CBI Product Factsheet:

Dive tourism from Europe
Introduction

Europe is the world’s largest source market for dive tourism. Dive tourism is a well-established and mature segment in many European countries. It has developed from a specialist activity into one of the most popular water sports. The market for leisure divers is well organised, as most divers in Europe are members of a dive club which facilitates targeted marketing. These aspects combined make Europe an interesting target market for dive tourism providers in Developing Countries.

Product description

Product definition

Dive tourism refers to trips or holidays of which the main purpose is to take part in scuba diving activities. It includes an increasingly wide range of recreational dive activities. Dive tourism is regarded as a niche market of adventure or sports tourism.

Traveller profile

Two-thirds of all European divers are male, according to the Professional Association of Diving Instructors (PADI). Divers generally have a high household income, tend to be highly educated and lead an active, healthy lifestyle. The average dive holiday of European citizens has a duration of 10 days.

Three main segments of dive travellers can be distinguished:

Leisure divers

This is the largest segment consisting of approximately 70% of all European dive travellers. They prefer to combine diving with non-diving activities at the destination and often stay at a resort. Besides an attractive dive destination, comfort, culture, good quality food and alternative day trips are important to them. Besides diving, they look for opportunities to experience something new and different. Depending on individual preferences, travellers in this segment could spend up to 40-50% of their holiday time on non-diving activities. Around 50% of them bring their own gear.

Tip:
- To cater to the needs of this segment, make sure you have good quality gear available and provide comfort, good food and an attractive non-diving program. This could for example be safari tours, cultural tours or historical excursions.

Passionate divers

This segment comprises around 20% of European dive travellers. It consists of divers who have taken dive courses or who are licensed. Such courses include areas of special interest (for example underwater photography or wreck diving) or general experience-based courses. More than two-thirds of the passionate divers are male, around 75% of whom are married. They are largely represented in the age group of 46-55 years old and predominantly travel solo or with other dive passionates. Diving itself is their main reason to go on holiday. They are like bird watchers that want to see a specific list of animals. They travel to a dive location to see specific sorts of fish or marine mammals. When they are there, they will dive as often as possible. They 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 desire a safe storage place.

Tip:
- If you want to target this segment, tailor your communication around the quality and uniqueness of your diving product. Provide a list of species or special dives that can be found or performed at your location. Consider letting a diver write the content of your website so that you speak the same language as your target customers.

Families and couples

This segment makes up for around 10% of all European dive travellers. Usually there is one enthusiastic diver and one that likes to dive only once or twice, or who is not a diver at all. Quality is very important to them. As dive travellers within this segment tend to have relatively high disposable incomes, they are generally able and willing to spend more on quality of
some important holiday elements, such as flight connections, accommodation or holiday activities. Families pretty much always want a pool at their accommodation.

Tips:
- When targeting this segment, make sure you focus on quality of the overall package. Quality does not necessarily mean luxury. In general, this segment looks for something of superior value than budget alternatives.
- Also take into account the needs of non-divers, for example accommodation with more leisure facilities such as spas or yoga classes.

Product specifications

The following product specifications are important for European dive travellers:

Health and safety measures

European dive travellers consider health and safety standards of dive tourism providers very important. Most European dive tour operators evaluate their partners based on the level of service quality and safety. A physical inspection of dive equipment and facilities in destination countries usually takes place before closing a business deal. For more information about standards and certification, refer to the section 'What requirements should dive tourism comply with to be allowed on the European market?' of this document.

Tip:
- Maintain high standards in the use of equipment and train staff regularly on safety, maintenance and interaction with customers.

Sustainability

Sustainability is very important for many European dive travellers, especially for divers in Western and Northern European countries. A dive site that is not managed sustainably will deteriorate and eventually become very unattractive for diving. For example, German and Dutch divers are very willing to pay a fee for a visit to a marine park or national park if it is clear that the fee is well spent on the quality of the dive site. Divers are used to paying this fee on the spot and according to tour operators it gives them a good feeling about the dive location.

