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Mapping of the Current State of Diving Tourism in Greece

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Abstract: The purpose of the present study was to map the current and the developing potential of diving tourism in Greece, mainly by defining the Greek diving industry's stakeholders and evaluating each one's activity. For the study purposes representatives of Greek diving industry's groups of stakeholders were interviewed. Data were analysed by using the QSR NVivo qualitative computer software programme. The results showed three thematic sub-categories that they are discussed: (1) Greek diving industry's potential, (2) valid legal framework and (3) Greek diving industry's development capabilities. It is concluded that the perspectives of diving tourism growth in Greece are excellent.

Key words: Diving tourism, stakeholders, potential divers, leisure diving, diving parks

INTRODUCTION

Diving tourism is a rapidly developing sector at the global level. Every year, a great amount of currency is being transferred mainly to onshore countries and specifically to those demonstrating a significant underwater environment, rich in marine life (natural landscapes, variety of aquatic animals and plants, underwater caves or volcanoes, etc.) (Hall and Page, 2005; Alban *et al.*, 2008; Peters and Hawkins, 2009). Some countries' national income (e.g., Malaysia) greatly depends on the diving industry, whereas other (such as Malta, Egypt, Maldives, Turkey etc) benefit from this type of tourism regarding the currency inflow (Uyarraa and Côté, 2007; Garrod and Gossling, 2007). Therefore, a lot of countries make any possible effort to exploit their natural environment in order to attract visitors and thereby enjoy the benefits of the international diving market. Worth mentioning is the fact that a great number of individuals and corporations are involved in the diving industry offering a variety of products and services for an increasing number of clients (Arin and Kramer, 2002; Lynch *et al.*, 2004; Jennings, 2006; Bell *et al.*, 2008).

Leisure diving activities are of great appeal to young people; that can explain why countries lacking sea, such as Switzerland and Austria, demonstrate a significant rise in diving clubs, diving learning centers and other forms of organized tourism (there are 50 diving clubs in Austria

and 100 in Switzerland (Van Treeck and Schuhmacher, 1999; Jennings, 2006). The European Union has to deal with the problem of currency leakage to non-European countries since a significant number of diving destinations, which attract the European amateur divers, are located outside the European Union's borders. One reason for the poor marine landscape of many European onshore countries lays on exceeding fishery. However, the underwater environment of many European countries though different from the tropical, demonstrates significant beauty with a variety of marine plants and fascinating aquatic animal species (Van Treeck and Schuhmacher, 1999). Due to the favorable climatic conditions in Greece along with the rocky underwater environment (which particularly attracts divers because of its interesting formations such as caves, gorges etc.) there is a great potential for leisure diving exercised systematically for an eight month period at least, every year, taking also advantage of the country's abundant cultural tradition and inheritance, the history, the landscape as well as the great length of the country's coastline (15.021 km). Therefore, Greece can truly become a diving paradise for both amateur and professional divers making thus the need for diving industry's development absolutely necessary (Dikou and Troumbis, 2006; Oikonomou and Dikou, 2008).

The abovementioned problem lays on the absence of a precise evaluation of the local diving industry and the

stakeholders' interaction. A person wishing to launch a new business in the diving sector has no clear picture about the number and kind of stakeholders nor the extend of their influence. In addition, there is no clear picture of the bureaucracy arising or the legal framework surrounding the industry. Therefore, the present study attempts to map the current state and the developing potential of diving tourism in Greece, through the identification and salience of the Greek diving industry's stakeholders.

MATERIALS AND METHODS

The study undertaken by the Department of Sport Management, Faculty of Human Movement and Quality of Life, Peloponnese University, Sparta, Laconia, Greece. It started in January 2006 and finished at the end of December 2008.

Participants: After informed consent in the study participated fifteen subjects, who were representatives of Greek diving industry's groups of stakeholders (Greek National Tourism Organisation, Hellenic Chamber of Hotels, Local Administrative Authorities, Ministries in co-charge, Hellenic Centre for Marine Research, Hellenic Federation for Underwater Activities, Sports Fishing and Fin Swimming, Diving Training and Certification Organisations, Diving Equipment Suppliers). The subjects were in the aforementioned positions 5±2.3 years.

