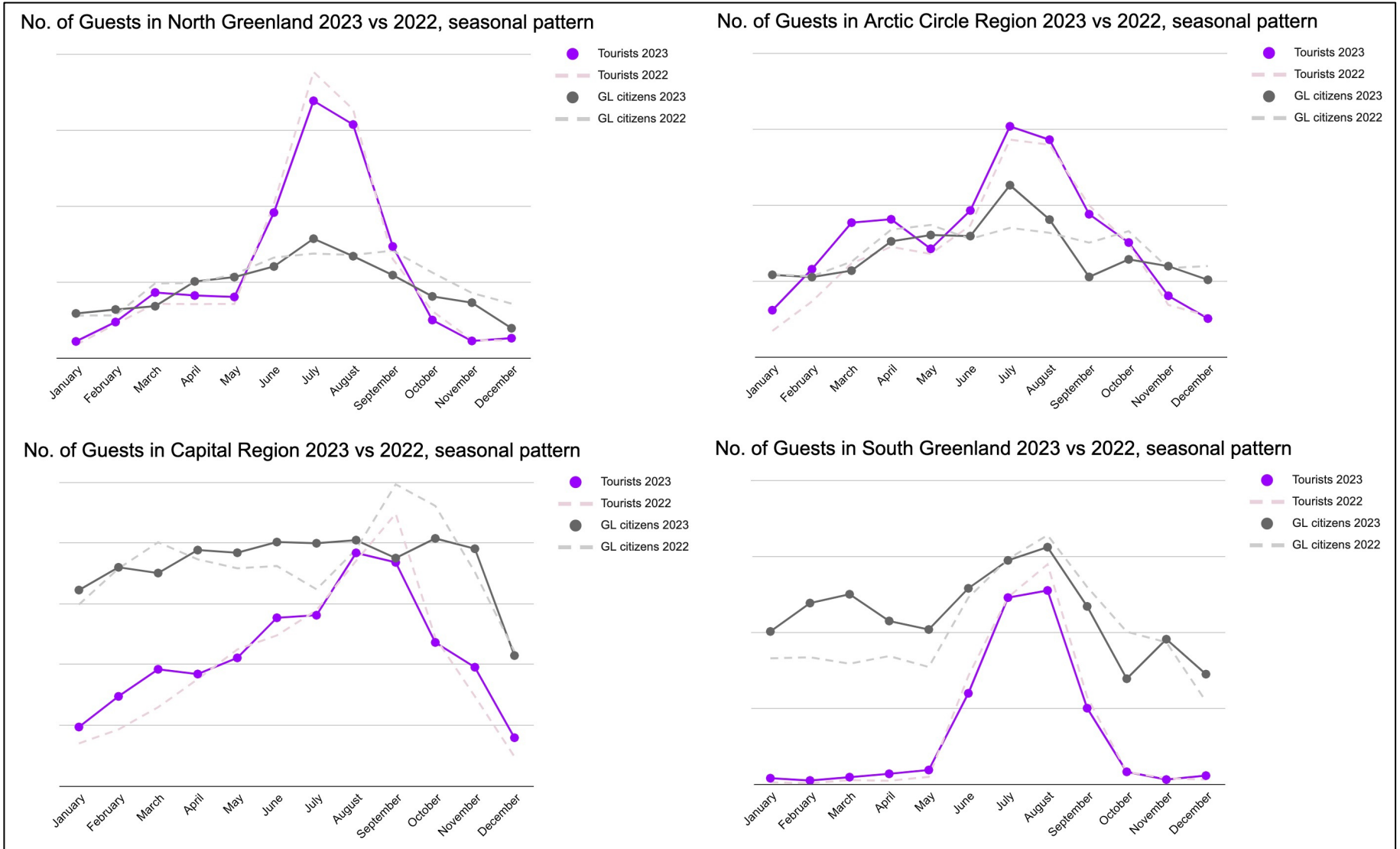
Comparing the Regions: No. of guests, seasonal pattern 2023 vs 2022



By comparing the graphs below (no. of guests in 4 regions over the 12 months of the year) with the graph on page 16 (number of overnight stays in the same 4 regions over 12 months), one can observe a significant overlap - which one would intuitively also expect. However, there are also small discrepancies, especially in Capital Region.

While there is a marked dip in the number of foreign overnight stays in July, there is not the same dip from June to July in the number of foreign guests.

It must be noted that sometimes the two types of overnight stay figures do not completely align, which is due to periodic changes in how many overnight stays each guest purchases on average.

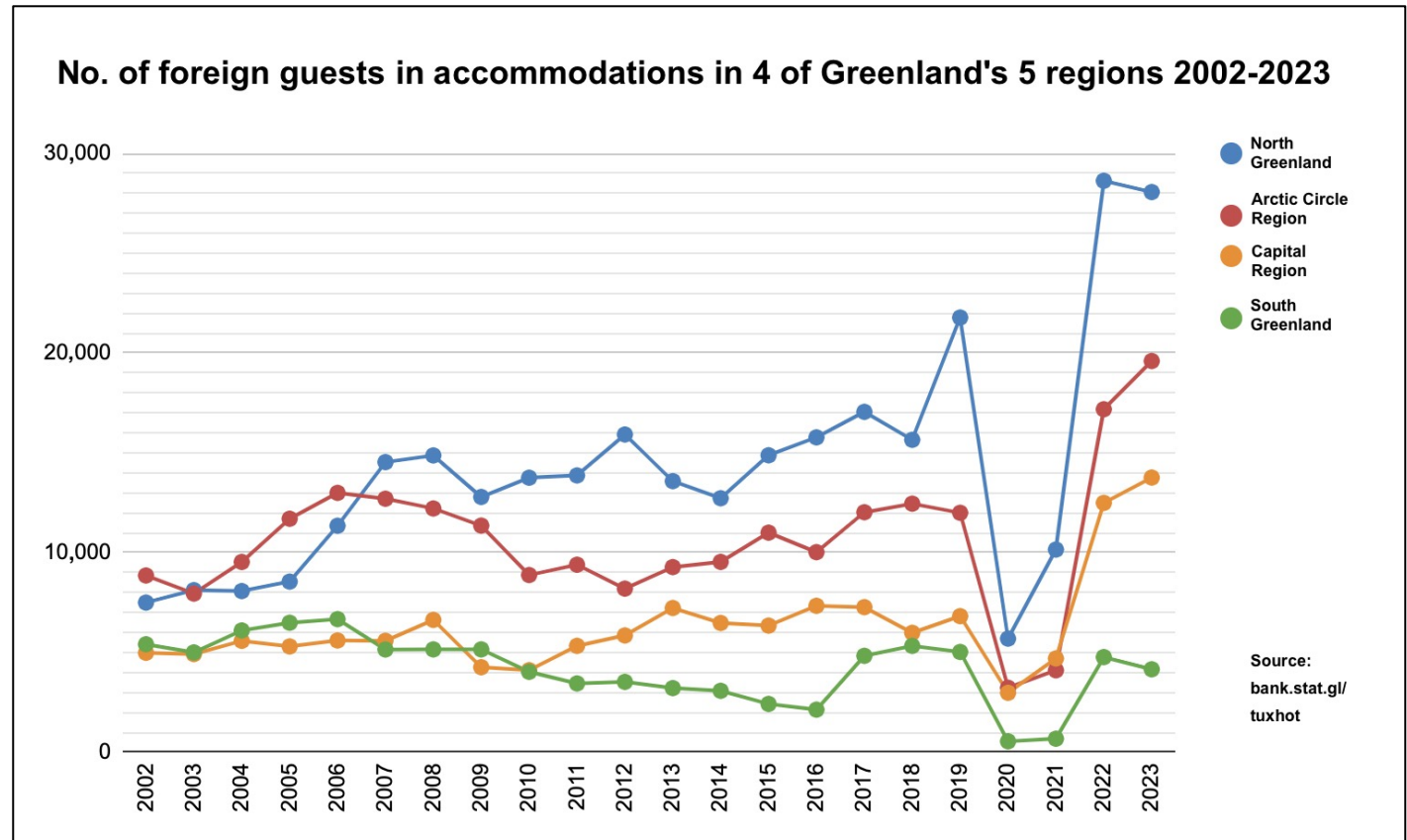


Comparing the Regions: No. of foreign guests (incl. DK) in 4 regions 2002–2023

In the graph to the right, one can follow the development in all regions, except East Greenland (due to lack of data), regarding the number of foreign guests over a long period.

If one completely disregards the two COVID-19 affected years, 2020 and 2021, a clear upward trend is observed in North Greenland, Arctic Circle Region, and Capital Region. South Greenland shows a slight downward trend.

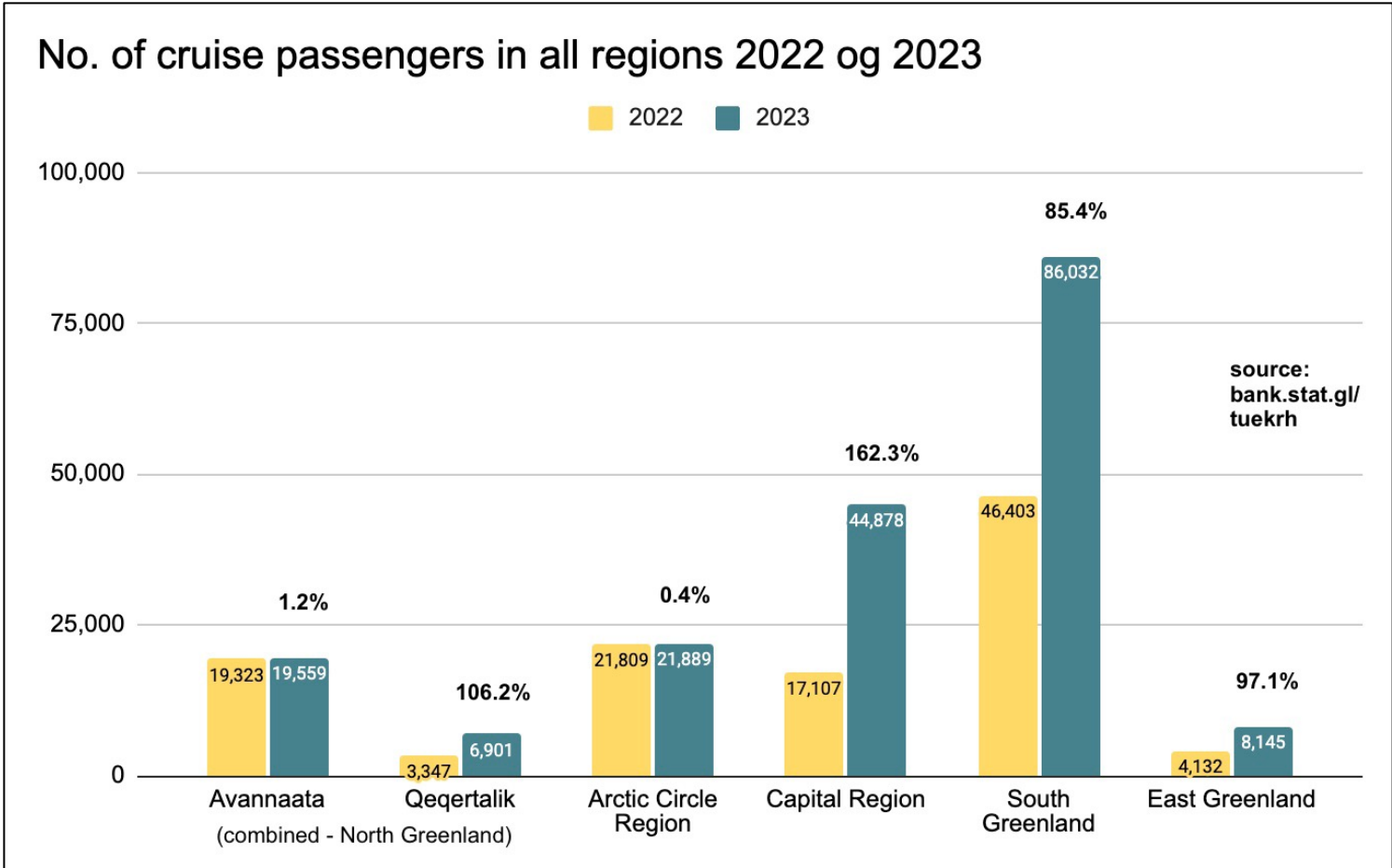
This figure focuses on overnight stay data, but looking at the next page, which deals with the number of cruise passengers who had the opportunity to go ashore in the different regions, it shows a significant growth for the South Greenland in recent years (excluding the COVID-19 years). It is important to consider both land-based tourism and cruise tourism when looking at the picture of tourism development in one's region.



Comparing the regions: No. og cruise passengers by region 2022 and 2023



As mentioned before, there was a significant growth of 73.8% in the number of individual cruise passengers in 2023. There has never been such a strong growth from one year to the next - neither in terms of numerical count nor percentage growth. This growth was driven by the regions Qeqertalik (North Greenland), Capital Region, South Greenland, and East Greenland. It is assumed that at least some of this significant growth is due to so-called 'pent up demand' from the two COVID-19 affected years, 2020 and 2021, when people generally could not travel much, thereby building up some savings that could be spent after the 'reopening'.

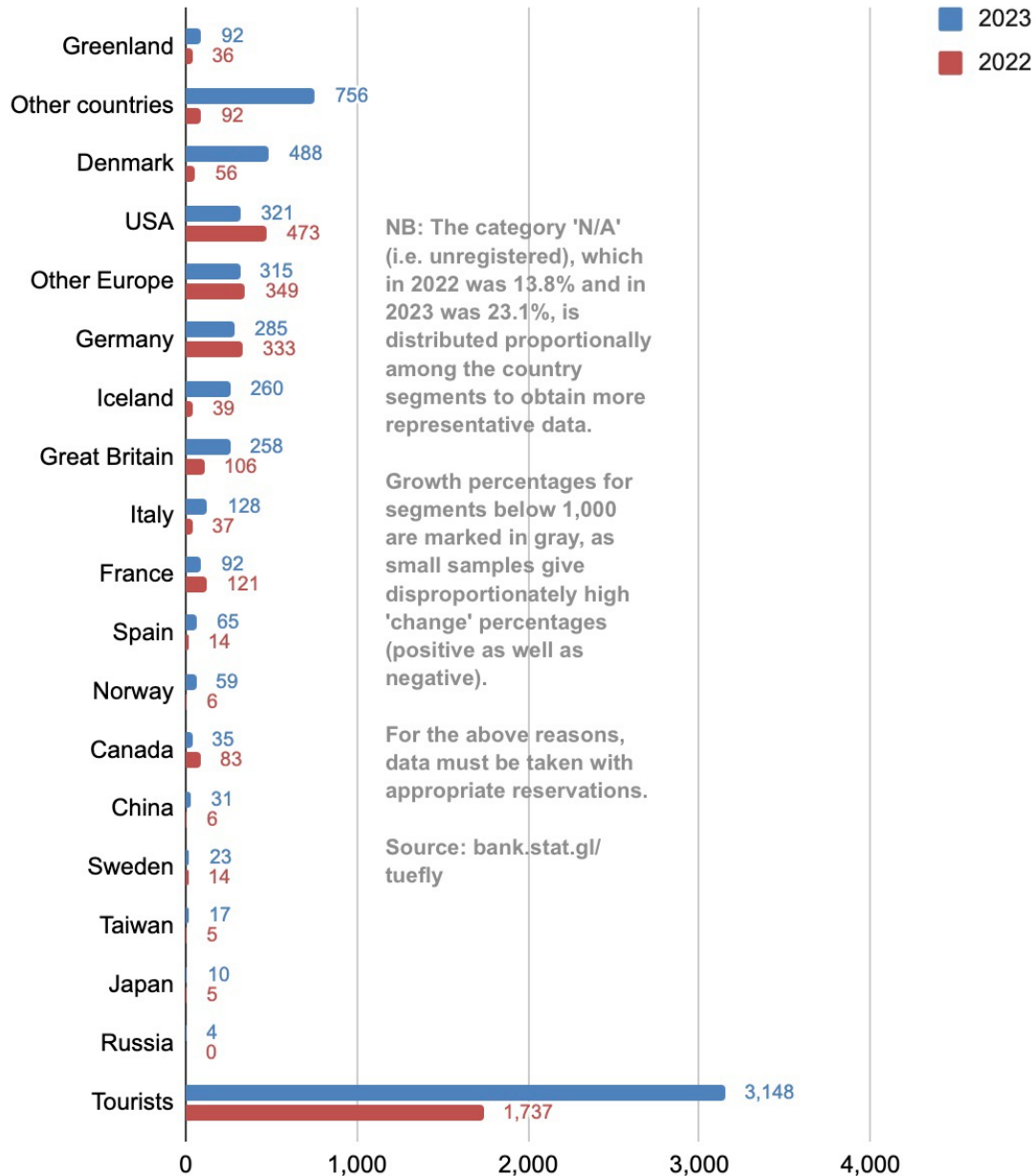


One might think that all this 'pent up demand' would be released in 2022, but what most people in the Western world may not be aware of is that in 2022, many countries around the world still had travel restrictions, including China.

