



**THE REEF-WORLD**  
FOUNDATION



**GREEN  
FINS** INTERNATIONAL  
COORDINATOR

# **SUSTAINABILITY** IN A RECOVERING TRAVEL WORLD

2022

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# INTRODUCTION

As the tourism industry recovers from the COVID-19 pandemic and operations worldwide open their doors once more to tourists, the team at The Reef-World Foundation has conducted an online survey to recognise travel trends and find out how important sustainability is regarded in this new era of tourism.

The last few years have been tough on the tourism industry and these are still uncertain times for many stakeholders that are highly dependent on tourism. Reef-World is hoping to assist in this rehabilitation process and aid marine tourism businesses, local governments and communities to not only bounce back but ready themselves for a bright future of travel, all whilst protecting what we hold most dear — the ocean.

The survey, launched from 1st April 2022 until the 14th June 2022, received over 2,400 responses from different age groups, demographics, diver training levels, tourists and tourism employees. Reef-World has been able to identify some of the key narratives that could be driving the market in the future, as well as understand the biggest challenges to overcome in order to implement environmental change and for businesses to be able to take advantage of these trends.



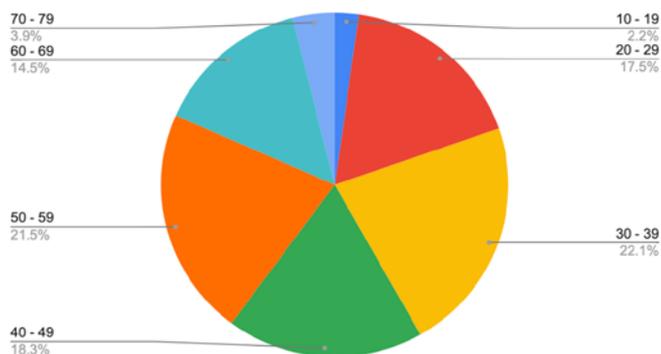
# DIVE TOURIST RESPONSE

As the marine tourism industry is a demand-driven market, understanding their mindset is invaluable. **The total count of dive tourist responses to this survey is 1,301.**

*(Please note that the response numbers may vary on some questions as we gave people the option to skip questions if they preferred not to respond.)*

## WHO DID WE COLLECT THE DATA FROM?

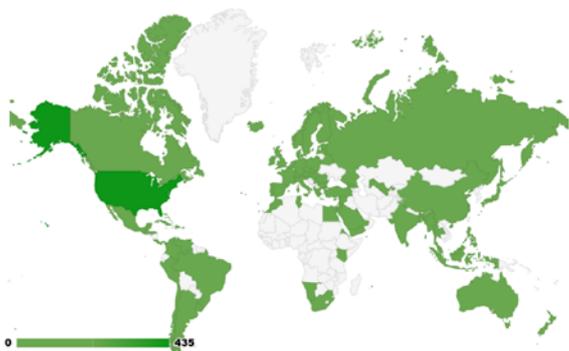
### AGE RANGE



We received responses from a wide variety of age groups ranging from as young as 10 years old to 79 years old.

**The average age is 44.6.**

### GEOGRAPHICAL SPREAD



The spread of the country of origin in this group can be seen here, with a total of **119 countries** represented.

Here is the vote count of the highest feedback rates:

- US: 435
- EU: 235
- UK: 139
- Canada: 100
- Australia: 84
- Asia: 93

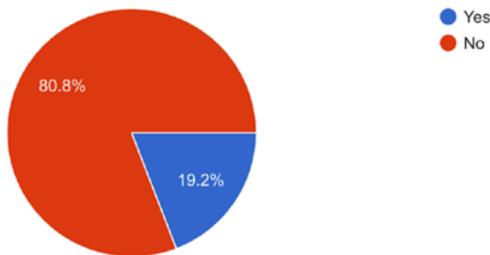




# KEY FINDINGS

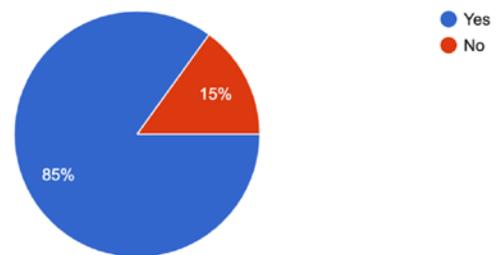
DO YOU USE A TRAVEL AGENT TO BOOK YOUR TRIP?

1,299 responses



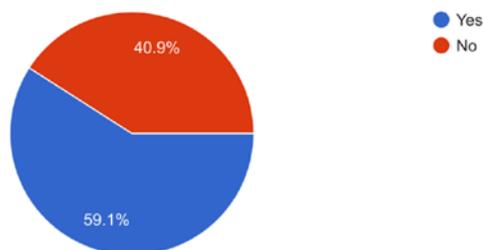
ARE YOU PLANNING A DIVE TRIP IN THE NEXT 12 MONTHS?

1,271 responses



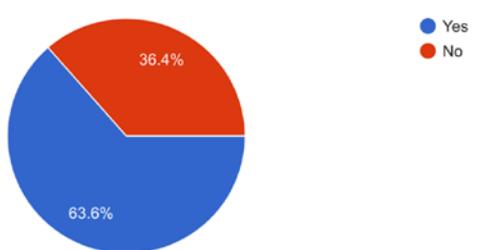
DO YOU SPECIFICALLY LOOK FOR SUSTAINABLE ALTERNATIVES?

1,297 responses

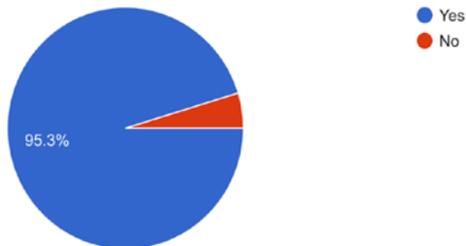


IS SUSTAINABILITY A MAIN CONSIDERATION IN YOUR TRAVEL BOOKING PROCESS?

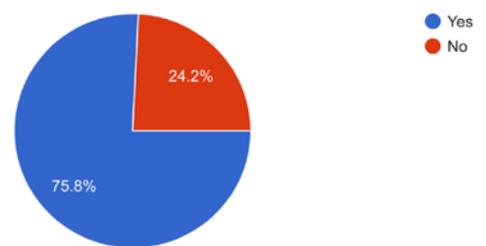
1,295 responses



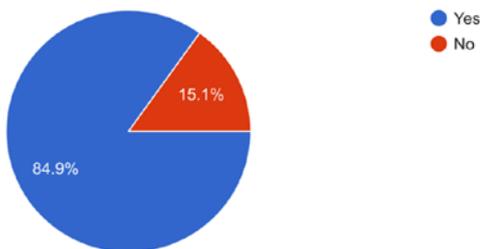
DO YOU THINK DIVE OPERATORS SHOULD BE DOING MORE TO CONSERVE THE REEF?  
1,299 responses



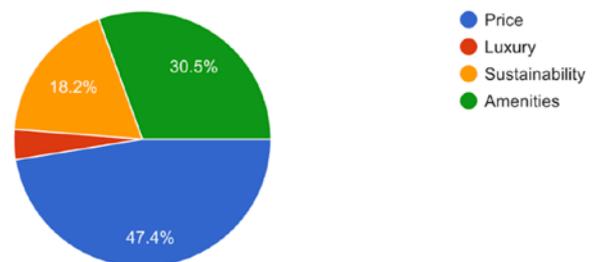
ARE YOU WILLING TO PAY MORE FOR A SUSTAINABLE OPTION?  
1,289 responses



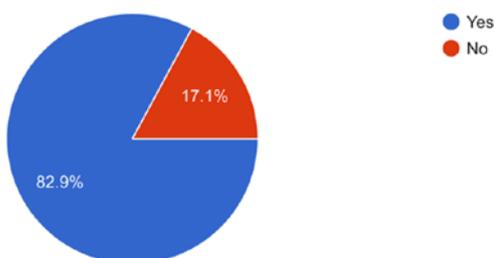
DO YOU FIND IT HARD TO SEE WHETHER A DIVE CENTRE/ RESORT IS TRULY SUSTAINABLE?  
1,291 responses



