



SOUTH PACIFIC

Dive Market

STUDY REPORT 2014



South Pacific Tourism
ORGANISATION



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Pacific Regional Tourism Capacity Building Programme

SOUTH PACIFIC NICHE MARKET REPORT



DIVE TOURISM

March 2014

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EXECUTIVE SUMMARY

Where do divers come from?



Global market
10 million
active divers



Biggest markets:



USA



Italy



Germany

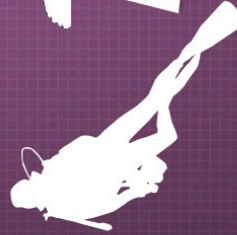


France



UK

What does a diving holiday involve?



Liveaboard boats or
Resort-based holidays



7-10
days

Average
duration:
7-10 days

Average cost:
from US\$ 2,500
excluding flights



Who goes on diving holidays to the South Pacific?

- Average age: 35 to 65
- Male 66% Female 33%
- Singles, couples or groups of friends
- Adventure seeking
- Travel regularly
- Disposable income



What's special about diving in the South Pacific?



"Best in the world"

Quality and variety of marine life and dive sites
Unpolluted, untouched by civilisation



For Europe: "A trophy destination"



For Australia and New Zealand:
Good value, close to home

Top destinations:



Fiji – soft corals, Astrolabe reef

FSM – wrecks

Palau – wrecks, walls, sharks

PNG – pristine dive sites, wrecks, diverse marine life

Potential for:



Solomon Islands – excellent wrecks but hard to get to

Tonga – current issues with flights

Vanuatu – wrecks, limited number of dive operators

EXECUTIVE SUMMARY

How do divers research their holidays?



How do divers book their holidays?



Booking lead times:
Research – 2 years ahead **Book** – 1+ years ahead, longer for liveaboards

Competing Destinations

Regional Competition:

- Philippines** – rapidly growing in popularity, high quality diving, whale sharks, good value, easily accessible
- Indonesia** – wide range of sites and resorts
- Malaysia** – easily accessible, good value
- Maldives** – good for liveaboards
- Australia** – expensive due to exchange rate, mostly direct bookings
- Guam** – popular with Japanese

Global competition:

- Galapagos** – trophy destination
- Caribbean** – popular from East Coast USA
- Red Sea** – popular from Europe

Constraints

Opportunities

“Dive operators are doing a great job, they are let down by national carriers”

Regional air schedules – inconvenient, unreliable, hard to work with

Improve reliability, value for money and customer care

Make regional flight schedules easily accessible

Low awareness of dive opportunities beyond Fiji, FSM, Palau

Differentiate: Identify which islands are good for which type of diving and promote them e.g. wrecks, wall, whales, manta rays, jellyfish

Build customer awareness of diving opportunities other destinations

Small niche market

Develop other activities to complement diving

Recommendations for marketing diving holidays

Fragmented market

Target dive magazines, dive clubs, media used by divers

Broaden product knowledge: “specialist knowledge is the best way to sell”

Provide international operators with good quality dive information

Provide well-informed contact at regional or national tourist board

Fam trips to lesser-known destinations

Run more events like the ‘Fiji Dive Fiesta’ – “it’s excellent”

Co-op marketing with tour operators. Call to Action drives bookings

Benefits of Dive Tourism:

- Promotes marine conservation
- Uses local accommodation
- Enhances knowledge of natural and cultural heritage – through historic wreck diving, interaction with local people

Recommendations:

- Use dive tourism to drive responsible tourism in destinations where there’s a good dive offer
- Research and develop snorkelling tourism to broaden audience



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The authors would like to thank the numerous tour operators and travel businesses across Europe, North American, Japan, Australia and New Zealand who gave us their time and advice to assist us with this study and to enable us to understand their markets.

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ABBREVIATIONS

AU\$	Australian Dollar	PADI	Professional Association of Diving Instructors
PNG	Papua New Guinea	NZ\$	New Zealand Dollar
US\$	American Dollar	USP	Unique Selling Point
UK	United Kingdom		



1. INTRODUCTION

Study Context

This study is one of a series of three market studies into major niche tourism markets: dive, backpacker and cultural heritage and historic tourism.

Objectives

These market studies have been designed and carried out to provide practical and actionable market intelligence and guidance to Pacific tourism operators wishing to penetrate these niche markets.

Methodology

The research for this study has involved extensive desk research and primary research with 80 tour operators and tourism businesses in Europe (UK, Germany, France, Italy, Sweden), North America (USA and Canada), Japan, Australia and New Zealand. A mixture of face-to-face and telephone Interviews were conducted together with an online survey.

Definition of Dive Tourism

Dive tourism encompasses trips for which the main purpose is to experience the underwater attractions of a holiday destination. This comes in the form of scuba diving using specialist underwater breathing apparatus, usually an oxygen cylinder and breathing regulator. Diving in freshwater locations as well as in the sea is included but all types of snorkeling are excluded.

Most commercial operators will only take customers diving if they possess a diving qualification; some holidays include training for certification as part of the trip. The five most common diving certificates are as follows:

- Professional Association of Diving Instructors (PADI) – US-based
- Scuba Schools International (SSI) – US based
- National Association of Underwater Instructors (NAUI) – US-based
- British Sub-Aqua Club (BSAC) – UK-based
- Confederation Mondiale des Activities Subaquatiques (CMAS) – Europe-based

2. TOURISM TO THE SOUTH PACIFIC

What's In This Section?

- *This section provides an overview of tourism in the South Pacific in 2012. The same data is provided in each of the three niche market reports: backpacking, cultural heritage tourism and diving, to provide a context for each niche market.*

2.1 Tourism Performance in 2012

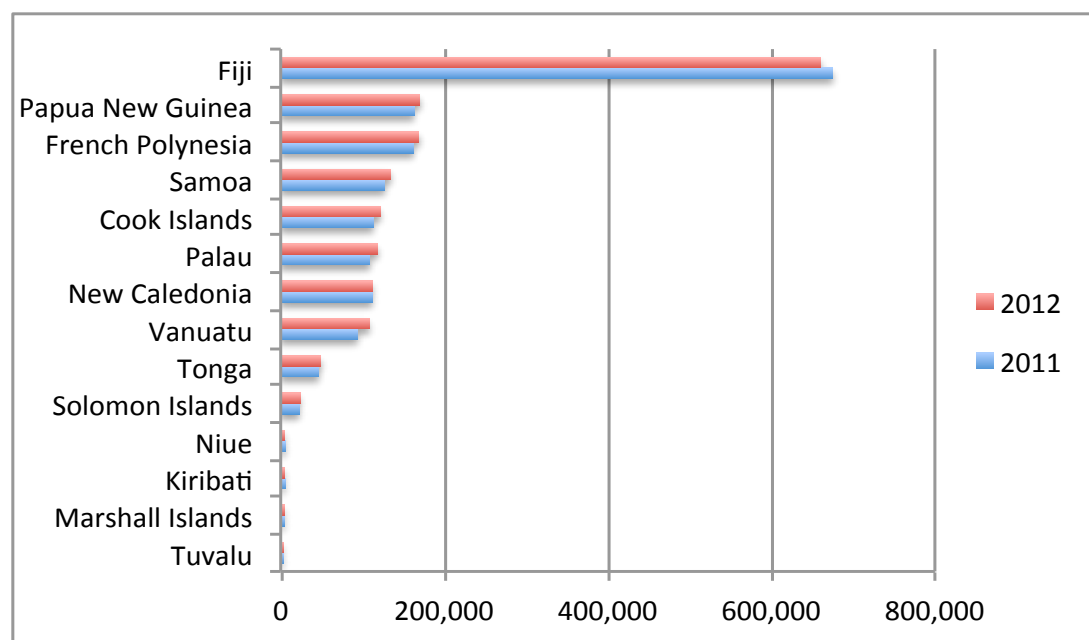
In 2012 the total number of international visitors to the South Pacific countries increased by 2.5%, compared to 2011. The five countries receiving the highest number of international arrivals, for all purposes, during 2012 were Fiji, Papua New Guinea, French Polynesia, Samoa and the Cook Islands.

Fiji continues to attract the largest number of visitors (660,600) although it saw a 2% drop during 2012. The disruption of international flights caused by cyclones Evans and Freda in December contributed to this decline. Other countries that saw a fall in arrivals were Niue (-17%) and Tuvalu (-15%).

The countries that experienced the largest percentage growth during 2012 were Vanuatu (15%), Palau (9%), Cook Islands (8%), Tonga (7%) and Samoa (5%).

In the first quarter of 2013, compared to the same period in 2012, visitor numbers to Fiji continued drop (5%). Samoa also saw a noticeable decline (10%) during the quarter, while Kiribati (39%), the Marshall Islands (23%) and Niue (21%) experienced the largest percentage increases in visitors.

Figure 1: International Arrivals to Pacific ACP and SPTO Countries



Source: SPTO

Figure 2: International Visitor Arrivals to Pacific ACP and SPTO member countries Quarter 1, 2012 and Quarter 1, 2013

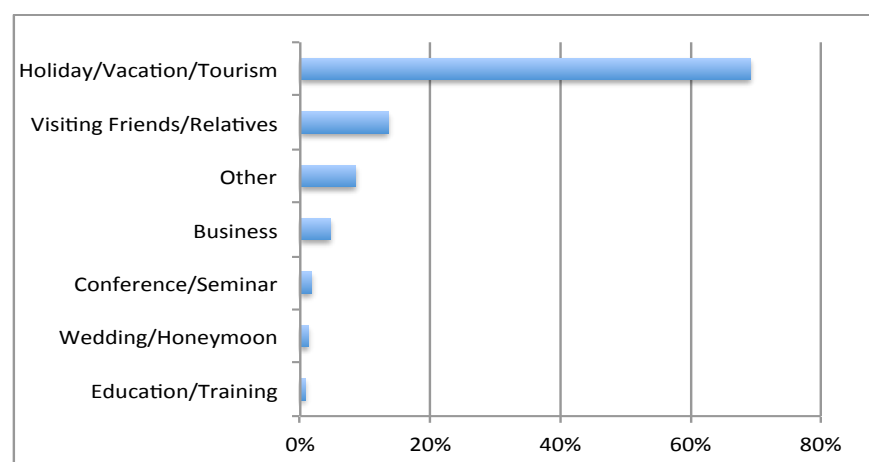
Country	2012 Q1	2013 Q1	Difference	% change 2012 to 2013
Fiji	136,421	129,591	-6,830	-5.0%
French Polynesia	34,836	36,248	1,412	4.0%
Palau	31,647	31,828	181	0.6%
Papua New Guinea	25,238	25,341	103	-0.4%
New Caledonia	25,732	24,289	-1,443	-5.6%
Samoa	25,935	23,297	-2,638	-10.2%
Cook Islands	20,567	20,618	51	0.3%
Vanuatu	19,798	19,520	-278	-1.4%
Tonga	7,913	8,050	137	1.7%
Solomon Islands	4,651	4,541	-110	-2.4%
Kiribati	1,202	1,655	453	38.5%
Marshall Islands	945	1,166	221	23.4%
Niue	660	798	138	20.9%
Tuvalu	238	247	9	3.8%
Total	335,783	327,189	-8,594	-2.6%

Source: SPTO, *Tourist Arrivals to Pacific ACP & SPTO Member Countries, Quarter 1, 2013*

2.2 Tourist Purpose of Visit

Holidays are the reason why 69% of visitors travel to the SPTO member countries, however this varies from country to country.

