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# GREENLAND:
## ADVENTURE TRAVEL TRADE PERCEPTIONS

June 2026

Photo by Emmett Sparling - Visit Greenland

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# Key Findings

## Trips to Greenland

- 34% currently offer Greenland; another 62% intend to, showing significant untapped potential.
- Soft, activity-based and cultural adventures dominate Greenland itineraries.
- Top barriers: a perceived lack of client demand and not knowing which DMCs / local operators to use.

## Perception of Greenland

- Greenland's adventure tourism rates 7.9 / 10 for attractiveness.
- Word associations: remote, glaciers, expedition, wildlife, undiscovered.
- Iceland is the dominant perceived competitor, named ~3x more than any other destination.

## Access & Demand

- Air access is the standout friction: availability of international flights is the lowest-rated aspect (5.6 / 10).
- 74% of operators send fewer than 10 clients a year; demand ranks just 3.1 / 10 vs other destinations.

## Improving Awareness

- FAM tours are the #1 requested resource, then connections to quality local partners and webinars.
- No respondent cited safety, guiding quality or language as barriers; perceptions are positive where they exist.

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# Part I:

## Introduction

Photo by Sergei Gapon - Visit Greenland

# Methodology

Periodically, the ATTA conducts surveys about the status of adventure tourism in individual countries, known as *Adventure Travel Trade Perceptions of a Destination*.

- A survey was distributed to the worldwide ATTA member community in April and May 2026.
- It asked about respondents' trips to Greenland (if any) and how Greenland is perceived by their organizations and clientele.
- 244 valid responses were collected and analyzed. Individual questions show their own base (n) where respondents skipped, or where a question applied only to a subset.

**244**

valid responses analyzed

Source: 2026 Greenland Destination Perception Survey

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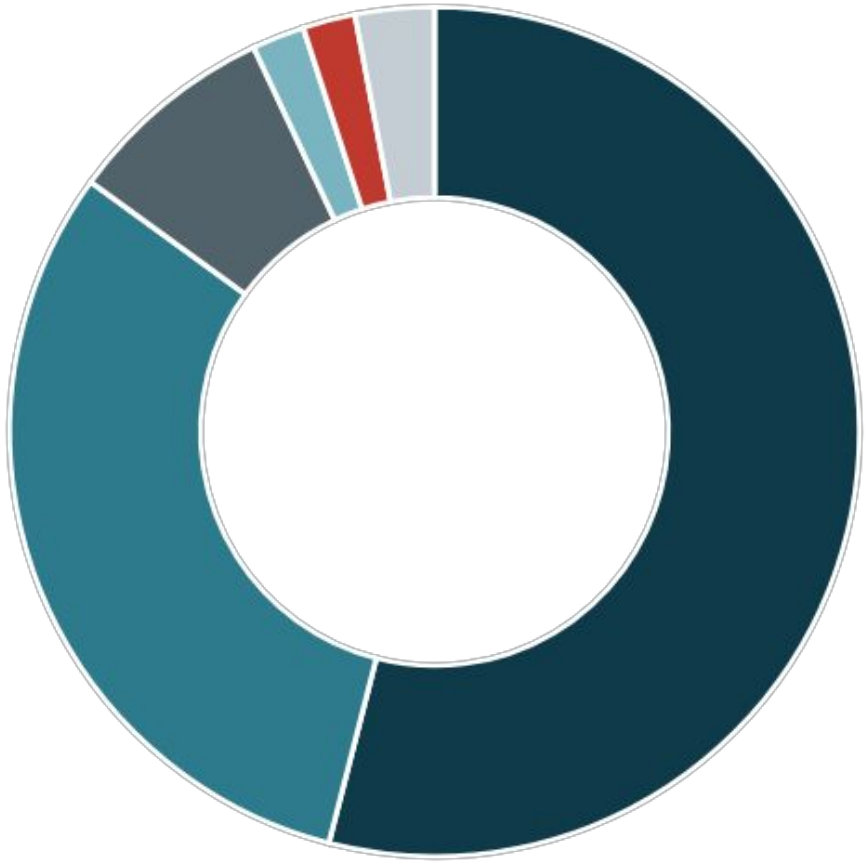
# Part II:

## Respondent Profile

Photo by Aske Rif - Visit Greenland

# Operation Type

Travel advisors and outbound tour operators make up the large majority of respondents — the buyers who decide which destinations to put in front of travellers.

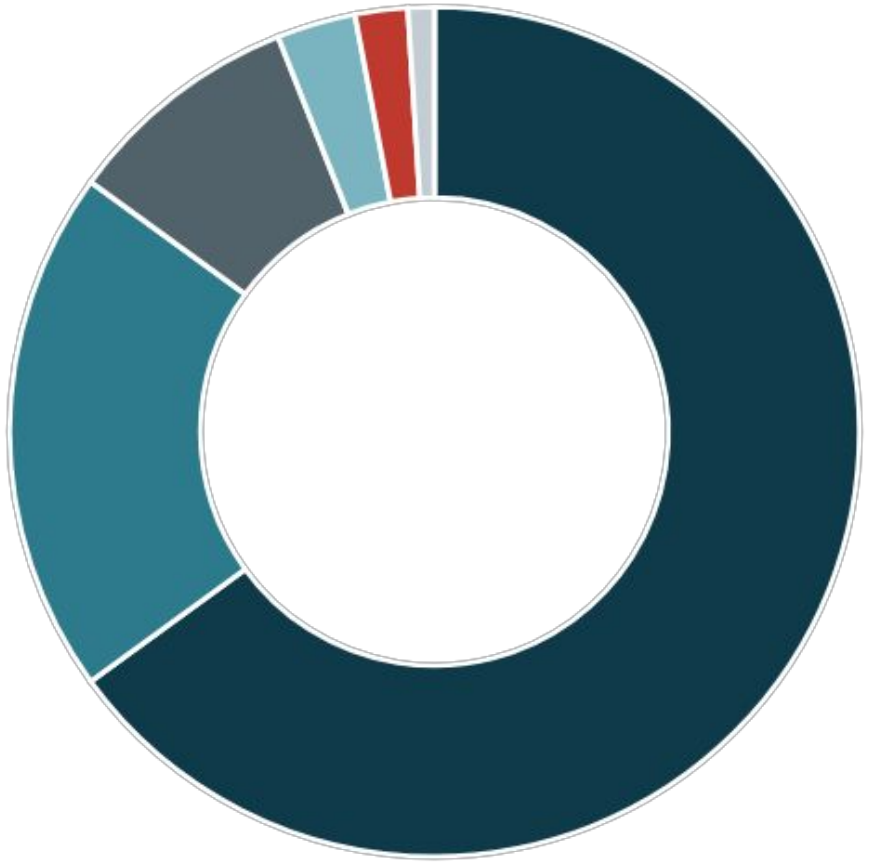


- **Travel Advisor / Agent** 54%
- **Outbound Tour Operator** 31%
- **Outbound & Inbound Operator** 8%
- **DMC Tour Operator** 2%
- **Inbound Tour Operator** 2%
- **Other** 3%

Q: Please select the type of business that best describes your organization.
Base: All respondents (n=244). Source: 2026 Greenland Destination Perception Survey

# Organization Headquarters

Two-thirds of respondents are headquartered in North America, with Europe the next largest source market. Global figures are therefore weighted heavily toward North American views.