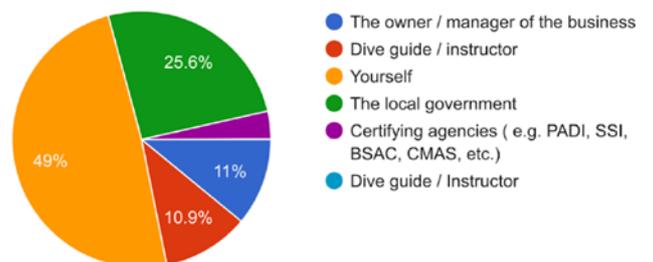
WHAT IS MOST IMPORTANT TO YOU WHEN BOOKING A TRIP?  
1,284 responses



ARE YOU LOOKING FOR FURTHER EDUCATION ON PROTECTING MARINE LIFE WHILE YOU ARE ON VACATION?  
1,295 responses

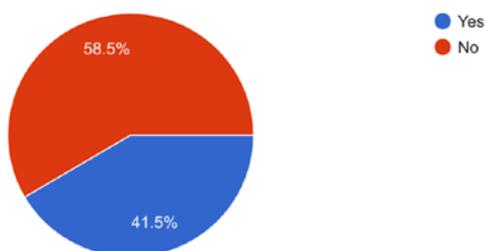


WHO DO YOU THINK HAS THE MAIN RESPONSIBILITY IN THE PROTECTION OF MARINE LIFE WHEN DIVING?  
1,290 responses

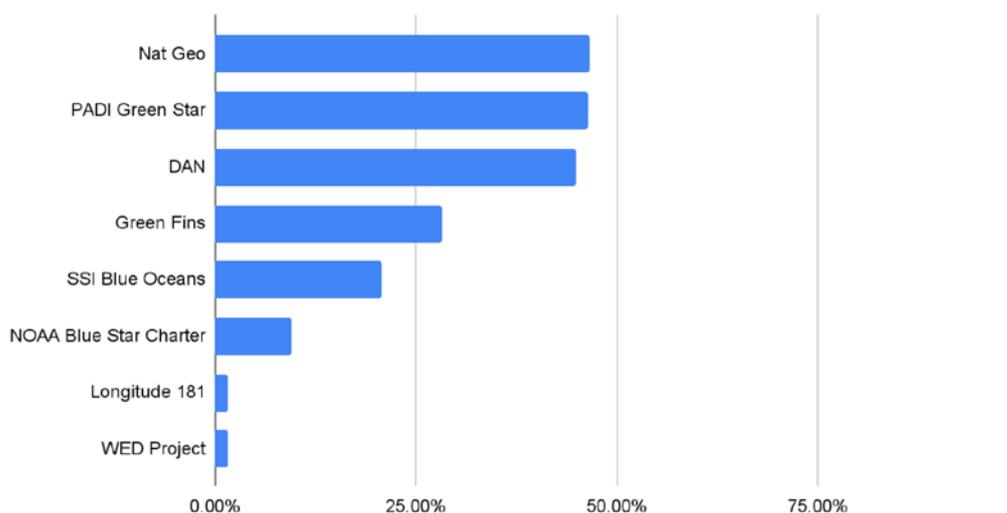


## HAVE YOU EVER HAD ANY BAD/ POOR EXPERIENCES DUE TO AN UNSUSTAINABLE OPERATOR? (TOUCHING ANIMALS, WASTE MANAGEMENT, ETC.)

1,296 responses



PLEASE INDICATE WHICH OF THE FOLLOWING SUSTAINABILITY PROGRAMS YOU HAVE HEARD OF:



### SUMMARY:

- The COVID-19 pandemic has left the public eager to travel again. In fact, 85% of respondents said they are planning a dive trip within the next year.
- From the data above, we can see the majority of dive tourists are looking for sustainable alternatives, are willing to pay for them and are looking to further their education on sustainability whilst on vacation.
- In fact, 95% of respondents think the dive industry should be doing more to conserve reefs. This means that there is commercial value in adopting sustainable business models and branding in order to attract more customers
- 84% of respondents stated they have difficulty seeing if a resort is committed to sustainability.
- None of the green initiatives prompted had a recollection of more than 50%.

These findings highlight that the main hurdle to overcome to meet consumer demand is to clarify what green initiatives entail and what an operation is doing to be more sustainable.



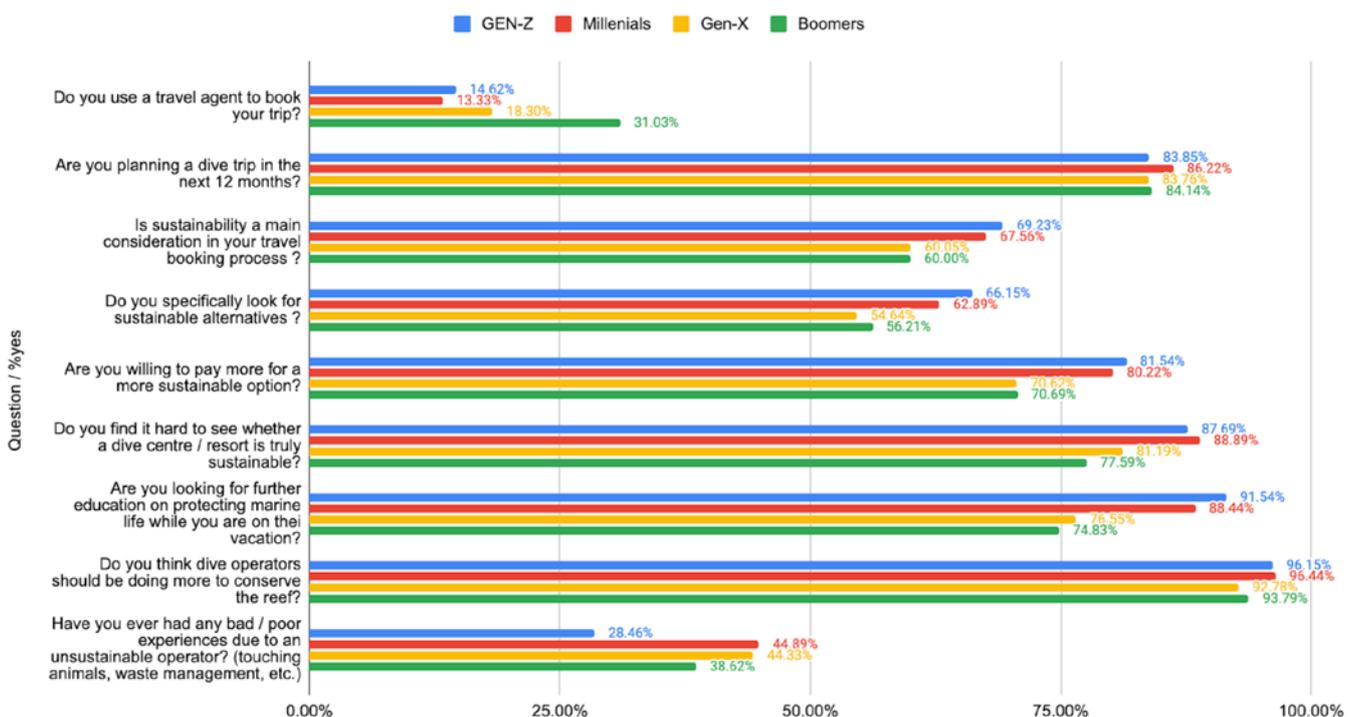
# HOW DO DIFFERENT DEMOGRAPHICS COMPARE TO ONE ANOTHER?

## GENERATION

Comparing different generations against each other can be helpful in spotting trends within the market as younger generations will be on the rise as their buying power increases.