Figure 3: Purpose of Visit to SPTO member countries in 2012



Source: SPTO

Leisure travel accounts for more than 70% of visitors to the Cook Islands, Fiji, French Polynesia, Micronesia, Palau and Vanuatu.

In New Caledonia and Niue leisure is also the main motivation for visitors travelling to these countries, with around half of visitors coming on holiday.

Samoa attracts as many people visiting their family and friends as those who visit on for a holiday.

In Papua New Guinea, business and employment are the main reasons for visiting the country, with only around 20% of visitors travelling to the country for a holiday.

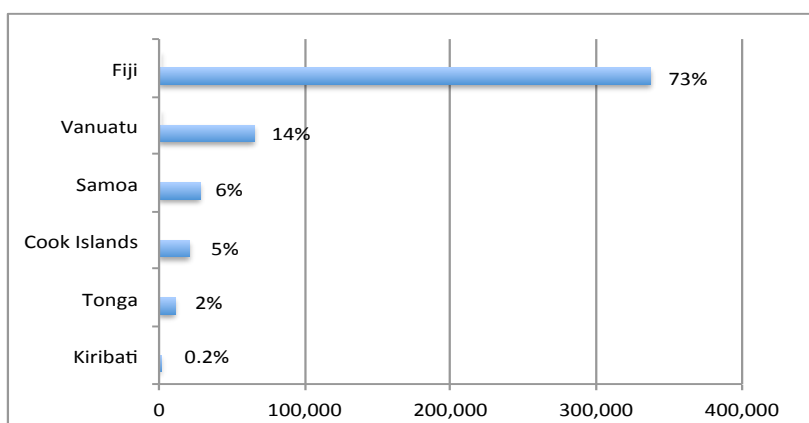
2.3 Source Tourism Markets and Arrivals to South Pacific Countries

The visitor arrivals by source market during 2012 are summarised in the charts below, highlighting the main South Pacific destinations for each source market included in this study.

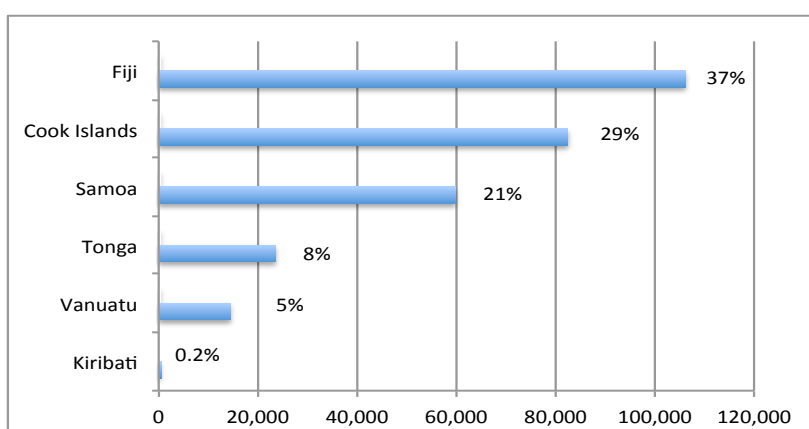
The breakdown of arrivals for the largest South Pacific leisure markets – the Cook Islands, Fiji, Kiribati, Samoa, Tonga and Vanuatu – are also illustrated below.