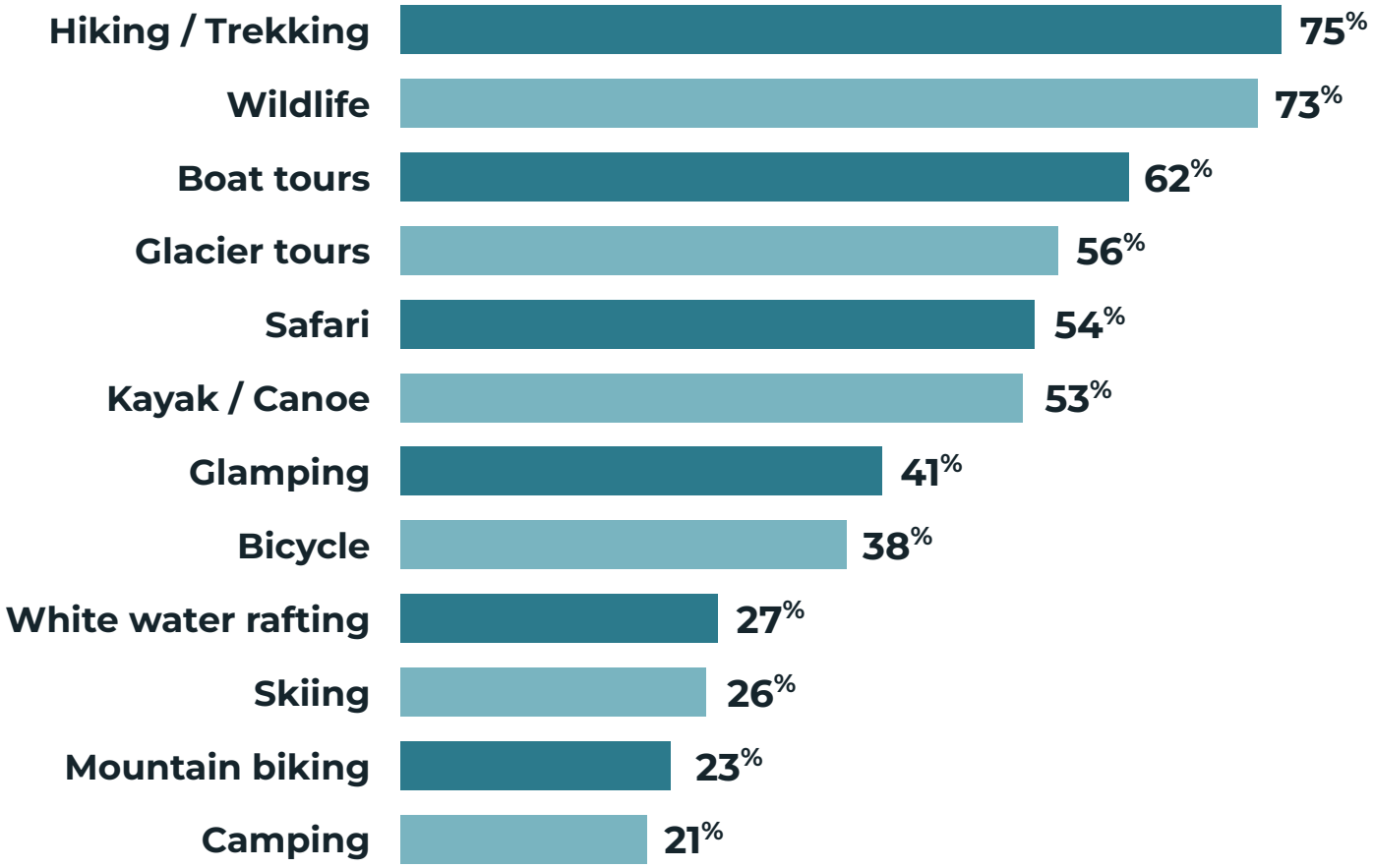


- **North America** 65% (159)
- **Europe** 20% (50)
- **Asia-Pacific** 9% (22)
- **Latin America** 3% (7)
- **Africa** 2% (4)
- **Middle East** 1% (2)

Q: In which region is your organization headquartered?
Base: All respondents (n=244). Source: 2026 Greenland Destination Perception Survey

# Activities Offered in General

Hiking/trekking and wildlife dominate respondents' overall portfolios (not specific to Greenland). Boat tours, glacier tours and kayaking — all core to Greenland — are also widely offered, a strong fit for the destination.




### "Other" Responses

- Cultural activities
- Scuba & snorkeling
- Fishing
- Photography
- Heli-flights
- Culinary
- SUP & sailing

*Respondents could choose more than one answer.*

Q: Types of trips currently offered on your itineraries in general (select all that apply).
Base: Respondents who answered (n=244). Source: 2026 Greenland Destination Perception Survey

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# Part III: Perception of Greenland

Photo by Carmen Huter - Visit Greenland

# Attractiveness of Greenland's Adventure Tourism

Greenland's adventure tourism is rated as quite attractive, with room to grow. Respondents gave an average score of 7.9 out of a possible 10.

### Highest across regions

Africa (8.75) and the Middle East (9.0) rate Greenland most attractive; Europe leads the large regions at 8.2.

*Note that these regions should be read with caution given small samples.*

### Strong but not yet acted upon

96% of respondents already offer Greenland or intend to; attractiveness is converting slowly into bookings.

### Quality is not the issue

Guides (7.9) and product innovation (7.9) score well; the gaps are access and demand, not the product.

*Scores are out of 10.*

Q: Please rate the attractiveness of Greenland's adventure tourism overall.
Base: All respondents who answered (n=244). Source: 2026 Greenland Destination Perception Survey

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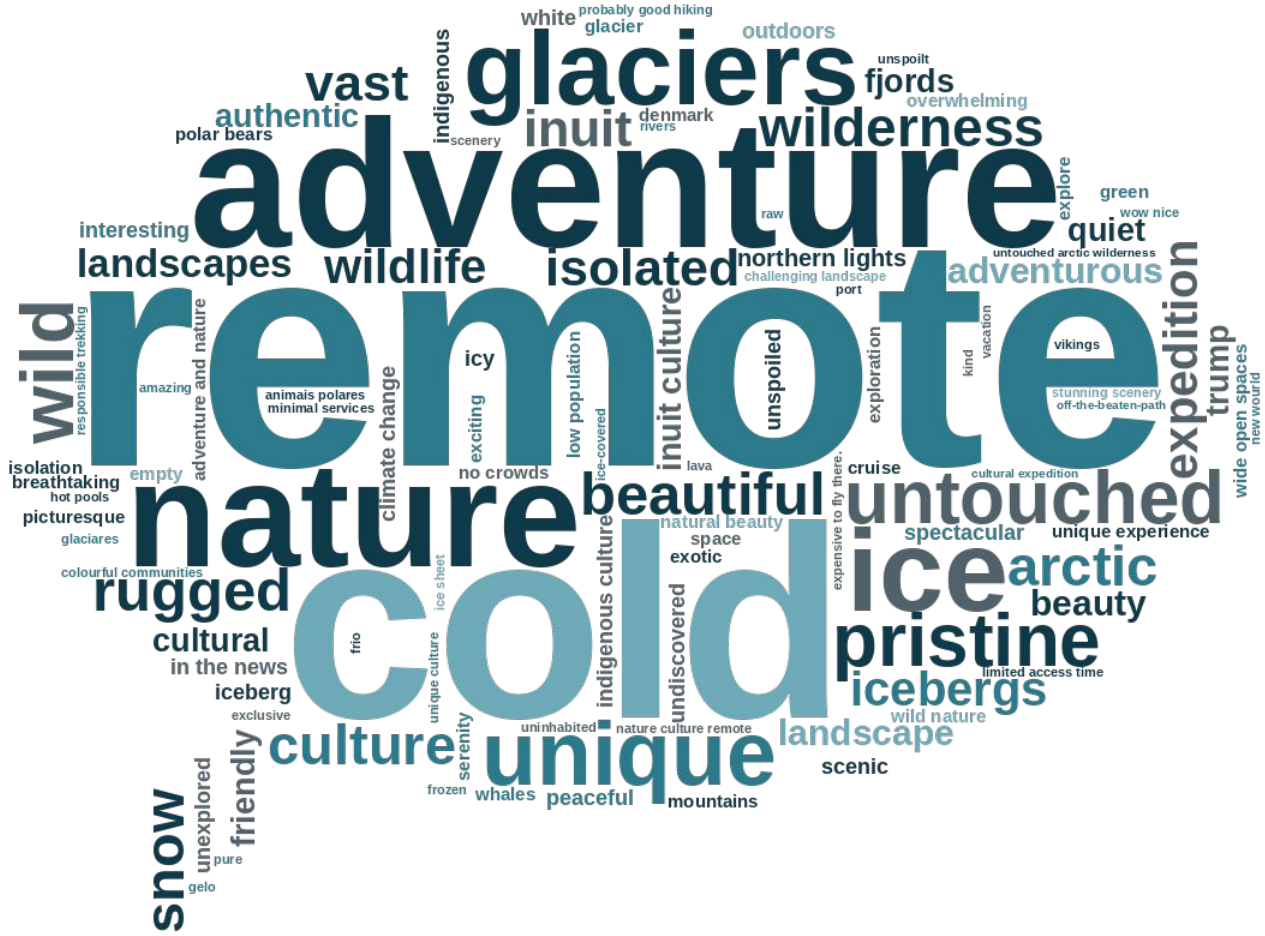
# The Appeal of Greenland: General Perception

