

Dive tourism from Europe

Europe is a key source market for dive tourism. Western European countries such as Germany, France and the United Kingdom are especially strong markets. European divers are interested in sustainable destinations, with good health and safety measures. They increasingly look for unique diving sites or experiences. As senior travellers discover diving, this growing population is becoming a promising target group. Reliability is a must, which you can show through certification.

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1. Product description

The main purpose of dive tourism is to take part in scuba diving activities. Dive tourism includes an increasingly wide range of recreational dive activities. It is considered a niche market of adventure or sports tourism.

Tip:

For more general information, see our study of [Adventure tourism](#).

Quality of the dive environment

An attractive dive destination needs a healthy marine environment, with good visibility and plenty of wildlife. There should be a variety of different diving sites such as wreck sites, wall sites or coral reefs. Dive travellers require information trails or information packs for specific trips.

Tip:

Clearly communicate the specifications of your dive destination on your website. Give information on currents, drop-offs, rocks, sand or coral, dive conditions and the depths of dive spots.

Health and safety measures

The health and safety standards of dive tourism providers are of key importance to European dive travellers. European dive tour operators evaluate potential partners based on their level of service, quality and safety. They usually conduct a physical inspection of dive equipment and facilities at the destination before closing a business deal.

Tip:

To meet European expectations, maintain high standards in the use of equipment. In addition, regularly train your staff on safety, maintenance and interaction with customers.

Political stability

Safety is important to European travellers, especially because some developing countries are politically unstable. Most commercial tour operators do not offer holidays to countries which their Ministry of Foreign Affairs has declared unsafe. This policy has led to a drop in tourism arrivals to Mali, Egypt and Venezuela, for example.

Tips:

Keep potential customers updated on changes to the safety situation in your area; for example, through your website and through your staff.

Share safety experiences from customers on your website. Let them write about how safe they felt, because people value the experience of other travellers.

If your region is “unsafe”, commercial tour operators will most probably not go there. In this case, focus on volunteer organisations and individual travellers. Check your country’s current safety status at the website of your target country’s Ministry of Foreign Affairs such as [the Netherlands](#), [Sweden](#) and the [United Kingdom](#).

Sustainability

Sustainability is key to many European dive travellers, especially from western and northern Europe. A dive site that is not managed sustainably will deteriorate and eventually become unattractive for diving.

European divers are often willing to pay a fee for a visit to a marine park or national park. It should be clear that the fee is well spent on the quality of the dive site. Divers are used to paying this fee on the spot. According to tour operators, it gives them a good feeling about the dive location.

Tips:

Do not be afraid to ask a fee for the sustainable maintenance of your local dive sites.

Offer sustainable activities such as a beach or reef clean-up in which your customers can participate. See the [Green Fins Coastal Clean-up Guidelines](#) and [Underwater Clean-up Guidelines](#) for more information. You can also offer guests a [coral reef conservation course](#).

Show your guests that you are committed to sustainability. Always give divers an [Environmental Briefing](#) on how to behave underwater. Accommodation providers can think of a towel reuse programme, waste separation, water saving equipment, LED lights or solar panels. For more ideas, take a look at [How to Create a Green Hotel](#).

If your business is sustainable, promote this aspect on your website and in the information that you provide to European tour operators.

Consider joining a sustainable diving organisation such as [Green Fins](#). If this strategy is not an option, study their [Code of Conduct](#) and adhere to it as much as possible.

For more information, see our study of [European tour operators' need for sustainable suppliers](#).

Dive equipment on-site

European dive travellers expect dive tourism providers to provide dive equipment on-site; for example, cylinders, regulators, wetsuits, fins and weight belts. Many airlines charge extra for carrying dive equipment, making it unattractive for divers to bring their own.

Tip:

Make sure that you can provide your guests with dive equipment and communicate this service on your website. Either provide the equipment yourself, or choose a reliable partner to do it for you.

Surface interval activities

Long-haul diving holidays need to include periods of non-diving, so-called surface intervals. This interval is to ensure that travellers are fit to dive and to prevent decompression problems.

After arriving at their dive destination, travellers need some pre-dive time for flight recovery. Divers also need to schedule sufficient surface intervals between dives. In addition, they need a surface interval of at least 24 hours before flying after diving. To prevent decompression problems, activities after diving should not involve an increase in altitude.

Tips:

Provide non-diving activities in which your guests can engage during surface intervals.

If your product offer includes activities at an increased altitude, clearly indicate which are suitable activities for surface intervals.