Arrivals from Key Source Markets

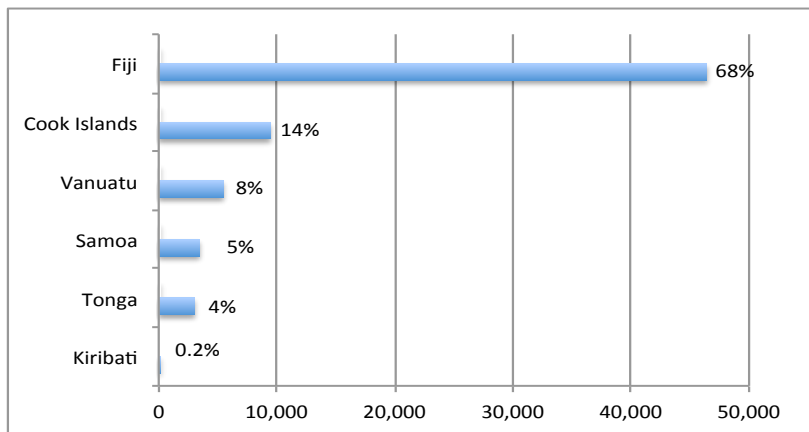
Arrivals from Australia



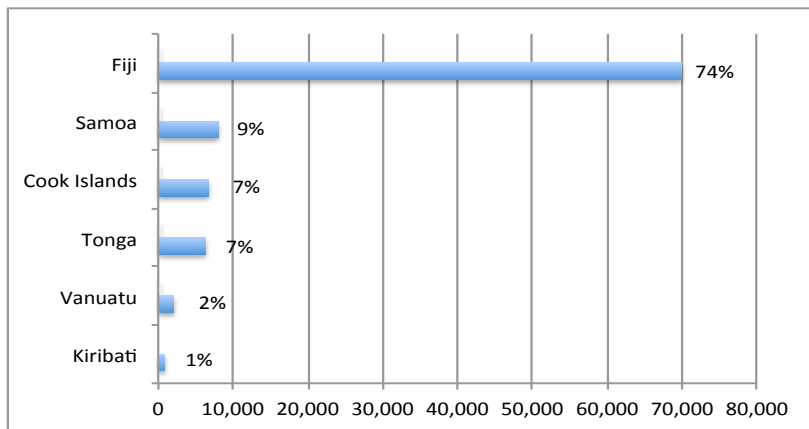
Arrivals from New Zealand



Arrivals from Europe

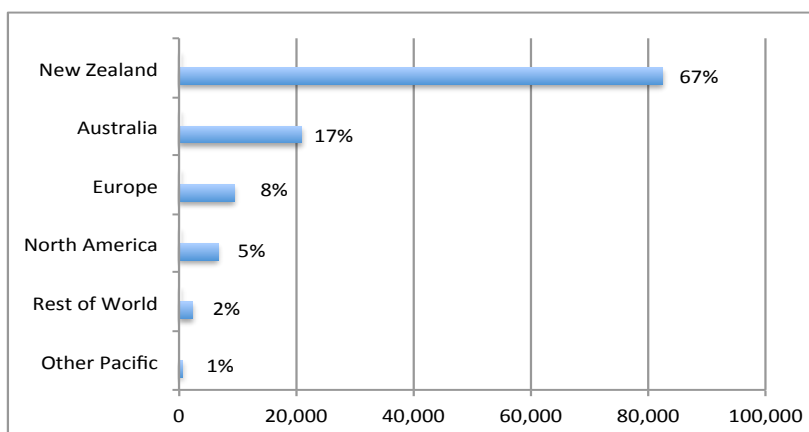


Arrivals from North America

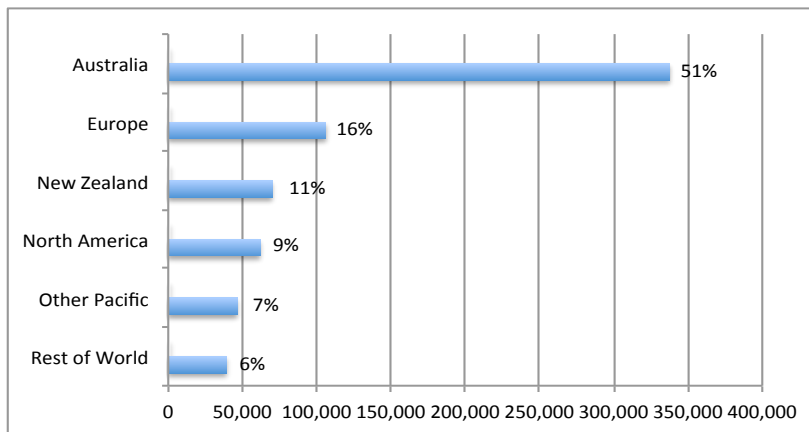


Arrivals to South Pacific Countries

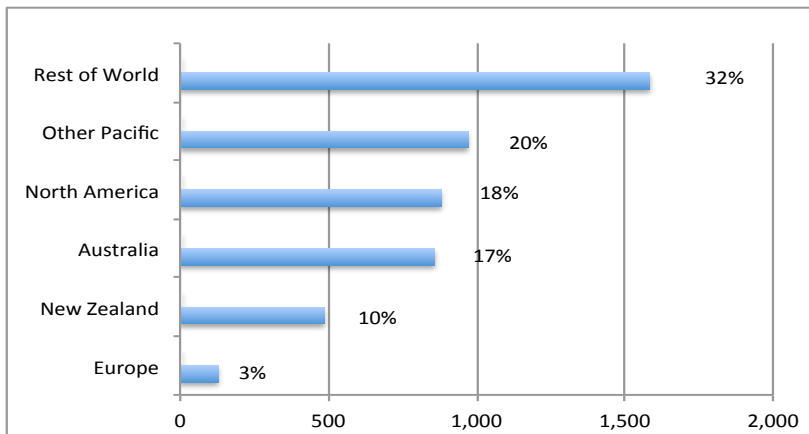
Cook Islands



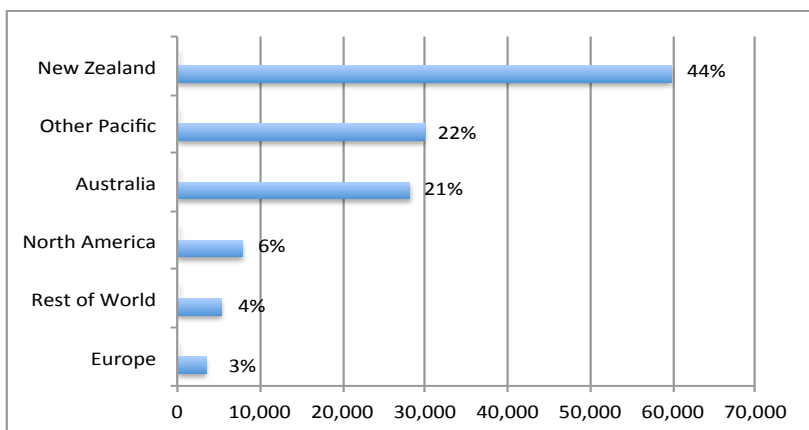
Fiji



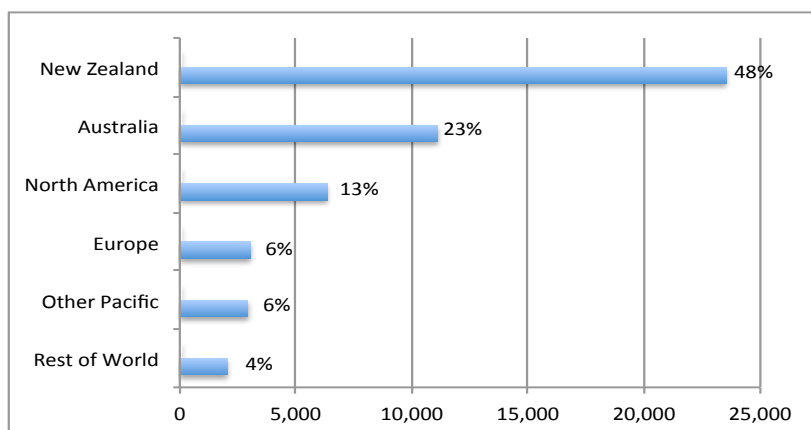
Kiribati



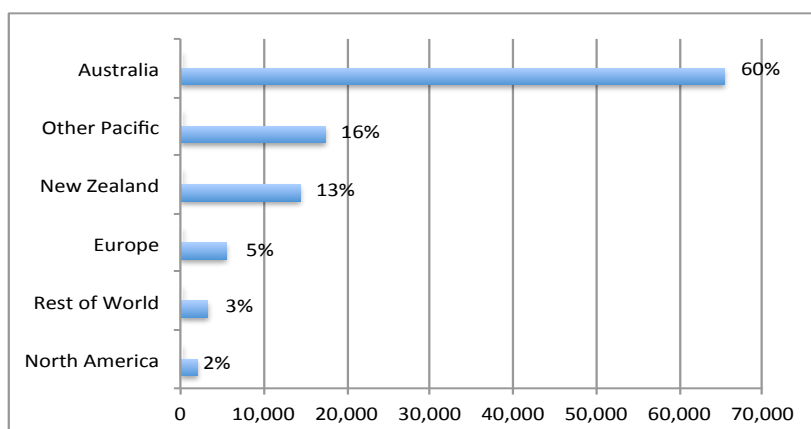
Samoa



Tonga



Vanuatu



2.4 Summary

- Holidaymakers account for 69% of all visits to the South Pacific, followed by visiting friends and relatives (14%).
- Fiji is the leading destination for international arrivals, particularly from North America (74%) and Australia (73%), followed by Europe (68%).
- After Fiji, tourists from New Zealand and Europe are most inclined to visit the Cook Islands (29% and 14% respectively) while Australians travel to Vanuatu (14%) and North Americans visit Samoa (9%).
- New Zealand tourists dominate the arrivals figures to the Cook Islands (67%), Tonga (48%) and Samoa (44%).
- Australians tend to travel to Vanuatu (60%), Fiji (51%) and Tonga (23%).
- As a destination that is more challenging to reach, Kiribati typically attracts visitors from the rest of the world (32%); just 27% are from Australia and New Zealand and 20% from the rest of the Pacific.

3. WHERE DO DIVERS COME FROM?

What's In This Section?

- Which markets are most important?
- How big is the market?
- Which markets go to the South Pacific?

3.1 Main Source Markets Worldwide

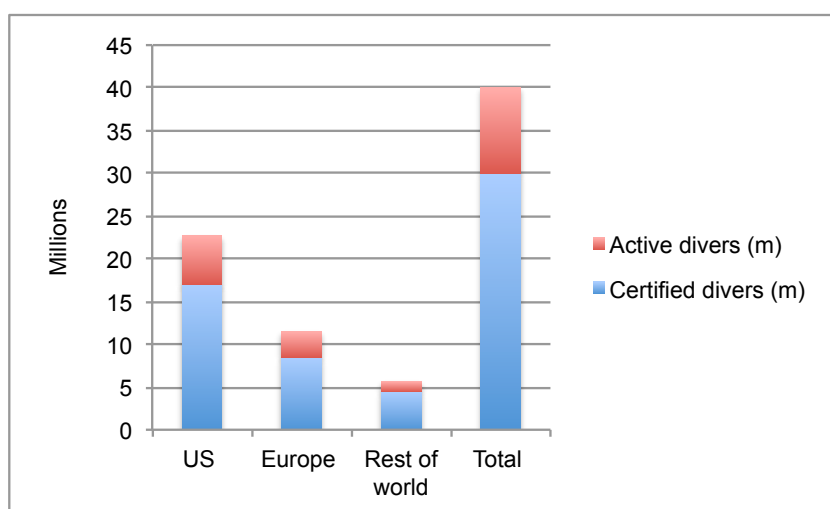
The US and Europe are the main source markets for divers worldwide, and the US is reputed to have twice as many divers as Europe. Italy is the most significant market in Europe, followed by Germany, France and the UK. Divers from the rest of the world, largely Australia, New Zealand and South Africa, account for 12% of the market¹.

3.2 Estimate of Global Market Size

Reliable and consistent data on the worldwide diving industry is sparse, although PADI does produce some statistical information.

By the end of 2012, PADI had issued more than 21.3 million dive certificates and, after growth fell in 2008 and 2009, the following three years recorded an average rise of 1.7% per year in certificated members. The 20 millionth certificate was issued to a diver in Micronesia in 2011.

Figure 4: Estimated Number of Certified and Active Divers, 2012
Source: Mintel, 2012



It is estimated that PADI-certified divers make up 70% of the total dive market and therefore in 2012 the total estimated number of certified divers worldwide is 30.4 million. Of these, roughly one third, or **10 million**, can be classified as 'active' divers.

¹ Sports Tourism Worldwide, Mintel, December 2012

The economic climate has taken its toll on the diving industry as a whole however, and expensive destination activities such as scuba diving have experienced declines in participation. In the US, participation is reported to have fallen by 8.9% between 2007 and 2009.

Despite the lack of growth, it remains an important industry with retail sales in 2010 in the US reported to have generated revenues of more than US\$330 million.

3.3 Markets to the South Pacific

North America

The mid-American state of Colorado has more registered divers per capita than any other state in the United States. Servicing this market is a large number of dive shops that organise tours for their clients, mostly booking for specialist dive wholesalers.

The Caribbean is a popular diving destination for divers on the East Coast of the United States. For divers living on the West Coast, the South Pacific, in particular Fiji and Micronesia, are more accessible. However the dive companies that organise holidays could be located anywhere across the country.

UK

In the UK in 2007/08 it is estimated that there were around 50,000 dive specific holidays from the UK, 80% of which were to the Red Sea. Approximately 5% were to the South Pacific i.e. around 2,500 people per year.



Australasia

Diving is a very niche market in Australia and New Zealand; it is small and has been declining in recent years.

The South Pacific accounts for around 70% of the international dive business out of Australia. However numbers are small and while there are no exact figures, specialist operators estimate the number people diving in the South Pacific each year from Australia is at most a few thousand, and from New Zealand is unlikely to exceed 1,000.

An indication of the size of the diving market in Australia is reflected in the number of visitors to the annual dive show, which attracts between 1,000 and 2,000 people. By contrast, there are two dive shows each year in the UK that each attracts 14,000 – 18,000 visitors.

However divers from Australian and New Zealander are important repeat visitors, taking multiple holidays in different destinations across the South Pacific.

The majority of divers are from East Coast Australia, where the majority of the population is located.

Japan

The number of Japanese divers who own certification cards is estimated to be around 1,550,000² of which around 650,000 dive regularly, up to 7 times a year,

The value of the diving guide and tour market is estimated at 36 billion yen (£US\$383 million) excluding the cost of transportation and accommodation. The breakdown of this figure is 28% (9.9 billion yen, US\$100.4 million) for dive school sales and 72% (26 billion yen, US\$263.8) for resort sales.

3.4 Summary

While there are a substantial number of certified divers worldwide, the number of people diving in the South Pacific is relatively small.

The numbers of people travelling from Europe, North American and Japan to dive in the South Pacific are low and although a high percentage of Australian and New Zealand divers visit the South Pacific, the dive markets in these countries are small.

- Global market: 10 million 'active' divers
- Biggest markets: USA, Italy, Germany, France, UK
- Low volumes to South Pacific

² Most recent data available is from 2008

4. WHAT DOES A DIVING HOLIDAY INVOLVE?

What's In This Section?

- *What types of holidays do divers book in the South Pacific?*
- *How long are dive trips?*
- *What types of accommodation do divers prefer?*
- *How much does a dive holiday in the South Pacific cost?*

4.1 Global

Dive holidays fall into two groups, liveaboards and land-based holidays.

Liveboard

Liveboard holidays offer divers the opportunity to live on board the boat they are diving from. Liveboard boats take up to 24 divers but some take smaller groups of 12-18 people.