When thinking about Greenland in general, respondents associate the country with a remote, ice-covered Arctic wilderness of glaciers, icebergs, and untouched natural landscapes.

Greenland is perceived as pristine, rugged, exotic and adventurous, with a distinctive Inuit culture and abundant wildlife.

A smaller number referenced the country's recent political prominence (associations with Trump and Denmark).




Q: Top words that come to mind when thinking about Greenland overall? (open response, categorized by the research team)
Base: All respondents who answered (n=244). Source: 2026 Greenland Destination Perception Survey

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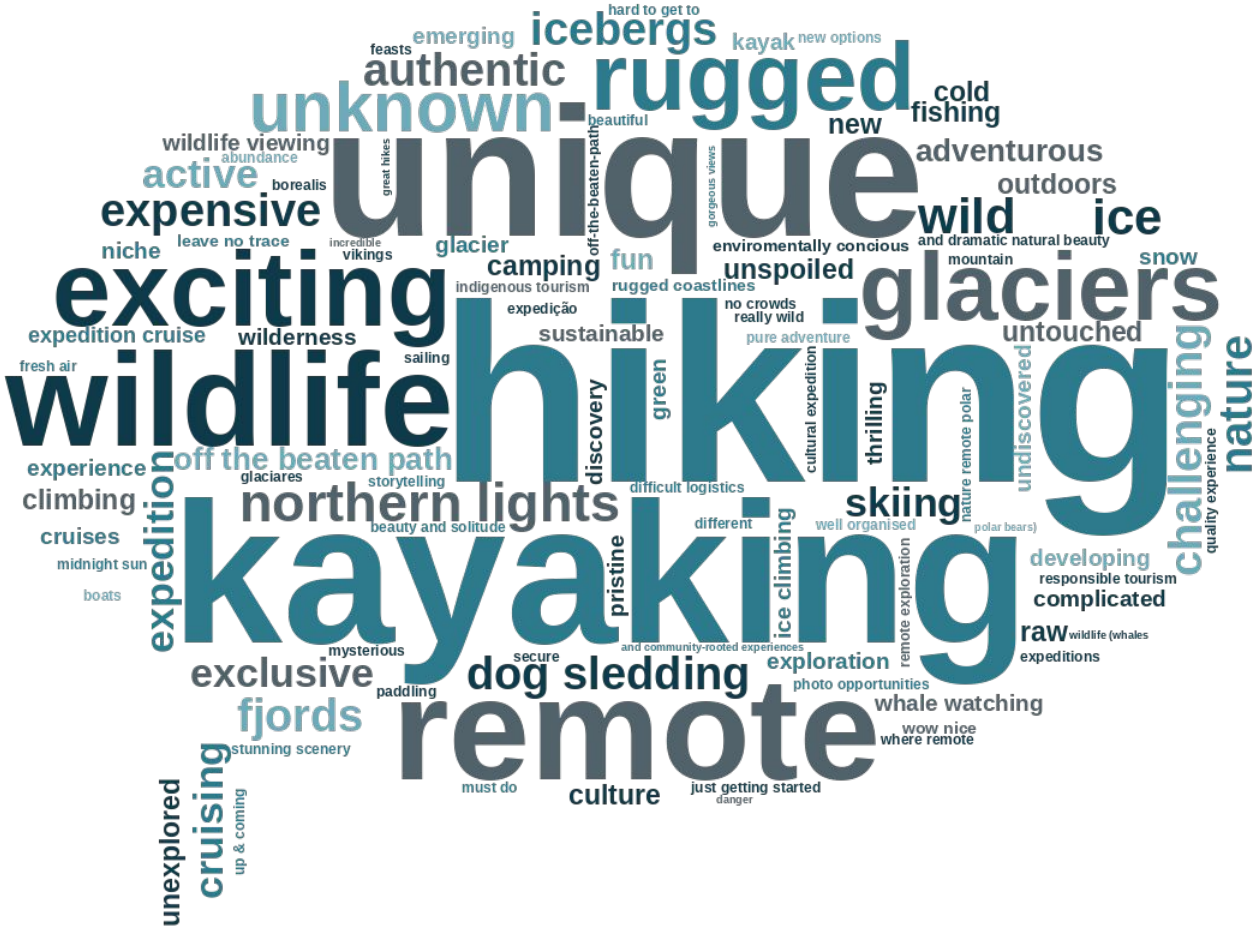
# The Appeal of Greenland: Adventure Travel

Asked specifically about Greenland's adventure offering, the most well-known activities are hiking and kayaking, along with dog sledding, glacier trekking, and wildlife watching.

Expedition cruises, northern lights viewing, and fjord and iceberg excursions feature prominently, typically framed as expedition-style, off-the-beaten-path experiences.

Notably, many respondents indicated limited awareness — describing Greenland as undiscovered, emerging, or untapped.