China is actually the only significant source market in this context outside Europe, North America, and Australia, which are otherwise all-dominant.

Refer to page 11 for the distribution among the largest 14 source markets.

No. of air passengers out of Greenland via Ilulissat 2023 vs 2022



North Greenland: Air passengers out of Greenland via Ilulissat 2023 vs 2022



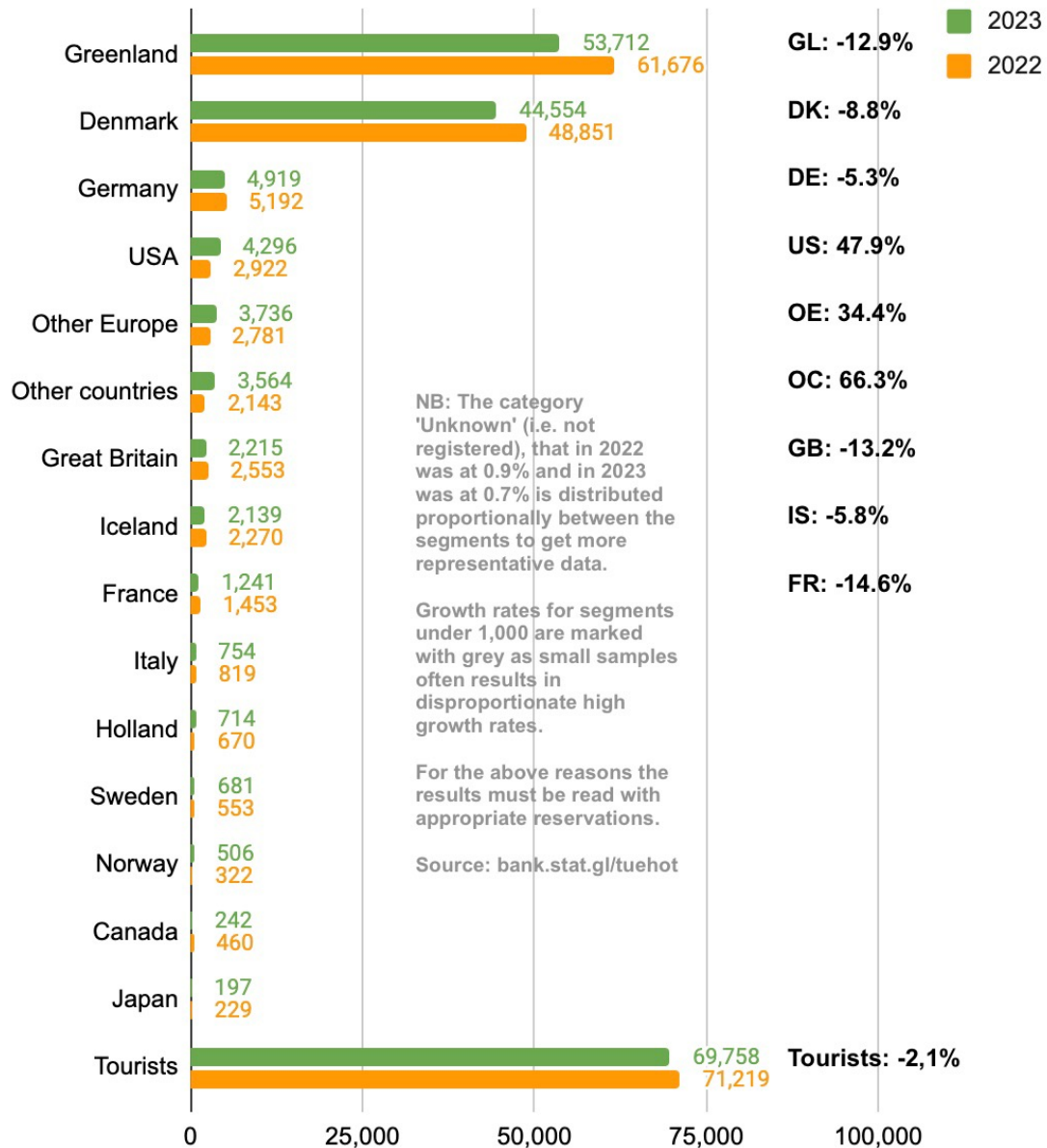
The development in the number of passengers on departures out of Greenland via Ilulissat airport (Ilulissat-Reykjavik) is not very indicative by itself as an indicator of development in North Greenland, as the vast majority still travel out of Greenland from the northern regions via the Kangerlussuaq-Copenhagen connection.

However, it does indicate the demand for Icelandair's route between Reykjavik and Ilulissat, and here we can see a significant growth from 2022 to 2023 of 81.2%.

On page 13, one can compare Ilulissat with the 5 other airports with international departures in terms of the number of foreign passengers. The total number of passengers on departures out of Greenland via Ilulissat corresponds to only 3.1% of the total number of passengers on departures out of Greenland. Kangerlussuaq represents a share of 78.5%.

To get a clear picture of tourism development in North Greenland, it is much more appropriate to look at overnight stay data and cruise data.

No. of overnight stays in North Greenland 2023 vs 2022



North Greenland: No. of overnight stays 2023 vs 2022

On a national level, the change/growth in the number of foreign overnight stays from 2022 to 2023 was 1.3%.

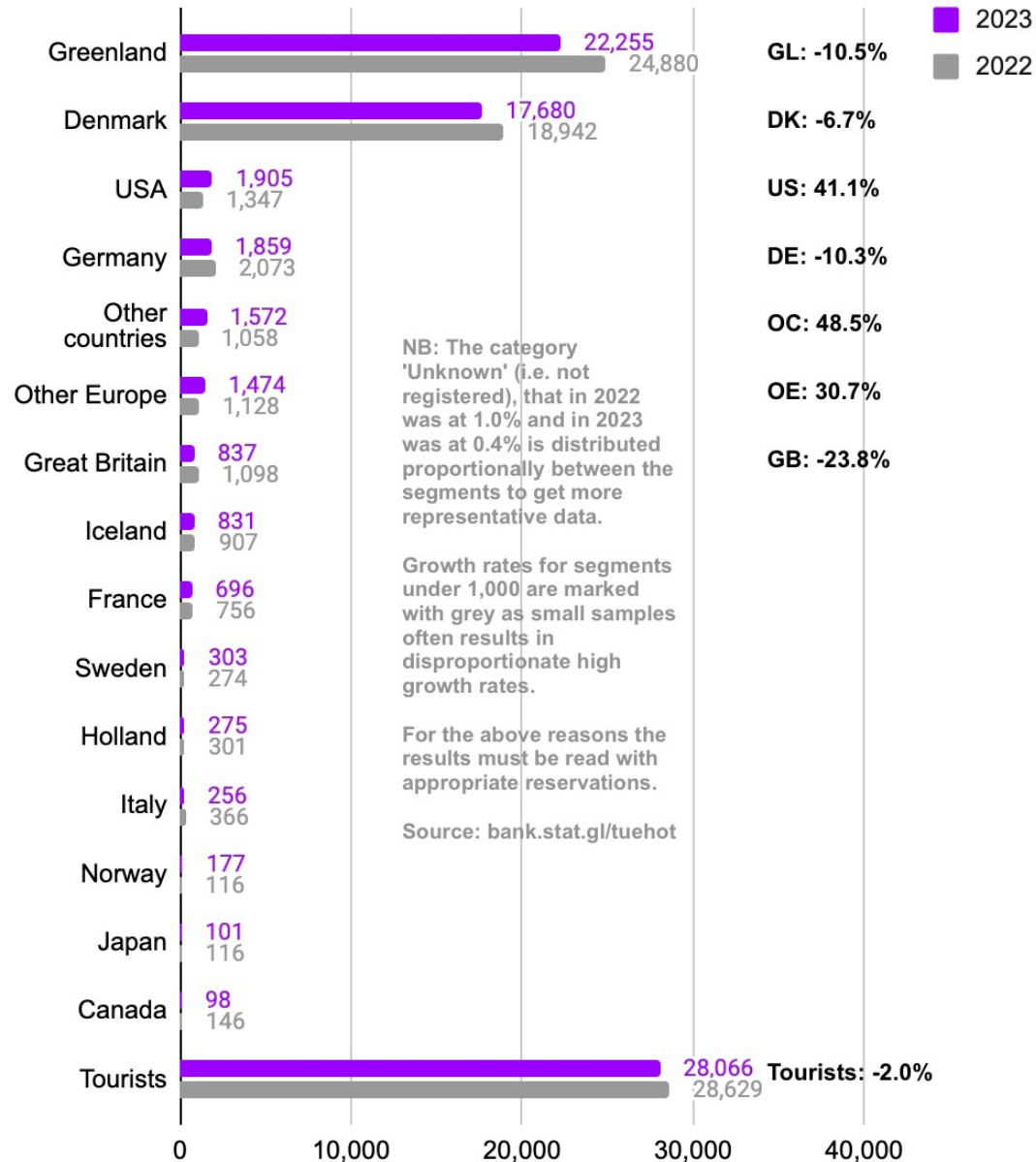
A decrease of -2.1% in North Greenland is fundamentally such a small change in absolute numbers (1,461 foreign overnight stays) that it must be considered more or less as status quo.

While the USA, Other Europe, and Other Countries showed increases, Denmark, Germany, the United Kingdom, Iceland, and France declined.

On page 15, it can be seen that North Greenland, when their data are combined, have the largest share of overnight stays.

Digging deeper, because there is a data series for Ilulissat in isolation, it is clear that Ilulissat constitutes Greenland's most popular tourist destination.

No. of guests in North Greenland 2023 vs 2022



North Greenland: No. of guests 2023 vs 2022

Greenland Statistics collects data on both the number of overnight stays and the number of individual guests. The primary reason is that by comparing the two figures, one arrives at the average number of overnight stays each guest has purchased in the given period.

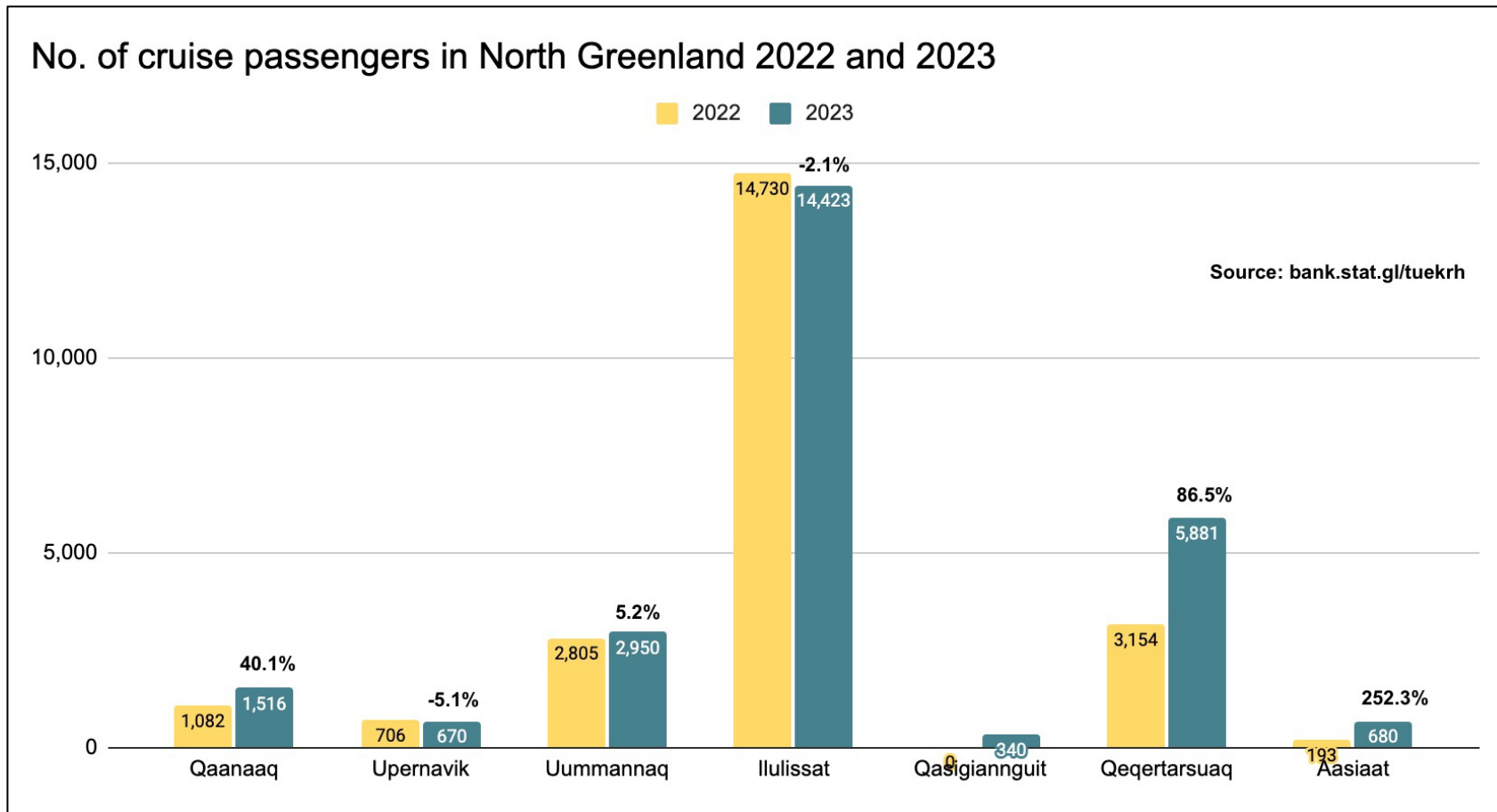
Nationally, each foreign guest purchased an average of 2.5 overnight stays at each accommodation they checked into. Greenland Statistics cannot track each individual guest from one accommodation to another. However, Visit Greenland's studies show that tourists visit an average of 3 destinations while in Greenland. See [this report](#), p. 19.

In 2023, each foreign guest in North Greenland purchased an average of 2.5 overnight stays at each accommodation they checked into.

North Greenland: No. of cruise passengers 2022 and 2023

While there was a significant national growth of 73.8% in the number of individual cruise passengers, the growth in North Greenland was closer to status quo, with total growth at 2.1%, corresponding to a difference of only 236 passengers from 2022 to 2023.

