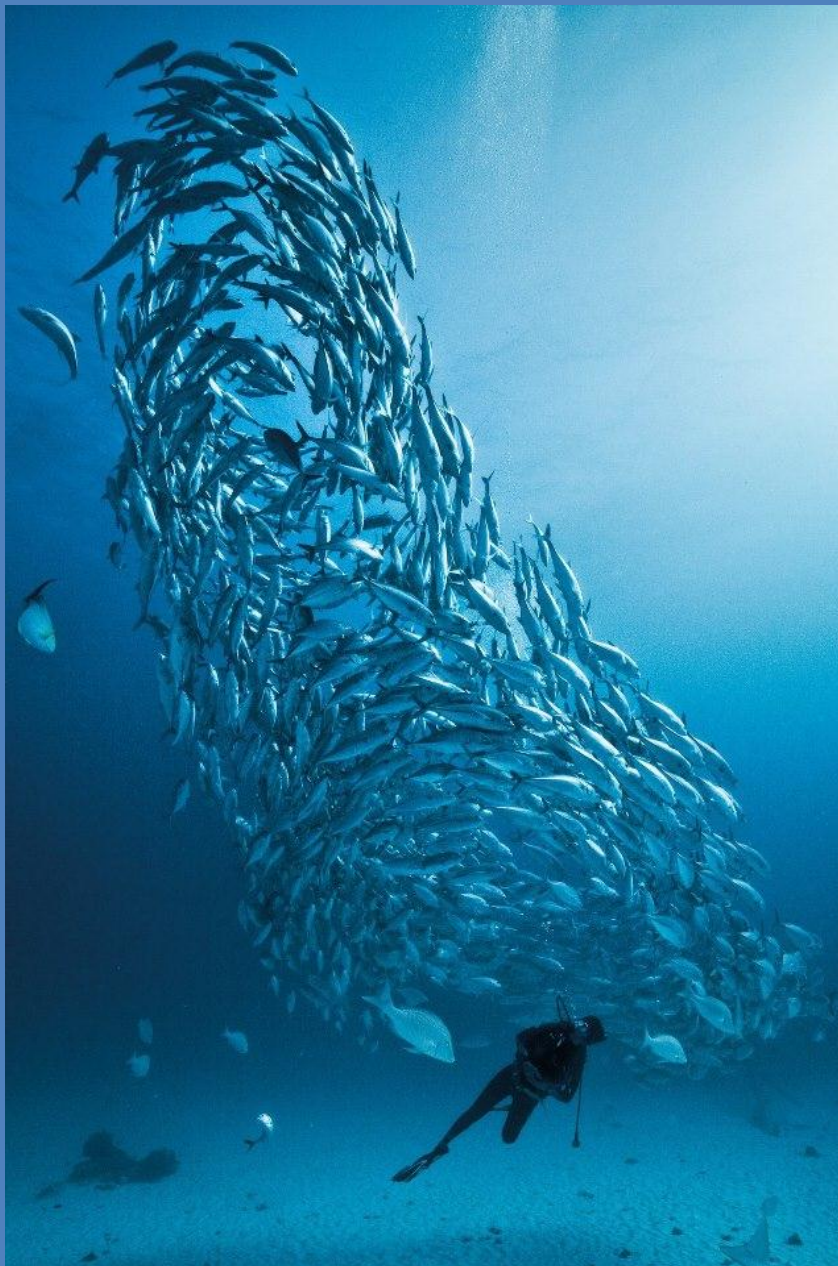
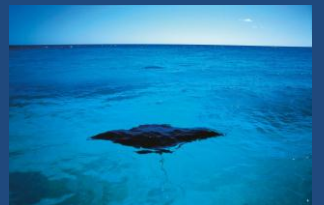


SOUTHERN GREAT BARRIER REEF DIVE



DISCUSSION
PAPER

JUNE 2013



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TOURISM • MARKETING • CONSULTING

TABLE OF CONTENTS

	PAGE
EXECUTIVE SUMMARY	3
BACKGROUND	4
THE DIVE MARKET	5
BEST PRACTICE EXAMPLES	11
DIVE SGBR SITUATION ANALYSIS	20
DEVELOPMENT OPPORTUNITIES	27
FUNDING AND SUPPORT	37
DIVE CLUSTER	38
APPENDIX	39
Research & Information Sources	40
Consultation & Contributors	41
Preliminary Dive Survey Results	42
Shipwrecks of SGBR	52
Marketing & Packaging Examples	53

EXECUTIVE SUMMARY

The Great Barrier Reef is one of the world's iconic destinations and is one of the 7 natural wonders of the world.

Tourism and Events Queensland, in partnership with the regional tourism organisations of the Southern Great Barrier Reef, Bundaberg North Burnett Tourism, Gladstone Area Promotion and Development Limited (GAPDL) and Capricorn Enterprise have identified scuba diving as a hero experience within the greater holiday experience.¹⁹

The objective of the project is to value add to the suite of SGBR experiences to more effectively package and promote the destination. It will contribute to the overall Great Barrier Reef project which aims to reinvigorate the Great Barrier Reef.

THE DIVE MARKET

It is estimated there are as many as 6 million active divers worldwide³ and in Queensland they have a higher length of stay and spend than the average international and domestic visitor.¹

In the last 5 years however Queensland has lost significant market share to South East Asia, particularly in the adventure and learn to dive sectors of the dive market.

An online dive survey is being undertaken as part of this project. The preliminary survey results are included in the Appendix.

WHAT DIVERS LOOK FOR

Water visibility, variety of dive sites and certified tour operators are key factors in determining a good site. Important factors in determining a dive destination also include:-

- Ease and time to get to destination
- Quality food and wine, and

- Cost to get to destination

The market is online savvy, with the internet being the major source of information used, with websites and social media such as Trip Advisor and Facebook being widely used.

BEST PRACTICE EXAMPLES

Several locations from across the world were investigated as popular examples of dive destinations, including Vanuatu, Espiritu Santo Island (SS President Coolidge), Bonaire, The Caribbean, Galapagos, Ecuador and Ningaloo Reef, Western Australia.

All destinations shared significant natural world significance, where the marine species are unique and abundant, and in the case of Vanuatu, heritage significance. They also share a certain 'legendary' status, probably due to decades of word-of-mouth and significant coverage through credible media, such as National Geographic documentaries.

In addition to their outstanding natural significance and diversity, they all shared the common themes of **ease of access** once the destination was reached, **in-depth content** and **strong online presence**.

INDUSTRY CONSULTATION – A COMMERCIAL REALITY

Consultation with the dive industry revealed significant negative impacts and economic factors that have resulted in many closures and change of focus to other markets, such as fishing and servicing the resource sector. These factors included the high Australian dollar, extreme weather such as flooding and cyclones, increasing fuel, vessel and dive equipment maintenance, staff wages and a general tendency of the dive market not to be repeat visitors.

SGBR DIVE EXPERIENCE

The SGBR dive experience is renowned for its coral cay islands, crystal clear waters and un

crowded diving. Most accessible dive sites and major operators are located on or near the islands and coral cays of Lady Elliot, Lady Musgrave, Heron and Great Keppel Island.

The SGBR primarily offers day trips and island resorts with dive facilities, as opposed to dedicated dive resorts and live-aboards. Learn to Dive opportunities are currently restricted to Bundaberg, Heron and Lady Elliot Island resorts.

The core promise for the SGBR is **stunning, secluded reef that's within reach.**

During consultation and from preliminary online survey results, unique selling points are identified as turtles, manta rays, variety of marine life and water clarity. Family friendly holidays for divers was also cited.

DEVELOPMENT OPPORTUNITIES

Several development opportunities are identified to specifically address issues facing the SGBR, namely:-

- Improving access and commercial viability due to distance to the SGBR
- Offering new dive experiences
- Increasing length of stay and spend through dispersal
- Improving the packaging and distribution of SGBR product and destination information

The developments identified are in no way intended as feasibility studies, but rather as opportunities to be further investigated and are related to suggestions from consultation within the region to ensure local and regional support.

Each opportunity has similar examples undertaken in other domestic or international

destinations and possible funding and assistance for these opportunities is identified.

NEW DIVE EXPERIENCES closer to the coast are recommended to improve access and offer existing tourism operators alternative sites during rough seas.

Development of artificial reefs, such as historic ships and underwater sculpture are highlighted.

REEF TRIP EX BUNDABERG to reintroduce reef day trip experiences.

DIVE EVENTS + SPECIAL INTEREST to build repeat visitation and develop new markets.

GREEN + ECO ACCREDITATION to further build on the destination's image through eco accreditation and develop voluntourism opportunities for a market that are green and nature lovers.

PACKAGING + DISTRIBUTION to develop itineraries and increase the presence of SGBR packages and content to compete with competition internationally.

SGBR ISLAND + DIVE TRAIL to encourage cross-promotion, increase length of stay and offer a simple, co-operative example to promote the SGBR destination, dive sites and tourism products.

DIVE CLUSTER

To further the opportunities identified and increase the networking, distribution and profile of diving in the SGBR, the formation of a Dive Cluster is recommended



BACKGROUND

The Great Barrier Reef is one of the world's most iconic destinations for travellers, with five distinct precincts each offering a unique set of experiences: The Wild North, Cairns and Port Douglas, Townsville, Whitsundays and Mackay and Southern Great Barrier Reef.

Scuba diving within the Southern Great Barrier Reef has been identified as a hero experience and is a major drawcard to the region.



GEOGRAPHIC REGION

The Southern Great Barrier Reef (SGBR) destination consists of the regional tourism areas of Capricorn, Gladstone and Bundaberg North Burnett; covering the southern Swain Reefs, Great Keppel Island through to

Heron, Lady Musgrave and Lady Elliot Island.

CORE DESTINATION PROMISE

In partnership with the regional tourism organisations of Capricorn Enterprise, Gladstone Area Promotion Development Limited (GAPDL) and Bundaberg North Burnett Tourism, a core destination promise is: ***"Feel the awe of discovering stunning, secluded reef that's within reach"***

PROJECT OUTCOMES & METHODOLOGY

The objective of the project is to value add to the suite of SGBR experiences to more effectively package and promote the destination and contribute to the overall Great Barrier Reef project, which aims to reinvigorate the Great Barrier Reef.

The methodology for the project involves six phases including specific outcomes as outlined below. At the completion of the project a Dive SGBR e-guide will be produced. This discussion paper represents phases 1-4 of the project.



THE DIVE MARKET

BACKGROUND

An extensive desk top audit was undertaken to develop a current snapshot of the recreational dive market globally with a particular focus on Queensland and Australia. To further support this snapshot, an online dive survey is currently underway with results to be delivered in June. The interim online survey results are included in the Appendix.

There have been no recent comprehensive surveys of diving in Australia since 2007, when the International and National Visitor Surveys included a special supplementary section on Dive and Snorkel activities¹. Much information about the market in Australia is dated, particularly given the impact of GFC and weather conditions in the past 3 -5 years. The State of the Reef Report¹¹ published in 2009 by the Great Barrier Reef Marine Park Authority (GBRMPA) does track the influence of these factors on reef tourism as a whole but not specifically on diving. The most recent research located was that undertaken by Diversone.com, **Global Divers Survey 2011-2012**

MARKET SIZE

There are as many as 6 million active divers worldwide.³

In the US there are an estimated 2.7 and 3.5 million active divers³ and in 2010 around 2.7 million Americans went scuba diving at least once, but the number of people with dive certifications is substantially higher.⁵

There are approximately 2 million certified divers in Europe.⁴

ESTIMATED ACTIVE DIVERS

6m worldwide³

3m USA³

2m Europe⁴

35,000 Australia²

A study by the Australian Sports Commission in 2000 estimated there were more than 34,600 active divers in Australia.²

THE VALUE OF THE MARKET

In 1996 Dive Queensland estimated the tourist diving industry was worth \$450 million to Queensland each year.⁹

The WTO (2001) estimated that one in three divers would take an international holiday annually, estimating the international diving tourism market to be worth between US\$4-6 billion.⁴

According to the interim results of the online 2013 Dive SGBR survey, nearly 60% of respondents were planning a dive holiday within a year, with 51% estimating their next holiday spend to be over \$3,000

WHO ARE SCUBA DIVERS?

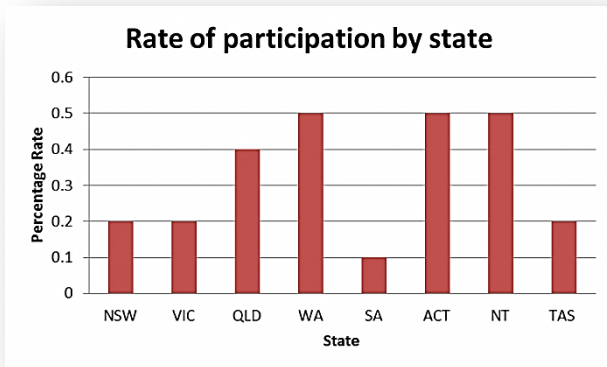
There are a number of reports and surveys on the "typical diver" and figures vary slightly from report to report^{1, 2, 3} but for countries such as the USA, Australia and Europe this person is generally:

- Male (estimates vary between 60% - 80%)
- Aged between 29 - 50 years
- A white-collar worker
- Someone who tends to stay longer on holidays and spend more
- Unlikely to decrease participation as they get older
- Concerned with the environment
- Interested in travel and adventure

Most respondents in the 2013 Dive SGBR survey considered themselves a family person, closely followed by an adventurous person. They were concerned with contributing positively to the environment and quality accommodation, food and services were more important.

AUSTRALIAN DIVERS

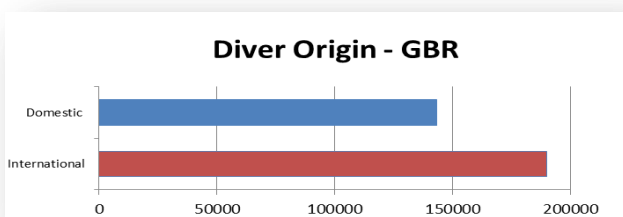
In the year 2000 the Australian Sports Commission report Active Australia found the participation rate for scuba diving was estimated to be less than 1% of the population, with almost 57% of active divers residing in New South Wales or Queensland.²



Active Australia-The Numbers Game²

THE QUEENSLAND DIVE MARKET

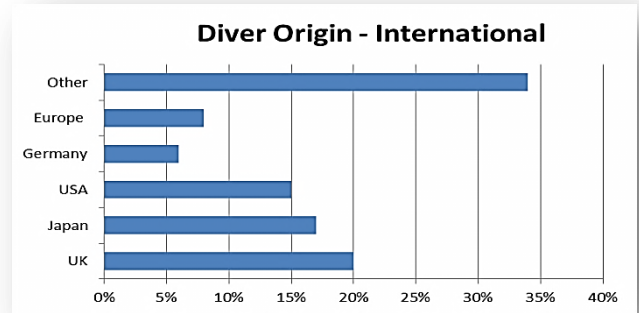
From the TEQ Recreational Dive and Snorkel Market Summary 2007¹. Queensland hosted more than 345,000 divers domestically and internationally.¹



TEQ Recreational Dive and Snorkel Market Summary 2007¹

The International Market – Great Barrier Reef¹

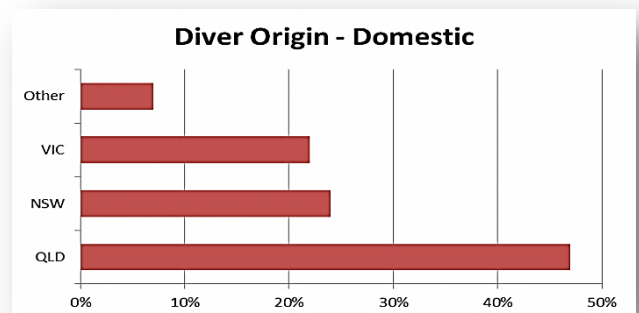
- The majority were under 35 and travelled alone (48%).
- More than 50% were uncertified divers.



TEQ Recreational Dive and Snorkel Market Summary 2007¹

Domestic Market – Great Barrier Reef¹

- The majority were under 35 (65%).
- Likely to travel alone (28%) or as a couple (28%).
- Most were certified divers (52%).

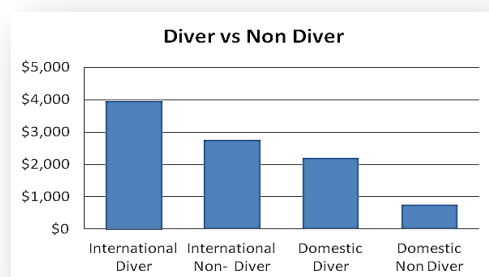


TEQ Recreational Dive and Snorkel Market Summary 2007¹

Visitor Spend & Length of Stay – Great Barrier Reef¹

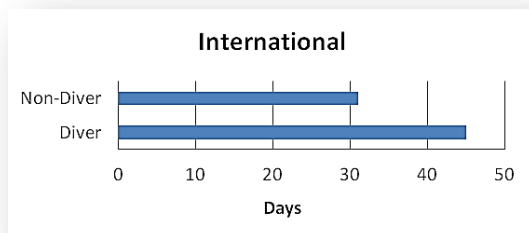
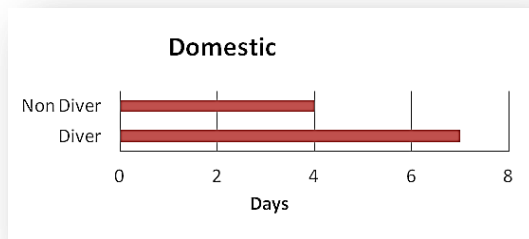
A diver's visitor spend and length of stay is higher than the average international and domestic non-diver visitor.

Spend



TEQ Recreational Dive and Snorkel Market Summary 2007¹

Length of stay – Domestic + International¹



TEQ *Recreational Dive and Snorkel Market Summary 2007*¹

TRENDS IN THE MARKET - AUSTRALIA

Research shows that since 2005, the number of tourism visitors to the Great Barrier Reef has been in decline ⁴.

This decline has been attributable to mostly external factors, namely the high value of the Australian dollar, making travel to Australia expensive and competing dive destinations, for example, in Asia, more attractive, for both the international and Australian diver.

Extreme weather events have had a major impact on the Great Barrier Reef, with extreme heat leading to coral bleaching, a record numbers of cyclones and numerous flooding events¹⁰. The impact of the actual event combined with the negative national and international media coverage that follows has given little time for tourism operators to re-establish themselves.

In addition, there is significant anecdotal evidence to suggest the demand for diving activity across the country has grown little⁴ and the drop in the number of international visitors being certificated on the Great Barrier Reef is

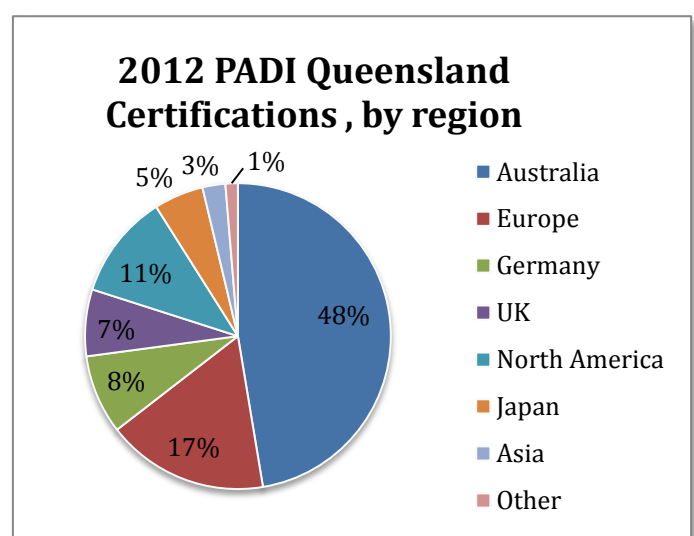
one area where demand has declined considerably. PADI Dive and Scuba School International (SSI) are the two major dive certification schools holding approximately 50% of the market in Queensland.

