

Diving in the Future update 2014

Dipl.-Ing. Dr. Wolf-Dieter Mell

By order of
Tauchsport-Industrieverband (tiv)



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Forschungsvereinigung für die Sport- und Freizeitschiffahrt e.V. (FVSF)

**Gunther-Plüschow-Strasse 8
50829 Köln**

Tel.: (+49) 221 - 59 57 10

Fax: (+49) 221 - 59 57 110

E-Mail: info@fvsf.de

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Executive Summary

The first survey among divers (“Diving in the Future”) carried out in 2009 by the “Forschungsvereinigung für die Sport- und Freizeitschiffahrt (FVSF)” and commissioned by the “Tauchsport-Industrieverbandes (tiv)” has been repeated with an extended questionnaire in 2014. The following statistical analysis is based on the return of 1'092 responses.

As already done in 2009 the questionnaires has been transferred into a representative structure and extrapolated to a real number of divers by comparing with actual basis data (such as number of trainings 2012, 2013) using correcting factors.

In the summary distinction is made between “Scuba Divers” with an own complete diving equipment (warm water or cold water suitable) and “Leisure Divers” without own diving equipment or with a partial diving equipment.

The extrapolation results for 2014 the following **stock of active divers**:

- Scuba divers: about 177'000 (2009: 190'000)
- Leisure divers: about 229'000 (2009: 230'000)
- Total: about 406'000 (2009: 420'000)

Due to the demographic change, the aging structure of active divers shifted since 2009: less young divers under an age of 45, more old divers over 45.

Exemptions:

Many female divers take a family break between the age of 25 and 40, after the age of 50 they give up diving completely. At the “Leisure Divers” (without own diving equipment) a disproportionate increase in older divers could be observed, suggesting a reactivating of former inactive divers.

The most divers get their **initial training** between 15 to 35 years. At present around 40'000 German divers get their initial training per year, half of which remain active divers on medium-term. The exit rate of this group is approximately 5% per year. It is to be expected that due to the demographic decline of the age group 15 to 35 the yearly initial trainings will decline also in the coming decades.

In 2014 the **number of dives** of “Leisure Divers” (unlike in 2009) is almost as large as those of the “Scuba Divers”. In parallel, the **training level** of the “Leisure Divers” increased since 2009. As “Leisure Divers” do not have an own equipment it can be assumed that they practice their hobby mostly in warmer diving areas.

Queried and evaluated were in the light of Cross Marketing **hobby and leisure activities**. As expected, clear differences exist in preferences not only between men and women but also between the age groups. Most popular are sports. Swimming and biking are most popular at divers. 7 % of the divers, especially young men, are active in rescue services (DLRG, fire brigade, etc.).

The internet is the most often used **information channel** for the hobbies, followed by the circle of friends and the club. The professional journals and fairs reach more likely the “scuba diver” than the “Leisure Divers”.

When **selecting the diving spot** the typical aspects for diving are richness in animal and fish, flora and fauna, water quality and visibility of water. At the infrastructure “Leisure Divers” ask for filling station, resting area, and “Leisure Divers” ask mainly for rental equipment. Especially women ask for toilet/showers, medical care, cleaning area, and changing rooms.

The most frequently (by half of the divers) mentioned **factors that would make diving more attractive** are “a useful task at diving” (such as an active role in aid organizations, scientific work, etc.). Almost half of the male “Leisure Divers” would like to see further “comfort at the spot”. More than half of the female “Leisure Divers” would welcome organized diving trips.

Since 2009, the **financial input for diving** changed extremely especially at “Leisure Divers”:

Both the **values of the owned diving equipment** (2009: € 230, 2014: € 500) and the yearly expenditures for courses and training (2009: 100 €/year, 2014: 200 €/year) doubled.

The **yearly cost for diving trips of “Leisure Divers”** increased since 2009 (on average 200 €/year) to an average of 1'100 €/year and so it is nearly as high as the respective costs of “Scuba Divers” (2014: on average 1'900 €/year).

This confirms the tendency of a reorientation at “Leisure Divers”: Less time to time diving in home water, instead traveling without own diving equipment to warm and attractive diving regions, comfortable vacations, rental of equipment on the spot, and intensively diving.

The **prospects for the future** on the number of German divers did not change since 2009:

Even if about 1 % men and around 0.6 % women of a year group can be motivated to diving the number of divers will decline by 1 % per year due to the demographic change within the coming 20 years. Of considerable importance is it how many beginner (of the age group 15 to 35) can be gained per year and what proportion of beginners can be bind to diving on long-term base.

1 Questionnaire Survey, Response Rate

Having a first survey upon divers to the state of diving in Germany carried out by order of the Tauchsport-Industrieverband (tiv) in 2009, the 2014 survey was extended through a revised questionnaire. Again, we started two actions started in parallel with identical questionnaires:

- Written form of questionnaire in the diving shops and at fairs
- Online questionnaire at the home page <http://www.tauchsportindustrieverband.de>

The revised questionnaire of 2014 includes the following 16 categories of queries:

1. Residence
2. Year of birth
3. Gender
4. Family status
5. Year of first diving instruction
6. Status of education today
7. Type of equipment owned
8. Number of dives in total, 2013, planned for 2014
9. Year of last dive
10. Additional hobbies
11. Intensity of exercise of various leisure activities
12. Use of information channels on the subject of hobbies
13. Selection criteria of diving spots
14. Factors that would make diving more attractive
15. Value of current diving equipment
16. Average of annual invest for diving trips, courses and further training, diving equipment

Response rate and recording until Feb. 24, 2015, of these checked for completeness and included:

	<u>Returned</u>	<u>Analyzed</u>
• Written questionnaires:	166	156
• Online questionnaires:	926	881
Total	1'092	1'037

For comparison: data of survey 2009:

• Written questionnaires:	243	
• Online questionnaires:	629	
Total	872	850

Note:

As in the survey in 2009, the share of incomplete questionnaires was again remarkably low in 2014. This should be considered as a quality feature.

The following survey results are mainly tables and graphs with short comments and remarks.

2 Extrapolation of Collected Statistics to Real Figures

The following reference data were disposable to survey the representativeness objective to an extension of the result in real quantity:

- Particulars to age and gender of first-time education of multiple training centers in 2012 and 2013
- Additional estimates of the market shares of this data
- Summarized sales data of German diving companies for 2012 and 2013
- The analysis results of 2009

When comparing results structure in relevant factors (such as distribution by age and gender as well as by type of equipment) of the online survey as well as the written survey showed a broad consensus so that both surveys could be evaluated together.

A comparison of the structure in age and gender of participants at initial training in 2012 and 2013 between the surveys and the figures of the training facilities shows

- Being a slight predominance of male participants to the survey
- Being a with the age rising underweight of older divers (> 55) as well as an underweight of younger divers (< 25) to the survey.

These imbalances could be compensated for projection purposes by appropriate correction factors per survey. In structure and size, the correction factors corresponded very well to the evaluation factors of the survey in 2009.

The calculation of the volume factors (ratio between real volume and the corresponding number of corrected cases) bases on the following information:

1. The information provided by the training organizations and the comparison of results from 2009 showed that worldwide there are still
approx. 40'000 German divers per year who get an initial training.
2. The following report distinct between
"Scuba Divers" (with own equipment)
"Leisure Divers" (without own equipment).

Participants of this survey are classified "Scuba Diver" if they stated to own a complete diving equipment (suitable for warm water or cold water).

Participants of this survey are classified "Leisure Divers" if they stated to own no complete diving equipment or to be partly equipped.

As these persons participated in the survey, it is assumed that they visit specialist diving shops and that they are active divers.

Not recorded in this survey are “Infrequent divers” with an initial training who presumably do not own a noteworthy equipment, do not buy at diving shops but make use of diving offers on holiday.

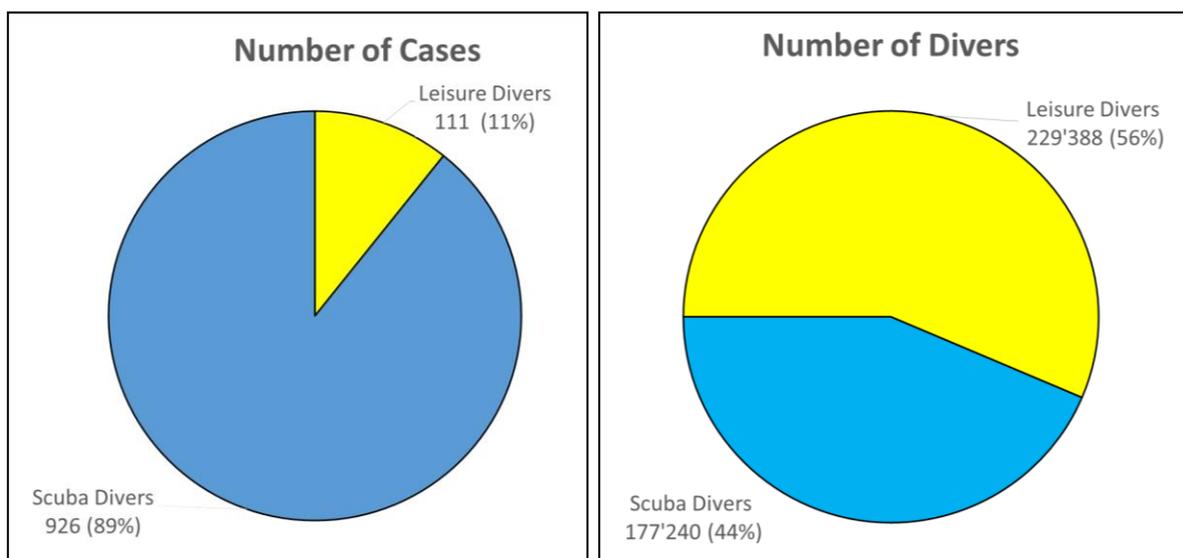
To the group of current “infrequent divers” also belong former “Scuba Divers” and former “Leisure Divers” who stopped active diving but maybe use diving offers on holiday and who possibly might be reactivated.

- When using the correction factors and the expected intermediate results of the number of initial trainings in 2012/13 as well as the comparison of the results structure with the detailed results of the survey in 2009 the following results for 2014 are:

Equipment yes / no	Number of Cases	Number of Divers	Quantity Factor
Leisure Divers	111	229'388	2'067
Scuba Divers	926	177'240	191
Total	1'037	406'628	

For comparison the figures of 2009:

Equipment yes / no	Number of Cases	Number of Divers	Quantity Factor
Leisure Divers	99	230'000	2'323
Scuba Divers	751	190'000	253
Total	850	420'000	



4. Result:

Total number of German divers in 2014:

Approx. 177'000 Scuba Divers with own equipment

Approx. 230'000 Leisure Divers without own equipment

Total: approx. 407'000 active divers'

For comparison, please see the results of 2009:

Approx. 190'000 Scuba Divers with own equipment

Approx. 230'00 Leisure Divers without own equipment

Total: approx. 420'000 active divers'

This represents a decrease of active divers at approx. 3.1 % during the last five years.

Notes:

- 20% more divers participated in the survey in 2014 than in 2009.
- The vast majority (up to 90%) of divers participating in the survey in 2014 (same as 2009) were “Scuba Divers”.
- Because of the low sample size for Leisure Divers only rough results could be derived from the survey.

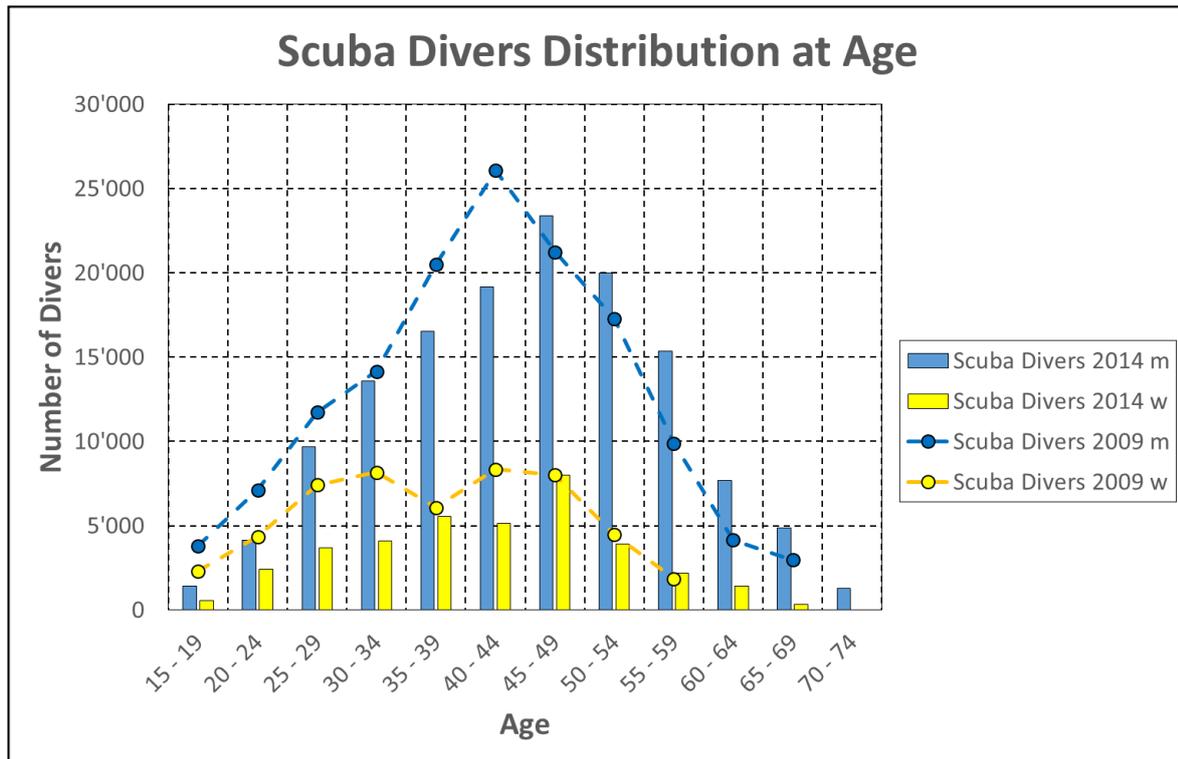
3 Distribution by age and sex

Extrapolation: Number of Divers

Age Group	Scuba Divers				
	Number of Cases		Numbers of Divers		Total Divers
	m	f	m	f	
10 - 14	1	1	1'278	1'496	2'774
15 - 19	6	2	1'438	561	1'999
20 - 24	20	10	4'155	2'431	6'586
25 - 29	55	18	9'668	3'703	13'371
30 - 34	85	22	13'583	4'114	17'697
35 - 39	94	27	16'523	5'554	22'077
40 - 44	109	25	19'160	5'143	24'303
45 - 49	133	39	23'379	8'022	31'401
50 - 54	119	20	19'967	3'927	23'894
55 - 59	74	9	15'373	2'188	17'561
60 - 64	32	5	7'670	1'403	9'073
65 - 69	17	1	4'890	337	5'226
70 - 74	2		1'278		1'278
Total	747	179	138'363	38'877	177'240

Age Group	Leisure Divers				
	Number of Cases		Number of Divers		Total Divers
	m	f	m	f	
10 - 14	1	1	11'656	13'640	25'296
15 - 19	8	2	17'484	5'115	22'599
20 - 24	4	5	7'576	11'083	18'659
25 - 29	10	4	16'027	7'502	23'529
30 - 34	7	1	10'199	1'705	11'904
35 - 39	8	2	12'822	3'751	16'573
40 - 44	15	6	24'041	11'253	35'294
45 - 49	5	7	8'014	13'129	21'142
50 - 54	10		15'299		15'299
55 - 59	6	1	11'365	2'217	13'581
60 - 64	4	2	8'742	5'115	13'857
70 - 74	2		11'656		11'656
Total	80	31	154'879	74'509	229'388

3.1 Scuba Divers



Distribution by gender of Scuba Divers (bar chart):

- Men (m): 78%
- Women (f): 22%

For comparison, the figures of 2009 (dashed line):

- Men (m): 73%
- Women (f): 27%

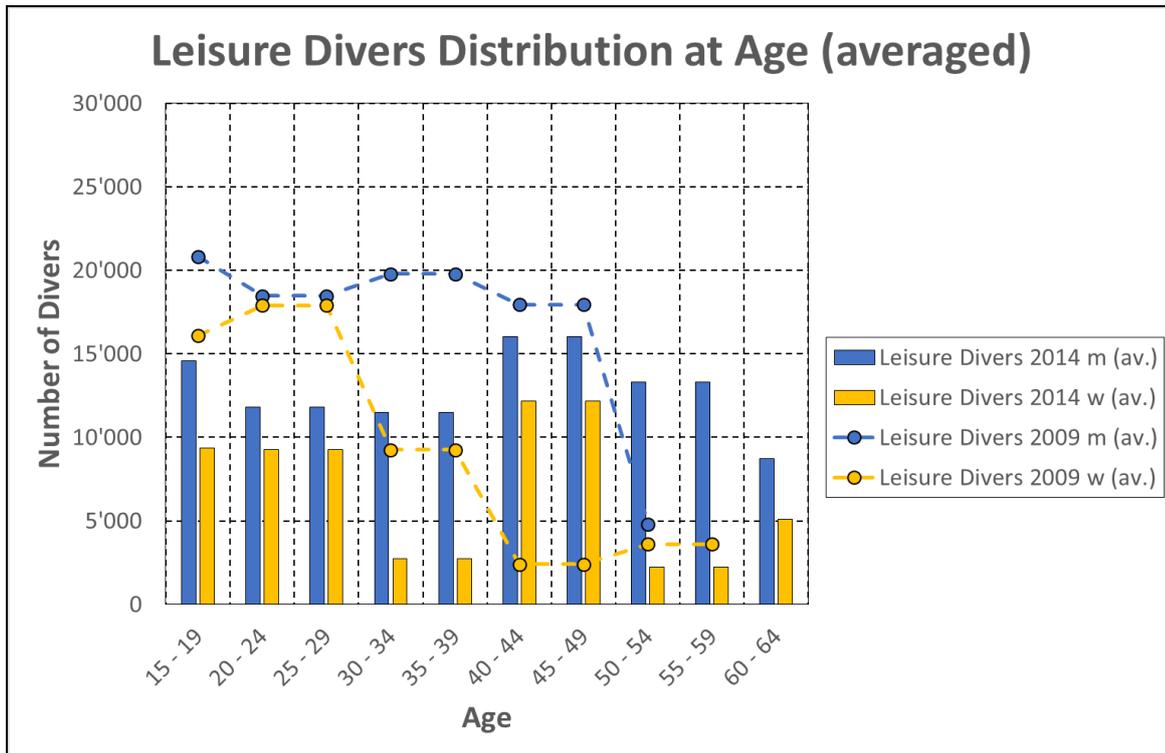
Significant changes during the last five years:

- The number of active Scuba Divers decreased from 190'000 (2009) to 177'000 (2014) by approx. 6.7%.
- This especially applies to female Scuba Divers: Decline from 51'000 (2009) to 39'000 (2014) by approx. 23%.
- The decline of male Scuba Divers from 138'930 (2009) to 138'363 (2014) is with approx. 0.4% only slightly.

