

FIELD RESEARCH REPORT · BALI, INDONESIA

Rethinking DiveTourism

Field insights based on 100+ surveys and direct conversations with travelers, snorkelers, divers, and dive professionals in Bali.

Conducted at the Padang Bai ferry terminal and nearby dive centers.

100+
conversations

90%
awareness

~89%
exp

~12%
existed

~46%
Willing to pay €25–
30

— METHODOLOGY

How the research was conducted

The research combined quantitative and qualitative approaches conducted over several weeks in Bali, targeting active marine tourism participants across multiple locations and interaction formats.

— RESEARCH LOCATIONS

- Padang Bai Ferry Terminal
- Puri Rai Restaurant
- Topi Inn
- Billabong
- Dive boats & snorkeling departure points

— RESEARCH METHODS

- Direct traveler surveys (100+)
- Interviews with Dive Professionals
- Informal field conversations
- Behavioral observations
- Snorkeler in-water interactions

— BEHAVIORAL ANALYSIS

Awareness is high. Action is not.

Environmental topics — **coral reefs, plastic pollution, ocean degradation** — were mentioned spontaneously in most conversations. Awareness is not the problem. The gap lies between caring and knowing how to act within holiday constraints.

Interest exists, but remains passive. Only ~46% say they would actively take time during their trip to help the environment. Only ~46% say they would participate in activities that improve a place. Strong gap between what people say and what they are actually willing to do.

THE "HOLIDAY MINDSET" — CLEAR BEHAVIORAL PATTERN

— What people say (awareness)

- ~90% care about the environment
- They want to be responsible
- They are interested in conservation
- Coral reefs, plastic, ocean mentioned spontaneously

— What they do (action gap)

- They are in transit
- They follow a fixed itinerary
- They don't want to change their plans
- Less than half are ready to act during their trip

A strong gap between awareness and action.

Over several weeks, a comprehensive quantitative and qualitative field study was conducted in East Bali (Padangbai). The primary objective was to evaluate public perception of marine conservation, identify the psychological and logistical barriers to environmental action, and assess the economic viability of the Livingseas coral restoration activities.

Data was gathered from two distinct target groups:

Transit Travelers: Surveyed at the Padangbai Ferry Terminal (heading to Lombok and the Gili Islands).

Divers & Professionals: Interviewed directly within local dive centers and at boat departure points.

The objective was to better understand: traveler environmental awareness, interest in meaningful experiences, barriers to participation, and the potential for coral restoration experiences integrated into tourism activities.

The results reveal a strong contradiction between awareness and action. While most respondents care about environmental issues, only a minority actively seek opportunities to contribute during their holidays.

However, once coral restoration is explained clearly, interest increases significantly.