Q: Top words that come to mind when thinking about Greenland's adventure tourism? (open response)
Base: All respondents who answered (n=244). Source: 2026 Greenland Destination Perception Survey

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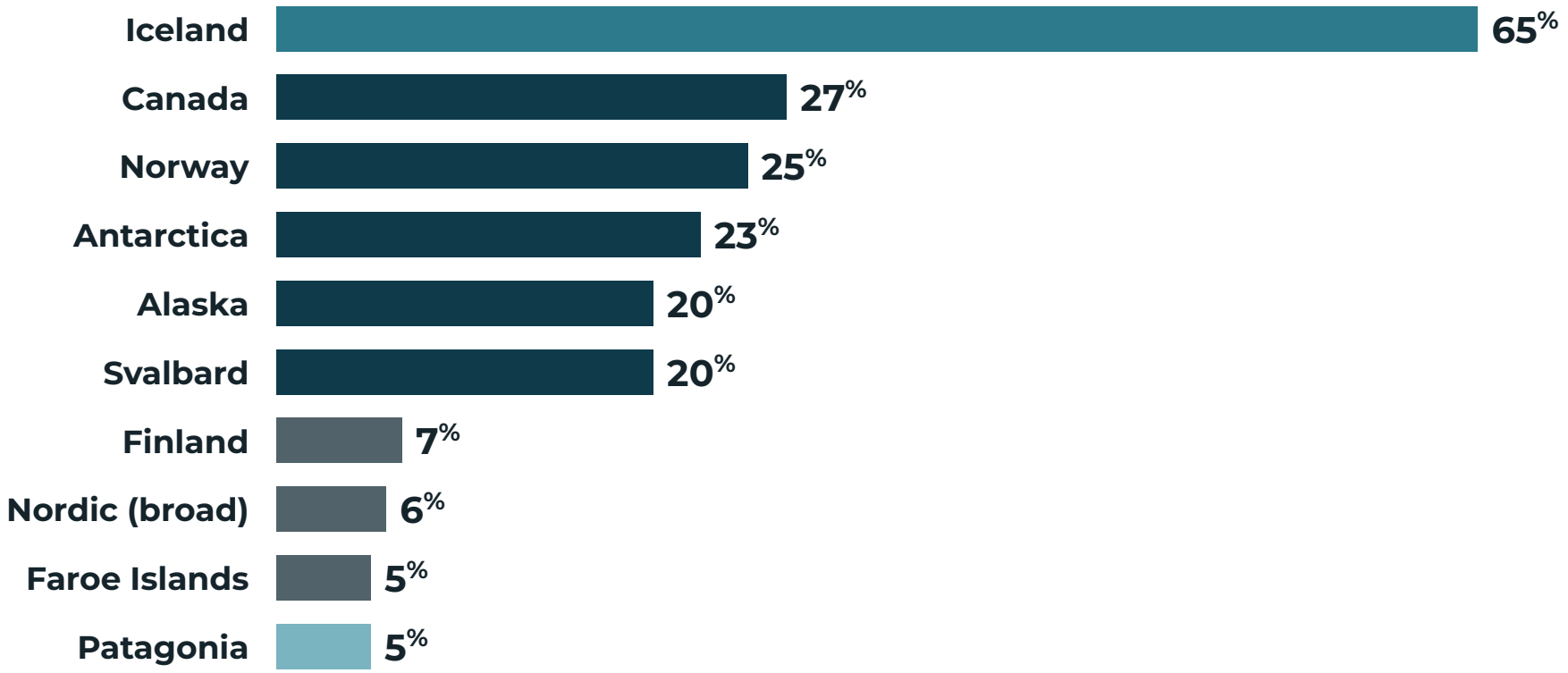
# Greenland's Adventure Travel Competition

Asked to name Greenland's primary competitors, respondents pointed overwhelmingly to Iceland — mentioned roughly three times as often as any other destination and cited as the closest direct rival thanks to its easier access. Beyond Iceland, competitors cluster firmly around the Arctic and polar regions.




*Open-ended text question; respondents could enter any number of destinations*
*Sub-regions are rolled up into their country / region*

Q: In your opinion, what are Greenland's primary competitors for adventure travel?
Base: All respondents who answered (n=237). Source: 2026 Greenland Destination Perception Survey

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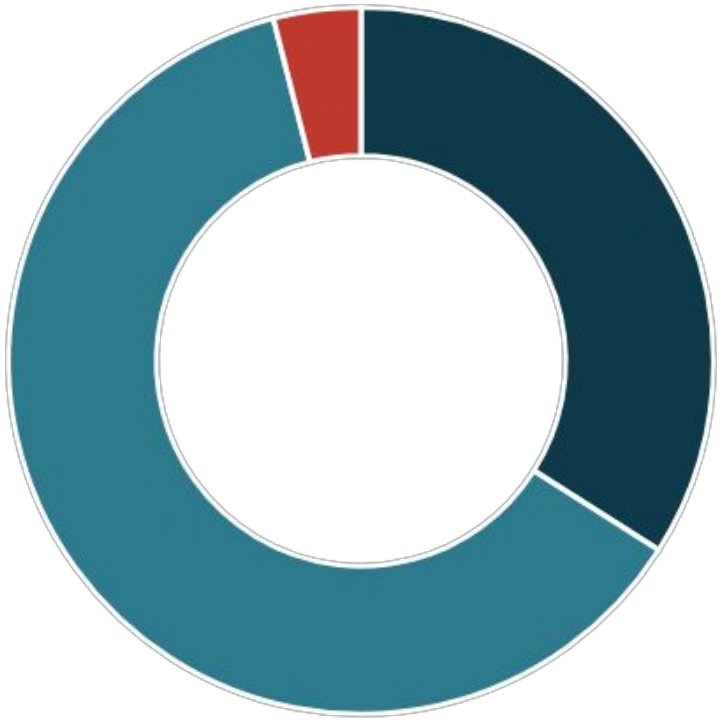
# Part IV: Offering Greenland

Photo by Norris Niman - Visit Greenland

# Offering Greenland

Sixty-two percent of respondents do not currently offer Greenland but intend to add it in the future. 34% already work in Greenland, while just 4% are not interested. The 62% shows a large warm pipeline of latent demand.