The demographic change is clearly recognizable by a shift towards older divers:

- The older age groups aged over 45 years (especially at men) have a clearly higher presence than five years ago, the younger age groups are clearly weaker.

3.2 Leisure Divers



To take into account the low case numbers, the figures of two neighboring age groups of Leisure Divers each are summarized as average values.

Distribution by gender of Leisure Divers:

- Men (m): 68% (2014) 69% (2009)
- Women (f): 32% (2014) 31% (2009)

Significant changes during the last five years:

- The number of active Leisure Divers is nearly unchanged with approx. 230'000 (2009) and approx. 229'000 (2014)

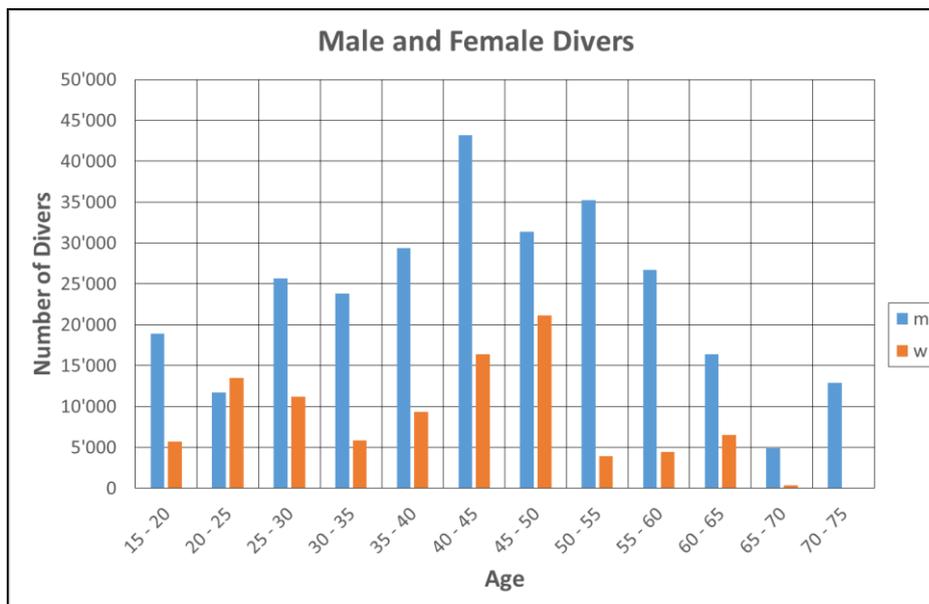
The demographic change is clearly recognizable by a shift towards older Leisure Divers:

- 2009 the age group from 30 to 50 was strongly affected
- 2014 the age group >40 men as well as women was particularly strong affected
- The figures for men show a remarkably high percentage of older divers > 50 years
- In 2014, the number of Leisure Divers aged under 40, with the men as well as the women, is significantly lower than in 2009.

3.3 Men and Women

For the age group 15 to75:

Age Group	Number of Divers 2014		
	m	f	m+f
15 - 20	18'922	5'676	24'598
20 - 25	11'731	13'514	25'245
25 - 30	25'695	11'205	36'900
30 - 35	23'782	5'819	29'601
35 - 40	29'345	9'305	38'650
40 - 45	43'201	16'396	59'596
45 - 50	31'392	21'151	52'543
50 - 55	35'266	3'927	39'193
55 - 60	26'737	4'404	31'142
60 - 65	16'412	6'518	22'930
65 - 70	4'890	337	5'226
70 - 75	12'934	0	12'934
Total	280'308	98'250	378'557



- At men, the 40 – 55 age group have a very strong presence.
- At women it is noticeable, a clear reduction of the 30 – 35 age groups and then later as of 50.

4 Percentage Divers of the Population

The chart shows

Per age group and

Separated by gender

The percentage

Male and female

Scuba divers or Leisure Divers

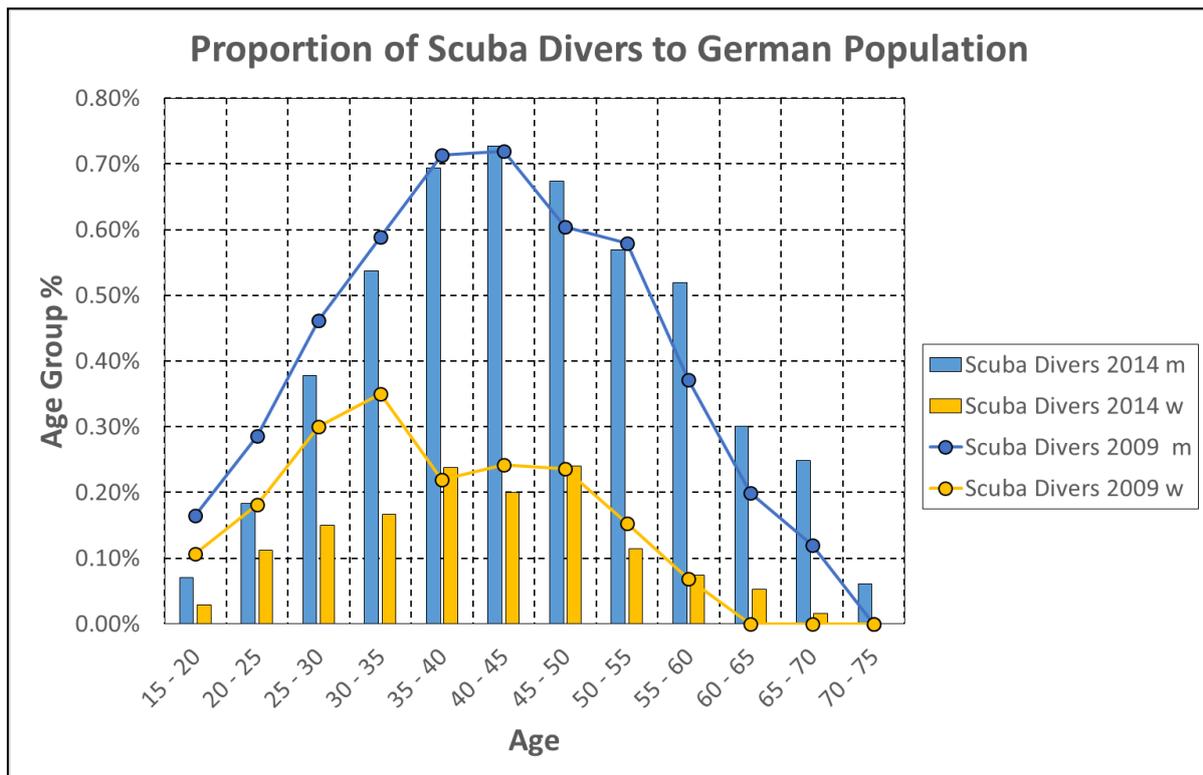
On the number of

Men and female of the German population

In this age group.

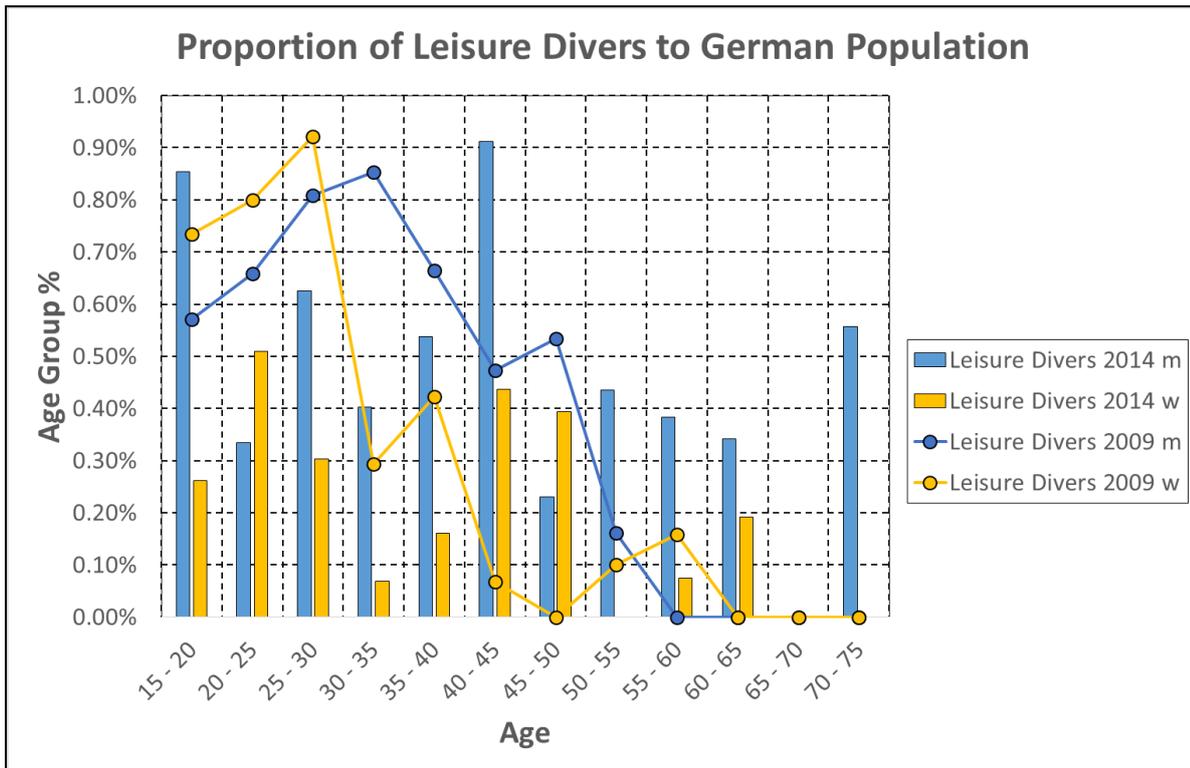
Age group	Percentage of the Population			
	Scuba Divers 2014		Leisure Divers 2014	
	m	f	m	f
15 - 20	0.07%	0.03%	0.85%	0.26%
20 - 25	0.18%	0.11%	0.33%	0.51%
25 - 30	0.38%	0.15%	0.63%	0.30%
30 - 35	0.54%	0.17%	0.40%	0.07%
35 - 40	0.69%	0.24%	0.54%	0.16%
40 - 45	0.73%	0.20%	0.91%	0.44%
45 - 50	0.67%	0.24%	0.23%	0.39%
50 - 55	0.57%	0.11%	0.44%	0.00%
55 - 60	0.52%	0.07%	0.38%	0.08%
60 - 65	0.30%	0.05%	0.34%	0.19%
65 - 70	0.25%	0.02%	0.00%	0.00%
70 - 75	0.06%	0.00%	0.56%	0.00%

4.1 Scuba Divers



- The data for Scuba Divers reflect the demographic change in Germany:
Among the men, scuba diving is still most popular at approx. 0.7% of the population in the age group 35 - 40. The percentage of older divers > 45 is 2014 higher than just five years ago, but the percentage of younger divers <35 is much lower.
- Among the female Scuba Divers a significant decrease is noticed at younger divers <35. This is obviously not only a demographic problem but it is structural in nature.

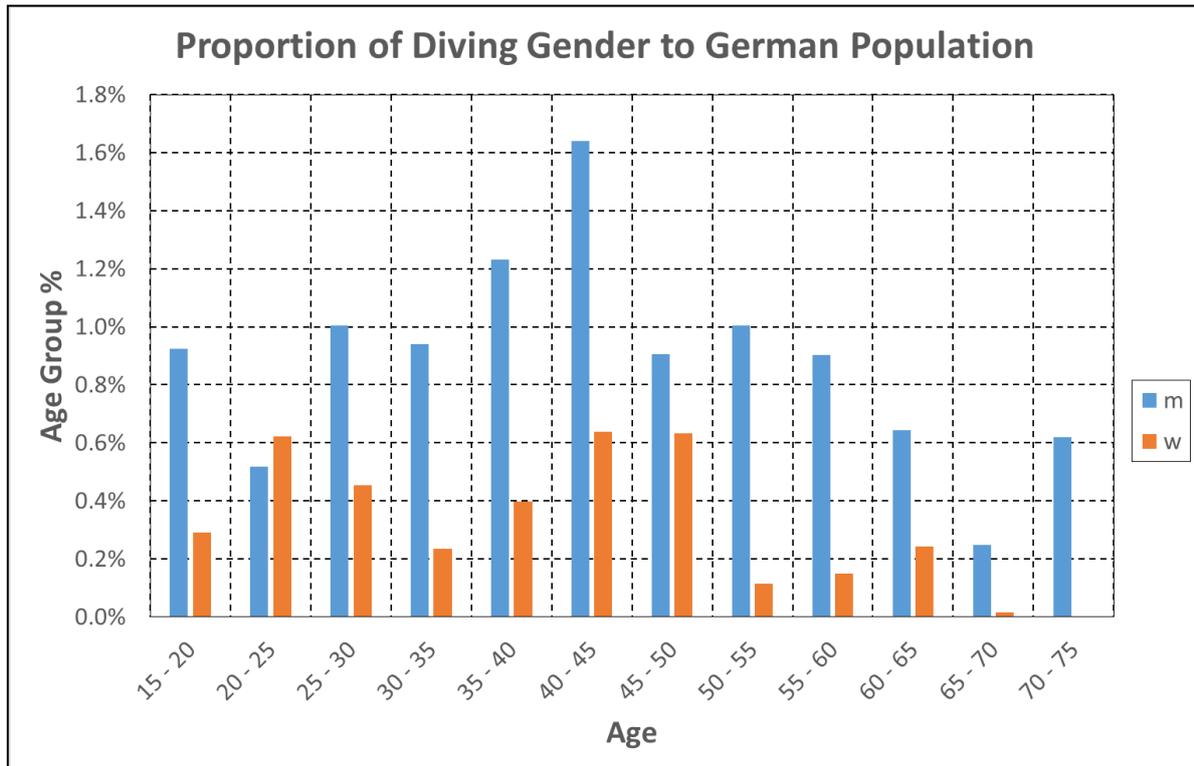
4.2 Leisure Divers



Considering the small number of cases there are differences of the figures in 2009 and 2014:

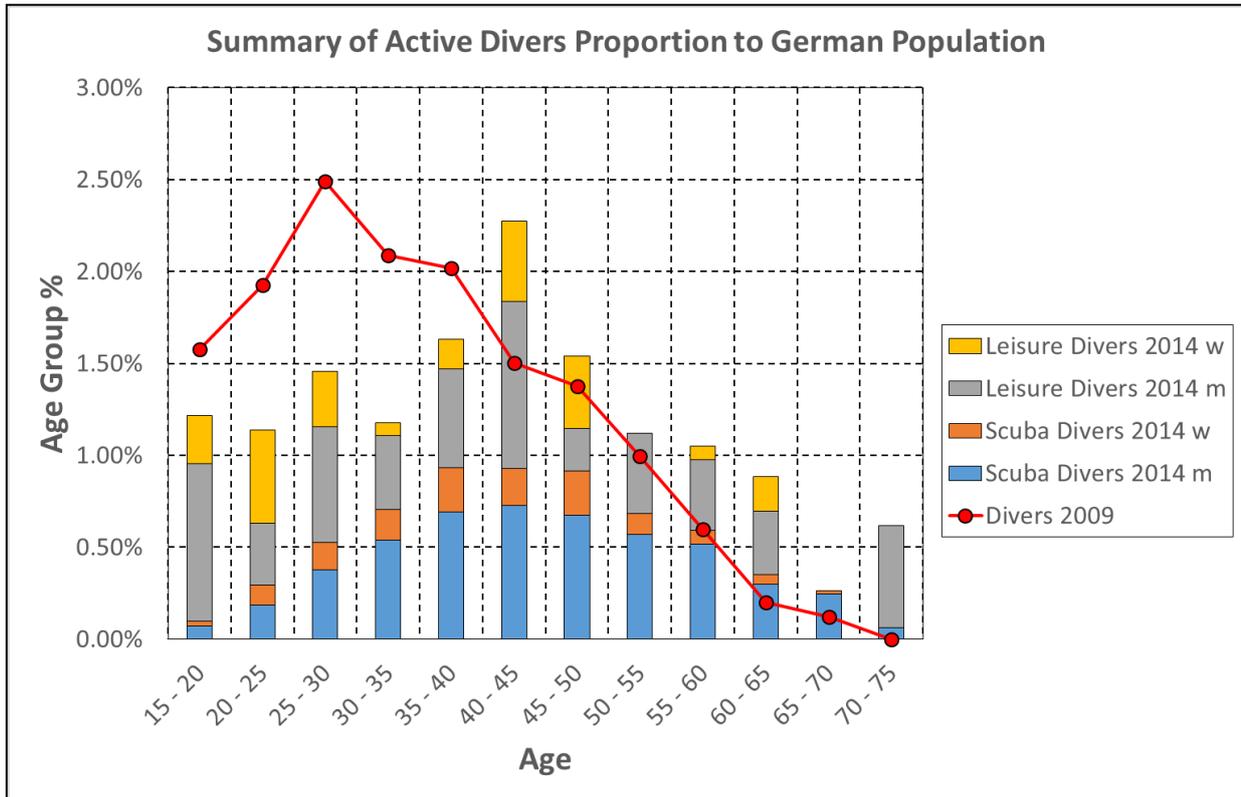
- Active Leisure Divers in the 20 to 40 age group on average are
 2009: 0.7% of male population
 0.6% of female population
 2014: 0.5% of male population
 0.3% of female population
- Predominantly younger divers at the 20 to 40 age group were active Leisure Divers in 2009. The base further broadened, 2014 even older divers at >40 were much more intensively than 5 years ago.
- Both men and women the percentage of younger divers <40 of the population was obviously lower in 2014 than in 2009, the proportion of women has halved.
- Taking into account the small number of cases the figures are able to indicate that possibly since 2009 older inactive Leisure Divers (“Rare Divers”) >50 could be activated.

