Tourism Statistics Report 2019 Greenland

VISIT greenland

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Executive Summary

The tourism development in 2019 is characterized by indicators pointing in both a positive and a negative direction – as has been the case in previous years.

On the one hand there has been a double digit growth in the number of international (incl. the DK segment) overnight stays and guests as well as a 2% growth in the number of cruise passengers – while on the other hand there was a decline of -1.3% in the number of international flight passengers (incl. the DK segment).

2019 was a year of significant growth in the number of Danish guests and overnight stays in accommodations that submit registrations – despite of the status quo in the number of Danish flight passengers with a 0.2% growth).

In practicality this must mean that a far greater share of the tourists that visited Greenland in 2019 has chosen to stay at a hotel than was the case in 2018. It is likely that these are mainly business tourists in connection with the airport package and the purchase offer made by President Trump – factors that have probably called for more meetings and conferences with participants from Denmark than usual.

If one excludes the Danish guests from the overnight stay statistics, there is a combined decline in international guest which naturally is somewhat concerning. Visit Greenland conducted a survey among the 300 tourism operators in Greenland to learn how their 2019 tourist season has been, and a little over half responds that they have seen growth. Approximately a quarter of them have experienced neither growth or a decline, and the remaining quarter of respondents have seen a decline.

Thus, the available data does not give unambiguous indicators, but we must once again relate to a mix of both positive and negative indicators.

However, one thing that is quite clear is the development in Iceland over the course of 2019, where there has been a significant decline. With the bankruptcy of WOW Air in March the accessibility to the volcanic island significantly deteriorated as other airlines were unable to establish enough new routes to offset the end of the WOW Air routes.

It cannot be directly and unambiguously stated that the decline in Iceland has negatively affected the development in Greenland, but it cannot be rejected either.

In November Visit Greenland conducted a telephone-based survey among the general population in relation to their view on tourism. The respondents were only recruited in the cities of Ilulissat, Sisimiut, Tasiilaq and Qaqortoq as well as the settlements Ilimanaq, Ukkusissat, Itilleq, Qassiarsuk/Igaliko and Kulusuk – this due to the fact, that these locations see quite a lot of tourism activity.

As it turns out the population is quite positive when it comes to tourism with between 86-96% positive answers depending on the question. In general, the population is slightly more positive towards land-based tourists than cruise guests.

As we look toward the 2020 tourism season, in Q2-20 we unfortunately already have to conclude that due to the outbreak of the covid-19 pandemic 2020 will be a year with a very large negative impact on the tourism in Greenland – and across the world.

Introduction

After some years where it has been a challenge for Statistics Greenland to receive all cruise port call registrations, it is gratifying that they were able to publish cruise data on 2019 in February 2020.

There are, however, still significant challenges when it comes to receiving complete overnight stay data from region East Greenland, where 71.5% of the guests were not registered according to nationality. It is positive that a new tourism bill has been submitted for consultation, and, if passed (the vote is currently postponed to the autumn), it will give an unequivocal legal basis to demand all tourism operators (incl. accommodations) to hand over relevant data.

Besides, the law will, if passed, gives the Government of Greenland the legal basis to set up digital equipment to register the country of residence of flight passengers, so that registration can be complete, as the current registration solution, for a variety of reasons, has never become 100% reliable.

It is positive that we can now show data that includes 29 segments for the overnight stay statistics and 30 segments for the flight passenger statistics. The two data series published at bank.stat.gl/tuehot and bank.stat.gl/tuefly, contain fewer segments. This is because the extra segments were only registered since the 1st of January 2016, and thus cannot be mixed into a data series with data dating back to 1994 and 2014, respectively.

The data series bank.stat.gl/tuehot contains the 15 segments: GL, DK, NO, SE, IS, DE, FR, IT, NL, GB, Other Europe, US, CA, JP and Other Countries.
The new segments in the overnight stay statistics are; AT, CH, PL, ES, CN, HK, AU, KR, MY, ID, RU, TW and Other Asia.

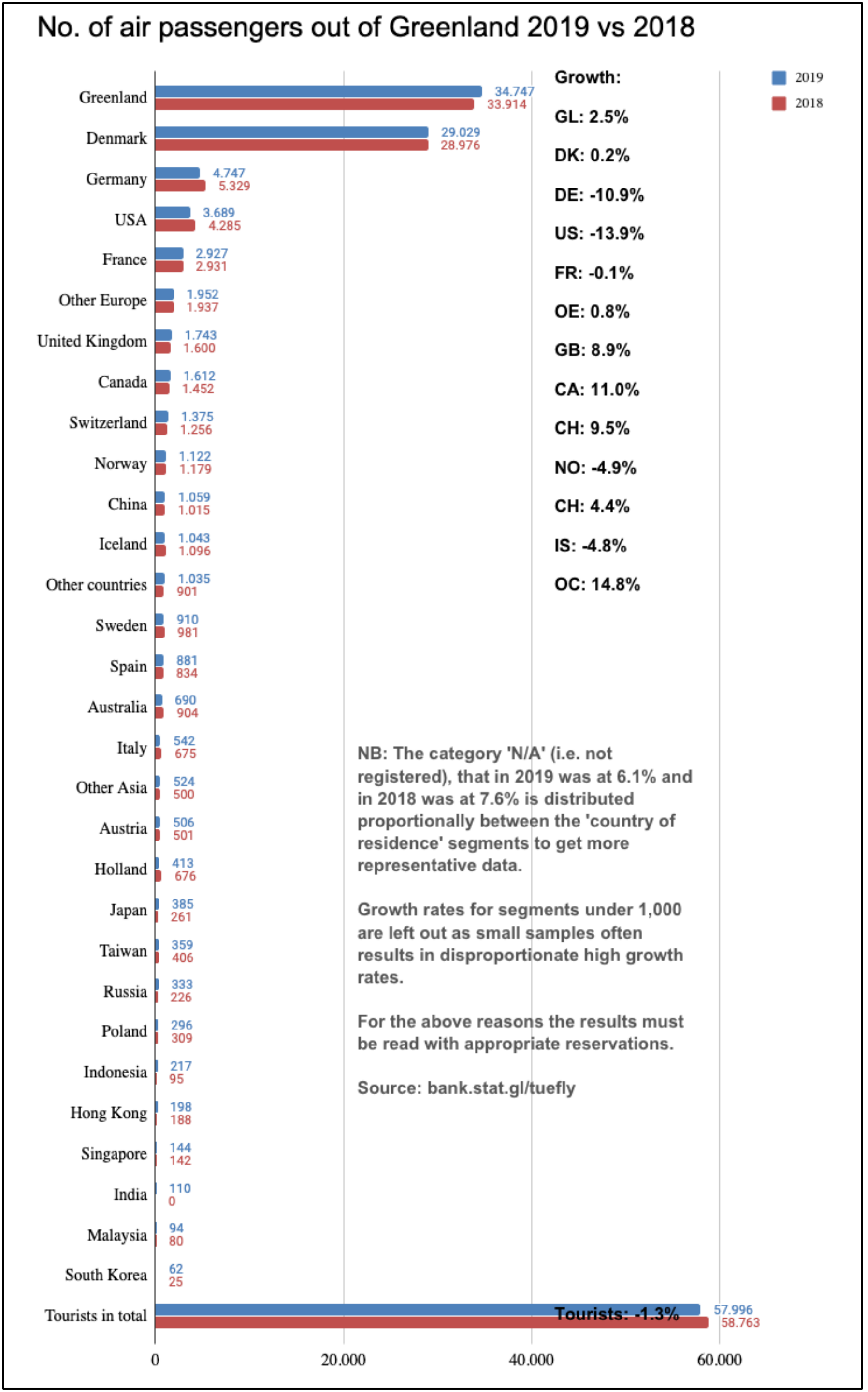
The data series bank.stat.gl/tuefly contains the 18 segments; GL, DK, Other Europe, IS, NO, SE, DE, FR, IT, ES, GB, RU, US, CA, CN, JP, TW and Other Countries.
The new segments are AT, CH, PL, HK, AU, KR, MY, ID, RU, TW and Other Asia.
Since the 1st of January 2019 IN has been added.

It is likely that at some point new data series will be created where all the segments will be available on bank.stat.gl.

The construction of the 2 new Transatlantic airports in Ilulissat and Nuuk are ongoing and the construction of the airport in Qaqortoq will begin over the summer. At present Kalaallit Airports is on schedule and expect to be operational in the autumn of 2023. For the tourism it will be a significant gamechanger, as it will significantly increase accessibility to Greenland and likely reduce the airfares quite a bit.

At other places in the world an increased accessibility has had a stimulating effect on demand, which for example was the case when Vagar Airport at Faroe Islands extended the runways in 2011 and installed modern approach systems (ILS and RNP). Not only did this significantly increase regularity and provide the opportunity to cater to larger aircraft – it also resulted in a double-digit annual growth in the number of passengers in the years that followed.

Despite the separation of the former Qaasuitsup Municipality to Avannaata and Qeqertalik (North Greenland) the two municipalities are still linked in relation to tourism statistics, as these are data series dating back many years. However, it is likely that over time a new parallel data series will be created in which the two municipalities are separated. At present there is no set date for this.



Flight Passenger Statistics

For the first time we not only deal with the 19 segments (GL, DK, DE, US, FR, CN, OE, GB, CA, NO, AL, IS, SE, ES, IT, JP, TW, RU and Unknown) that are included in the bank.stat.gl/tuefly data series, but include all 30 segments that are registered on iPads in the 6 airports in Greenland that have international departures.

With a negative growth of -1.3% in international flight passengers (incl. DK) the result for 2019 is initially disappointing after a period since 2014 with an almost constant growth in the number of international flight passengers. The number of passengers that do not reside in Greenland, however, does not tell the entire story about the tourism development. It is important to view the tourism development in a broader perspective, in which the number of international overnight stays/guests as well as cruise passengers also very much count.