**34%** Yes — already offer

**62%** No, but intend to in the future

**4%** No, and do not intend to

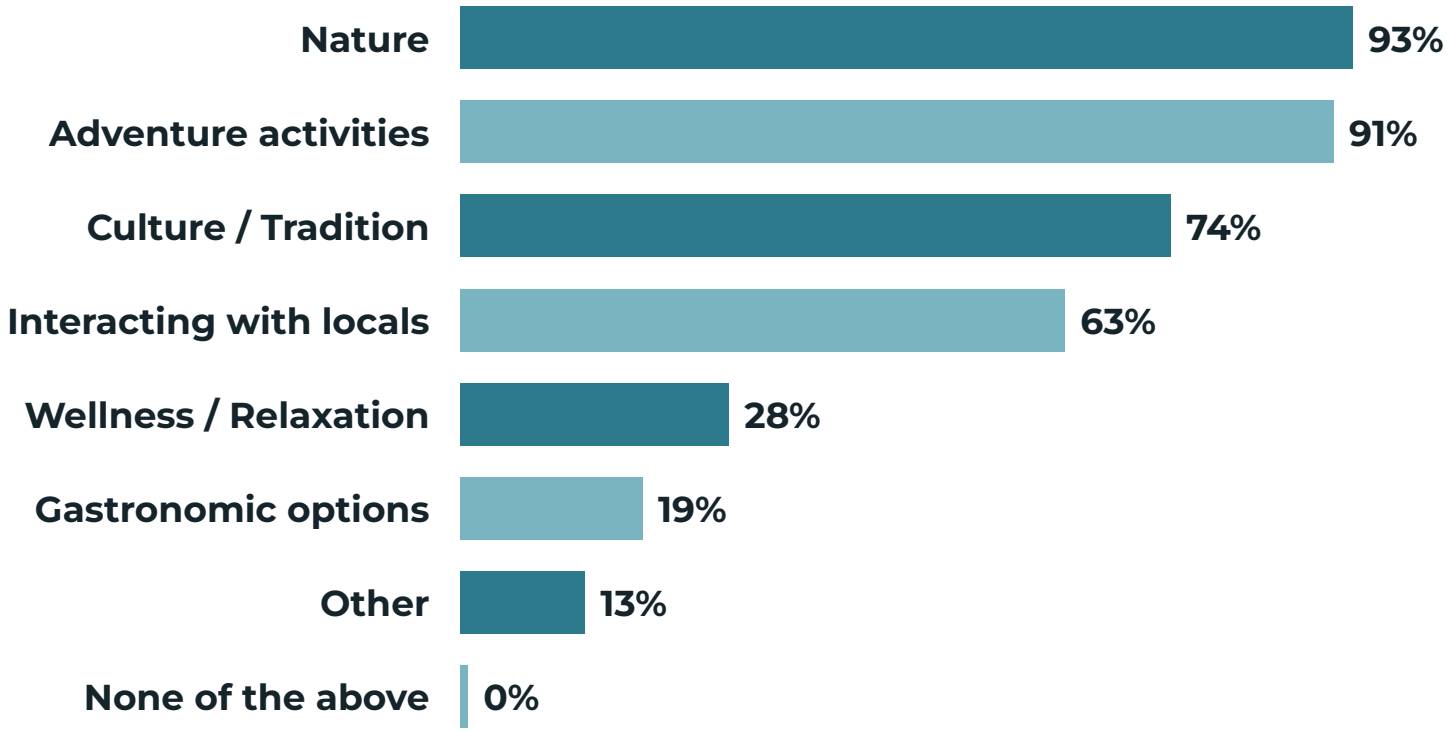
### The opportunity

The 62% who intend to offer Greenland but haven't yet are the real prize — a warm audience gated mainly by access and demand confidence, not by doubts about the destination.

Q: Do you currently offer tours in Greenland?
Base: All respondents who answered (n=224). Source: 2026 Greenland Destination Perception Survey

# Reasons to Offer Itineraries in Greenland

Respondents who offer Greenland, or plan to, are drawn above all to its nature and adventure activities, followed by culture and the chance to interact with locals. Wellness and gastronomy are not as prominent.



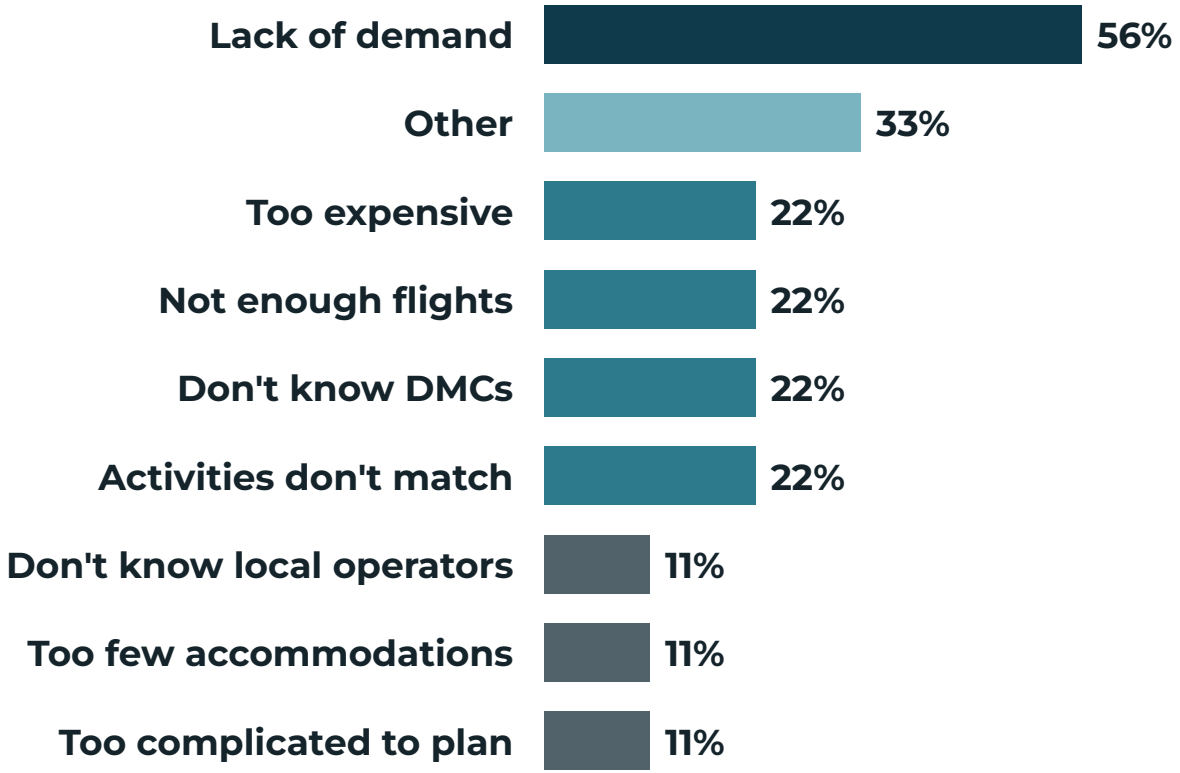

### "Other" Responses

- Expedition / cruise add-ons
- Northern Lights
- Science, education & climate
- Off-the-beaten-path uniqueness

Q: Why would you offer tours to Greenland in the future? (select all that apply)
Base: Respondents who offer or intend to (n=215). Multiple answers allowed. Source: 2026 Greenland Destination Perception Survey

# Reasons Not to Offer Itineraries in Greenland

The main reason is a perceived lack of client demand, followed by cost, flight access, and not knowing local DMCs or operators. Notably, no one cited distance, safety, language or guiding quality.




**Small base — read with care**

Only 9 respondents firmly ruled out Greenland, so each is worth ~11 percentage points. The signal that holds: barriers are commercial and logistical, never reputational.

*Not cited by anyone (0%): too far, language barriers, no quality guides, doesn't seem safe, not premium enough.*

Q: Why would you NOT offer tours to Greenland in the future?
Base: Respondents who do not offer and do not intend to (n=9). Source: 2026 Greenland Destination Perception Survey

# Rating Greenland's Adventure Travel

Operators rate the on-the-ground product solidly; guides and innovation score highest. International flights and consumer demand rate lowest and are seen as needing improvement. *Ratings are out of 10.*

| | | |
|---|---|---|
| **7.9** Innovation in activities | **7.9** Guides | **7.5** Local activity companies |
| **7.1** Local DMCs | **6.7** Accommodation | **6.6** On-the-ground transport |
| **6.4** Value for money | **5.6** International flights | **5.6** Consumer demand / volume |

Q: Rate the following aspects of Greenland adventure tourism from poor to excellent.
Base: Operators who offer or intend to ('unsure' excluded; n=97–147 per item). Source: 2026 Greenland Destination Perception Survey

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# Access Is Changing

Air access is the survey's single biggest barrier — international flights are the lowest-rated aspect (5.6 / 10) and a recurring reason North American intent isn't converting. But Greenland's connectivity is being transformed right now, reframing the barrier as a solvable, time-sensitive opportunity.

**Nov. ‘24**

Nuuk international airport opened

**Apr. ‘26**

Qaqortoq airport opened

**2026**

Ilulissat airport opening

### Why it matters for this report

North America is the largest, least-converted market (64% intend to offer trips to Greenland but haven't developed itineraries). New jet-capable airports and the first direct U.S. route (Newark–Nuuk) directly address that barrier. The window to convert the warm pipeline is opening now; messaging and trade tools should lead with improved access.

Air-access developments: Visit Greenland (visitgreenland.com), updated April 2026
Survey figures: 2026 Greenland Destination Perception Survey

# Rating Greenland's Product and Operators

Respondents who have worked in Greenland rate both the destination product and the operators positively (6.65 and 6.81). Operators edge slightly ahead, but both leave room for product development and training.