Four numbers that tell the story

90%

Think about their
environmental impact while
traveling

89%

Are interested in meaningful
travel experiences

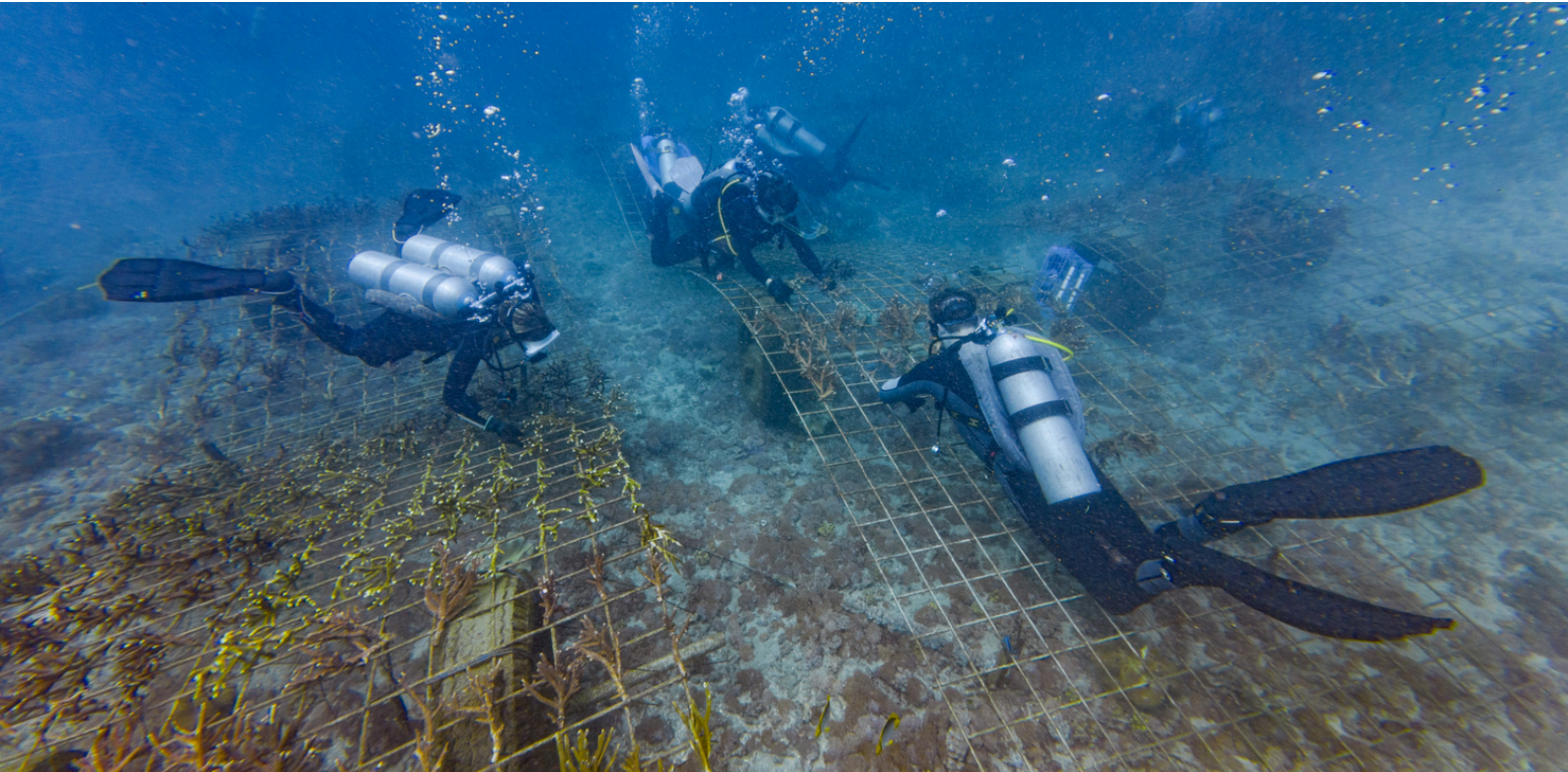
12%

Knew coral restoration
existed in Padang Bai before
being informed

55%

Would actively dedicate
time to environmental
activities during their trip

Although 90% of travelers are eco-conscious and 89% are seeking meaningful experiences, only 46% would be willing to take action, a gap heavily widened by the project's low local visibility (only 12% prior awareness).



— MAIN BARRIERS TO PARTICIPATION

01 **Lack of time — dominant barrier**

Travelers are in transit, follow a fixed itinerary, or don't want to change their plans. Even when interested, they prioritize comfort, time, and enjoyment. This is the #1 limitation observed in the field.

02 **Lack of information — critical barrier**

Only ~12% knew about coral restoration in Padang Bai. ~35% explicitly mention lack of information as a reason for not participating. People are interested — they simply don't know it exists.

03 **Need for simple, accessible experiences**

Short, hands-on activities integrated naturally into existing travel activities — not separate programs added on top of existing itineraries.

Strongest Opportunity

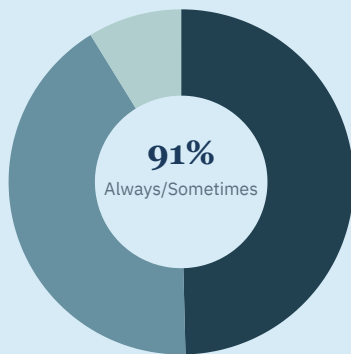
Short, hands-on conservation experiences integrated seamlessly into existing dive and snorkeling trips. The study highlights a strong opportunity for dive centers and marine tourism operators to develop meaningful experiences linked to coral restoration and ocean conservation.



— SURVEY RESULTS — 4 CORE QUESTIONS

Environmental awareness vs. active participation

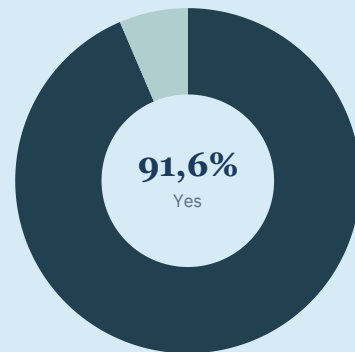
DO YOU THINK ABOUT YOUR ENVIRONMENTAL IMPACT WHILE TRAVELING?