According to the President of the Association of Marine Park Tourism Operators (AMPTO) and ex Scuba School International (SSI) Queensland proprietor, some 42,000 diving certifications per annum are being lost in Queensland to other areas of SE Asia, such as Indonesia and Thailand, which are gaining 10,000 – 60,000 certifications per annum.

According to PADI Dive certifications for the Asia Pacific Region, the last three years have grown significantly year on year, however the overall results do not reflect this trend in Queensland or Australia.

The AMPTO President also cited the introduction of faster and cheaper dive certification as a reason why the number of businesses in the dive market in Queensland has decreased, and particularly with the high Australian dollar the reason why many visitors are now being certified in Asia.

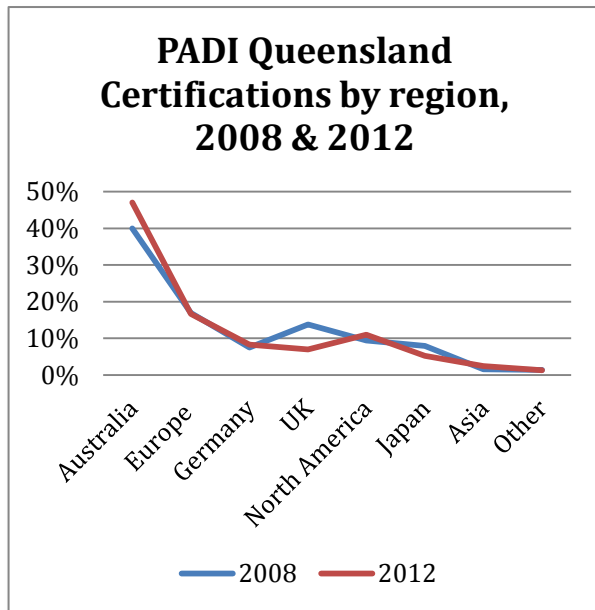
PADI Asia Pacific has supplied the breakdown of PADI Dive certifications completed in Queensland during 2012.⁶



PADI Worldwide Corporate Statistics ⁶

When these figures were compared to 2008, the UK and Japan source markets had declined.

Australians and North America represented the most growth*, with Asia, particularly China, (almost doubling), although still accounting for less than 3% of total visitors obtaining dive certification by PADI. *Please note this is growth of source not total numbers.



PADI Worldwide Corporate Statistics 6

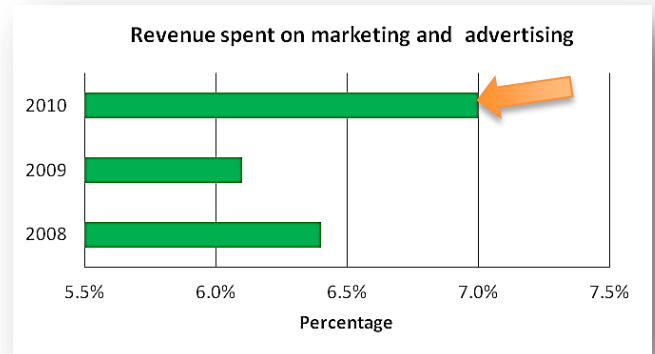
TRENDS IN THE MARKET – USA AND BEYOND

US research indicates that like many activities requiring specialised equipment, participation in scuba diving has declined in recent years.

The study from 2010 indicates the number of people in the US who participate in diving at least once per year has decreased by 37% since 2001. However, worldwide, the number of new people becoming certified by PADI has remained fairly steady over the past 10 years. ⁵

In 2001 the World Tourism Organisation reported that more and more locations around the world were constantly trying to tap into the dive market and establish themselves as international diving destinations. ⁴

According to the Cline Group's 2011 US Dive Retailer Financial Study⁷ overall revenue for the dive industry has dropped by 14% from 2008 to 2010. Despite this, advertising and marketing expenses have increased.



Cline Group's 2011 *US Dive Retailer Financial Study*⁷

This trend of decreased spend on dive retail products is important to note, as it has a direct correlation on the profitability of businesses in the market.

According to the AMPTO President, for many dive businesses, it is the sale of equipment that contributes to profitability, even more so than diver certification and dive tours. It also influences a diver's satisfaction with the sport i.e. those that purchase their own equipment enjoy the experience more and are likely to be committed, active divers, who will take regular dive holidays.

WHAT DO DIVERS LOOK FOR IN A DESTINATION?

Desk top research and consultation indicates that divers create a list of destinations based on at least some of the following:

- Quality of the diving (related to their interests and experience level).
- Variety of dive sites and experiences (e.g. wrecks, marine life interactions, coral reef).
- Abundance and type of wildlife.
- Price.
- Accessibility (including travel time).

- Reputation (is it on their bucket list?).

According to the interim results of the Dive SGBR survey, **Water visibility** is the number one, most important factor for selecting a dive location, followed by a **certified tour operator**. Diversity of marine life, coral, small marine and large marine animals were also very important.

In addition to a great dive site, respondents in the Dive SGBR survey were asked to identify what was also important to selecting a **dive destination**.

The 3 **very important** factors were

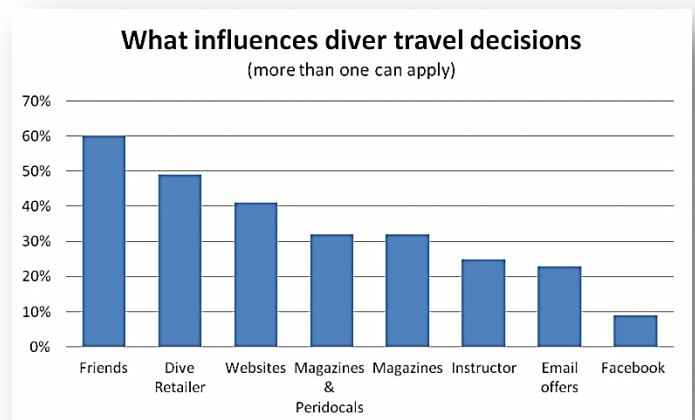
- Certified dive tour operator (the most important factor)
- Safe destination, and
- Cost and quality of accommodation

And 3 top **important** factors were

- Ease and time to get to destination
- Quality food and wine
- Cost to get to destination

respondents were from the US with the next largest groups being from Australia and Canada at 4%). They found the results for influences on diver travel decisions, diving interests and their other hobbies.

Friends are most important influences, followed by dive retailers and websites. Boat diving was important to them, as was photography and they love to travel.



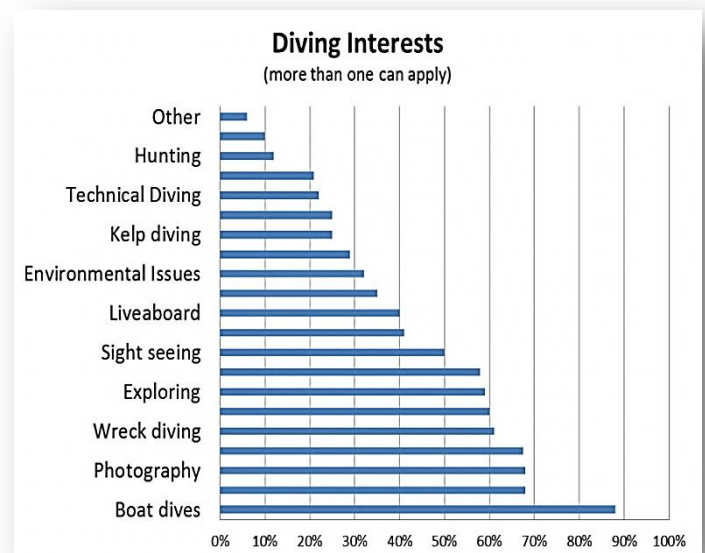
Global Divers Survey 2011-12 Diversone.com⁸

WHAT INFORMATION INFLUENCES A DIVER'S TRAVEL DECISION?

The desk top review and discussions with divers indicates the profile and reputation of a dive site / destination tends to be driven by other diver feedback via personal interactions and targeted diving publications, websites, online forums, television documentaries and particularly programs articles in publications such as National Geographic and Discovery channel.

The "want to visit" dive locations around the world such as Galapagos and the Great Barrier Reef have stayed reasonably consistent over time with "new discoveries" making their way into this space as regions become more accessible, and particularly more affordable.

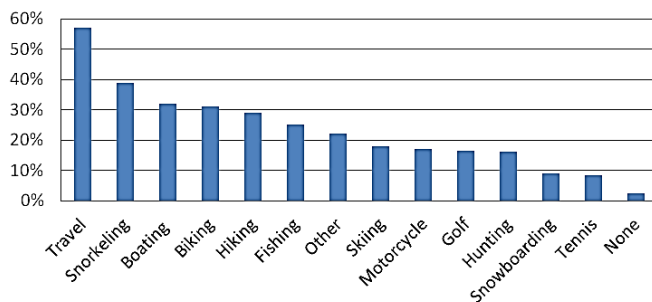
A global divers' survey of 450 divers in 39 countries was undertaken by the Diversone.com in 2011-2012⁸ (77% of



Global Divers Survey 2011-12 Diversone.com⁸

Divers - other hobbies

(more than one can apply)



Global Divers Survey 2011-12 Diversone.com⁸

INFLUENCING THE DECISIONS OF AUSTRALIAN DIVERS

In Australia there are several publications aimed at divers, some specifically aimed at scuba diving, others at free diving, photography and nature. These include:

- Sport Diving
- Dive Pacific
- Dive log (free publication)
- Australian Geographic

According to the Dive SGBR respondents, the internet played the most important role for sourcing information for a dive holiday, followed by friends and family.

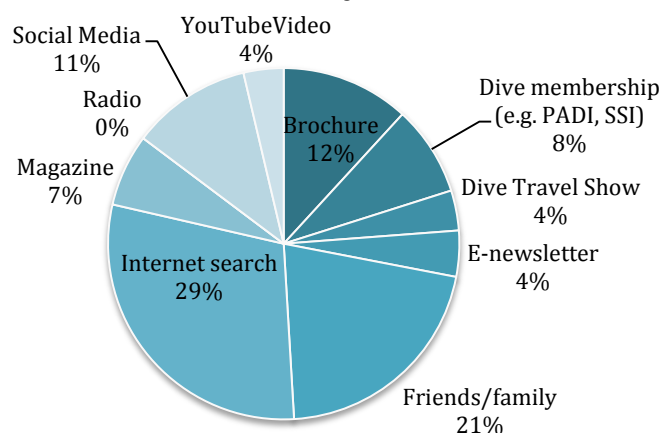
Of these respondents, Facebook and Trip Advisor were the most commonly used websites, followed by Queensland Holidays, Padi, Dive Queensland, Underwater.com.au (14%) and scubadiving.com (10%)

There are numerous diver forums, websites and Facebook pages including: Dive-Oz Web (www.diveoz.com.au), Underwater Australasia (www.underwater.com.au), Wannadive (www.wannadive.net) and Divers One (www.diversone.com)

Some dive-related sites which have a strong following on Facebook, include:

- PADI international – 618,000 likes
- Scuba Diver Life – 588,500 likes
- Underwater Australasia - 42, 672 likes
- Australian Marine Conservation Society - 16,400 likes.
- Save Our Marine Life (Australia) – 13,850 likes
- Pro Dive Cairns - 8,700 likes
- Sportdiving Magazine – 1,100 likes
- Dive Log Australasia - 966 likes
- Dive Worldwide - 610 likes
- Dive 2000 (Sydney) – 364 likes

Sources of information used for a dive holiday



Preliminary results, online SGBR Dive Survey 2013

2.0 BEST PRACTICE EXAMPLES

The Great Barrier Reef has been a premier diving location for many decades and is often listed as one of the 7 natural wonders of the world. It's hard to find better practice examples than those close to shore, such as Mike Ball Dive Expeditions and Spirit of Freedom in Cairns and the partnership between the tourism industry and the Great Barrier Reef Marine Park authority with Reef Watch, whereby tourism operators 'keep an eye' on the reef with site reports and research on coral and marine life.

With the strong Australian dollar and extreme weather conditions facing Queensland over the past 5 years, the dive industry has and is continuing to suffer from extreme international competition, particularly from SE Asia and the Pacific. It has become increasingly cheaper for international and Australian travelers to learn to dive, upgrade their diving certifications and to experience dive holidays that offer quality diving and outstanding service.

For this reason, many overseas dive destinations have been selected as best practice examples, based on their reputation as a dive destination, rather than their specific business operational and environmental practices.



As Tourism & Events Queensland is also investigating targeting the US dive market, there is a focus on some destinations close to this market.

Of the international destinations on the list, once a diver reaches the destination, dive sites can be reached within 15 – 30 minutes of shore.

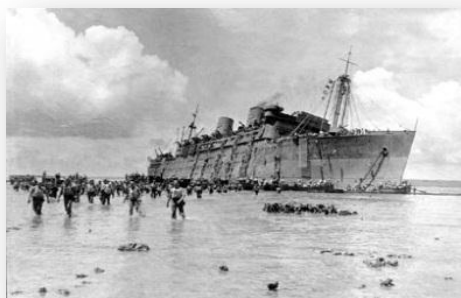
SO WHO MADE THE LIST?

1. Vanuatu, Espiritu Santo Island (SS President Coolidge)
2. Bonaire, The Caribbean
3. Galapagos, Ecuador
4. Ningaloo Reef, Western Australia



VANUATU - ESPIRITU SANTO ISLAND

Vanuatu is a South Pacific island nation made up of more than 80 islands, some of them active volcanoes. It's a welcoming, friendly place to visit with a number of activities and sights for all budgets and interests. It's a particularly popular destination for scuba divers. Espiritu Santo Island is the home of the wreck of the SS President Coolidge, the main diving attraction for the region.



WHY IT'S ON THE LIST?

The site appears on CNN's World's 50 best dive sites of 2012 and Scuba Diving Magazine's 100 Readers' Choice Awards and Gold List 2012 for the Best Shore Dive: SS President Coolidge.



Anecdotal evidence suggests this site is often listed as one of the top dive locations by Australian divers. When several dedicated divers who live in the SGBR region were asked 'what's your favourite dive spot', the SS President Coolidge was repeatedly mentioned.

WHY DIVERS LOVE IT?

- The enormity of the President Coolidge, a massive luxury liner converted to a troop carrier for the war effort and sunk in 1942. Because the ship went down within meters of shore, beginner divers can enjoy this spectacle alongside more experienced ones.
- Variety of dives on the Coolidge – it has 10 distinct sites.
- Ease of access and variety of sites - All dive sites can be reached within 15 to 30 minutes of departure from the dive shop by either boat or shore access.
- The fish, coral and variety of diving - fantastic drop off sites underwater, interactions with sharks, cave diving
- Million Dollar Point (at the end of WWII, thousands of tonnes of US military equipment was dumped into the sea).
- Photographic opportunities.
- Dive sites are well protected with calm and warm waters all year round (from 25 to 30° C), and good visibility (from 10m to 40m).
- Friendly locals and a range of non-diving activities on offer.
- Ease of access.



DESTINATION MARKETING

The destination (especially the Coolidge) receives strong coverage in dive publications, with multi page features in the latest Sport Diving magazine and Dive Pacific April / May 2013, both focuses on just diving on the Coolidge. Operators also advertise individually or as a group under the banner of the Vanuatu Scuba Operators' Association. Air Vanuatu has an extensive packaging section on its website, and takes part in trade and consumer shows.

The destination website, **Vanuatu Tourist Information Centre** has good generic information with dive sites listed alphabetically.

An operator, Aquamarine.com promotes all dive options on the island and encourages non diving activities spread across the island.

They provide links to booking agents that know how to get you there and offer accommodation packages or links to providers.

DIVE PACKAGES

The destination is well represented on dive travel websites and brochures such as Dive World Wide and Air Vanuatu.



10 Best Dive Spots in Vanuatu

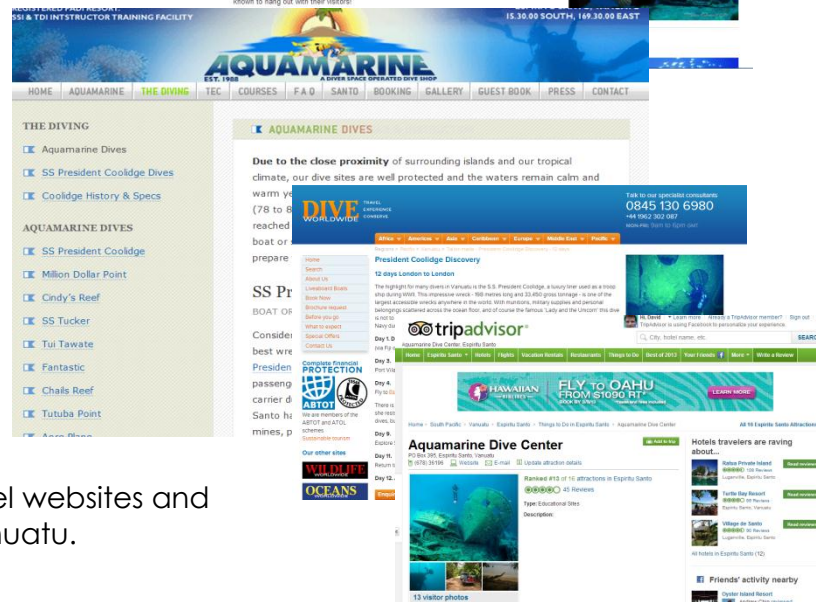
With blue skies, gentle waves and fish spanning every color of the rainbow, Vanuatu has become a favorite spot of divers all around the world. But where should you begin? With over 80 islands in all, how do you know which are hiding the best cliffs, canyons and coral? Before you put on your wetsuit, consider these ten locales.

Tranquillity Bommies

Location: Moen Island

Best For: Beginners, Casual Divers

Description: With clear, calm waters and near-perfect visibility, Tranquillity Bommies is one of the best places you can begin your Vanuatu diving tour. Get your feet wet on the white sand beaches, then hop on a boat or wade among the turtles for your trip under the sea. Not only will you enjoy amazing views of fish, coral and underwater currents, but a few brave divers have even been known to hang out with their relatives!



SOCIAL MEDIA

Facebook does not seem to be a medium used by these dive operators. The Vanuatu Tourist Information Centre Facebook page has 3,900 likes. The destination has a strong social media presence on diver forum sites. This presence is being driven by **divers** not the destination.

Strengths

Great destination for all divers with a huge range and variety of dive options and experiences. Fish, sharks, coral, wrecks (SS President Coolidge, USS Tucker), Million Dollar Point, fresh water cave diving with sinkholes and caverns.

Strong dive representation on Vanuatu Tourism Information Centre website with links to operators. Strong online collaborative presence. All operators promoting the diving promote the destinations.

Ease of access to sites - **All dive sites can be reached within 15 to 30 minutes of departure from the dive shop by either boat or shore access.**

Variety of non-diving activities promoted and encouraged by dive operators variety of accommodation types and levels

Weaknesses

Espiritu Santo Island is one of many Islands – do not promote other regions.

Individual operators are still the drivers of the Dive Trail concept to expand visitors' stay. The tourism site promotes the options but does not connect them



BONAIRE

Bonaire's pristine reefs and diverse marine life are unique to the Caribbean, and are untouched and unspoiled. The island's location in the south Caribbean gives it an arid climate with little rainfall, so the water is exceptionally clear of silt and calm. It is an ideal destination for underwater photographers. Visibility often averaging more than 30 metres, and frequently, more than 50 metres.

"In 1961, while most places were still nailing turtle shells to the wall and slurping turtle soup, Bonaire was protecting sea turtle eggs and nests. In 1971, at a time when divers carried spear guns in much the same way today they tote underwater cameras, Bonaire banned spearfishing. In 1975, the island made it illegal to break coral, take or sell it and the Marine Park was established in 1979."

WHY IT'S ON THE LIST?

Bonaire appears on most lists of best top 10-50 dive sites. In 2012 Scuba Diving Magazine's 100 Readers' Choice Awards and Gold List voted "anywhere on Bonaire" as the best dive site. It also received Best Shore Dive, Best 24/7 Dive Destination, Best Dive Operation and Best Dive Resort. Anecdotally this site is often one of top five referred to when Australian divers are asked to name their top sites.