**6.65**

**Destination Products**

out of 10

**6.81**

**Operators**

out of 10

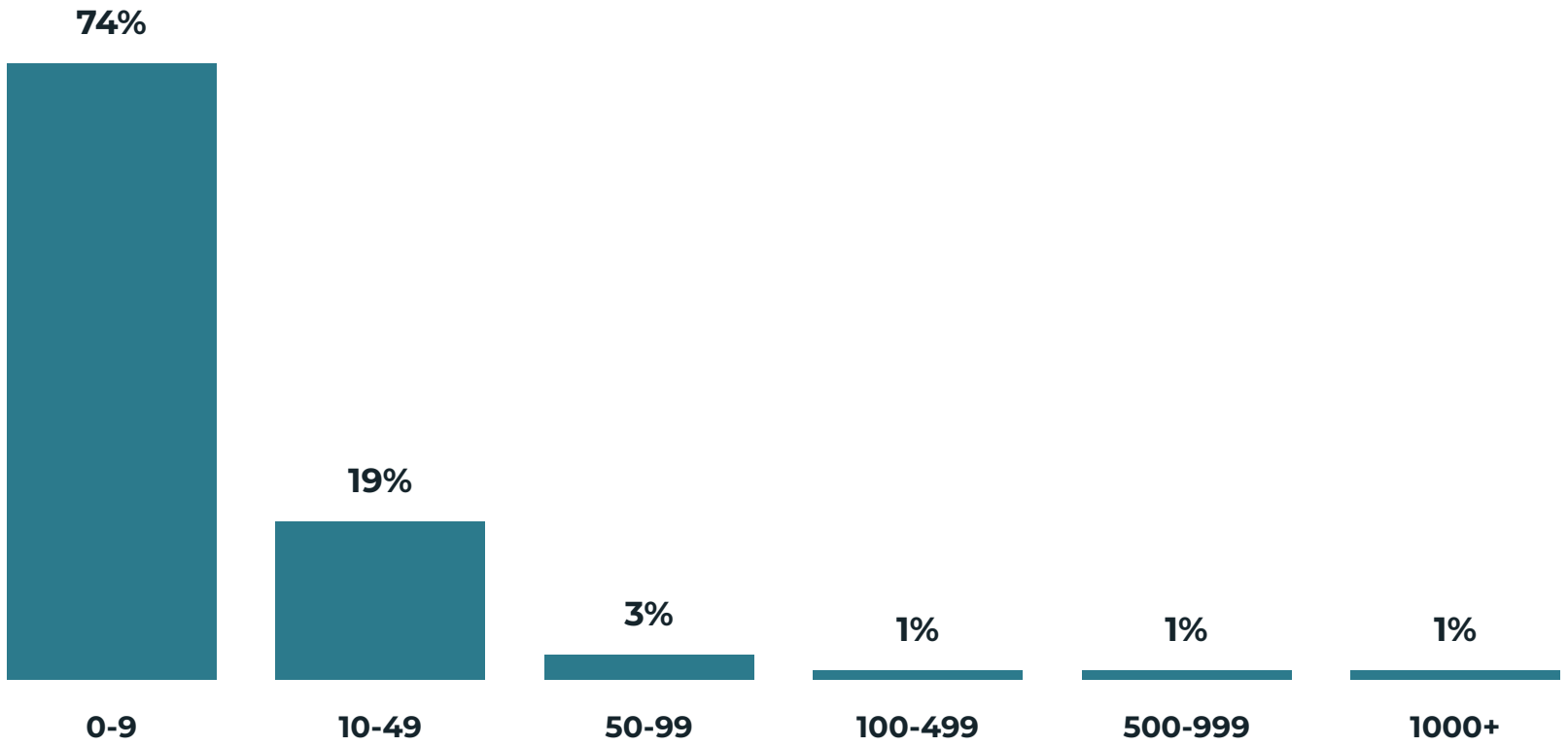
## Takeaway

Solid but mid-range scores point to an opportunity for training and product development to better serve the adventure segment.

Q: Rate the overall quality of the Greenland adventure tourism product and operators you have worked with.
Base: Respondents who rated product / operators (n=72). Source: 2026 Greenland Destination Perception Survey

# Client Demand for Greenland

In a successful year, 74% of respondents send fewer than 10 clients to Greenland and 93% fewer than 50. On a 1–10 scale of popularity versus their other destinations, Greenland ranks low at 3.1, as a niche, emerging destination.




*Clients sent per successful year*

**Popularity vs other destinations**

**3.1**

out of 10

*1 = least popular* *10 = most popular*

Q: Clients sent to Greenland in a successful year / ranked demand vs other destinations.
Base: Respondents who answered (n=72). Source: 2026 Greenland Destination Perception Survey

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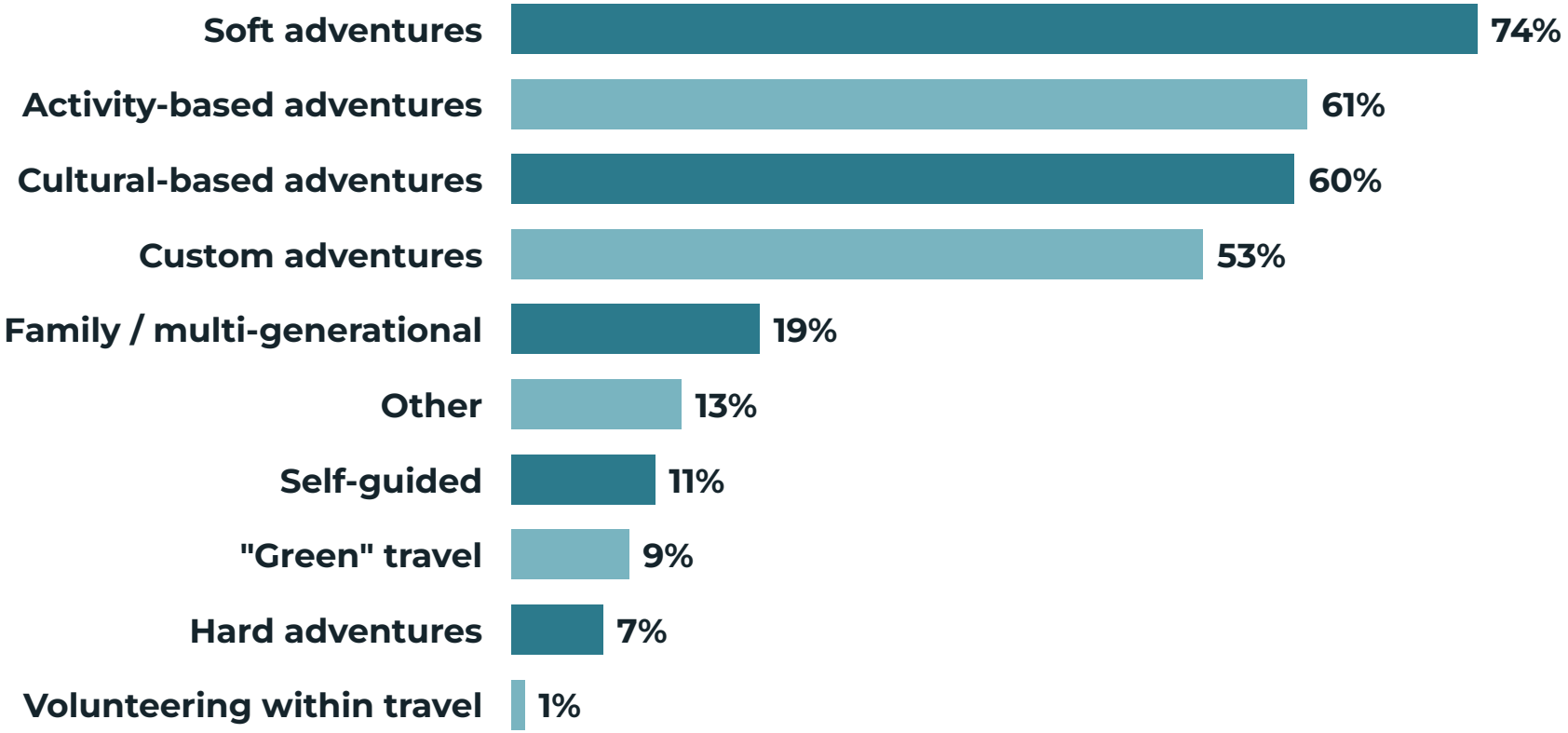
# Greenland Itineraries Offered