Tips:
- Do not be afraid to let customers pay a fee for maintaining dive sites in a sustainable manner. You may also try to involve your customers in sustainable activities such as a beach or reef clean up.
- Show your customers that you find sustainability important. You could for example introduce a towel reuse program and waste separation, install water saving equipment, switch to LED lights or install solar panels. Take a look at http://www.wikihow.com/Create-a-Green-Hotel for more ideas about creating a green accommodation.

Destination requirements

An attractive dive destination is one that provides a healthy marine environment, information trails or information provided for the trip, a variety of different diving sites (e.g. wreck sites, wall sites, coral reefs), good visibility and an abundance of wildlife.

Tip:
- Mention as many specifications of your dive destination as possible on your website. Give information about currents, drop offs, rocks, sand or coral, the dive conditions and the depths of the dive spots.

Technical requirements

European dive travellers expect dive tourism providers to be able to provide dive equipment (cylinders, regulators, wetsuits, fins, weight belts etc.), as many airlines charge extra for carrying dive equipment.
Combination packages

Long haul diving holidays require a few days of non-diving, because of the altitude of flying and the necessary surface intervals to prevent decompression problems. A few days of non-diving activities are therefore important. Non-diving activities that active divers like to participate in are skiing, snorkelling, tennis, golf and cycling (mountain and road), according to 2014 research of the Diving Equipment & Marketing Association (DEMA).

What is the demand for dive tourism from Europe?

United Kingdom, Germany and France are the largest source markets

The United Kingdom, Germany and France are the largest source markets in Europe for trips to Developing Countries in general (Figure 1). These countries also represent the largest source markets for dive tourism in particular. United Kingdom divers are an interesting target market, as they are most likely to take an overseas dive holiday, whereas German divers are interesting because they spend significantly more on a dive holiday than many other European divers. More importantly, there is an increase in divers from these countries who travel to less developed regions.

Figure 1: General trips to Developing Countries, top 15 European countries 2009–2013, in millions

Source: World Tourism Organisation (UNWTO)

Small, but steady growth

Globally, the number of certified PADI divers (Professional Association of Diving Instructors) has shown a small but steady growth over the past 10 years. PADI certified divers make up around 70% of the total dive market. There are approximately 3.2 million active divers in Europe. Each year, an estimated 826,000 of these divers tend to go on a dive holiday, according to the Recreational Scuba Training Council (RSTC).
Popular dive destinations

For European dive travellers, Egypt, Thailand, the Maldives, Mexico, Indonesia and the Galapagos Islands are among the most popular dive destinations. This is because of their attractive underwater life, good air connections and attractive weather. Although Egypt has suffered from an unstable political climate for the last few years, which was negatively influencing dive tourism in their country, it is currently regaining ground.

Tip:
- Highlight in your marketing activities the unique, authentic experience(s) that dive travellers will have with your product/service. Differentiate this experience from the experience(s) they can find elsewhere, so that you can distinguish yourself from competitors. Furthermore, enhance this experience by using visuals like good quality photos and videos.

For information on tourism trade statistics and macro-economic indicators in the European market in general, refer to CBI’s ‘Trade Statistics’ for Tourism.

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

Mobile applications for divers

The increasing number of available mobile applications has also reached the diving industry. The most popular apps are practical in nature, for example those that also function as a log book, show tide tables, or have nitrox tools. A good example of a local diving app is Pearls of the Caribbean, a mobile application developed by three regional dive locations together. For an overview of mobile applications for divers, go to Scubadiving.com.

Tip:
- Take a look at existing mobile applications for divers and see if such applications could be interesting for your business as well.

Diversification

Diving is traditionally dominated by diving in pristine environments. However, European divers are increasingly seeking exciting dive expeditions. This market has experienced a growing interest. Examples are shark diving in the Galapagos or South Africa and ice diving in the Arctic. Another thriving trend in diving is underwater photography.

Tip:
- Identify what kind of extras could be added to dives at your location. Are there wrecks to dive, ice, or sharks? Or consider offering underwater photography courses.

For information on tourism market trends in the European market in general, refer to CBI’s ‘Trends’ for Tourism.

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

Musts

No legal European requirements

As long haul dive tourism is offered outside the European market there are no legal European requirements applicable.