WHY DIVERS LOVE IT?

- Bonaire is the exposed top of a submerged mountain, with world-class diving 200 metres from shore. Considered the world's premier shore diving location, divers can access 53 of Bonaire's 86 dive sites without a boat.
- The variety and abundance of marine life. More than 470 fish species are found.
- All-inclusive resort and diving deals (including rental trucks).
- Good value for money– mostly due to the amount of great shore dives.



Dive resorts on Bonaire are known for treating guests like family and most offer all-inclusive specials and 24/7 diving on house reefs (the reef in front of the resort).

MARKETING

Most marketing is undertaken by operators, many of whom operate multiple diving options such as "buddy dive". This is a resort-based operator offering diving, restaurants, bars, accommodation and tour options. At the Diving Equipment & Marketing Association (DEMA) Dive show 2012 there were 13 exhibitors representing products in Bonaire. They included Buddy Dive, Bonaire Hotel and Tourism Association and Tiara Air Aruba

ONLINE

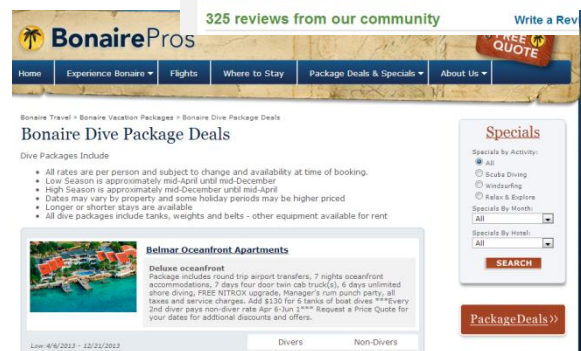
The destination provides comprehensive information on destination and promotes members products, map and information of all dive sites on the island. Buddy Dive, packages all dive options for the island and encourages non diving activities spread across the island **and** extension packages to their other operation in the Galapagos.

SOCIAL MEDIA

Facebook is a medium used by many operators in this region including Buddy Dive Resort with 4,020 likes, Caribbean Club Bonaire with 825 likes, Bonaire - Dutch Caribbean (tourism site) 14,000 likes. Bonaire has strong coverage on diver forum sites and a wide range of products with multiple reviews on trip advisor.

Dive Packages

There are many operators promoting dive packages, many offer free diving and additional land based activities with good representation on dive travel websites.



Strengths	Weaknesses
Considered the world's premier shore diving location, divers can access 53 of Bonaire's 86 dive sites without a boat.	Much of the promotional collateral talks about lots of sites but does not differentiate between sites.
Great map of all dive sites on the island with descriptions and images enabling easy planning. Number of live-aboard options offering a diverse range of dives.	Mostly promoted are water based. There are a number of others activities not as widely promoted e.g. viewing huge flocks of flamingos (40,000-50,000). Washington-Slagbaai National Park, a nature sanctuary for parrots & iguanas
Large variety of accommodation available	
Many resorts offer all-inclusive resort and diving deals (including rental trucks) to allow easy access.	
Many operators promoting the destination. The Bonaire Hotel & Tourism Association represented the destination at DEMA in 2012.	



GALAPAGOS ISLANDS

The Galapagos Islands are a World Heritage site located 1,000 km from the Ecuadorian mainland in South America. The archipelago consists of 13 major islands, of which 5 are inhabited. The Galapagos Islands, which has been referred to as a unique "living museum and showcase of evolution".

Most people book their Galapagos diving trip as a complete package on a live-aboard boat. All diving tours in Galapagos Islands are coordinated by diving guides who are licensed by the Galapagos National Park Service. The National Park Service has recently loosened regulations for live-aboards, now permitting night diving, 4 (vs. 3) dives per day and a land visit to a site (normally only accessible to naturalist cruises).



WHY IT'S ON THE LIST?

Galapagos appears in almost every list of "to do dive sites". In 2012 the Islands were chosen in CNN's World's 50 best dive sites, Scuba Diving Magazine's 100 Readers' Choice Awards and on the Gold List 2012 for Best Dive Site: Darwin's Arch and Best Animal Encounter: Hammerheads.

WHY DIVERS LOVE IT?

- Diversity and type of marine life! Equatorial penguins diving with marine iguanas, dolphins, schools of Hammerhead sharks, Eagle rays and Barracudas, sea lions, sharks and rays, and whale sharks. *One in every four marine species is endemic.*
- It is a unique diving experience - not recommended for inexperienced or learner divers. Participants need to dive with 7mm wetsuits.

MARKETING

The destination receives extensive coverage in natural history documentaries screened around the world. There is strong coverage in dive publications worldwide (e.g. multi page feature in the latest Australian Sport Diving Magazine, April / May 2013). Most marketing activities undertaken seem to be conducted by operators, and involve offers of multiple diving options such as "Diving the Galapagos", which feature a variety of live-aboard charter boat and land destination options.

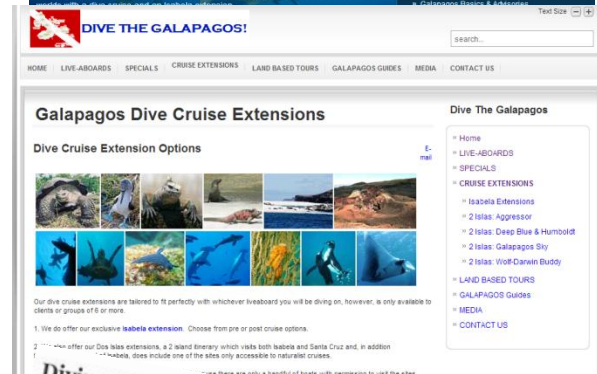
At the DEMA Dive show 2012 there were a number of operators exhibiting including Buddy Dive, Red Mangrove Galapagos and Ecuador Lodges. LAN Airlines also uses images of the Galapagos to promote flights to South America.

ONLINE

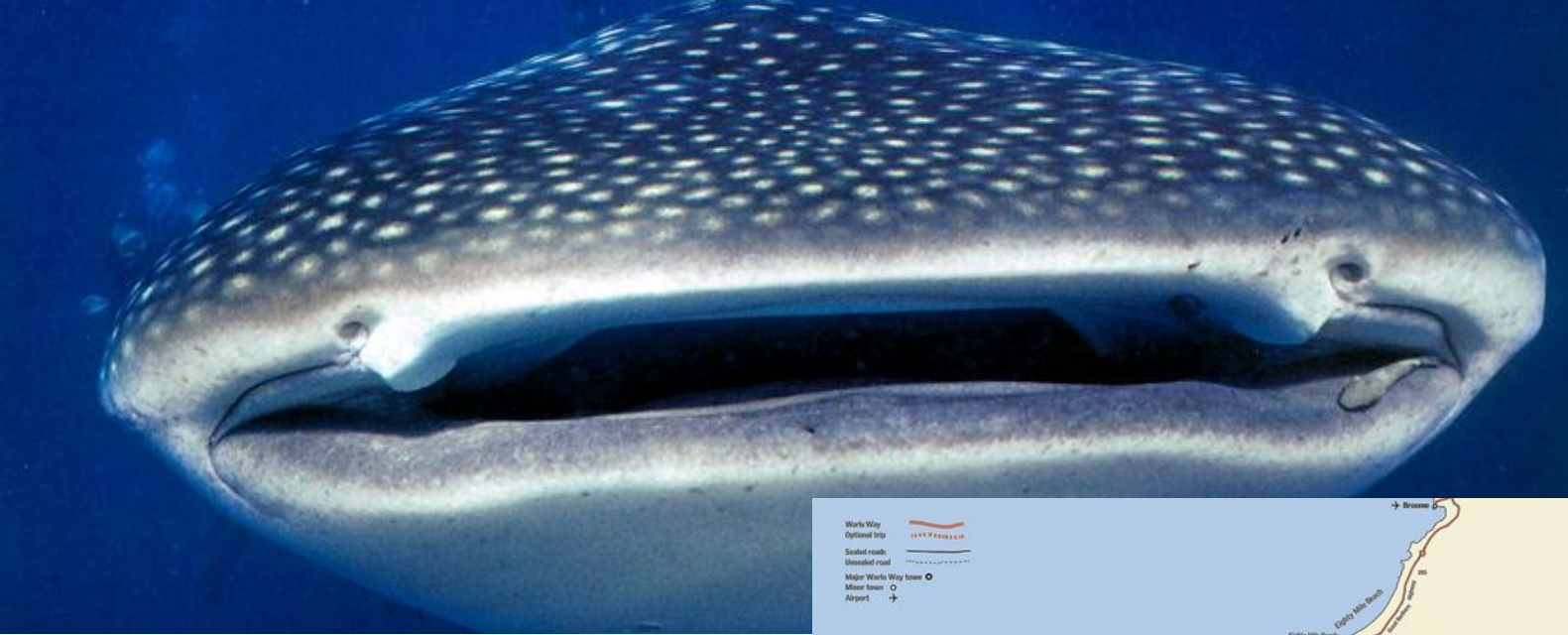
The destination is well represented on dive travel websites with good operator websites featuring multiple live-aboard charter boat and destination options, offering a number of land based extension tours to live-aboard packages. They provide information about flights and access. As well as **local issues that may interest divers such as conservation and access**.

SOCIAL MEDIA

The Galapagos Islands receive strong coverage on diver forum sites and trip advisor. Facebook does not seem to be a medium used by operators. Social media presence is being driven by divers rather than the destination. Diving the galapagos.com provides an active and comprehensive blog.



Strengths	Weaknesses
The archipelago consists of 13 major islands creating a number of areas with unique experiences.	Land based operators limited to close locations.
Most diving is done via live-aboard vessels which move between sites easily.	Land based visitors tend to be limited to one location dive due to time and cost restraints.
Live-aboard trips are reasonably expensive compared with other destinations around the world.	
For land based visitors there are many unique wildlife interactions; although new parks access now allows live-aboard operators to visit land sites, in addition to night diving.	Live-aboard vessels have limited access to land based activities.
Many operators in the market promoting the destination.	Marketing activity is undertaken by individual operators not as a collaborative exercise.



NINGALOO REEF WESTERN AUSTRALIA

The largest fringing coral reef in Australia, 300km-long Ningaloo is not just home to whale sharks, but is the most sizable reef in the world found so close to a continental land mass. Part of the World Heritage-listed Ningaloo Coast area, it hosts 300+ species of coral and 700+ species of reef fish.

Why it is on the list

Listed in Australian Geographic's Top 10 Best dives sites in Australia 2012, it is on the UNESCO World Heritage list for its incredible biodiversity. It is one of the few places in the world where divers can swim with the largest fish in the ocean, the gentle whale shark.

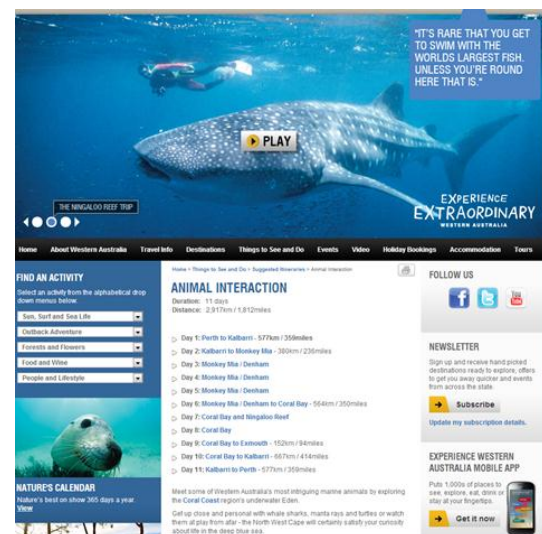
Why Divers love it:

- The opportunities to swim with **whale sharks**, humpback whales, dolphins, dugongs and manta rays
- General diversity of marine ecology,
- Nest turtles (seasonal)

Marketing

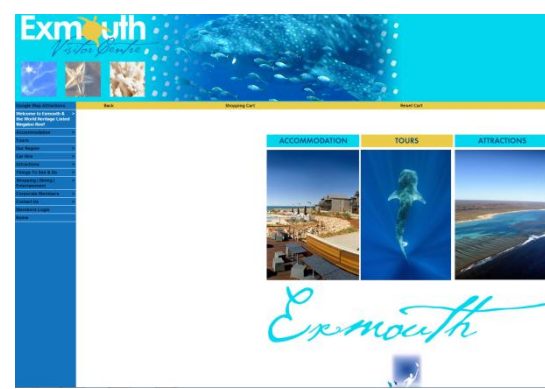
Ningaloo is marketed by Tourism Western Australia as part of an "animal interaction trail" 11 day drive experience and a "Ningaloo Reef" 8 day experience.

Whale shark encounters and the destination receive media coverage in dive publications, natural history documentaries and tourism publications around the world. The site also attracts coverage from visiting Journalists writing for publications such as the QANTAS inflight magazine and The Weekend Australian.



Exmouth Destination Website

- Provides comprehensive information about the destination and promotes members' products.
- Difficult to navigate and plan a trip.



Operator Website

Ningaloo Whaleshark n Dive

- Promotes all diving activities
- Partners with an accommodation provider

Social Media

Facebook is a medium used by many operators including Three Islands Whale Shark Dive (700 likes), Ningaloo Whaleshark nDive (119 likes), Ningaloo Safari Tours (71 likes). Ningaloo has strong coverage on diver forum sites and a wide range of products with multiple reviews on trip advisor.

Dive Packages

There are many operators promoting dive packages. Many offer free diving and additional land based activities. The site has good representation on dive travel websites and brochures such as www.diveworldwide.com.



Strengths	Weaknesses
Stunning dive sites and encounters.	
Variety of accommodation to choose from.	Remote location – accommodation & access can be expensive.
As it is a remote location transfers tend to be included or well explained.	
Cape Range National Park Tour - encompassing rugged canyons, beautiful beaches, a bewildering variety of flora and fauna, a boat trip up Yardie Creek Gorge and a guided snorkelling tour at Turquoise Bay.	This is a remote location – the attractions are adventure based.
Ningaloo is marketed by Tourism Western Australia part of an "animal interaction trail" 11 day drive experience and "Ningaloo Reef" 8 day experience.	The WA tourism trails do not seem to have been embraced by operators. Most dive operators do promote other tours and activities to do in the region.

DIVE SGBR SITUATION ANALYSIS

To gain insight into the Southern Great Barrier Reef (SGBR) dive experience and product offerings industry consultation was undertaken during April and May 2013 including face-to-face meetings within the region, phone and e-mail communication with:-

Regional Tourism Organisations, dive tourism operators in the SGBR, online dive travel sites, local, state and federal government agencies, including the Great Barrier Reef Marine Park Authority (GBRMPA), dive associations and dive enthusiasts. A list of contributors and consultation is included in the Appendix.

THE SGBR DIVE EXPERIENCE

The Southern Great Barrier Reef dive experience is renowned for its coral cay islands and crystal-clear waters where you can swim with resident Manta Rays, see the nesting and hatching of loggerhead turtles and feel like Robinson Crusoe on an island getaway without the crowds.

So good is the diving, world famous undersea explorer Jacques Cousteau listed the Heron Bommie as one of his top 10 favourite dive sites in the world. Most recently, in February 2013, PADI DIVE listed Lady Elliot Island as number one in the top 5 Manta Ray Dive Destinations of the world.



Most major dive locations and tourism operations in the SGBR are located on or near the islands and coral cays of:-

Great Keppel Island

Heron Island

Lady Musgrave Island, and

Lady Elliot Island

1.1 EXISTING PRODUCTS + EXPERIENCES

Generally dive products and holidays promoted online, in dive media and through dive related travel agents are categorised as:-








- Live-aboard
- Dive Resort
- Dive Destination
- Learn to Dive
- Day Dive Trip

The SGBR primarily offers **day dive trips** and **island resorts with dive facilities** (i.e. Lady Elliot Island Eco Resort and Heron Island Resort) as opposed to dedicated dive resorts, where the resort caters solely to a dive market.

The **live-aboard** dive opportunities are ex. Brisbane or by charter boat within the region.

Learn to Dive opportunities are restricted to Bundaberg and the two island resorts. For this sector of the market, if SGBR is to compete in an international and adventure market, learn to dive opportunities need to be further developed, and existing ones more readily promoted and networked in the wider destination tourism offering.

The following table outlines diving related tourism services available in the SGBR, including island and diving sites. There are more dive sites, ship wrecks and charters in the region, but below are those currently operating in the leisure dive market.

Site	Description	Tourism Operations
Lady Elliot Island 	<p>Renowned for visibility and diving with 40 resident manta rays, plate coral, and big fish. Divers can swim through the blow hole, 16m (52 ft.) down.</p> <p>Snorkeling and diving trails/maps available.</p> 	 <p>Lady Elliot Island Eco Resort suites, rooms & cabin accommodation, meals, dive centre</p> <p>ACCESS: Only accessible by flights direct from Gold Coast, Brisbane, Bundaberg & Hervey Bay</p>
Bundaberg/Bargara 	<p>Top coast/shore diving, Hoffman's Rock, Barolin Rocks and Double Rock – Burnett Heads, Bargara to Elliot Heads.</p> <p>Offshore, Cochrane Artificial Reef (ships/planes/dive trail)</p> 	<p>Dive Schools – Aqua Scuba and Hein Dive (specialising Korean market)</p>  <p>ACCESS includes Bundaberg Dive Charters "Dive-a-holic" from Baffle Creek (south of Bargara) and Venus II ex Bundaberg Marina.</p>
Lady Musgrave Island 	<p>Coral cay with reef fringed lagoon, over eight km in circumference. Good snorkeling and dive location for beginners and experienced divers.</p>	<p>Day trips ex. Town of 1770 with Lady Musgrave Cruises. Also catering for Asian market ex. Gold Coast (bus transfers to 1770)</p> <p>Island camping available with QNPWS permit. ACCESS: Transfers for campers with Lady Musgrave Cruises ex. 1770 and Curtis Ferry Services ex. Gladstone.</p>

Agnes Water/Town of 1770



Shore diving at Pancake Creek – unique shore diving with hard and soft corals (*see where reef is made*)



Backpacker to 4 star accommodation at Agnes & 1770. Good 'deco' (decompression days area) for SGBR between Bundaberg and Gladstone. ACCESS: Pancake Creek with The Larc.

Fitzroy Reef Lagoon



Stunning reef lagoon, 75 mins ex Town of 1770.

ACCESS: Lady Musgrave Cruises ex 1770

North West, Mast Head + Erskine Islands (Capricornia Cays National Park)



Coral cays north east of Gladstone. Stunning white beaches, shore diving and snorkelling.



QPWS camping permit required. BYO all equipment.

ACCESS: Curtis Ferry Services from Gladstone Harbour, charter or private boat

Curtis Island National Park



Large island off the coast of Gladstone with wind swept scrublands and pristine beaches.

QPWS camping permit required. BYO all equipment.

ACCESS: Curtis Ferry Services from Gladstone Harbour, charter or private boat

Heron Island



Heron is an internationally renowned dive location, with 22 dive sites and night time dives



Heron Island Resort – resort accommodation and dining facilities with spa and marine centre. No day trippers. ACCESS: boat launch or helicopter transfer ex. Gladstone



Heron Island
NATURE'S WONDERLAND
GREAT BARRIER REEF

Wilson Island



Small coral cay near Heron Is. with white beaches and clear waters.