Among operators who currently sell Greenland, soft adventures lead, followed by activity-based and cultural adventures. Hard adventures and volunteering are least common — Greenland is sold as accessible, not extreme.




*Respondents could choose more than one answer.*

Q: Types of trips currently offered on your Greenland itineraries (select all that apply).
Base: Respondents who currently offer Greenland (n=70). Source: 2026 Greenland Destination Perception Survey

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# Working With a DMC in Greenland

Just under half of operators (44%) work with a DMC in Greenland; a quarter go directly to local providers. A notable 31% use other arrangements — most often booking through expedition cruise operators.

**44%**

Work with a DMC

**25%**

Go directly to local providers

**31%**

Other arrangements

### "Other" Responses

- Expedition / cruise operators (most common)
- Tour operators or wholesalers
- A mix of both DMC and direct
- Haven't found a DMC yet — would like to

Q: Do you work with a DMC in Greenland?
Base: Respondents who currently offer Greenland (n=72). Source: 2026 Greenland Destination Perception Survey

# A Cruise-Led Market

Today Greenland reaches most travellers through expedition cruise. Land-based and independent (FIT) travel remains underdeveloped, showing a clear product-development and conversion opportunity rather than a demand problem.

**31%**

of operators book via "other" channels — most commonly expedition cruise operators

**74%**

send fewer than 10 clients a year — consistent with low-volume cruise day-calls

**3.1 / 10**

demand vs other destinations — niche, not yet a land-based volume market

## What it Means

- Cruise delivers visibility but low local value capture and short, shore-side day-visits.
- Land-based, multi-day itineraries are where higher value and longer stays sit, and where buyers say they lack product and partners.
- The gap is product knowledge and connections, not destination appeal.

## The Opportunity

- Build and showcase land-based itineraries beyond the cruise shoulder.
- Connect buyers to vetted local DMCs, suppliers and guides (the #2 requested resource).
- Use FAM tours (the #1 ask) to convert cruise familiarity into land-program sales.

## In their words:

"Greenland is known as a cruise destination... there's a lack of knowledge about land excursions."

*- survey respondent*

Q: Do you work with a DMC in Greenland?
Base: Respondents who currently offer Greenland (n=72). Source: 2026 Greenland Destination Perception Survey

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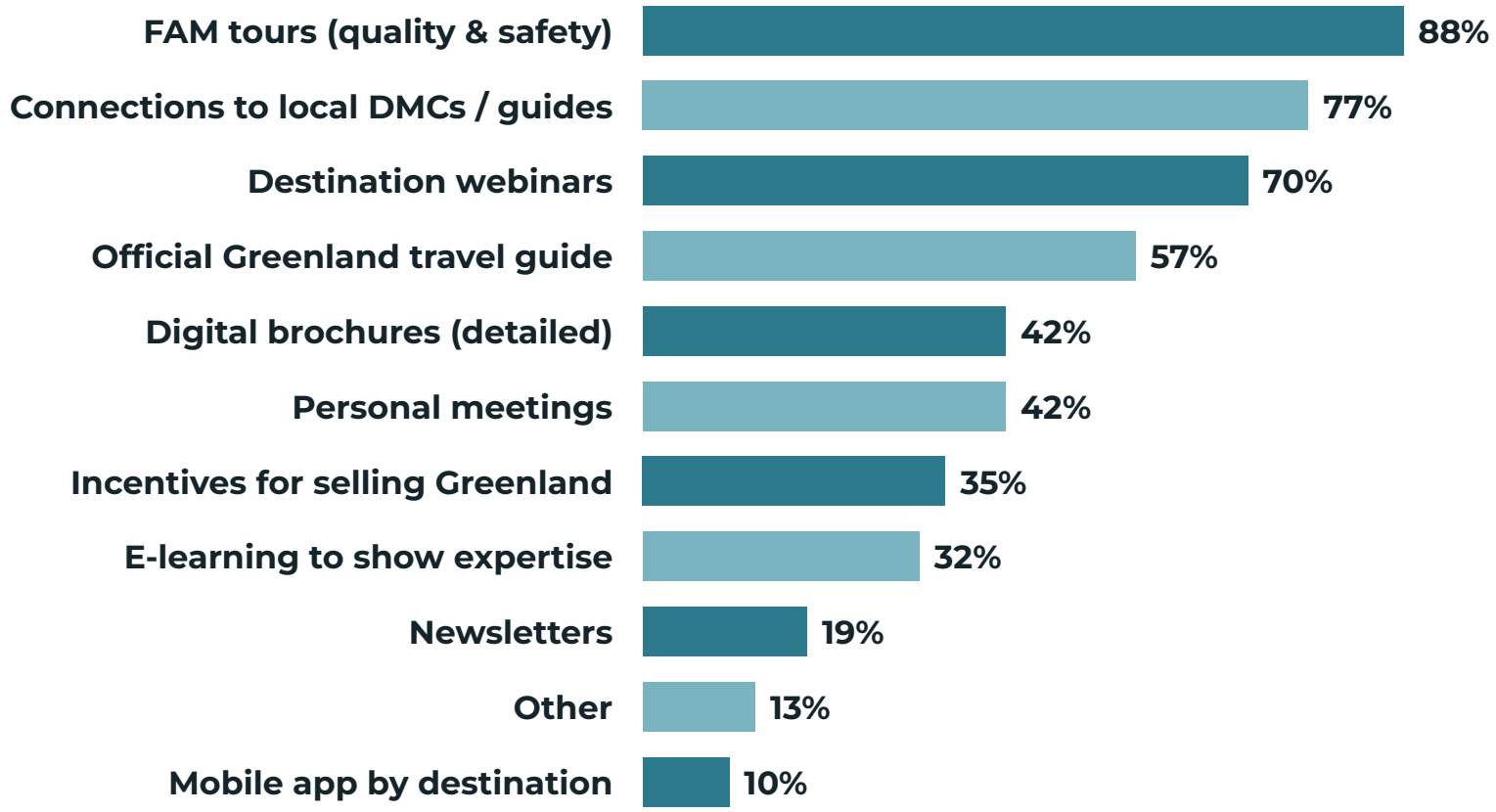
# Part V:

## Promoting Greenland

Photo by Norris Niman - Visit Greenland

# Tools and Resources to Promote Greenland

FAM tours are by far the most desired resource — buyers sell what they've seen first-hand. Connections to quality local partners and destination webinars follow, with an official travel guide also widely requested.