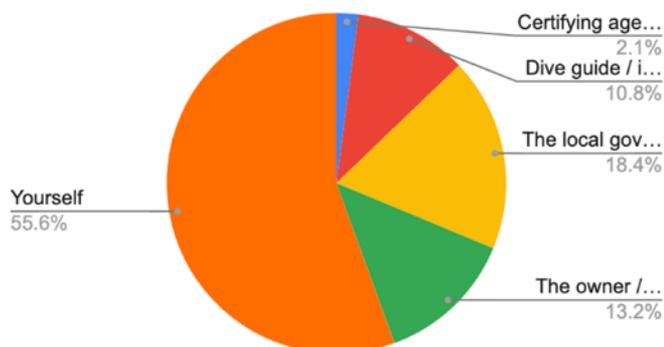
Here is the generational spread of the survey:

- Gen Z: 129
- Millennials: 450
- Gen X: 388
- Boomers: 290

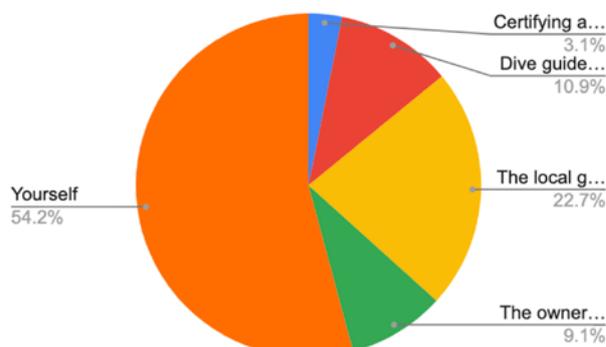


# COMPARING WHO DO YOU THINK HOLDS THE MAIN RESPONSIBILITY WHEN DIVING?

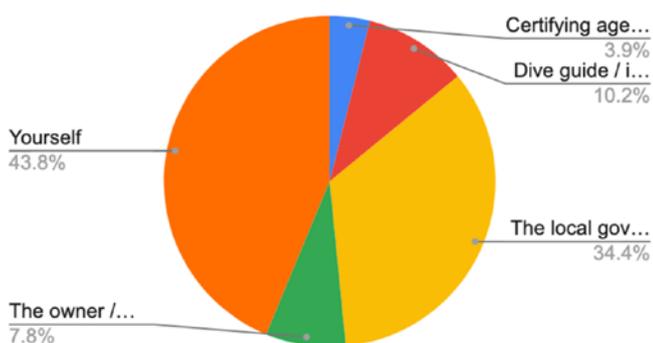
COUNT FOR BOOMERS



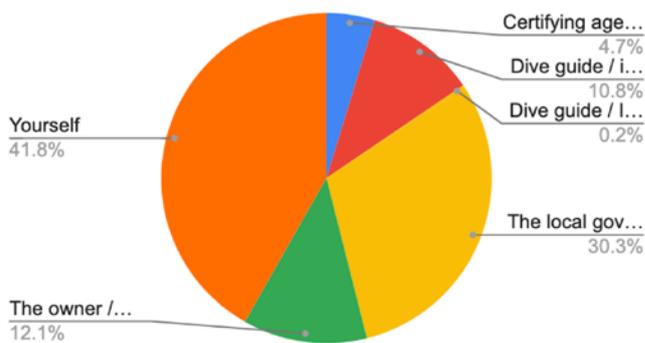
COUNT FOR GEN-X



COUNT FOR GEN-Z



COUNT FOR MILLENNIALS



Key:

- Certifying agencies (e.g. PADI, SSI, BSAC, CMAS, etc.)
- Dive guide/ Instructor
- The local government
- The Owner/ Manager of the business
- Yourself

The main trends that become visible when comparing different generational groups are that the younger generations (Gen Z & Millennials) are more attracted to sustainable options than older generations and are willing to pay for this.

Statistically, younger generations are looking for more sustainable options when booking a trip and want further education about sustainability and conservation efforts whilst on holiday.

It is also noteworthy that Gen Z and millennials place more responsibility on the local government in comparison to the older generations.

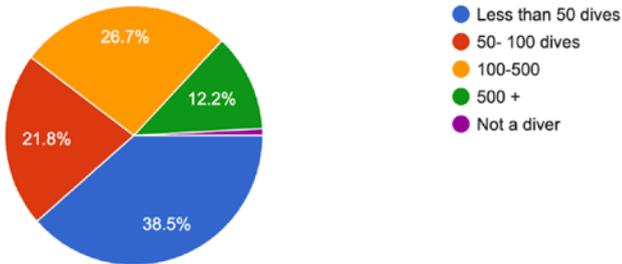
Based on a [McKinsey Study](#), the digital generations (Gen Z & Millennials) use consumption as a way of self expression, meaning their consumption aligns with their beliefs.

This data highlights the future of this industry as younger generations are becoming the biggest group of dive tourists and therefore the highest buying power.

# EXPERIENCE

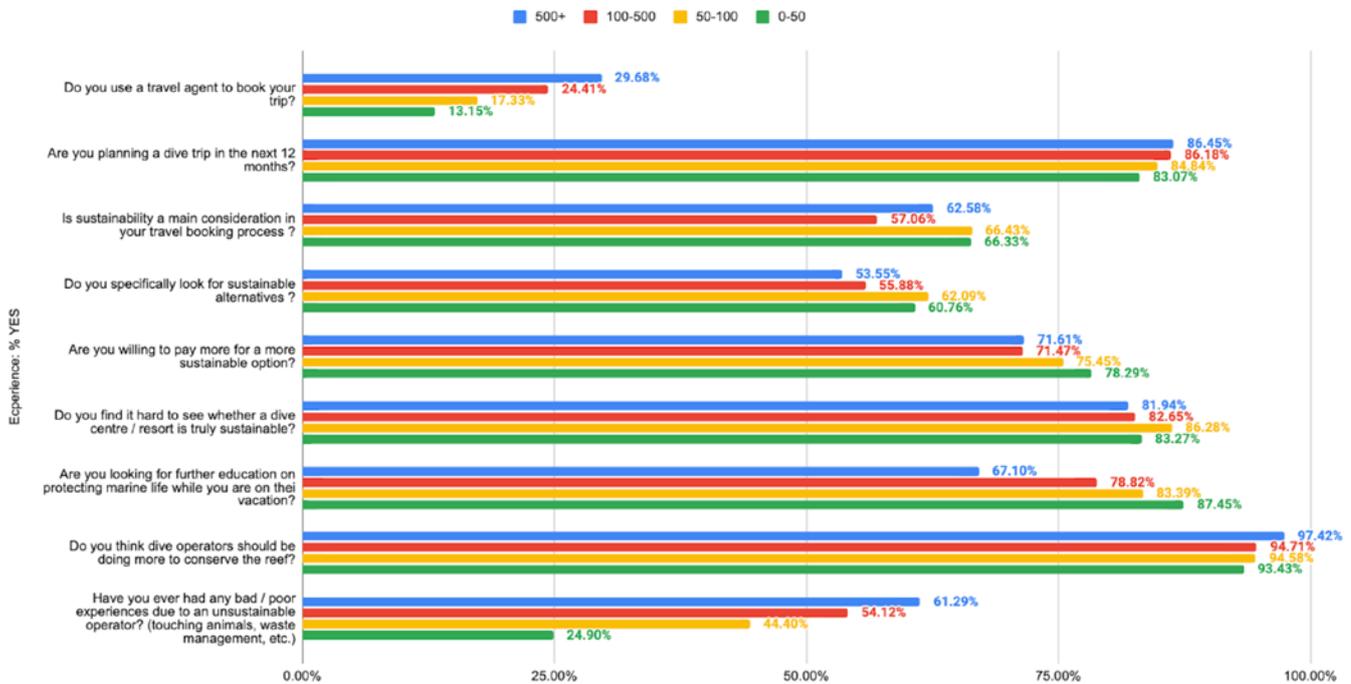
## WHAT IS YOUR DIVE EXPERIENCE LEVEL?