2. Traveller profile

The average dive traveller is between 33 and 55 years old. The majority is male, but [women are steadily catching up](#), from 34% in 2014 to 37% in 2016. Dive travellers generally have a relatively high income, are educated and lead an active, healthy lifestyle.

There are [three main segments of dive travellers](#):

Leisure divers

With around 70% of European dive travellers, leisure divers are the largest segment. They prefer to combine diving with non-diving activities at the destination and often stay at a resort. In addition to an attractive dive destination, they value comfort, culture, good-quality food and alternative day trips. They look for opportunities

to experience something new and different.

Depending on individual preferences, leisure divers may spend up to half of their holiday time on non-diving activities. Popular activities include tennis, golf, hiking, cycling and other water sports such as surfing or paddling. Other interesting options are safari tours, cultural tours or historical excursions. These activities can also be a suitable way for divers to spend their surface intervals.

Tip:

To attract this segment, you should provide quality equipment, comfort, good food and an attractive non-diving programme.

Passionate divers

Around 20% of European dive travellers are passionate divers. This segment consists of divers who are licensed or have taken dive courses. Such courses can be general experience-based, or they include areas of special interest such as underwater photography or wreck diving. Passionate divers often travel solo or with other divers. Diving itself is their main reason to go on holiday.

Passionate divers usually travel to a dive location in order to see specific sorts of fish or marine mammals. They dive as often as possible and do not care much about accommodation or cultural trips. Their basic needs consist of a clean room, good basic food, a hot shower and nice staff. These divers usually bring their own gear (excluding cylinders), for which they need a safe storage place.

Tip:

To target this segment, base your communication on the quality and uniqueness of your diving product. Provide a list of the rare species and special dives that you have to offer to passionate divers. Consider letting a diver write your content, so you speak the same language as your target customers.

Families and couples

Families and couples make up around 10% of European dive travellers. Usually, there is one diving enthusiastic, while the others like to dive only once or twice at most. Quality is very important to them. Dive travellers within this segment are generally able and willing to spend more on quality; for example, on accommodation or additional holiday activities. Families pretty much always want a pool at their accommodation.

Tips:

When targeting this segment, make sure that you focus on the quality of the overall package. Quality does not necessarily mean luxury. In general, this segment looks for something of better value than budget alternatives.

Cater to the needs of non-divers; for example, by offering accommodation with leisure facilities such as spas or yoga classes.

Be prepared for young divers among your guests, preferably through specialised diving instructors or guides. For more information, see [DAN's series on young divers](#), including [talking underwater](#) and [3](#)

ways to respect life underwater.

3. Which European markets offer opportunities for dive tourism?

Europe is a key source market

The United States of America and Europe are the main source markets for dive tourism. Although the American market is by far the largest, around a quarter of the 6 million dive travellers worldwide are European. The annual growth rate of the dive travel market is estimated at an impressive 16%. The most important markets within Europe are Italy, Germany, France and the United Kingdom.

European divers may take several diving holidays per year. On long-haul dive trips, they spend around € 400 per day on an average 10–14 day holiday. Divers from Germany, France and the United Kingdom generally spend more on their holidays than Italian divers. Especially German divers have a relatively high expenditure, because they prefer higher-quality accommodation.

Tip:

Focus on western European source markets such as Germany, France and the United Kingdom.

Popular dive destinations

The main dive regions for European dive travellers are the Red Sea, the Maldives, south-east Asia, the Mediterranean region and the Caribbean.

The most popular dive destinations in developing countries include:

- Egypt
- Thailand
- the Maldives
- Mexico
- Indonesia
- the Galapagos Islands

These destinations offer attractive underwater life, good air connections and pleasant weather conditions. They are especially popular during Europe's colder seasons, when short-haul destinations are less attractive. Geopolitical instability may continue to affect the tourism industry in some of these destinations, such as Egypt and the Maldives. These unfortunate circumstances can create opportunities for other, upcoming dive destinations.

Tip:

Clearly communicate the unique and authentic experience(s) that you can offer to dive travellers. This information makes you stand out from your competitors. Illustrate your story with visuals such as good-quality photos and videos.

For more information on European traveller numbers in general, see our study of [European demand for tourism in developing countries](#).

4. Which trends offer opportunities on the European market for dive tourism?

Dive demand is diversifying

Dive tourism was traditionally dominated by diving in pristine environments. However, European divers are increasingly seeking exciting dive expeditions. They look for unique diving sites or experiences. Examples are shark diving in the Galapagos or South Africa and ice diving in the Arctic.

Another thriving form of diving focuses on underwater photography. Unusual dives can be especially suitable for this aim, provided that the divers are well instructed on what they can and cannot do.