- Always
- Sometimes
- Never

49.6%
41.6%
8.8%

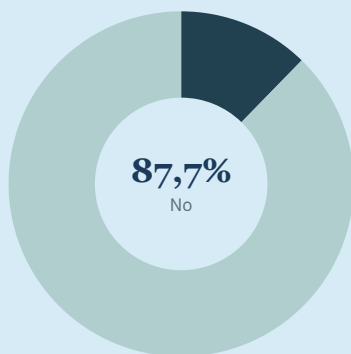
ARE YOU INTERESTED IN MEANINGFUL TRAVEL EXPERIENCES?



- Yes
- No

91.6%
6.3%

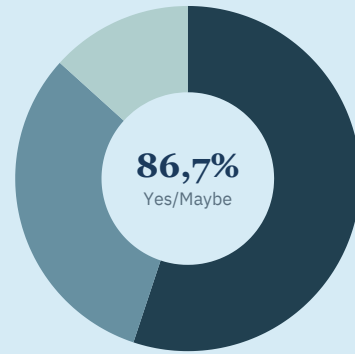
DID YOU KNOW CORAL RESTORATION EXISTED IN PADANG BAI?



- Yes
- No

12.3%
87.7%

WOULD YOU DEDICATE TIME TO ENVIRONMENTAL ACTIVITIES DURING YOUR TRIP?



- Yes
- Maybe
- No

55.1%
31.6%
13.3%

— UNDERSTAND THESE RESULTS

These four charts provide clear data on traveler psychology and highlight a major strategic opportunity for the Livingseas Foundation. The first two charts show that environmental awareness is not the problem. With 91% of respondents thinking about their environmental impact and 91.6% looking for meaningful experiences, there is already a huge, deeply interested market for sustainable tourism in Bali. Travelers do not need to be convinced that the oceans are in danger or that coral reefs need saving; they are already sensitive to these issues.

However, the third and fourth charts reveal the real challenge. Even though 86.7% of people say they would be willing to dedicate time to environmental activities during their trip, a massive 87.7% of them had absolutely no idea that a coral restoration project existed in Padang Bai. This proves that the number of participants in our Coral Restoration Snorkel Tour is not caused by a lack of interest, but by a lack of visibility. People want to help, but they simply do not know that Livingseas is right next to them.

For the organization, this data is useful because it changes our entire marketing approach. It proves that we do not need to spend time or money to create demand, because the demand already exists. Instead, we must focus all our efforts on communication and distribution. We need to fix this information deficit by making our project highly visible.



We need to make sure that travelers know Livingseas and the coral restoration site before they arrive—that is, when they're planning their trip. Because if people only hear about Livingseas once they arrive in Padangbai, it's often too late to change their travel plans.

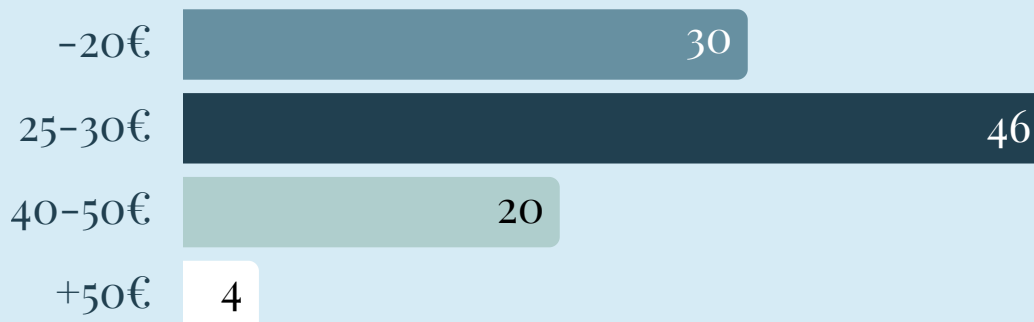


— WILLINGNESS TO PAY — SECTION 5

A real and structured market signal

The most critical insight from our field research is a clear "Pricing Gap" between what transit travelers expect to pay and the actual price of Livingseas' primary retail product: the Coral Restoration Snorkel Tour.

WILLINGNESS TO PAY — CORAL RESTORATION EXPERIENCE



As our study shows, most travelers would be willing to pay between **€20 and €30** for this type of activity. This is not really surprising, as these are the prices typically charged for most snorkeling excursions. Currently, the price for a snorkeling tour with Livingseas is \$40, or €34. This difference between the current price and the price tourists expect can be offset by the **ecological and meaningful** nature of the experience with Livingseas rather than with another provider.