Part of Heron Island Resort, designer tent accommodation. Max 12 guests. ACCESS: short boat ride from Heron



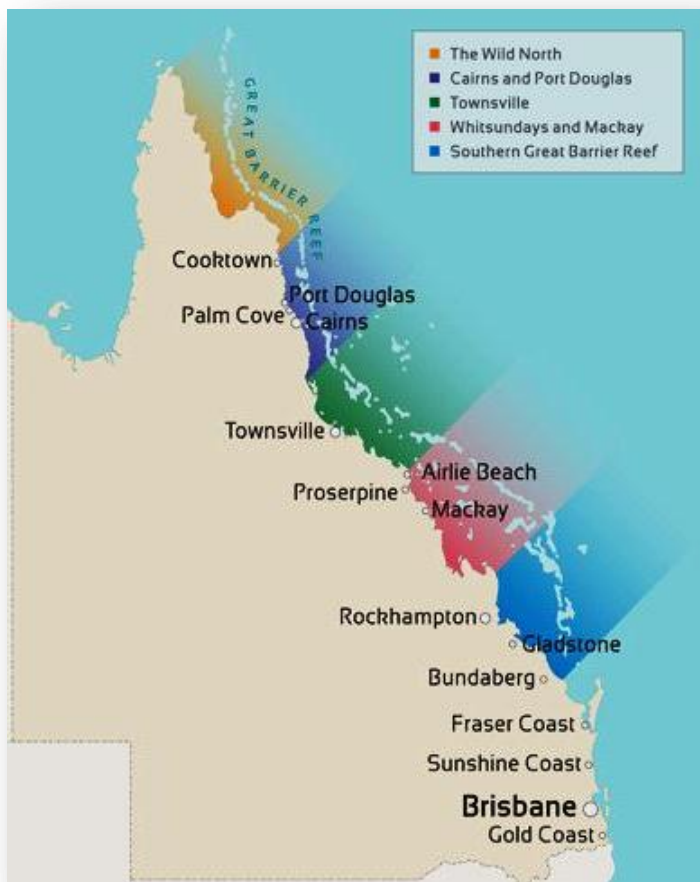
<p>Great Keppel Island</p> 	<p>Continental island with 17 pristine beaches and clear waters, within 15km of the coast and via short boat ride, with many excellent dive sites located nearby (see below)</p>	<p>GKI Holiday Village – Tents, cabins, dorms. Svendsen's Beach has secluded luxury tents and the island has self-contained houses such as Keppel Lodge. Keppel Bay Dive is now focussed on research diving, rather than visitor diving.</p> <p>ACCESS: Freedom Fast Cats service ex. Keppel Bay Marina (Roslyn Bay, south of Yeppoon).</p>
<p>Keppel Bay Islands + Dive Sites</p> 	<p>North Keppel, Humpy, Conical, Middle and Miall Islands.</p> <p>Diving sites include Outer Rock, Man & Wife Rocks, Barren & Child Islands and Egg Rock. Egg Rock has been described as 'Australia's best kept secret', with world class diving.¹⁸</p>	<p>ACCESS: Cap Reef Cruises (charter dive boat, "MV Adori") and Sail Capricornia "Grace" ex. Keppel Bay Marina</p>
<p>Shipwrecks</p> 	<p>Many shipwrecks are identified for diving, with the main tourist operation access being the Karma. Others at deeper waters include the Cetacea, Barcoola and "The White Ghost" (Shannon II).</p> <p>Please refer to Appendix for more SGBR shipwrecks.</p> 	<p>Accessed predominately from Bundaberg and Town of 1770.</p> <p>ACCESS includes Bundaberg Dive Charters "Dive-a-holic" through Bundaberg Aqua Scuba</p>
<p>The Swain Reefs</p> 	<p>Large reef area, more than 200km (a good day/night from mainland) in 'virgin territory', usually with excellent underwater visibility.</p>	<p>ACCESS: Cap Reef Cruises (charter dive boat, "MV Adori") ex. Keppel Bay Marina and Kanimbla Charters ex. Gladstone for scuba diving groups No regular access was identified, with most dive/fishing charters focusing on fishing.</p>
<p>External Charters</p>	<p>Several operators and charter boats have permits to operate in several locations on the SGBR.</p>	<p>Big Cat reality regularly offers trips ex Brisbane to Heron Is, Lamont, Fitzroy, Fairfax & Hoskins Reefs and Wreck of the "Karma" and weekends on Lady Elliot Island.</p>
<p>Retail/Online</p>	<p>Heron and Lady Elliot Island are featured in many retail, wholesale and online outlets, with Lady Musgrave Cruises and 1770 featured in some packages.</p>	<p>Always Diving and Snorkel Safari are dive retailers that feature SGBR. Most only featured GBR, which is dwarfed by world dive destinations. Underwater.com.au is an Australian dive site with some SGBR operators.</p>

There are very few operators that are solely dedicated to the dive market. During consultation and through online research, only three businesses were identified as being dedicated dive businesses.

A major issue for these dive and other dive related experiences was the difficulty in locating them online and in wider tourism destination information. Some had out of date or no websites, no e-mail addresses and difficult to find phone numbers.

In light of best practice examples and dive market insights, online and digital marketing is essential to compete in this market.

As the major dive locations and tourism operations in the SGBR are located on or near the islands and with a limited number of businesses dedicated solely to dive, it is recommended to promote the dive experience as part of the SGBR, particularly with the islands, as opposed to a purely dive market campaign.



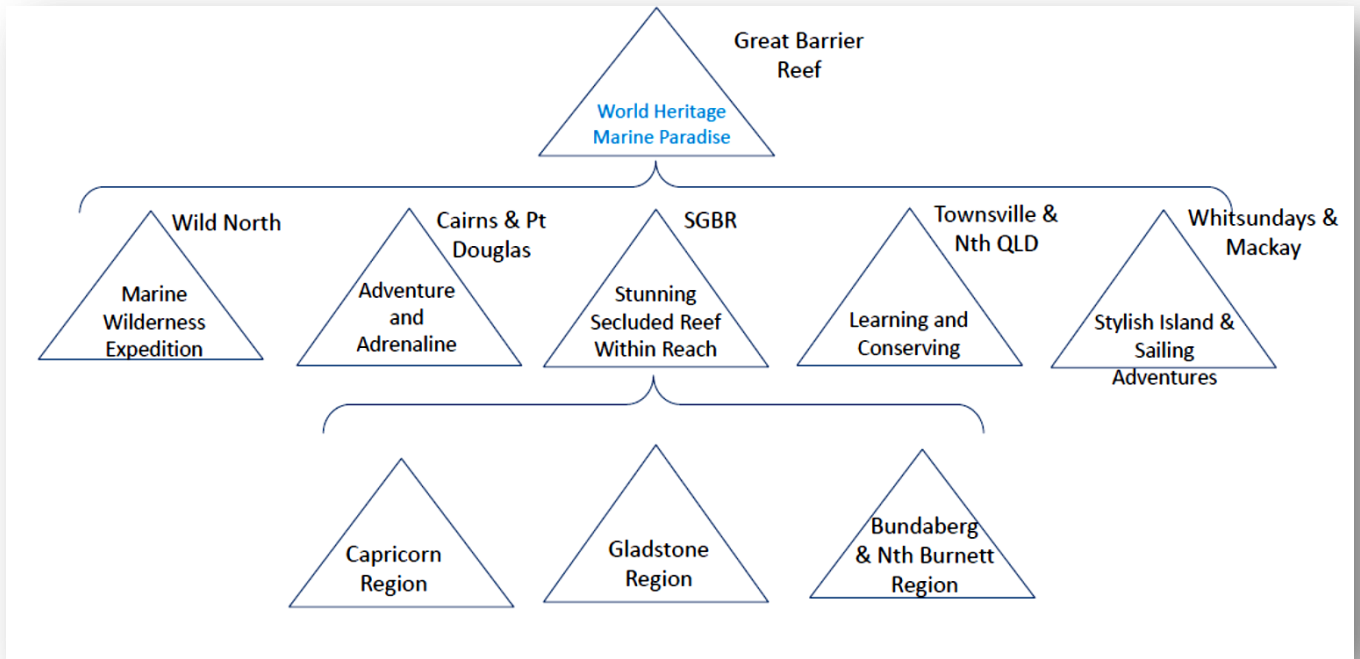
1.2 DIFFERENTIATION BETWEEN GREATER GBR

Tourism and Events Queensland (TEQ), in partnership with the Regional Tourism Organisations (RTOs) has undertaken extensive work to reinvigorate the Great Barrier Reef with A Great Barrier Reef Experiences Audit.

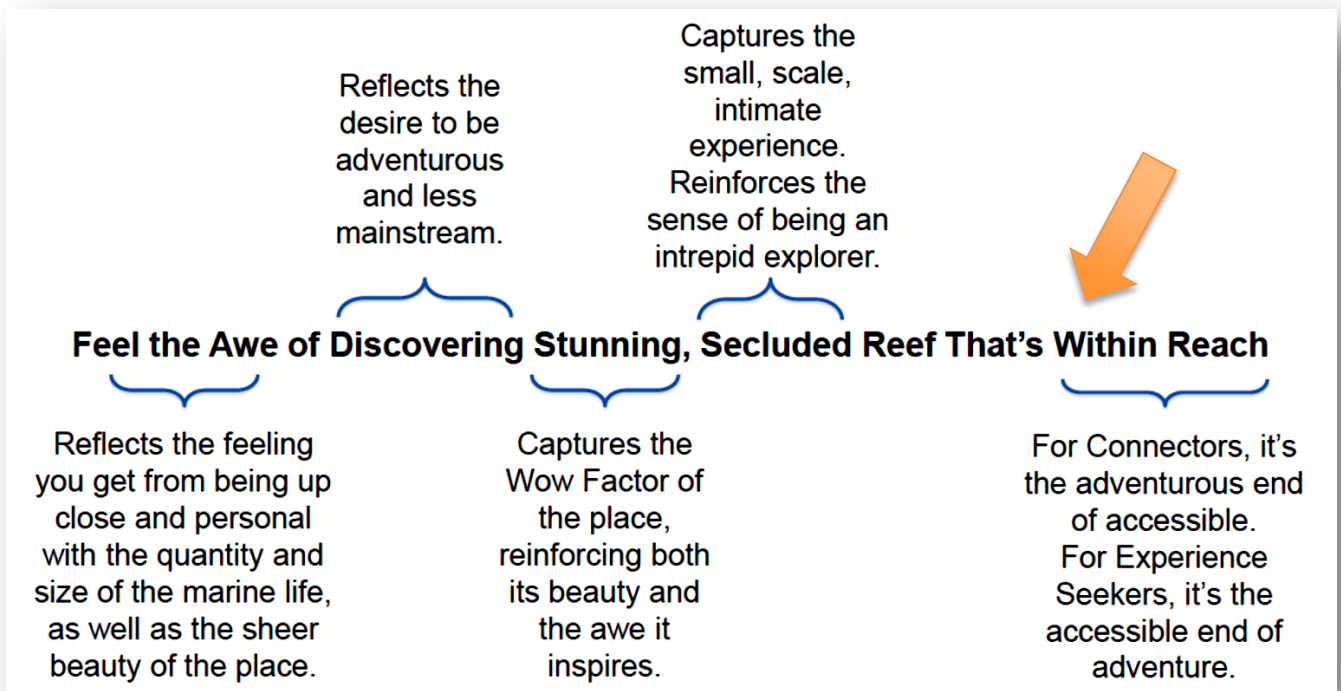
This has been undertaken with the RTOs in SGBR, including Bundaberg North Burnett Tourism, Gladstone Area Promotion and Development Ltd (GAPDL) and Capricorn Tourism. Identification of Hero Experiences for each region was undertaken.

A hierarchy of core promises, depicted in the diagram on the next page was developed for each destination.

GREAT BARRIER REEF HIERARCHY OF CORE PROMISES



Global Experience Seekers and Connectors were identified as key markets for the Southern Great Barrier Reef, with the core promise for the SGBR being **stunning secluded reef that's within reach**.



1.3 HERO EXPERIENCE & KEY MESSAGING

As part of the audit process, key messaging was developed for the SGBR to reflect:

- The accessible end of adventure is the overarching feel
- Offers a genuine 'Robinson Crusoe' feeling of intrepid adventure, but accessible enough that it can be done in combination with other destinations
- Reinforce the feeling of discovery and pristine, untouched authenticity
- Adventurous and secluded, but within easy reach of Queensland's capital, Brisbane and SE Qld
- Lasting memories, connecting with people and nature

The Feel for SGBR is **secluded, special and to be awed/wonder/wow factor**

The destination is **seen** as **Green/Eco-friendly/Nature lover. Well-travelled, less mainstream** where you can **snorkel off the beach, experience turtles/Mon Repos, see unique/large marine life and have small scale, personal experiences**. Year-round ocean swimming, clearer water/visibility are strong points.

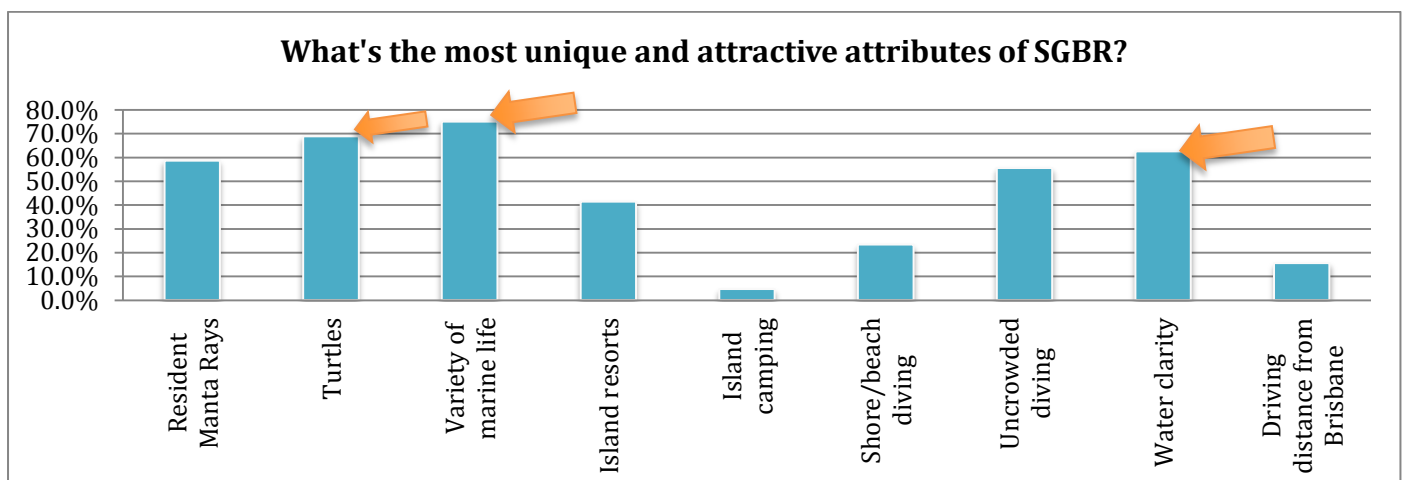
The personality of the SGBR is **friendly, down to earth, proud, enthusiastic and adventurous**.

During consultation, **unique selling points** for the destination were seen as:-

- Manta Rays – resident numbers and close encounter experience, particularly LEI
- Loggerhead Turtle Laying & Hatching – mainland at Mon Repos and islands, particularly Heron
- Coral Cay Island Resorts, Shore and Coastal Diving – as opposed to live-aboard dive holidays
- Robinson Crusoe style camping
- Water Clarity + Less Crowded

To get cut through in a competitive and crowded market, the hero experiences need to be kept simple and repeated. Just as the image of the Hammerhead Shark is synonymous with the Galapagos, it is recommended to promote a personal experience image/s of a Manta Ray and Loggerhead Turtle experience/s.

From the preliminary results of the SGBR Online Dive Survey, respondents were asked to identify the most unique and attractive attributes of the SGBR.



“The SGBR is child friendly”. Several industry and dive enthusiasts during consultation commented that the SGBR is one of the few places you can take a family and still experience great diving spots. It was seen as safe and child friendly.

2.1 INDUSTRY CONSULTATION OVERVIEW - COMMERCIAL REALITY

As identified in the introduction of Best Practice review many representatives consulted clearly identified the high Australian dollar as the major contributor to the downward trend in diving in Queensland, making diving holidays and diving certification cheaper offshore, particularly in SE Asia. Extreme weather, rising costs of fuel and maintenance associated with marine vessels and dive equipment required to operate were also seen as inhibitors for dive operator development.

The commercial reality of operating dive businesses was further exasperated by the fact that many divers visit a dive location or destination as part of their ‘bucket list’, so repeat business is limited.

“There are quite a lot of trophy divers out there. You have your list of must dives and it's a bit of tick and flick, off to the next destination” explained Dive Master, **Emanuel Wetterqvist**, Social Media Strategist at **Tourism and Events Queensland** and self-confessed scuba junkie.

“I used to operate dive and fishing charters, but the dive side of the business has really tapered off. My fishing clients are repeat visitors, often returning regularly and booking in advance” commented **Bruce Stobo**, **Kanimbla Charters**, Gladstone.

Tim Hochgrebe of **Underwater Australasia** in Byron Bay made specific reference to why many dive operations are no longer in operation *“I’ve seen the growth of other marine tourism operations, such as whale watching, snorkelling and kayaking tours. You don’t need as much equipment, and when the whales are here, our dive operators become whale watching vessels”.* And tongue in cheek he said *“This is a passion driven industry. If you want to make a \$1m in the dive industry, start with \$2m and you’ll end up with one”.*

Destination image influences dive business, explains **Mike Ball**, “The destination plays a big part in the success of a dive business. For years I tried operating out of Townsville and I’ve seen the dive industry try to develop along the coast. I’ve been through the doors of many travel agents and agents sell where the traffic is going. For every 10 people through their door, 8 were for Cairns. But the big thing crippling us is the high Aussie dollar and the weather.”

Dive Queensland chair, **Margie McKenzie** cited more co-operative marketing for the dive industry as a whole to collectively promote diving in Queensland as an opportunity and the distance to the outer reef being a major inhibitor for the SGBR.

Association of Marine Park Tourism Operators (AMPTO) chair, **Col McKenzie** identified access as a major contributor to the success of a dive destination. “It’s all about air access to compete in this market” said Col. “Other major factors contributing to the downturn is the Aussie dollar, but I believe its discounting that has really affected the Australian dive industry. As an example I used to charge \$395 for a learn to dive course in 1988, it’s now being offered for \$125. This cheapening of the dive experience has led to decreased visitor satisfaction so very few continue to dive”. For future development Col said “We really do need to collectively promote diving in Queensland and lift the profile”. These factors and others impacting the development of the industry are outlined in the following SWOT.

1.3 DIVE SWOT

The table below outlines the strengths, weaknesses, opportunities and threats of the SGBR identified throughout consultation.

STRENGTHS	WEAKNESSES
<p>Coral Cay Island Resorts with shore diving</p> <p>Reputation and distribution of Heron and Lady Elliot Islands</p> <p>Internationally recognised Manta Ray diving</p> <p>Loggerhead turtle laying and hatching accessible on mainland and islands</p> <p>Water clarity , coral and marine life variety</p> <p>Coastal shore diving at Bundaberg and 1770</p> <p>Robinson Crusoe style island camping</p> <p>Close mainland access to Great Keppel Island</p> <p>Air access to Lady Elliot Island, Great Keppel Island and helicopter to Heron Island</p> <p>Family friendly dive products</p> <p>Lesser known 'hidden secrets' of SGBR</p>	<p>Distance to reef from mainland (making commercial viability difficult with high fuel/vessel costs, and not attractive to visitor for travelling time)</p> <p>No direct international air access, limited air access to land destinations (most via Brisbane) and cost to some destinations (e.g. Gladstone)</p> <p>Distance between reef sites to develop a dive trail</p> <p>Limited number of dive operators and commercial viability of dive businesses</p> <p>Limited regular reef access and dive equipment</p> <p>Little or no cross regional marketing of SGBR dive products, experiences and sites</p> <p>Limited SGBR online, particularly for retail dive</p> <p>Outside resorts, little networking of dive products and experiences with greater tourism offering and regional tourism organisation network</p>
OPPORTUNITIES	THREATS
<p>Great Keppel Island Resort development to offer a large enough island accommodation base for a full-time dive operation around Keppels.</p> <p>Develop alternative dive experiences, closer to coast, to reduce tour operating costs, visitor travel time & alternative for GBR day trips if sea is too rough</p> <p>Resources boom – potential growth in regional Queensland drive market</p> <p>Co-operative and cross promotion of product, through a trail or dive passport</p> <p>Dive festivals and special interest events, such as underwater photography</p> <p>Packaging and promotion of complimentary experiences e.g. snorkelling, reef surfing,</p> <p>Reef day trip ex. Bundaberg's proximity to growing SEQld, and international access from Brisbane</p>	<p>Extreme Weather – cyclones/floods</p> <p>High Australian dollar</p> <p>Competition from international dive destinations, particularly SE Asia</p> <p>Coral bleaching/rising water temperatures</p> <p>Cost of Australian labour. The ratio of staff per dive visitor is significantly higher offshore, usually resulting in higher service levels.</p> <p>Resources boom – many charter boats and personnel are now servicing the resource sector and no longer operating in tourism. Room rates and availability, particularly in Gladstone limit use for the leisure market. Destination image of pristine, eco destination could be affected.</p>

4.0 DEVELOPMENT OPPORTUNITIES

As detailed in the SWOT, there are many opportunities to further enhance the SGBR dive experience. The opportunities outlined in this section of the report specifically address:-

- Improving access and commercial viability
- Offering new dive experiences
- Increasing length of spend and stay through dispersal
- Improve packaging and distribution
- Increasing repeat visitation

Potential funding and resources are identified for each project as a preliminary review.