Tips:

Identify what makes diving at your destination unique, or what kind of extras could be added. Are there wrecks to dive, ice, or sharks?

Offer underwater photography courses.

Instruct divers on the dos and don'ts to preserve the underwater environment. For example, you can use the [Green Fins Underwater Photography Guidelines](#).

Senior travellers are discovering diving

The growing European population of people aged 55+ is becoming an important target segment for tourism. The current generation of seniors is living longer and healthier than before. This fact drives a more active lifestyle, leading seniors to become increasingly interested in diving. As an underwater sport, diving is a form of low-impact exercise. This aspect makes it a particularly suitable sport for seniors, provided that they are [physically and mentally fit enough](#). If so, diving actually offers health benefits.

Senior divers are flexible. They are relatively wealthy and are not bound to the traditional holiday seasons. They usually travel with other senior travellers or within multigenerational families. Currently, [around 22% of regular divers are 55+](#). This percentage is expected to increase, as the European senior population continues to grow and more seniors discover diving.

Tips:

Offer diving tours especially for seniors and/or multigenerational families; for example, dives at limited depths, with relatively slow descends and ascends.

Provide patient instructors, who are experienced with senior divers.

Ask senior divers to fill out a [medical statement](#) to ensure that they are fit to dive. Inform potential customers in advance; for example, by publishing the form on your website. This information allows them to assess whether they qualify for your diving tours before booking.

For more general information, see our study of [Senior travel](#).

The influence of online reviews and visual storytelling is growing

European travellers increasingly research and plan their trip online. To gather information and share experiences, they use review sites, social media, travel forums and blogs. Online reviews and feedback from fellow travellers have become important sources of information. This type of User Generated Content is key, as [83% of consumers trust earned media above all other forms of advertising](#).

Visual storytelling is especially important for diving and adventure tourism; for example, on platforms such as Instagram. In fact, [72% of adventure travel professionals consider visuals core to how they communicate and tell their brand's story](#). More than two thirds of them expect photography and video content to become even more important in the coming years.

- Maintain a strong internet presence and online marketing strategy, including social media.
- Use photos and videos to bring your story alive and showcase your unique diving opportunities. For more information, watch this [webinar series on visual communication in adventure travel](#) by the Adventure Travel Trade Association (ATTA) and Libris.
- Use current customers as ambassadors for your company and area. Encourage them to share their experiences and visuals on social media, write blogs and review your company.
- For more information, see our [10 tips for online success](#).

Diving applications are on the rise

Mobile technology is also having an effect on dive tourism. Dive travellers increasingly use diving applications (apps) on their mobile devices. The most popular apps are practical in nature; for example, with a logbook function, tide tables or nitrox tools. Some allow you to add your underwater photography or easily share your logs on social media.

Tips:

Inform your guests about the best diving app(s) for your area. For an overview of mobile diving apps, see [ScubaDiving's app reviews](#).

If it does not exist yet, develop a diving app for your destination. You can try to team up with other stakeholders in your area and develop the app together. A good example of a local diving app is [Pearls of the Caribbean](#), developed jointly by three regional dive locations.

For more general industry trends, see our study of [market trends](#) for European tourism.

5. Which requirements should dive tourism comply with to be allowed on the European market?

For general tourism requirements, see our study of [which requirements your services should comply with to attract European tourists](#).

Some additional requirements apply to diving tourism.

Dive resort/centre certification

Due to the relatively high risks involved in diving, reliability is of key importance. Dive standards and certification are useful tools for European dive tour operators to select reliable, professional partners.

Dive centres in developing countries should fulfil the minimum requirements of local or preferably international dive organisations. These organisations issue dive certificates to qualified divers. The best-known is the

Professional Association of Diving Instructors, [PADI](#). They allow their member resorts/centres around the world to issue certificates on their behalf. Meeting their safety standards is a must, as most European tour operators will only work with certified businesses.

Tips:

Become certified through an internationally recognised organisation for dive training; for example, by becoming a [PADI Retailer or Resort](#).

Become a member of as many relevant national and international sector associations and networks as possible; for example, your own country's tourism trade association.

Diver certification or C-card

A C-card is a diver certification document (usually a wallet-size plastic card), issued by a [diver certification organisation](#). It certifies that a diver has completed the training required for a specific level of diving ability and knowledge. This certification card may be required to prove a diver's qualifications when booking a dive trip. As a result, this information protects untrained people and minimises the potential legal liability of the dive tour provider.

Tips:

Require divers to carry a C-card at a level that matches the difficulty of the dive.

Offer training courses for beginners or insufficiently certified divers.