This type of diving holiday appeals to more avid divers, offering access to remote dive sites and the opportunity to do four or five dives a day and may include night dives. However some divers are put off liveaboards as they are concerned that living on a boat for 7 days or more will be restrictive.

Liveaboards are popular with single people as the holidays are social and a good way to meet people.



Land-based

Land-based dive holidays are centred on resorts that have a dive centre or are located close to a dive centre. The accommodation needs to be good quality but most importantly divers are looking for accommodation that welcomes divers and offers good value for money.

Divers who chose land-based holidays are more likely to be recreational divers looking for additional activities or be travelling with partners or friends that don't dive.

These resorts would therefore be well placed to provide facilities and activities for non-diving partners, families and groups e.g. excursions, a variety of water sports or cultural outings and spa facilities.

4.2 Europe

Average Length of Holiday

A diving holiday in the South Pacific for a European holidaymaker will usually be around 2 weeks long, although it can range from 7 to 21 days, occasionally longer. Diving trips tend to be shorter, around one week, if they are added to a trip to Australia.

Visitors who have come to the South Pacific as part of a longer-term volunteering programme, and are taking their PADI course or Dive Master course, may stay up to six months.

Preferred Type of Accommodation

Divers will either stay on dedicated liveaboard boats or at mid-range land-based accommodation, with more expensive holidays using luxury resorts. Divers prefer to stay at dedicated dive resorts or at accommodation that is close (5-10 minutes walk) from small hotels or guesthouses.

Recreational divers who travel with non-diving partners, or family or friend groups, may use a wider range of accommodation. Honeymoon couples where only one person wants to dive are more likely to stay in luxury resorts.

Liveaboard boats provide an all-inclusive price for accommodation, meals, dives and diving equipment and can be good value. However the expectation of large tips (sometimes up to 10% of the total cost of the holiday) can make them less attractive.

Types of Transport Used

Not surprisingly most divers, particularly those using liveaboard, will travel within the South Pacific by boat. However land-based divers that are diving in more than one destination will usually travel between destinations by air due to the large distances involved and limited time available.

Average Cost of a Holiday

The cost of any holiday will depend largely on the length of stay and the type of accommodation used. However amongst the European tour operators contacted for this study the average cost of a dive holiday in the South Pacific ranged from £1,700 (US\$2,700) excluding airfares, to more than £5,000 (US\$8,000) with longer three week holidays costing more than £10,000 (US\$16,000) per person.

Italian tour operators offer dive holidays starting at the lower price range, while French, German and UK tour operators offered holidays averaging around from £3,000 to £4,000 (US\$4,800 to US\$6,400) excluding airfare. Equivalent holidays in South East Asian destinations are around £1,000 (US\$1,600) cheaper.

Within the South Pacific prices also vary considerably for example dive holidays in Palau are considered to be better value than those to French Polynesia.

Average:

- Length of holiday: 14 days
- Cost: from US\$3,000 ex airfares

4.3 North America

Holiday entitlement in the USA is only two weeks and therefore Americans tend to take shorter holidays than European holidaymakers. The average dive holiday to the South Pacific is 7-10 days and costs in the range of US\$2,500 to US\$3,000 excluding airfares. However, depending on the standard of accommodation this can be considerably higher.

Average:

- Length of holiday: 7-10 days
- Cost: US\$2,500 to US\$3,000 ex airfares

4.4 Australasia

In Australia and New Zealand dive holidays are primarily land-based, with liveaboards and high-end trips becoming popular in the past couple of years.

Land-based holidays are popular because divers are looking for more than purely diving from their holiday; they also want a cultural experience: visiting local villages, local shopping, exploring the islands.

The market has changed in the last 20 years, with divers now expecting better facilities, accommodation and activities for partners, friends or family members who are not diving.

However, divers do not need luxury accommodation as they are most comfortable in 3-star level accommodation that is clean, comfortable and good value. They spend most of their time in the water so there is no need for luxury.

A typical diving holiday in the South Pacific would be 7-9 days long, to fit in with work holidays, and would cost in the region of AU\$2,000 (US\$1,900) to AU\$4,000 (US\$3,800) including flights from a set departure point, e.g. Cairns.

Average:

- Length of holiday: 7-9 days
- Cost: from US\$2,000 including airfares

4.5 Summary

What does a diving holiday involve?

- Liveboard boats
- Land-based holidays
 - Staying in 'diver friendly' mid-range accommodation close to dive centres
- Average Duration: 7-10 days
- Average Cost: from US\$ 2,500 excluding airfares



5. WHO GOES DIVING?

What's In This Section?

- *Consumer profiles: age, gender, social background, behaviour*

5.1 Global Consumer Profile

Divers tend to be adventure-seeking young adults (aged 25-40), predominantly male, single, travel regularly and have considerable disposable incomes.

The split between male and female divers has remained broadly similar between 2006 and 2011, with one third female, two thirds male, and an average age of 29.

The diving community has three distinct categories:

- **Active Recreational** divers tend to dive in their home country, or locally
- **Leisure Divers** are occasional divers, typically diving when abroad on holiday
- **Hardcore Divers** are experienced active divers who go abroad, sometimes to remote locations, for the chief purpose of diving.

5.2 Europe

The Italian market is heavily skewed towards divers who take their holidays in a traditional family beach resort and make a small number of dives while they are there. Honeymoons are a strong market from Italy, so resorts that are suitable for honeymoon couples and offer diving are popular.

In the UK, around 25% of active divers take an overseas dive holiday annually. These people tend to consider that diving is the main purpose of their holiday. In addition, there are young British people that organize low-cost dive holidays, and those who consider diving to be a secondary purpose for their holiday who take one or more dives while on holiday in a beach resort.

The average expenditure by German diving tourists is considerably higher than that of UK divers, mainly because Germans tend to spend more on a higher quality of accommodation.

5.3 North America

In the US, 75% of divers are under 50. However, due to the cost of a holiday to the South Pacific, the age range for divers taking these holidays tends to be slightly older and ranges from 35 to 65 years old with some divers continuing into their 70's and early 80's.

Divers travel as single people, as couples or with groups of friends. Around 70% of American divers are men.

The majority of American divers (around 75%) are well-travelled professionals, in full-time employment, with average annual income being double the national average, at more than US\$100,000 per year.

However the demographic of divers can be broader than some other niche markets e.g. cultural heritage, because many divers are passionate about their sport and therefore 'divers will find the money to dive', sometimes saving for a couple of years to undertake a holiday in an iconic destination such as the South Pacific.

Profile:

- Aged 35+
- Professional
- Middle to high income earners
- Well-travelled
- More men than women
- Singles, couples, groups of friends

5.4 Australasia

As with Americans, Australian divers come from a wide demographic, as committed divers they will find the money to enjoy their sport.

However the majority (around 80%) are well educated, in professional jobs and have reasonable levels of disposable income. Divers are one of the most resilient types of travellers and are not easily put off by political instability in a destination.

The profile of Australian divers is similar to Americans:

- Aged 35+
- Professional
- Middle to high income earners
- Well-travelled
- More men than women
- Singles, couples, groups of friends

The 30 to 40 year age group segment diving in the South Pacific is predominant, with a growing number of older over 50 year olds who value travel and have more disposable income than younger age groups.

New Zealand divers take regular diving trips to the South Pacific; most go once a year, some go three times a year. More exotic trips are growing in popularity, for example, one specialist operator reported that trips to the Galapagos for NZ\$11,000 (US\$9,000) have sold very well.

Wrecks Appeal to Men

Wreck diving appeals more to men than women, and dive groups to Truk Lagoon can consist of up to 80% men. Whereas diving in Palau appeals more to women, and groups will be more even with 60% men or equal numbers of men and women.

Groups

Divers frequently travel in small groups of 8 to 16 people, booked through local dive clubs and shops. These divers feel they will be diving with friends or like-minded people and are more likely to know their 'buddy'.

5.5 Japan

In Japan, over the last ten years, there has been considerable growth in women divers and the proportion of female divers is now almost the same as male divers.

The age groups most likely to become certified divers are men and women in their 20s, followed by people in their 30s. However an increasing number of older Japanese people are also becoming certified divers and this is considered to be a potential growth market.

5.6 Potential Growth Markets

Budget travellers and families continue to be important in the dive travel market, particularly in light of spontaneous decisions to 'give diving a go' while on holiday, which might in turn spark a life-long interest in the sport.

Singles market offers potential, as diving always requires a 'buddy', which is a good way of meeting new people.

The growing market of 50+ year-olds offers significant potential owing to their active lifestyles.

Equipment rental: diving is a lucrative commercial activity for operators; only a select few divers can afford their own equipment and therefore most divers rely on commercial dive shops to rent all the gear. Even if consumers do own all their own equipment, they still need to fill their tanks.

5.7 Summary

Who goes on diving holidays to the South Pacific?

- Average age: 35 to 65
- Men 66%, Women 33%
- Single, couples or groups of friends
- Adventure seeking
- Travel regularly
- Disposable income

6. WHAT'S SPECIAL ABOUT DIVING IN THE SOUTH PACIFIC?

What's In This Section?

- *Why is diving in the South Pacific unique and special?*
- *Why do divers choose the South Pacific?*

6.1 Global

The Unique Selling Point (USP) for diving in the South Pacific is the quality of the marine environment with its unspoilt, rich and different underwater fauna and flora offering a wonderful reef, wrecks and an extensive variety of secluded diving sites.

6.2 Europe

Due to the time it takes to travel to the South Pacific from Europe, the exceptional quality of the diving is essential. As one dive specialist said: "it has to be exceptional to travel that far."

The top 5 most popular destinations are:

- Fiji
- French Polynesia
- FSM
- Palau
- PNG

6.3 North America

For divers from North America it is 'quality and variety' of the ocean and marine environment that sells the South Pacific as a unique diving destination.

North Americans will start by diving in Fiji and then explore more locations. Their top 5 most popular destinations are the same as for Europeans.

"Some of the best diving in the world – the combination of natural environment, lack of pollution, huge areas of water and no people.

People live off the sea and RESPECT and look after it.

It is an iconic place to dive: French Polynesia, Micronesia, PNG, Solomon Islands are on divers wish lists".