4.3 Men and Women



- The percentages of male and female divers (Leisure Divers + Scuba Divers) at the age group of population show a typical, “healthy” structure:
- Among men could be observed (taking statistical imprecision into account) a stable share of divers of approx. 1% of the male population across all age groups until an age of late fifty. Afterwards the age-related withdrawal from active sports starts among men.
- As already indicated among women is after an entry of approx. 0.6% of the women aged 20 a clear drop is visible at the age of 30, probably for family reasons.
- In contrast to 2009 it is observed in 2014 that a higher proportion of women re-enter diving after a break of 5 to 10 years. A complete age-related withdrawal among women is then from the age of 50.

4.4 Summary



Summary:

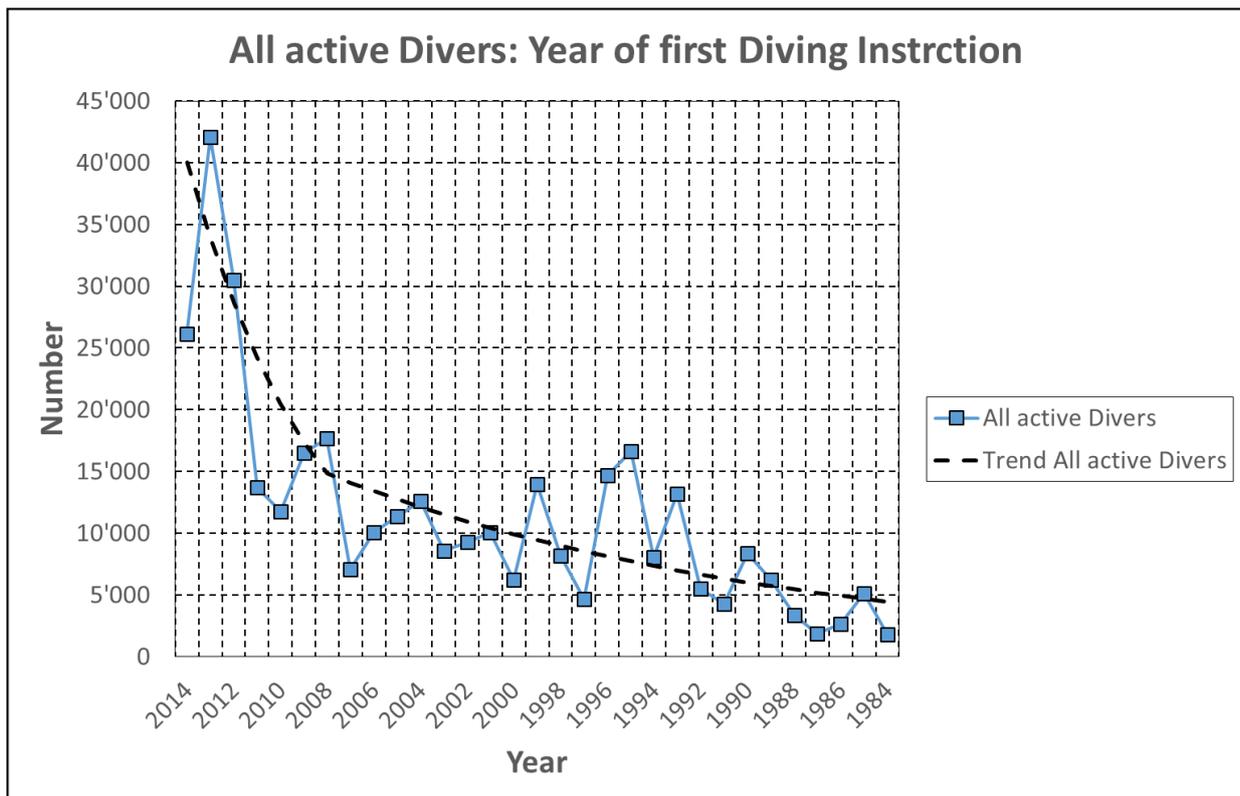
- The percentage of the population who are diving is with 2.3% most popular in the 40 to 45 age group in 2014. In this age group, the proportion of Leisure Divers considerably increase compared to the figures of 2009.
- Throughout is the proportion of active divers to the population in the younger age groups <40 significantly lower than in 2009.
- Instead, the proportion of active divers to the population among the age group >40 – especially the share of Leisure Divers – has increased partly very substantial.

5 Year of Initial Training

The following tables shows how many active German divers in which year completed their initial training in 2014.

Deviant of the way for calculating trends in the first study 2009 in the following are calculated separate trends for the short-term periods 2014 to 2010 and for the long-term period 2009 to 1984, in order to find out accurate dropout rates.

5.1 All active Divers



The trend line for the total number of active divers in 2014 above the year of their initial training allows the following conclusion:

- Per year, approx. 40'000 German divers completed their initial training.
- During the first five years after their initial training approx. 15% of divers give up active diving per year.
- Afterwards the rate of dropouts decreases significantly:
Approx. 5% of the active divers, whose initial training was 5 years previously, leave active diving annually.

Projection 1:

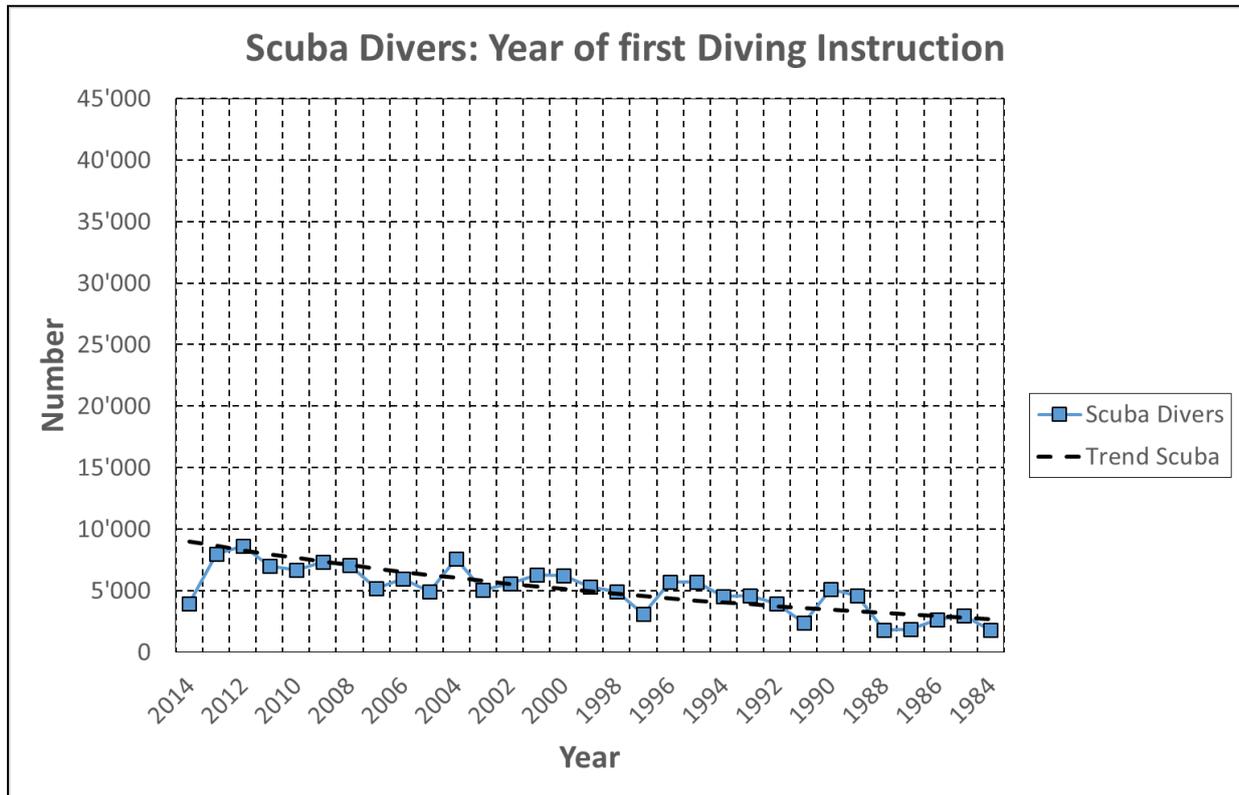
- With a continuous annual training rate of approx. 40'000 initial trainings one Mio. divers would have been trained during the last 25 years.

Projection 2:

The following results are based on detailed calculations for Scuba Divers and Leisure Divers (see the following chapters), state 2014:

- Per training year approx. 10'000 Scuba Divers and approx. 10'000 Leisure Divers stay active middle-termed. Altogether a yearly growth of 20.000 divers per year. The dropout rate of these groups is approx. 5% per year.
- These figures show statistically a stabile stock of approx. 400'000 active divers. This confirmed the projection of the stock figures in chapter 2.

5.2 Scuba Divers



The trend line for the total number of active Scuba Divers above the year of their initial training allows the following conclusions:

- Currently approx. 10'000 future divers get initial training per year.
- The annual share of dropouts is approx. 4%.
- Divers become Scuba Divers possibly after approx. 1 to 2 years after their initial training (by purchasing an own equipment).

For comparison the results of the survey in 2009:

- According to the demined trend in 2009, 16'000 future Scuba Divers got initial training five years ago.
- The share of dropouts was approx. 8.5% according to the trends in 2009

Conclusion:

- The number of persons who got further training after the initial training dropped significantly by approx. 37% during the previous five years.
- In parallel to this development, it is although worked out (by the new calculation method of the trend) a much lower long-term dropout rate of Scuba Divers. I.e.: According to the current trend, Scuba Divers remain passionate about their sport over a longer period than predicted in 2009.

5.3 Leisure Divers



Considering the small number of cases the trend line allows the following conclusion:

- Although nearly all divers purchase equipment to a greater or lesser extent shortly after their first diving instructions the rate of out-drops at Leisure Divers is very high during the first 5 years: annually approx. 22%. Approx. 50% of the future Leisure Divers give in active diving 3 years and approx. two-thirds five years after their first diving instruction.
- For the remaining third (approx. 10'000 divers) the rate of drop-outs decrease considerably:
 Approx. 5% of the active Leisure Divers, whose initial training took place more than 5 years ago, quit active diving currently per year.

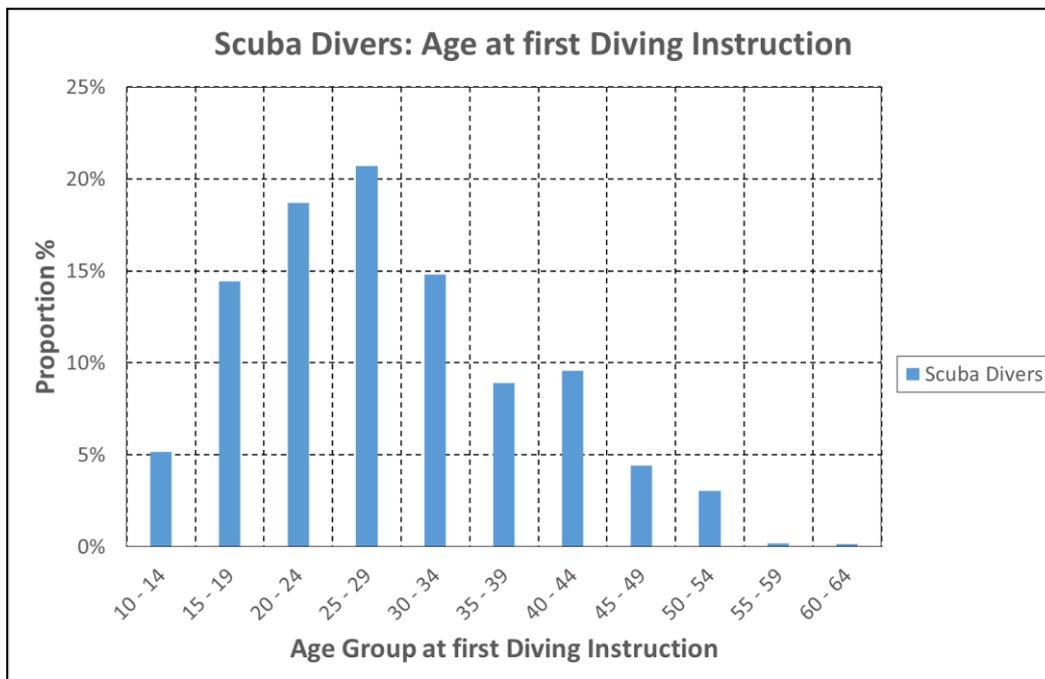
For comparison the results of the survey in 2009:

- The trend to withdrawal during the first years after the initial training did not change significantly.
- The share of dropouts commencing the five years after the initial training was approx. 10% according to the trend in 2009.

6 Age at Initial Diving Instruction

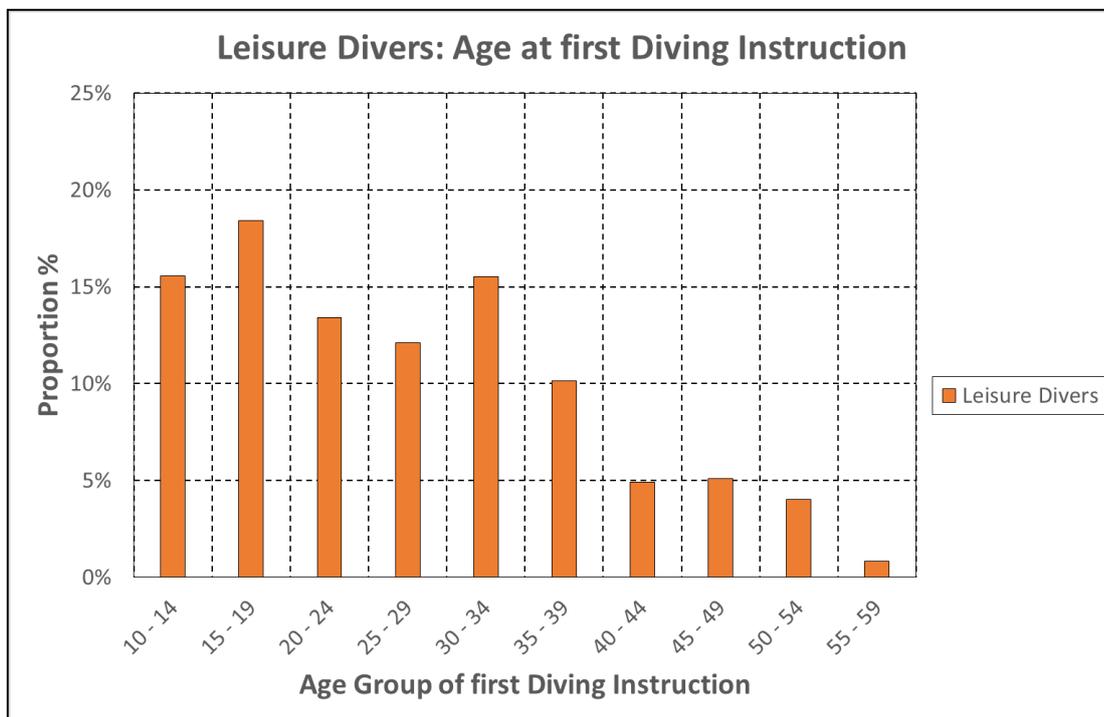
Age Group at Initial Training	Share %		
	Scuba Divers	Leisure Divers	All Active Divers
10 - 14	5.2%	15.6%	11.1%
15 - 19	14.4%	18.4%	16.7%
20 - 24	18.7%	13.4%	15.7%
25 - 29	20.7%	12.1%	15.8%
30 - 34	14.8%	15.5%	15.2%
35 - 39	8.9%	10.1%	9.6%
40 - 44	9.6%	4.9%	6.9%
45 - 49	4.4%	5.1%	4.8%
50 - 54	3.1%	4.0%	3.6%
55 - 59	0.2%	0.8%	0.6%
60 - 64	0.1%	0.0%	0.1%
Total	100.0%	100.0%	100.0%

6.1 Scuba Divers



- The same result as in the previous survey in 2009: Most of the Scuba Divers got their initial training at an age of 20 to 35. The percentage of initial trainings after the 60th birthday is very rare.

6.2 Leisure Divers



- Considering the small numbers of cases and the observation that Leisure Divers for these survey are only visible for some years:

The same result as in the survey 2009:

Nearly 90% of the initial diving instruction are before the 40th birthday, equally allocated to the age groups even to the juveniles.