The largest growth in absolute numbers was in Qeqertarsuaq where there were 2,727 more cruise passengers in 2023, corresponding to a growth of 86.5%.

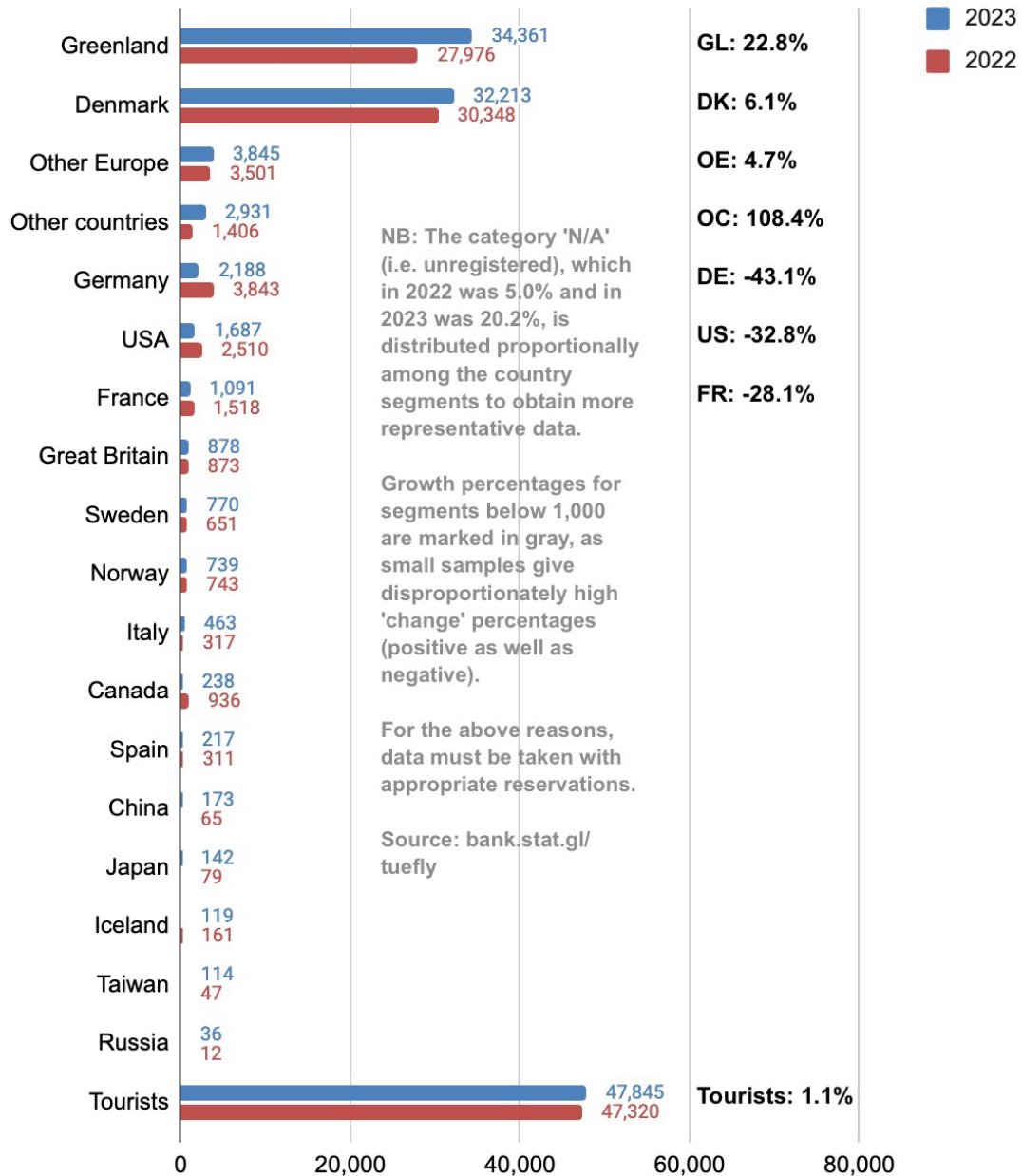


Of course, there is a significant difference in the spending habits of land-based tourists compared to cruise tourists.

Land-based tourists generally purchase many flight tickets from the national airline (both international and domestic departures), pay airport fees, book accommodations, dine out, and buy goods in supermarkets, etc.

Cruise tourists spend most of their money 'on the ships' as they cover transportation, except for air-based changes in Kangerlussuaq (which about 1/8 of cruise passengers do according to aac.gl), accommodations, dining, and many of the tours. However, there is still significant income for those actors who provide services and tours to cruise tourists.

No. of air passengers out of Greenland via Kangerlussuaq 2023 vs 2022



Arctic Circle Region: Air passengers out of Greenland via Kangerlussuaq 2023 vs 2022

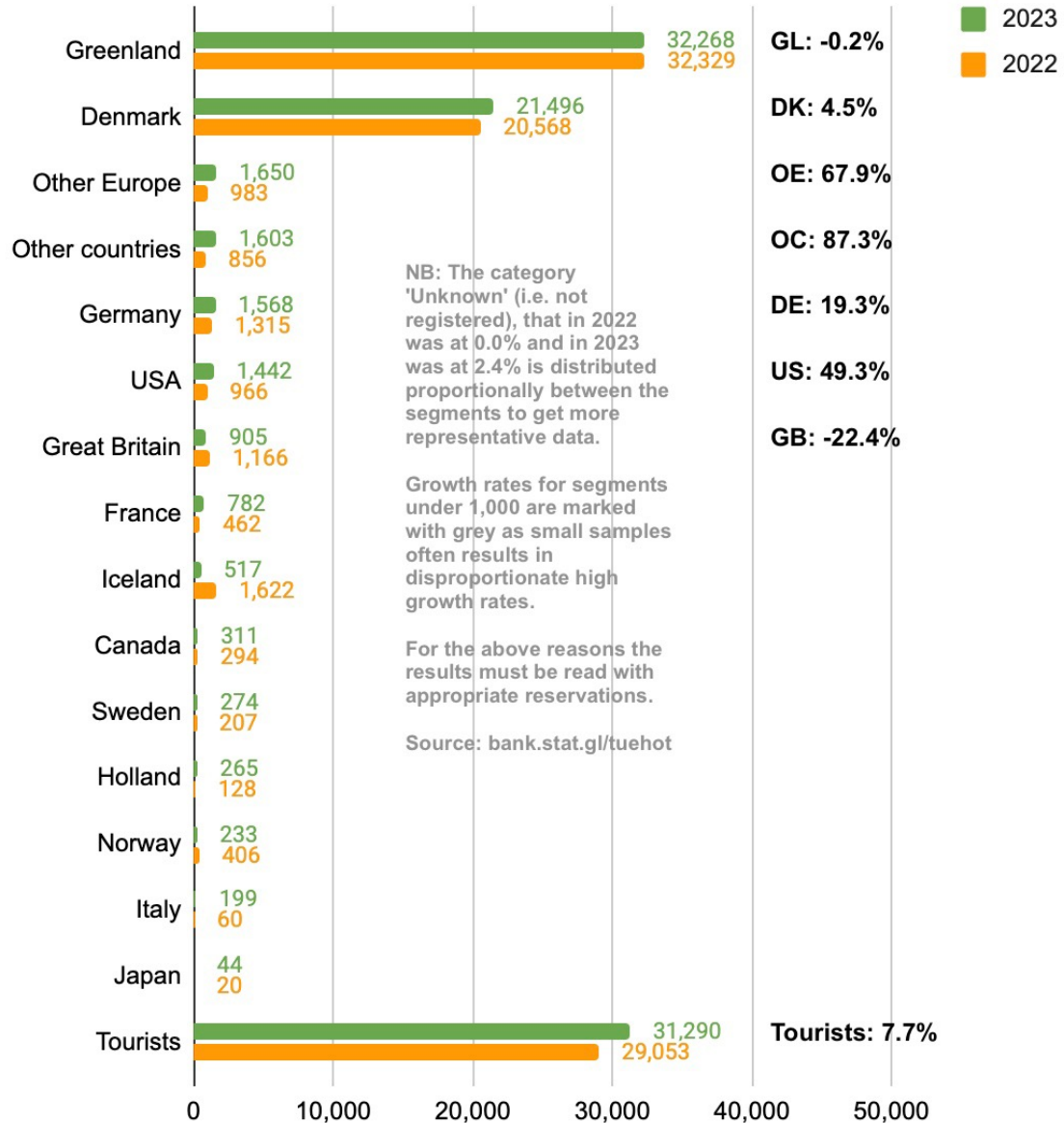
Kangerlussuaq accounted for 78.5% of the total number of passengers on international departures out of Greenland in 2023. This is due to the fact that Kangerlussuaq acts as the primary hub for air traffic in and out of West and North Greenland - also for many tourists traveling to and from regions other than Arctic Circle Region.

For this reason, the number of foreign passengers on international departures from Kangerlussuaq cannot be seen as an indicator for development in Arctic Circle Region, but more as an indicator for the development of land-based tourism in West and North Greenland. Of course, data from both Ilulissat and Nuuk airports (departures to Iceland) should be added to give a complete picture of the development in West and North Greenland.

At the same time, it should be noted that even if a tourist's primary destination is in West or North Greenland, this tourist may also have made a combination trip, with destinations in South Greenland (if we are talking about the summer high season), as most tourists on average visit 3 destinations on their trip.

It is very rare for tourists to combine West and North Greenland with East Greenland, as the air infrastructure makes this difficult. Most land-based tourists in East Greenland fly directly between East Greenland and Iceland with Icelandair (Reykjavik-Kulusuk) and/or Norlandair (Akureyri-Constable Point).

No. of overnight stays in Arctic Circle Region 2023 vs 2022



Arctic Circle Region: No. of overnight stays 2023 vs 2022

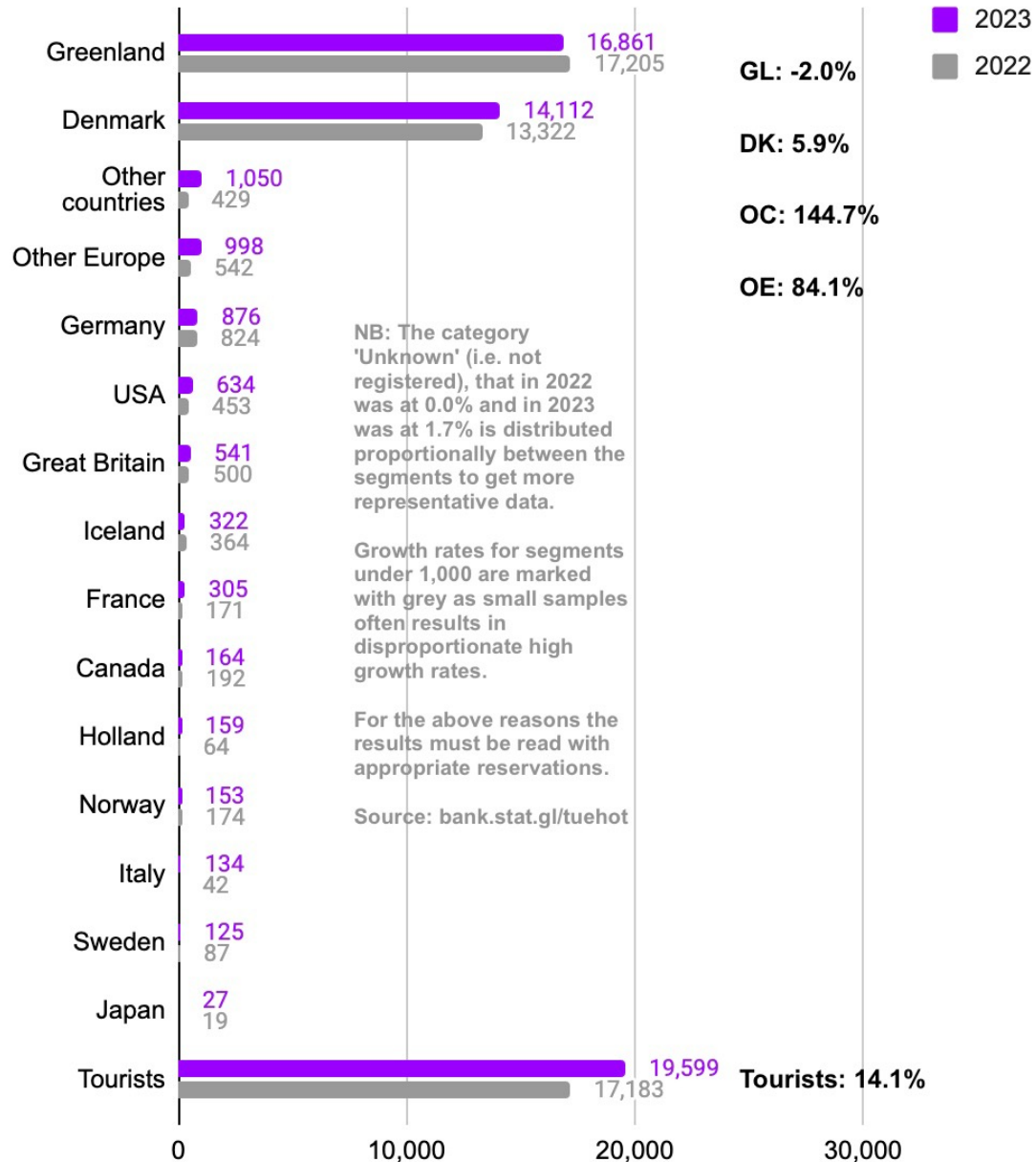
Arctic Circle Region had a good season in 2023 with a 7.7% increase in the number of foreign overnight stays.

There was particularly high growth in the segments 'Other Europe', 'Other Countries', Germany, and the USA.

The Great Britain segment fell by -22.4%, corresponding to 261 fewer overnight stays.

There were 1,105 fewer overnight stays for the Iceland segment, corresponding to a percentage decrease of -68.1%. This may be due to a construction project with many Icelandic workers stopping in 2023.

No. of guests in Arctic Circle Region 2023 vs 2022



Arctic Circle Region: No. of guests 2023 vs 2022

A 14.1% increase in the number of foreign guests compared to a growth in the number of foreign overnight stays of 7.1% indicates that guests in Arctic Circle Region in 2023 purchased fewer overnight stays than in 2022.