UK Dive Specialist

6.4 Australasia

Close to Home

For Australia and New Zealand, in contrast to Europe, the USP for the South Pacific is that it is "close to home and good value for money".

Fiji

The most popular destination for dive specialists organising tours is Fiji which accounts for 80% of market and offers excellent diving and is good value. The countries that are considered more exotic and hard to reach are the Solomon Islands, PNG and Micronesia.

Tonga and Solomon Islands

Tonga is considered to be the top dive destination from New Zealand but at the time of writing this report, air access to some of the best dive sites was problematic for safety reasons and was severely restricting the potential to develop these sites.

Diving in the Solomon Islands is considered excellent.

6.5 Japan

Fiji, French Polynesia and New Caledonia are perennial favourites for the Japanese market and will continue to grow not only for diving tourism but also for honeymoon tourism.

6.6 Summary

Diving is “the best in the world”

- Quality of marine life
- Variety of dive sites
- Unpolluted
- Untouched by civilisation

Top Four Destinations:

- Fiji – soft corals, Astrolabe reef
- Palau – wrecks, walls, sharks
- FSM- wrecks
- PNG – pristine dive sites, wrecks, diverse marine life

+ French Polynesia – but expensive

Potential for Development:

- Solomon Islands – excellent diving and wrecks, but hard to get to
- Tonga – excellent but current flight issues
- Vanuatu – wrecks – limited number of dive operators

For Europeans: A trophy destination

For Americans: Start with Fiji, then explore outer islands

For Australia and New Zealand: Good value, close to home

For Japanese: favourite destination Fiji, French Polynesia, New Caledonia

7. RESEARCHING AND BOOKING DIVE HOLIDAYS

What's In This Section?

- *How do divers research, plan and book their holidays?*
- *Sources of information for choosing a diving destination*
- *Booking lead times*

7.1 Global

The main sources of information for all markets are:

- Personal recommendations – from friends and trade specialists
- Internet searches
- Specialist Dive magazines
- Consumer shows

7.2 Europe

Specialist Knowledge

Personal recommendations are important for divers, who research their holidays very thoroughly using the Internet, specialist dive magazines and consumer shows such as the annual dive shows in Birmingham, London and Paris (see Section 12).

To be able to add value for their clients, the specialist operators need personal experience of the dive sites they are selling because divers are usually very well informed before they contact the specialist dive operators and know exactly what they want.



Booking Lead Time

In Europe divers start researching their holidays two years ahead of their planned holiday and tend to book about a year head. However for liveaboards, booking time are longer as the boats get booked up in advance and they are inflexible about cancellations, which can be problematic as flights can only be booked 11 months in advance.

Despite the generally long lead times for diving holidays, the trend as with other types of holidays, is towards shorter lead times.

“Tour operator advice is critical, especially for tailor made trips”

7.3 North America

Internet searches

Internet searches are the main method of finding a specialist dive wholesalers/tour operators to book a diving holiday.

Dive wholesalers/tour operators

Dive wholesalers specialise in selling dive holidays. Their specialist knowledge of dive sites, liveaboards, and dive resorts is very influential in helping the holidaymaker to decide where they want to dive. Dive wholesalers who have visited a dive site and resort are far more passionate about it than one they haven't visited and can ensure it fits their client's requirements.

Dive shops

Divers can book their holidays through their local dive shops. These shops offer advice on diving holidays as well as promoting and organising diving tours (of around 15-30 people) for their customers. Some of the bigger dive shops may send out a tour each month to a wide range of destinations.

Consumer Shows

Consumer dive shows are important for influencing the choice of destination. They take place across America but the three largest and most influential are:

- Our World Underwater, Chicago, February
- Beneath the Sea, New Jersey, March
- Scuba Show, Long Beach California, June

7.4 Australasia

Personal Recommendations

Personal recommendations are the most important source of information for divers trying to decide on a destination for their holiday. These recommendations come from personal friends and other divers but very importantly they also come from dive shops, clubs and the

specialist dive operators who are very knowledgeable about the range of destinations available and can suggest the destination that will best suit their clients' needs.

Dive Clubs

The specialist dive operators in Australia get the large majority of their booking, about 85%, through dive clubs.

Dive Magazines

Specialist dive magazines (see Section 12) are influential in the choice of destination for a diving holiday.

Independent Bookings

New Zealanders are big independent travellers and are increasingly booking dive holidays through the Internet to the more accessible destinations including Fiji, Vanuatu and the Great Barrier Reef.

Australians are also increasingly booking their diving holidays to Fiji and Vanuatu directly with local dive centres.

7.5 Japan

Personal recommendations and the Internet are important for deciding on a destination for a dive holiday. The Internet is most important for deciding the type of accommodation and trip details, along with personal recommendations and guidebooks.

Lead times for booking dive holidays from Japan are shorter than from Europe and tend to be between 3-6 months, or less.

Japanese divers who are confident travellers and have a good knowledge of their destination may book direct with local dive centres via the Internet.

7.6 Summary

Research:

- Personal recommendations
- Internet
- Trade recommendations: dive shops and specialist tour operators
- Consumer shows

Book using:

- Specialist dive operators
- Dive shops
- Direct with dive resorts via internet

Booking lead times:

- From Europe and North America:
 - Research: 2 years ahead
 - Book: 1+ years ahead, longer for liveaboards
- From Australia, New Zealand and Japan:
 - 3-6 months

8. COMPETING DESTINATIONS

What's In This Section?

- *Which destinations are the South Pacific's main competitors and why?*

8.1 Global

The Caribbean, Mediterranean and Thailand are well-established diving destinations along with dive sites in the USA such as Florida, California and Hawaii.

Other popular locations include Australia (Great Barrier Reef), the Red Sea (Sharm El Sheikh), the Indian Ocean (Maldives and the Seychelles) and southern Africa (South Africa and Mozambique).

8.2 Europe

Regionally the South Pacific is competing against South East Asia for the European dive market.

Indonesia and the Philippines are increasingly popular. The diving is considered to be excellent and they are popular destinations for regular divers as airfares are cheaper and more accessible with less travel time required.

However for divers looking for 'one-off' or 'trophy destinations' the Galapagos Islands are considered by many operators to be a competing destination to the South Pacific.

For shorter, cheaper holidays, and for first time divers, the Red Sea is a popular destination from Europe.

8.3 North America

Asia is the main regional competitor to the South Pacific for North Americans. The countries offering excellent diving, good quality accommodation, good service and which are more accessible are:

- The Philippines – which is growing rapidly in popularity
- Indonesia – offering a wide range of sites and resorts
- Malaysia

Australia is also popular although the current exchange rate makes it expensive.

The Caribbean is a popular destination for American divers from the East Coast. However it is considered to be a budget destination that doesn't offer the wealth of marine life that is found in the South Pacific.

8.4 Australasia

Australia has its own excellent diving destination with the Great Barrier Reef. For divers travelling independently and booking direct, this is the main competitor to the South Pacific.

For divers from Australia who want to travel abroad, Asia is the main competitor to the South Pacific.

The Philippines is a growing market. The marine environment is well looked after; the diving is very good and it offers the rare opportunity to dive with whale sharks. It is generally considered to be good value and has good air access from Australia and New Zealand.

Other popular destinations in Asia are Malaysia and Indonesia for high-end holidays. Further afield the Maldives is popular for liveaboard trips and the Galapagos for high-end holidays.

8.5 Japan

For Japanese divers the main competing destinations are:

- Asia (Philippines, Indonesia, Thailand and Malaysia)
- Australia and New Zealand
- Northern Mariana Islands
- Maldives
- Mexico

The Philippines, Saipan and Guam are popular destinations for Japanese divers, as flights to these destinations are not too far away or too expensive.

8.6 Summary

Regional competition:

- Philippines – rapidly growing in popularity, high quality diving, whale sharks, good value, easily accessible
- Indonesia – wide range of sites and resorts
- Malaysia – easily accessible, good value
- Maldives – good for liveaboards
- Australia – expensive due to exchange rate; mostly direct bookings
- Guam – popular with Japanese

Global competition:

- Galapagos – trophy destination
- Caribbean – popular from East Coast USA
- Red Sea – popular from Europe

9. WHAT STOPS MORE PEOPLE DIVING IN THE SOUTH PACIFIC?

What's In This Section?

- *Why don't more divers holiday in the South Pacific?*
- *What prevents tour operators selling more diving holidays?*

9.1 Poor Accessibility Restricts Growth

Poor Reliability of National Carriers

The cost and reliability of local air travel between South Pacific countries is a major barrier to expanding the range of dive destinations that are used by European tour operators.

Operators from Europe, North America, Australia and New Zealand all commented that the availability and reliability of local flights and the regular changes in flights schedules make forward planning very difficult.

Regional air schedules can be inconvenient, unreliable and expensive making the region unattractive to work with for dive operators, who rely heavily on customer satisfaction to generate repeat business and referrals.

"Dive operators are doing a great job, they are let down by national carriers"
American Dive Operator

Examples: Papua New Guinea, Tonga, Marshall Islands

Papua New Guinea is considered to be "an awesome destination" with good resorts. However the tourism infrastructure is not good and American dive operators report finding Air Niugini to be unreliable and difficult to work with, consequently they prefer to use other destinations.

Tonga is considered to be the top dive destination from New Zealand but at the time of writing this report air access to some of the best dive sites was problematic for safety reasons and was severely restricting the potential to develop these sites.

Operators find the Marshall Islands are too hard to get to and therefore don't try to sell it.