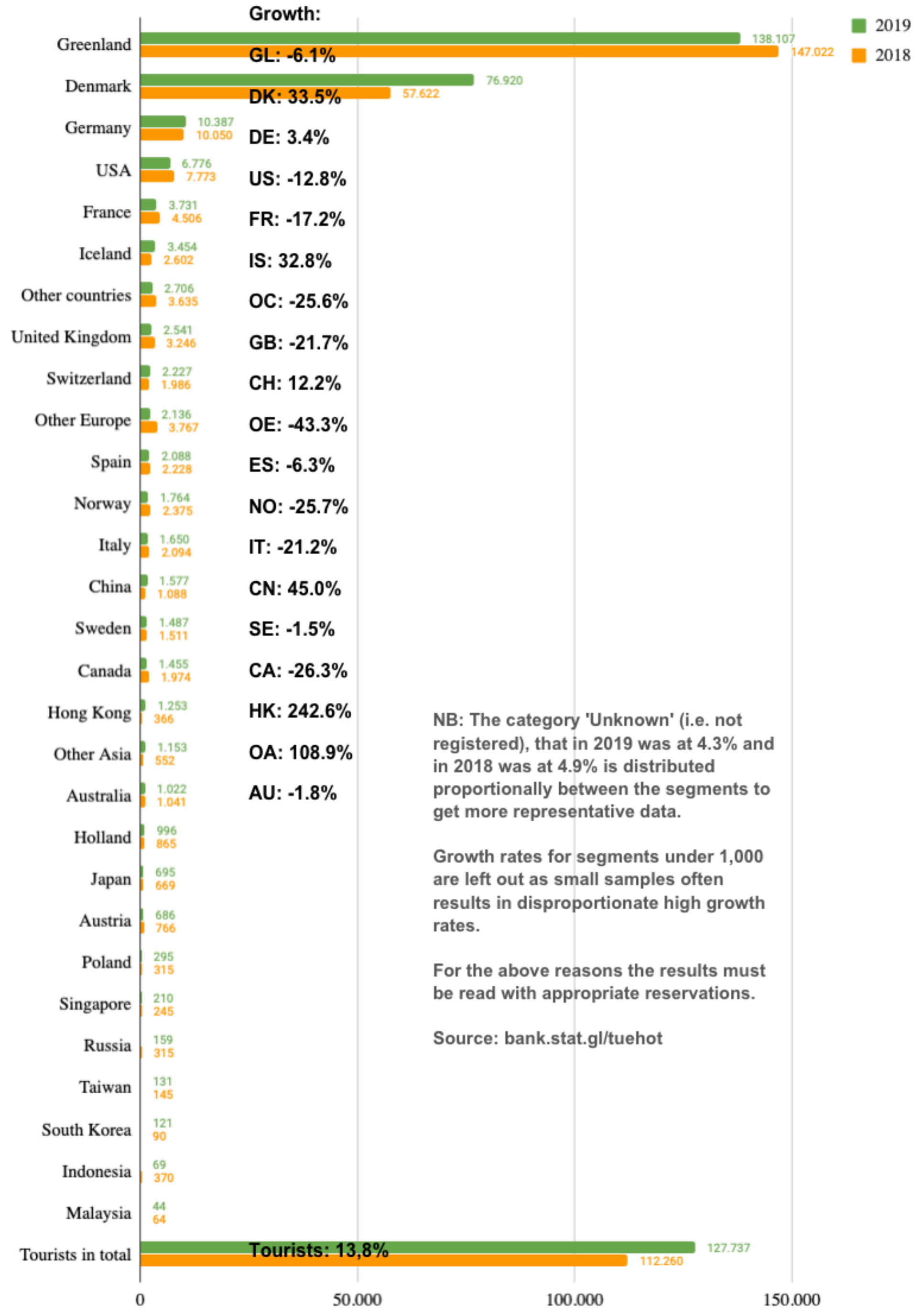
Normally Visit Greenland focuses on the 5 core markets Denmark, Germany, North America (US & CA), France and Great Britain.

Most of the secondary markets represent less than 1,000 persons, which so far means both that there is not a particular focus on them, but also that the small samples would cause a disproportionate growth percentage fluctuation by only 50 or 100 persons more or less from one year to the next. This makes a statistical analysis difficult.

The core markets with the biggest negative growth are Germany (-10.9%) and USA (-13.9%). This does make one evaluate the marketing efforts in the two markets as well as what other factors may have affected demand negatively.

It is interesting to see how the ‘new’ segments (i.e. the segment that we now have data on for the first time) are placed compared with the ‘old’ segments. The largest new segment is Switzerland, which is number 7 of the tourist segments with 1,256 pax in 2018 and 1,375 pax in 2019. What is positive about Switzerland (and Austria) is that we can use our German version of visitgreenland.com to connect with them.
Australia – with 904 pax in 2018 and 690 pax in 2019 – is certainly also a segment that we must pay close attention to from now on.

No. of overnight stays in accommodations in Greenland 2019 vs 2018



Overnight Stay Statistics – Number of Nights Sold

In relation to the national overnight stay number one must bear in mind that nationality was not registered for 53.3% of the overnight stays in East Greenland making that the single largest source of error in the data. In a national perspective this corresponds to 4.3% of the overnight stays in 2019 and 4.9% in 2018 were not registered. Though there is a growth in the tourist segments combined, it is largely only the growth of a staggering 33.5% in the large DK segment that makes the overall growth positive. Without the DK segment the growth in international overnight stays is -7.0%.

Thus, there is a large discrepancy between the flight passenger numbers that have been status quo for the DK segment (0.2% growth).

One explanation may be that DK tourists in 2019 have had a higher tendency to purchase overnight stays than in 2018, which may indicate that it is due to a growth in the activity level for business travellers from DK, as they almost always spend the night in hotels.

We know that in 2019 there has been some activity in both business and the civil service in relation to both the new airports and President Trump's purchase offer. This may well have been decisive.

It is worrying to see double-digit negative growth rates for core markets US (-12.8%), FR (-17.2%), GB (-21.7%) – as well as Other Europe (-43.3%) and Other Countries (-25.6%). The core market DE is status quo with a growth of 3.4%.

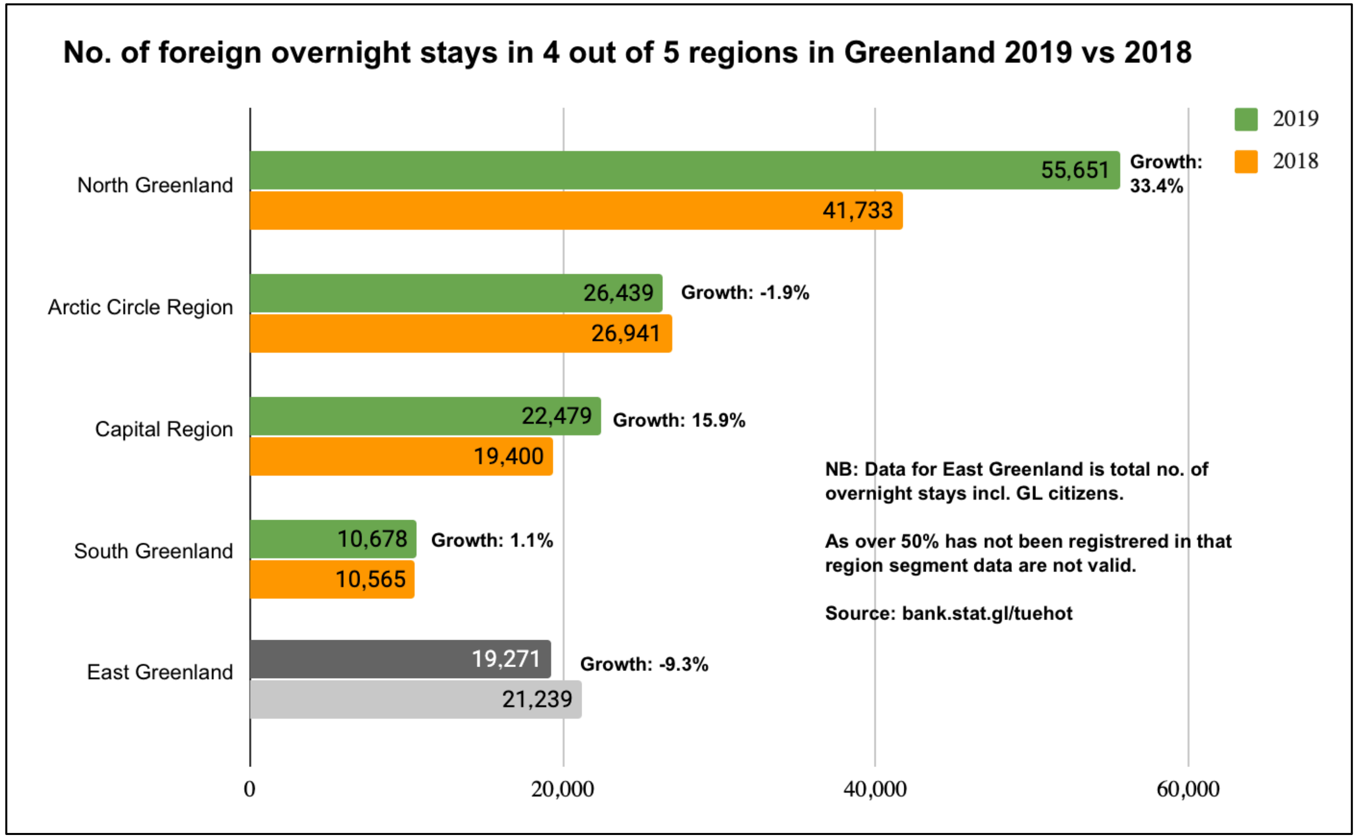
In the flight passenger data series at bank.stat.gl/tuefly China, Russia and Taiwan have figured since 2015, but only now in the overnight data.

It is interesting to see the 'new' segment Switzerland (that cannot be found in either the bank.stat.gl/tuefly or the bank.stat.gl/tuehot data series) as the 8th largest nationality segment. Hong Kong is the 15th largest nationality segment ahead of 'old' segments such as Holland and Japan.

Number of Foreign Overnight Stays in 4 out 5 Regions – 2019 vs 2018

If the DK segment is left out there has been a negative growth of -7.0% in the number of international overnight stays on a national level. In data on the number of international overnight stays at a regional level the significant growth of 33.5% for the DK segment is first and foremost attributed to North Greenland and Capital Region, as is also shown in the graph below.

In 2019 North Greenland saw a growth of 59.2% for the DK segment. The number for Capital Region was 32.7% while it was 8.4% Arctic Circle Region. Statistics Greenland also publish data on Ilulissat alone that shows a growth in the DK segment of a staggering 70.8%. As Capital Region in reality, only covers data for Nuuk, we can conclude that the growth in the DK segment first and foremost can be attributed to Ilulissat and Nuuk – as well as Arctic Circle Region but to a smaller extent.



As noted in the graph we cannot allocate nationalities for East Greenland as more than 50% of the overnight stays have not been registered by nationality, thus the total number of overnight stays incl. GL citizens is shown.