7 Level of Diving Instruction

Of interest was the instruction level. The choice was between:

- Beginner (Scuba Diver, open water diver, 1* or alike),
- Intermediate (additional training, advanced or alike, special courses or more than 50 dives)
- Semi-professional/professional (Divemaster, Divecon, Instructor)

Projection Number of Divers

Number of Divers	Scuba Divers			Leisure Divers		
	m	f	Total	m	f	Total
Beginners	8'437	3'188	11'626	59'154	44'330	103'484
Advanced	56'633	19'523	76'156	54'055	23'188	77'243
Semi-pro	72'733	14'670	87'403	41'670	2'558	44'228
Total	137'804	37'381	175'185	154'879	70'076	224'955

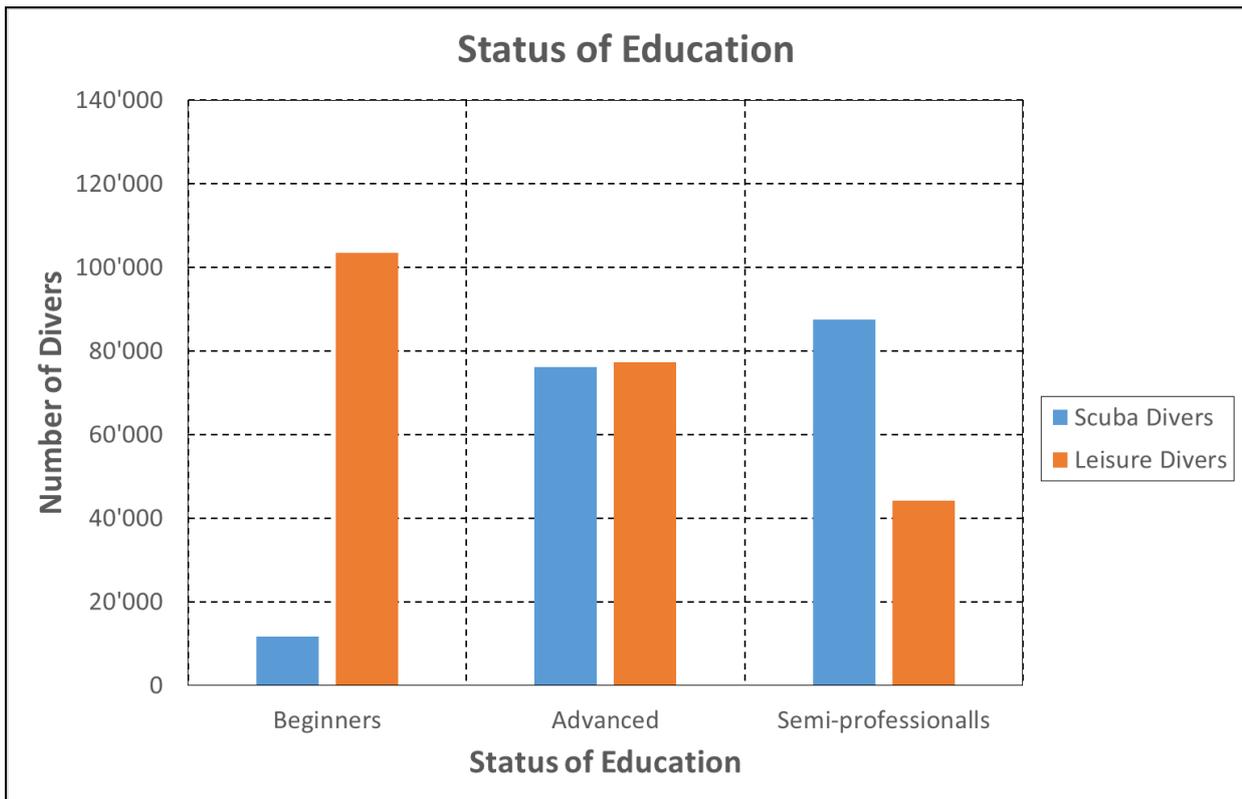
To evaluate the significance: number of cases

(Note: Projections for less than five cases are insecure)

Number of Cases	Scuba Divers			Leisure Divers		
	m	f	Total	m	f	Total
Beginners	42	15	57	28	16	44
Advanced	306	93	399	32	12	44
Semi-professionals	396	70	466	20	1	21
Total	744	178	922	80	29	109

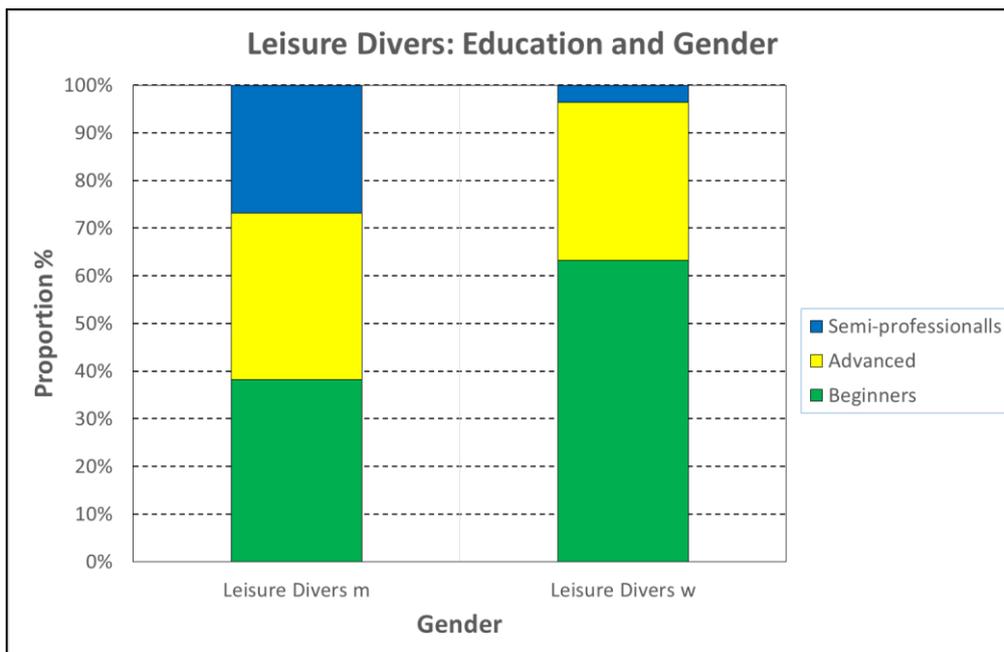
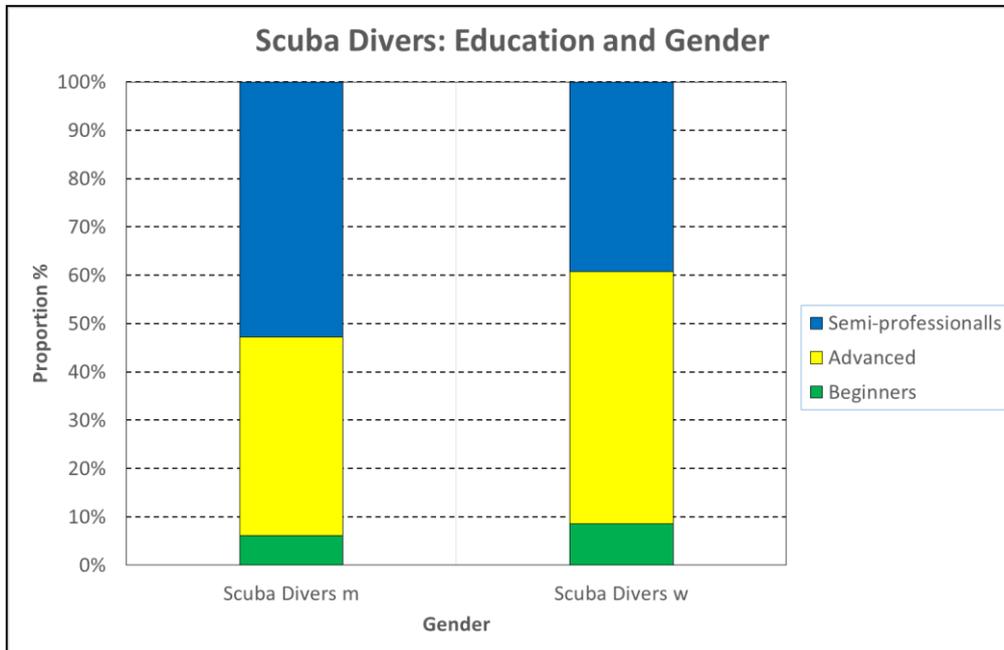
For comparison: Projection Number of Diver 2009

Number of Divers		
Level of Training	Scuba Diver	Leisure Diver
Beginners	15'788	135'834
Advanced	89'651	85'722
Semi-professionals	83'853	6'580
Total	189'292	228'136



- The vast majority of the Scuba Divers have an intermediate or semi-professional level of instruction in 2014 – same as already in 2009.
- Half of the Leisure Divers (in this survey) are beginners, but the percentage of advanced and semi-professionalls at Leisure Divers increased significantly.

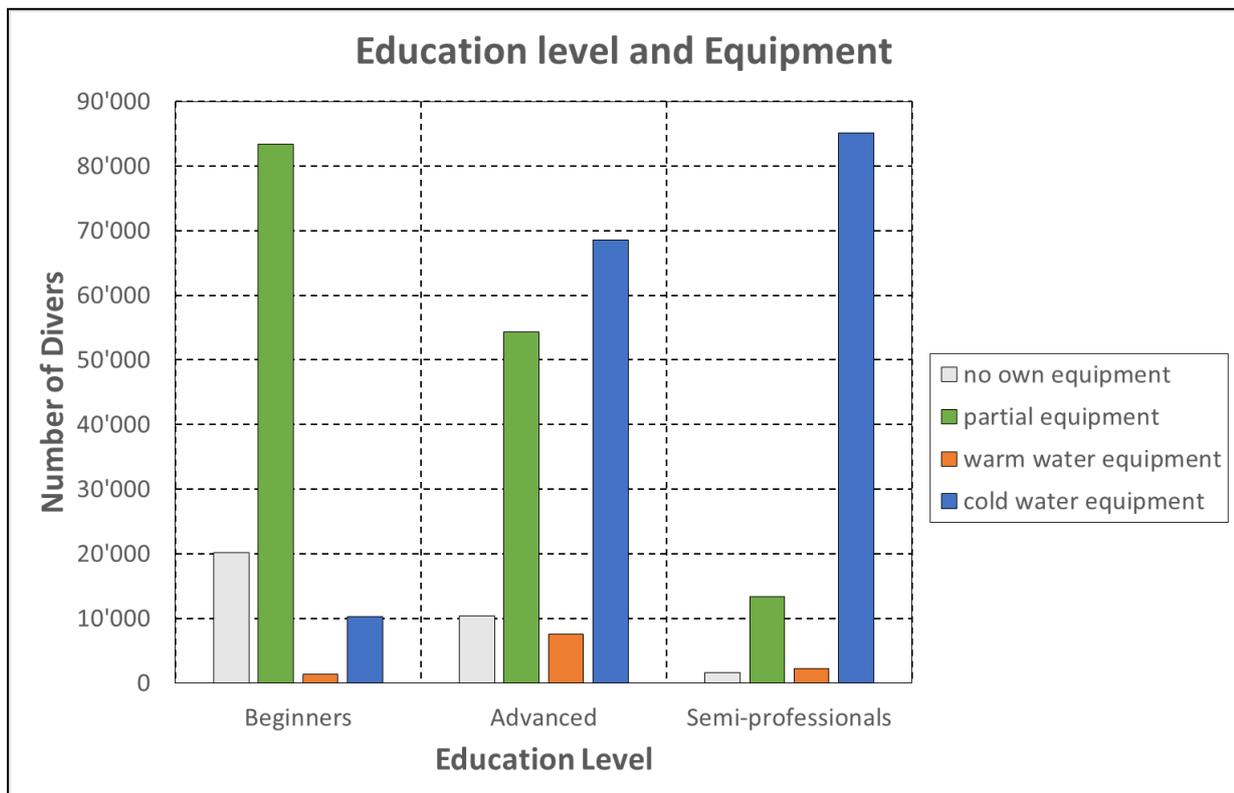
7.1 Training and Gender



- Among Scuba Divers have
 - * More than 90% of men and women an intermediate qualification
 - * More than 50% of men and 40% of women a semi-professional instruction.
- Among the Leisure Divers (in this survey)
 - * 40% of men and 60% of the women are beginners.

8 Equipment

Equipment	Level of Training		
	Beginners	Advanced	Semiprofessionals
No	20'142	10'453	1'603
Partial equipment	83'342	54'297	13'332
Warm water	1'405	7'596	2'218
Cold water	10'220	68'560	85'185
Total	115'110	140'906	102'337



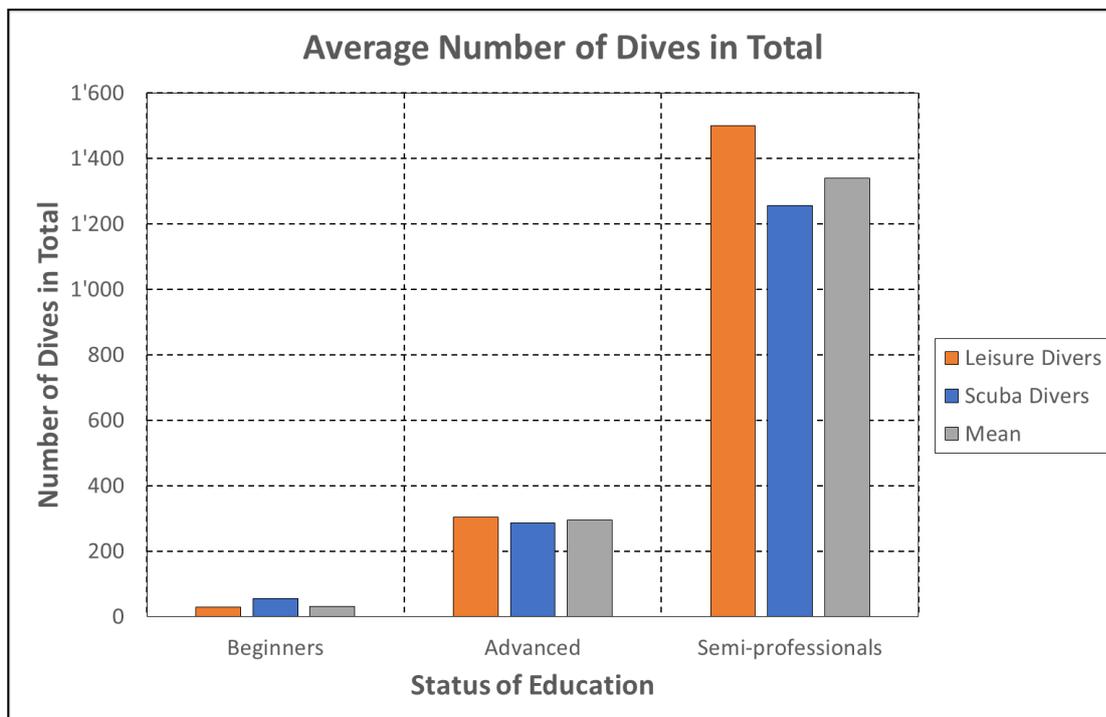
- Most of the beginners purchase at least a partial equipment along with the initial training. This shows an fundamental interest to continue the sport.
- With increasing experience own complete equipment would be purchased, primarily cold-water suitable.
- Anyway, approx. 45% of advanced and 15% of semi-professionals own no or only a partial equipment.

9 Dives

9.1 Dives in Total

For the following tables, the mean number of dives per cell is determined by, for each cell, taking the sum of dives, extrapolated with the quantity factor, and dividing it by the number of divers, again extrapolated with the quantity factor

Mean Number of Dives in Total			
Training	Scuba Divers	Leisure Divers	Mean Number
Beginners	54	28	31
Advanced	287	305	296
Semi-professionals	1'256	1'501	1'339



- Scuba Divers reported definitely more dives than Leisure Divers in the survey of 2009.
- The current survey shows an overall equal number of reported dives per training level at Scuba Divers as well as Leisure Divers.
- A matter is of course, that by an increasing level of training the number of dives increases too:
Beginners approx. 30, advanced approx. 300, semi-professionals approx. 1'300 dives.

9.2 Dives 2013 and 2014

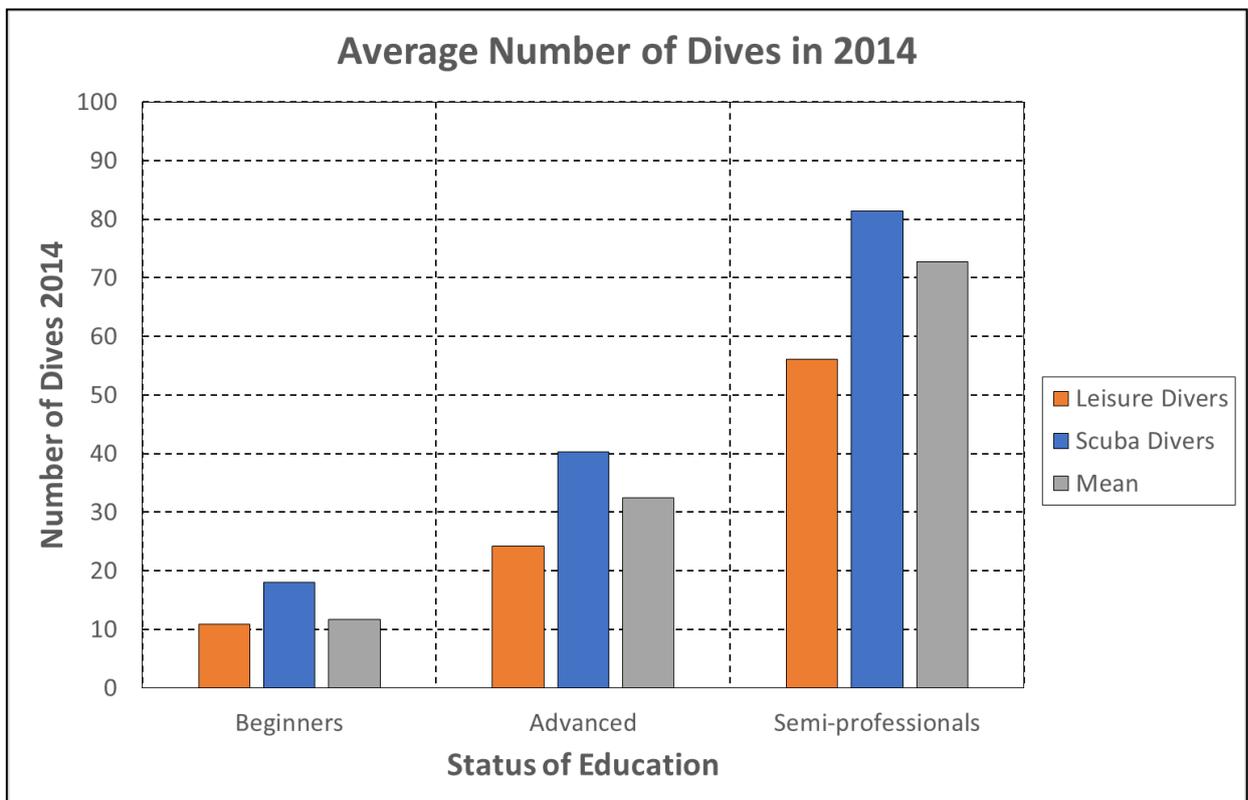
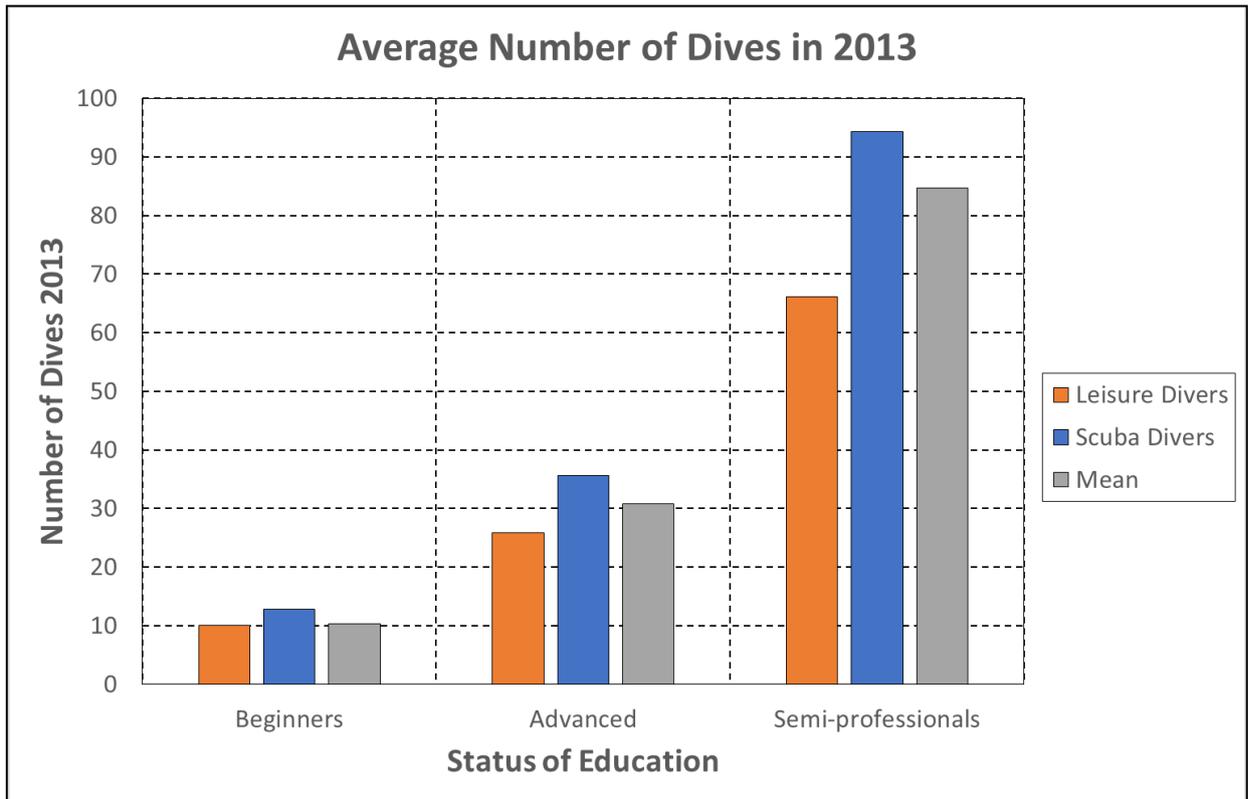
Mean Number of Dives 2013			
Training	Scuba Divers	Leisure Divers	Mean Number
Beginners	13	10	10
Advanced	36	26	31
Semi-professionals	94	66	85