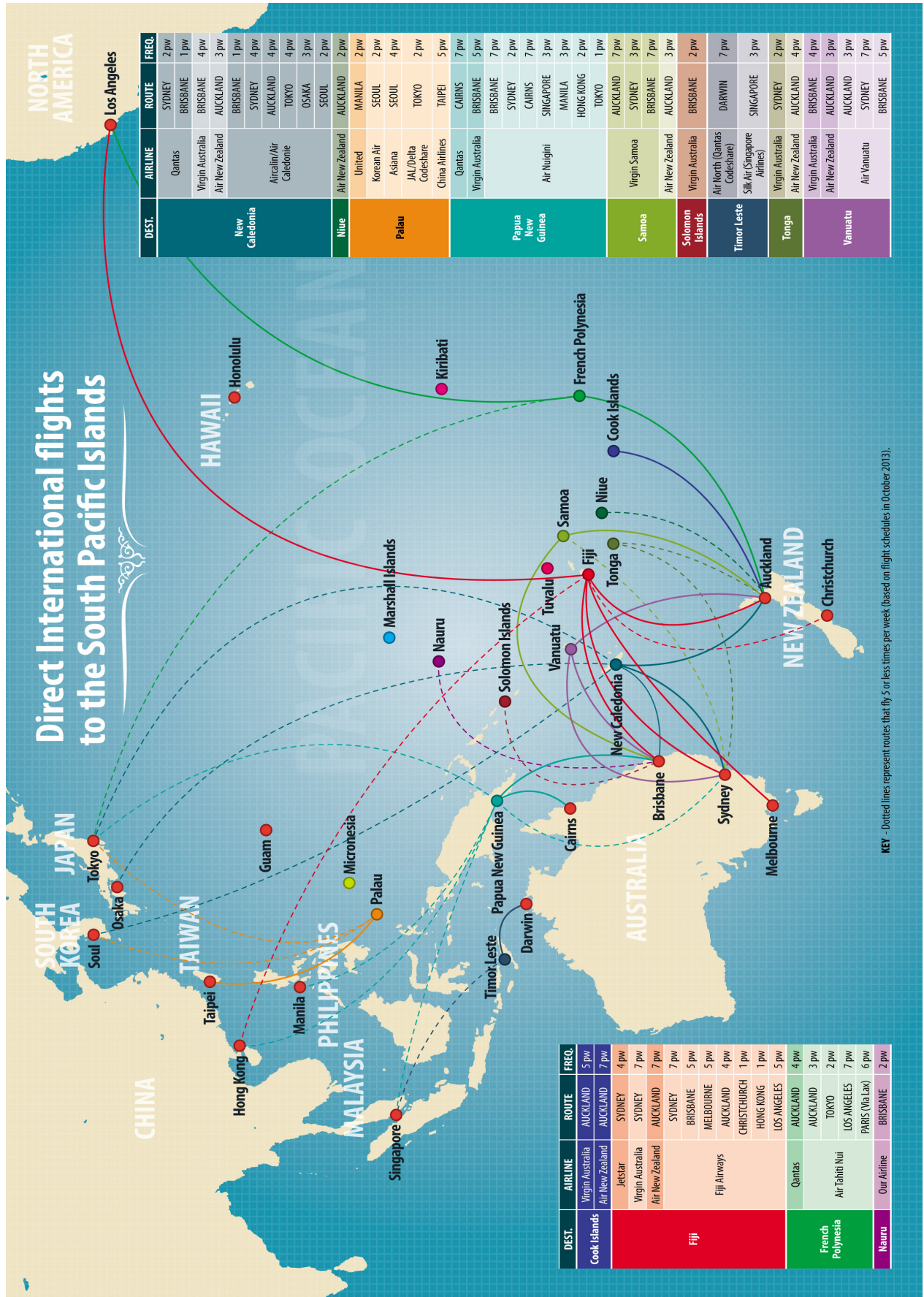
Excess Baggage

The additional costs charged by airlines for overweight luggage can push up airfare costs, which are already high compared to competing destinations in South East Asia.

New Routes Can Open Up New Destinations

The map overleaf illustrates the limited number of regular international flights to SPTO member countries apart from Fiji and Vanuatu.

New routes or special offers such as Korean Air and China Air's current offer of cheap fares to Palau via Seoul and Taipei can open up a destination.



Attractive Gateways

When visitors have to wait for several hours, or even overnight, at a gateway for connecting flights, the gateway needs to appeal to holidaymakers and offer something of interest to visitors. Guam, for example, is not of interest to UK divers and therefore not a good place to stopover.

9.2 Consumer and Trade Awareness

Fiji, Palau and Micronesia are well known as excellent dive destinations. However consumer awareness of dive sites in some of the other countries is relatively low and therefore there is little demand for wholesalers to create tours to these destinations.

For example Tahiti is primarily perceived as a beach destination and its diving offer is not well known.

“Italians see the South Pacific under only one name, Polynesia; for them that means white beaches and overwater bungalows. We are ALWAYS LOOKING TO CHANGE THIS image but is hard. This impression is very strong in the Italian market because most visitors are honeymooners and most of the travel brochures just show beaches and resorts”.

Italian Dive and Honeymoon Tour Operator

Better Fishing than Diving

Not many diving holidays are sold to the Cook Island, Kiribati or Samoa. These destinations are good for fishing rather than diving.

9.3 Limited Facilities

The Solomon Islands are reasonable easy to reach from the West Coast and offer great opportunities for divers especially when combined with wreck diving in Vanuatu. However there are only a handful of dive operators in Vanuatu and awareness of the diving opportunities there is low.

9.4 Cost

French Polynesia, in particular Tahiti, and New Caledonia are perceived to be expensive as everything is brought in from France.

9.5 Direct Bookings

Competition with direct bookings via the Internet is changing the market. Traditional destinations such as Fiji and Vanuatu are now easy to book independently and clients booking with a tour operator are looking for more exotic destinations.

Although most local dive centres are good at communicating, some have a slow response time which is off-putting to tour operators and people booking directly.

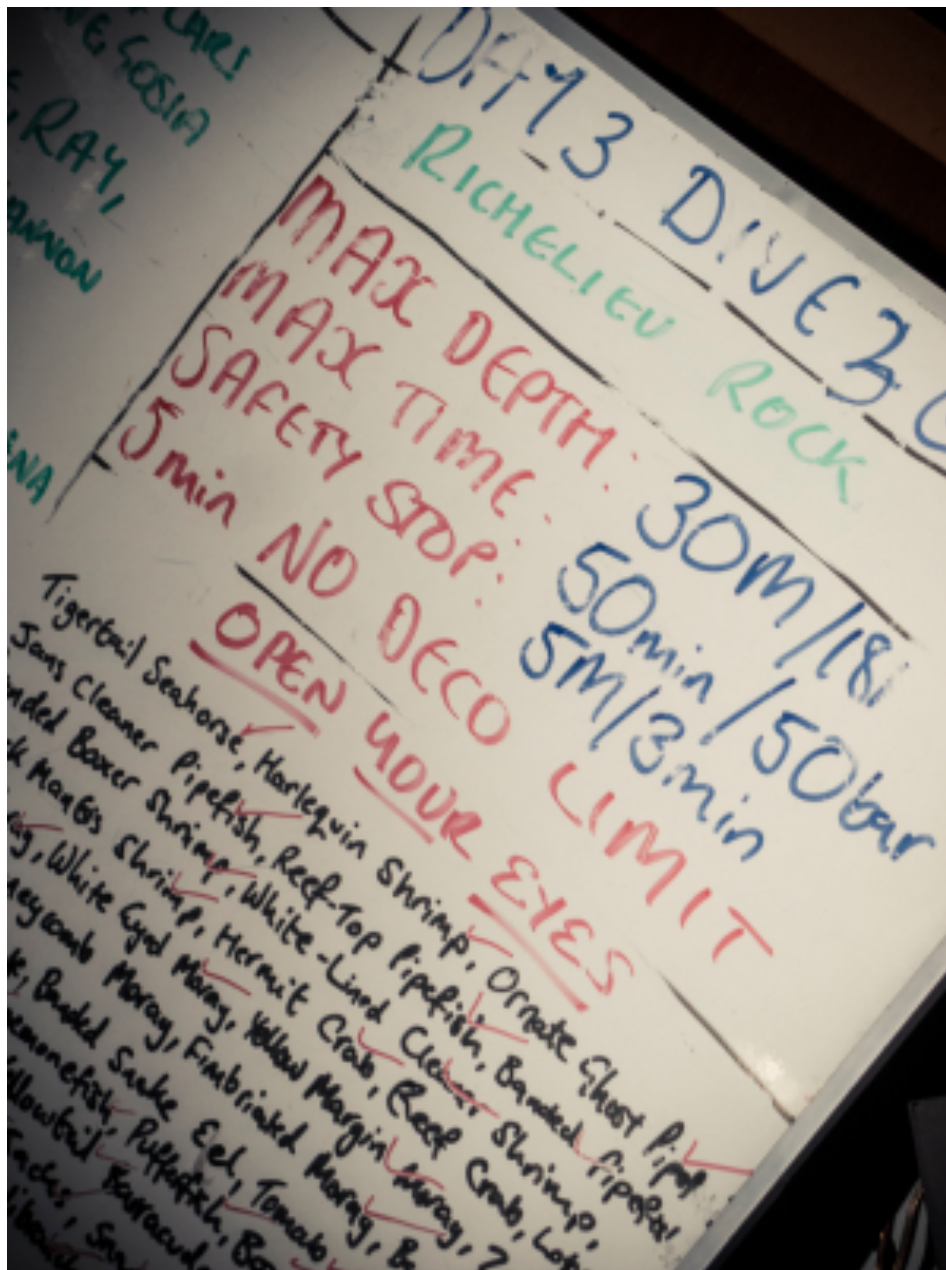
9.6 Small Market

The diving market to the South Pacific is small. For most tour operators in Europe and North America, the South Pacific is unlikely to account for more than 5% of their business.

In Australia and New Zealand, where about 70% of international dive trips are to the South Pacific, the total dive markets are small and numbers to the South Pacific are unlikely to be more than a couple of thousand people.

9.7 Summary

- Regional air schedules – inconvenient, unreliable, hard to work with
- Low awareness of dive opportunities beyond Fiji, FSM, Palau
- Small niche market



10. HOW CAN THE DIVE PRODUCT BE IMPROVED?

What's In This Section?

- *Recommendations for improving and expanding the dive product*

10.1 Key Factors for Development

The key factors that determine the development of a new dive destination are:

- Excellent diving: something unique e.g. underwater terrain, wrecks, sharks, manta rays, hammerhead whales
- Good diver operators: who understand the levels of customer service required from the source markets
- Good access: reliable flight schedules
- Other activities to complement diving.

10.2 Identify and Promote Good Dive Destinations

Countries interested in developing their diving product should research where the best dive sites are, what they offer and then consider the type of divers they might attract e.g.

