



DIVE TOURISM

Dive tourism is travel where at least one scuba diving expedition is included.

With 5,200 km of mainland coastline, an abundance of islands, marine wildlife, 1,600 wrecks, great weather, great visibility and the largest living coral reef in the world, Queensland is a mainstay for the niche market of dive tourism.

In September 2003 Tourism Queensland conducted a review of current research to gain a better understanding of the dive tourism market. Specific objectives of conducting the review were to:

- Develop a market profile of the dive tourism sector in Queensland;
- Provide information on what people are looking for in a dive tourism experience; and
- Identify core issues that confront both the operation and development of dive tourism businesses.

1.1 Market Insight

- There are two main diving instructor agencies in Australia: PADI (Professional Association of Diving Instructors) and SSI (Scuba Schools International). Both agencies are fully internationally recognised.
- There are an estimated 5 to 7 million active divers worldwide.ⁱ Other research suggests there are:
 - Over 34,600 scuba divers in Australia.ⁱⁱ
 - Approximately 2.5 million divers in the USA.ⁱⁱⁱ
 - Approximately 100,000 divers in the UK.^{iv}
- The Australian recreational diving market has been estimated to be worth \$1 billion from international visitors and \$547 million from Australian divers.^v
- Around 5% of international visitors dive during their stay in Australia, and about 0.5% of Australian domestic travellers dive while on holiday.^{vi}
- Queensland is a stopover for 93% of international divers visiting Australia and around 40% of domestic diving holidays in Australia.^{vi}
- The Great Barrier Reef Marine Park, Queensland's most popular diving destination, attracted over 1.8 million visitors in 2002^{vii} and generates approximately \$1 billion from reef-based tourism each year.^{viii}
- Approximately 740,000 dives are taken in the Great Barrier Reef Marine Park each year.^{ix}
- There are currently 684 tourism operators that are scuba diving permit holders in the Great Barrier Reef Marine Park.^x
- 85% of marine tourism in the Great Barrier Reef Marine Park is focussed in the Cairns and Whitsundays regions.^{xi}

1.2 Type of Experience Sought

- Little research exists on diver travel preferences.
- Rodale's Scuba Diving Magazine found the most important considerations for divers choosing a dive destination were the quality of diving and the cost. A similar survey conducted by Rodale's found that the most important factor for choosing a dive operator was the operator's reputation.^{xii}
- The most common reasons given by visitors to the Great Barrier Reef Marine Park (including non-divers) for their visit are to experience the beauty of nature, to experience something new and different and to be in a natural place. One quarter of visitors hope to develop skills like diving or snorkelling.^{xiii}
- International visitors to Australia who dive during their visit reveal that the main influence on their decision to come to Australia was to experience Australia's coastline and beaches and to experience Australia's nature, landscape and wildlife.^{vi}
- Half of the international dive visitors to Australia stay in another country during their overseas trip (most commonly in New Zealand).^{vi}

1.3 Activities

The following dive experiences are available in Queensland dive locations:

- Day boats
- Specialist day boats
- Live-aboard
- Specialist live-aboard
- Dive training

The most common holiday activities for domestic dive visitors are going to the beach (75%), eating out or going to restaurants (68%), general sightseeing (49%), bushwalking or rainforest walks (36%), going to pubs, clubs or discos (35%) and going shopping (33%).^{vi}

1.4 Destination Preferences

An attractive dive destination is one that provides:

- Healthy marine environment
- Information trails or information provided on the trip
- Variety of different diving sites (e.g., wreck sites, wall sites, coral reefs, etc)
- Good visibility
- Abundance of wildlife

Rodale's Scuba Diving Magazine (USA) recently listed the top ten dive sites in the world as:^{xiv}

1. Galapagos Islands
2. Morehead City, N.C.
3. Little Cayman
4. Palau, Micronesia
5. Cozumel, Mexico
6. Bonaire
7. Tobermory, Canada
8. Great Barrier Reef, Australia
9. British Columbia, Canada
10. Egyptian Red Sea

1.5 Accommodation Preferences^{vi}

- International dive visitors to Australia most commonly stay in:
 - Hotels, resorts, motels or motor inns 63%
 - Backpacker hostels 45%
 - Home of a friend or relative 33%
- Domestic dive visitors in Australia most commonly stay in:
 - Hotels, resorts, motels or motor inns 26%
 - Home of family or friends 22%