Mean Number (planned) Divers 2014			
Level of Training	Scuba Divers	Leisure Divers	Mean Number
Beginners	18	11	12
Advanced	40	24	32
Semi-professionals	81	56	73

For comparison the figures of 2009

Mean Number of Dives per Year 2008 - 2009		
	Scuba Divers	Leisure Divers
Beginners	12	9
Advanced	25	17
Semi-professionals	60	20

- In 2013/14 diving was significantly more popular than 2008/09.
- It is assumed that the (planned) intensity of dives in 2014 was lower than 2013: Beginners approx. 12, advanced approx. 32, semi-professionals approx. 73 dives per year
- Scuba Divers were significantly more often in the water than Leisure Divers.



10 Other Hobbies

The survey asked for other hobbies with the question “Which other hobbies do you have?”

The internet questionnaire had an arbitrary number of multiple answers possible (free text).

In the 1'037 questionnaires analyzed are listed

- in 836 cases with at least one hobby
- in 256 cases with three or more hobbies

The listed hobbies are summarized according to 41 hobby groups

	Hobby-Group
1	Fishing
2	Car racing, motorcycling
3	Mountaineering
4	Computer
5	Parachuting, aviation
6	Family
7	Photography, Video
8	Geocaching
9	Golf
10	House, Garden
11	Pets
12	Hunting
13	Reading
14	Model making
15	Music
16	Traveling
17	Horse riding
18	Rescue services
19	Others (hobbies)
20	Dancing
21	Sport shooting
22	Hiking, walking, jogging
23	Sport (general)
24	Ball sports (without soccer)
25	Cycling (bike, mountain bike etc.)
26	Sport fitness
27	Sport soccer
28	Martial arts
29	Weight training

30	Running
31	Sport general
32	Sport tennis
33	Sport triathlon
34	Water sports apnea diving
35	Water sports boat
36	Water sports boat sailing
37	Water sports swimming
38	Water sports other
39	Water sports under water rugby
40	Winter sport ski, snowboard
41	Winter sport other

The different (physically active) sports are roughly categorized into “water sports” and other “sports”.

The counting per hobby group shows (projected by the quantity factor) how many divers, possibly divided by gender and age group, named these hobby groups.

The percentage figures expressed in the following tables should help to evaluate the frequency of mention within a column; therefore, they always relate to the relevant column totals.

10.1 Hobbies by frequency of mention

Ranking	Hobby Group	Gender		Total
		m	f	
1	Cycling	11.5%	8.8%	10.7%
2	Water sport swimming	7.8%	11.9%	9.0%
3	Hiking, walking, jogging	6.5%	6.6%	6.5%
4	Sport running	5.9%	4.7%	5.5%
5	Sport fitness	5.2%	5.5%	5.3%
6	Rescue services	7.1%	0.5%	5.1%
7	All sports	2.5%	9.7%	4.6%
8	Reading	3.6%	6.1%	4.3%
9	Car racing, motorcycling	5.5%	1.4%	4.3%
10	Winter sport ski, snowboard	4.1%	4.0%	4.0%
11	Photo, video	3.8%	3.3%	3.6%
12	House, gardening	2.3%	6.0%	3.4%
13	Music	2.5%	4.9%	3.2%
14	Water sport boar sailing	3.7%	1.3%	3.0%
15	Dancing	1.1%	3.4%	1.8%
16	Mountaineering	2.4%	0.3%	1.7%
17	Soccer	2.4%	0.0%	1.7%

18	Water sports others	1.7%	1.4%	1.6%
19	Sport other	1.4%	1.8%	1.5%
20	Sport martial arts	1.5%	1.3%	1.5%
21	Computer	2.1%	0.0%	1.5%
22	Traveling	1.0%	2.0%	1.3%
23	Water sports boat	1.0%	1.7%	1.2%
24	Family	1.3%	0.9%	1.2%
25	Sport	0.7%	1.5%	1.0%
26	Sport weight training	0.5%	1.3%	0.8%
27	Fishing	1.0%	0.2%	0.7%
28	Sport tennis	0.5%	1.2%	0.7%
29	Geocaching	0.8%	0.3%	0.6%
30	Water sports apnea diving	0.4%	1.1%	0.6%
31	Model making	0.7%	0.0%	0.5%
32	Water sports underwater rugby	0.6%	0.2%	0.5%
33	Parachuting aviation	0.7%	0.0%	0.5%
34	Sport shooting	0.3%	0.0%	0.2%
35	Riding	0.1%	0.5%	0.2%
36	Golf	0.2%	0.2%	0.2%
37	Sport Triathlon	0.2%	0.1%	0.2%
38	Pets	0.1%	0.2%	0.1%
39	Hunting	0.2%	0.0%	0.1%
40	Winter sports others	0.1%	0.1%	0.1%
41	Others	5.3%	5.6%	5.4%
	Column in total	100.0%	100.0%	100.0%

The 10 most frequent hobbies:

Ranking	Hobby Group	Gender		Total
		m	f	
1	Cycling	11.5%	8.8%	10.7%
2	Water sports swimming	7.8%	11.9%	9.0%
3	Hiking, walking, jogging	6.5%	6.6%	6.5%
4	Sport running	5.9%	4.7%	5.5%
5	Sport fitness	5.2%	5.5%	5.3%
6	Rescue services	7.1%	0.5%	5.1%
7	Ball sports (without soccer)	2.5%	9.7%	4.6%
8	Reading	3.6%	6.1%	4.3%
9	Car racing, motorcycling	5.5%	1.4%	4.3%
10	Winter sports ski, snowboard	4.1%	4.0%	4.0%

- By the ten most frequently named hobbies sports make up one-half.

- Most frequently mentioned of about 10% of the divers in total are
 Biking (Bicycle, mountain bike, etc.) and
 Swimming
- Around 7% of men are active in rescue services (DLRG, fire brigade, etc.)
- At women dominates
 Swimming
 Ball sports (without soccer)
 Cycling

10.2 Hobbies by Gender and Age Groups

According to the current age, four age groups were formed of two decades each.

10.2.1 Men: the 20 most frequent hobbies

Ranking	Hobby Group	m Age Group				m Total
		10 - 20	20 - 40	40 - 60	60 - 80	
1	Cycling	1.0%	12.3%	11.3%	15.7%	11.5%
2	Water sport swimming	15.6%	7.0%	10.5%	1.1%	7.8%
3	Rescue services	30.8%	5.8%	4.3%	0.8%	7.1%
4	Hiking, walking, jogging	0.5%	6.5%	6.8%	9.6%	6.5%
5	Sport running	0.0%	6.1%	5.2%	10.1%	5.9%
6	Car racing, motorcycling	0.0%	4.0%	6.9%	12.6%	5.5%
7	Others	4.7%	6.7%	5.1%	0.4%	5.3%
8	Sport fitness	2.7%	5.3%	2.1%	11.9%	5.2%
9	Winter sport ski, snowboard	2.7%	5.2%	3.6%	1.5%	4.1%
10	Photo, video	0.0%	3.1%	4.4%	7.9%	3.8%
11	Water sport boat sailing	4.7%	2.3%	3.0%	9.6%	3.7%
12	Reading	4.7%	3.1%	3.9%	4.3%	3.6%
13	Music	7.4%	2.9%	0.6%	0.7%	2.5%
14	Sport ball	9.9%	1.8%	1.7%	1.3%	2.5%
15	Sport soccer	0.0%	2.9%	3.8%	0.0%	2.4%
16	Mountaineering	0.0%	4.0%	0.6%	0.4%	2.4%
17	House, gardening	0.0%	2.2%	3.3%	2.1%	2.3%
18	Computer	4.7%	2.5%	0.6%	0.8%	2.1%
19	Water sport others	0.0%	1.6%	3.3%	0.4%	1.7%
20	Sport martial arts	4.7%	1.8%	0.3%	0.4%	1.5%

It should be noted that in the various age groups:

- Men under 20
 - are very much engaged in rescue services
 - like swimming,
 - like ball sports (without soccer),
 - like to make music.
- Men aged 20 to 40 like
 - cycling and swimming,
 - hiking, walking, running,
 - and are engaged in rescue services.
- Men in the age group 40 to 60 like
 - cycling and swimming,
 - driving and/or motorcycling
 - hiking, walking, running.

- Men aged over 60
like cycling and running/especially jogging,
like to drive cars or motorcycling,
like to exercise fitness sport,
like sailing,
and to take photos and to film.

10.2.2 Women: the 20 most frequent hobbies

Ranking	Hobby Group	Age Group				f Total
		10 - 20	20 - 40	40 - 60	60 - 80	
1	Water sport swimming	22.5%	11.3%	5.1%	5.9%	11.9%
2	Sport ball	67.7%	2.5%	0.0%	0.0%	9.7%
3	Cycling	0.0%	8.9%	9.1%	30.1%	8.8%
4	Hiking, walking, jogging	0.0%	6.8%	16.0%	6.5%	6.6%
5	Reading	0.0%	5.9%	24.1%	0.0%	6.1%
6	House, gardening	0.0%	7.2%	6.2%	0.0%	6.0%
7	Others	0.0%	7.0%	1.5%	3.0%	5.6%
8	Sport fitness	0.0%	6.3%	7.6%	3.0%	5.5%
9	Music	0.0%	6.2%	1.5%	0.0%	4.9%
10	Running	0.0%	5.6%	4.7%	0.0%	4.7%
11	Winter sport ski, snowboard	1.2%	4.6%	4.4%	0.0%	4.0%
12	Dancing	6.3%	3.2%	1.5%	3.0%	3.4%
13	Photo, video	0.0%	3.5%	3.3%	9.5%	3.3%
14	Traveling	0.0%	1.9%	2.9%	5.9%	2.0%
15	Sport others	0.0%	2.2%	1.5%	0.0%	1.8%
16	Water sport boat	0.0%	0.6%	0.0%	27.1%	1.7%
17	Sport	0.0%	1.8%	1.8%	0.0%	1.5%
18	Driving, motorcycling	1.2%	1.7%	0.0%	0.0%	1.4%
19	Water sport Others	0.0%	1.6%	2.9%	0.0%	1.4%
20	Martial arts	1.2%	1.4%	1.5%	0.0%	1.3%

It should be noted that in the various age groups:

- Women aged under 20 exercise especially ball sports and swimming, and they like to dance.
- Women aged 20 to 40 like swimming and cycling, they are engaged in their house and gardening, hiking, walking, jogging and exercise fitness sports, to play music.

- Women aged 40 to 60 like especially reading, hiking, walking, jogging, cycling, and exercise Fitness-Sport, are engaged in their house or gardening.
- Women aged over 60 like especially cycling, are keen yachtswomen, like to take photos and to film, like hiking and swimming, and traveling.

11 Intensity of certain leisure activities

In addition to the query concerning hobbies the intensity with which the selected activity are exercised.

The question was, "How intensive do you practice your leisure activities?"

- Diving
- Boating
- Cycling / biking
- Running / jogging
- Swimming
- Winter sports
- Fitness training
- Camping / caravanning

The intensity per activity should be marked with a cross at a scale from 1 to 5.

never	(rarely)	occasionally	(often)	intensive
1	2	3	4	5

The following reporting specifies per leisure activity the intensity distribution per age group and gender.

Additionally charged were as per leisure activity the mean value of intensity per age group and gender.

A mean value <3.0 means:

More than half of the case group practice this activity occasionally to rarely.

A mean value >3.5 means:

More than half of the case group practice this activity often to intensive.

A mean value >4.0 means:

More than 66% of the case group practice this activity often to intensive.

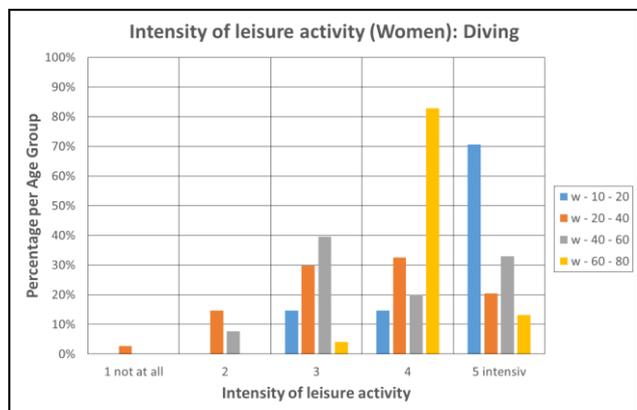
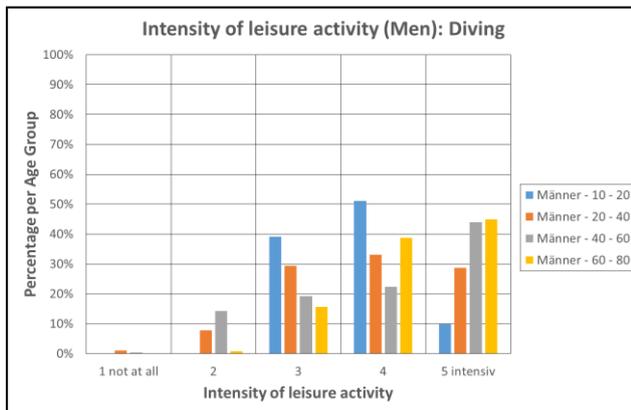
Notice regarding number of cases per case group:

Number of cases per case group			
Age Group	Gender		Total
	m	f	
10 - 20	14	5	19
20 - 40	532	165	697
40 - 60	206	29	235
60 - 80	53	7	60
Total	805	206	1011

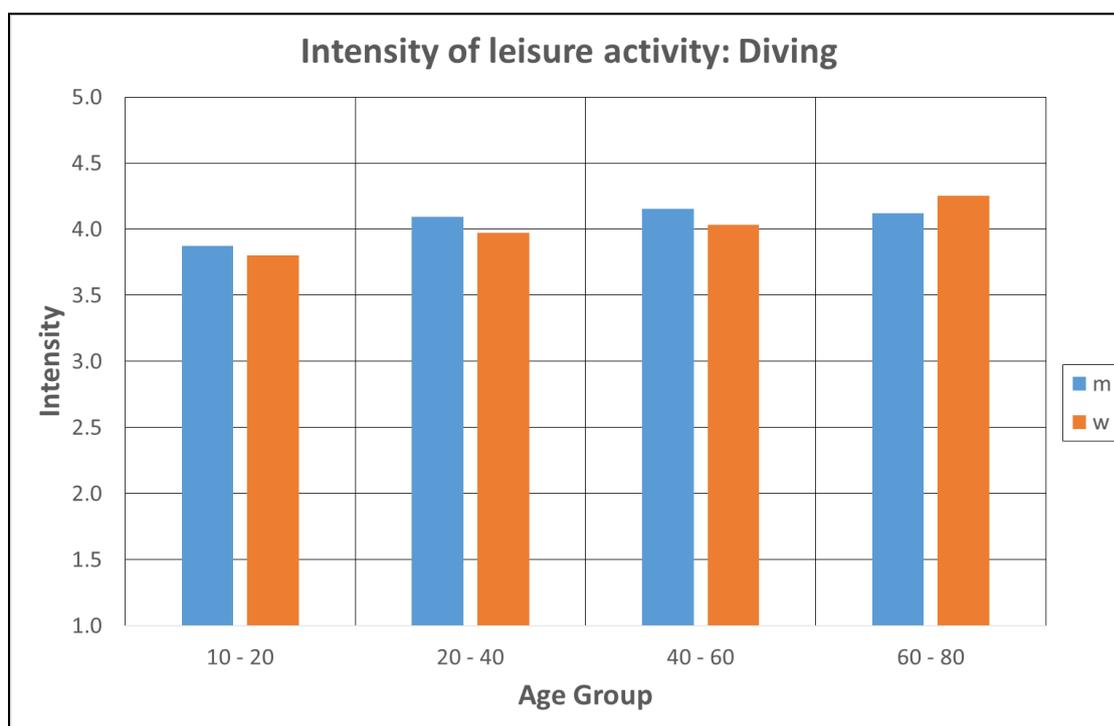
- The number of cases at men is sufficient for a mean value formation at all age groups.
- The results for women's age groups 10 to 20 and 60 to 80 should be interpreted with care due to the small numbers of cases.