- Single men keen on World War II wrecks
- Groups of friends wanting to dive recreationally and enjoy other water and land based activities
- Couples wanting to tick off items from their 'bucket list' such as swimming with sharks or hammerhead whales

Provide the trade and consumers with detailed up-to-date information on the diving locations and what is special about each one.

This information could be provided on national and regional tourist board websites with an agent login to provide additional information on dive sites, suppliers, and operators. Ideally this would not be funded by advertising so it can include all the relevant businesses and not just those that are members or pay for advertising.

The website should include the direct e-mail address of a well-informed contact at the tourist board for tour operators who need further information.

10.3 Good Dive Operators

The dive operators are generally considered to be doing a very good job. In some cases, and particularly if new destinations are opened up, there is a need to improve responsiveness to emails and other communications.

10.4 Regional Air Access

To enable visitors to reach their dive destinations easily, regional air lines need to improve reliability, offer value for money and high standards of customer care.

Regional flight schedules could be made more easily accessible and wholesalers trained to ensure they are well informed about regional flight networks and schedules.

Destinations interested in expanding their dive markets could work with airlines to promote routes and offer deals that will appeal to divers and specialist dive tour operators for example, not charging for additional luggage. Divers, and particularly underwater photographers, need to carry large amounts of equipment and the additional cost of paying for excess baggage can be off putting.

10.5 Diversify into Complementary Activities

The dive market is small and therefore additional activities are needed to expand the market and attract a mix of visitors that are not all primarily motivated by diving.

Snorkelling

There is scope to fully research the snorkelling market, which goes hand in hand with diving but is potentially much larger.

Research should identify the best snorkelling sites and what they each have to offer in terms of the quality of the snorkelling, the adjacent accommodation, accessibility, which market segments they would be best suited to e.g., non-diving partners, families, older people.

Underwater Photography

Underwater photography is a very niche but high spend market. Many divers are keen to photograph what they see and offering services to enable divers to take underwater photographs can add value and generate ancillary revenue.



10.6 Diving as a Driver for Responsible Tourism

Diving has the potential to drive the development of tourism in the South Pacific countries with a good diving product. Although it is a small market, diving tourism can be effective in stimulating responsible tourism in new destinations. Small lodges offering authentic, local accommodation for 20-30 people will appeal to the dive market.

In addition, marine conservation is close to the hearts of divers, who search out the world's unpolluted waters.

Divers want to get away from people and crowds and are looking for something different, an experience that's off the beaten track. Unspoilt destinations where other tourists don't go are highly prized.

Although the primary motivation of divers is to dive and not for cultural heritage, they are a segment of visitors that will leave their destination with a far greater knowledge of its culture and history than most other holidaymakers. The level of interaction with local people is usually very high compared to other types of holidays, and the history and stories behind wreck diving in particular provides a level of insight into local life and history that far exceeds that of other holidaymakers.

10.7 Summary

"Dive operators are doing a great job!"

- Low awareness of dive opportunities beyond Fiji, FSM, Palau
 - Differentiate: Identify which islands are good for which type of diving and promote them e.g. wrecks, wall, whales, manta rays, jellyfish
 - Build customer awareness of diving opportunities at other destinations
- Regional air schedules – inconvenient, unreliable, hard to work with
 - Improve reliability, value for money and customer care
 - Make regional flight schedules easily accessible
- Small niche market
 - Develop other activities to complement diving

Benefits of Dive Tourism:

- Promotes marine conservation
- Uses local accommodation
- Enhances knowledge of natural and cultural heritage, through historic wreck diving, interaction with local people

Recommendation:

- Use dive tourism to drive responsible tourism in destinations where there's a good dive offer
- Research and develop snorkelling tourism to broaden audience

11. RECOMMENDATIONS FOR MARKETING DIVING HOLIDAYS

What's In This Section?

- *Marketing Recommendations*
- *Key pointers for successful marketing dive tourism*

11.1 Fragmented Market

The diving market is extremely fragmented and, as with other niche markets, diving holidays are not advertised widely in the general media. Dive operators target media known to have a high level of diver readership, or viewers, as well as promoting through diving clubs. This includes specialist dive publications and social media channels (see Section 12).

11.2 Identify Key Characteristics of Dive Destinations

Promotion of specific destinations and their dive sites within the South Pacific needs a clear focus. Marketing campaigns should identify which islands are good for which type of diving e.g. wrecks, reef diving, and shark diving.



11.3 Specialist Knowledge Sells

The role of tour operators and individual sales agents is key element in selling diving holidays to the South Pacific; enthusiasm and detailed first-hand knowledge of a destination are what clients want from specialist operators.

Product knowledge amongst a sales team is essential to enable them to enthuse about a dive site and sell it to the right customer.

Establishing 'fam trips' for the lesser-known destinations would be very worthwhile.

11.4 Example: Fiji Dive Fiesta

Fiji is considered by wholesalers in North America to have done "a great job" of raising awareness in America about the country. The Fiji Dive Fiesta is considered to be "awesome" and very valuable in developing product awareness amongst the trade. More events of this nature, run by other countries, would be very well received.

11.5 Co-op Marketing

A good relationship between the trade and NTO's to provide marketing support is considered essential to driving sales. On the whole the specialist dive operators consider the NTO's to be doing an effective job within the limitations of their budgets. Where possible the trade welcomes on going trade partnerships with a 'Call to Action' for local tour operators. This drives many more booking than references to a website.

11.6 Summary

Fragmented market

- Target dive magazine, dive clubs, social media used by divers

"Specialist knowledge is the best way to sell"

- Broaden product knowledge:
- Provide international operators with good quality dive information
- Provide well-informed contact at regional or national tourist board
- Fam trips to lesser-known destinations
- Run more events like the 'Fiji Dive Fiesta' – "its excellent"
- Co-op marketing with tour operators; a Call to Action drives bookings

12. PROMOTIONAL CHANNELS

What's In This Section?

- *Key methods of distribution such as internet and direct sales*
- *Specialised media for marketing and promotion*
- *Traditional and electronic media; through which consumers can be reached for promotional purposes.*

12.1 Global

Dive Listings

Dive Spots www.divespots.com

Scuba diving sites and GPS destinations

Wanna Dive www.wannadive.net

World dive site atlas

Asia Dive Site www.asiadivesite.com Asian scuba dive site and dive map guide

Dilogs www.dilogs.com

Scuba Board www.scubaboard.com

Social Networks

Dive Buddy www.divebuddy.com

Fish 4 Divers www.fish4divers.com

12.2 Europe

Organisations

CMAS www.cmas.org

Founded in 1959 and comprises 130 federations from five continents. Organises underwater sports events and is at the forefront of technical and scientific research and development.

United Kingdom

Publications

Dive Magazine (UK) www.divemagazine.co.uk

Divernet www.divernet.com

Scuba Magazine www.scubamagazine.co.uk

Newly launched, Scuba is the official magazine of the UK's biggest diving club, BSAC.

Sport Diver Awards 2013 www.sportdiver.co.uk

Reader nomination awards by text or email in several categories including Best Tour Operator, Best Liveboard and Best Overseas Dive Centre.

Consumer Shows

Paris International Dive Show, January

Paris International Dive Show, January

LIDS 2014 London International Dive Show, February, ExCel, London

DIVE 2014 October, NEC Birmingham

Diving Clubs and Associations

BSAC www.bsac.com

The UK's leading dive club and the sport's national governing body providing internationally recognised diver training and development programme.

Sub-Aqua Association (SAA) www.saa.org.uk

Association of independent dive clubs in the UK.

12.3 North America

Publications

Alert Diver www.alertdiver.com

Dive Training Magazine www.dtmag.com

Diver Magazine www.divermag.com

Scuba Diving Magazine www.scubadiving.com

Sport Diver – Official Publication of PADI (US) www.sportdiver.com

Undercurrent www.current.org

Trade and Consumer

DEMA Show 2013: 6-19 November 2013, Orlando, Florida, US

DEMA Show 2014: 19-22 November 2014, Las Vegas, US

www.demashow.com

DEMA (Diving Equipment and Marketing Association) www.dema.org has outlined its mission to promote sustainable growth in safe recreational diving while protecting the underwater environment. It organises the annual DEMA Show, which attracts around 2,000 vendors, and operates a number of marketing initiatives to generate new customers, drive the retail business, and promote diver retention.

There is a wide range of consumer dive shows across America, the best-known are:

Our World Underwater: 14-16 February 2014, Illinois, US www.ourworldunderwater.com

Beneath the Sea: 28-30 March 2014, New Jersey, US www.beneaththesea.org

Scuba Show: 7-8 June 2014, California, US www.scubashow.com

Social Media

Dive Newswire www.divenewswire.com

Online newsletter once a week

Facebook www.facebook.com

Facebook has a big presence in the diving community.

Scubaboard www.scubaboard.com

Online scuba diving forum community of 250,000 divers

12.5 Australasia

Word of mouth recommendations are key for divers and they will take personal endorsements from fellow divers and dive shops. Specialist dive operators will market to the dive shops rather than to the public.

Publications

Sport Diving www.sportdiving.com.au

Dive Log www.diveog.net.au

Dive New Zealand www.divenewzealand.com

Dive The Blue www.divetheblue.net

Social Networking

Dive-Oz www.diveoz.com.au

Australia's biggest and most updated Australian resource on the Internet primarily promoted diving in Australia but featuring plenty of links to international destinations and features an online discussion forum.

Consumer and Trade Shows

Australia Dive Expo: 22-23 February 2014, Sydney

www.australiadiveexpo.com

OZTek: 14-15 March 2015, Sydney

www.diveoztek.com.au

Organised every 12-18 months and attracts around 1,000 to 2,000 visitors.

12.6 Japan

Several South Pacific countries have been very proactive in joining with partners to promote themselves in Japan. For example:

New Caledonia tourism board has partnered with Aircalin (SB). Their campaign has used the Internet extensively and includes:

- Promotional videos on a video site called "WebTV"
- Blogs
- A café featuring New Caledonia for a limited time in Daikanyama, Tokyo. www.travelvision.jp/news/detail.php?id=48084
- Offering a low-cost tourism holiday.