1.6 Travel Party^{vi}

- International dive visitors to Australia most commonly travel as:
 - Unaccompanied travellers 49%
 - Adult couples 31%
- Domestic dive visitors in Australia most commonly travel as:
 - Adult couples 33%
 - Friends or relatives (without children) 25%
 - Family groups (parents and children) 23%

1.7 Information Sources

The most common information sources used by domestic dive visitors for planning a trip are: ^{vi}

- Internet 26%
- Travel agents 11%

Great Barrier Reef Marine Park visitors (including non-divers) use the following information sources when planning their trip: ^{xiii}

- Friends/family 39%
- Articles in newspapers/magazines 28%
- Brochures/pamphlets picked up in the region 28%
- Books/library 27%
- Travel agent 20%
- Other travellers 20%
- Tour operator/company 19%

1.8 Demographic Profile

- 60% of certified divers are aged between 15 and 34 years. ⁱ
- Around two-thirds of certified divers are male. ⁱ
- Most divers are well educated and travel overseas often. ^{xv}
- Around 80% of divers have a valid passport. ⁱⁱⁱ
- 64% of divers in Texas have four or more years of college education, with a median income range of US\$60,000 to \$69,999 per annum (approximately AUD\$90,000 to \$110,000). ^{xvi}

International Dive Visitors to Australia ^{vi}

- 54% of international dive holiday visitors are aged between 20 and 29 years.
- 50% are male; 50% are female.
- 25% are from the United Kingdom, 20% are from Japan, 18% are from other European countries and 16% are from the United States of America.
- 69% are first time visitors to Australia.
- 42% identify as adventure travellers, 32% identify as budget travellers, and 29% identify as backpackers.

Domestic Dive Visitors in Australia

- 54% of Australians who scuba dive on holidays are aged between 25 and 44 years. ^{vi}
- 67% are male; 33% are female. ^{vi}
- 57% have an annual household income greater than \$52,000. ^{vi}
- 57% of domestic holiday scuba divers reside in New South Wales or Queensland ^{vi}, although participation rates are higher among visitors from Western Australia, the Northern Territory and the Australian Capital Territory. ⁱⁱ
- Of those divers visiting Queensland – 41% are from New South Wales, 38% are from Queensland, and 13% are from Victoria. ^{vi}

1.9 Barriers

- One potential barrier to dive tourism in Queensland is the threat of coral bleaching, coral mortality and a reduction in the biodiversity within the marine park due to rising temperatures from global climate change. ^{xvii} Given that the Great Barrier Reef Marine Park is seen as one of the most diverse and healthy coral reefs in the world, the threat of coral bleaching may have profound effects on tourism to the region.
- Outbreaks of the Crown-of-Thorns starfish in some areas of the Great Barrier Reef Marine Park will also have the potential to impact on coral mortality, which will in turn impact the marketability of the area to dive tourism markets. More research is required to better understand this phenomenon and its impact on the reef. ^{xviii}