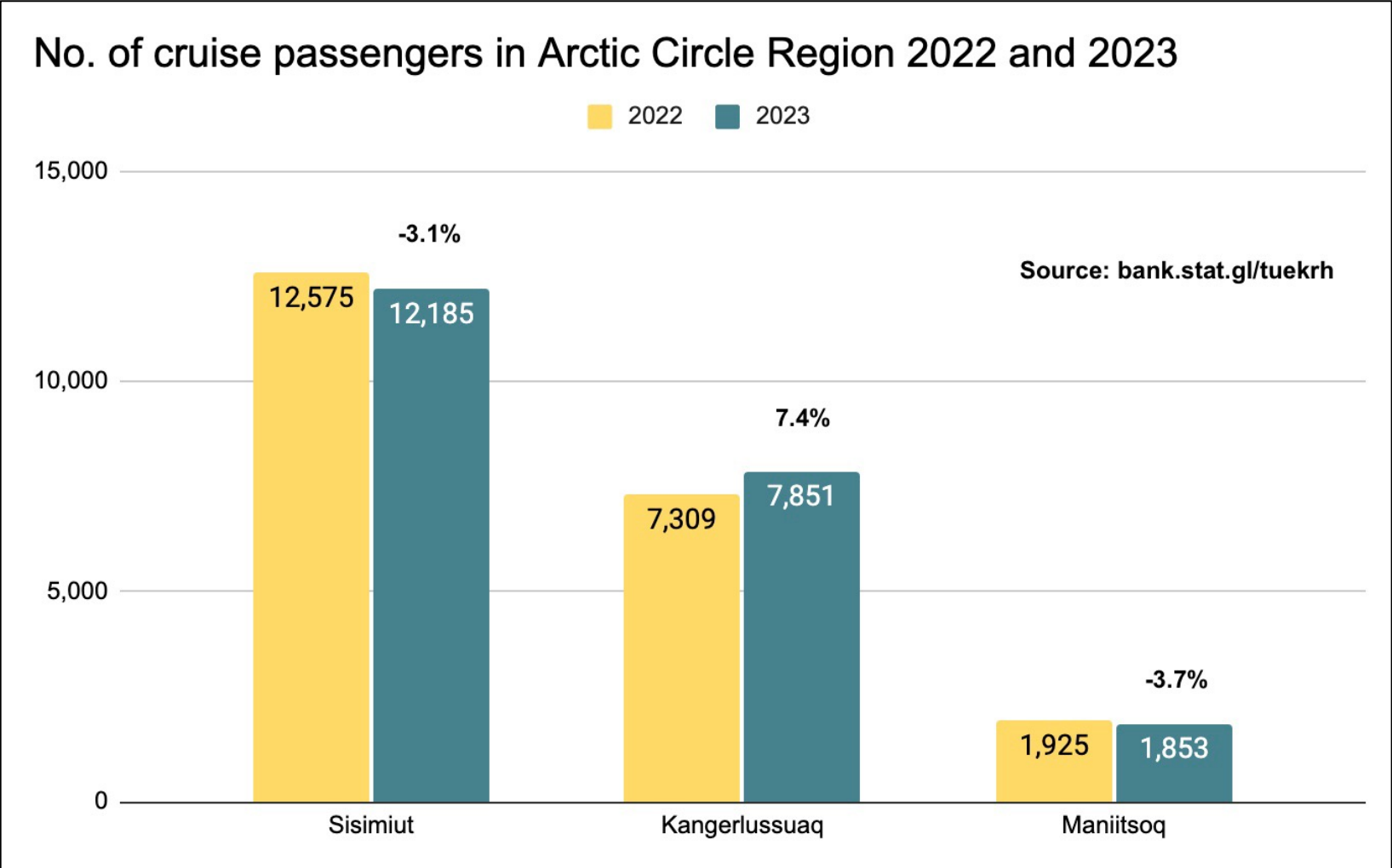
In 2022, foreign guests purchased an average of 1.7 overnight stays in Arctic Circle Region. In 2023, this was reduced to an average of 1.6 overnight stays. This shows that even a change of 0.1 percentage points in the average number of overnight stays purchased per guest can result in a difference of 7 percentage points when comparing changes in the number of overnight stays and the number of guests - from 2022 to 2023.

Arctic Circle Region: No. of cruise passengers 2022 and 2023



On page 20, it can be seen that the change from 2022 to 2023 in the number of cruise passengers was 0.4%, which must be designated as status quo.

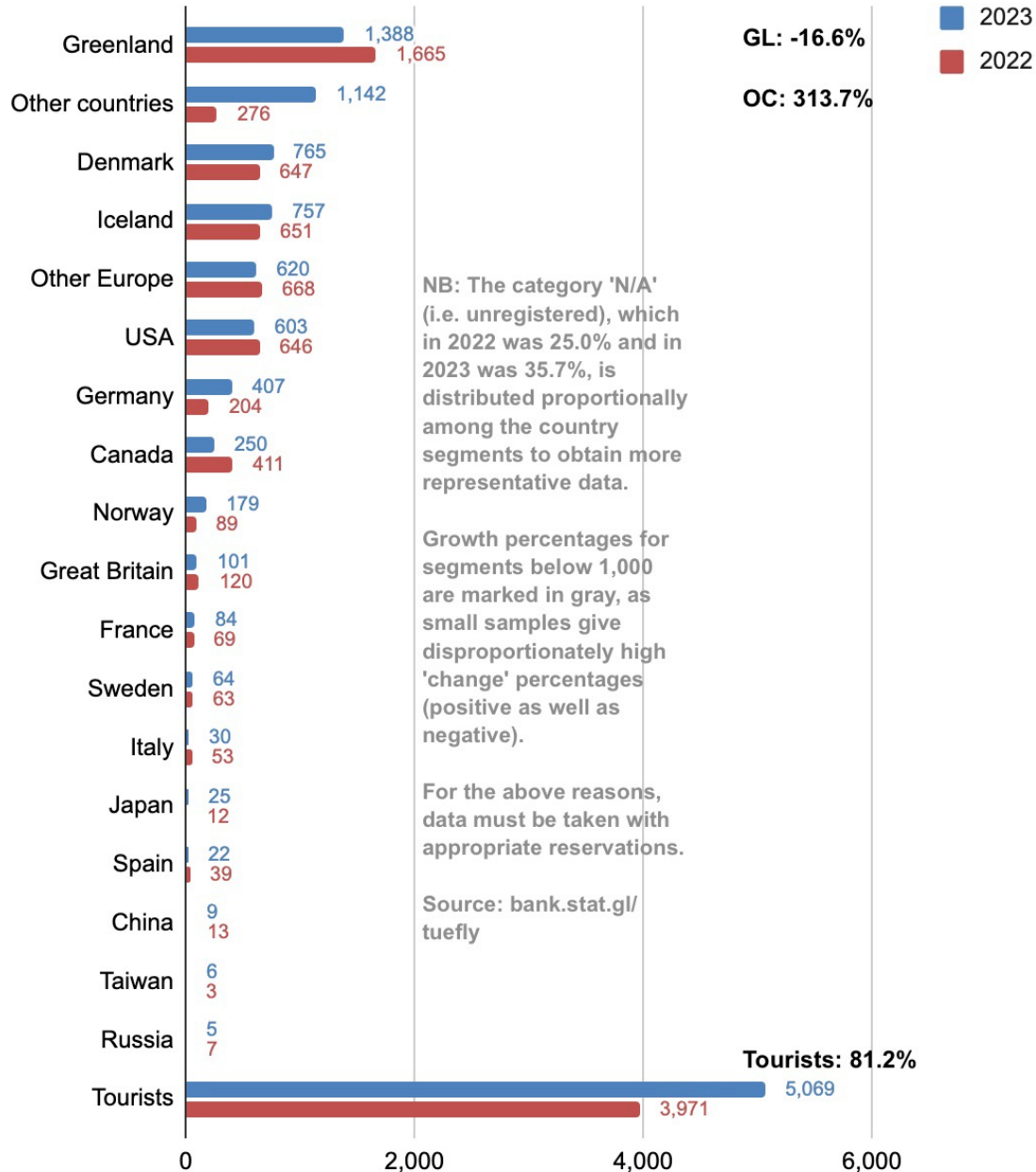
Although there was a national growth of 73.8% in 2023, there were 3.1% fewer cruise passengers in Sisimiut, which seems illogical at first glance.



Polaroil operates fueling stations for cruise ships in both Sisimiut and Nuuk. They report that before the 2022 season, they completed a harbor expansion that made it easier for large cruise ships to refuel, which helped increase the number of cruise ships docking in Sisimiut for refueling in 2022.

Polaroil believes that the 'missing' growth in Sisimiut in 2023 is because that growth already occurred in 2022, partly due to the harbor expansion and the modernized refueling station that was ready in 2022.

No. of air passengers out of Greenland via Nuuk 2023 vs 2022



Capital Region: Air passengers out of Greenland via Nuuk 2023 vs 2022

In 2023, there was a record growth (81.2%) in the number of foreign air passengers on international departures from Nuuk airport.

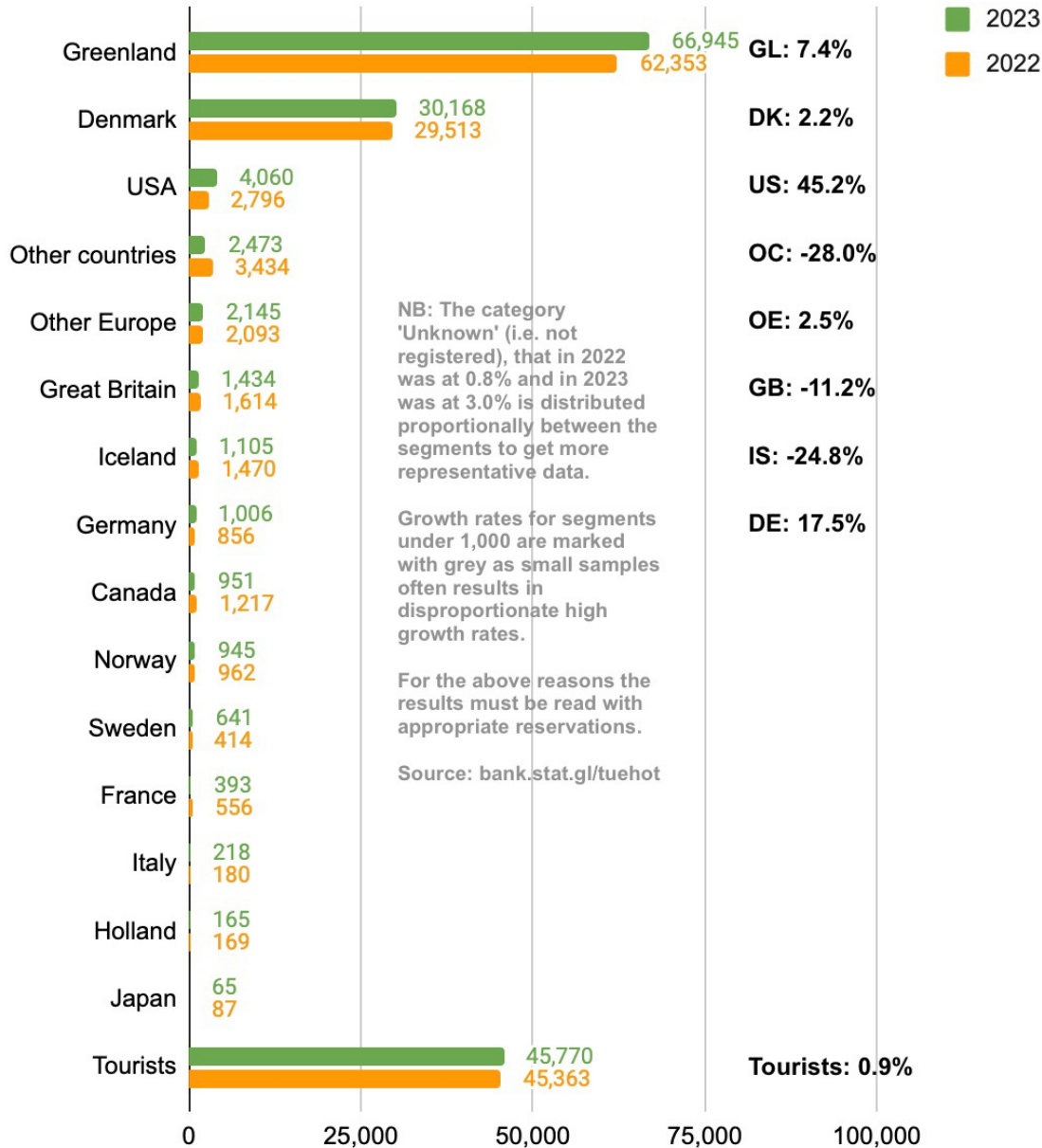
'Other Countries' had the largest growth segment with 313.7% (equivalent to 866 passengers).

In 2022, only 75.0% of air passengers had their country of residence registered, and in 2023, only 64.3% of passengers were registered. Therefore, the growth percentages should be taken with appropriate caution.

On page 13, a comparison of the number of foreign air passengers on international departures from Ilulissat, Kangerlussuaq, Nuuk, Narsarsuaq, Kulusuk, and Constable Point can be seen. The number of foreign air passengers from Nuuk corresponds to 7.7% of the total number of foreign passengers on international departures in 2023.

Travel patterns will change significantly from November 28, 2024, when Nuuk's transatlantic airport opens.

No. of overnight stays in Capital Region 2023 vs 2022



Capital Region: No. of overnight stays 2023 vs 2022

2023 was a status quo year for Capital Region in terms of the number of foreign overnight stays, with a growth of 0.9%.

There was a relatively strong growth in the USA segment (45.2%) and a relatively large reduction in the Other Countries segment (-28.0%).

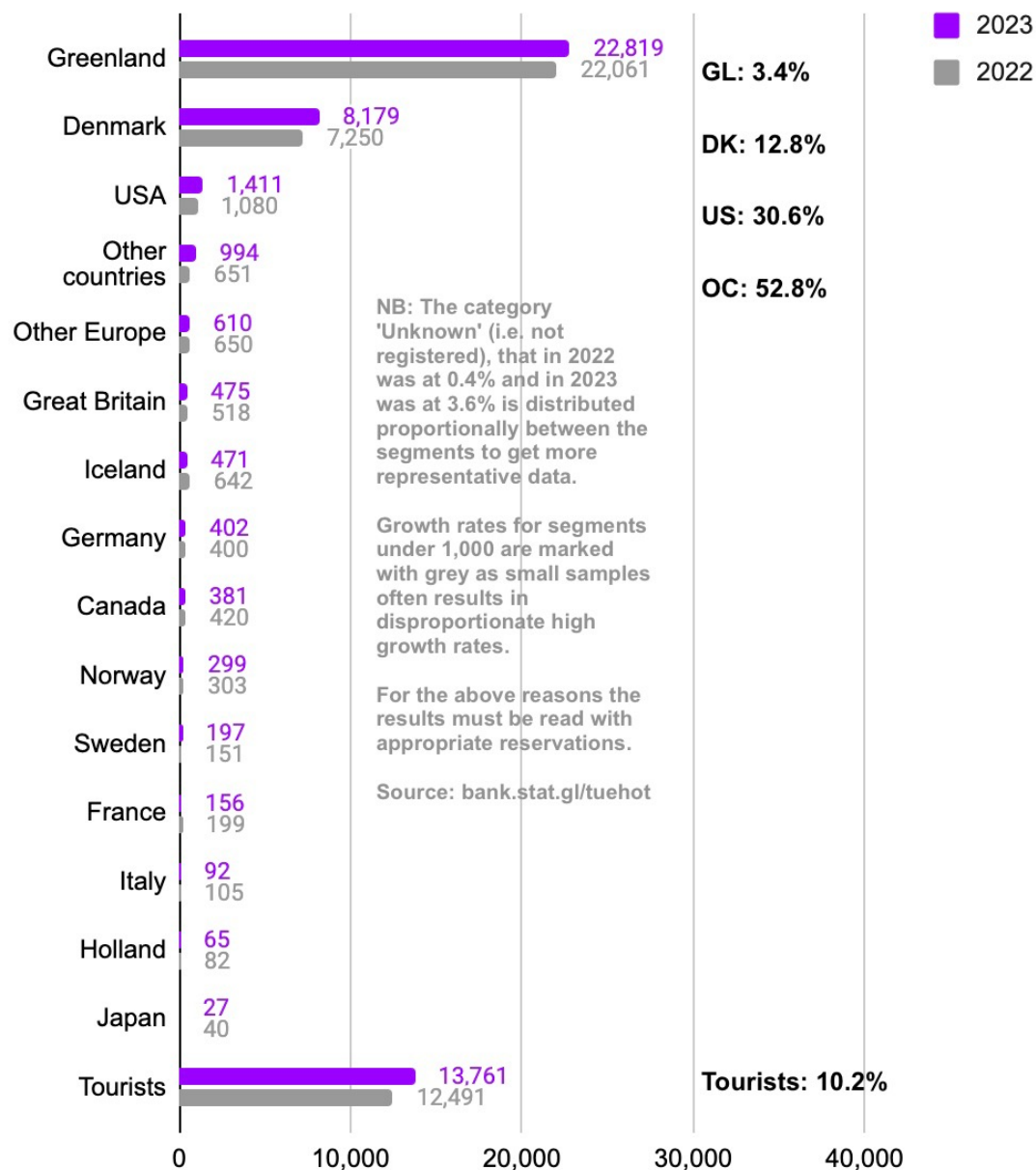
While some of the other segments also saw larger percentage shifts, in absolute numbers, the fluctuations were not very significant.