NEW DIVE EXPERIENCES

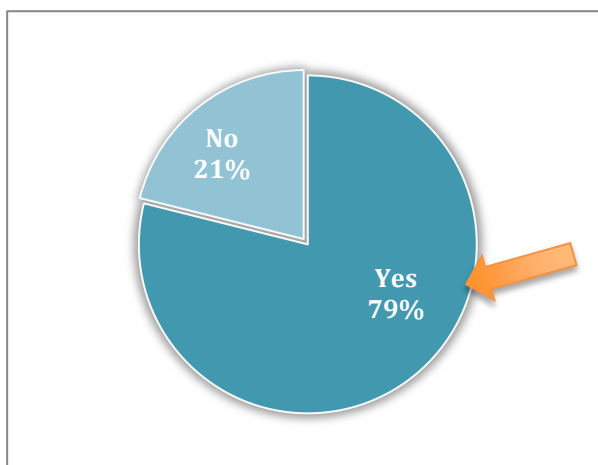
In light of the strong Australian dollar, the distance to the SGBR from the mainland and rising operating costs, it is recommended to look at developing diving and snorkelling opportunities closer to shore, specifically to **improve access** and **commercial viability**.

In the short term, the development of a new dive experience/s closer to the coast could assist in offering tourism operators alternative sites to operate during rough seas.

In the long-term, this could alleviate pressures on the Southern Great Barrier Reef with the growing population base of South East Queensland and cater for more mass tourism, particularly with the predicted growth of Chinese and Indian markets.

The development of artificial reefs has a long history in Australia¹⁵. A recently example is the dive development off Queensland's Sunshine Coast that involved the sinking of the ex HMAS Brisbane.

As part of the online dive survey for this project, respondents were asked if they had dived an artificial reef and more specifically, would they be interested in diving on an artificial reef near the Great Barrier Reef if it was closer to shore and cheaper to access?



From the interim results of 200 respondents, 35% had dived on an artificial reef with 79% stating yes, they would be interested in diving on an artificial reef.

The respondents who would not dive an artificial reef stated they were more interested in natural attractions. One respondent was dubious as to whether such a reef development would be for the diving market or fishing.

Preliminary results, online SGBR Dive Survey 2013



HISTORIC SHIPS

A new dive and snorkelling experience could be created by developing an artificial reef and possible conservation park such as the HMAS Brisbane off the Sunshine Coast.

According to the Queensland Environmental Protection Agency, within a year, the site was offering excellent opportunities for viewing marine life and covered in hard and soft coral¹³.

Detailed surveys would need to be undertaken to select a site with good water clarity, bare sandy bottom and no extreme currents. An example of a shallow wreck is depicted above from Fathom Five National Marine Park, Ontario, Canada. A shallow dive site could be developed to also cater for snorkelling. The most well-known historic ship wreck on the GBR is the Yongala near Townsville. Other destinations, such as the Gold Coast have investigated a Dive Attraction, including a Scoping Paper with EC3¹⁴ for the pre-feasibility of an artificial reef.

During consultation, Gladstone was cited as a possible site. This could build on the city being the access point for Heron Island, adding an additional attraction for diving Heron. It could also offer a recreational opportunity for the growing number of workers. Such an attraction, close to shore could also offer FIFO (Fly-in Fly out) workers an opportunity to participate on short breaks.

During consultation, the ex HMAS Gladstone was identified as a possible ship that naturally

ties to the destination. The ship was decommissioned in 2007, handed to the City of Gladstone and placed in the care of the Gladstone Maritime History Society Inc., the operators of the Gladstone Maritime Museum.

Gladstone Port Corporation has allocated a site in the "East Shores Precinct" for HMAS Gladstone to be set up as a land based display. At this site, inspection of the vessel by the public would be regularly available. As such, significant community consultation would be required for the ship to be developed for this type of attraction.

A similar vessel of historic value could be sited within the SGBR destination.

POSSIBLE FUNDING + SUPPORT RESOURCES

Contestable Funding, Tourism & Events Queensland,

Community Funds, Resource Sector Companies

Regional Development Australia for large cross regional effect projects

Regional Development Australia Fund, Dept. of Regional Australia, Local Government, Arts & Sport

Historic Shipwrecks Program, Dept. of Sustainability, Environment, Water, Population & Communities.



UNDERWATER SCULPTURE

In several locations worldwide, including South America, Scotland and Greece, underwater sculpture has been developed for aesthetic and environmental reasons.

Sculptures are developed to reflect the local natural environment and cultural heritage.



Canterbury



Mexico

Underwater sculpture could be developed using best practice, environmentally sustainable materials. It would need to be developed to tastefully reflect the local environment, cultural and indigenous heritage of the SGBR region.

It could also be developed close to shore, in differentiated water depths to suit both divers and snorkelers.

To assist with commercial viability, this type of water based attraction could be offered as an alternative site for reef day trip operators during rough weather and alleviate long term pressures on the Great Barrier Reef to cater for mass markets and growing population

A series of coastal underwater sculptures could also be developed to link the mainland of the SGBR allowing for a coastal shore snorkel and dive trail. Each site could be designed specifically to reflect local heritage and attract different coral and marine species. Depending on the local heritage, sculptures of legendary vessels that traversed the Coral Sea could be developed.

Molinere Bay, Grenada in the Caribbean is a good example of the use of underwater sculpture following damage from severe cyclones.



On 7 September 2004, Hurricane Ivan struck Grenada directly inflicting damage to over 85% of the structures on the island. It was then subsequently hit by Hurricane Emily in July 2005.

Moiliniere Bay suffered considerable storm damage in recent years and the placement of an artificial structure has provided a new base for marine life to proliferate. It is now home to sixty-five sculptures, covering an area of 800sq metres. The sculptures were also designed to create a diversion from other areas of coral reef currently endangered by overuse from water activities.

POSSIBLE FUNDING + SUPPORT RESOURCES

Tourism, Infrastructure and Regional Development Fund (TIRF) and T-QUAL grants, Department of

Resources, Energy and Tourism – dollar for dollar funding to regional tourism projects.

Arts Queensland, funding programs for artists, creative communities and regional arts development fund (RADF)

Australia Council for the Arts, arts funding and advisory body delivering \$160m across the arts in Australia, including programs such as Market development and Community Partnerships





REEF DAY TRIP EX BUNDABERG

Bundaberg offers a potential mainland access point within reasonable travel distance of a large, growing population base and international airport in Brisbane.

In previous years, Lady Musgrave Island has been a popular day trip destination for visitors to the Bundaberg region, with day trips being operated until approximately seven years ago. Visitors were able to snorkel and dive into the Lady Musgrave Lagoon and fringing reef which boasts a wide range of coral, fish and turtles.

Bundaberg North Burnett Tourism has previously commissioned The Stafford Group to undertake a feasibility assessment to inform the reintroduction of a chartered day service to the Island from Bundaberg¹².

The report includes key factors that need to be taken into consideration for such an operation to be viable, including

- Approval by National Parks for allowing a second operator to access the Island including allowing up to 50 passengers at any one time to go ashore as part of the permit
- The size and type of vessel to allow for the numbers and conditions e.g. large 30m wave piercing vessel with duckboard attached to alleviate the need for a pontoon.

Most significantly, with the correct vessel and approvals, total travel time would allow the packaging of a GBR tour ex. Brisbane with air

access for Chinese and Indian markets. Virgin Australia has just commenced services to Bundaberg, offering competitive fares for the leisure market.

To make such a product sustainable and not to compete with other operators and Queensland destinations offering similar products, it is recommended to develop the product around the unique destination offerings of the SGBR, for example Mon Repos, turtles and shore diving.



Further investigations into alternative vessels for sites such as the hovercraft used by Broome Hovercraft Eco Adventure Tours in Western Australia, Ocean Rafting in the Whitsundays and even the concept of a new passenger flying hovercraft (recently featured on MaldiveTimes.com) could be investigated for sites closer to shore and possible SGBR island to island connections in the future.

POSSIBLE FUNDING + SUPPORT RESOURCES

Tourism, Infrastructure and Regional Development Fund (TIRF)

Ausindustry

Austrade





GREEN + ECO ACCREDITATION

Through GBR Experiences Audit, the Southern Great Barrier Reef's Global Experience Seeker was seen as:

Green/Eco-friendly/Nature lover Adventurous Well-travelled, less mainstream

An important finding from the preliminary online survey is the importance divers place on the natural environment and a certified operator.

A certified dive tour operator was identified as one of the most important factors in determining a destination and a dive site.

With these in mind, eco and T-QUAL accreditation are highly recommended for dive operators and other tourism businesses wishing to attract a dive and snorkelling market.

By encouraging as many operators as possible to be eco certified, the SGBR could aim to be an eco certified destination, and contribute towards long-term sustainability.

Several certification programs exist and can be located at
<http://www.ecotourism.org.au/roc.asp>

To further encourage eco accreditation and sustainable practices, operators and the SGBR destination could lift their profile through Ecotourism Australia's annual GECKO Awards and the Queensland and Australian Tourism Awards in categories such as the Steve Irwin Award for Ecotourism and the Qantas Award for Excellence in Sustainable Tourism. Profiling

with best practice case examples at tourism and ecotourism conferences could also lift the SGBR's positioning as eco- friendly and environmentally significant.

ECO VOLUNTOURISM

From the preliminary findings, nearly 80% of those surveyed agreed the following statement was **important or very important**:-

"I like a holiday where I'm contributing to conserve the environment".

Businesses and their staff are encouraged to participate in the GBRMPA's Eye on the Reef Monitoring Program and sightings network, and where possible, integrate the activity into the visitor's experience, so they too can participate in and be part of 'Reef Watch'. These initiatives and more can be found at

http://www.queenslandholidays.com.au/experiences/great-barrier-reef/the-worlds-best-managed-reef/the-worlds-best-managed-reef_home.cfm

Promoting responsible reef practices in all aspects of tourism, whether operating directly on the reef or accommodation on the mainland should be promoted.

The SGBR has several research facilities and locations which could be included in tourism literature and online content for visitors to participate in 'voluntourism' on the reef

30 DAYS
100 EVENTS
1,000 DIVE SITES
10,000 DIVERS
\$100,000
1 MILLION
REASONS TO JOIN



DIVE EVENTS + SPECIAL INTEREST

To build repeat visitation and develop new, special interest markets, it is recommended to further enhance the existing dive events, festivals and calenders.

Heron Island's Dive Festival and program could be developed with possible 'fringe' festival activities across the region.

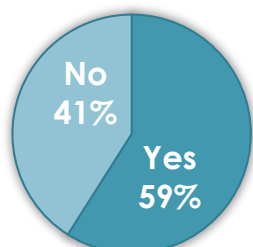
Events such as the "Reef Live" event being promoted for the Great Barrier Reef on World Oceans Day could possibly be developed to enhance the Dive Festival offerings. Other underwater arts activities, such as underwater fashion parades, photo shoots and sand sculptures could be incorporated.

A dive calender such as **SGBR "What's On Underwater"** with turtle season, whale season, coral spawning, best time for water clarity, night diving and other dive related events and festivals could be promoted.

Each 'event' and natural encounters with dates could be added to online calenders (e.g. Event Finder, Courier Mail online calender, ATDW, Brisbane for Kids).

In the online dive survey, interim results show

Do you dive with a Camera?



that nearly 60% of divers dive with a camera. *Preliminary results, online SGBR Dive Survey 2013*

The growing use of diving with cameras and social media

could assist furthering the destination image of the SGBR through diving events, such as The Underwater Festival which is essentially an underwater photography competition for the Australasia.



<http://festival.underwater.com.au/>

Lady Elliot Island offers a photo frenzy workshop and shootout with wildlife and underwater photographer, Darren Jew.

Development of these types of special interest workshops and events could add a new dimension for the SGBR Destination image, encourage repeat visitation to the destination and develop new, special interest markets.

POSSIBLE FUNDING + SUPPORT RESOURCES

Festivals Australia, Federal government funding, and **Regional Events Program**, Tourism & Events Queensland

2 for 1 Dive Offer
with
Jean-Michel Cousteau Diving
and **Daku Resort**

\$550 *
PER COUPLE
PER WEEK

Includes:
Accommodation for two
5 x 2 Tank dives over the week
or Padi Diver Qualifications

* Price is FJD\$1980 + taxes, which is equivalent to approximately USD/AUD\$550.

PACKAGING + DISTRIBUTION

Apart from Heron, Lady Musgrave and Lady Elliot Island, there are few dive/snorkelling related products or SGBR destination information in dive media.

Within the region itself, there is little dive information in greater tourism marketing. It's also important to note the small number of operators in the dive market are not well networked or known to the greater tourism networks. This includes accommodation providers, other tourism attractions and visitor information centres.

It is not easy to locate or find information about the operators, including Google searching. Very few have updated websites, some with no e-mail and difficult to find phone numbers.

With increasing competition from SE Asia, the importance of raising the destination's profile and its dive and water related products in a simple and easily accessed way, is more important than ever.

Fiji offers some very competitive products in the market place for dive, and has recently developed 'snorkeling weeks' for non-divers and partners of divers.

The Philippines has launched **'it's more fun in the Philippines'** with very affordable flights ex. Sydney, a Google adwords campaign and good coverage online in dive travel networks (please refer Appendix for examples).

Another dive resort in Indonesia, **Wakatobi**, is currently advertising online in dive networks with some very impressive descriptions, images and an e-brochure (refer Appendix).

PROMOTING MORE THAN DIVE

As there are limited dedicated dive operations, it is recommended to also include other water related attractions and experiences with the dive experience. This will allow for the targeting of a wider audience.

The packaging and promotion of islands, dive, snorkelling and other complimentary experiences such as kayaking, sand boarding, learn to surf, learn to sail and other water related activities. The variety of accommodation at Bargara, Agnes Water/Town of 1770 and the Capricorn Coast could also be marketed collectively under the Dive and Snorkel SGBR banner.

From a visitor perspective, to ensure the maximum number of businesses and experiences are included and to encourage diving operators to network more closely with the wider tourism industry, it is recommended not to just feature RTO members, but to include all businesses and give significant 'value add' features to RTO members.

FLY, DRIVE + DIVE ITINERARIES

A series of packages and recommended itineraries to suit different markets could be developed, including 1 day, weekend, 3-5 day and extended stays. For example, during consultation, the SGBR was identified as one of the few places families could dive with children. The abundance of self-contained style accommodation in Bargara, Agnes Water/Town of 1770 and the Capricorn Coast further lends itself to this market, as does Turtle Season and the Mon Repos experience.

The increase in services from Virgin Australia to Bundaberg presents opportunities to develop Fly, Drive + Dive packages for the leisure market.

Learning to dive with other adventure activities to appeal to a male audience could also be incorporated for the regional FIFO market.

DISTRIBUTION STRATEGY

Once trails, itineraries and packages are developed, they could be incorporated into the wider SGBR destination marketing campaigns with an additional distribution strategy including:-

- PROMOTIONS - including Dive and

The FIFO (fly in-fly out) market was identified throughout consultation as a possible market. It should be noted that while this market may seem to be 'cashed-up' they are FIFO and often want to get straight back home on days off and save their earnings. Working closely with each location and their recreation offices is recommended. Some products, including learn to dive centres cited growth in this market with groups of single males.

consumer travel shows

- MEDIA & PR – increase SGBR content in dive media, including online, magazine, television, media famils and presentations at dive conferences
- SALES & DISTRIBUTION – with price leader packages through dive retailers, travel agents and trade famils
- ADVOCACY – encouraging divers and visitors to share information through their social networks

Where possible it is recommended to work with the marketing teams of major industry already marketing the region, including transport (air, rail, car hire), Heron Island Resort, Lady Elliot Island Eco Resort , Great Keppel Island Resort (when completed) and dive shops to help spread the destination message.

It should be noted there are no existing budgets by Tourism & Events Queensland to undertake a dedicated SGBR dive campaign.

Encouraging divers to use their own social networks should be an integral part of the strategy, including further development of WIFI locations on and near the reef

Encouraging the distribution of SGBR content and e-guide on third party websites could be encouraged by creating a SGBR web tile, images, maps, itineraries and content specifically for online.

The formation of a Dive industry cluster could help accelerate co-operative marketing and distribution of SGBR dive content.



Island trail example from the Mediterranean

SGBR ISLAND + DIVE TRAIL

During research for this project it was difficult to locate SGBR products and information easily online.

The information available was often not linked with the greater destination i.e. with accommodation options, how to get there and the on-selling of other dive sites, products and experiences.

To offer a holiday experience that can be promoted under the destination of Southern Great Barrier Reef (SGBR), the promotion of an Island and Dive Trail is recommended.

This would allow for the promotion of existing island dive trails, the promotion of snorkelling and diving experiences for 'non-certified' divers and linking via road and air connections. An island/mainland trail example is depicted in the image at the top of this page.

More island, diving and snorkelling events and products could be added to the trail as they become available.

The SGBR itself is not a natural dive trail of sites and there is currently no way to easily connect the access between them. For example, the natural geography would be to start at Lady Elliot Island then onto Lady Musgrave, Heron and Great Keppel Island and Keppel group.

The development of a dive passport was cited during consultation as a possible way to link the product offerings available and encourage

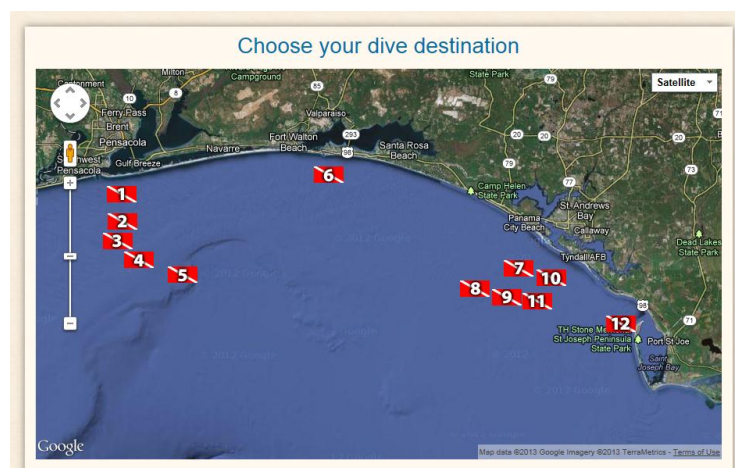
cross-promotion and increased visitor length-of-stay. Such as concept would work well as a SGBR Island + Dive Passport.

A good example of a trail development and cross promotion of products is the Florida Panhandle Shipwreck Trail.