1,272 responses



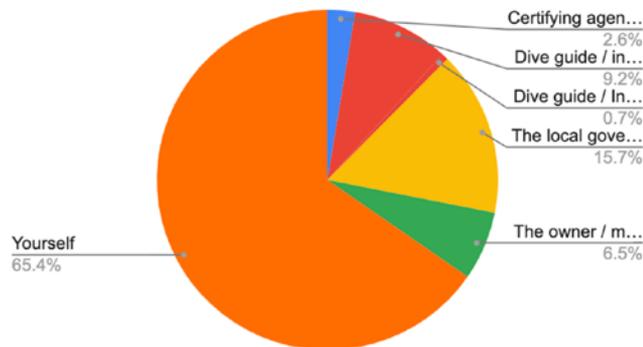
By comparing the dive tourists' experience levels, the data shows us whether divers with a higher level of training think differently about travel sustainability, than newer or less experienced divers.

## EXPERIENCE COMPARISON

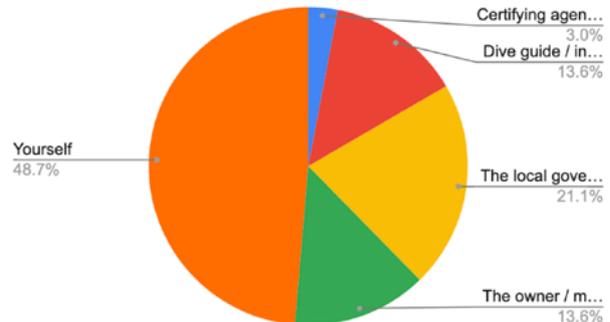


# WHO DO YOU THINK HOLDS THE MAIN RESPONSIBILITY WHEN DIVING?

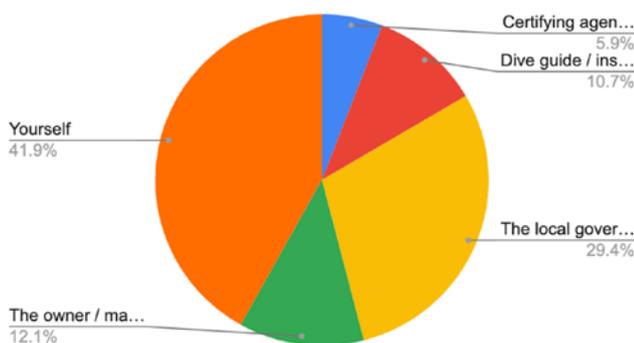
COUNT FOR 500+ DIVES



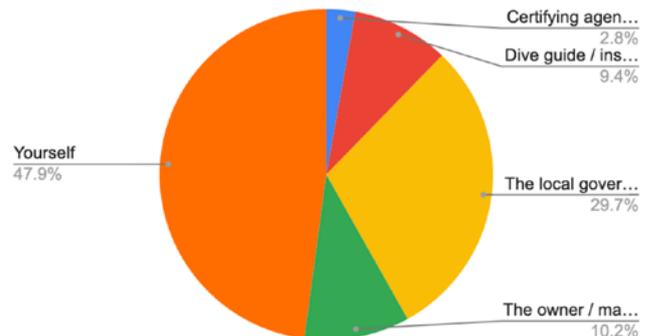
COUNT FOR 100-500 DIVES



COUNT FOR 50-100 DIVES



COUNT FOR 0-50 DIVES



Key:

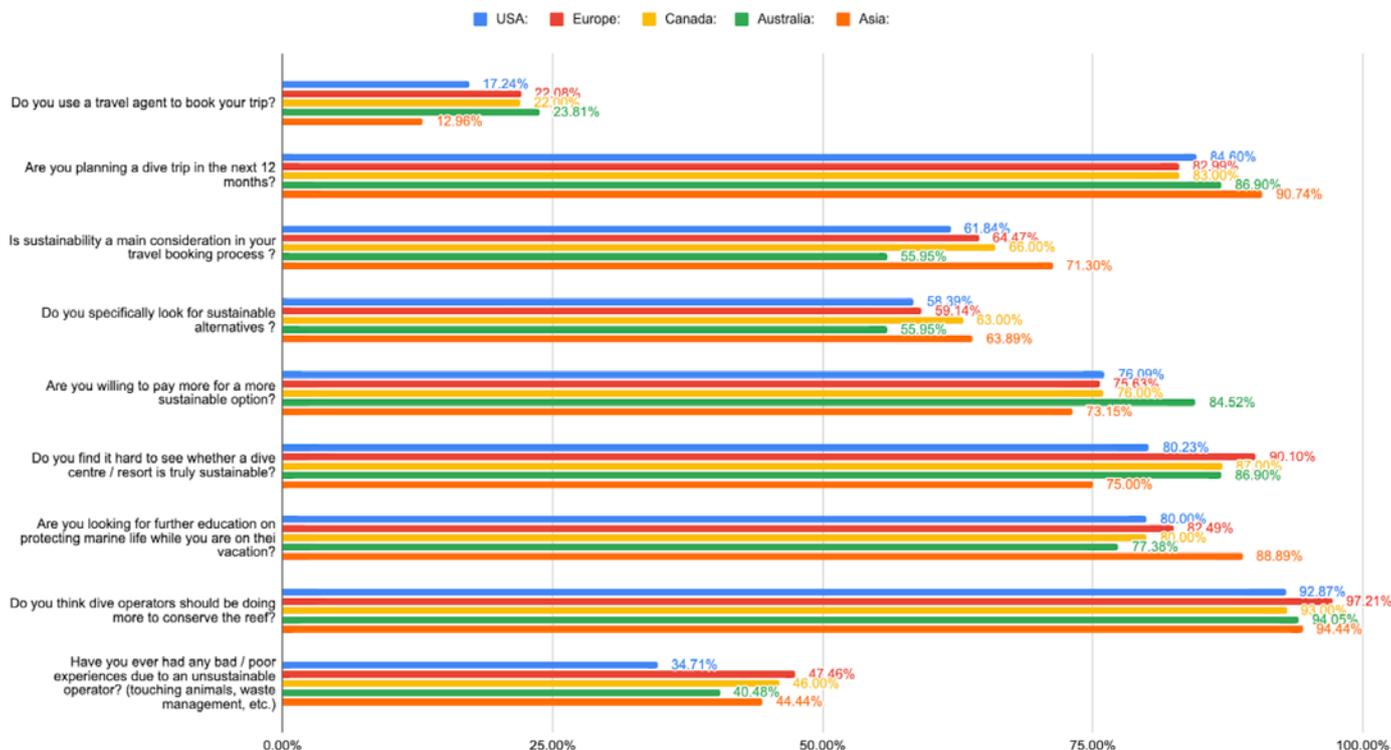
- Certifying agencies (e.g. PADI, SSI, BSAC, CMAS, etc.)
- Dive guide/ Instructor
- The local government
- The Owner/ Manager of the business
- Yourself

Less trained divers are more actively engaged in sustainability and willing to spend more on it. This might be due to the fact that they have done their training more recently and had updated modules that cover the environment within their course.

If this is the case, then including more information about sustainability in training courses could lead to a change in dive tourist behaviour about the importance of protecting the marine environment.

## GEOGRAPHICAL SPREAD

Here is how different geographical locations compare to one another:



Asian dive tourists seem to be the strongest group when it comes to looking for sustainable solutions as well as training on these issues.

Australian dive tourists seem to be more willing to pay for sustainability.

Europeans have the highest percentage of answering 'yes' when asked if they thought dive operators should be doing more to conserve the reef, and indicating they find it hard to see if an operation is sustainable.