On page 16, the comparison between 4 out of 5 regions regarding the number of overnight stays (GL citizens vs. tourists) shows that the number of overnight stays for GL citizens is higher than for tourists throughout the 12 months of the year - both in 2022 and 2023. It was only in South Greenland in 2022 that GL citizens were higher in all 12 months.

It can be said that the two regions are characterized by being dominated by local citizens at accommodation sites, where tourists at least in the summer months in the other regions outnumber GL citizens.

In Nuuk, this has a lot to do with it being the administrative and educational capital, and a center for many courses, conferences, and meetings within both the private and public sectors.

No. of guests in Capital Region 2023 vs 2022



Capital Region: No. of guests 2023 vs 2022

Although there was only a growth of 0.9% in the number of foreign overnight stays in 2023, there was a growth of 10.2% in the number of foreign guests the same year.

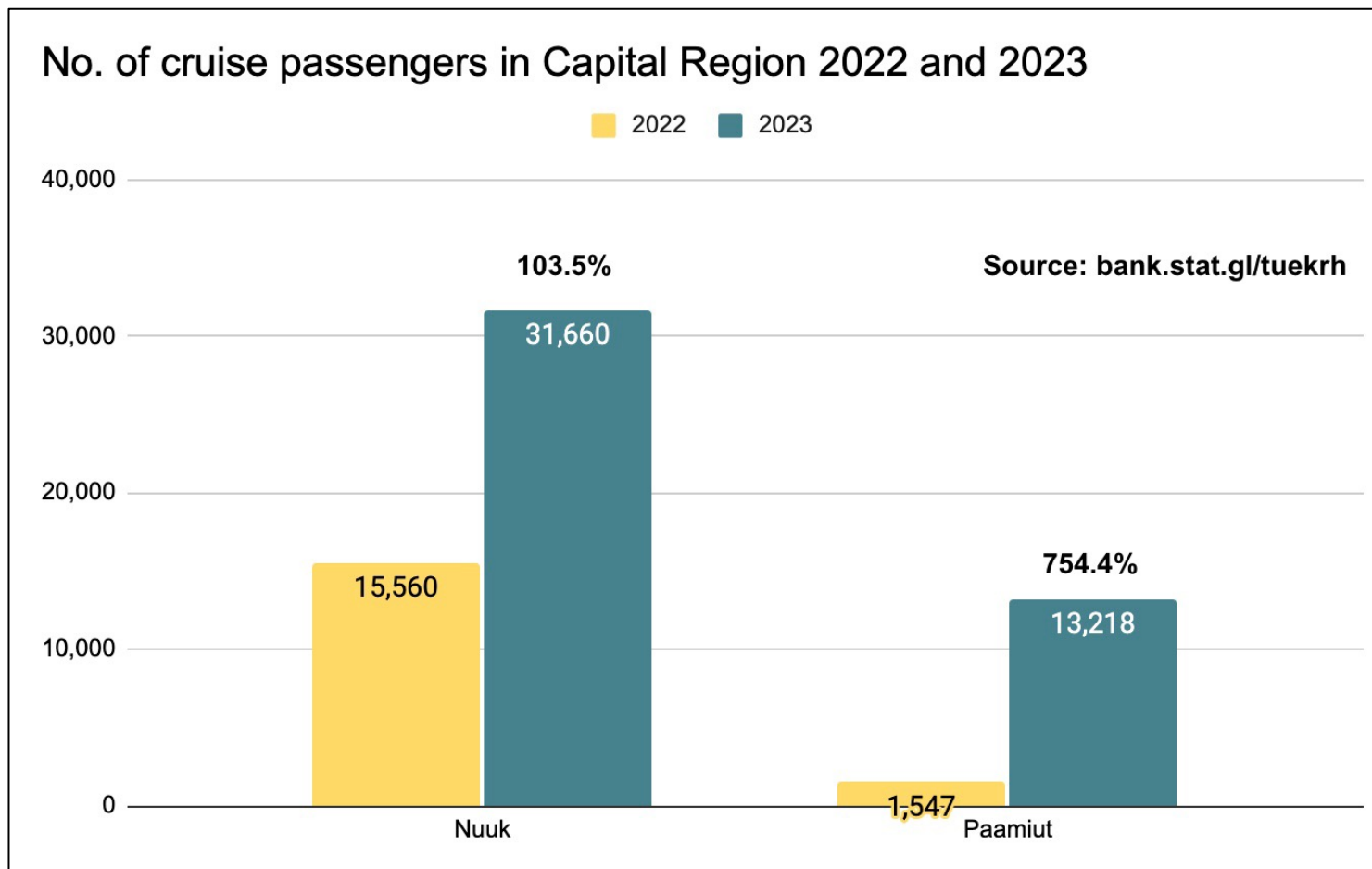
This is partly due to the average number of overnight stays for foreign guests being 3.6 in 2022, which was reduced to 3.3 in 2023.

Thus, there are various reasons for fluctuations from year to year concerning the average number of overnight stays purchased per guest.

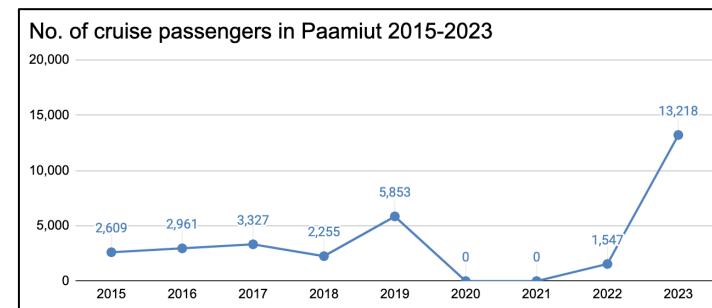
All three of the largest foreign segments, Denmark, the USA, and Other Countries, represented double-digit growth percentages.

Capital Region: No. of cruise passengers 2022 and 2023

In 2023, Capital Region was one of the regions that experienced a dramatic increase in the number of cruise guests on ships docking in the region. Never before on a national level has there been a growth of 73.8%.

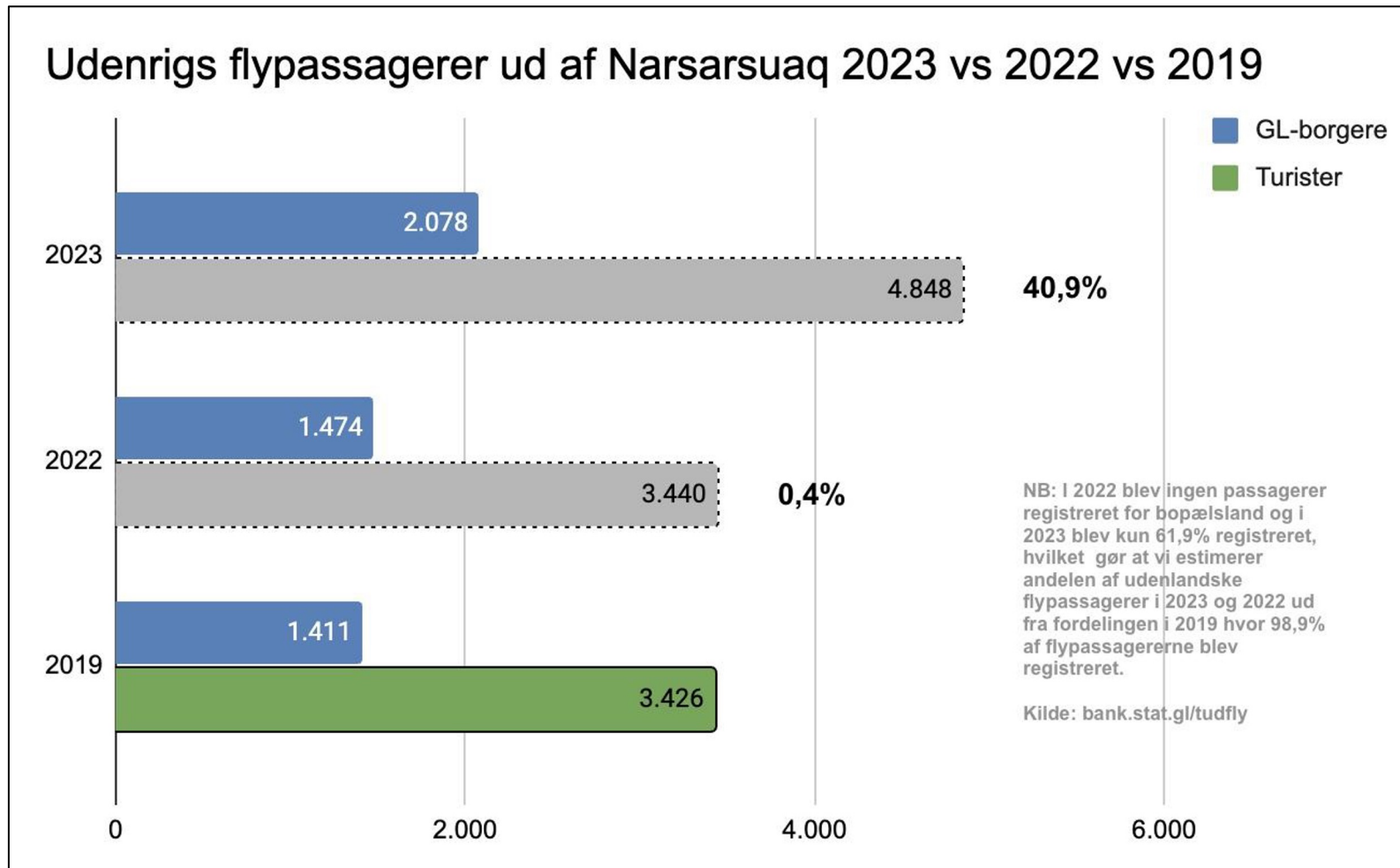


The growth in Paamiut looks quite dramatic in this graphical representation, with a growth of 754.4%. When viewed in a broader historical context (the graph at the bottom right) and looking at the overall development from 2015 to 2023 (excluding the Covid-19 years 2020 and 2021), the growth from 2019 to 2023 is not as dramatic, though still quite significant.



South Greenland: Foreign air passengers out of Greenland via Narsarsuaq 2023 vs 2022 vs 2019

There have been incomplete registrations of the country of residence for air passengers on international departures from Narsarsuaq in 2020, 2021, and 2023. Therefore, we have chosen to visualize a rough estimate of the number of foreign air passengers in 2023, 2022 and 2019 in the graph below.



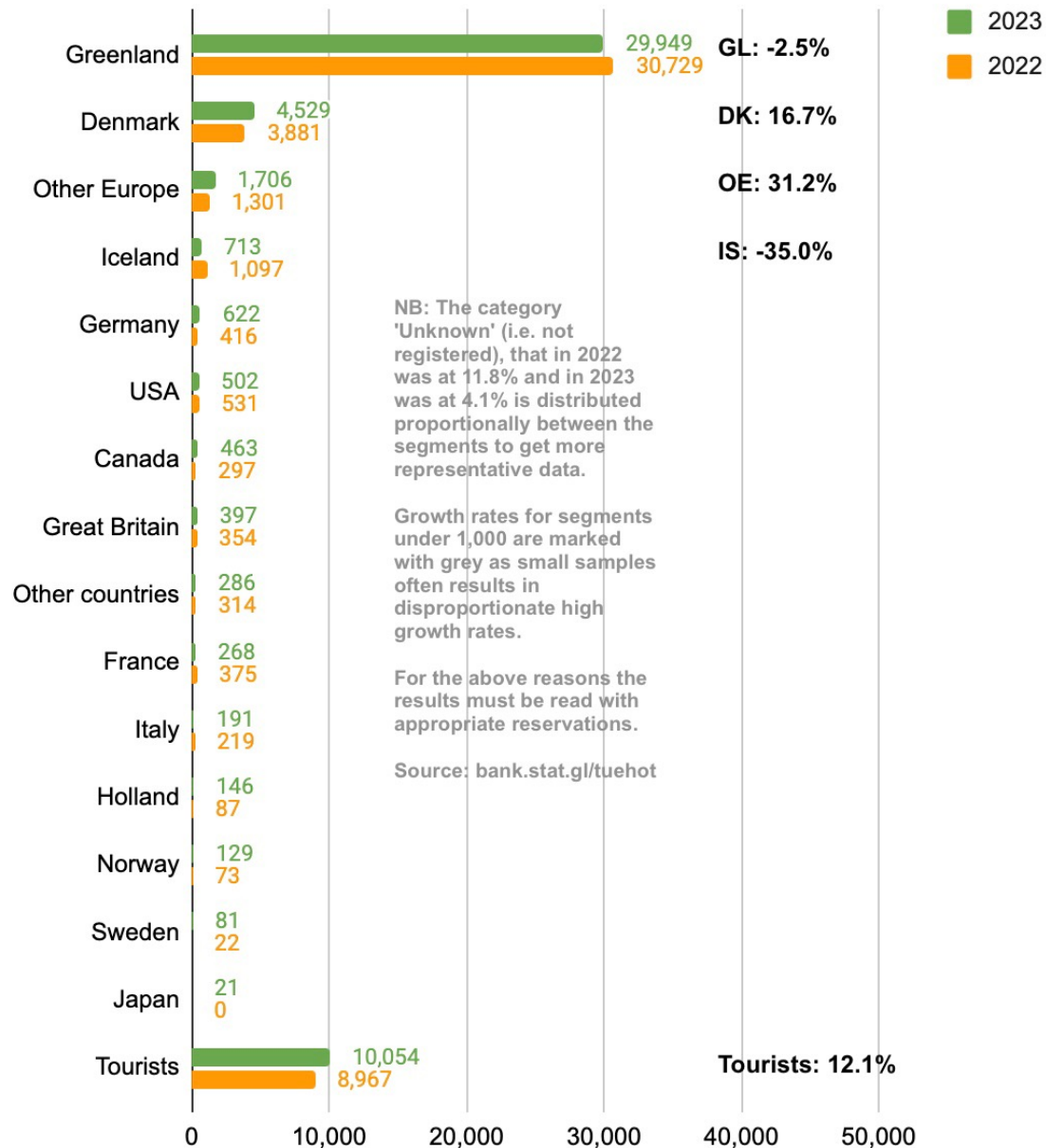
In 2019, when there was almost complete registration, the proportion of tourists was around 70%. This is the same distribution we have used for 2022 and 2023, as Mittarfeqarfiit always provides the total number of air passengers to Greenland Statistics.

If our hypothesis that tourists made up 70% is correct, this corresponds to a growth of 40.9% in 2023.

According to Kalaallit Airports (kair.gl), it is still planned that the new 1,500 m airport in Qaqortoq will open in the autumn of 2025.

The 1,500 m long runway is too short for transatlantic routes, so tourists are primarily expected to come from Nuuk and Reykjavik.