11.1 Leisure Activity: Diving

Leisure Activity: Diving					
Percentage assessment per gender and age group					
	Men				
	10 - 20	20 - 40	40 - 60	60 - 80	Mean value
1 never	0%	1%	0%	0%	1%
2	0%	8%	14%	1%	7%
3	39%	29%	19%	16%	27%
4	51%	33%	22%	39%	33%
5 intensive	10%	29%	44%	45%	32%
Total	100%	100%	100%	100%	100%
	Women				
	10 - 20	20 - 40	40 - 60	60 - 80	Mean value
1 never	0%	3%	0%	0%	2%
2	0%	15%	8%	0%	11%
3	15%	30%	40%	4%	26%
4	15%	32%	20%	83%	32%
5 intensive	71%	20%	33%	13%	30%
Total	100%	100%	100%	100%	100%



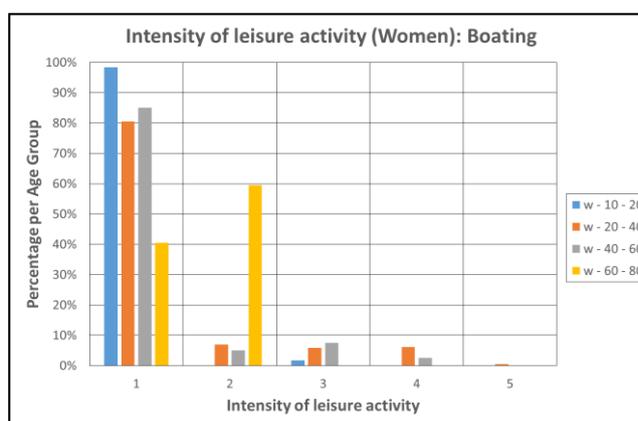
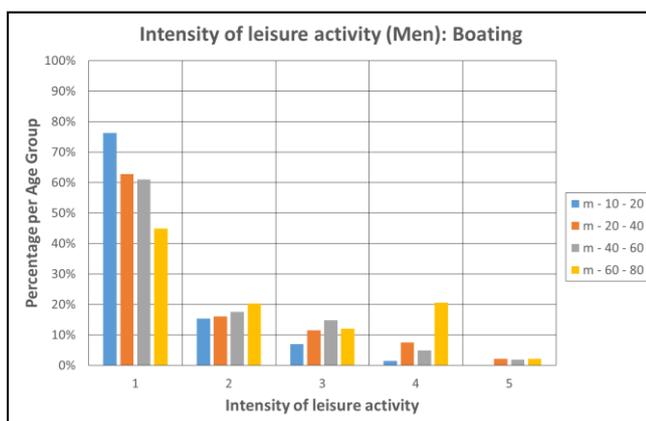
Leisure Activity: Diving			
Average of assessment per gender and age group			
Age Group	m	f	Mean value
10 - 20	3.9	3.8	3.9
20 - 40	4.1	4.0	4.1
40 - 60	4.2	4.0	4.1
60 - 80	4.1	4.3	4.1
Average	4.1	4.0	4.1



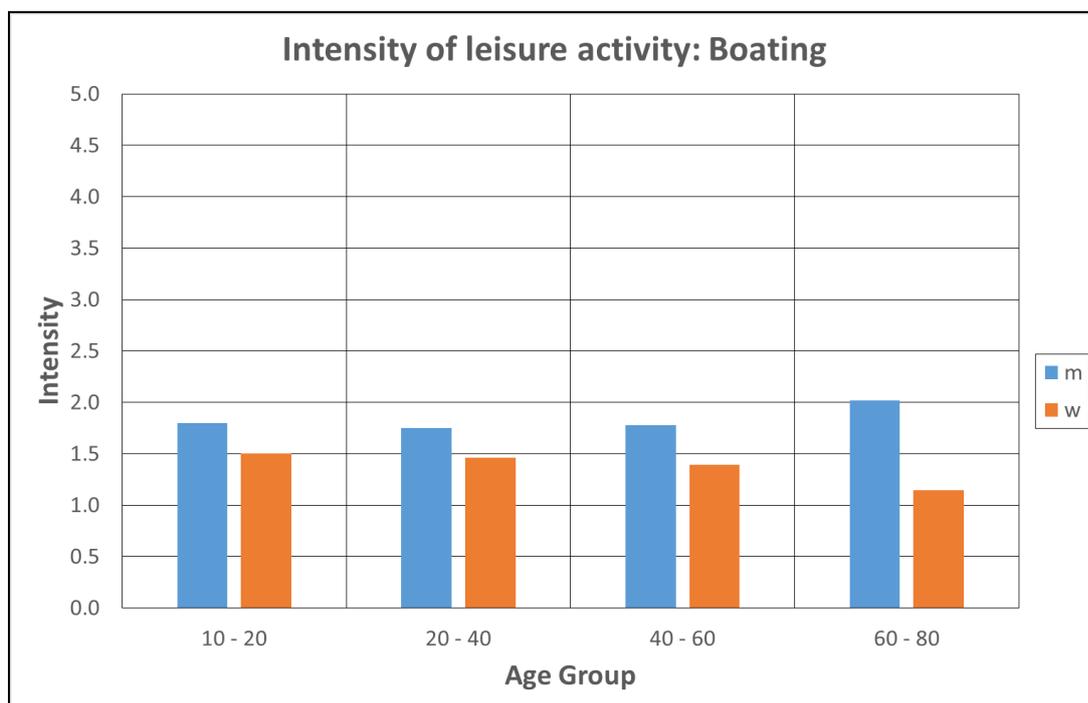
- Diving is the dominating leisure activity for a medium-active diver. Intensity: 4.1 (“often” to “intensive”).
- 65% of men and 62% of women practice diving “often” to “intensive”.

11.2 Leisure Activity: Boating

Leisure Activity: Boating					
Share of Assessment per Gender and Age Group					
	Men				
Assessment	10 - 20	20 - 40	40 - 60	60 - 80	Mean value
1	76%	63%	61%	45%	62%
2	15%	16%	18%	20%	17%
3	7%	12%	15%	12%	12%
4	2%	8%	5%	21%	8%
5	0%	2%	2%	2%	2%
Total	100%	100%	100%	100%	100%
	Women				
	10 - 20	20 - 40	40 - 60	60 - 80	Mean value
1	98%	80%	85%	40%	82%
2	0%	7%	5%	60%	8%
3	2%	6%	7%	0%	5%
4	0%	6%	2%	0%	5%
5	0%	1%	0%	0%	0%
Total	100%	100%	100%	100%	100%



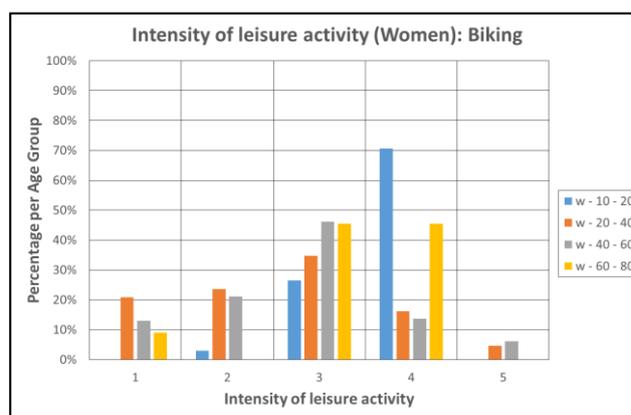
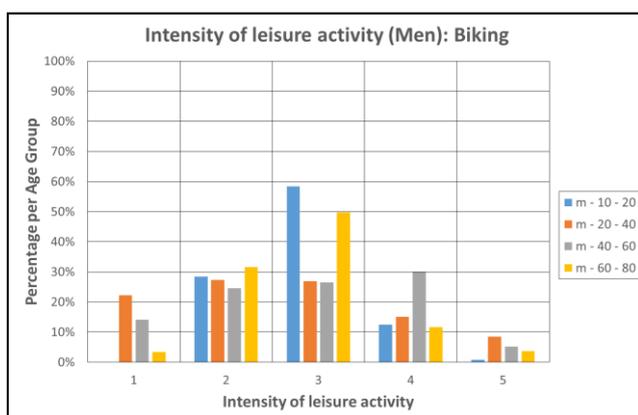
Leisure Activity: Boating			
Mean value of assessment per gender and age group			
Age Group	m	f	Mean value
10 - 20	1.8	1.5	1.7
20 - 40	1.7	1.5	1.7
40 - 60	1.8	1.4	1.7
60 - 80	2.0	1.1	1.9
Mean value	1.8	1.4	1.7



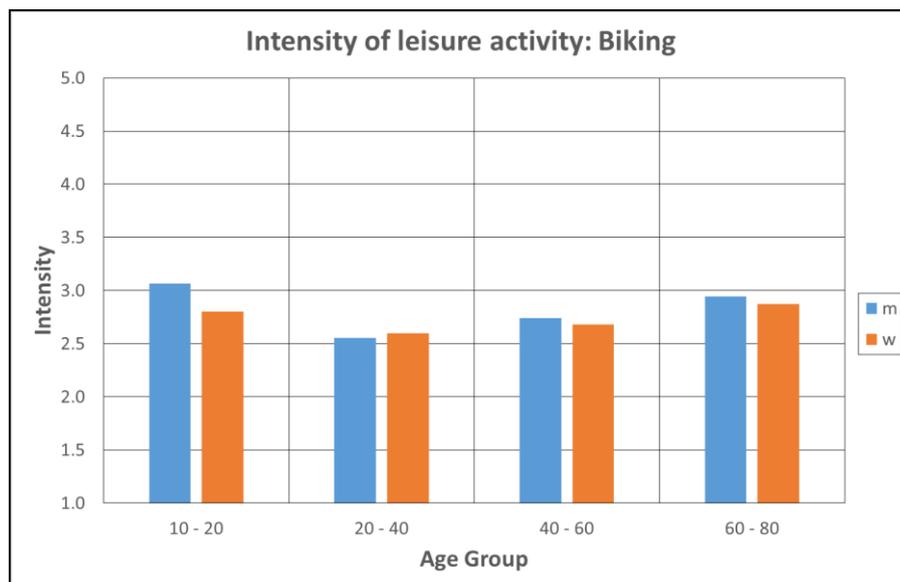
- For most of the divers boating is not an important leisure activity (rarely or never): Men: 79%, women: 90%). Intensity on average: Men 1.8 (rarely), women 1.4 (never)
- Exception: For on average 10% of men (23% of men >60) this is an “often” to “intensive” practiced leisure activity.

11.3 Leisure Activity: Cycling/ Biking

Leisure activity: Cycling / biking					
Share of assessment per gender and age group					
	Men				
Assessment	10 - 20	20 - 40	40 - 60	60 - 80	Mean value
1	0%	22%	14%	3%	16%
2	28%	27%	24%	32%	27%
3	58%	27%	26%	50%	33%
4	12%	15%	30%	12%	18%
5	1%	9%	5%	4%	6%
Total	100%	100%	100%	100%	100%
	Women				
	10 - 20	20 - 40	40 - 60	60 - 80	Mean value
1	0%	21%	13%	9%	16%
2	3%	24%	21%	0%	18%
3	26%	35%	46%	45%	35%
4	71%	16%	14%	45%	27%
5	0%	5%	6%	0%	4%
Total	100%	100%	100%	100%	100%



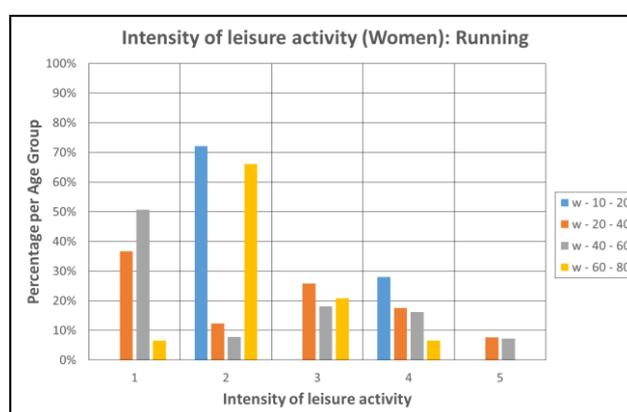
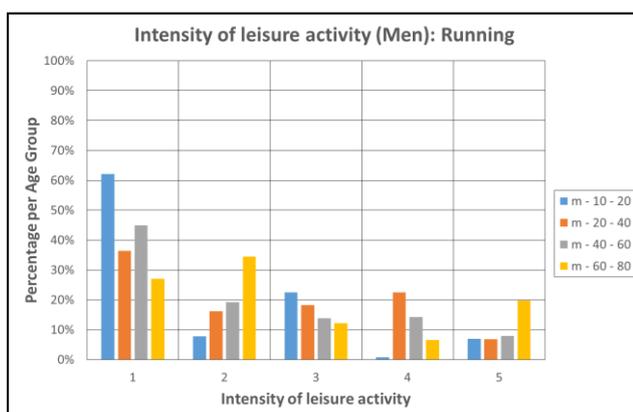
Leisure activity: cycling / biking			
Mean value of assessment per gender and age group			
Age group	m	f	Mean value
10 - 20	3.1	2.8	3.0
20 - 40	2.6	2.6	2.6
40 - 60	2.7	2.7	2.7
60 - 80	2.9	2.9	2.9
Mean value	2.6	2.6	2.6



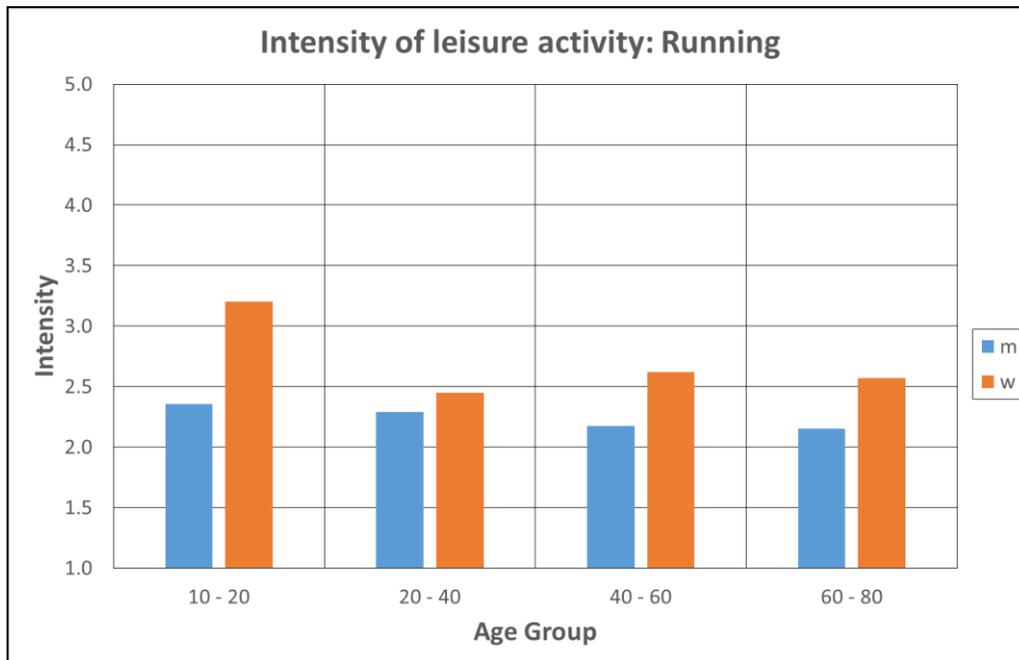
- For divers cycling / biking is a sometimes-complementary leisure activity. Intensity on average: 2.6 (“occasionally”)
- 24% of men and 31% of women practice it "often" to "intensive", 33% of men and 35% of women practice it "occasionally".