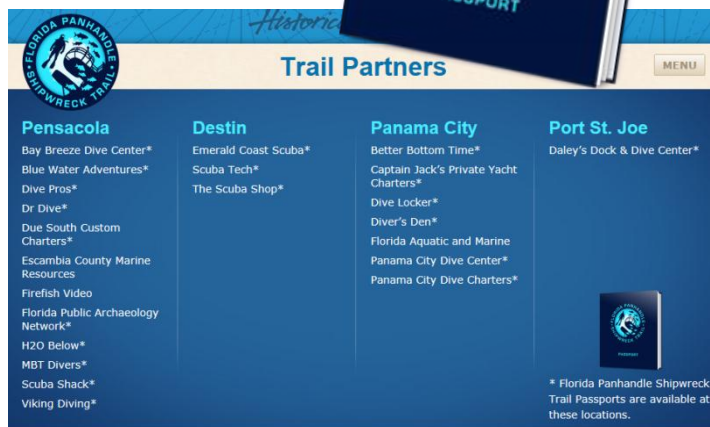
<http://www.floridapanhandledivetrail.com/>



The trail is a series of twelve shipwrecks in the Gulf of Mexico. Visitors are encouraged to start their travels along the trail at any of the twelve



destinations and upon completion of each dive, have their Passport validated with a signature and sticker.



The hard copy passport has a QR Code that allows access to the trail website. Trail passports are available from several dive shops and charter boats in the area.

Although the SGBR sites are not as closely geographically located as those in this shipwreck trail, a SGBR Island and Dive Trail could be replicated in a similar fashion with island and mainland products, including accommodation, transfers and events.

Each site could be promoted and identifying what's unique and special with access details.

Other related soft adventure activities currently available could be included, such as:

- Learn to surf
- Learn to sail
- Kayaking/canoeing
- Reef surfing
- Sand boarding

FUNDING + SUPPORT

There are several government and philanthropy sources of support and funding that could be utilised to further develop concepts for the opportunities presented in this discussion paper.

In the long-term, new dive related products, such as an underwater sculpture trail or dive art trail could be included.

E-BROCHURE

To initially tackle the limited information online, the e-brochure being developed for the SGBR could link the experiences and products through such a trail.

Existing maps and products, such as the Lady Elliot dive map would be easily integrated <http://www.ladyelliot.com.au/location/diveMap.asp>

To encourage repeat visitation, investigation into promotions to encourage repeat visitation could be undertaken. For example the trail could be part of a frequent flyer program, or develop a frequent divers program, where the more times you come, the more incentives or frequent flyer/diver points you earn.

An adoption program of resident and migrating marine life could be undertaken to raise funds for wildlife, which may in turn encourage visitors to come back to try and site their adopted animal.

POSSIBLE FUNDING + SUPPORT RESOURCES

Tourism, Infrastructure and Regional Development Fund (TIRF) and T-QUAL grants, Department of Resources, Energy and Tourism – dollar for dollar funding to regional tourism projects.

Contestable Funding for Regional Tourism Organisations, Tourism & Events Queensland,

Although by no means an exhaustive list, below are some resources that may be of assistance. Below are some that may be of assistance.

Tourism, Infrastructure and Regional Development Fund (TIRF) and T-QUAL grants, Department of Resources, Energy and Tourism – dollar for dollar funding to regional tourism projects.

<http://www.ret.gov.au/tourism/business/tirf/Pages/index.aspx>

Regional Events Program and **Contestable Funding** for Regional Tourism Organisations, Tourism & Events Queensland, <http://www.eventsqld.com.au/eq-regional-development-program>

Historic Shipwrecks Program, Australian Department of Sustainability, Environment, Water, Population and Communities www.environment.gov.au

Resource Sector – many resource sector companies have annual community funds which could be accesses for projects benefiting local communities e.g. Rio Tinto, QGC

<http://www.hereforgladstone.com.au/community-fund/>

<http://www.qgc.com.au/community/qgc-sustainable-communities-fund.aspx>

Caring for our Country, National Resource Management funding programs for national and cultural environment, including Sustainable Environment and Reef Rescue

<http://www.nrm.gov.au/funding/>

Regional Development Australia to assist with possible partners to further projects with cross regional effects.

<http://www.rdafcw.com.au/rockhampton>

<http://www.rdawidebayburnett.org.au/>

Regional Development Australia Fund, Department of Regional Australia, Local Government, Arts and Sport

<http://www.regional.gov.au/regional/programs/rdaf.aspx>

The Foundation for Rural & Regional Renewal (FRRR), partnerships between philanthropy, governments and business to stimulate rural and regional renewal in Australia

http://www.frrr.org.au/cb_pages/general_grants.php

Arts Queensland, funding programs for artists, creative communities and regional arts development fund (RADF)

<http://www.arts.qld.gov.au/funding/ind-dev-pres-grant.html>

Australia Council for the Arts, arts funding and advisory body delivering \$160m across the arts in Australia, including programs such as Market development and Community Partnerships

<http://www.australiacouncil.gov.au/grants>

Festivals Australia, Federal government funding for regional festivals and works related to festivals

<http://www.australiacouncil.gov.au/grants/2013/festivals-australia-15-march>

Ausindustry – possible assistance through Venture Capital programs if product is an innovative start up

<http://www.ausindustry.gov.au/programs/venture-capital/Pages/default.aspx>

Austrade – Export Market Development Grant to assist in claims for overseas marketing

<http://www.austrade.gov.au/assistance>

DIVE CLUSTER

In order to further the opportunities identified in this report, the formation of a dive cluster is recommended.

The purpose of this cluster could include:-

- Sharing industry trends and innovations
- Further identify funding and resources for development opportunities
- Assist with the distribution of Dive SGBR information
- Offer leadership and profile for diving in the SGBR

It is envisaged the cluster would meet on a needs basis and include representatives from GBRMPA, TEQ, RTOs, major industry within region (e.g. Heron and Lady Elliot Island), Dive Queensland and Dive Training organisations (e.g. PADI, SSI).

During consultation several representatives from the above organisations indicated a strong interest in being involved in such a group.

APPENDIX

RESEARCH & INFORMATION SOURCES

CONSULTATION & CONTRIBUTORS

PRELIMINARY DIVE SURVEY RESULTS

SHIPWRECKS OF SGBR

MARKETING & PACKAGING EXAMPLES

RESEARCH & INFORMATION SOURCES

¹ Tourism Queensland, 2007, **Recreational Dive and Snorkel Market**, Year End March 2007, Tourism and Events Queensland

² **Active Australia – The Numbers Game** (2000)

³ DEEMA - **Fast Facts: Recreational Scuba Diving and Snorkelling 2013**

⁴ **New Frontiers in Marine Tourism – Diving Experiences, Sustainability**, Management (Garrod and Gossling 2008)

⁵ **Outdoor Recreation Participation Report** 2010, US Outdoor Foundation

- ⁶ **PADI Worldwide Corporate Statistics 2013** Data for 2007-2012 Updated February 2013,
- ⁷ William Cline/Cline Group's **2011 Dive Retailer Financial Study**
- ⁸ Diversone.com, **Global Divers Survey 2011-2012**
- ⁹ Workplace Health And Safety (**Underwater Diving Work**) Compliance Standard 1996
- ¹⁰ **Great Barrier Reef Outlook Report 2009**, Great Barrier Reef Marine Park Authority
- ¹¹ **Extreme Weather and the Great Barrier Reef 2009**, Great Barrier Reef Marine Park Authority
- ¹² **Feasibility Study for Charter Day Access to Lady Musgrave Island ex Bundaberg**, August 2012, The Stafford Group
- ¹³ **The Brisbane Wreck to Reef – One Year On**, Qld Government, Environmental Protection Agency
- ¹⁴ **Gold Coast Dive Attraction – Scoping and Options Paper**, June 2010, EC3 and Gold Coast Tourism
- ¹⁵ **Artificial Reefs – Design and Monitoring Standards** (including draft guidelines) Australian Fisheries Research and Development Corporation, June 2011
- ¹⁶ **Scuba Divers Guide, Australia's Southern Great Barrier Reef**, Tom Byron, 1987
- ¹⁷ **Queensland & the Great Barrier Reef**, Lonely Planet Guide 6th edition, July 2011
- ¹⁸ **Dive Australia – a handbook for scuba divers**, Peter Stone. 5th edition 2012
- ¹⁹ **GBR Experience Audit Extraction, Hero Experience Fact Sheets, SGBR Key Messaging Summary Handout**, Tourism & Events Queensland 2012/13

CONSULTATION & CONTRIBUTORS

DESK TOP RESEARCH, DIVE ADVICE

Sandra Garvin, ex Dive Instructor & **Sandra Garvin Consulting**, Townsville

CONSULTATION

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Albie Stafford, **The Stafford Group**, Sydney

Amber Rogers and Isaac, **1770 Environmental Tours**, Town of 1770

Ben Southall, GBR diver, adventurer, **Best Job Ben**, Brisbane

Bruce Stobo, **Kanimbla Charters**, Gladstone

Cameron Bisley & Daniel Reeves, Economic Development, **Bundaberg Regional Council**

Chris Briggs, **Great Barrier Reef Marine Park Authority** (GBRMPA), Townsville

Clementine McBride, Marketing Manager, **Delaware North** (Heron Island)

Col McKenzie, **Australian Marine Park Tourism Operators Pty Ltd** (AMTPO)

Danny Dwyer, Sheridan Hatcher, **PADI Asia Pacific**

Emanuel Wetterqvist, Dive Master and **Tourism and Events Queensland**

Geoff Beyer, **Bundaberg Port Marina**

Glenn Churchill, Karen Sweeney, Kim Williams, **Gladstone Area Promotion Development Ltd** (GAPDL)

Jay Haein, **Haein Dive Academy**, Bundaberg

John Hallet, **Cap Reef Cruises** (Keppel Bay Marina)

Julian Negri, **Aqua Scuba**, Bundaberg

Julie Cook and Malcolm Mann, **GBRMPA**, Rockhampton

Justin, **Bundaberg Dive Charters** "Dive-aholic", Bundaberg

Karen Ronning, David Morgans and Maria Bartlett, **Tourism and Events Queensland**

Kylie Smith, **Keppel Bay Marina**

Margie McKenzie, **Dive Queensland**

Mark Olsen, **EC3 Global**

Mary Carroll, Krista Brown, Deanne Bowd, Ellie Traynor, Nathan White, Mindy Bambrick,

Capricorn Enterprise

Mike Ball, **Mike Ball Dive Expeditions**, Cairns

Peter Gash, Vicki Mullins, Sonya Mroz, Courtney Adamson, **Lady Elliot Island Eco Resort**

Rick Matkowski, Katherine Mergard and Kylie Lane, **Bundaberg North Burnett Tourism**

Rob Moore, **Lady Musgrave Cruises**, Town of 1770

Tim Hochgrebe, **Underwater Australasia**, Byron Bay

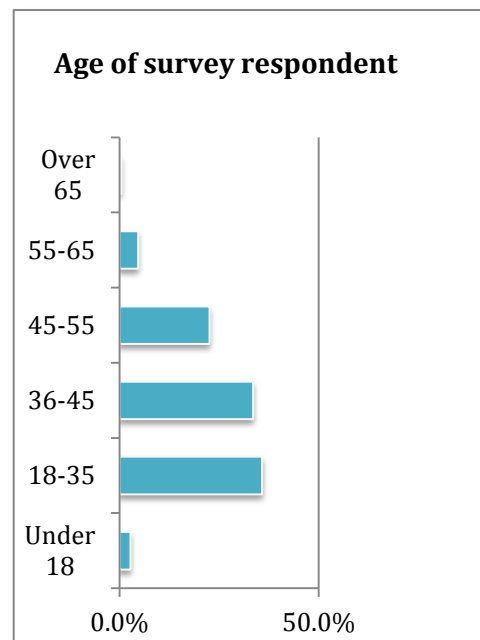
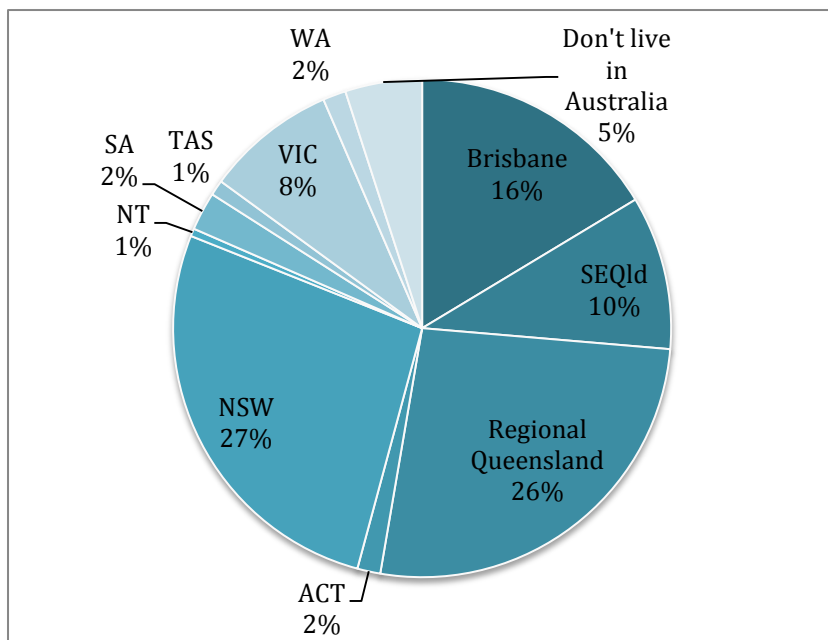
Vicki, **Sail Capricornia** "Grace" (Keppel Bay Marina)

PRELIMINARY DIVE SURVEY RESULTS

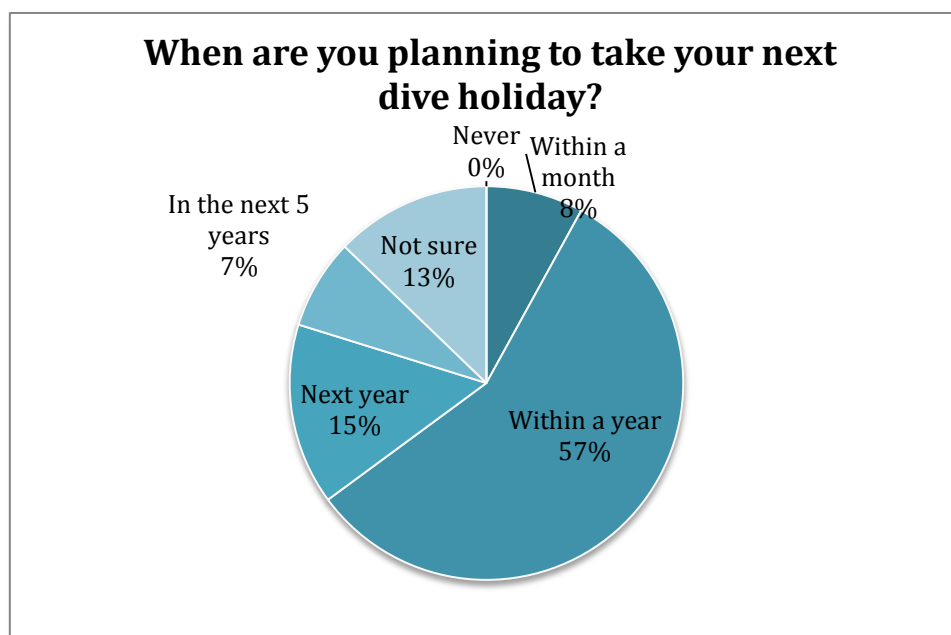
To further gain up-to-date dive market information, an online survey was undertaken as part of this report with final results due in June 2013. As at the 6th of May 2013, with a sample size of 215, interim results included:

Approximately 90% of respondents were Australian, with just over 50% being Queenslanders, most 18 – 45 years old (25% 45+).

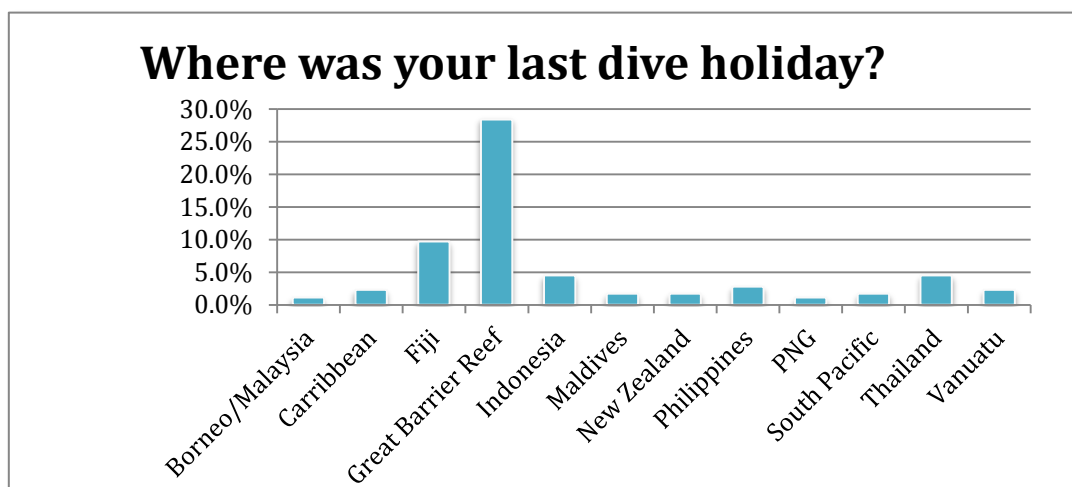
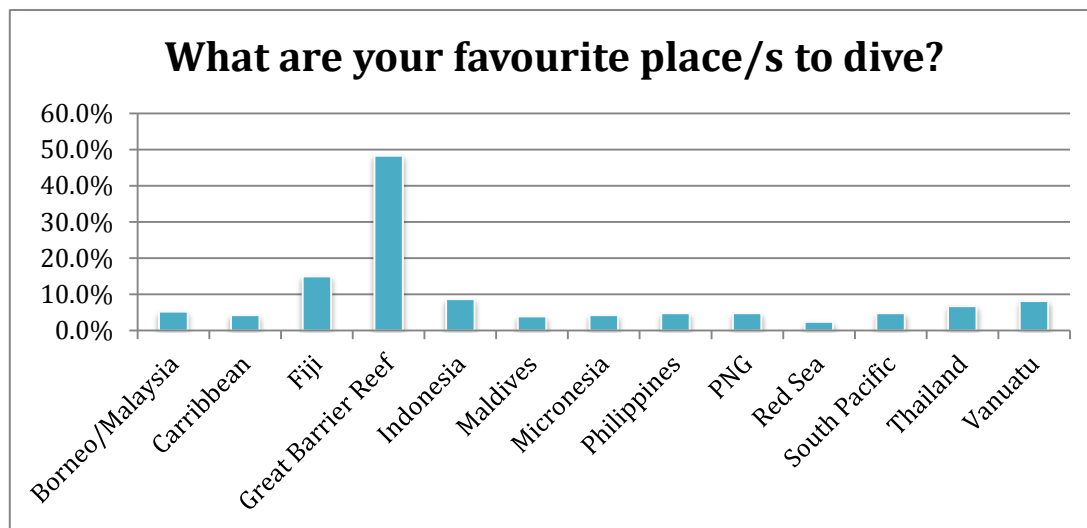
Source of survey respondents:-



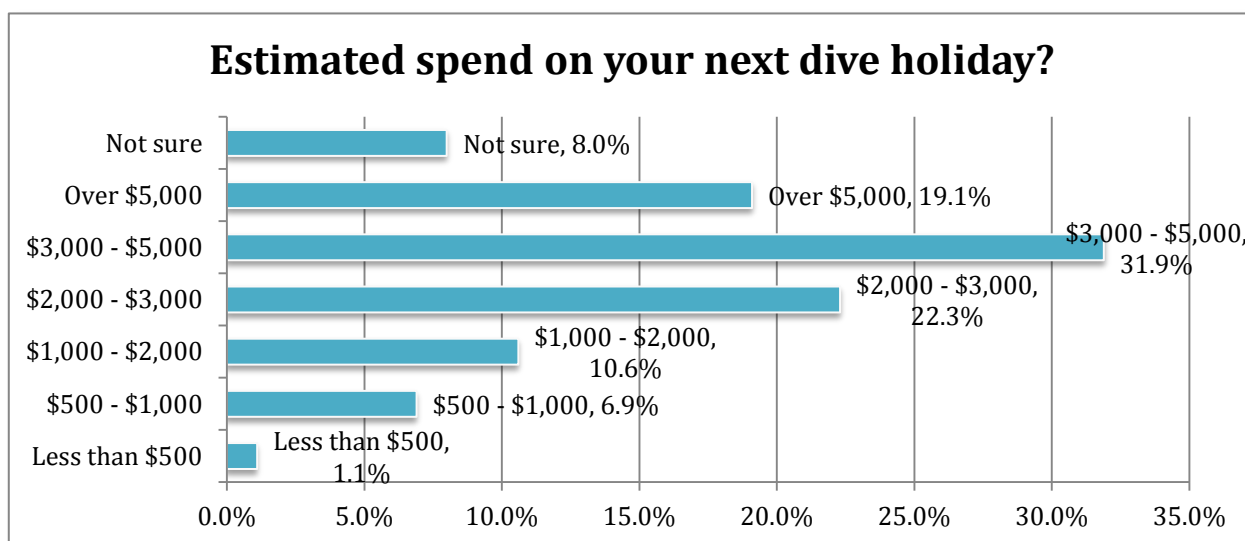
Nearly 60% of respondents were planning dive holiday within a year.