Tip:
- Although European partners will not pass on legal requirements, you have to comply with the legal requirements in your own country.
**Additional requirements**

**Reliability**

European dive tour operators are looking for reliable, professional partners. In diving, reliability is very important, especially in the form of dive standards and certification. Dive centres in Developing Countries should fulfil the minimum requirements of local, or preferably international, dive organisations, such as the Professional Association of Diving Instructors (PADI), National Association of Underwater Instructors (NAUI), Confédération Mondiale des Activités Subaquatiques (CMAS) or British Sub Aqua Club (BSAC). Such organisations issue dive certificates for qualified divers and allow qualified/member dive resorts and dive centres around the world to issue certificates on their behalf. It is a must for your business to meet one of these (safety) standards, as most European tour operators will only do business with certified businesses due to the high risks involved in diving.

**Tips:**
- Become a dive resort or dive centre certified by an internationally recognised dive training organisation, or work with certified dive resorts or dive centres. Internationally well-known ones are registered under the World Recreational Scuba Training Council (WRSTC) among which PADI is the most popular. Most organisations have establishments in many countries around the world. Contact them and ask for their minimum requirements and what benefits you might get from becoming a member.
- 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.

**Liability**

Many European travellers contract travel insurance before going on a holiday. However, European tour operators increasingly ask their partners for liability insurance to cover possible damage and accidents of their customers, especially when it concerns travel outside of Europe. This is because their own liability insurance does often not cover damage caused by third parties. Tourism providers in Developing Countries that have such insurance have a large advantage over those who have not. However, in many Developing Countries it is difficult to get liability insurance as they are not offered yet.

**Tips:**
- Communicate to your customers the importance of contracting travel insurance, especially if your company does not have liability insurance.
- Contract liability insurance and communicate that you have such insurance. If it is not possible to get liability insurance in your country, you should constantly push with your authorities and trade associations to make such insurance possible. Also discuss this with (potential) partners as they might have some influence as well.

**C-card**

C-card is a document (usually a wallet size plastic card) issued by a dive certification organisation. The card recognises that the bearer has completed a course of training as required by the issuing organisation, and represents a defined level of ability and knowledge of scuba diving. Divers carry a qualification record or a certification card which may be required to prove their qualifications when booking a dive trip, renting equipment or filling diving cylinders. This is mainly done to minimise the potential legal liability of the vendor, but may also prevent untrained people from exposing themselves to hazards of which they are not aware.

**Tip:**
- Check whether your customers have a C-Card before letting them dive to decrease the chance of accidents and minimise liability. Also mention this to potential partners as it increases your professional image and reliability.

**ISO standards for dive centres**

The standard EN 14467 / ISO 24803 specifies performance requirements for recreational dive service providers, including those offering scuba diver training and education, guided dives and diving equipment rental or diver or instructor qualifications. Such ISO standards, as well as the ISO 24801 and 24802 standards, can serve as a guideline to improve your safety measures or dive training curriculum.
European tour operators do not directly require sustainability labels, but if they can choose between sustainable businesses and comparable business without a label, they will often choose the sustainable option. Integrating sustainable elements into your product can therefore give you a competitive advantage. There are many different labels available for the global, European and local markets, which makes it difficult to choose or recognise a label. Examples of global credible sustainable and/or green tourism certification programs are Green Globe, Rainforest Alliance and Travelife. There are also local sustainability initiatives, for example Smartvoyager in Ecuador, CST in Costa Rica and Green Lotus in Vietnam. In addition, there are also sustainability/eco labels specifically for beaches and marinas, such as Blue Flag.

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For information on tourism buyer requirements in the European market in general, refer to CBI’s ‘European Buyer Requirements’ for Tourism.

What competition do I face on the European dive tourism market?

Competition on the European dive tourism market is based on the same aspects as competition on the long haul tourism market in general. Therefore, refer to CBI’s ‘Competition’ for Tourism for more insights into your competition.

Also refer to CBI’s ‘Top 10 Tips for Doing Business with European Buyers’ for tips on how to prepare your first contact with European buyers or how to improve your existing relationship with European buyers to gain a competitive edge.