Collection of data: In order to collect the data of the present study a qualitative approach as interview was used. This was useful in the explanation of phenomena of interest and discovering the way of entanglement of immediately interested institutions in the process of decision-making from organisms and companies that attempt in the diving tourism in Greece. The qualitative data by interview process permits the researchers to

investigate in depth the nature of a phenomenon (Neuman, 2003; Tenenbaum and Driscall, 2005; Creswell, 2008). The interview questions were developed based on bibliography relevant to the study's subject (Table 1). The interview process copied in an audio tape word by word and then sent to the subjects to confirm the content of their answers.

To reduce interviewer bias, the interview questions were honed to follow a more general protocol, where the participants were able to express their experience and knowledge. The questions were reviewed by an expert panel consisting of professionals and governmental officials with experience and/or authority on diving tourism, diving in general and governmental policy in this sector.

Statistical analysis: A qualitative computer software programme (QSR NVivo) was used to manage code and systematically analyze the data. Specific procedures were used during the analysis including three basic types of codes: open, axial and selective. Open coding resulted in the formation of categories based on discrete units (e.g., paragraphs, sentences, words). In each unit a label was given which represented the phenomenon observed (Kabitsis, 2004).

RESULTS

The results showed three important thematic sub-categories: (1) Greek diving industry's potential (2) Valid legal framework and (3) Greek diving industry's development capabilities. Each category consists of a number of affairs which are either given special attention by the interviewees or consist points of agreement among them thus indicating, the affairs that have to be taken into consideration and account in any further attempt of scientific contribution to the Greek diving tourism's development.

Table 1: The interview

A/A	Question
1	What is your opinion for the growth of diving centres with international specifications? What is your opinion regard to the new legislative frame for the diving (problems, ambiguities)?
2	What is your opinion for the growth of diving centres with international specifications?
3	What is your opinion regard to the new legislative frame for the diving (problems, ambiguities)?
4	In your opinion which are the institutions that involved in the space of diving tourism?
5	In your opinion which are the institutions that involved in the space of diving tourism?
6	What is your opinion for the work, which runs by the involved institutions that are related with the diving activity (positively - negatively)?
7	What is your opinion about the institution strength that you represent in order to influence substantially the growth of diving tourism in our country? Explain the reasons?
8	Rate and evaluate the involved institutions accordingly to the strength that has to influence the developments in the area of diving tourism? Explain?
9	Evaluate the institution appropriateness that you represent which involved in the sector?
10	Rate and evaluate the involved institutions according to the appropriateness of the contribution in the areas of activity of diving tourism. Explain your opinions for each institution?
11	How immediately do you believe that the sector should correspond in the claims-needs and demands?
12	How immediately do you believe that the sector should correspond in the claims-demand-needs that state all the rest of the institutions?
13	You add freely any other information you believe that it is related with the subject of diving tourism?

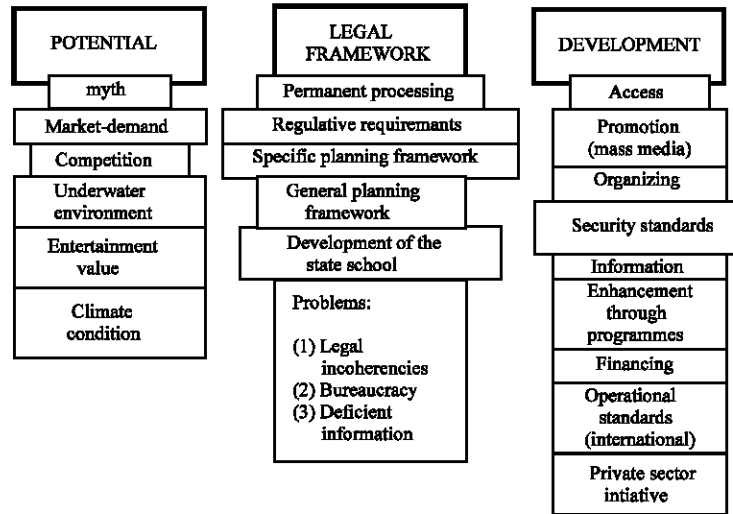


Fig. 1: Diving industry’s state of affairs

The first thematic category consists affairs such as potential, myth, market demand, competition, underwater environment, entertainment value and climate conditions, the second thematic category consists affairs such as legal framework, permanent processing, regulative requirements, specific planning framework, general planning framework, development of the state school and different problems and the third category consists affairs such as development, access, promotion, organizing, security standards, information, enhancement through programmes, operational standards and private sector initiative (Fig. 1).