+100€

In direct conversations, divers stated they would pay more than 100€ for a meaningful dive experience.

When it comes to diving, respondents are willing to pay an average of over €100 for meaningful dives, which is roughly in line with our prices (around \$135, or €115).



— SECTION 7 — DIVER-SPECIFIC INSIGHTS

Certified divers — a high-conversion segment

Compared to general travelers, divers show a higher level of engagement once the topic is introduced. The segment splits clearly into two distinct behavioral profiles.

Beginner Divers

Open Water / first dives

- Primarily focused on enjoyment and discovery
- Limited awareness of coral health and restoration processes
- Typical reactions: "nice fish", "beautiful dive"
- Lower prior knowledge of reef degradation
- Less concerned — focused on the experience itself

Certified / Experienced Divers

Advanced & regular divers

- More aware of coral bleaching and reef degradation
- More receptive to environmental discussions
- Coral restoration largely unknown prior to explanation
- More likely to notice reef conditions and ask questions
- Willing to pay \$100+ for a more meaningful experience vs. a standard dive

— SECTION 8 — DIRECT DIVER INTERACTIONS

In direct conversations with divers at dive centers, **several expressed strong interest** in participating in coral-related activities and said they would like their dive center to offer this type of experience. In one group interaction, divers stated they would be willing to **pay an additional 100 USD or more** — they clearly perceived the difference between a standard dive and a meaningful experience.

— SECTION 9 — DIVE GUIDE INSIGHTS

Feedback from dive guides remains limited but consistent — no major change in expectations initially mentioned. However, when prompted, guides confirm that clients are **increasingly aware of environmental issues**. Some guides highlighted that beginner divers are less concerned, as they focus on the experience itself, while more experienced divers are more likely to notice reef conditions and ask questions.

The biggest single opportunity

Only ~12% knew about the restoration site before being informed

But once explained: interest increases immediately, people react positively, and many say they would have participated. Demand already exists, but is not activated.

Lack of information explicitly cited as the reason for not participating

Key insight: People are interested, but they simply don't know it exists. This is a visibility and distribution problem, not a product problem.

Interest rises significantly when restoration is explained clearly

Once explained: interest increases immediately · people react positively · many say they would have participated.

— SECTION 10 — KEY OPPORTUNITY FOR DIVE CENTERS

Travelers are aware, interested and willing to pay.

These results highlight a clear opportunity. Travelers are aware · are interested · are willing to pay. **But they need: visibility · simplicity · easy integration into their trip.**

— STRATEGIC RECOMMENDATIONS

Embed, don't add

Design conservation as a half day module inside existing dive trips. Travelers want fun and impact simultaneously — not as alternatives.

Point-of-decision visibility

Place materials at ferry terminals, dive center check-ins, and boat briefings. ~35% cited lack of info as their primary barrier.

Train dive center staff

Brief guides on a simple "explain and invite" script. The conversion happens in conversation — once explained, interest increases immediately.

Price for accessibility

Keep entry-level experiences at ~€25–30. The largest pricing cluster confirms this range removes the "not for me" psychological barrier.



— CONCLUSION

This research highlights a clear opportunity for meaningful marine experiences in Bali. Travelers and divers are already highly aware of environmental issues and many express strong interest in activities linked to coral reefs and ocean conservation. However, the study also reveals an important gap between awareness and action, mainly due to lack of time and lack of information.

The most important finding is that demand already exists. Once coral restoration is explained clearly, reactions become immediately more positive and many respondents say they would be interested in participating. Divers, especially more experienced ones, also show strong interest in meaningful and hands-on experiences connected to the ocean.

Overall, the challenge is therefore not to create interest, but to make these experiences more visible, accessible and naturally integrated into existing tourism and diving activities

*The challenge is not to create demand.
The demand already exists.*

Make the experience visible · Make it easy to access · Integrate it naturally into what travelers are already doing.

— ABOUT LIVINGSEAS FOUNDATION

Livingseas Foundation operates the largest coral reef restoration project in Bali, combining scientific rigour with accessible tourism experiences — proving conservation and commerce can accelerate together.

As of May 2026, **432,588 coral fragments planted, 8,824 reef structures deployed, 8,550m² of seabed revitalized** in Padang Bai's Amuk Bay.

432 K
Corals planted
8,824
structures deployed
8,550 m²
seabed revitalized