Tahiti Tourist Board and Air Tahiti Nui (TN) had a joint campaign that:

- Focused on women, advertising in women-only train carriages
- 5-minute television programmes run 13 times on national television (TV asahi)
- Facebook page
- Collaboration with famous photographer Kazuyoshi Miyoshi

Fiji Tourist Board and Fiji Airways (FJ) have:

- Deployed viral marketing using a blog and listing advertisements

- Promoted a low-cost holiday

Overall, most of the South Pacific countries use the Internet extensively as one of their branding and promotional tools and have developed good partnerships to support their promotional activities.

Trade and Consumer Shows

There are a number of Asian dive shows for both the consumer and the trade. The leading ones are as follows:

Diving Resort Travel Expo www.divingandresorttravelexpo.com

13-15 December 2013, Hong Kong

28-30 March 2014, Shanghai, China

20-22 June 2014, Okinawa, Japan

Dive China: 1-3 March 2014, Guangzhou, China

www.chinadiveshow.com

Malaysia International Dive Expo: 6-8 June 2014, Kuala Lumpur, Malaysia

www.mide.com.my

2014 is the eight year for this consumer and trade exhibition event, promoting Malaysia as a leading dive destination.



13. OUTBOUND OPERATORS

What's In This Section?

- *A list of key outbound operators that currently specialise in the niche market*

13.1 Europe

France

AMV Voyages www.amv-voyages.fr

Part of the AMV Travel Group; diving offered in Micronesia.

A number of diving specialist companies offer packages to the South Pacific:

Ultramarina www.ultramarina.com

Oceanes www.oceanes.com

Key Largo www.keylargo.to

Germany

There are a number of German diving operators, offering a specialised diving holiday service:

Dorothees flug-service www.suedsee-traumurlaub.de

Pacific Travel House www.pacific-travel-house.com

Dive Now www.dive-now.de

Sub Aqua Tachreisen www.sub-aqua.de

Dive Delta www.divedelta.de

Italy

Diving holidays from Italy are either booked through general tour operators or specialist dive companies.

Pan Pacific Tours www.panpacific.it, Turismo www.turismo.it, Go Australia www.goaustralia.it and Go Go Travel www.gogotravel.eu all offer diving tours in the South Pacific.

Specialist operators include:

Dive Promo World www.promo-world.it

Dive and Cruise www.dive-and-cruise.it

Mastrosommerso www.mastrosommerso.it

Sweden

Swedish dive holidays are either through specialist organisations or general tour companies.

Scuba Travel www.scubatravel.se

P&H Travel and Dive www.phtravel.se

Albatros Travel www.albatros-travel.se

South Sea Travel www.soderhavsresor.se

Kilroy Travel www.travels-kilroy.se

United Kingdom

Dive Quest www.divequest-travel.com

Flexible dive packages, especially for groups and families. Include photographic and diving courses.

Dive Worldwide www.diveworldwide.com

Dive Worldwide is a specialist tour operator promoting diving holidays throughout the world, including liveaboard, dive resorts and dive centres. The South Pacific is one of the key destinations in its portfolio, and the company offers trips to Fiji, Micronesia, Papua New Guinea, the Solomon Islands, Tonga and Vanuatu.

Original Travel www.originaltravel.co.uk

Luxury operator which operates an entire division, Original Diving, which is dedicated to luxury diving. Destinations include PNG, Fiji, French Polynesia, Palau and Micronesia.

Planet Dive Holidays www.planetdiveholidays.co.uk

Dedicated dive operator with a focus on the 'best dive areas in the world', including Palau and Micronesia.

Regal Dive www.regal-diving.co.uk

A large UK operator that offers a range of resort-based and liveaboard diving holidays, but does not currently travel to the South Pacific.

Scuba Travel www.scubatravel.com

One of the largest dive holiday companies in the UK, travelling all over the world. Operates liveaboard holidays in the South Pacific, chiefly in PNG and Fiji.

Ultimate Dive Company www.ultimatediving.co.uk

Worldwide diving company, including Fiji and Micronesia.

Worldwide Dive & Sail www.sirenfleet.com

Leading operator in luxury liveaboards; destinations include Palau, Fiji (new for 2013) and Micronesia (new for 2014).

13.2 North America

Caradonna Worldwide Dive Adventures www.caradonna.com

Established in 1985, Caradonna Worldwide Dive Adventures is one of the leading US operators in the dive and adventure travel market, and in 2004 was acquired by First Choice Holidays, now part of the TUI group of travel companies. Based in Florida, the company manages a huge network of accommodation providers, upwards of 300 hotels at more than 37 worldwide destinations, enabling its customers to enjoy competitive rates. Its key destinations include the Caribbean, Central America, Mexico and the Pacific.

PADI Americas www.padi.com

The world's leading scuba diving training organisation, PADI also operates diving trips and holidays to various destinations including Fiji.

Poseidon Dive Adventures www.poseidondiveadventures.com
Liveaboard and resort-based dive holidays. Company pioneering dive tourism to Micronesia 30 years ago.

South Seas Adventures www.south-seas-adventures.com
South Pacific specialists, particularly weddings and honeymoons, and offers diving holidays, including liveaboard and wreck diving. Destinations include Fiji, French Polynesia, Vanuatu and PNG.

TravelWizard www.travelwizard.com
Luxury travel company merged with Azumano Travel American Express in early 2013, and provide a wide range of luxury packages throughout the South Pacific, including diving.

Uncommon Adventures Dive and Adventure Travel
www.uncommonadventures.com
Unique adventure travel and expeditions around the world combining adventure, culture and dive.

US Dive Travel Network www.usdivetravel.com
Website resource for tropical scuba divers, providing an index of dive resorts around the world as well as a booking facility.

In addition, there are many travel operators, both specialist and general who operate diving holidays to the South Pacific:

A1 Scuba www.a1scuba.com
Adventure Dive and Travel www.goforadventure.com
Adventure Scuba Company www.scubava.com
Deep Blue Adventures www.deepblueadventures.com
Delta Vacations www.deltavacations.com
Dive and Travel Adventures www.diveandtraveladventures.com
Dream Weaver Travel www.dreamweaverdivetravel.com
Fly and Sea Dive Adventures www.flyandsea.com
Inter-Ocean Tours www.interocean.com
Island Dream www.islanddream.com
Kids Sea Camp Inc www.familydivers.com
Manthiri Maldives www.divetravelservices.com
Marso Travel Marketing www.marasomarketing.com
Ocean Adventures Dive www.oceanadventuresdive.com
Ocean First Divers www.oceanfirstdivers.com
Quest Dive Adventures www.questdive.com
Reef Rainforest www.reefrainforest.com
South Pacific Island Travel www.spislandtravel.com
Symbiosis USA www.symbiosis-travel.com
Travel for Teens www.travelforteens.com
Ultimate Dive Travel www.ultimatedivetravel.com
World Dive www.worlddive.com
Worldwide Diving Adventures www.worldwidedivingadventures.com

13.3 Australasia

Abyss Scuba Diving www.abyss.com.au

Scuba diving centre which has a travel centre that organises diving trips to worldwide destinations including PNG, Fiji, Vanuatu and the Cook Islands. Also runs PADI courses and sell dive gear.

Allways Dive Expeditions www.allwaysdive.com.au

Some dive tour operator offering dive holidays to a range of worldwide destinations, both resort-based and liveaboard. Several South Pacific destinations included in portfolio.

Dive Adventures www.diveadventures.com.au

Leading Australian dive travel specialist, Dive Adventures, has been promoting dive holidays for more than 20 years, and the South Pacific is its key destination. Dive sites include the Cook Islands, Fiji, Micronesia, Niue, Solomon Islands, Papua New Guinea, Vanuatu, and Tonga. Dive Adventures promotes its portfolio to a range of customers including individuals, honeymooners, families and group travel.

Dive Fish Snow Travel www.divefishsnow.co.nz

New Zealand's only specialist dive tour operator to the South Pacific.

Infinity Holidays www.infinityholidays.com.au

Wholesale division of Flight Centre Travel Company. Promotes mainstream product to capture high volume; main South Pacific destination is Fiji, and offer watersports including diving to clients who request it.

Qantas Holidays and Viva Holidays www.vivaholidays.com.au

Part of the JTG group, offers tailor made tours to a range of destinations in the South Pacific, which include diving.

Underwater Australasia www.underwater.com.au

An information portal listing Australia and Asia Pacific's most popular dive sites and comprehensive underwater directory.

13.4 Asia

Dive The World (Asia) www.dive-the-world.com

With offices in Hong Kong and Phuket in Thailand, Dive the World offers PADI certification courses and holidays to several destinations in Asia including Thailand, Indonesia and Malaysia, and South Pacific destinations such as Australia and Fiji.

Japan

Diving is included in the portfolios of several tour operators:

World Tour Planners Co.,Ltd. www.wtp.co.jp

Ultramarine Travel Planning Service, Inc. www.u-marine.com

Sun and Adventure Inc www.club-azul.com

Ascent Company Limited www.ascent.co.jp

TNS Travel Inc www.tns-travel.co.jp

S.W.Planning Inc www.scubaworld.co.jp

MIC21 www.mic21.com

TOHO Travel www.tos-asp.jp
Pacific International Limited www.pijpn.co.jp
South Pacific Tours Japan Inc www.sptjpn.com
Merci Tour www.merci-tour.com
PNG Japan www.png-japan.co.jp
Aqualagoon Inc www.aqualagoon.co.jp
Condor Travel Service, Inc www.mambo-tour.co.jp

13.5 Additional Information

Diving Certification in the South Pacific Region

SPAD: South Pacific Adventure Divers, Fiji www.spadfiji.com
Aquamarine: PADI Resort and Training Facility, Vanuatu
www.aquamarinesanto.com
Papua New Guinea Divers Association www.pngdive.com

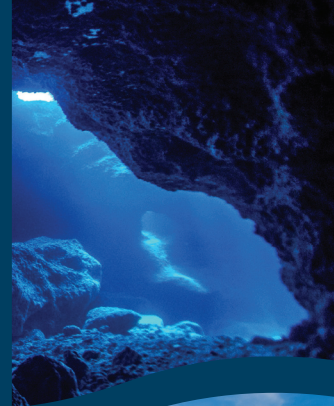
Organisations in the South Pacific Region

DAN Asia Pacific: Divers Alert Network www.danasiapacific.org

International Diving Organisations

BSAC www.bsac.com
NAUI www.nau.org
PADI www.padi.com

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South Pacific Tourism ORGANISATION



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