- Diving limitations need to be in place to protect the marine environment. A recent study found that coral reefs become endangered after approximately 5,000 or more dives are completed in a one-year period.^{vii}
- Although tourism has been shown to be somewhat helpful for the marine environment, around half of Australians still believe that tourism in the Great Barrier Reef Marine Park has an adverse effect on the environment.^{xix}
- Marine tourism in general can impact the marine environment. The main impacts from marine tourism include: coastal tourism development (population pressures, construction activities), island based tourism infrastructure (marinas, sewerage discharge, construction), marine tourism based infrastructure (pontoons, moorings, fish feeding), boat-induced damage (anchoring, ship grounding, litter, waste discharge), water based activities (diving snorkelling, reef walking, fishing) and wildlife interactions (seabirds, turtle watching, whale watching).^{vii}
- The tourism industry, along with other industries, is reporting concerns over major increases in premiums for public liability insurance. In many instances, companies are seeing their premiums jump significantly despite the fact that no recent claims have been made. National Tourism Alliance (NTA) members report increases ranging from 200% to 1000%, mainly across adventure tourism, events, horse riding, farm stay, attractions, backpacker hostels and caravan parks. The impacts of these increases could force some tourism operators out of business or force them to increase the price of their product or service^{xx}. This could have a substantial impact on the dive industry, as already one of the main reasons Australians give for not visiting the Great Barrier Reef are that they feel it is too expensive.^{xxi}
- Other reasons Australians give for not visiting the Great Barrier Reef is that they feel they are too old or they just do not find it appealing.^{xxi}
- Tourism operators in the Great Barrier Reef Marine Park are required to pay an Environmental Management Charge to the Great Barrier Reef Marine Park Authority of \$4.50 per visitor per day^{xxii} and are also required to apply for tourism permits. These permits require the operator to abide by certain conditions when managing a tourism business in the marine park, including where the business can travel within the park and activities that can be undertaken.^{xxiii}
- Currently the Great Barrier Reef Marine Park Authority are allowing no new permits for regular tourist operations (marine vessels or aircraft operating for more than 50 days per year) in the Cairns and Whitsundays regions. Current permits are transferable however, so it is possible to obtain a permit in these regions despite the restrictions. There are currently no restrictions on the number of tourism operator permits in other areas of the Great Barrier Reef.^{xxiv}

1.10 Opportunities

- 17% of the world's coral is contained in Australia (second only to Indonesia).^{xxv}
- The Great Barrier Reef is also the world's largest living coral reef, and is among one of the healthiest reefs in the world.
- With its already well-established tourism market, Queensland has much of the infrastructure required for dive tourism, and is therefore well positioned to take advantage of this niche market. Specifically, Queensland possesses:
 - An extremely attractive physical setting
 - Warm tropical and sub-tropical ocean temperatures
 - Good diving all year round (good visibility, migration, coral spawning, etc)
 - World Heritage listed marine park (Great Barrier Reef Marine Park)
 - The Queensland Dive Tourism Association
 - An established group of dive tour operators
 - More than 70 dive shops for equipment maintenance
 - Wide variety of tourist accommodation near established diving destinations
- Recent alliance formed between the Professional Association of Diving Instructors (PADI) Asia Pacific and the Pacific Asia Travel Association (PATA) should be a big boost for the Asia Pacific dive tourism market, with the partnership designed to enhance the growth, value and quality of the dive travel experience for members of these organisations.^{xxvi}
- Queensland currently has no cave diving sites operating, which is becoming more popular in other countries and other areas of Australia. Australia currently has around 19 cave diving sites, mostly in South Australia.^{xxvii}
- Queensland has more wreck dives situated along the coastline than any other Australian state (1,600).^{xxviii}
- Tourism in the Mackay/Capricorn section of the Great Barrier Reef Marine Park has more than doubled in the 18 months to December 2002. Visitor days have increased from 134,566 in the

period January 2000 to June 2001, to 282,270 in the period July 2001 to December 2002. The Mackay/Capricorn section of the reef is the nearest access point for Brisbane and the Gold and Sunshine Coasts. There are currently no limitations on tourism permits in this section of the marine park.^{xxix}

- The recent release of the film “Finding Nemo” and a deal allowing Tourism Queensland to use the film to promote the state will assist in an increase in the number of visitors to the Great Barrier Reef, from both international and domestic markets.^{xxx}

1.11 Marketing

- Diving marketing should be focussed to the diving market (eg. diver magazines, dive shops, websites, etc). Due to the large number of diving sites globally, operators and organisations need to focus on what makes Queensland diving and Great Barrier Reef diving so unique compared to other diving sites in the world.
- Research shows that domestic diving visitors also enjoy going to the beach, eating out at restaurants, sightseeing (walking/driving) and bushwalking. It may benefit operators to consider these activities when preparing a package for the diving market.
- Given that most international divers are visiting another country during their visit, operators may benefit from developing packages with other overseas destinations, particularly those in the South East Pacific region (eg. Thailand, Philippines, New Zealand, etc).
- The Great Barrier Reef is considered a classic destination as far as world diving locations are concerned, however it is also often considered too far for scuba divers to travel to. The Great Barrier Reef may need to reinvent itself as a destination – perhaps with new diving trails or holiday packages.