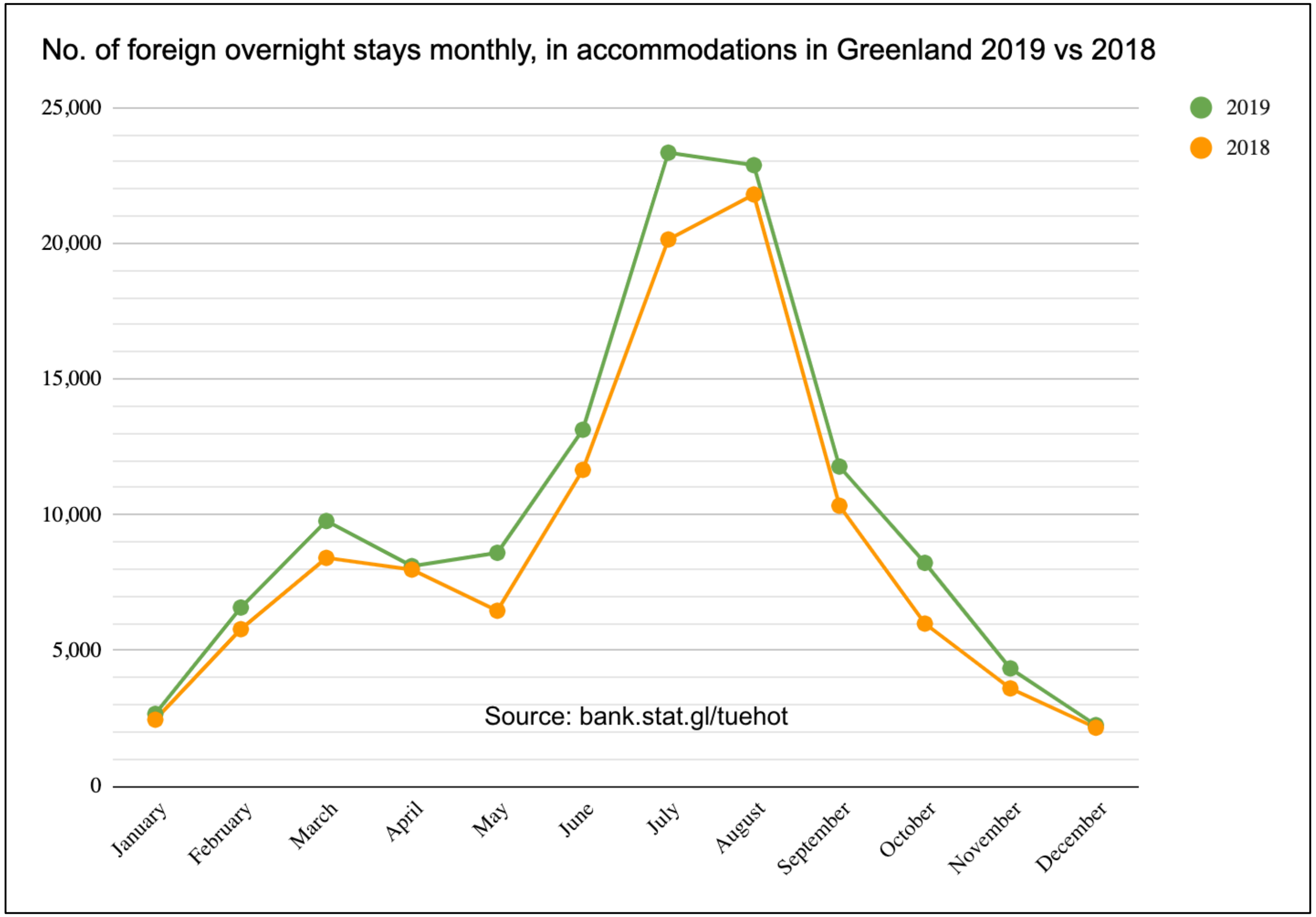
Based on the overnight stay data with registration according to nationality, the data at hand indicates a negative growth of approximately -10%.

Of the significant growth rates based on data on a regional level in relation to the core markets DK, DE, FR, GB and the US the following double-digit growth rates (negative as well as positive) can be highlighted:

- North Greenland: US (-33.0%), GB (-44.9%)
- Arctic Circle Region: DE (54.1%) GB (26.8%)
- Capital Region: DE (-29.7%) and US (15.2%)
- South Greenland (-27.6%), FR (-19.4%) and US (11.7%)

Overnight Statistics – Season Trend

The graph below shows the seasonal variation pattern for the number of international overnight stays (incl. DK) for the past two years. Both years see a rather significant 'peak' trend in the summer months June through September, a small secondary 'winter high season' in the spring and an otherwise quite low activity in the off-season from November through February.

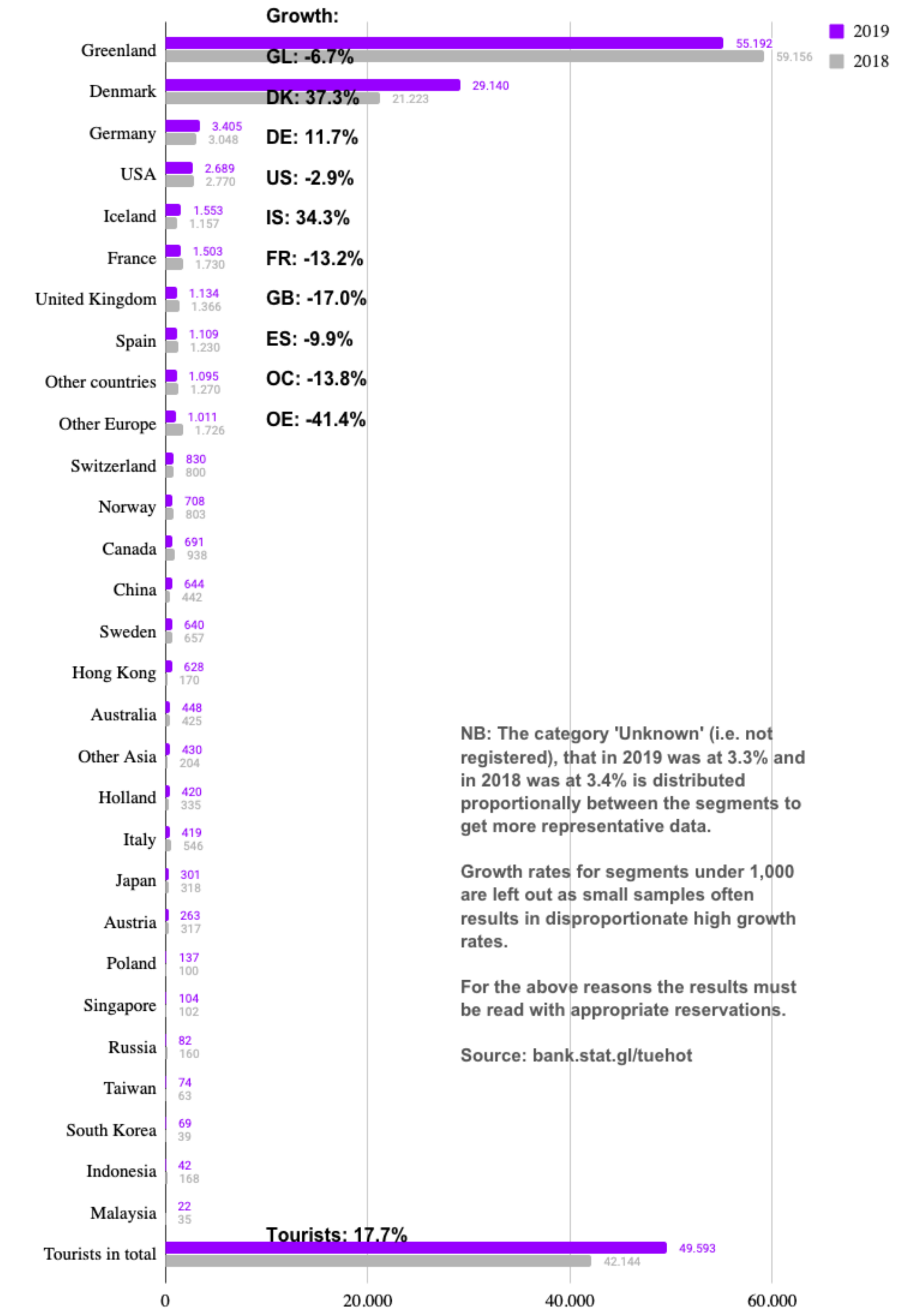


However, there is a positive development in most months of 2019, but from the previous slides we know that this is mainly contributed to a large growth in the DK segment in Ilulissat and Nuuk.

Unfortunately, the distinctive pattern of a very dominant summer high season is characteristic of the tourism development for the past many years in Greenland.

In order to achieve a more sustainable tourism development it is necessary for the entire industry to work long-term and targeted to attract more tourists in the off-season – as well as in other regions than North Greenland, which in 2019 accounted for 110% more international overnight stays than the second largest destination Arctic Circle Region.

No. of guests in accommodations in Greenland 2019 vs 2018



Overnight Stay Statistics – Number of Individual Guests

As is the case with the number of international overnight stays the growth of 17.7% in the number of international guests is almost exclusively due to a significant growth in the DK segment of 37.3%. Without the DK segment there is a negative growth of -2.2% in the number of international guests.

There are double-digit negative growth rates for France (-13.2%), Great Britain (-17.0%), Other Countries (-13.8%) and Other Europe (-41.4%). The core market USA represents a small decline of -2.9%.

However, the growth is positive for Germany (11.7%) and Iceland (34,3%). As for the Iceland segment a large share of them are likely business travellers and not purely adventure tourism.

The accommodations that submit registrations to Statistics Greenland make up 76% of the total bed capacity in Greenland (that are registered as 'accommodation' in the Central Business Register). This means that there is an underreported number of tourists that spend the night in other accommodations than those that submit registrations, in open air and in private homes.

In 4 out of the 5 regions there has been an almost complete registration of nationality among the accommodations (that submit registrations). Here East Greenland stands out – as a staggering 71.5% of the guests have not been registered according to nationality. Thus, data on East Greenland are not statistically valid.

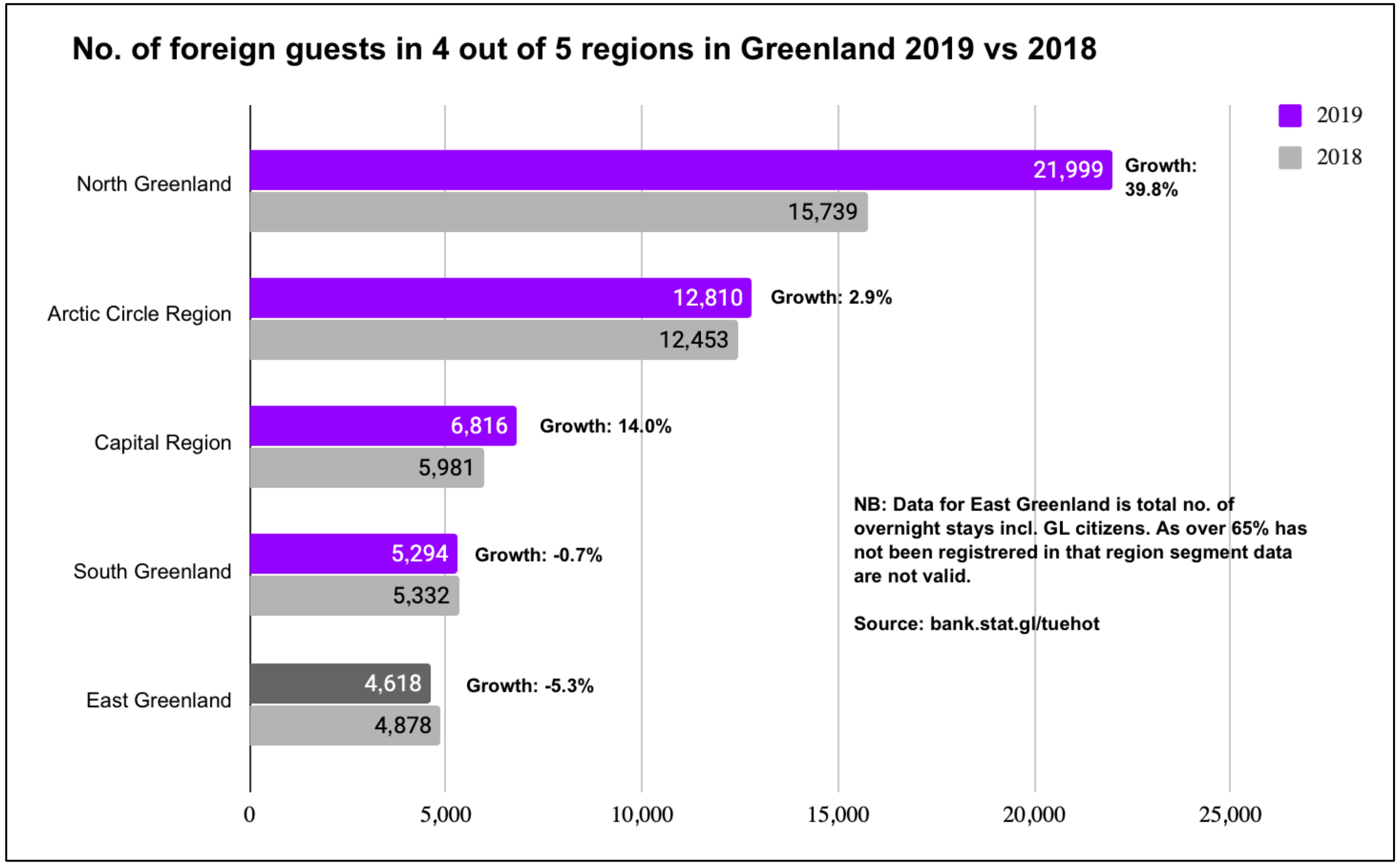
As was the case in the data on number of overnight stays the 'new' segment Switzerland is above 'old' segments such as Norway, Canada, Sweden, Holland, Italy and Japan.