No. of overnight stays in South Greenland 2023 vs 2022



South Greenland: No. of overnight stays 2023 vs 2022

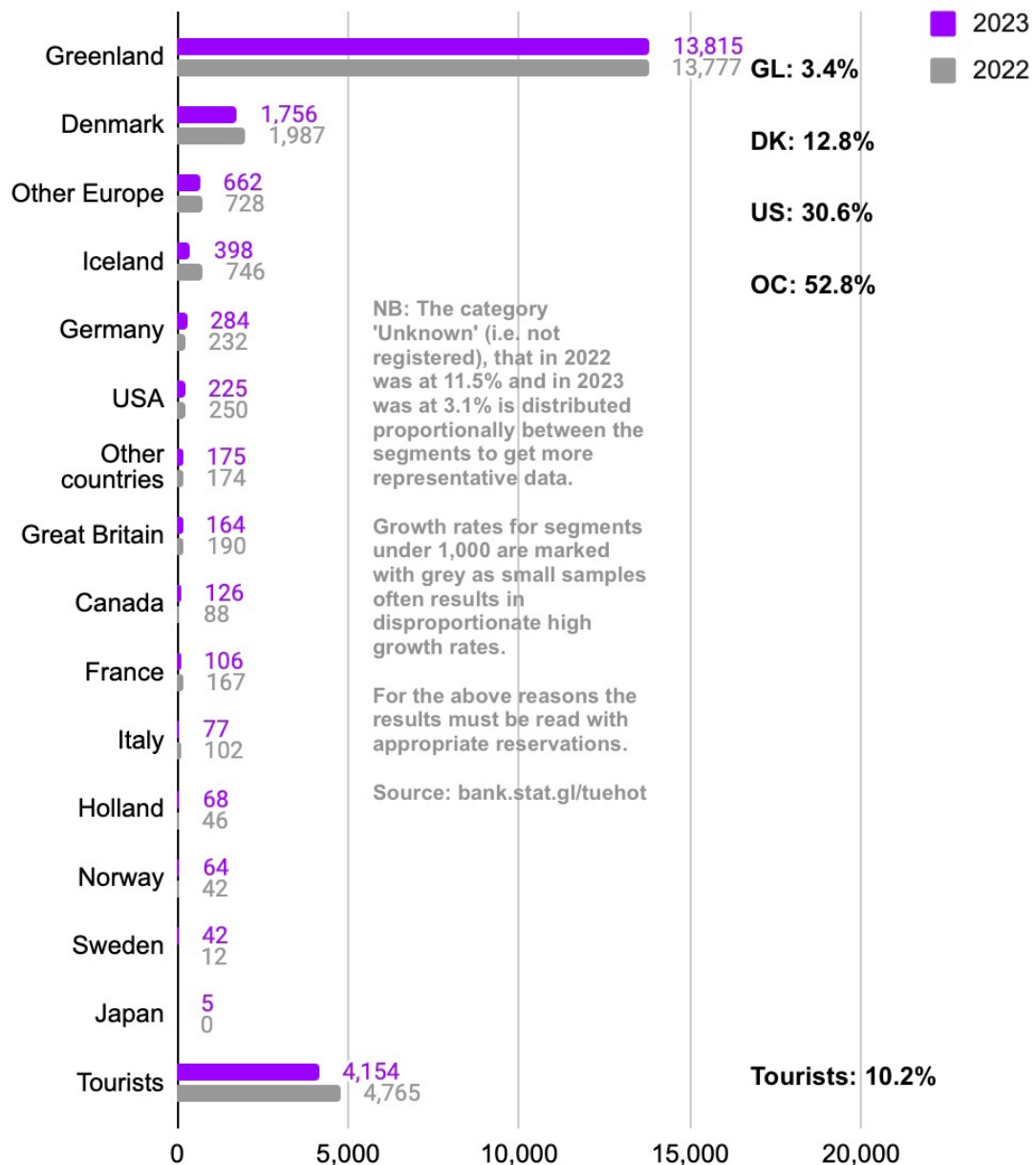
2023 was a good year for accommodations in South Greenland in terms of the number of foreign overnight stays, with a growth of 12.1%.

The growth primarily came from the segments Denmark, Other Europe, Germany, Canada, and the Great Britain, while there was a decline for the segments Iceland, USA, Other Countries, France, and Italy.

On page 16, you can see the seasonal pattern for South Greenland, and the region has the most pronounced seasonal tendency in Greenland, meaning that the summer months overwhelmingly dominate when tourists visit the area.

It is also the region in Greenland where foreign guests constitute the smallest proportion relative to local guests, with a market share of only 25.7% in 2022 and 23.1% in 2023.

No. of guests in South Greenland 2023 vs 2022



South Greenland: No. of guests 2023 vs 2022

As we have seen in other cases, there can be positive growth in terms of the number of overnight stays but negative growth in terms of the number of guests - or vice versa - which is also the case in South Greenland.

This is because the average number of overnight stays per foreign guest in 2022 was 1.9 and rose to 2.4 in 2023. Even minor shifts in the average number of overnight stays per guest can lead to significant differences between the percentage growth (positive or negative) for both the number of overnight stays and the number of guests.

This also means that there can be a situation where accommodations in a region have had a good tourist season because each guest has purchased significantly more overnight stays per guest than the year before, but there has been a decline in the number of individual guests, corresponding to most of the land-based tourists.

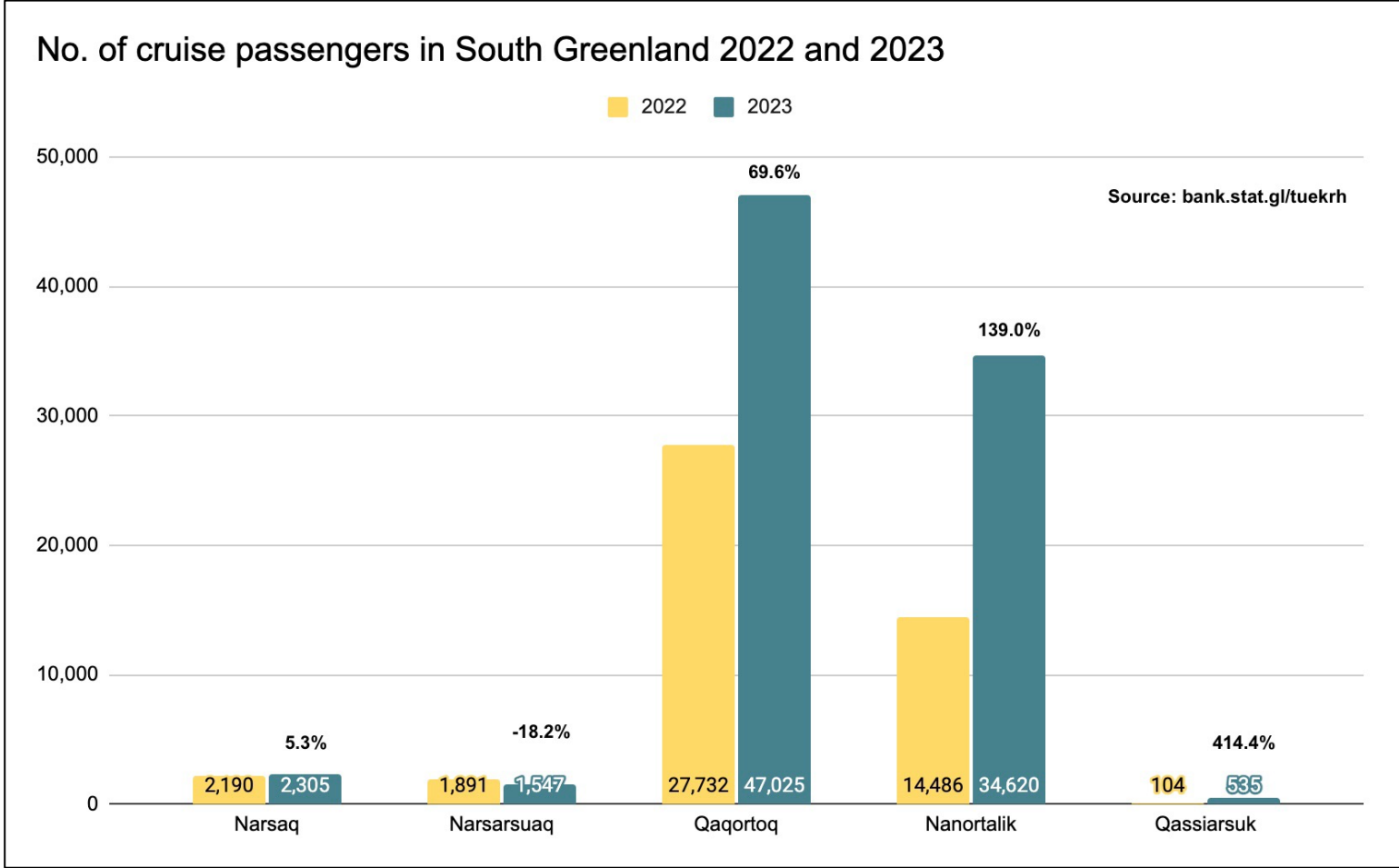
So even though there were fewer foreign guests, the revenue was greater in 2023 because each guest on average purchased more overnight stays.

Note that there can be significant differences in how cruise tourism versus land-based tourism performed, which the next page helps to uncover.

South Greenland: No. of cruise passengers 2022 and 2023



In 2023, the cruise sector experienced a total growth of 85.4% in the number of cruise passengers on board ships that docked in the region. As can be seen in the graph at the bottom, the primary growth was in Qaqortoq and Nanortalik, which led the increase, while in the other destinations in South Greenland, there was no significant difference in the number of passengers.



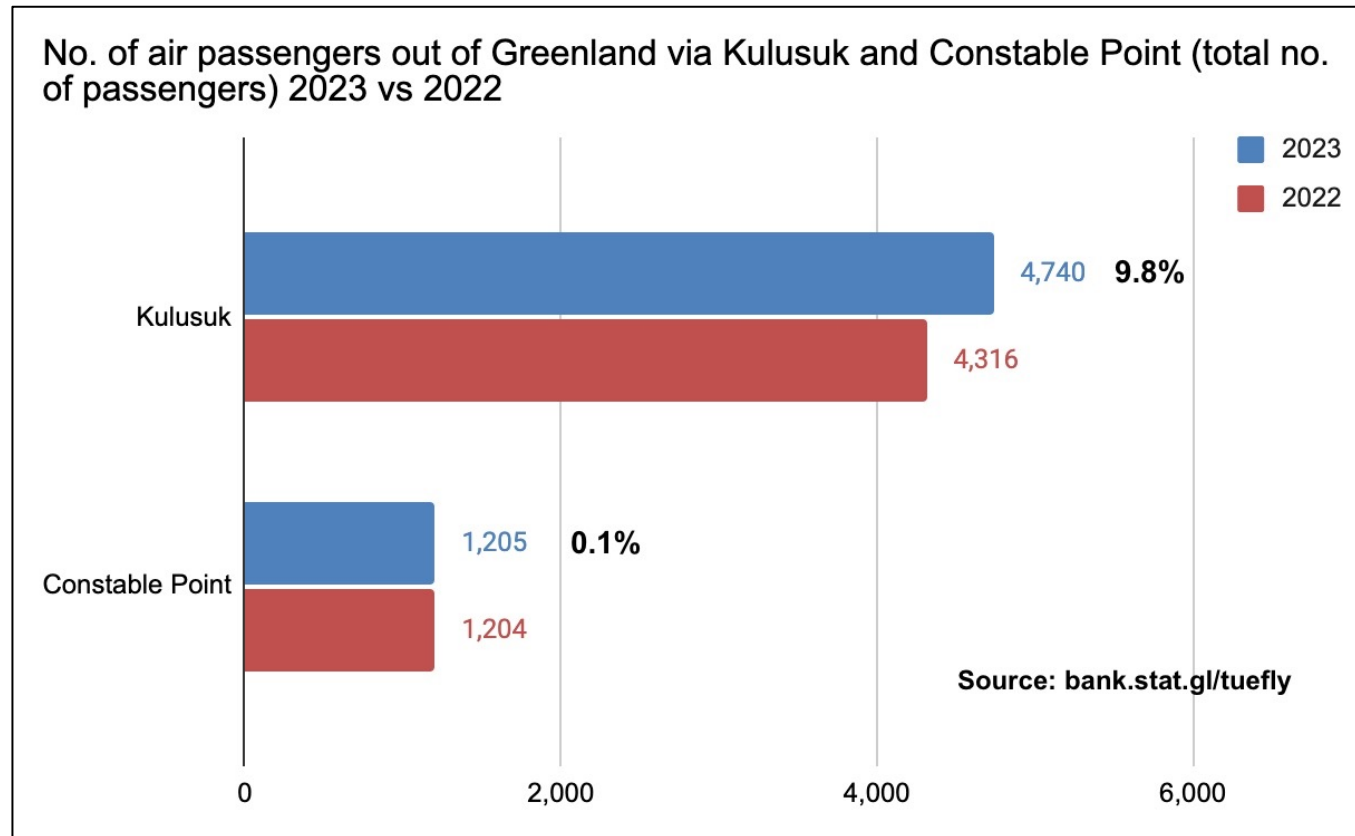
While South Greenland is one of the two regions (along with East Greenland) where land-based tourism constitutes the smallest share compared to other regions, South Greenland is Greenland's largest cruise destination, holding a national share of 45.9% in terms of the total number of cruise passengers at ports of call in Greenland.

This is partly due to the region's southern location, which makes it easier for transatlantic voyages to stop by.

East Greenland: Air passengers out of Greenland via Kulusuk and Constable Point 2023 vs 2022

Unfortunately, there are no statistically valid country of residence data for Kulusuk and Constable Point in 2022 and 2023, so we focus on the total number of passengers. In 2019, the proportion of foreign passengers on international departures from Kulusuk was 70.7%. The corresponding proportion in Nerlerit Inaat was 66.2%.

A growth of 9.8% in foreign air passengers in Kulusuk indicates a good season for land-based tourism in the Angmassalik area.



In Ittoqqortoormiit, the number of passengers on departures from Nerlerit Inaat to Akureyri remained largely unchanged, which may indicate a status quo in terms of land-based tourism.