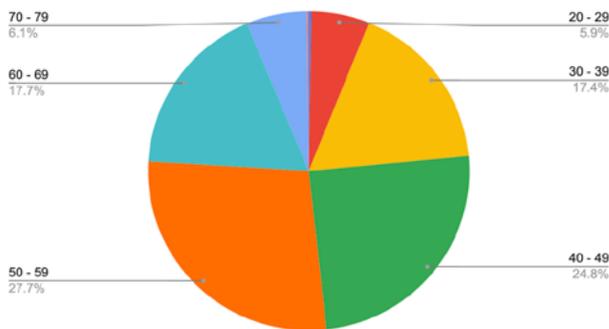
# DIVE PROFESSIONAL RESPONSE

In this segment, the dive industry professionals' response is cross-examined in regards to what they think about sustainability, where they see the main obstacles to overcome and how their opinion differs from the ones stated by the dive tourists.

The total number of responses was 1,140.

## WHO DID WE COLLECT THE DATA FROM?

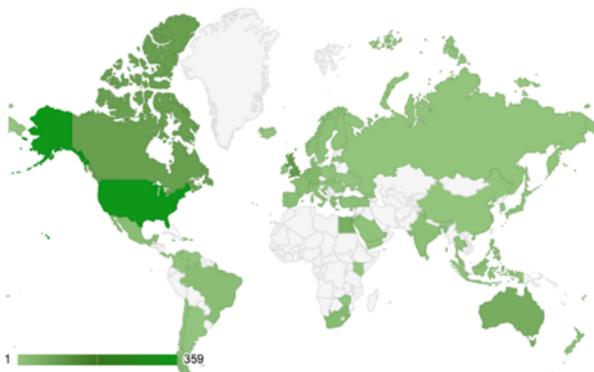
### AGE RANGE



We received responses from a vast variety of age groups ranging from 17 to 86 years old.

The average age was 49.7

### GEOGRAPHICAL SPREAD

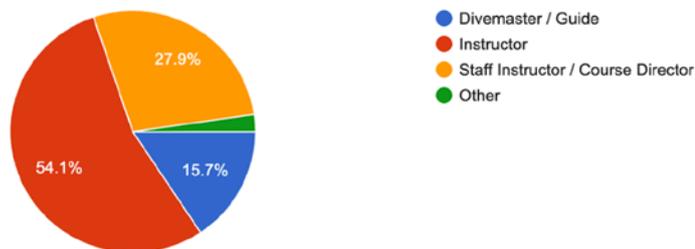


The spread of the country of origin in this group can be seen here with a total of **103 countries represented**.

## DIVE EXPERIENCE

### WHAT IS YOUR DIVE EXPERIENCE LEVEL?

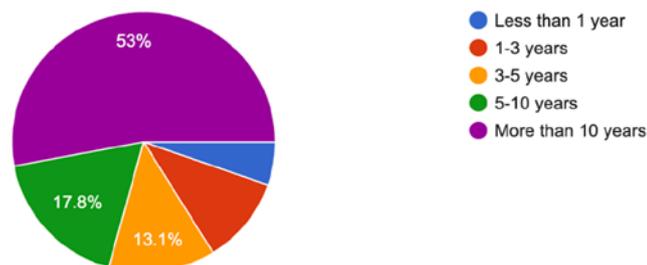
1,136 responses



The **vast majority of respondents were instructors**, but also a fair amount of responses came from **higher training levels such as dive guides and office staff**.

### HOW LONG HAVE YOU BEEN WORKING IN THE DIVING INDUSTRY?

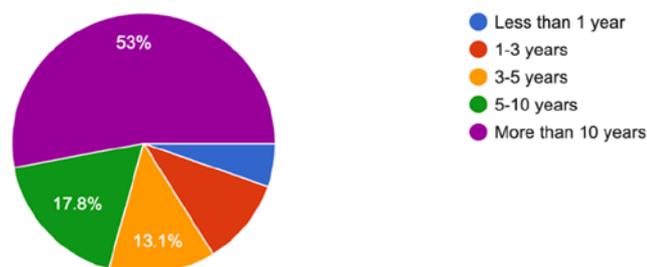
1,138 responses



**More than half (53%) of the respondents have extensive experience within the dive industry** (more than 10 years). The other 47% were made up of people that have worked in the industry from less than 1 year to 10 years.

### WHAT IS YOUR ROLE IN THE DIVE CENTRE?

1117 responses



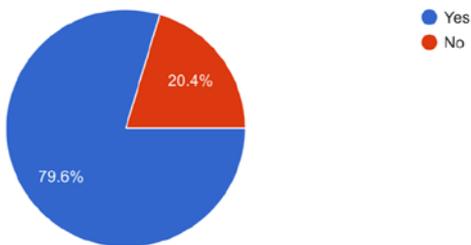
When asked about their role within the industry, **50% of respondents stated they were working as an instructor**.

The second strongest group were management and owners, followed by dive guides and finally, others (e.g. office staff, marketing, reservations, technical assistance, captains etc. )

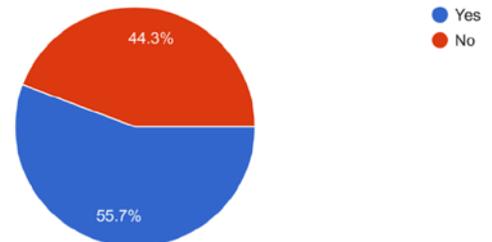


# KEY FINDINGS

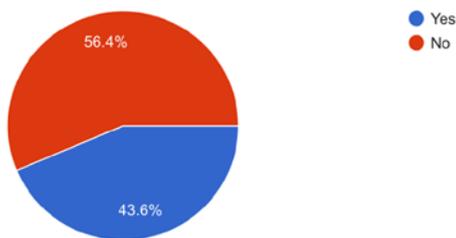
DO YOU THINK POTENTIAL CUSTOMERS ARE ACTIVELY LOOKING FOR MORE SUSTAINABLE DIVE OPTIONS?  
1,152 responses



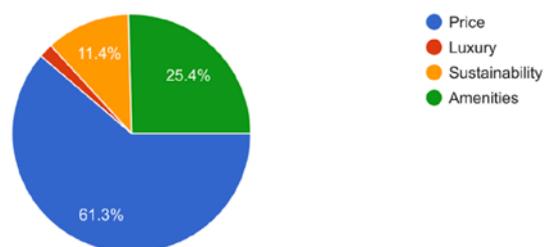
DO YOU THINK DIVERS ARE WILLING TO PAY MORE FOR DIVE CENTRES THAT ARE COMMITTED TO SUSTAINABILITY?  
1,149 responses



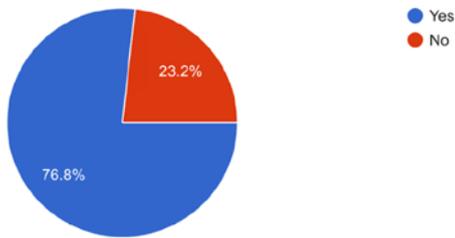
DO YOU THINK IT IS EASY FOR DIVERS TO SEE IF A DIVE CENTRE/ RESORT IS COMMITTED TO SUSTAINABLE PRACTICES?  
1,146 responses



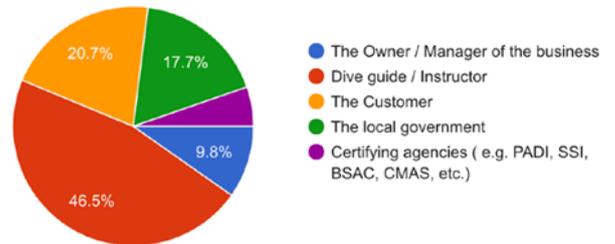
WHICH ONE OF THE FOLLOWING IS THE MOST IMPORTANT FOR A CUSTOMER WHEN CHOOSING A DIVE OPERATOR?  
1,146 responses