Clearly communicate your diver certification requirements, including to potential partners, as it increases your professional image and reliability.

Voluntary diving standards

The [ISO 24803](#) standard specifies performance requirements for recreational providers of dive services. It includes scuba diver training and education, introductory diving activities, guided dives and diving equipment rental. [ISO 24801](#) and [ISO 24802](#) focus on the training of scuba divers and instructors. These standards can serve as a guideline to improve your safety performance and training programme.

In addition, ISO is developing voluntary sustainability standards for the industry. [ISO/CD 21416](#) provides requirements for and guidance on sustainable practices in recreational diving. [ISO/CD 21417](#) sets requirements for training in environmental awareness for recreational divers.

Tips:

Study the ISO standards on dive tourism. If ISO standards are not financially feasible for your business, use the standards as a guideline.

Keep track of developments in sustainable diving standards to improve your performance.

Check for possible voluntary standards in your target markets.

6. What competition do you face on the European market for dive tourism?

There are [10 key competitiveness factors for dive tourism](#):

1. diving operations;
2. risk perception;
3. diving conditions;
4. price;
5. destination management;
6. encounters with large marine wildlife;
7. diving training;
8. technical diving;
9. general tourist attractions;
10. visa policy.

The most important are a destination's diving operations. These operations consist of professionalism, environmental commitment, friendly staff, a casual atmosphere, dive information and briefings. You can influence these aspects relatively easily to improve your competitiveness.

The relevance of these competitiveness factors vary slightly depending on the level of the diver. For inexperienced divers, the availability of diving training is relatively important. Highly experienced divers are more interested in technical diving, which includes wreck or cave diving and deep diving.

Tip:

Use these competitiveness factors to analyse the competitiveness of your destination and company. Improve your performance on aspects that you can influence. Team up with other local stakeholders to try and improve your competitiveness on a destination level.

7. Through which channels can you get your dive tourism products on the European market?

Focus on smaller specialised tour operators

Smaller European tour operators specialised in dive tourism or in your destination offer the best opportunities. You can identify them via trade associations, events and databases.

For example:

- [Boot Düsseldorf](#) – annual water sports trade fair, January, Düsseldorf;
- [DIVE](#) – annual diving industry event, October, Birmingham;
- [Dive International](#) – directory of dive tour operators;
- [EUDI European Dive Show](#) – annual diving industry event, March, Bologna;
- [ITB](#) – annual tourism trade fair, March, Berlin;
- [Salon de la Plongée](#) – annual diving industry event, January, Paris;
- [World Travel Market](#) – annual tourism trade fair, November, London.

Business through dive membership organisations

Many European divers are organised in dive centres or dive clubs. These organisations can be a valuable channel to access the European dive tourism market. As part of the membership, they offer their members

diving trips to sites all over the world. This situation means that they can give you direct access to potential customers looking for a trustworthy dive holiday.

Almost every European country has its own dive membership organisation. The main organisations include:

- [VDST](#) – Germany
- [BSAC](#) – the United Kingdom
- [FFESSM](#) – France
- [FIAS](#) – Italy

Tips:

Approach dive membership organisations with specific offers for their members.

Use dive association magazines to promote your destination through an advertorial or article about your destination.

Generating direct sales

A growing number of European divers are bypassing outbound tour operators. Because they still need a local dive guide, they contact dive centres in the destination country directly. To reach divers, you can promote your product on dive tourism websites/portals.

For instance:

- [DIVE](#)
- [Scuba Diving](#)
- [Taucher.Net](#) (German)

8. What are the end-market prices for dive tourism products?

Travellers have many destinations and types of holiday from which to choose. This variety makes tourism a relatively price-sensitive and competitive industry. The price of a long-haul trip consists of three dimensions:

1. the exchange rate between the currencies in the country of origin and the destination country;
2. the cost of transport to and from the destination country;
3. the price of goods and services that the traveller consumes in the destination country.

European tour operators do not disclose the purchasing prices of their tourism products. According to industry experts, their margins vary between 10 and 25%. The prices of holiday packages vary widely, since they depend on a lot of factors such as:

- availability
- destination
- modes of transport
- period of travel
- number of travellers
- length of stay
- type of accommodation
- activities included

Tips:


Check which countries have cheap direct flights to your destination; for instance, at [Skyscanner](#). This availability gives you a competitive advantage in those countries.

You can compare prices for adventure travel products online; for example, at [Responsible Travel](#).


Tourism Boost has some useful [online tools for pricing tours and accommodation](#). These tools help you to determine the break-even point and the ideal retail price of your tourism product.

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