DISCUSSION

The present study focused on the mapping of the diving industry and functions as a start up point for further, more in depth evaluations, of the two remaining categories under investigation which will be examined in the next phase of the research, focusing on the identification of the stakeholders, the roles they play and their evaluation.

The Greek diving industry’s potential: Regarding the Greek diving industry’s potential and development capabilities, significant reference is made to the role of local mythology as an important element of the industry’s potential which can attract potential divers by aiming mainly on their temper. The concept of myth is considered to be a comparative asset for the country and it’s region which could make significant difference when the Greek diving industry will try to compete with other international diving markets on the same terms of operational standards

and management. Greece’s profound position in the Mediterranean basin, a sea which has been integrating human presence and activity from the ancient years, along with the country’s cultural and marine history where peoples’ interaction with the sea played a significant role, are all assets which must be properly exploited within the process of the Greek diving industry’s development and promotion. By studying the examples of other famous diving destinations, it is realized that great effort is made towards the maximum exploitation of the local cultural history aside from the exciting natural environment which most of the times stands as their significant benefit. Therefore, in the Greek diving industry case the above mentioned factor is expected to play a vital role. This could be done through the application of a strategic plan which would introduce visitors to the country’s history, culture and tradition in a manner of substantial knowledge and living experience instead of a short-term tourist policy plan.

Another factor being mentioned by the interviewees in regard to the diving tourism’s potential has to do in particular with the demand for product. As it has been previously mentioned and even attested by relevant data, leisure diving has met significant rise in the recent past both in international and European level but in local level as well as it can be proved from the increase in the number of diving centers and diving services providers in Greece during the last years. Data were also provided regarding a rise in diving tourism figures in particular, as a result of increased occupation in leisure diving activity. Additional data also explain how this rise is translated into financial terms for the countries engaged in this industry. It is thus concluded that the increased demand for leisure diving cannot be perceived apart from the competition affair.

According to the interviewees, competition with countries which demonstrate an established diving market along with high rate of penetration in the organized diving tourism market, could possibly favor the development of the Greek diving market since it will force the local stakeholders to act and furthermore compete with other countries by setting even higher standards and offering better diving conditions. In their effort to apply a dynamic competition policy the local stakeholders should not only care for the assurance of the highest quality in all services provided but for the sufficient promotion of diving tourism on local level, using all possible merits.

The country's underwater environment is considered to be an important asset by the interviews and it is also evaluated as point of significance for the local diving market's potential. Beyond the natural underwater environment itself, its' exceptional morphology and its richness in aquatic plants and animals, special notion is given to the plethora of older and newer shipwrecks. Under certain conditions, these shipwrecks could form excellent destinations for organized diving excursions or to even be exploited through the creation of diving parks.

The diving park concept which according to Markatos and Éoutsis (2008), forms a Greek innovation as it is not encountered in the relevant international bibliography, it is however stated by many interviewees as an important factor of the local diving market's development based on the respective examples of Marine Parks or Marine Protected Areas to accurately speaking. Suggesting the establishment of diving parks as a dynamic tool for the sector's development, lays in perfect connection with the enforcement of law 3409/2005 for leisure diving. By paying attention to the international trends and the recent scientific views, the newly enforced law introduces, to begin with, the possibility of creating and operating such venues within the boundaries of the Greek State. However, the establishment of such venues is a complicated issue which involves a series of other partial issues which are to be indicated and commented on, further below.

Besides the rich underwater environment special notion is given to the country's geophysical characteristics with the great coastline and the abundance of islands to be the most prominent. In any way, the underwater terrain usually bears great similarity to the shoreline. Furthermore, in a country such Greece with the great number and variety of coasts and beaches along with friendly waters, sea activities of all kinds are highly appealing to both local and foreign visitors. The diving market could thus take advantage of this kind of intention by offering people the motives needed and introduce the diving experience to them, as a new exciting sea activity.

Diving's entertainment value is also underlined by the interviewees in relation to the market's potential. If diving activity is properly organized and offered to the public as an alternative type of entertainment providing at the same time learning, education and environmental awareness it could easily find a place in the schedule of visitors who probably hadn't even thought of such an activity during their holiday reaching thus the most crucial target group: the potential amateur divers.