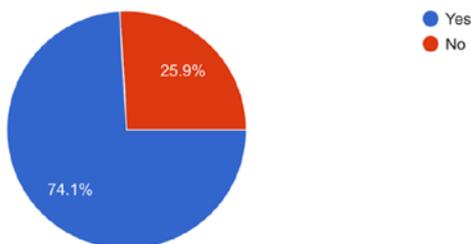
DO YOU THINK YOUR DIVE OPERATION/  
THE OPERATION YOU WORK IN SHOULD BE  
DOING MORE TO BE SUSTAINABLE?  
1,133 responses



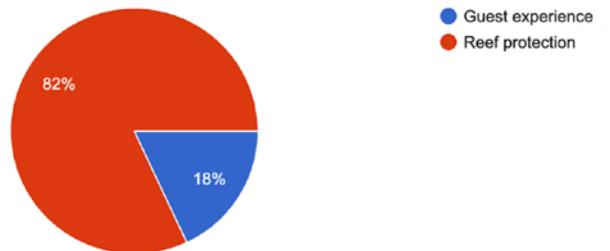
WHO DO YOU THINK HAS THE MAIN  
RESPONSIBILITY IN THE PROTECTION OF  
THE REEF WHEN DIVING?  
1,146 responses



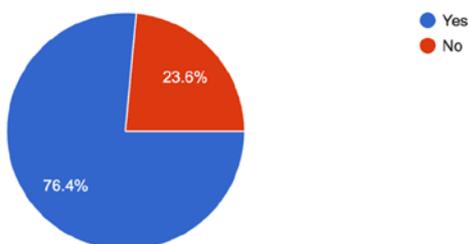
DO YOU THINK CLIMATE CHANGE WILL  
AFFECT YOUR BUSINESS/ JOB SECURITY IN  
THE FUTURE?  
1,149 responses



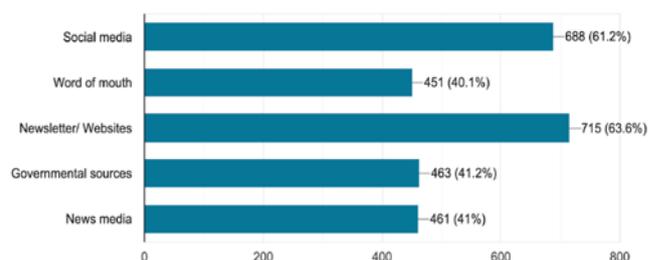
WHICH ONE DO YOU THINK IS MORE  
IMPORTANT?  
1,132 responses



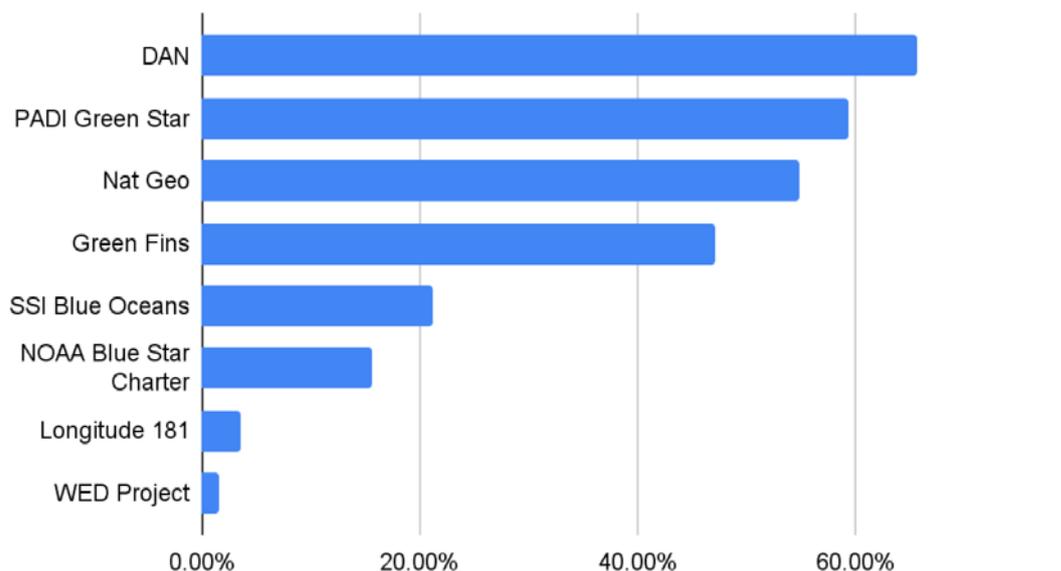
DO YOU THINK CUSTOMERS ARE  
LOOKING FOR WAYS TO BE EDUCATED ON  
PROTECTING MARINE LIFE WHILE THEY  
ARE ON THEIR VACATION?  
1,132 responses



WHERE DO YOU SOURCE YOUR  
INFORMATION ON LOCAL ISSUES AND  
ECO-RELATED NEWS IN YOUR AREA?  
1,143 responses



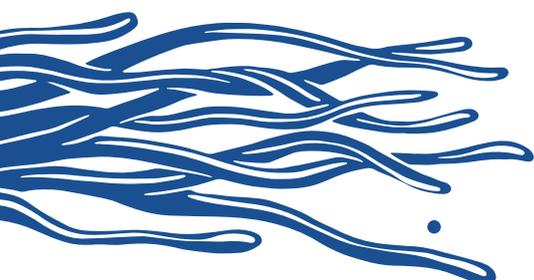
PLEASE INDICATE WHICH OF THE FOLLOWING SUSTAINABILITY PROGRAMS YOU HAVE HEARD OF:



## SUMMARY:

The responses from dive professionals also shed light on the needs and opportunities within the tourism industry:

- The data shows that a majority of the respondents in this group are aware of dive tourists looking for more sustainable alternatives (79.7%) and are looking to educate themselves on this topic (76%), but only 55% believe their customers would pay extra for this.
- 43.5% believe it is easy to see if resorts have sustainable practices and 76% of them think that dive operations should be doing more to protect the environment. There is also a greater awareness among the dive professionals than the dive tourists when it comes to brand recollection.
- A noteworthy 74% of dive professionals state that they think climate change will affect their job security in the future.
- In general, the job role within the operation (comparing different training levels and positions) had little influence on their opinion. The only exception is that owners and managers seem to be most worried about their job security due to climate change.