What do the trade channels and interesting market segments look like in the European market for dive tourism?

The trade structure for dive tourism from Europe does not differ significantly from the trade structure for European tourism to Developing Countries in general. The most important trade channels for dive tourism providers in Developing Countries are local inbound tour operators, specialised European dive tour operators, and European dive centres and clubs that organise dive holidays. Refer to Figure 1 in CBI’s ‘Trade Channels and Segments’ for Tourism for an overview of the general trade structure for tourism.

Focus on specialised tour operators

These are generally smaller tour operators that work on a personal basis. They mostly offer tailor-made tours (FIT) to their customers and need reliable local partners such as inbound tour operators or Destination Management Companies to select packages/tours for them and help them organise the trips. Specialised dive tour operators prefer to meet potential partners at a trade fair, but it is also possible to contact them by e-mail.

Tip:
- Visit the main dive trade fairs in your target market. Interesting trade fairs to visit are Boot Düsseldorf or the International Travel Trade Show (ITB) in Germany, the Big Scuba Show, London International Dive Show or WTM in the United Kingdom and the International Dive Show in France.

Tips:
- Study the ISO standards on dive tourism. Visit ISO 24803 for more information. If you find ISO standards not financially feasible for your business, consider using the standards as a guideline.
- Familiarise yourself with the requirements of sustainability certification to understand what is expected from suppliers. Consequently, integrate sustainable best practices into your product, for example policies for efficient electricity, water consumption and waste management. Also mention your concern for sustainability in your promotion. For more information, also refer to CBI’s Product Factsheet ‘European tour operators and their need for sustainable suppliers in Developing Countries’.
- Consider applying for sustainable certification to help you stand out from competitors. Find out if your country has its own sustainability label and apply for it. Make sure that the logo is visible on your website and that your company is visible on the website of the certification body.
- For an overview of other relevant standards for tourism, also check ITC's Standardsmap.

For information on tourism buyer requirements in the European market in general, refer to CBI’s ‘European Buyer Requirements’ for Tourism.
### Business through associations

Many European divers are organised in dive centres or dive clubs. As part of the membership, they offer their members diving trips to specific sites all over the world. For dive tourism providers in Developing Countries, there is great value in approaching such clubs, as they offer direct access to potential customers who are looking for a trustworthy dive holiday.

**Tips:**

- Approach dive membership organisations with specific offers for their members. Almost every European country has its own dive membership organisation. In Germany for example, this is the Association of German Sports Divers, in the United Kingdom it is the British Sub-Aqua Club and in France it is the FFESSM.
- Use magazines of dive associations to promote your destination through an advertorial or article about your destination.

### Direct sales

A growing number of European divers are bypassing outbound tour operators. Because they still need to be accompanied by a local dive guide, they contact dive centres in the destination country directly. European divers generally search for holidays via online communities, which have a high viewership among dive travellers. It is recommended to focus on the diving market itself and not to look too far into general tourism marketing channels, as diving is a specialised market that predominantly attracts people that are actively looking for dive holidays.

**Tips:**

- Have a professional, high quality website with quality photos and videos. Focus on what makes your diving area so unique. Also invest in online promotion such as Search Engine Optimisation, as having a good website is useless if customers are not able to find it.
- When doing business online, it is essential that local companies offer (inter)nationally accepted and secure methods of payment. If you provide the service of online payment, make sure you use (inter)nationally accepted and secure methods of payment.

For information on tourism market channels and segments in the European market in general, refer to CBI’s ‘Trade Channels and Segments’ for Tourism.

Also refer to CBI’s ‘Finding Buyers’ for tips on locating buyers in the European market.

### Useful sources

- Professional Association of Diving Instructors (PADI) - [http://www.padi.com](http://www.padi.com) - the worlds most recognised dive training organisation. Check out their safety measures and standards and use them as benchmark for your business operation.
- World Recreational Scuba Training Council (WRSTC) - [http://www.wrstc.com](http://www.wrstc.com) - organisation that sets worldwide safety of recreational diving and minimum training standards.

For all CBI’s tourism related market intelligence documents, go to CBI’s ‘Market Intelligence Platform for Tourism’.