Greek diving tourism's potential is also reinforced by the favorable climatic conditions. Besides being an attraction itself, Greece's temperate climate is considered to be a crucial element for the development of tourism in general, as it favors the inflow of visitors and helps the extension of the tourist season. Temperate climate conditions which are interpreted into nice temperatures and long periods of sunshine along with the absence of intense or severe climatic phenomena usual in other countries could indeed provide for satisfactory inflow of visitors all year round.

Greece is an established visiting destination on both European and International tourist maps and that is one of the country's greatest advantages. Although being a small country, it demonstrates a great number of visiting areas and resorts especially on the islands and other regional areas. The above mentioned could easily provide ground for the diving market's development through the implementation of an incorporated and targeted strategic plan.

Research of certain products and services market's potential, consists the first step towards the implementation of any strategic plan which is followed by the research of capabilities given or allowed by the institutional framework surrounding the relevant market. During this survey the interviewees were asked to comment on the new legal framework for diving in Greece and to evaluate all positive and negative aspects of it along with it's influence on the Greek diving industry.

New legal framework: Reinforcement of law 3409/2005 (Georgiadis, 2004), about diving, is generally evaluated as a positive action on diving, since the new law amended lot's of gaps and incoherencies found in previous relative legal context. The innovations that were brought about by the new law are judged as quite significant for the enhancement and further development of the diving sector and the removal of all obstacles that both amateur and professional divers met.

The opening of the diving sector is considered to be the new law's greatest asset as the previous bans are now lifted and diving is only prohibited in areas were shipwrecks over 50 years old are located.

The latest law's reinforcement emerged from the need for further development of the Greek diving market and tourism. A new legal framework was needed which would not only enhance this lucrative tourist market but also care for the country's cultural inheritance through the protection of submarine antiquities and the underwater natural environment, by setting certain standards for its sustainability.

Law 3409/2005 provides for a general executive resolution of the Minister of Environment which will specify the qualifications needed along with all terms and conditions for the establishment and operation of diving centers. Following that, issuing of common resolutions of the above mentioned Minister and the Minister of Mercantile Marine is provided (article 1, law 3409/2005) for the final characterization of each marine park established.

The above mentioned Ministerial Resolution has not yet been issued. Bureaucracy is not the only one to blame for this delay. As Markatos and Êoutsis (2008) state, before setting the standards for the establishment and operation of diving parks an inter-scientific perspective is required, along with political decision-making upon a series of respective issues which inevitably rise questions to the interviewees participating in the present study.

With refer to their time-duration, one could claim that diving parks are forever. Of course due to legal, financial and political reasons any rental contract made has to have certain time limitation. The above stated however concerns the sequence of administrators and not the diving park itself as a venue.

As far as the total number of diving parks is concerned, granted that the environmental annoyance caused by their operation is minimum one could ask for a non area-restrictive establishment of diving-parks provided that the local community consents and no conditions of unsuitability are present (e.g., areas of hazardous pollution, ship routes etc.).

With regard to their geographical planning, diving parks could, or even should be created within broader zones of National Marine Protected Areas where leisure diving is allowed. This could benefit the MPAs' in a double manner: on one hand it would reinforce their protection through the marine parks' private security guards and on the other hand the nearby local communities could seek economic profit from tourism as a compensative benefit to fishery restrictions.

The multi-shareholder private sector's management scheme, seems to be the most appropriate for the occasion, having as shareholders local investors, especially from the broader tourist market. However, local administration's participation is also required under beneficial conditions which will ensure free shares, fixed

rate in depended by any stock rise and the right to appoint their representatives in the park's administrative board. A scheme like this ensures active participation and discipline of local private powers regarding the park's protection along with transparency and updated, prompt information of the local community about the park's administration and operation.

In any case, even in the case of public or municipal diving parks, it is better advised for the managing authority running the park to base itself on private finance criteria, as it has been proved that only in this way finance-viability can be achieved along with the park's sustainable preservation and protection.

State control for the legitimate establishment and managing of the park according to terms and regulations enforced by the law and the aforementioned Ministerial Resolution should be the task of skilled professional divers, as the usual Coast Guard's control from the surface is not deemed sufficient enough in this case. Therefore, either a new controlling body has to be established within the Hellenic Coast Guard or special scientific authorities such as the Hellenic Centre for Marine Research has to be in charge of diving parks' control. State control as hereby mentioned, aims at the protection of the natural environment and the administrator's compliance with the rules set by the contract and the overall legislation.