The Great Barrier Reef is a favourite dive location for Australians, however while nearly 50% rated it as a favourite place to dive, only 28% went there on their last dive holiday.

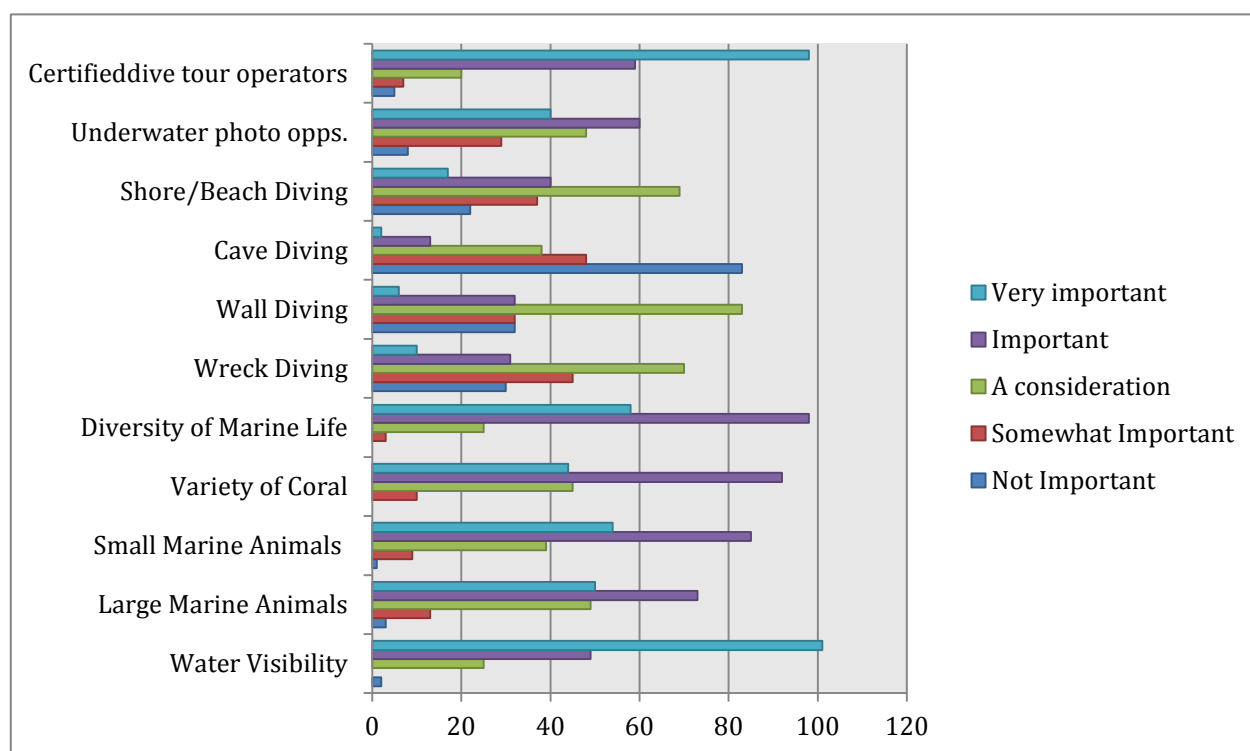


The respondents generally travelled as a couple (44%) or family (33%) with 30% spending over \$3,000 on their next dive holiday.

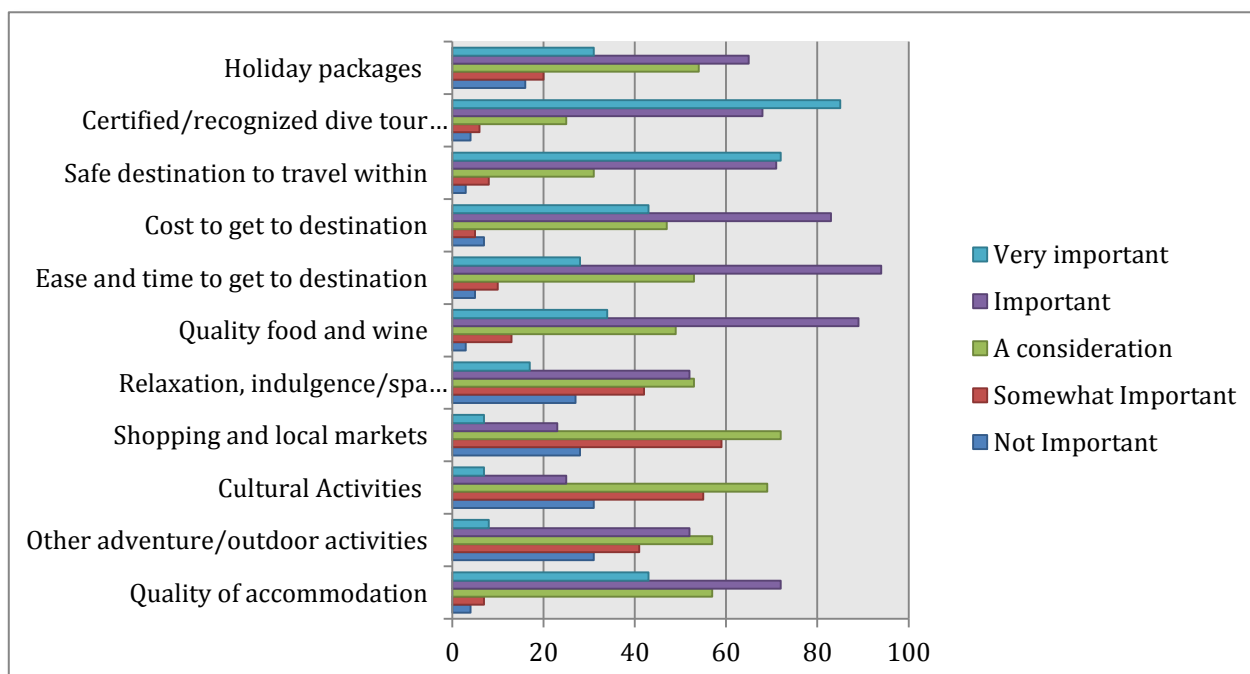


Water visibility was the number one factor cited as the most important factor for selecting a dive location, closely followed by **certified tour operator**. This was closely followed by diversity of marine life, coral, small marine and large marine animals.

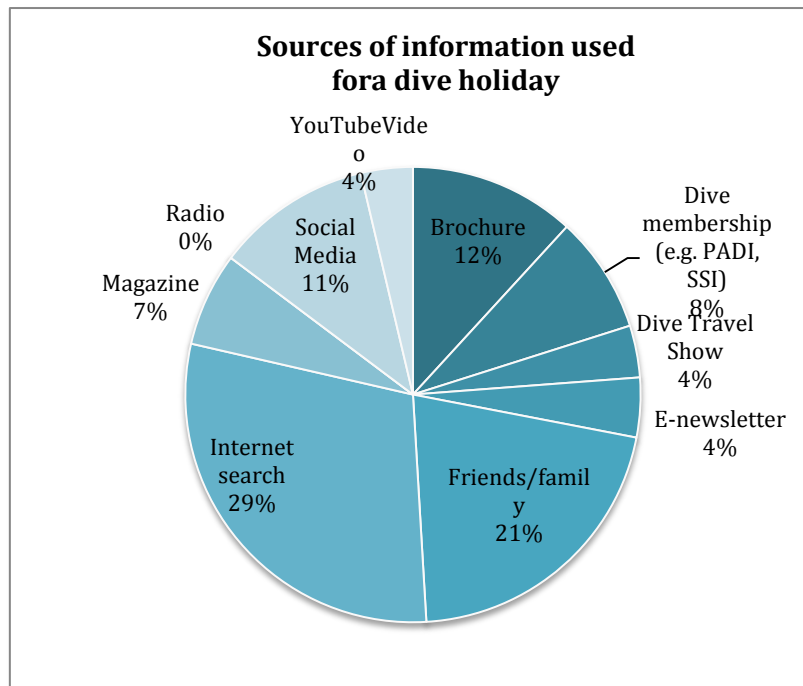
Factors Influencing A Dive Location



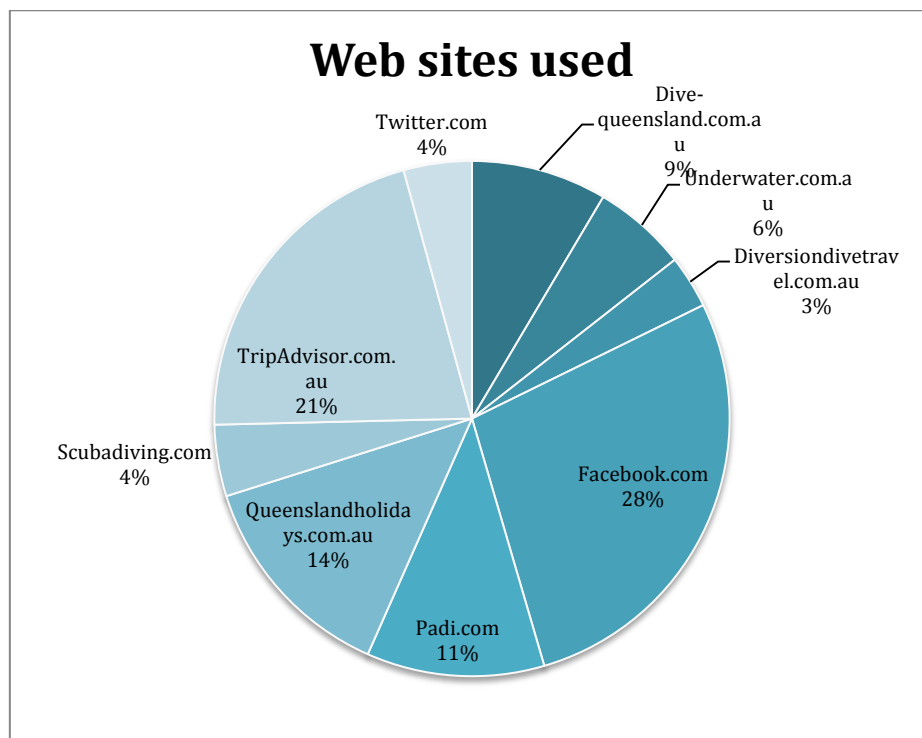
In addition to great diving, respondents were asked to select what else was important in their selection of a holiday destination. Certified dive tour operator again was the most important, followed by safe destination, cost and quality of accommodation. Ease and time to get to destination, quality food and wine and cost to get to destination were also important.



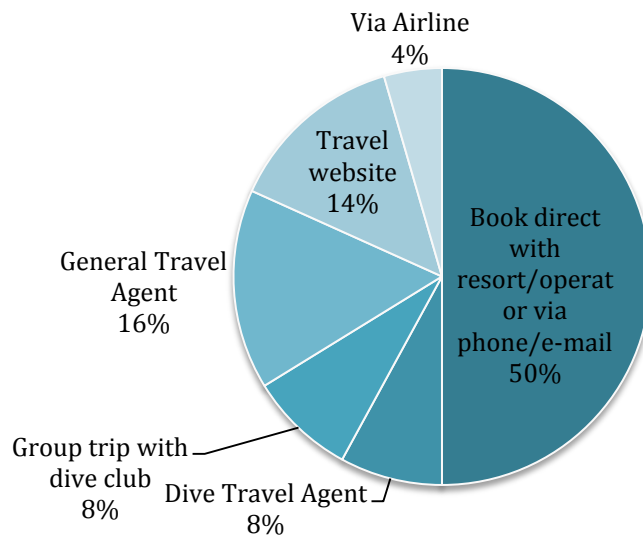
The internet played an important role for sourcing information for a dive holiday, followed by friends and family. Several stated their local dive shop and dive club as another sources of information.



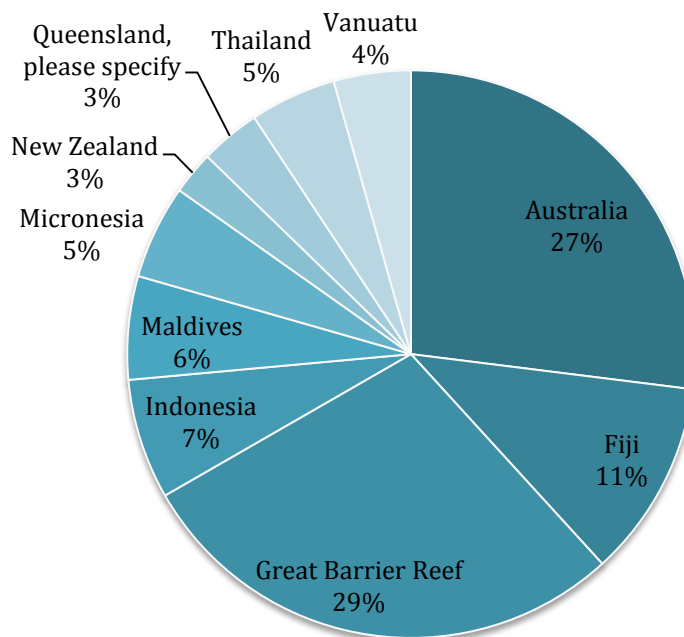
Facebook (66%) and Trip Advisor (50%) were the most commonly used websites, followed by Queensland Holidays (32%), Padi (27%), Dive Queensland (20%), Underwater.com.au (14%) and scubadiving.com (10%)



How do you book your dive holiday? Please select all that apply

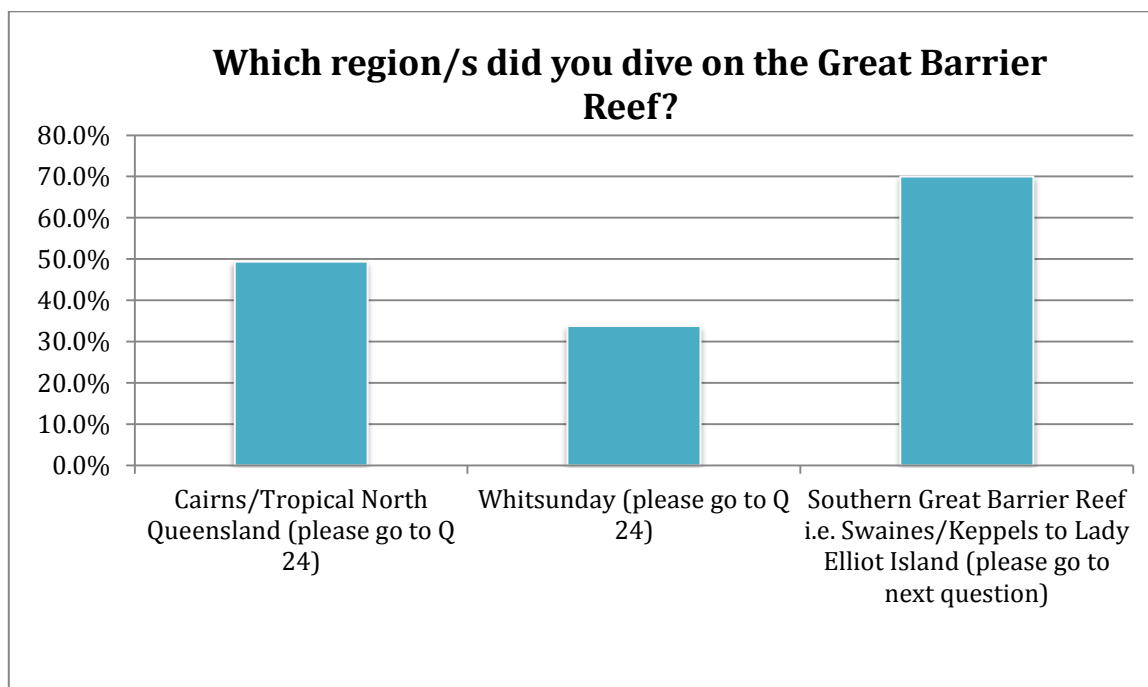


Where do you plan to travel for your next dive holiday?

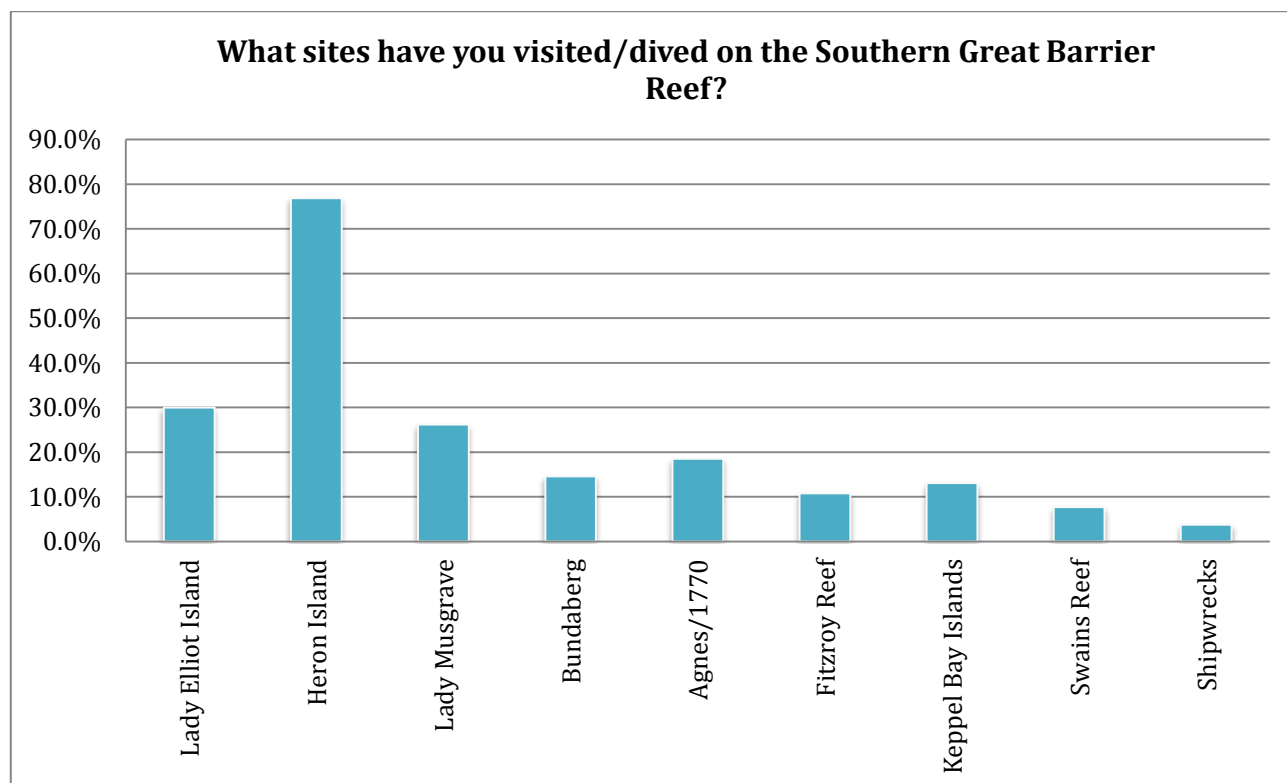


Ningaloo and South Australia were other Australian sites mentioned, with Cook Islands mentioned.