11.4 Leisure Activity: Running / Jogging

Leisure activity: running / jogging					
Share of assessment per gender and age group					
Assessment	Men				Mean value
	10 - 20	20 - 40	40 - 60	60 - 80	
1	62%	36%	45%	27%	40%
2	8%	16%	19%	34%	18%
3	22%	18%	14%	12%	17%
4	1%	22%	14%	7%	16%
5	7%	7%	8%	20%	9%
Total	100%	100%	100%	100%	100%
Assessment	Women				Mean value
	10 - 20	20 - 40	40 - 60	60 - 80	
1	0%	37%	51%	7%	30%
2	72%	12%	8%	66%	25%
3	0%	26%	18%	21%	20%
4	28%	18%	16%	7%	19%
5	0%	8%	7%	0%	6%
Total	100%	100%	100%	100%	100%



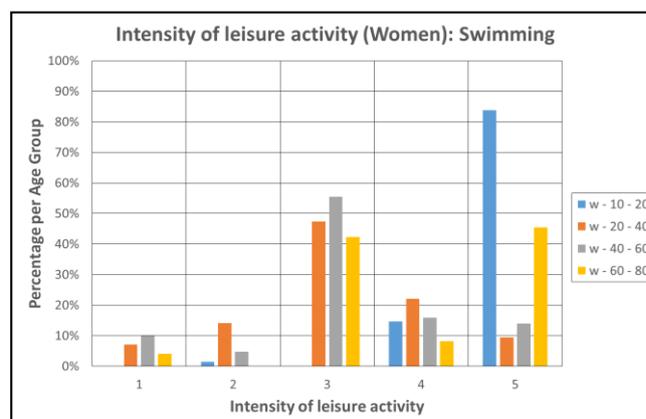
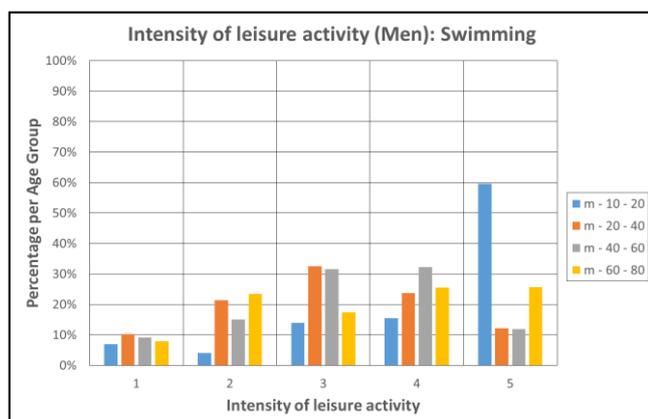
Leisure activities: running / jogging			
Mean value of assessment per gender and age group			
Age group	m	f	Mean value
10 - 20	2.4	3.2	2.6
20 - 40	2.3	2.4	2.3
40 - 60	2.2	2.6	2.2
60 - 80	2.2	2.6	2.2
Mean value	2.3	2.5	2.3



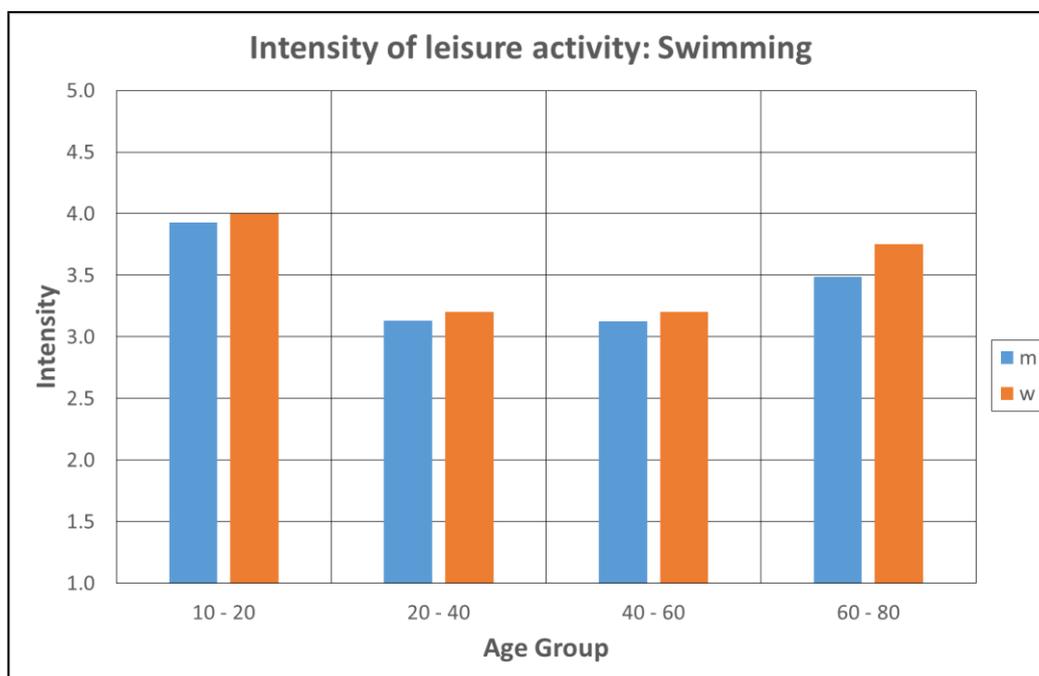
- Running / jogging is also an occasional activity, more often by women than men. Average intensity: women 2.5 (occasionally), men 2.3
- 25% of men and women run or jog “often” to “intensive“.
- However, 58 % of men and 55% of women run or jog "rarely" or "never“.

11.5 Leisure Activity: Swimming

Leisure activity: swimming					
Share of assessment per gender and age group					
	Men				
Assessment	10 - 20	20 - 40	40 - 60	60 - 80	Mean value
1	7%	10%	9%	8%	9%
2	4%	21%	15%	23%	18%
3	14%	33%	32%	17%	29%
4	15%	24%	32%	26%	25%
5	60%	12%	12%	26%	19%
Total	100%	100%	100%	100%	100%
	Women				
	10 - 20	20 - 40	40 - 60	60 - 80	Mean value
1	0%	7%	10%	4%	6%
2	1%	14%	5%	0%	10%
3	0%	47%	55%	42%	39%
4	15%	22%	16%	8%	19%
5	84%	9%	14%	45%	25%
Total	100%	100%	100%	100%	100%



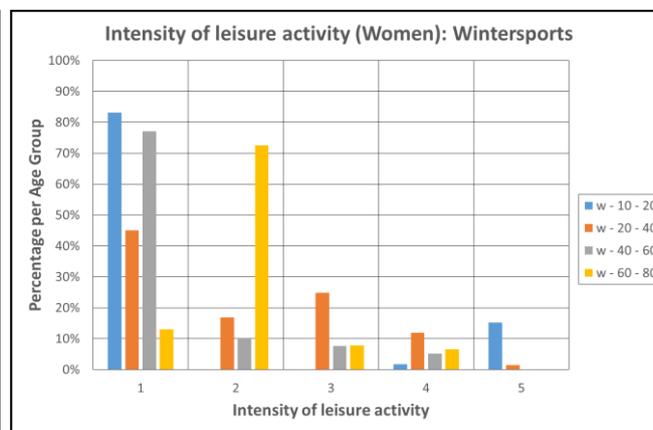
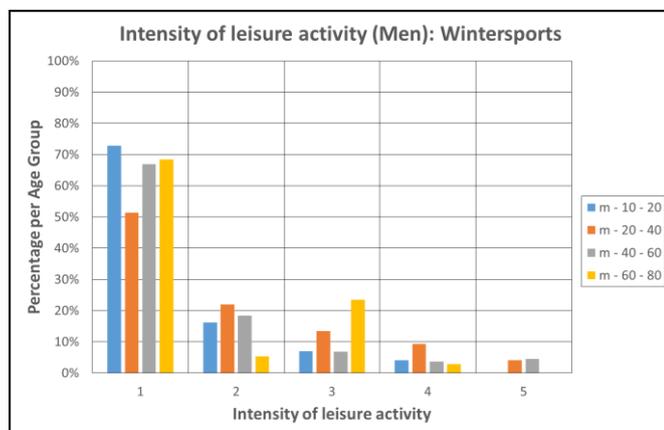
Leisure activity: swimming			
Mean value of assessment per gender and age group			
Age Group	m	f	Mean value
10 - 20	3.9	4.0	3.9
20 - 40	3.1	3.2	3.1
40 - 60	3.1	3.2	3.1
60 - 80	3.5	3.8	3.5
Mean value	3.2	3.2	3.2



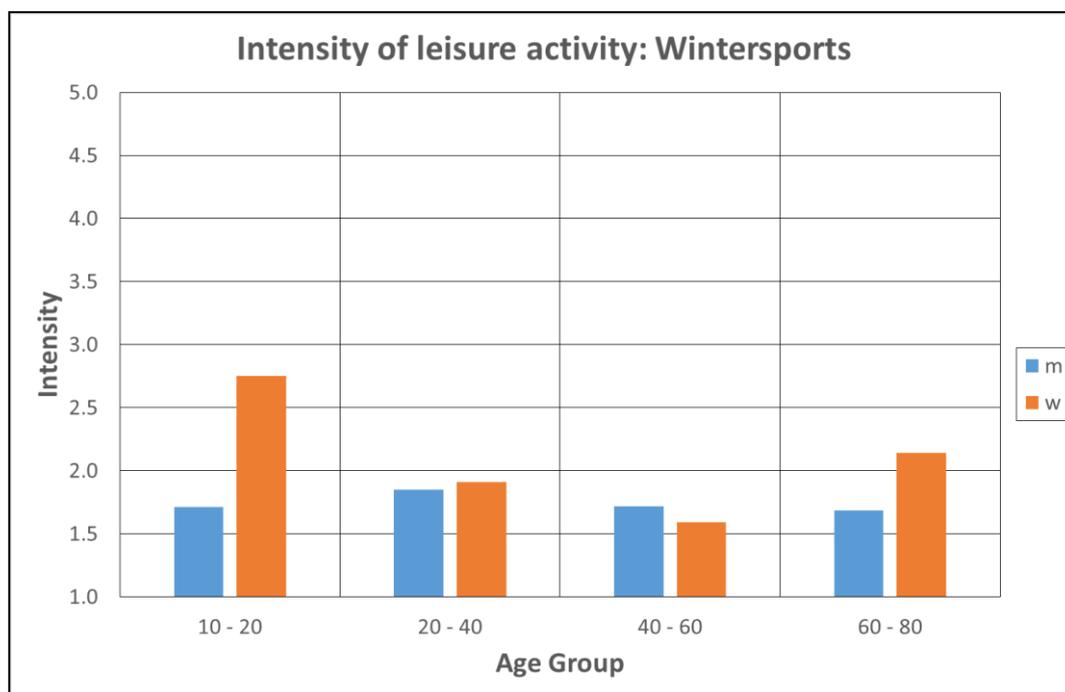
- Swimming is a popular leisure activity for divers, especially for juniors and seniors. Averaged intensity: 3.2 (“occasionally” to “often”).
- 44% of men and women swim “often” to “intensive”.

11.6 Leisure Activity: Winter Sports

Leisure activity: winter sports					
Share of assessment per gender and age group					
	Men				
Assessment	10 - 20	20 - 40	40 - 60	60 - 80	Mean value
1	73%	51%	67%	68%	59%
2	16%	22%	18%	5%	19%
3	7%	13%	7%	23%	12%
4	4%	9%	4%	3%	7%
5	0%	4%	5%	0%	3%
Total	100%	100%	100%	100%	100%
	Women				
	10 - 20	20 - 40	40 - 60	60 - 80	Mean value
1	83%	45%	77%	13%	52%
2	0%	17%	10%	73%	16%
3	0%	25%	8%	8%	19%
4	2%	12%	5%	7%	9%
5	15%	1%	0%	0%	4%
Total	100%	100%	100%	100%	100%



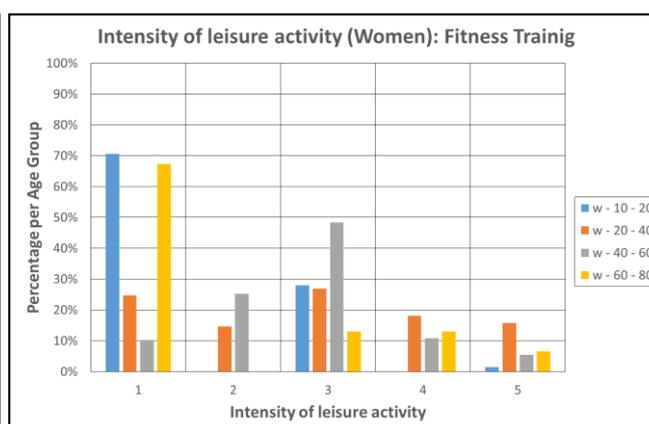
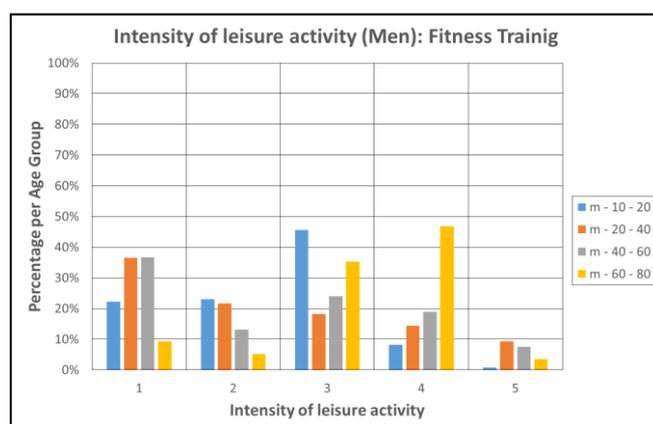
Leisure activity: winter sports			
Mean value of assessment per gender and age group			
Age group	m	f	Mean value
10 - 20	1.7	2.8	1.9
20 - 40	1.9	1.9	1.9
40 - 60	1.7	1.6	1.7
60 - 80	1.7	2.1	1.7
Mean value	1.8	1.9	1.8



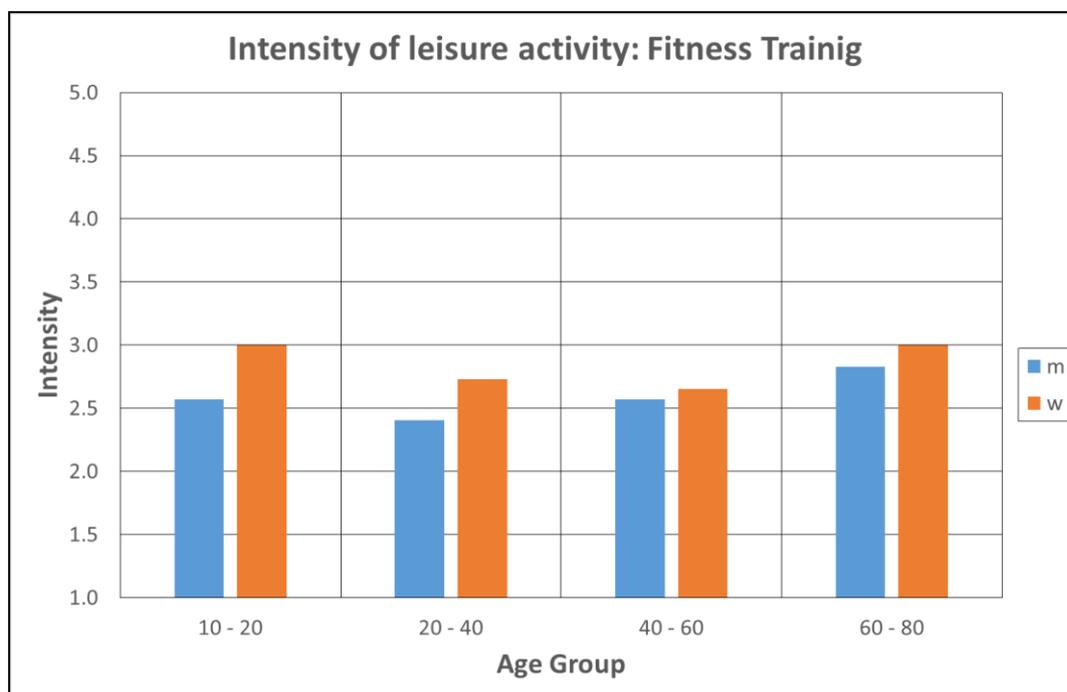
- Winter sport is not an important leisure activity among divers. Average of intensity: 1.8 (rather rare).
- Only 10% of men and 13% of women practice it "often" to "intensive".
- 78% of men and 68% of women practice winter sports "rarely" or "never".

11.7 Leisure Activity: Fitness Training

Leisure Activity: Fitness Training					
Share of assessment per gender and age group					
	Men				
Assessment	10 - 20	20 - 40	40 - 60	60 - 80	Mean value
1	22%	36%	37%	9%	32%
2	23%	22%	13%	5%	18%
3	46%	18%	24%	35%	24%
4	8%	14%	19%	47%	18%
5	1%	9%	7%	4%	7%
Total	100%	100%	100%	100%	100%
	Women				
	10 - 20	20 - 40	40 - 60	60 - 80	Mean value
1	71%	25%	10%	67%	34%
2	0%	15%	25%	0%	12%
3	28%	27%	48%	13%	28%
4	0%	18%	11%	13%	14%
5	1%	16%	5%	7%	12%
Total	100%	100%	100%	100%	100%



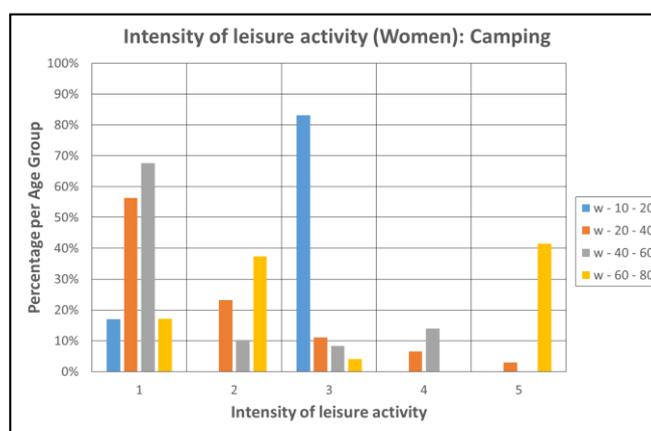
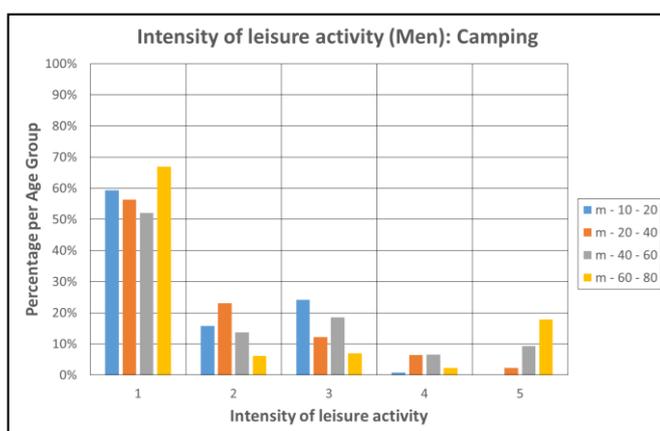
Leisure activity: Fitness Training			
Mean value of assessment per gender and age group			
Age Group	m	f	Mean value
10 - 20	2.6	3.0	2.7
20 - 40	2.4	2.7	2.5
40 - 60	2.6	2.7	2.6
60 - 80	2.8	3.0	2.9
Mean value	2.5	2.7	2.5



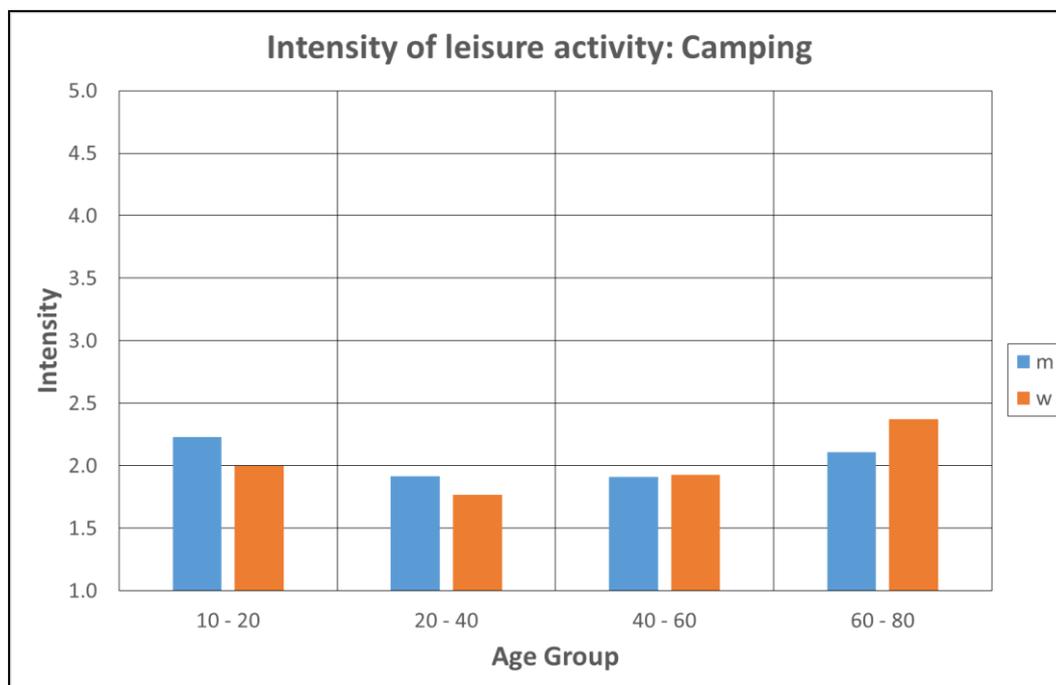
- Fitness Training is popular at men and especially at women. Averaged intensity: men 2.5, women 2.7 (occasionally).
- 25% of men and 26% of women practice Fitness Training "often" to "intensive".
- 24% of men and 28% of women practice it "occasionally".
- 50% of men and 46% of women are not interested in Fitness Training (rarely or never).