When Nuuk airport opens its 2,200-meter configuration for transatlantic routes, there will also be a change with Air Greenland increasing the number of departures between Nuuk and Kulusuk.*

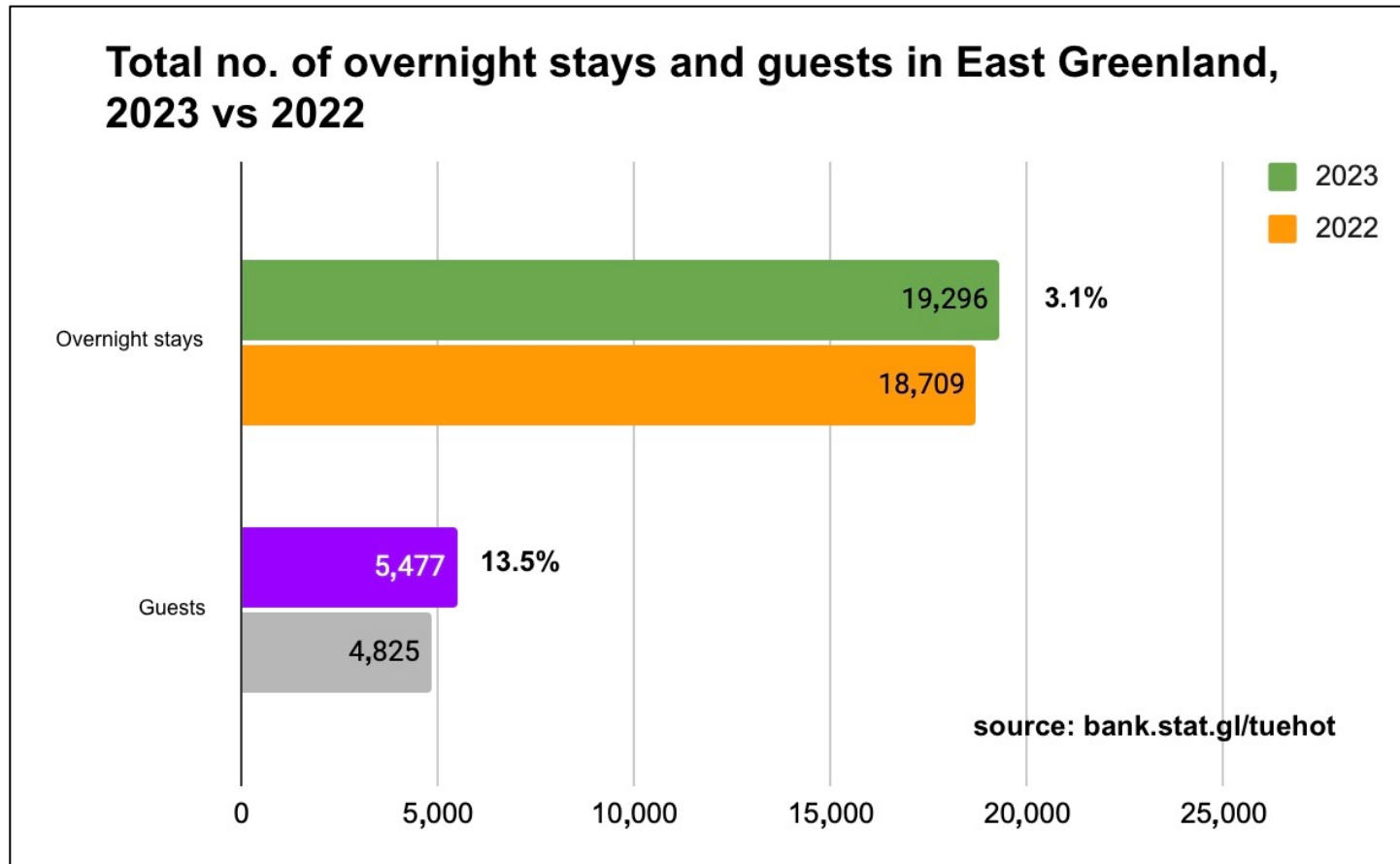
This will more closely connect Kulusuk to Air Greenland's international route network between Nuuk and Copenhagen, creating better conditions for tourism in the Angmassalik area.

*Source: <https://sermitsiaq.ag/node/248982>

East Greenland: No. of overnight stays and guests 2023 vs 2022

As mentioned before, unfortunately, there are not enough country of residence data from East Greenland to show the country segments - and thus the growth in the number of foreign overnight stays and guests (i.e., tourists).

However, from the total number of overnight stays and number of guests shown below, we can see that in 2023 there was a decent growth at the accommodation sites.



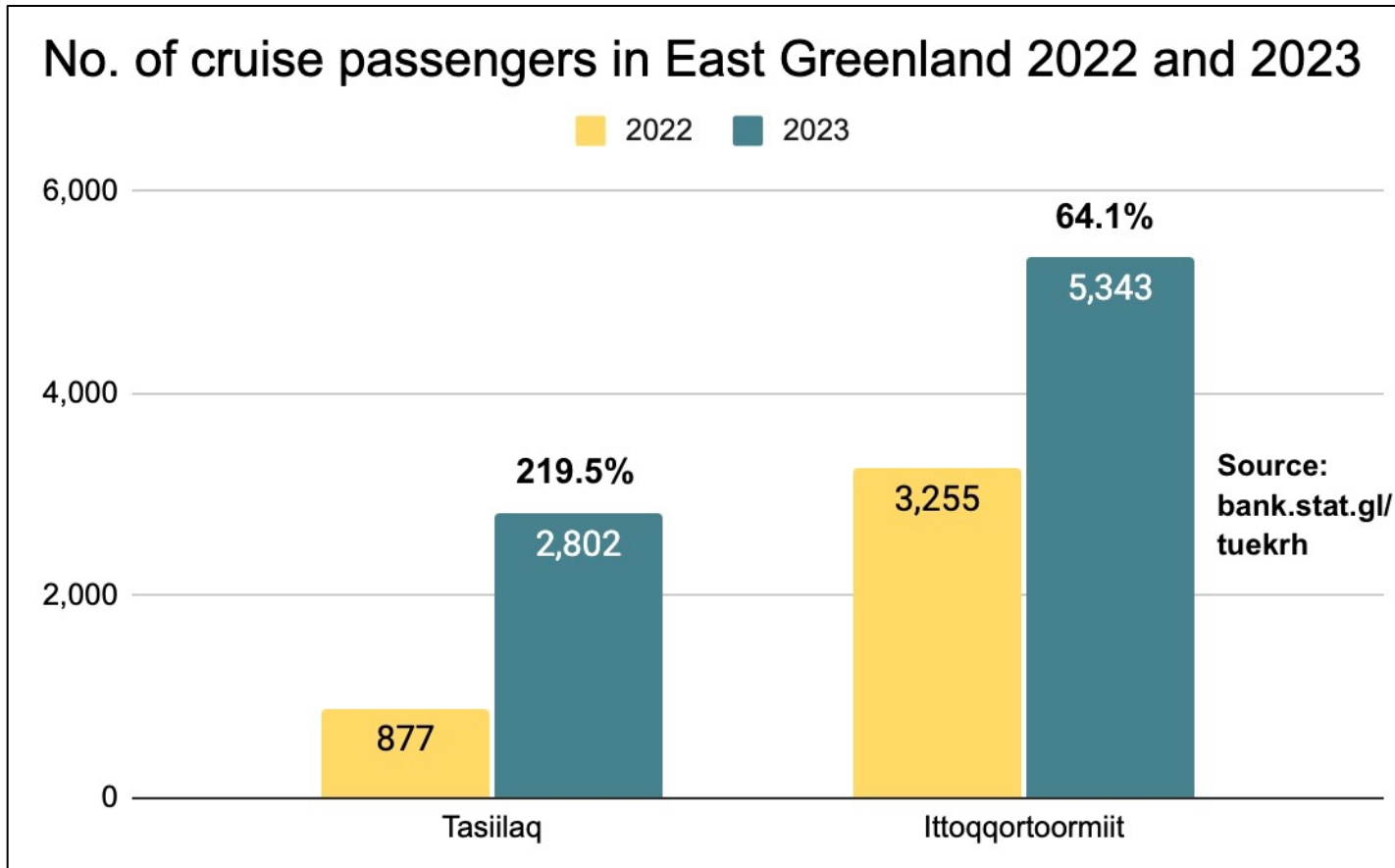
The number of overnight stays says a lot about the revenue of accommodation sites, while the number of guests indicates how many tourists were in the region, who had the opportunity to purchase tour products, food, souvenirs, and other goods and services.

As mentioned on the previous page, the Angmassalik area will be better connected to Air Greenland's route network when the new airport in Nuuk opens, which gives reason for optimism for land-based tourism in the coming years.

East Greenland: No. of cruise passengers 2022 and 2023

The substantial growth in the number of cruise passengers in Greenland by 73.8% on a national level is also evident in East Greenland, where there was a growth of 219.5% in Tasiilaq and 64.1% in Ittoqqortoormiit. These very high growth rates could indicate an increased interest in and demand for cruises in East Greenland.

In Ittoqqortoormiit, the main attraction is Greenland's National Park, which is the largest in the world.



As of April 2024, 10 port calls are announced in Tasiilaq and 33 in Ittoqqortoormiit, compared to 14 and 49 respectively in 2023.

So, even though there was a very strong growth in 2023, it could well be indicative of natural - and significant - variation in the shipping companies' sailing schedules over several years.

An aerial photograph of a wide fjord in Iceland. The water is a deep blue-grey, with white wakes from a boat visible in the lower-left quadrant. The right side of the fjord is bordered by a green, grassy slope that meets the water at a rocky shoreline. In the background, dark, rugged mountains rise under a heavy, grey, overcast sky. The overall mood is dramatic and scenic.

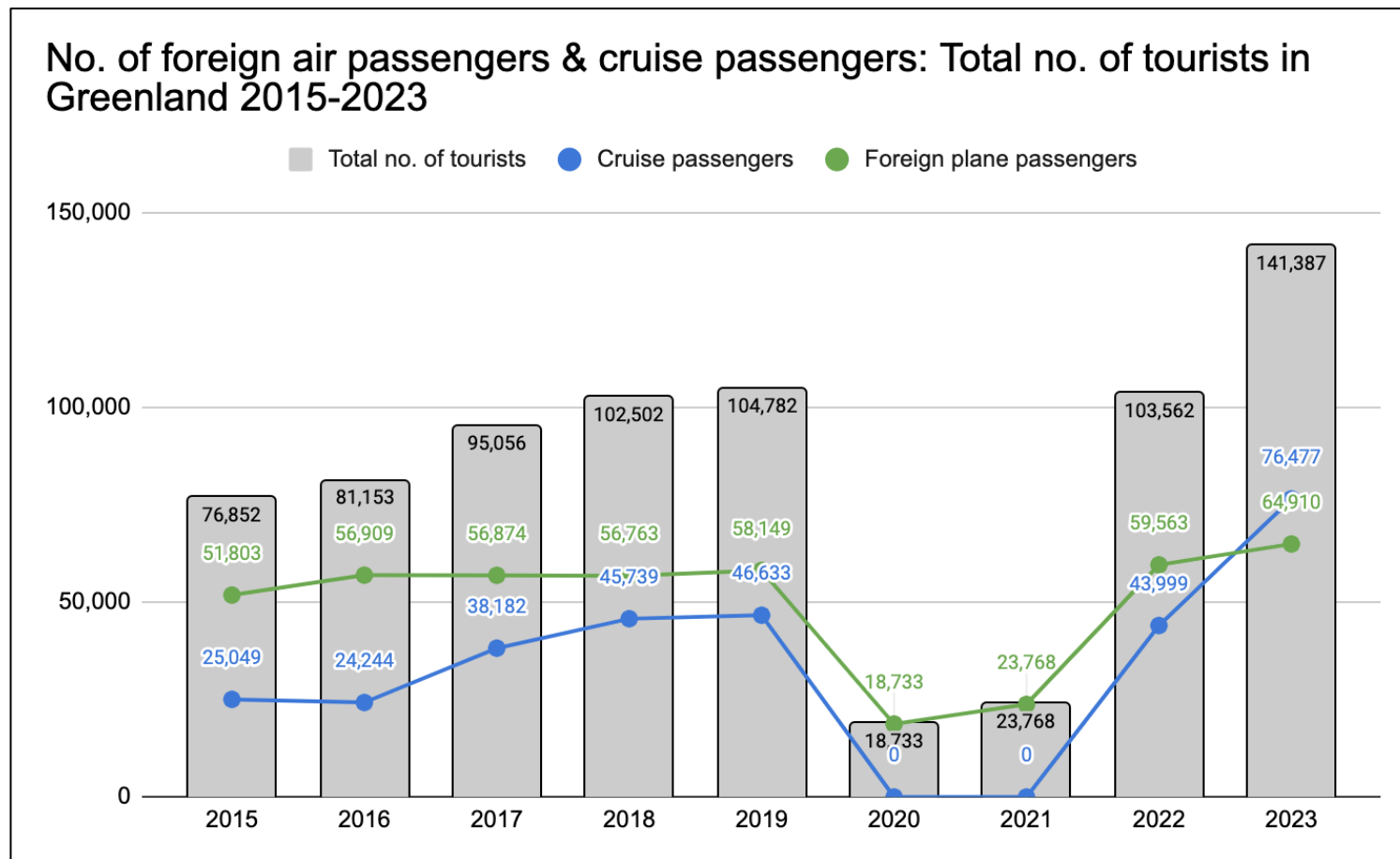
Historical perspective

- national
- Iceland

No. of tourists in Greenland 2015-2023 – land-based and cruise

2014 was the first year that registrations for cruise passengers were submitted, and 2015 is the first full year that the country of residence was registered for air passengers on departures out of Greenland. In the graph below, we can thus follow both land-based tourism and cruise tourism in Greenland over 9 years from 2015 to 2023.

Excluding the 2 COVID-19 affected years, an increasing trend emerges.



First and foremost, Greenland was one of the countries in the world that recovered the fastest from the pandemic's travel restrictions, nearly reaching its 2019 levels in 2022, in terms of both land-based tourism and cruises.

However, 2023 distinctly stands out with its significant growth - especially in the cruise sector.

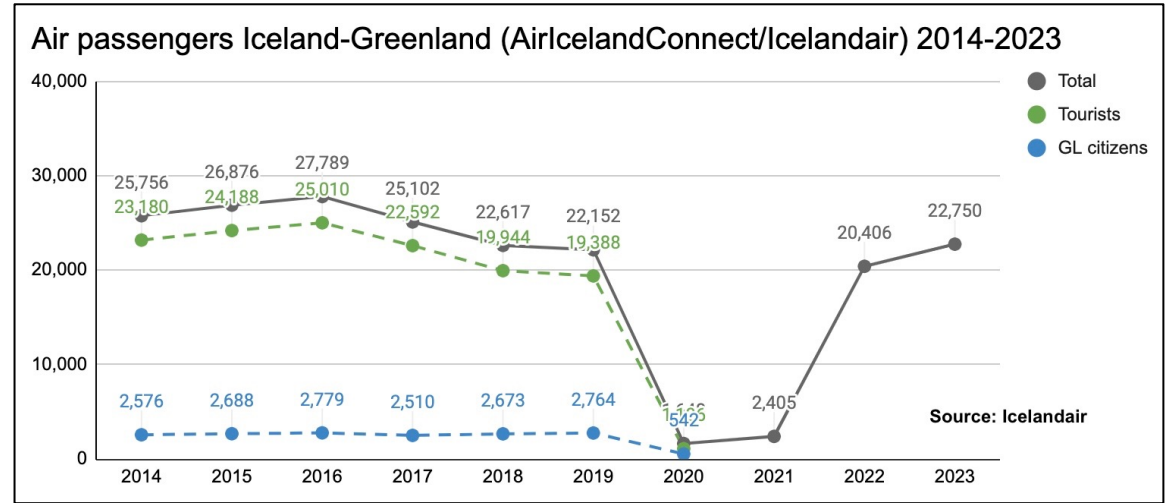
Air Iceland Connect (Icelandair) routes, and the development in Iceland



Tourists on Air Iceland Connect routes 2014-2022

Air Iceland Connect, which was taken over by Icelandair in March 2021, experienced growth on their routes to Greenland until 2016, but the years 2017, 2018, and 2019 saw a decline. The reason for this is unclear, especially since there was a slight growth in the total number of tourists flying out of Greenland during the same period (note: from 2020, Icelandair has no valid data on the split between tourists and GL citizens).

Icelandair experienced a decent growth in the number of passengers between Iceland and Greenland by 11.5% in 2023, reaching the 2019 levels.