If one adds all the Asian segments together (incl. Australia) their 2,315 guests in 2019 are just under USA in number, and from 2018 to 2019 saw a total growth of 50.3%.

Number of International Guests in 4 out 5 Regions – 2019 vs 2018

From the graph on the previous page we know that nearly all growth in relation to international guests nationally in 2019 is due to a growth of 37.3% for the DK segment. The graph below shows that in 2019 there was only growth in the number of international guests in the regions North Greenland (39.8%), Arctic Circle Region (2.9%) and Capital Region (14.0%).

If one looks deeper into the segment data on a regional level one can see that the DK segment saw a growth of 64.9%, 17.8% and 27.2% for North Greenland, Arctic Circle Region and Capital Region, respectively. If one excludes the DK segment the growth was 11.9%, -14.3% and -7.0% respectively, thus, it was only North Greenland that experienced growth in relation to guests from other countries than Greenland and Denmark.



So there have been especially many Danish guests at the accommodations in the three previously mentioned regions in comparison with 2018 – though there were just as many Danish flight passengers in 2019 as in 2018.

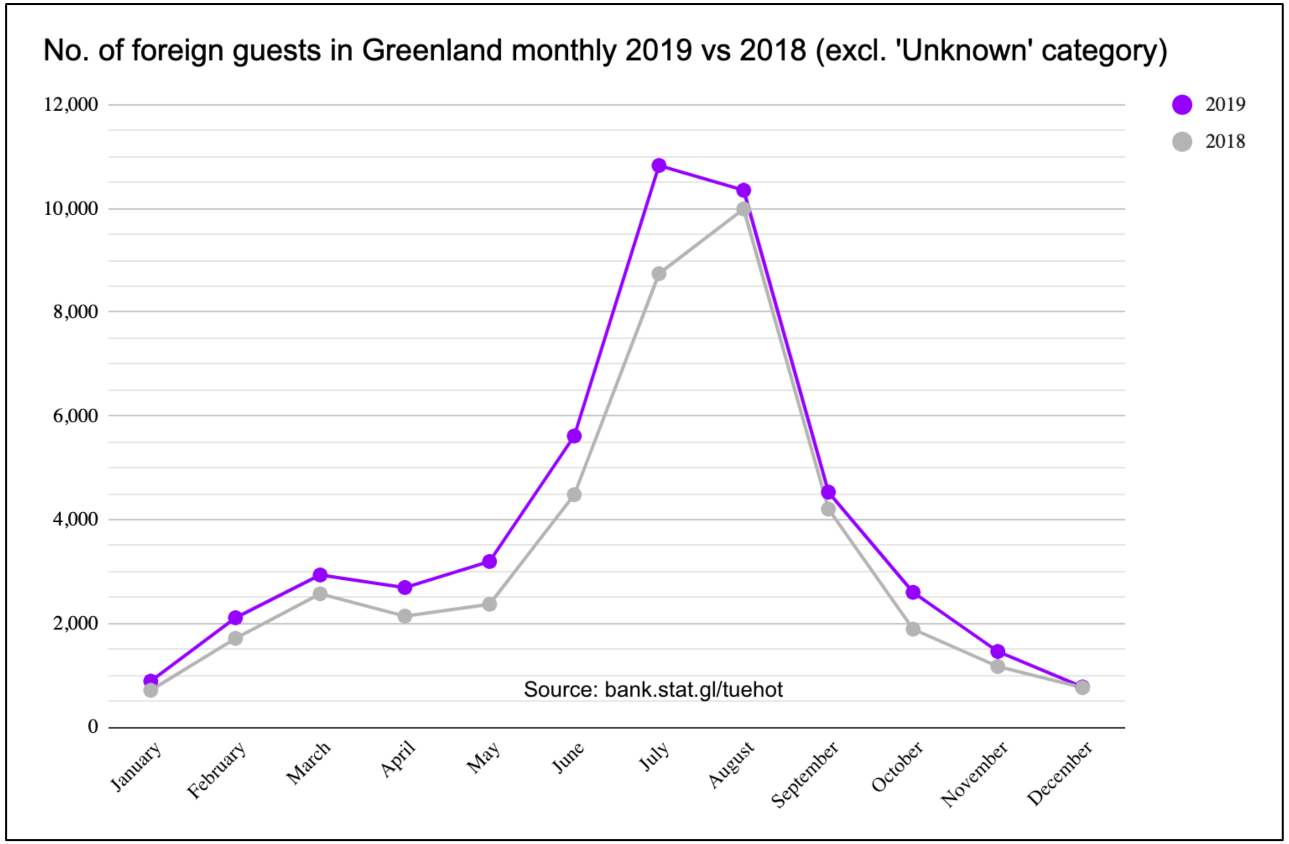
The most likely explanation of the large growth in the number of Danish guests in 2019 is that there has been extraordinarily many meetings, conferences or workshops with Danish participants at hotels in North Greenland, Capital Region and Arctic Circle Region .

As a rule, the hotels observe confidentiality when it comes to their guests, thus, we cannot verify this thesis, but it is likely that there has been an increase in business activity and activity in the public sector due to the approval of the new airport package as well as the purchase offer made by Trump.

Number of Guests – Season Trend 2019 vs 2018

The pattern in seasonal variation in relation to the number of international guests (incl. DK) looks like the pattern for the number of overnight stays for international guests on page 8, which is to be expected.

The average number of overnight stays per guest has changed from *2.6* in 2018 to *2.5* in 2019. The DK segment has gone from *2.7* in 2018 to *2.6* in 2019. This development is within the normal range.



The characteristic Mexican hat shape that the seasonal course has retained for the past many years indicates that the pattern of demand is somewhat stuck.

By now it is common knowledge that a more sustainable tourism development is characterized by a more flattened seasonal variance where the difference between summer and the other seasons is not so big.

To some extent Iceland has managed to create demand during the winter, especially in the GB segment, but unlike Greenland they have had the opportunity to create low-cost promotions on airline tickets and overnight stays in the traditional off-season – which is not so easy for Greenland, at we currently do not have any low-cost airlines flying Greenland.

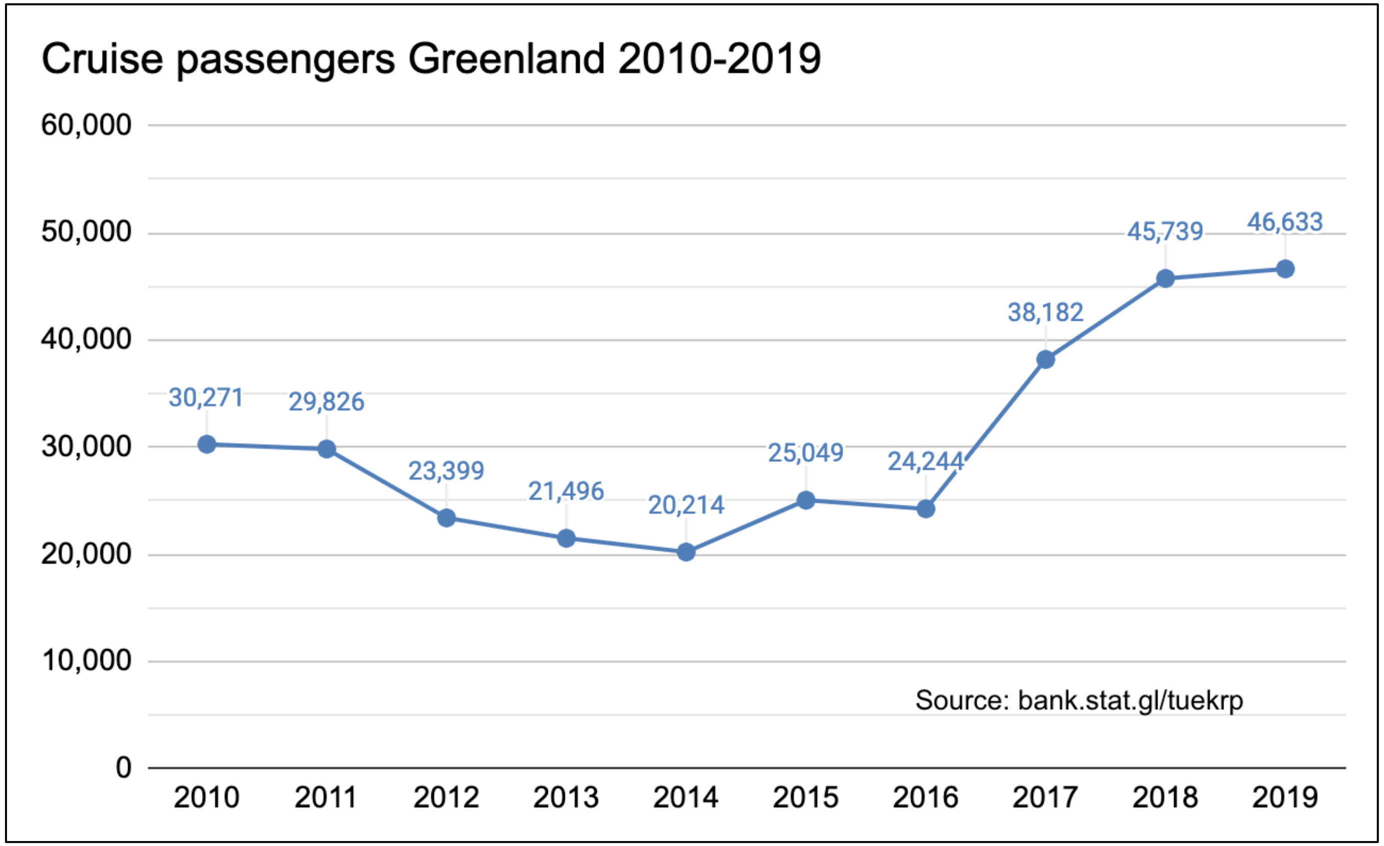
That is why it is important to market winter experiences that may increase demand on Greenland outside the summer high season. If the current airlines flying Greenland were to create discount promotions this would also stimulate demand.

As Greenland is a relatively small and new player in the international adventure tourism market it will take some years and a lot of marketing resources to stimulate demand.

Cruise Tourism – Number of Guests 2010-2019

The years 2016 to 2018 saw a double-digit growth rate in the number of cruise passengers, but from 2018 to 2019 the growth was a more modest 2.0%.