ⁱ <http://www.padi.com/english/common/padi/statistics/>

ⁱⁱ Active Australia – The Numbers Game (2000). A description of organised sport and physical activity participants in Australia. Australian Sports Commission, Canberra.

ⁱⁱⁱ <http://www.seagrant.wisc.edu/communications/diving/panicQA.html>

^{iv} http://www.bbc.co.uk/holiday/traveltools/5_diving.shtml

^v <http://www.deeperblue.net/newsfull.php/674>

^{vi} National Visitor Survey and International Visitor Survey, Bureau of Tourism Research, 2002.

^{vii} http://www.gbrmpa.gov.au/corp_site/key_issues/tourism/gbr_visitation/page_05a.html

^{viii} <http://www.reef.crc.org.au/aboutreef/index.html>

^{ix} Association of Marine Park Tourism Operators (AMPTO) Ltd., <http://www.ampto.com.au>

^x http://www.gbrmpa.gov.au/pems_public/dsp_search.cfm?report=currPermit

^{xi} Harriott, VJ. 2002. Marine tourism impacts and their management on the Great Barrier Reef. CRC Reef Research Centre Technical Report No 46. CRC Reef Research Centre, Townsville.

^{xii} <http://www2.scubadiving.com/feature/scubapoll/travel.shtml>

^{xiii} Saltzer R. 2002. Understanding Great Barrier Reef Visitors: Preliminary Results. CRC Reef Research Project B2.1.1 Data Summary Report 1. (B2.1.1)

^{xiv} <http://www2.scubadiving.com/feature/specials/top10000/destinations.shtml>

^{xv} <http://www.fba.nus.edu.sg/rsearch/pqrc/PQRCNW/5ICIT/Powerpoint/11-04.ppt>

^{xvi} Ditton, R.B. & Baker, T.L. (1999) Demographics, attitudes, management preferences, and economic impacts of sport divers using artificial reefs in offshore Texas waters. Department of Wildlife and Fisheries Sciences, Texas A&M University, College Station, TX.

^{xvii} Done, T., Whetton, P., Jones, R., Berkelmans, R., Lough, J., Skirving, W., & Wooldridge, S. (2003). Global climate change and coral bleaching on the Great Barrier Reef. Report to State of Queensland Greenhouse Taskforce through the Department of Natural Resources and Mines.

^{xviii} CRC Reef Research Centre Current State of Knowledge Brochure (2001). Crown-of-thorns starfish on the Great Barrier Reef. CRC Reef Research Centre, Townsville.

^{xix} Moscardo G. Oct 1997. Visitor survey helps tour operators understand travel trends. Exploring Reef Science. CRC Reef Research Centre Ltd, Townsville.

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- ^{xx} http://www.mcmb.net.au/pubpics/nta_insurance.pdf - May, 2002
- ^{xxi} Green, D., Moscardo, G., Greenwood, T., Pearce, P., Arthur, M., Clark, A., & Woods, B. (1999) Understanding Public Perceptions of the Great Barrier Reef and its Management CRC Reef Research Centre Ltd Technical Report No. 29 Townsville; CRC Reef Research Centre Ltd, 64 pp
- ^{xxii} http://www.gbrmpa.gov.au/corp_site/key_issues/tourism/day_tours.html
- ^{xxiii} http://www.gbrmpa.gov.au/corp_site/key_issues/tourism/permits_policy.html
- ^{xxiv} http://www.gbrmpa.gov.au/corp_site/key_issues/tourism/documents/latency_audit_2000.pdf
- ^{xxv} Wilkinson, C. (ed) (2002). Status of coral reefs of the world: 2002. Australian Institute of Marine Science.
- ^{xxvi} <http://www.padi.com/english/americas/news/043003-pata/>
- ^{xxvii} http://www.diveoz.com.au/state_stats/state_stats.asp?sc=6#
- ^{xxviii} http://www.queensland-holidays.com.au/rainforest_reef/diving_and_snorkelling.cfm
- ^{xxix} http://www.gbrmpa.gov.au/corp_site/key_issues/tourism/gbr_visitation/mac_cap_section.html
- ^{xxx} <http://www.smh.com.au/handheld/articles/2003/08/11/1060588323028.htm>

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