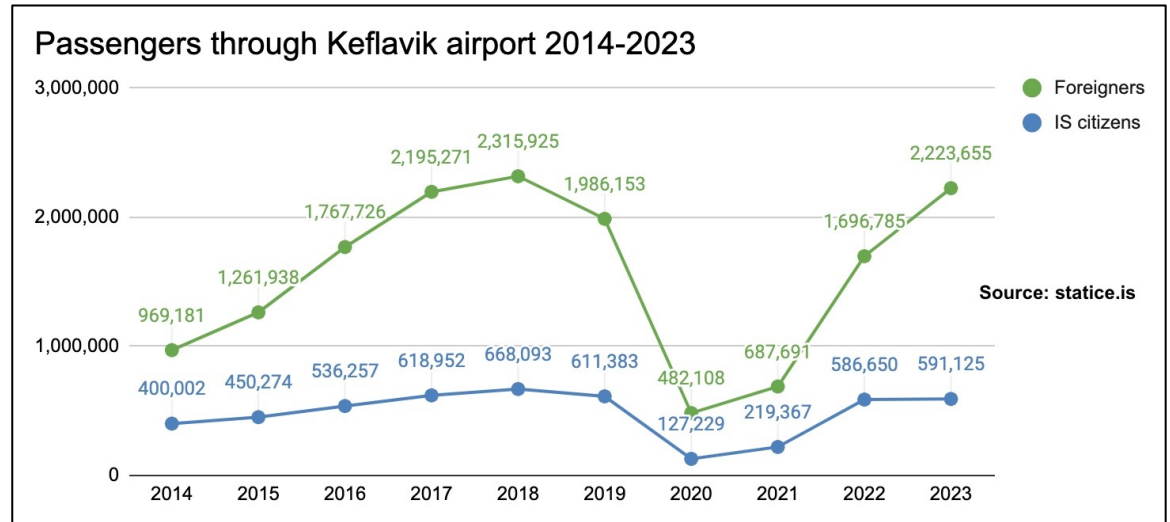
Tourists on all departures from Greenland

The years 2020 and 2021 are marked separately in the bottom right graph, as one should disregard these two COVID-19 affected years when considering the 'true' demand not affected by the pandemic (note: there is only residence data for passengers out of Greenland including all airlines from 2015 onwards). 2023 was the year with the most foreign air passengers on flights out of Greenland.

Development in Iceland

As shown in the bottom right graph, 2023 was the year when the number of foreign air passengers through Keflavik Airport nearly reached the same level as in 2018, which so far had the highest number of foreign passengers.

This indicates a rising trend both after a slowdown before the COVID-19 years 2020-2021, and a strong recovery after the pandemic.



Relevant analyses



Tourism sentiment survey Q1-2024

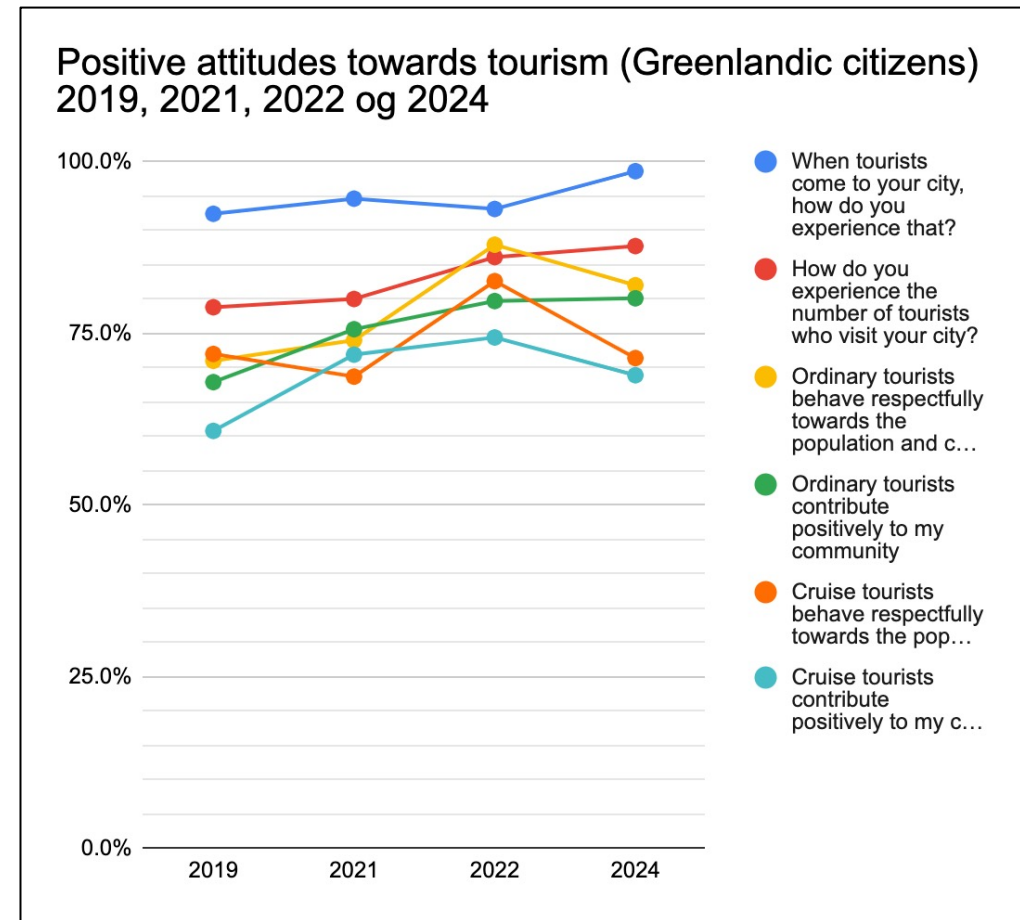
Executive Summary

(The full report can be read at vg.gl/bef24. Note: in Danish only)

Visit Greenland has surveyed the attitudes towards tourism among the population of Greenland four times. In each of these surveys, we asked the same six questions. In 2019 and 2021, we conducted the surveys through phone interviews with respectively 831 and 700 participants. In 2022 and 2024, the surveys were conducted online with respectively 2,189 and 3,432 participants. In the first quarter of 2024, 2,614 people completed the questionnaire in Greenlandic and 818 in Danish.

In the 2022 survey, regarding the question about how one feels affected by tourists in their city, one could choose between 'I sometimes feel annoyed by tourists' and 'I often feel annoyed by tourists.' In the 2024 survey, this question was changed to only 'I have had negative experiences with tourists,' but respondents were also required to provide a detailed description in a free text field. This change might have led to more participants in the 2024 survey choosing a more positive response option for these two questions, compared to 2022. However, the detailed descriptions provide a deeper and more nuanced insight into how tourism affects the local population.

The graph to the right shows the development regarding positive responses (i.e., other response options than neutral, negative, and 'other') to the six recurring questions in the four surveys.



The average positive response rate in 2019, 2021, 2022, and 2024 for the six aforementioned questions was respectively 73.8%, 77.5%, 84.0%, and 81.5%. This is a high level compared to other Nordic countries like Denmark, Iceland, and the Faroe Islands*.

*Source: VisitDenmark, Iceland Tourist Board, and VisitFaroelands, not all results are publicly available.

Socio-economic gain from foreign tourism, Part 1

Background

Visit Greenland, in collaboration with Air Greenland, Greenland Airports, Sikuki, AECO, Nalik Ventures, and Grønlandsbanken, has conducted an economic analysis of the impact of foreign tourism on the Greenlandic economy, prepared by Ramboll.

The last major survey on tourists' daily expenditure was in 2009 (Statistics Greenland), making it very timely to collect new data for more statistically valid estimates on tourists' spending, cruise ship operators' expenditure in Greenland, and economic key figures such as derived gross value added, tax revenue, and employment.

Tourism is one of the economic pillars of society, and it is essential for politicians, private investors, and tourism actors to have solid figures and estimates on the economic importance of tourism - now and in the future.

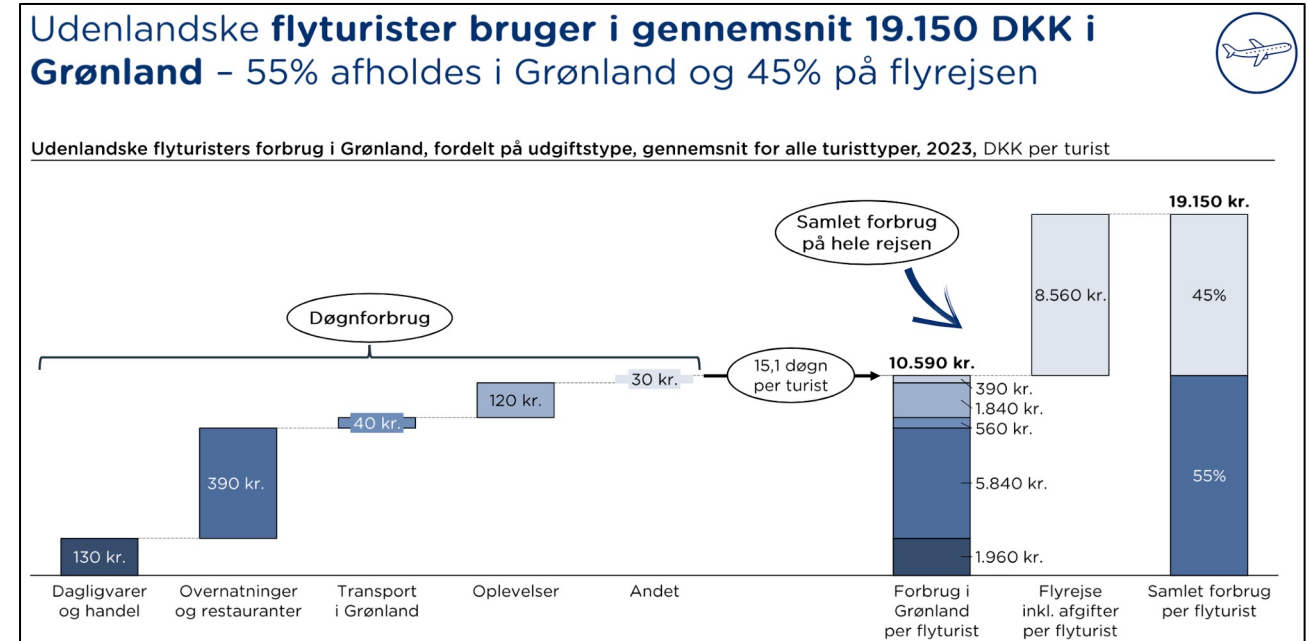
Method

Tourists are divided into three types: Air tourists (who arrive and depart by air), conventional cruise tourists (on ships with over 500 passengers), and expedition cruise tourists (on ships with under 500 passengers).

Air tourists are further divided into segments: holiday travelers, business travelers, and those visiting friends and family.

The following definition of a tourist is used: A person who is outside their usual environment for at least one night and up to three months. This focus is only on tourists residing outside Greenland. There were a total of 560 respondents.

Tourism-Generated Revenue 2023



The graph above is an excerpt from the analysis and shows the estimated average spending of an air tourist in Greenland.

Conventional cruise tourists spend an average of 2,010 DKK in Greenland, of which 45% is spent in Greenland and 55% on air travel.

Expedition cruise tourists spend an average of 3,660 DKK in Greenland, of which 66% is spent in Greenland and 34% on air travel.

Socio-economic gain from foreign tourism, Part 2

Daily Expenditure and Total Expenditure throughout the trip

Broken down by the three segments, the consumption figures show that holiday travelers have the highest daily spending in Greenland, excluding flight expenses.

Business travelers have the largest total expenditure due to higher spending on air transport.

Those visiting friends and family have the lowest total expenditure of the three segments. However, it is only 16% lower than the total expenditure for holiday travelers and 31% lower than that for business travelers.

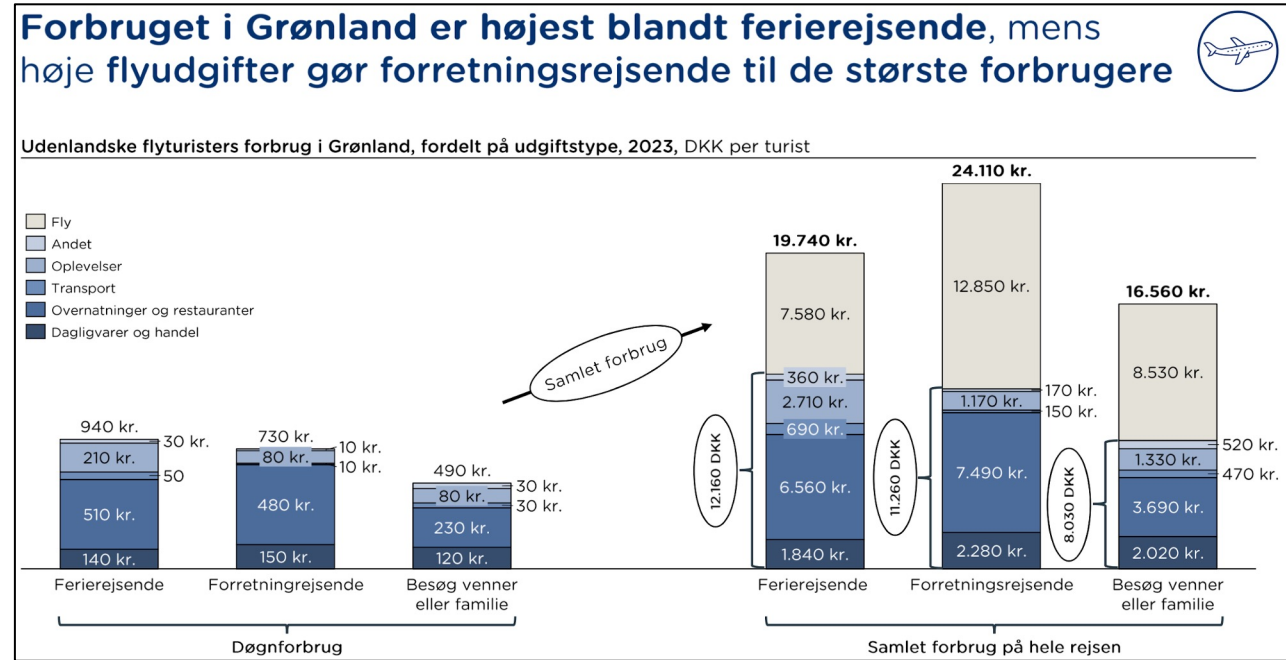
Example of Expenditure for a Family of Three

An average family of three in the 'air tourist' segment has a total expenditure in Greenland of 57,500 DKK.

An average family of three in the 'conventional cruise' segment spends a total of 27,150 DKK in Greenland.

An average family of three in the 'expedition cruise' segment spends a total of 38,350 DKK in Greenland.

For the two cruise segments, this figure includes the expenses that the shipping companies have (per passenger) on operational costs and fees.



Examples of Other Key Figures

Revenue from foreign tourism amounted to nearly 1.9 billion DKK in 2023. Air tourism accounted for 57% of this revenue.

The revenue from foreign holiday travelers (excluding business travelers and those visiting friends and family, including all cruise tourists) is estimated to be between 1.3 billion DKK and 1.7 billion DKK in 2023.

Foreign tourism contributed a gross value increase of 1.2 billion DKK in 2023, with 60% of this coming from air tourism.

The full report can be read at vg.gl/ramboll24 (Note: The report is written in Danish)

Final comments

In conclusion, it is clear that 2023 has been a year of significant progress for tourism in Greenland, aided by a rebuilt interest following the pandemic and natural growth in land-based travel experiences. This upward trend is further supported by the exciting developments expected with the opening of the new transatlantic airport in Nuuk, and the upcoming new airports in Ilulissat and Qaqortoq - all of which will undoubtedly increase access to and interest in Greenland as a destination.

These advancements are not just figures on paper but also an indicator of the opportunities and challenges that lie ahead. It is vital that we continue to prepare to meet and manage the increased flow of tourists sustainably, respecting both our culture and our environment - and ensuring socio-economic benefits.

The economic analysis of foreign tourism has given us a deeper understanding of tourism's substantial contributions to Greenland's economy. It is now up to all of us - the government, tourism actors, and society as a whole - to take these insights and translate them into action.

We look forward to 2024 with optimism and a firm belief that the coming years will bring both growth and new opportunities for everyone within the tourism industry in Greenland. Let us ensure together that tourism continues to be a force for positive change in our society.

With these thoughts, we wish everyone involved a successful 2024 season.

Best regards,

Visit Greenland