Development potential: Regarding Greek diving tourism's development potential the findings of the present research prove that the stakeholders' representatives who took part in the survey agree upon and emphasize on a series of issues which consist matter of debate in the relevant bibliography (Francour *et al.*, 2001; Jameson *et al.*, 2002; Markatos and Êoutsis, 2008; McLean, 2009).

Findings prove that diving industry in Greece is erroneously oriented merely on the matter of expenditure, lack of business criteria and absence of strategic planning along with a tendency of detachment from any kind of competition. Incapability of predicting and ensuring viability of projects in the industry it is also observed mainly due to lack of marketing plans ensuring the continuous financial inflow needed for such projects.

With regard to the financing and the private initiative which are both indicated by the interviewees as crucial factors for diving tourism's development, Kelleher and Kenchington (1992), states that boost of private initiative, adoption of private sector's criteria and greater involvement of local communities and non-governmental organizations, comprise the only means of succeeding financial autonomy and viability staying thus away from state financing.

Additionally, the income from the visitors' tickets, always in connection with the great rise of interest in diving globally, could also secure diving centers viability and lead to their independence from state subsidy. The Medes Islands Marine Protected Area in Catalonia, serves as an example of the abovementioned. Thanks to the strategic operational plan applied, this marine park has succeeded financial autonomy and viability contributing at the same time to the local economy in cooperation with the local community.

Based on the findings of research analysis and relative scientific views (Markatos and Êoutsis, 2008), it is suggested that the concept of a small Marine Protected Area (diving park) combined with divers inflow, could ensure financial, operational and institutional sustainability for diving tourism in Greece.

Regarding the matters of underwater environment's protection by any kind of harmful intervention (exceeding fishery, pollution, antiquities detachment), accessibility and application of security standards and regulations, private initiative-based development of diving parks which significantly differ from the existing on terms of services provided and uniqueness of the sea bottom (exquisite Greek underwater landscape), could provide for the unhindered development process of the Greek diving industry.

The matter of accessibility is considered by the interviewees to be of great importance for the development of Greek diving tourism. With regard to accessibility in areas of diving activity, Georgiadis (2004), state that diving parks do not exclude any local or foreign visitor. On the contrary, they set (legally and constitutionally justified) restrictions of compliance with the rules of operation as it is usual in all areas of organized visits.

Concerning the matters of management, financing, private initiative and development supporting programmes, the results derived from this research study, agree with Francour *et al.* (2001). They support the establishment of a national network of small sufficiently protected marine areas in the shape of financially autonomous and viable diving parks, which allow experimenting with any kind of public, private or even mixed initiatives on finance and administration. In other words, the above mentioned scheme, allows the mobilization of all political, social and financial powers within the framework of greater stakeholders' interaction in the diving industry.

Regarding the findings related with the diving market's development through European Support Programmes, Markatos and Êoutsis (2008), suggest the expansion of the networking model for diving parks in the

Mediterranean Basin. This suggestion coincide with the views of the basic representatives of the diving industry's development (who participated in this research), as the only realistic and applicable model for substantial intervention and interception of any declining process (financial and environmental) in the broader region.

The interviewees highlighted the important role of the Mass Media for the target groups' awareness and the promotion of diving tourism in Greece. It is thus becoming obvious that a strategically targeted promotional campaign could give Greece the chance to extend it's tourist season to all year round. Either way winter time in the Mediterranean equals the Northern European summer and there is a great market of quality tourism that Greece could attract through this kind of alternative tourism. What the country needs it to "open" it's diving market and the sea and to successfully promote this tourist product abroad by stressing all of it's unique advantages.

At the same time, for the best protection and promotion of the Greek submarine antiquities, underwater archeological parks could be established. By paying the relevant admission fare, people could visit the submarine ancient treasures in the same way they visit Acropolis. In these parks, experienced archeologists who are also divers, could guide the visitors and watch over them during the dive, offering thus, a great source of income for the Antiquities Service. Such projects have been applied in the area of Bodrum, Turkey and in Alexandria, Egypt. Finally, diving cruises which are very popular abroad, could easily operate in Greece, taking thus advantage of the country's numerous island complexes.

The present study was the first trial that explores the current of diving tourism in Greece. No other studies investigated similar affairs.

CONCLUSION

The perspective of the diving tourism growth in Greece has many advantages. It is a safe country, a member of European Union and it allocates the same currency with European states. Greece has an excellent climate, big marine life and morphology, where the fishery is limited. More, it is a very near destination for the European travellers.

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