## "Other" Responses

- Help with air access & flight logistics
- Marketing imagery, video & social content
- Sample itineraries with pricing
- FAM trips & sales incentives / leads

Q: What tools and resources would help you promote & sell Greenland? (select all)
Base: All respondents who answered (n=203). Multiple answers allowed. Source: 2026 Greenland Destination Perception Survey

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# Part VI:

## Further Analysis & Closing

Photo by Alex Savu - Visit Greenland

# Regional Focus: North America HQ

North America is two-thirds of the sample, so the global headline numbers are essentially North American numbers. It is also the least-converted region, with a large warm pipeline yet to book.

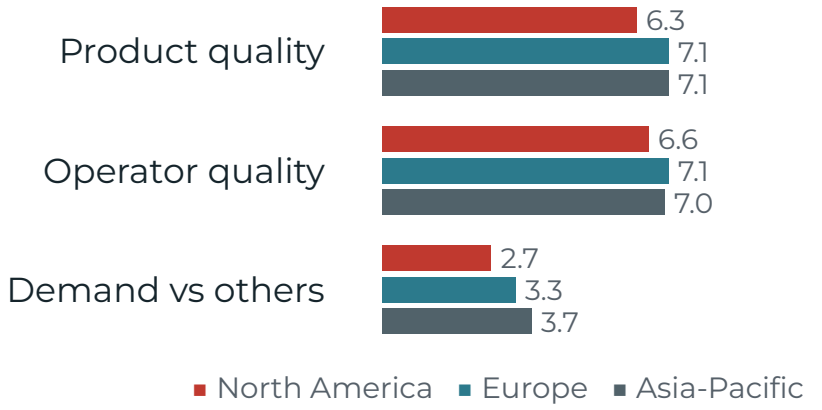
**150**
answered this question
(of 159 N.A. respondents)

**30%**
already offer Greenland

**68%**
intend to (not yet)

**2%**
will not offer

### How regions rate Greenland (out of 10):




### The conversion gap

North America's low scores track to one issue raised repeatedly: **air access**. Indirect routing via Copenhagen or Iceland and no direct U.S. West Coast flights are the main blockers to converting intent into bookings.

# Regional Focus: Europe HQ

Europe is the most experienced large market and rates Greenland highly, but it's the only region where a meaningful minority has actively ruled it out.

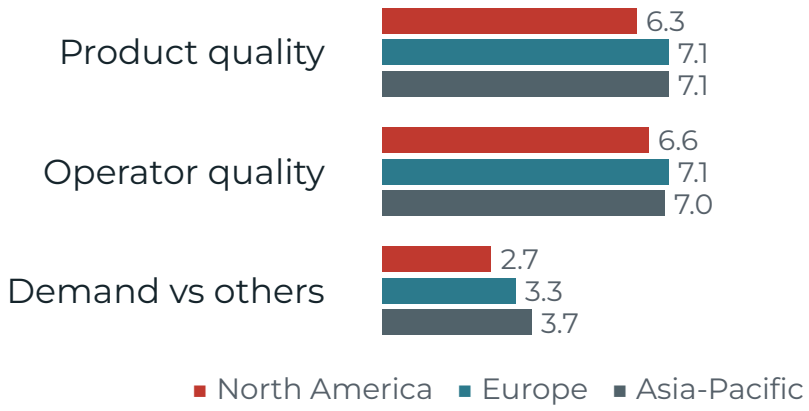
**45**
answered this question
(of 50 Europe respondents)

**42%**
already offer
(highest)

**45%**
intend to
(not yet)

**13%**
will not offer
(highest)

### How regions rate Greenland (out of 10):




### The mature market

Proximity, the Danish link, and established **expedition-cruise channels** make Europe the most experienced market. The opportunity is deepening existing relationships rather than building awareness from scratch.

# Regional Focus: Asia-Pacific & Other Markets

These regions should be read with caution given small samples, but the patterns point to a clear segmentation strategy for conversion.

## Asia-Pacific (n=22): High Conviction

The most committed profile: 50% already offer, 50% intend, none reject it, and it posts the highest demand ranking (3.7). Distance limits casual interest, but those who engage (led by Japanese expedition specialists) are serious niche players.

## Latin America (n=7): Aspirational

Almost entirely intent: 83% intend to offer Greenland but only 17% currently do. High curiosity, very little operational experience or access so far.

## Africa (n=4) & Middle East (n=2)

Too small to generalize, but both skew enthusiastic — the highest attractiveness scores in the dataset (8.75 and 9.0).

## Strategic Takeaway: Segment Conversion:

**North America** = large, warm, under-converted, gated by air access
**Europe** = mature, deepen relationships
**APAC** = small but high-conviction niche to nurture

Base: All respondents (n=244); Source: 2026 Greenland Destination Perception Survey

# Closing Comments

## Significant Untapped Potential

Although only 34% of respondents currently offer tours to Greenland, another 62% intend to, indicating significant untapped potential for the adventure travel segment. Soft, activity-based and cultural adventures are most popular on Greenland itineraries. Kayaking, glacier trekking, dog sledding and wildlife viewing are the activities most associated with Greenland, alongside the feel of a remote, ice-shaped wilderness still largely undiscovered.

## What Buyers Need to Sell Greenland

FAM tours are by far the most requested resource, as buyers are most comfortable recommending destinations they have visited first-hand. Buyers also want connections to quality local DMCs, suppliers and guides, plus destination webinars and an official Greenland travel guide.

## Closing the Awareness Gap

Top barriers to offering Greenland are a perceived lack of client demand and not knowing which local operators and DMCs to work with. The ATTA can help bridge this through events such as webinars or an AdventureWEEK / AdventureFAM, and through DMC and operator representation at marketplaces like AdventureELEVATE North America, building awareness and first-hand familiarity.

## Reframing Remoteness

On air access, Greenland's lowest-rated aspect, the task is twofold: ease the practical friction of getting there, while reframing that very remoteness as the core appeal. The fact that the crowds cannot easily reach Greenland is what makes it special, offering space, solitude, and an untouched Arctic experienced fully. Positioned this way, "remote" shifts from obstacle to reason to go.

# ABOUT THE ATTA

Established in 1990, the Adventure Travel Trade Association is the largest global network of adventure travel leaders. Our community is made up of ~30,000 individual guides, tour operators, lodges, travel advisors, tourism boards, destination marketing and management organizations, outdoor educators, gear companies and travel media who share a belief and commitment to sustainable tourism. The connections and creativity of this vibrant community come together both virtually and in person to create and deliver the solutions that propel our businesses and our communities toward a responsible and profitable future.

# ABOUT OUR RESEARCH

The ATTA strives to produce regular reports that take the pulse of the industry through our membership as well as the global travel industry. In addition, consumer research studies lend insight into the fast paced and changing world of travel and travelers' perceptions of it. At adventuretravel.biz, our Research Reports can be located that dive deeply into the motivations of adventure travelers, the size of the industry, the landscape and health of the industry at large, as well as other targeted reports on subjects ranging from Travel Agents to adventure travel in specific destinations.

# THE ATTA'S WEB PROPERTIES

**ADVENTURE TRAVEL**
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The ATTA's homepage online at adventuretravel.biz

**ADVENTURE**
Travel News

The adventure travel industry's source of trade news online at adventuretravelnews.com

**ADVENTURE**
.TRAVEL

The traveler's guide to finding adventure at adventure.travel

**ADVENTURE**
HUB

ATTA's Online Members Community at members.adventuretravel.biz

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Photo by Alex Savu - Visit Greenland