On the 1st of January 2016, the new cruise port charges were introduced which meant that rather than pay 525 DKK per passenger once, each port call is settled with a port charge of 1.1 DKK per gross tonnage. This has made it significantly cheaper for especially large ships to call on Greenland and has in some cases provided savings of up to 93% in port charges. This appears to have had a stimulating effect on demand in 2016, 2017 and 2018, but other factors may also have contributed to the significant growth in the period.



According to datamintelligence.com the global cruise tourism was expected to grow by an annual growth rate of approximately 10% on average in the period from 2019-2026. That makes the cruise sector the 2nd fastest growing tourism form only surpassed by adventure tourism, which according to alliedmarketresearch.com was expected to grow at an average of 13% in the years from 2019-2026. These are predictions made prior to the covid-19 outbreak.

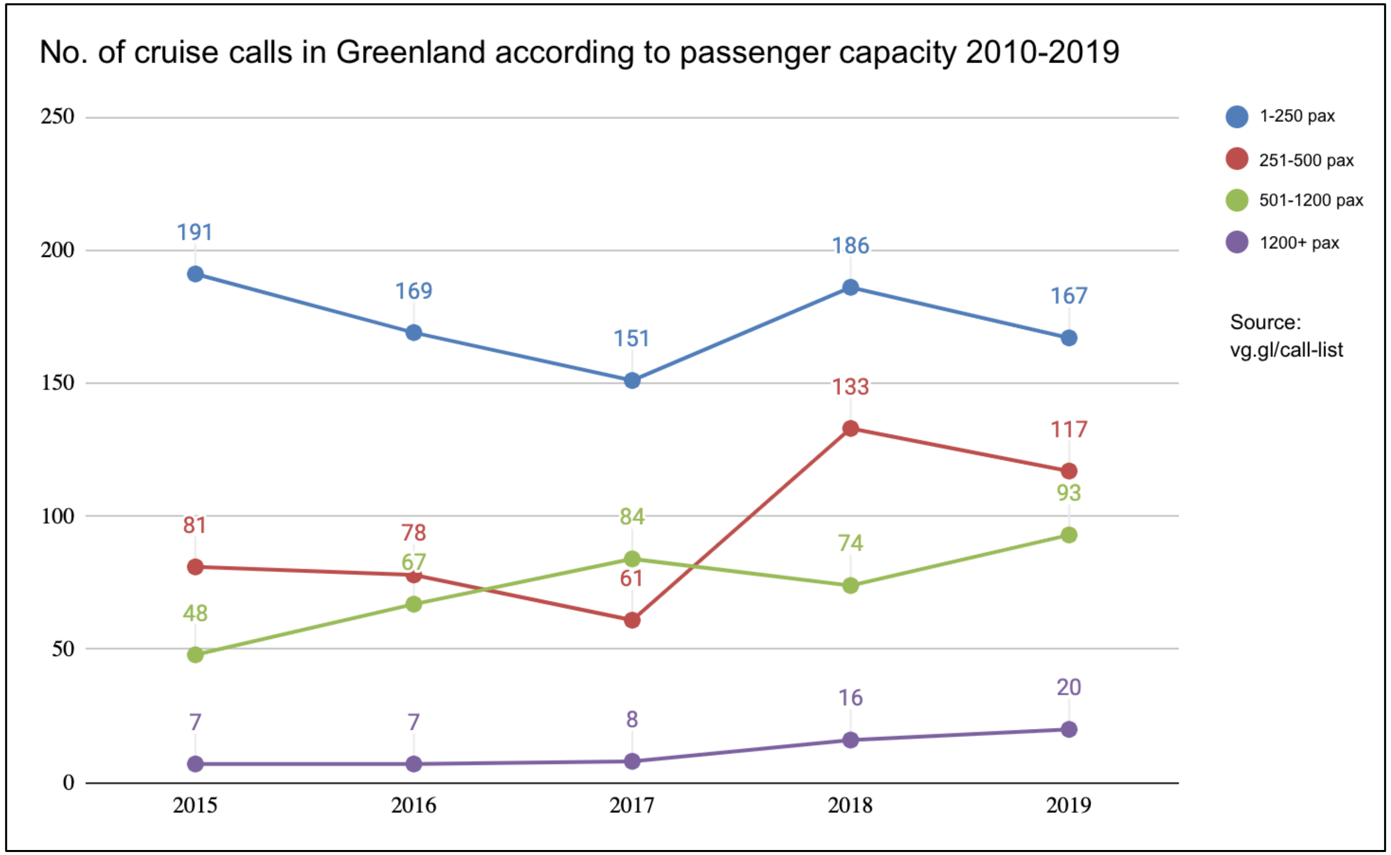
Unfortunately, we must expect a significant decline in 2020 and possibly all the way into 2021 due to covid-19.

At this point it is undecided when it will be possible for cruise lines to once again sail in Greenland and globally.

Cruise Tourism – Number of Port Calls According to Passenger Capacity

Based on the port call list the graph below lists (vg.gl/call-list) how many port calls there have been within each of the 4 so-called 'pax classes' (size categories based on passenger capacity).

For the smallest pax class the level has varied quite a lot over the 5 years, but in 2019 the number is only slightly below the level in 2015. For the 3 largest pax classes there has been a growth trend over the 5 years. The number of calls for the 3 largest pax classes combined has risen to 230 in 2019 from 136 in 2015, which represents a growth of 69%.



The total number of calls in the period 2015-2019 was:

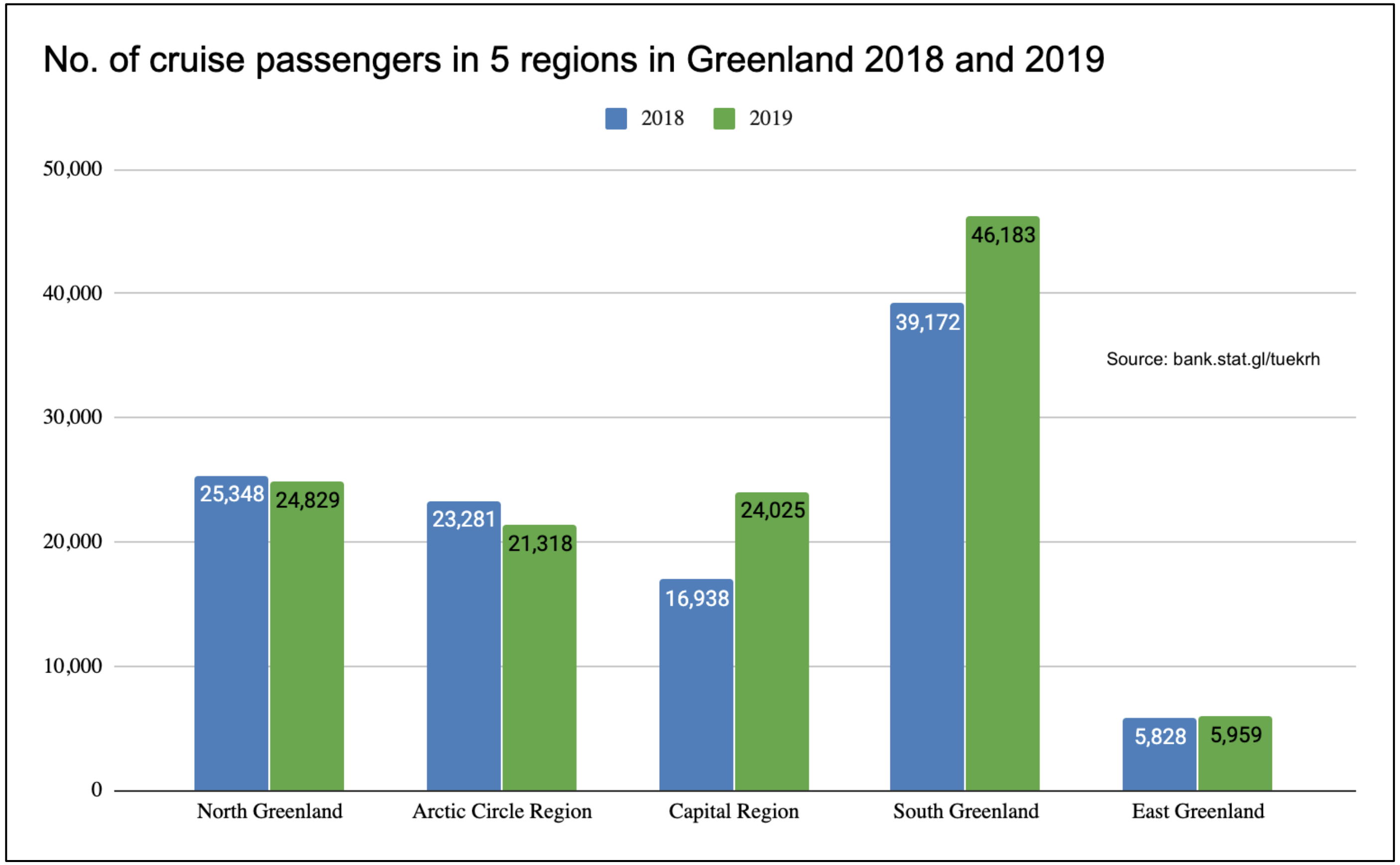
- 2015: 327 calls (7 of them in uninhabited locations)
- 2016: 321 calls (9 of them in uninhabited locations)
- 2017: 304 calls (15 of them in uninhabited locations)
- 2018: 409 calls (19 of them in uninhabited locations)
- 2019: 397 calls (1 of them in uninhabited locations)

If one deducts the port calls in uninhabited locations from the 2018 and 2019 numbers the result is 390 and 398 port calls respectively, so the calls in 2019 have had a larger financial impact than the port calls in 2018, especially as the uninhabited locations do not have a port agent service that can charge port fees.

One could argue that one should completely ignore the port calls in uninhabited locations.

Cruise Tourism – Number of Guests Per Region

On page 12 one can read that the combined total growth in the number of unique cruise passengers was only 2% in Greenland in 2019. When the number of passengers on each port call for all cities are added together, the development can look differently than if one counts the total number of unique passengers visiting the country in any given year. This is the case in 2019 that saw a 10.6% growth when one adds the number of all passengers on each port call (in the cities in Greenland where port calls are registered by Statistics Greenland). This means that each ship in 2019 on average has more port calls than in 2018 – *and/or* that ships with a large passenger capacity on average had more port calls.