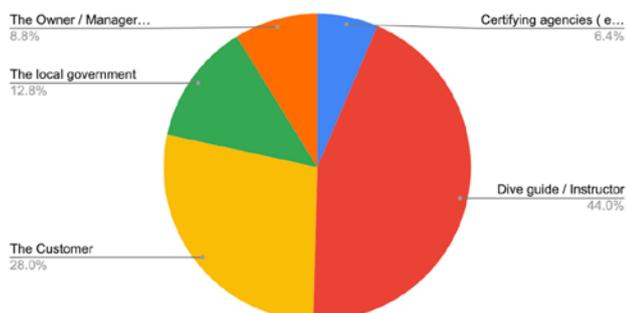


# HOW DO DIFFERENT JOB ROLES COMPARE TO ONE ANOTHER?

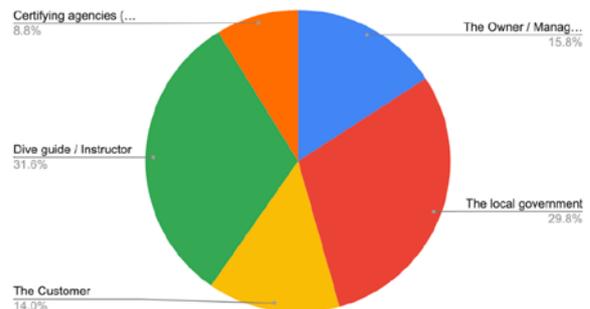


## WHO DO YOU THINK HAS THE MAIN RESPONSIBILITY IN THE PROTECTION OF THE REEF WHEN DIVING?

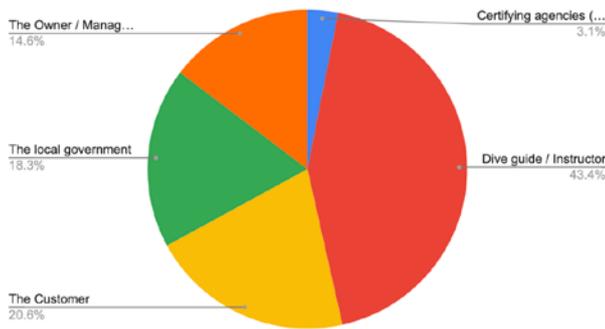
### DIVEMASTER



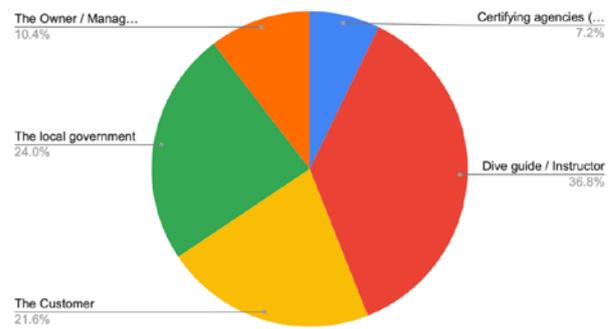
### INSTRUCTOR



## MANAGER/ OWNER



## OTHER

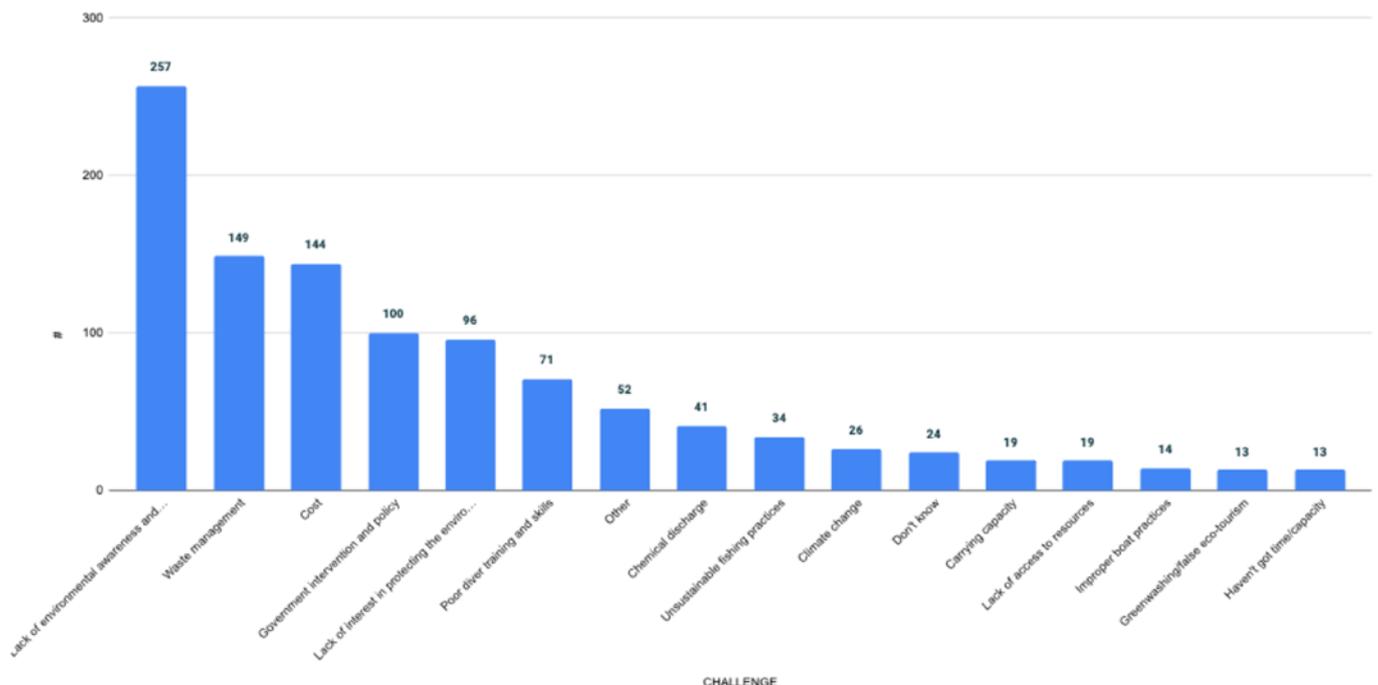


Key:



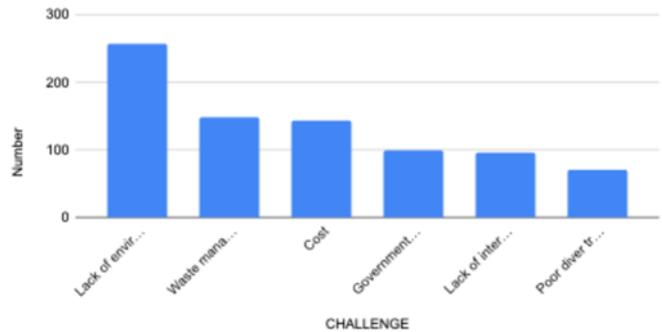
# UNDERSTANDING THE BIGGEST CHALLENGES WITHIN THEIR ROLES

WHAT ARE THE MAIN CHALLENGES WITH SUSTAINABILITY YOU CAN SEE IN YOUR DAY TO DAY ROLE?



Dive professionals were asked what they consider the biggest challenges day-to-day within their workplace. **948 dive professionals responded to the question, raising 1,072 challenges in total.** The most common responses are explained in more detail below.

WHAT ARE THE MAIN CHALLENGES WITH SUSTAINABILITY YOU CAN SEE IN YOUR DAY TO DAY ROLE?



## LACK OF ENVIRONMENTAL AWARENESS AND EDUCATION

This challenge received 257 mentions from dive professionals. Dive professionals agree that information and education is the biggest challenge they face regarding how to be more sustainable in the workplace. Issues raised include:

- The need for better education and awareness for dive customers
- Proper environmental training for dive staff
- Information of how to be a role model at work
- Creating incentives and building capacity and practicality for sustainable practices
- Improving education within local communities
- Teaching tourists about how to look for more sustainable ways to dive
- To bring the global role of the ecosystem to the mind of divers

## COST

The cost of sustainability received 144 mentions. Dive professionals believe there are added costs linked to more sustainable options which poses a challenge within the day-to-day running of a business. That includes:

- Environmentally-friendly products are more expensive
- Enhancing sustainability within a business is an added investment
- If the business spends money to become more sustainable, prices will have to increase
- Assumption that customers will not be willing to pay extra for sustainable holidays

## WASTE MANAGEMENT

Waste management (149 mentions) is considered the second biggest challenge by the dive professionals. Topics within this section include:

- Single use plastics
- Overuse of plastic for dive products and packaging
- Waste management (e.g. segregation/collection/recycling etc)
- Boat construction equipment and waste
- Marine debris in dive sites and coastal areas

## GOVERNMENT INTERVENTION AND POLICY

Dive professionals responded that national and local government policy is causing added challenges to their day-to-day work (100 mentions). Some answers include:

- There are not enough regulations in place to protect the environment
- They do not feel supported from local agencies and government
- They do not think local governments are committed to enforcing local rules and regulations
- Government bureaucracy hinders the progress of sustainability
- World leaders are not making change at the necessary pace to target conservation issues

## LACK OF INTEREST IN PROTECTING THE ENVIRONMENT

Dive professionals responded that they think the general public – and dive tourists – are not interested in protecting the environment (96 mentions). In particular, the following issues were raised:

- It's difficult to motivate divers beyond just "enjoying the dive"
- Apathy from the general public
- There is a gap between people who want to be sustainable and people who don't care
- Not universally considered a priority by all stakeholders
- "Lazy" or "reckless" divers
- Irresponsible dive centre owners

## POOR DIVER TRAINING AND SKILLS

This challenge received 71 mentions from dive professionals. The following issues were raised:

- A lot of instructors shortcut their training
- Not teaching proper buoyancy technique in order to stay away from delicate marine life
- Dive tourists touching things, harassing animals or kicking coral with their fins
- Handling underwater photographers
- Lack of special care over new divers



© Ocean Image Bank | Amanda Cotton



# DIVE TOURIST AND DIVE PROFESSIONAL RESPONSE COMPARISON

The comparison of these two groups can help us gain a better understanding of the status of the industry, identify trends that are commonly accepted and address misconceptions or potential problems with the adaptation of sustainable practices.