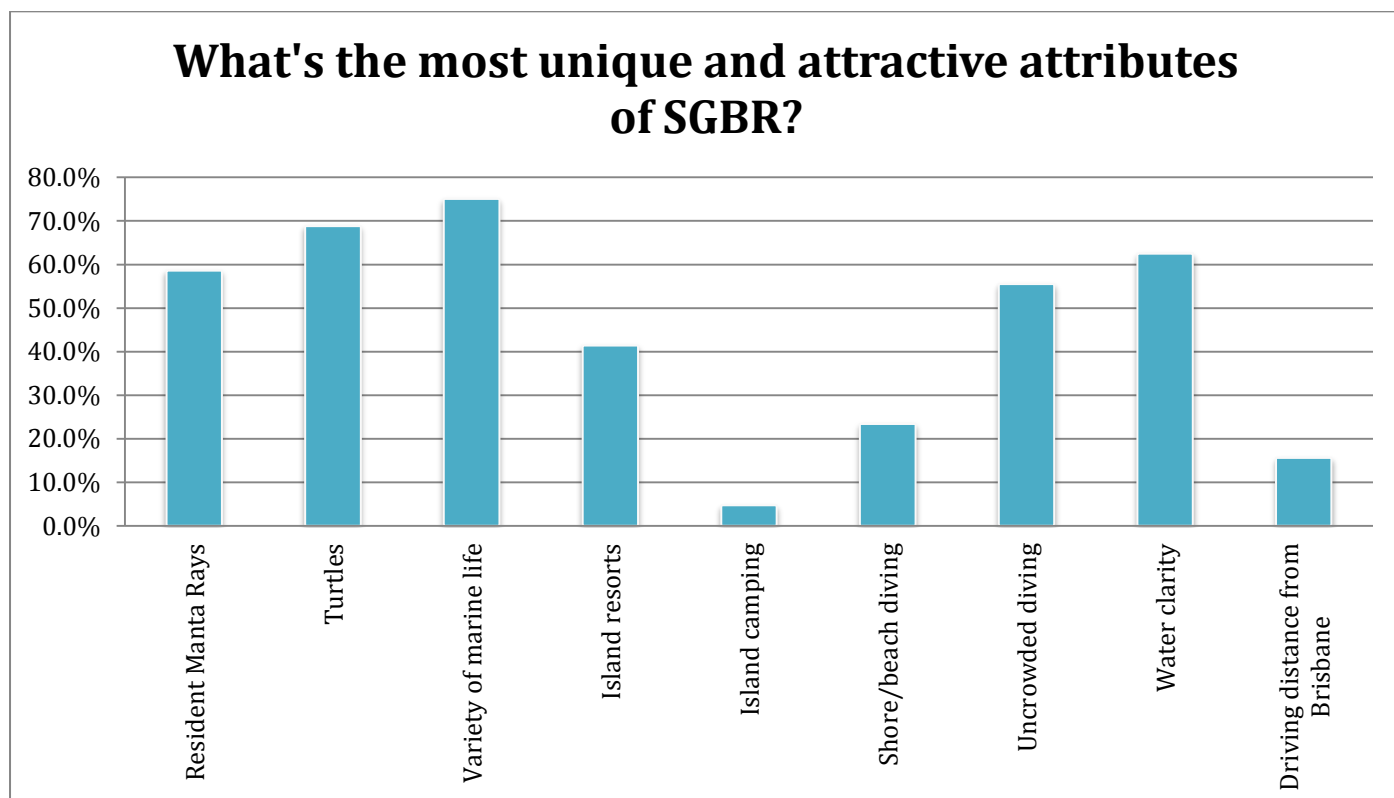
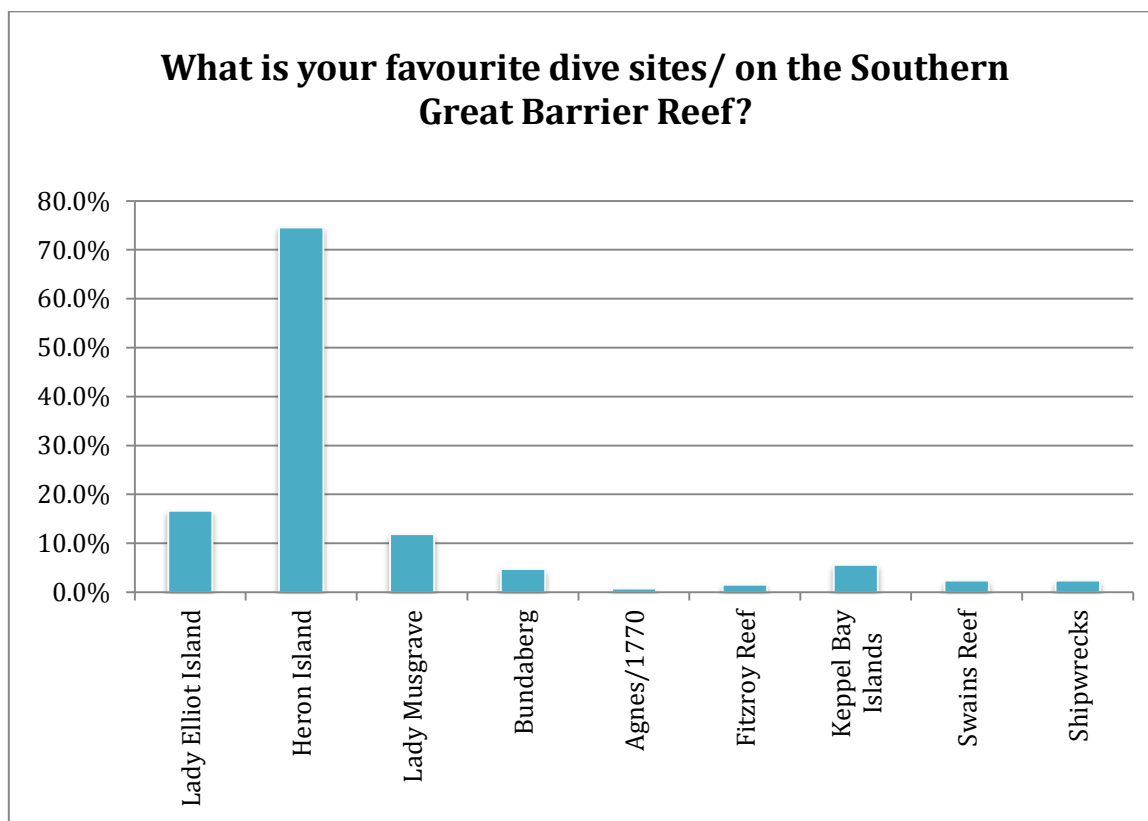
85% of respondents had dived the Great Barrier Reef. Of those respondents 70% had dived the Southern Great Barrier Reef



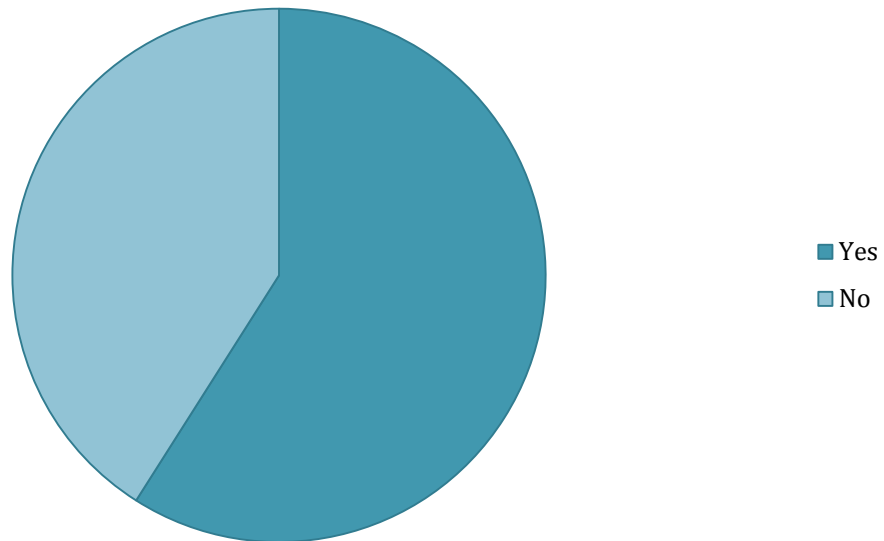
Of those who had dived the SGBR, most had dived Heron, followed by Lady Elliot Island, Lady Musgrave and Agnes/1770. The "Karma" was the most commonly dived shipwreck cited by respondents.



Heron, Lady Elliot, Lady Musgrave and Keppel Bay Islands were favourite dive sites. Northwest Island and the "Karma" shipwreck were also mentioned

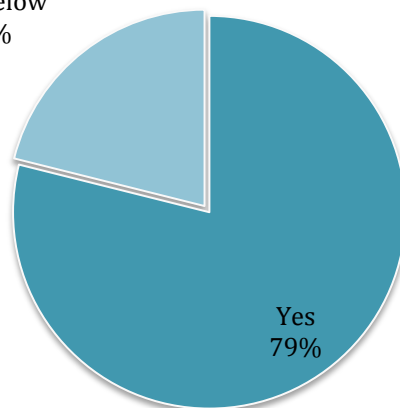


Do you dive with a Camera?



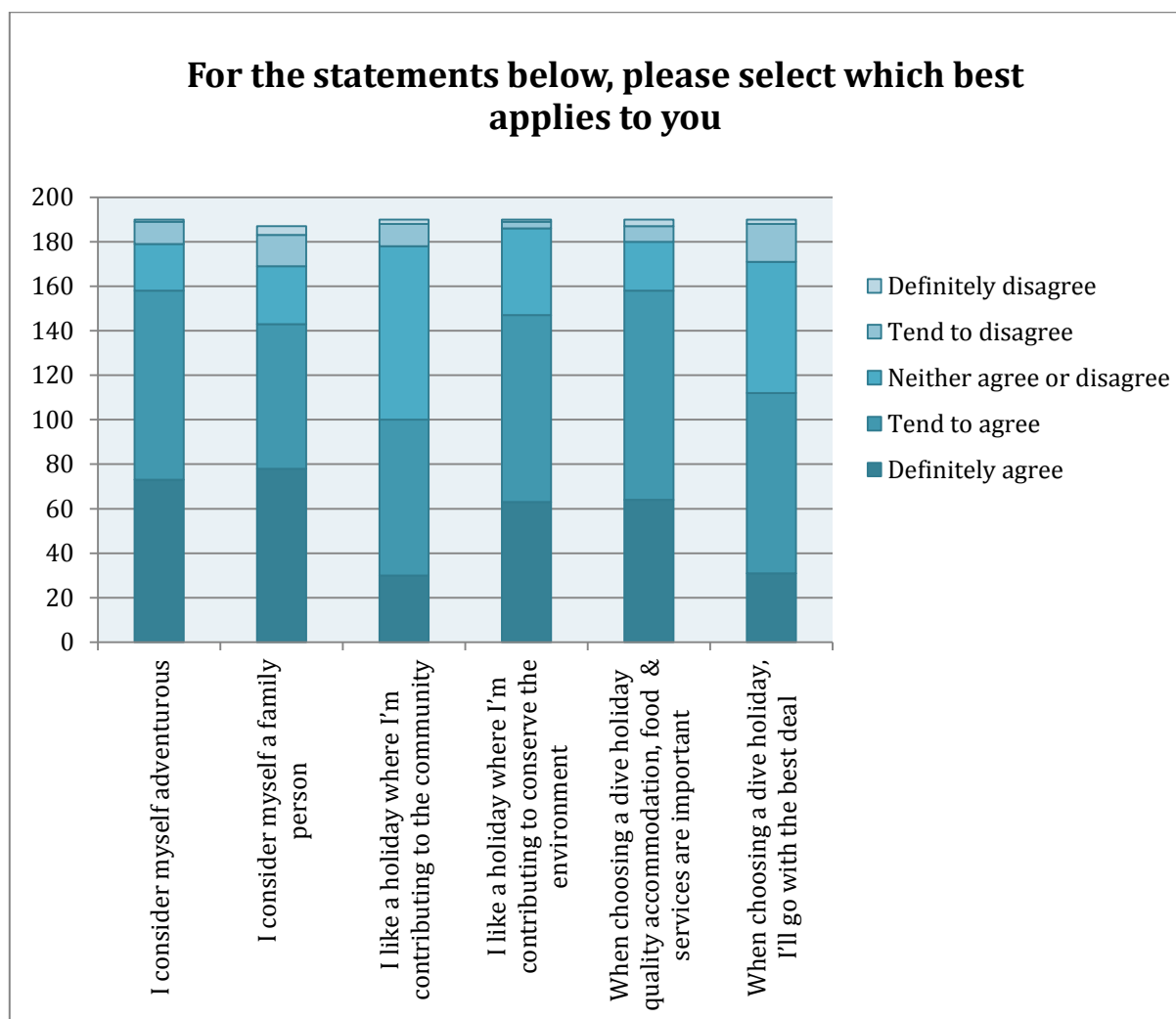
Would you be interested in diving on an artificial reef near the Great Barrier Reef if it was closer to shore and cheaper to access?

No, please share
why below
21%



Of the 21% that stated no they would not be interested in diving an 'artificial reef' they cited wanting a natural experience with some respondents stating they were not sure if it would have a detrimental effect on the GBR and fish stocks.

Most respondents considered themselves a family person, closely followed by an adventurous person. They were more concerned with contributing to the environment than the community and quality accommodation, food and services were more important than the best deal.



SHIPWRECKS OF THE SGBR

An online search revealed the following shipwrecks in the SGBR region and their coordinates.

Name of Vessel	Type	Depth	Coordinates
Barcoola	Trawler	41 m.	23° 46.930' S 151° 55.280' E
Cape Capricorn Barge	Barge	30 m.	23°27.900' S 151°14.850' E
Cetacea	Trawler		24°03.040' S 151°55.280' E
Bindaree	Trawler	26 m.	23°41.340' S 151°23.621' E
Linda Jane	Trawler	30 m.	
Melissa	Trawler	32 m.	23°29.690' S 151°25.490' E.
Joy Bird	Yacht	20 m.	23°27.904' S 151°14.770' E
Miss Shoalhaven	Trawler	30 m.	
Moreton Star	Trawler	20 m.	23°45.371' S 151°21.468' E
Nautilus	Barge	22 m.	23°54.240' S 151°38.650' E
Red Dolphin	Yacht	28 m.	23°40.894' S 151°25.908' E
Shannon 2	Trawler	40 m.	23°48.824' S 151°59.241' E
S.S. Glanworth	Steamer	5 m.	Settlement Point (Boiler)
Tamboora	Steamer	8 m.	

According to Peter Stone, author *Diving Australia*, the **America**, a vessel built in Quebec in 1827 and used as a convict transport arrived in Hobart in 1831 with 186 female convicts. She then sailed for Batavia but the southern reefs claimed her and she was abandoned on Wreck Island reef off Gladstone.

MARKETING AND PACKAGING EXAMPLES

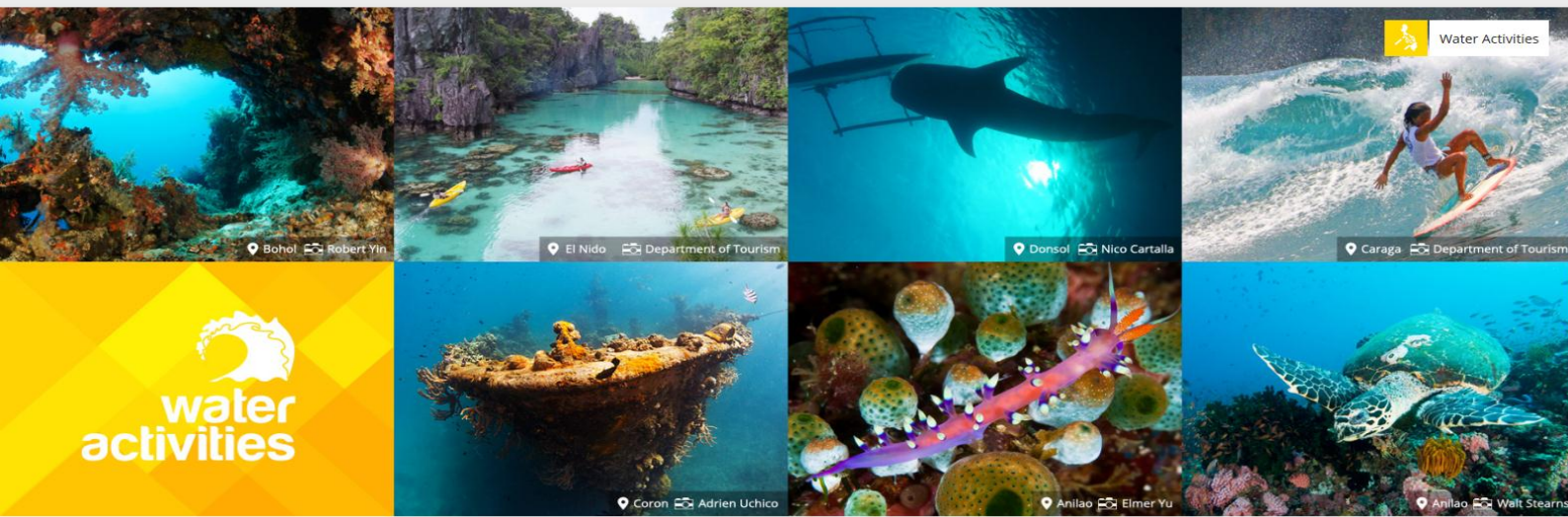


Wakatobi Resort in Indonesia is currently advertised online in dive networks. Its descriptions are impressive:-

Wakatobi Resort, the award-winning luxury eco dive resort in Southeast Sulawesi, Indonesia is where you can enjoy a level of service, remoteness and tranquillity rarely found anywhere else on the planet. Home of the world's most pristine reefs, Wakatobi offers what many claim to be the "best diving in the world."

"Be our guest in a resort built by divers for divers who are able to appreciate what Jacques Cousteau called *"probably the finest diving site in the world"* – a view since echoed by the testimonials of hundreds of divers from all over the world."

The food served here is an international blend, combining Indonesian delicacies and flavours with dishes from around the world.



IT'S MORE FUN IN THE PHILIPPINES

The Philippines is another destination that is marketing strongly in Australia and internationally, particularly online. Here is a snippet of their marketing.

GOOGLE ADWORDS EXAMPLE:-

GREAT DIVING & SURFING

Uncrowded waves, clear water. Warm all-year round. Visit us.
www.itsmorefuninthephilippines.com



The tourist hordes haven't quite infiltrated the Philippines yet, but the word is slowly spreading about South East Asia's biggest surprise. Spanning over 7000 tropical islands, the Philippines have much to offer holiday makers including tranquil lagoons, pure white beaches and some of the world's best snorkelling and diving spots.

7,107 islands make up the Philippine Archipelago. They offer more than triple the number of adventures. We can bring you to the atolls and reefs of Tubbataha, the myriad of colours and pelagic fish of Puerto Galera, the intricate macro marine life in the reefs of Anilao and the marine sanctuaries that are Apo Reef and Apo Island.

Cost of a coffee \$0.80 AU

Flights to Manilla ex. Sydney approx. \$1,100 AU

This is how the products are featured online with Dive Discovery Adventure Travel

PHILIPPINES DIVE RESORTS





[Alona Palm Beach Resort](#)



[Club Paradise](#)



[Anilao Outrigger Resort](#)



[El Galleon Beach Resort](#)



[Oasis Resort](#)



[Atlantis Dive Resort, Puerto Galera](#)



[Ocean Vida Beach and Dive Resort](#)



[Atlantis Dive Resort, Dumaguete](#)



[Bahura Resort](#)

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JUNE 2013