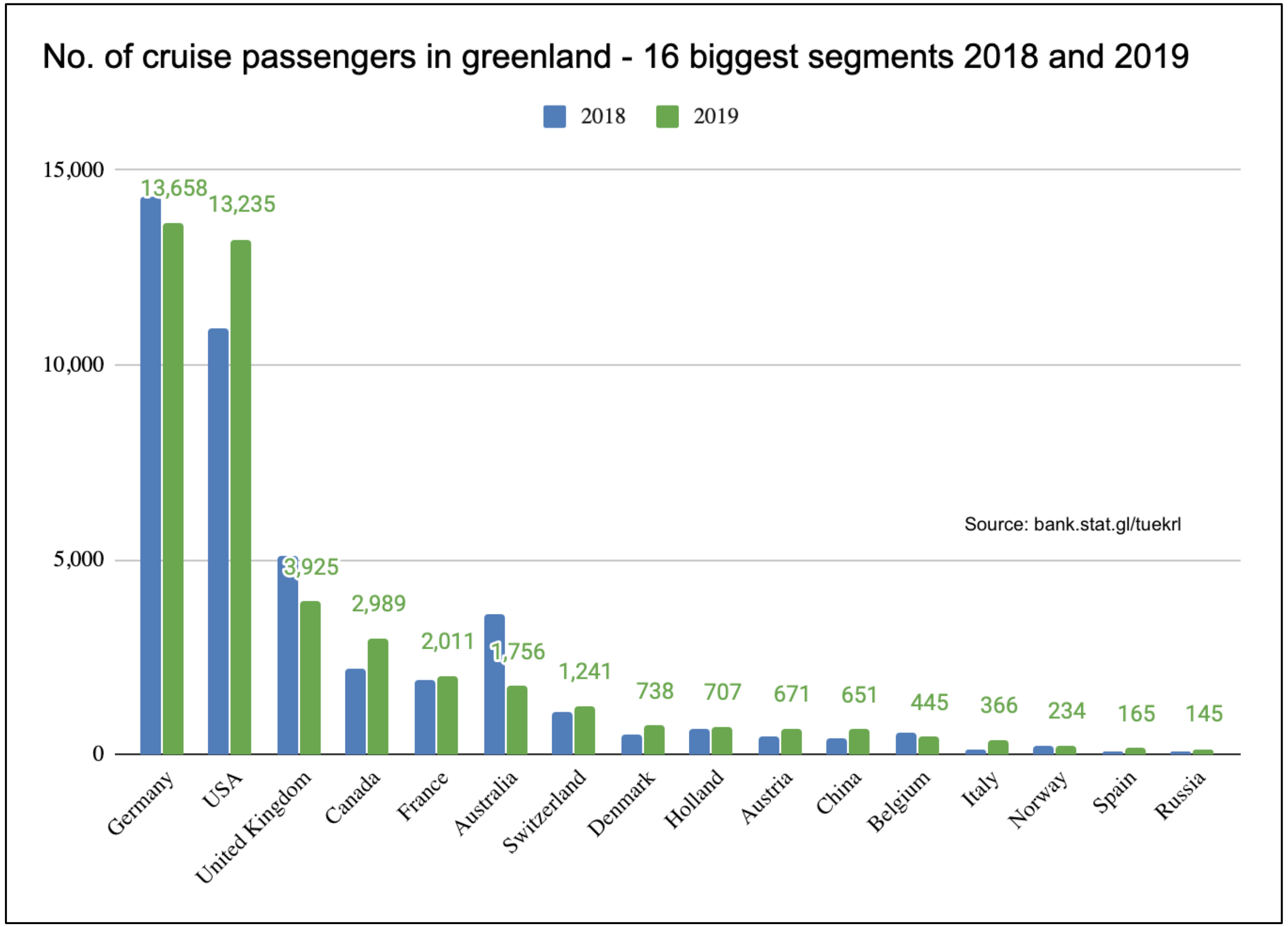
There has been a quite a significant growth in the number of passengers calling on Capital Region (41.8%) and in South Greenland (17.9%), while there has been a decline in North Greenland (-2.1%) and in Arctic Circle Region (-8.4%). East Greenland is at status quo.

The growth – positive as well as negative – represents the economic potential for tourist operators offering experiences ashore such as souvenir sellers, shops, cafes and restaurants.

To what extent this potential has been met, we have no data on, but we have the statements from the tourist operators that participated in our survey on the 2019 season. Read more about this on page 16.

Cruise Tourism – Number of passengers, 16 largest Segments

As the port charges were changed with effect from the 1st of January 2016 the registration of cruise guests by nationality began. In practice 26 countries are registered plus 'Other Europe', 'Other Asia' and 'Other Countries' – the same countries and areas have been registered in relation to guests in the accommodations and flight passengers since the 1st of January 2016. Below is the number of guests from the 16 largest cruise segments in 2018 and 2019.



2018 was 30.8% more Germans than Americans, but in 2019 there was only 3.2% more Germans than Americans thanks to a growth in the number of Americans of 21.0% and at the same time a decline in the number of Germans of -4.6%.

In 2019 the segments Great Britain and Australia represented the largest decline of -22.9% and -51.1% respectively.

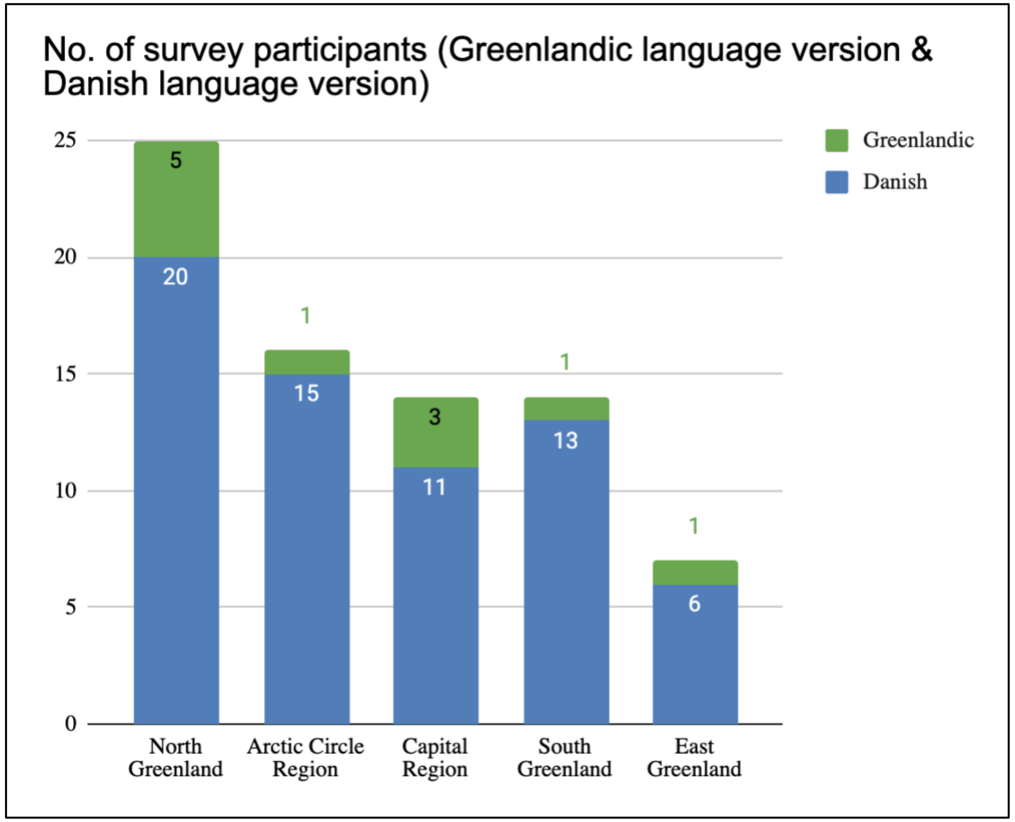
Canada on the other hand represented a growth of 35.3%, while Switzerland represented a growth of 11.5%.

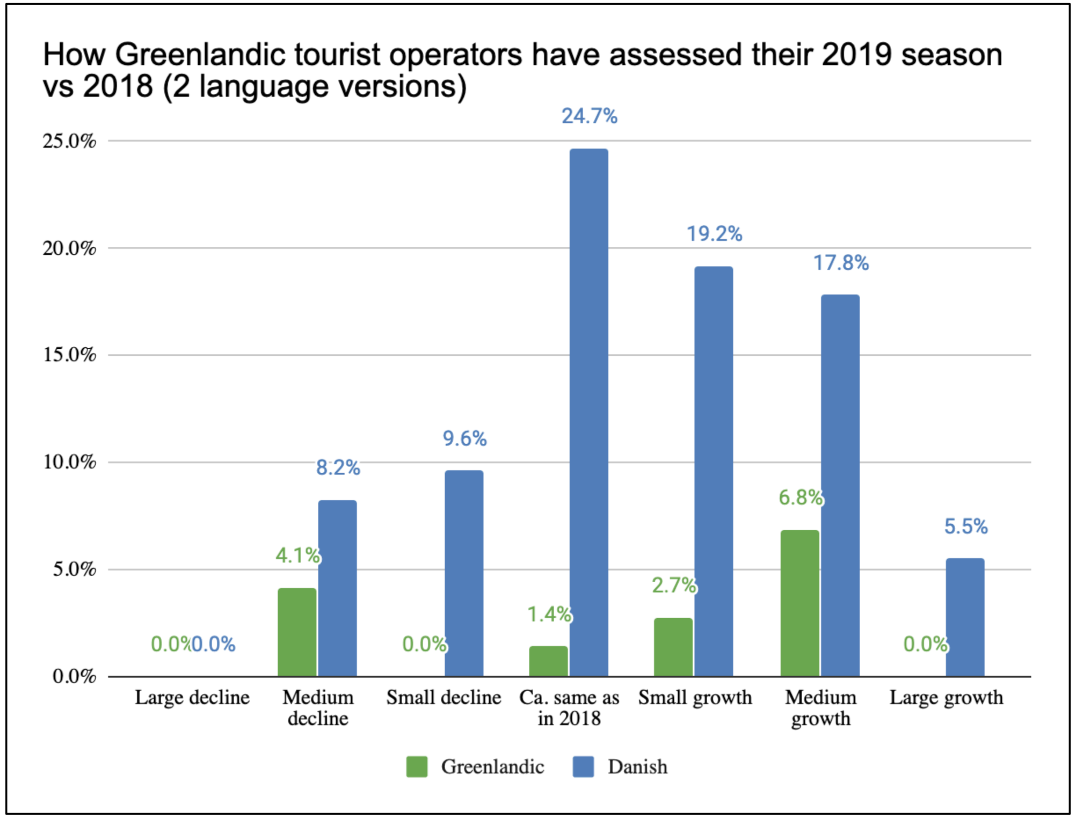
The remaining segments are samples with less than 1,000 individuals, thus, growth rates (positive as well as negative) are not statistically valid.

Survey Among Greenlandic Tourist Operators on the 2019 Season

Since 2018 Visit Greenland has asked approximately 300 Greenlandic tourist operators via an online survey how their tourism season in the past year has been. Naturally, there has been two language versions, Greenlandic and Danish. Bottom left one can see how many respondents have participated from which regions. In total 73 tourism operators participated in our survey on the 2019 season, and luckily, they were somewhat evenly distributed among the 6 regions.

The graph to the right shows how the tourist operators has assessed their own season in 2019. 21.9% saw a decline in 2019. 26.1% saw no change compared to 2018, while 52.0% experienced growth. It sounds rather positive. But one must take the reservation that they represent 73 out of approximately 300 tourist operators. In the regional reports that are also published on tourismstat.gl, we dig a little deeper in the development on a regional level.