- When asked if they were willing to pay more for a sustainable option, 75.8% of divers stated they would be willing to do so whilst only 55.7% of dive professionals stated they think that their customers would. In fact, the price of sustainability was ranked second highest on the main challenges listed by dive professionals.
- 56.5% of dive professionals stated they do not think it is easy for divers to see if a tourism business is sustainable. When asked the same question, a much larger percentage (84.4%) of dive tourists said it is hard for them to see if a tourism business is sustainable.
- Dive tourists' lack of brand awareness of sustainable certifications may be a reason why they are not actively spending more for sustainable alternatives, as they are not sure what they are paying for and how impactful it may be.

- **There is a clear gap in the market here:** Dive tourists are willing to pay more for proven environmentally-friendly products however they have found the lack of transparency from marine tourism businesses is holding them back from spending money. This explains why dive professionals are not seeing this demand, as their customers may not be spending their money on courses and holidays when there's ambiguity around what is really sustainable.

- Both parties agreed on the fact that dive operations should be doing more to protect coral reefs and work harder to be sustainable, with 76.8% of dive professionals and an astonishing 95.3% of dive tourists.

It is clear that there is great growth potential in committing to sustainable changes. In order to capitalise on this, clarity and clear communication with dive tourists will be of utmost importance. Dive tourists are holding businesses responsible for protecting the marine environment and are looking at the industry to adapt to make the changes so desperately needed to protect and conserve marine ecosystems.



# HOW THIS SURVEY **COMPARES** WITH OTHER DATA

The need for more awareness of sustainability is clear, but this survey also highlights the incredible opportunity coming with it. Diver tourists are not only looking for sustainable alternatives, but they are also willing to pay for them. This is even more apparent with younger generations.

A [study](#) done by Condor shows that Millennials are the “most travelling” age group in the current market with an average of 5.6 trips per year. Combining this information with the fact that Millennials are now the biggest populational group (e.g. US 21.93%) and Gen Z has already overtaken the Gen X, the business opportunity for a long-lasting and sustainable strategy becomes an obvious one.

Addressing sustainable change within our industry not only allows us to secure the future of it, but also can lead to increased revenue in the long run by aligning ourselves with the market of the future. Based on the [Google Trends](#) from 2021, “over 80% of people say sustainability is more top of mind now than before the pandemic”.

Furthermore, conservation and sustainability educational courses could accelerate change and increase brand awareness and consumer loyalty. The biggest hurdle to overcome will be building consumer awareness of sustainable courses and programmes and increasing transparency with dive tourists to prevent ‘Greenwashing’. [The Global Ecolabelling Network \(GEN\)’s 2019 report](#) noted that Greenwashing is particularly prominent in labels “that assess only one aspect (for example, energy efficiency or water consumption indicators), not allowing consumers to compare products systematically, and also largely replacing general environmental friendliness with only one indicator.”

The GEN report recognised the growing need for government intervention in green activities within different sectors. In support of this, [Cone Communications’ corporate social responsibility study](#) shows that in the absence of government action, 6 out of 10 Americans expect corporations to drive social and environmental change. This means that dive tourists might hold businesses accountable for not driving change with the lack of government enforcement.



This survey has shown how consumer demand has changed since the COVID-19 pandemic. Dive tourists now want more sustainable holidays and more clarity on the effectiveness of environmentally-friendly options on their dive trips. The tourism industry is in need of a global green label that is brand-conscious, transparent and effective.

[The Reef-World Foundation](#) leads the global implementation of the UN Environment Programme’s [Green Fins](#) initiative, which focuses on driving environmentally friendly scuba diving and snorkelling practices across the industry globally. Established in 2004, this is a proven conservation management approach that leads to a measurable reduction in the negative environmental impacts of marine tourism.



**THE REEF-WORLD**  
FOUNDATION



**GREEN FINS** INTERNATIONAL  
COORDINATOR

### **GREEN FINS OFFERS CLARITY**

Green Fins offers the world’s first independent certificate to stop the environmental impact from marine-based tourism. Marine tourism operators can choose to become Green Fins Members and pledge to follow a rigorous [Code of Conduct](#): a 15-step set of guidelines that covers best practices for both above and below the water and considers the role of managers, operator staff and tourists.

The Green Fins initiative looks at a tourism business holistically, avoiding the risk of providing an eco-label built upon “Greenwashing”. Operators receive either an in-person assessment or conduct a self-evaluation of their businesses (depending on membership type), and are then scored within a scrupulous and objective scoring system. From there, managers or owners choose a set of achievable action points for their year of membership.

Green Fins messaging and outreach continues to increase globally, and brand recognition is a vital tool to support this initiative as a leading voice for eco-tourism. In early 2022, Reef-World released the Green Fins rebrand that included an [updated logo and Branding & Communication Guidelines](#) to represent the initiative's global expansion and inclusivity of all its stakeholders. Green Fins Members are given full use of the logo for their promotional materials so that consumers can easily recognise operators that are part of the growing network in doing their part to be sustainable.

## **GREEN FINS GIVES CONSERVATION EDUCATION**

As the survey data suggests, there has never been more demand for environmental education. Dive professionals are now expected to be trained in basic marine biology and conservation as well as their safety skills. That's why Reef-World developed the [Green Fins Dive Guide e-Course](#) for industry professionals to enhance their knowledge of the marine environment. In Q1 and Q2 2022, 92.12% of dive professionals said their knowledge of environmental best practice improved after completing the course.

Similarly, the [Green Fins Diver e-Course](#) offers recreational divers insights into how to become more environmentally aware and learn how to have zero-impact dives. It serves as an effective tool for operators to offer their guests who are interested in enhancing their environmental education. Since its launch in 2021, 95.95% of students feel motivated to demand better practices from dive businesses and 90.54% plan to utilise their new knowledge to dive in a more environmentally friendly manner after finishing the course.

Noticing the lack of industry communication with key conservation issues, Reef-World is in the process of launching the Green Fins Community Forum. This forum will be launched later in 2022 to provide a crucial space for Members to discuss key environmental issues and share lessons and ideas with like-minded operators, NGOs, Governments and industry partners from all over the world. This kind of forum has never been seen by this industry before, and aims to be groundbreaking in tackling key conservation issues within the marine tourism industry.

## **GREEN FINS OFFERS PRICE EFFECTIVENESS**

Green Fins offers environmental solutions that derive from decades of industry experience. Not only are these environmental solutions proven to work, but they are also cost-effective, dissolving the myth that improving sustainability comes with a hefty price tag.

The Green Fins memberships and digital tools are all offered free of charge or at an affordable cost. For example, certified membership is offered for free (or "pay what you can") and digital membership is set at a price of \$140 for the first year and reduces to \$60 for each year after for returning operators. Additionally, all of the materials offered on the [Green Fins website](#) are completely free to download, regardless of whether an individual is affiliated with a member or just wants to print and display some useful information.

Similarly, the e-course prices are suited to what dive professionals and dive tourists can realistically afford. The Dive Guide e-Course is offered for free, with an option for dive pros to purchase a \$25 certificate as proof of participation. The Diver e-Course is offered for \$25, which follows the proven understanding that customers are willing to pay for educational materials. And the participants agreed – 85.14% of course participants rated the course as "very good value" or "good value" for money. Additionally, scholarships are available for both professionals and tourists who are unable to pay for the course or certification.