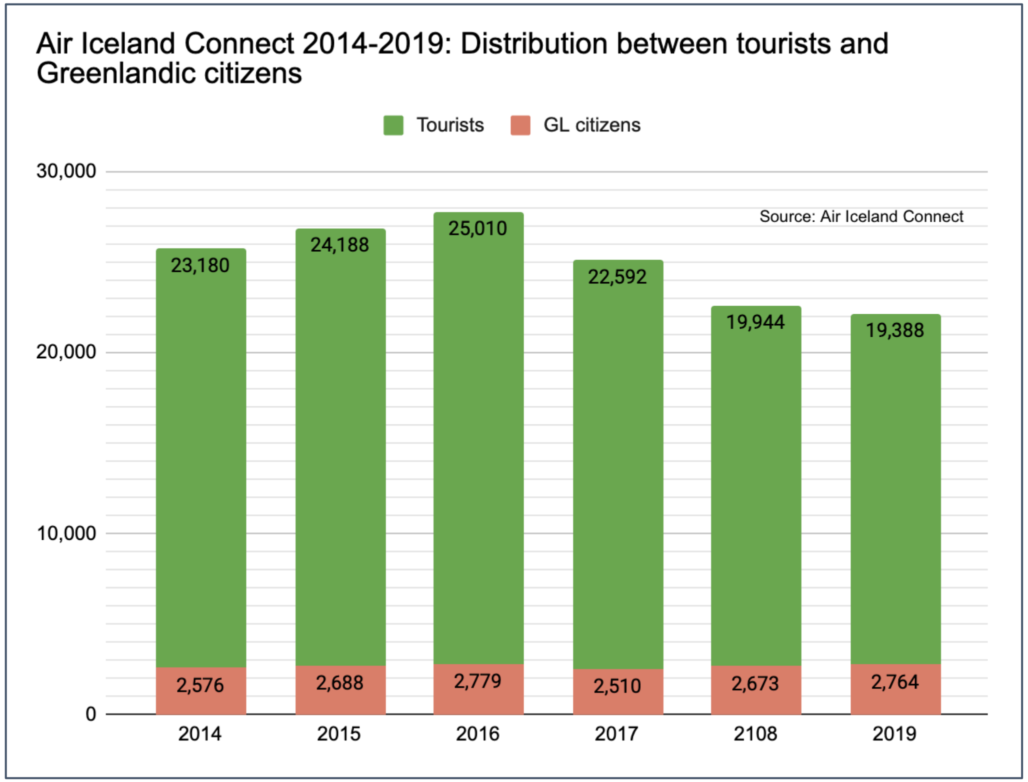


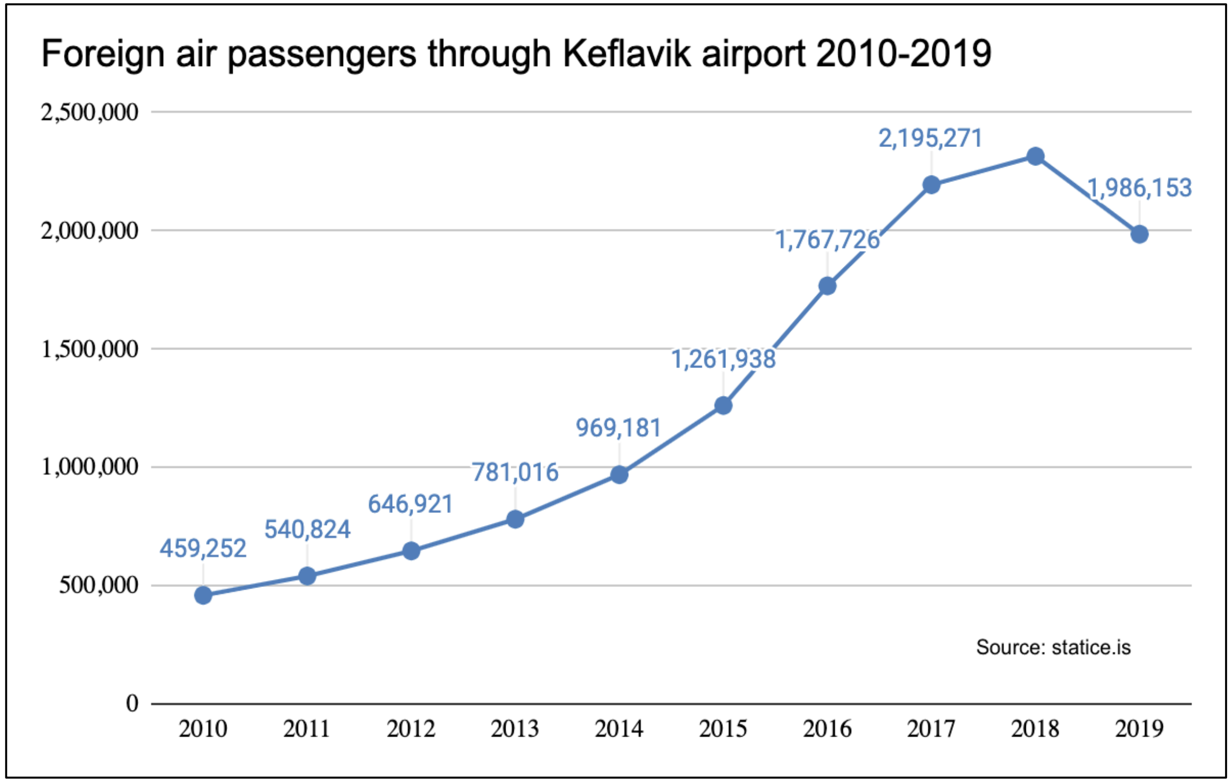
Air Iceland Connect Routes and the Development in Iceland

From 2014-2016 Air Iceland Connect saw a growth in their Greenland routes, but as the graph to the left shows there has been a downward trend since 2017. If one is to point to something positive, the decline from 2018 to 2019 is 'just' -2.8%, whereas the decline from 2016-2017 (-9.7%) and 2017-2018 (-11.7%) was significantly higher.

The number of GL citizens has been stable throughout the period.

It is well-known that Iceland experienced a tourism related recession over the course of 2019. One of the main reasons was the bankruptcy of the discount airline WOW Air in March 2019. The graph on the right shows the number of international flight passengers through Keflavik in 2019, and as one can see there was an exponential growth in the years from 2010 to 2016, after which the development in 2017-2018 stagnated slightly, only to suddenly drop significantly in 2019.





Distribution of Tourists – Foreign Flight Passengers and Cruise Passengers

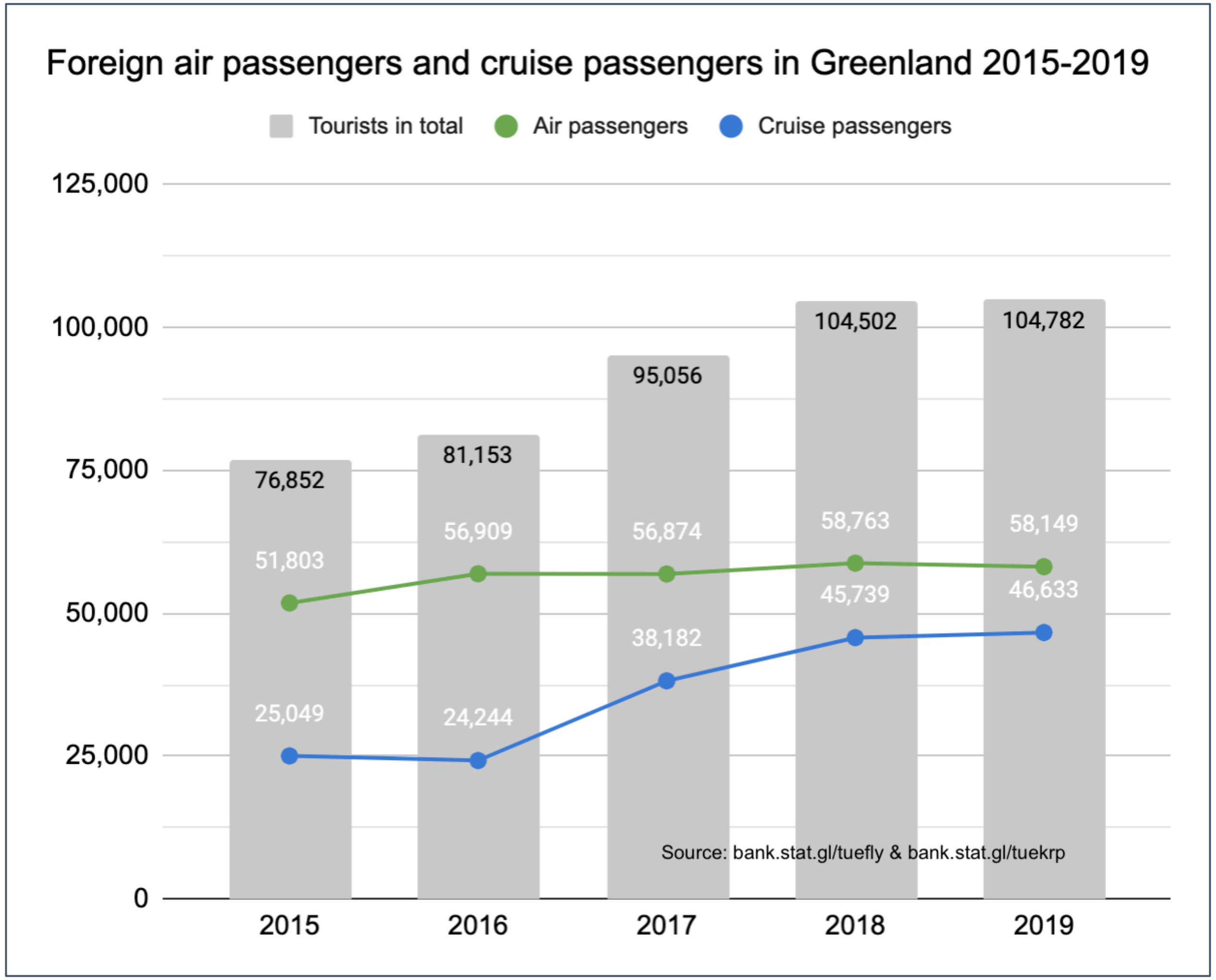
Flight Passengers (land-based)
The registration of flight passengers by country of residence began in July 2014. That makes 2015 the first full year from which we have data on the country of residence of the flight passengers. The years 2016 to 2017 as well as 2018 to 2019 represented two years that saw a slightly declining trend. Overall, in course of the 4-year period 2015-2019, there has been a growth in the number of flight passengers (incl. DK) of 12.3%.

Cruise Passengers
The number of cruise passengers has increased every year since 2016, with 2017 and 2018 as the years with the most significant growth of 57.5% and 19.8% respectively. One must take the reservation that Statistics Greenland is in the process of revising the numbers for 2015 and 2016.

Land-based and Cruise Combined
Overall, the number of tourists visiting Greenland has been on the rise since 2015. But 2019 represents a stagnation with a total increase of just 0.3%, in other words status quo.

The numbers must be taken with the following reservations:
In 2019 7.2% of the flight passengers were not registered by country of residence. The non-registered category (Unknown) has by agreement with Statistics Greenland been distributed proportionally among the country segments in order to better be able to compare one year with the next.

There seems to be a certain overlap between land-based flight passengers and cruise passengers, as between 3,000 and 5,000 of the latter either arrive or travel out of Greenland by airplane. Most of these, however, do behave similarly to the land-based tourists in the time frame when changing between ship and airplane (buying tours, souvenirs etc.).



The New Tourism Strategy 2020-2023

In February 2020 Visit Greenland published its 2020-2023 strategy, which is a part of the tourism strategy of the Government of Greenland. Read it at vg.gl/strategi.

The Overall Vision:
"We help create economic growth, jobs and a sustainable development of our community by making Greenland an internationally known and sought-after adventure destination with a focus on quality, safety and sustainability."

'Must-wins' – The Strategy is Based on the Following Core Tasks:

#1 Increase demand from adventure tourists

#2 All year-round tourism in all of Greenland

#3 Knowledge sharing and competence upgrade

#4 Promote favourable framework conditions

Sustainability – The Starting Point is 4 of the UN Sustainable Development Goals:

Goal 4: Quality Education

Goal 8: Decent work and economic growth

Goal 12: Responsible consumption and production

Goal 17: Partnerships for the goals

11 recommendations - The Greenlandic Tourism Industry has developed the following 11 recommendations:

1. A strong and cohesive strategy for the tourism development
2. Season expansion – distributing tourism over time and place
3. Increased innovation and entrepreneurship
4. Sustainability; nature and culture
5. Certification of tourism operators – quality and safety
6. Securing labour for the tourism industry
7. Competence development and training
8. Infrastructure – aside from airports/heliports; port infrastructure, roads, trails, attractions, signs, restrooms, souvenirs etc.
9. Establishing/strengthening the regional DMO's and marketing
10. Organizations
11. Branding and marketing

The strategy covers the approximately 3-year period leading up to the opening of the 3 Transatlantic airports in Ilulissat, Nuuk and Qaqortoq, which is expected to be operational in the autumn of 2023. The tourism in Greenland is in the middle of a major transformation, as the new airports provide good conditions for a significant increase in the number of tourists, thus making it necessary to increase investments in capacity in relation to accommodation, tour services, dining, transport, quays and the like.

Tourism Sentiment Index - TSI

Destination Think is a tourism research company based in Canada offering analysis of 'online conversations', i.e. user generated review, posts, comments, questions and the like, which takes place on online media sites, forums, social media and review sites such as Facebook, Twitter, Instagram, TripAdvisor and the like.

Visit Greenland has bought 3 analysis which each covers millions of 'conversations' for each of the years 2017, 2018 and 2019. At present VG has received the analysis on 2017 and 2018 and expect to receive the analysis on 2019 in Q2-20.

Destination Think analyses the many millions word based (English) online conversations between ordinary people using artificial intelligence and divides them in to 3 categories: Positive (assigned the value 1), Neutral (assigned the value 0) and Negative (assigned the value -1).

Visit Greenland has supplied the so-called 'keywords', which are the words that the system must monitor. The conversations must meet the criteria that they are about Greenland in a tourism context. I.e. that the conversation is about travel experiences in Greenland – both when it comes to users that have visited Greenland as well as users that only have information and impressions from the media.

The other keywords than 'Greenland' and 'travel' are related to specific tourism experiences and products in some shape or form. The results are divided into specific sub-categories (e.g. Snowmobiling, Hiking, Fishing and the like) and in the general 'Tourism Assets' categories: *Amenities & Entertainment*, *Food & Culinary*, *Outdoor Activities*, *Relaxation & Wellness*, *Culture & History* and *Destination Services*.

The score in the different areas is attributed by the artificial intelligence and is then compared with the results from Northern Norway, Nunavut (CA), Patagonia, Iceland and Newfoundland & Labrador, as they are competing destinations. One can read the analyses at vg.gl/tsi2017 and vg.gl/tsi2018.

Overall, the two analysis show that Greenland from 2017 to 2018 has gained more positive attention, i.e. that the total share of positive statements has increased. In 2017 Greenland obtained a total score and 42 and in 2018 a total score of 46.

In 2017 Greenland was below the average for the other comparable destinations (called the median) in practically all the Tourism Assets areas.

In 2018 Greenland has scored the following in relation to Tourism Assets:
Destination Services: The score is 52 vs a median of 41
Relaxation & Wellness: The score is 43 vs a median of 43
Culture & History: The score is 37 vs a median of 33
Food & Culinary: The score is 37 vs a median of 40
Amenities & Entertainment: The score is 35 vs a median of 33
Outdoor Activities: The score is 48 vs a median of 45

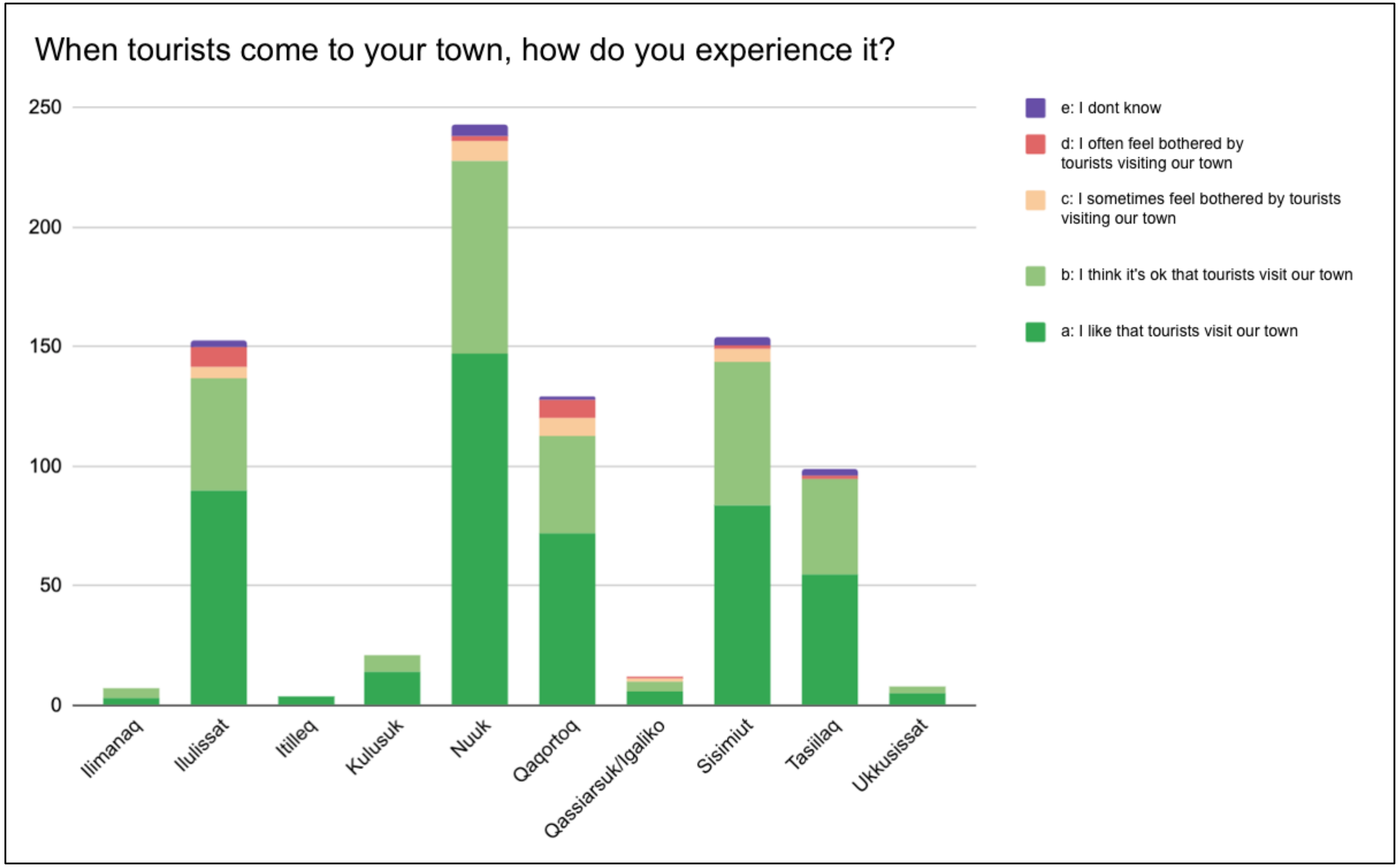
The impression of tourism experiences in Greenland has thus moved in a more positive direction from 2017 to 2018. As can be seen above in 4 out of 6 Tourism Assets Greenland places higher than the median for the competing destinations (2018).

Visit Greenland will receive the TSI analysis on online conversations in 2019 primo Q2-2020, and it will then be published on tourismstat.gl.

The Populations Attitude to the Tourism

In November 2019 Visit Greenland carried out a survey, in collaboration with HS Analyse, a phone-based questionnaire among the Greenlandic population in the following cities and settlements: Nuuk, Ilulissat, Sisimiut, Tasiilaq and Qaqortoq, as well as the settlements Ilimanaq, Ukkusissat, Itilleq, Qassiarsuk/Igaliko and Kulusuk. The chosen cities and settlements represent places that see quite a bit of tourism activity. The population's overall experience of tourists in their city/settlement is predominantly positive.

On the question of how tourists are generally perceived in the townscape, 92.4% are positive, while 4.5% have a negative impression. Only 1.8% are undecided.



At vg.gl/bef-holdn-tur19 one can read a summary of the results of the survey (in Danish).

The survey inquired about different aspects of tourism, among other things to what extent people think that tourists contribute positively to the local community as well as how cruise tourism is perceived.

Overall, the population has a positive view of both land-based tourists and cruise tourists. The attitude towards land-based tourists is, however, slightly more positive.

If one disregards the respondents that do not have a position or do not know what to answer, between 86% and 96% of the population surveyed regard tourism in a positive manner, when one looks across all the questions about the population's impression of the tourists and their behaviour.

Final Thoughts

2019 was a year with both positive and negative trends/indicators in the Greenlandic tourism. In relation to the number of international passengers travelling out of Greenland we unfortunately saw a small decline of -1.3%. In relation to overnight stays there is a significant growth in the DK segment, both when it comes to number of overnights stays and the number of guests. Excluding the DK segment there is, however, a decline of -7.0% in the number of international overnight stays as well as a decline of -2.2% in the number of international guests.

A 2.0% increase in the number of unique cruise passengers is satisfactory. At the same time there is a significant increase in the number of passengers on port calls in the regions South Greenland and Capital Region compared to 2018, which indicates the potential for income for the cruise relevant tourist operators in those regions.

In addition, the result from the Visit Greenland's tourist operator survey shows predominantly positive statements about the 2019 tourist season, as only 21.9% of the respondents reported a decline. 26.1% experienced no change, and 52.0% experienced growth.

Data on More Segments

Thanks to a special data extraction from Statistics Greenland this report was able to look into the extra segments – for the very first time – which have been registered since the 1st of January 2016, but are not yet published at bank.stat.gl. One of the major findings is that if one adds all the Asian segments together there was a growth of 50.3% in the number of guests from 2018 to 2019. In addition, the segment Switzerland appears to have quite a lot of potential.

Covid-19 Pandemic

At the time of writing (April 2020) a global pandemic of covid-19 virus has unfortunately erupted, which has already had a major negative impact on tourism in practically every country across the globe. Many countries have closed all unnecessary activities, closing schools, public jobs and borders. Greenland has closed all international flight departures and it has since been discussed if entry should be barred for flight passengers wishing to travel to Greenland.

This report will obviously date quickly in relation to the covid-19 situation, but it is already obvious that the pandemic will have major negative consequences for the tourism industry and the economy as a whole.

Visit Greenland continuously updates an article on the covid-19 pandemic and its consequences at visitgreenland.com and traveltrade.visitgreenland.com. Furthermore we have published a list of cancelled or postponed cruise port calls, vg.gl/cancelled_calls2020, which is also updated regularly.

Visit Greenland has, in collaboration with the regional tourism organizations and other partners, launched a campaign to entice Greenlandic citizens to go on vacation in their own country, while the covid-19 pandemic prevents international tourists from visiting Greenland. We hope that this initiative will help keep business going for the local tourist operators that are currently struggling.

Stay safe out there and good luck to us all!

Best regards
Visit Greenland

The tourism statistics report is compiled by Mads Lumholt, Visit Greenland, April 2020.