11.8 Leisure Activity: Camping / Caravanning

Leisure Activity: Camping / Caravanning					
Share of assessment per gender and age group					
	Men				
Assessment	10 - 20	20 - 40	40 - 60	60 - 80	Mean value
1	59%	56%	52%	67%	57%
2	16%	23%	14%	6%	18%
3	24%	12%	18%	7%	14%
4	1%	6%	7%	2%	5%
5	0%	2%	9%	18%	5%
Total	100%	100%	100%	100%	100%
	Women				
	10 - 20	20 - 40	40 - 60	60 - 80	Mean value
1	17%	56%	68%	17%	48%
2	0%	23%	10%	37%	19%
3	83%	11%	8%	4%	22%
4	0%	7%	14%	0%	6%
5	0%	3%	0%	41%	5%
Total	100%	100%	100%	100%	100%



Leisure Activity: Camping / Caravanning			
Mean value of assessment per gender and age group			
Age Group	m	f	Mean value
10 - 20	2.2	2.0	2.2
20 - 40	1.9	1.8	1.9
40 - 60	1.9	1.9	1.9
60 - 80	2.1	2.4	2.1
Mean value	1.9	1.8	1.9



- On average camping or caravanning is particularly not attractive at divers. Averaged intensity: 1.8 (rather rare).
- On average approx. 10% of diving men and women (and 20% of men aged >60) go for camping / caravanning "often" to "intensive".
- Young men and women more "occasionally".

12 Information Channels

Question: "Which of the following information channels do you use for your hobbies?"

- Associations, club
- Friends
- Trade press
- Internet
- Social Media (Facebook etc.)
- Shows, fairs, events
- Diving schools, diving bases
- Travel agencies

The use per channel should be marked at a scale from 1 (never) to 5 (intensive).

It was then calculated – by applying the correction factors – in terms of the projected number of divers

- The frequency of assessment per age group divided into Scuba Divers and Leisure Divers

Information on the number of cases using the example "Information channels: Association"

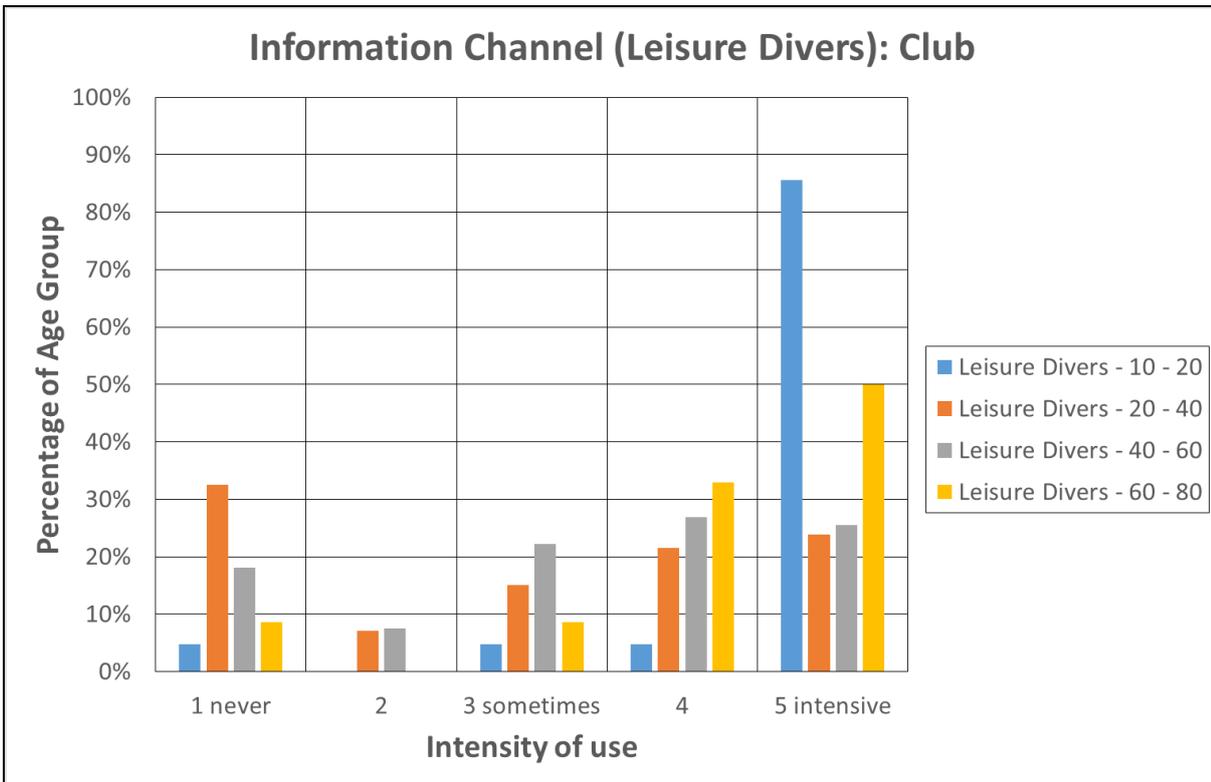
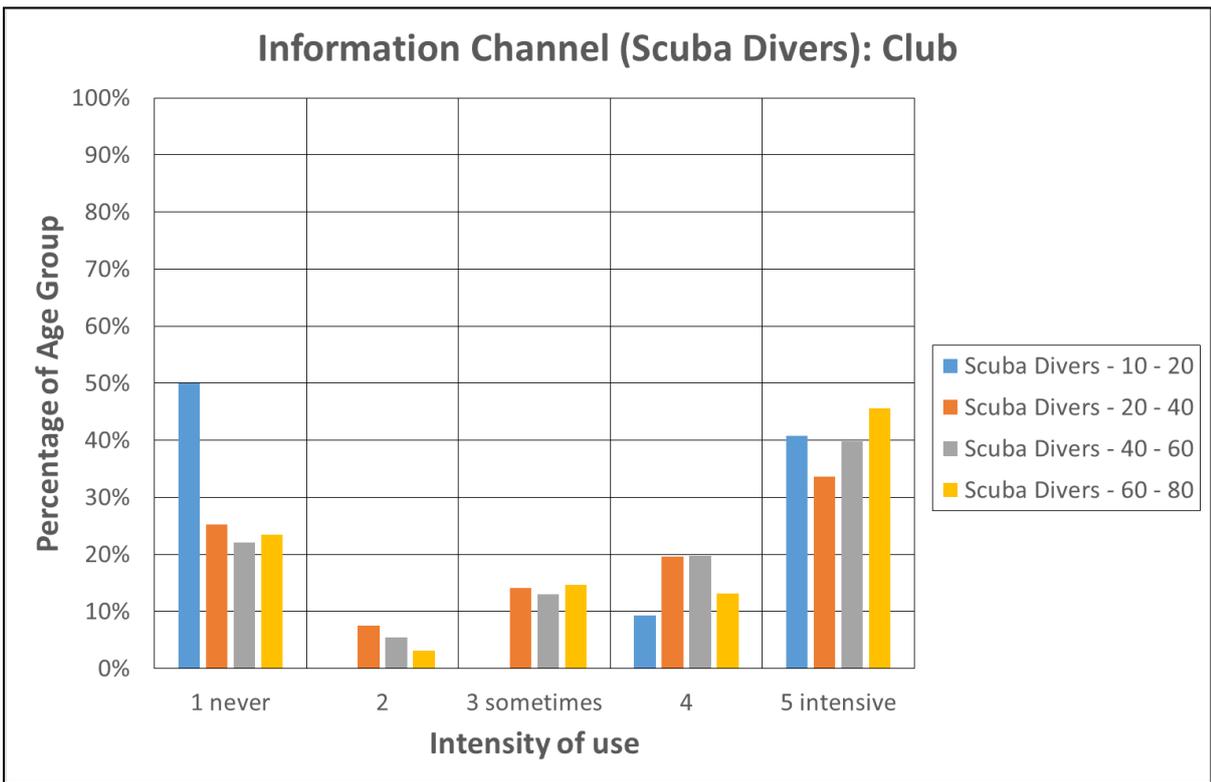
Number of Cases					
	Scuba Divers				
Assessment	10 - 20	20 - 40	40 - 60	60 - 80	Total
1 never	2	161	49	12	224
2		48	12	2	62
3 occasionally		89	28	9	126
4	1	123	44	8	176
5 intensive	5	210	86	26	327
Total	8	631	219	57	915
	Leisure Divers				
Assessment	10 - 20	20 - 40	40 - 60	60 - 80	Total
1	1	25	3	1	30
2		5	1		6
3	1	11	3	1	16
4	1	16	4	2	23
5	8	17	4	4	33
Total	11	74	15	8	108

- As already mentioned, the detailed results at Leisure divers should be treated with caution due to the small number of cases and despite the correction factors.
- Especially the age group 10 to 20 at Scuba Divers is weakly represented with only 8 cases.

12.1 Information Channels: Association, Club

Information Channel: Association					
Scuba Divers					
Assessment	10 - 20	20 - 40	40 - 60	60 - 80	Mean value
1 never	50%	25%	22%	23%	25%
2	0%	7%	5%	3%	6%
3 occasionally	0%	14%	13%	15%	14%
4	9%	20%	20%	13%	19%
5 intensive	41%	34%	40%	46%	36%
Total	100%	100%	100%	100%	100%
Leisure Divers					
Assessment	10 - 20	20 - 40	40 - 60	60 - 80	Mean value
1	5%	32%	18%	9%	22%
2	0%	7%	7%	0%	5%
3	5%	15%	22%	9%	13%
4	5%	22%	27%	33%	20%
5	86%	24%	25%	50%	40%
Total	100%	100%	100%	100%	100%

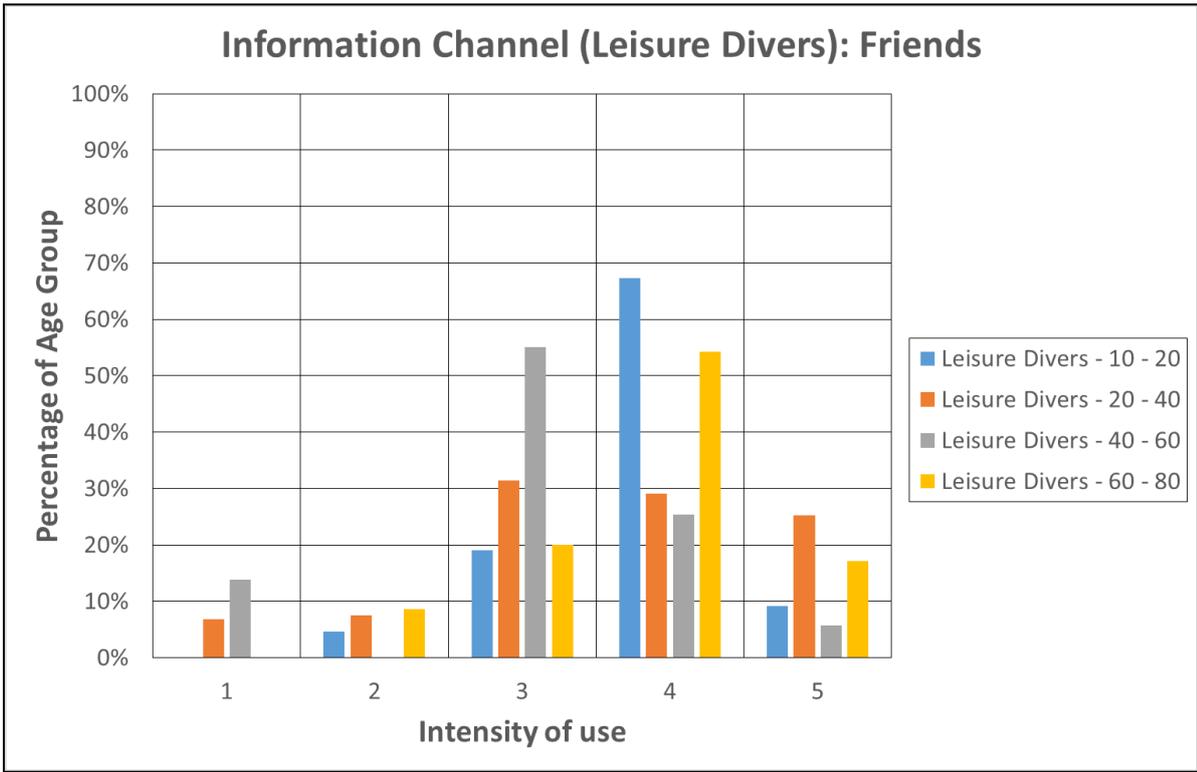
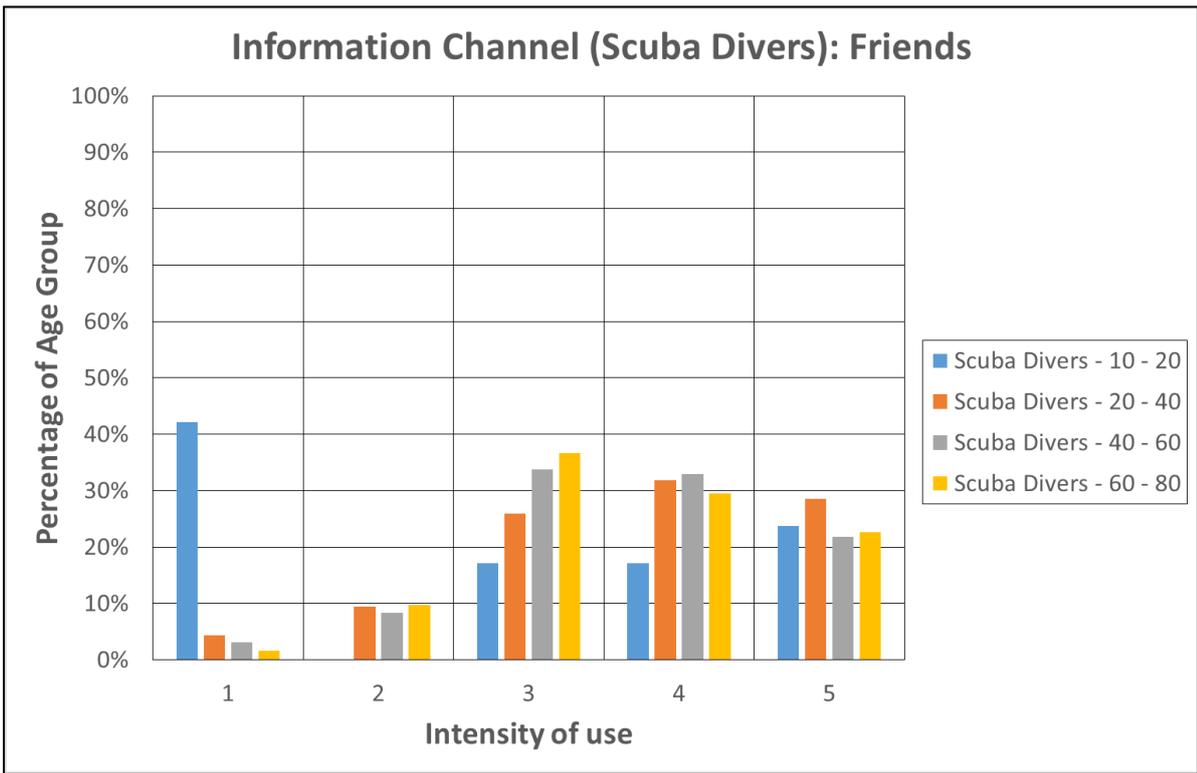
- For 55% of Scuba Divers and approx. 60% of Leisure Divers the first source of information for their hobby is their association; "often" - "intensive".
- 31% of Scuba Divers and 27% of Leisure Divers do not have any or only seldom communication for their hobby with an association.



12.2 Information Channels: Circle of Friends

Information Channel: Circle of Friends					
Scuba Divers					
Assessment	10 - 20	20 - 40	40 - 60	60 - 80	Mean value
1	42%	4%	3%	2%	5%
2	0%	9%	8%	10%	9%
3	17%	26%	34%	37%	29%
4	17%	32%	33%	29%	32%
5	24%	28%	22%	23%	26%
Total	100%	100%	100%	100%	100%
Leisure Divers					
Assessment	10 - 20	20 - 40	40 - 60	60 - 80	Mean value
1	0%	7%	14%	0%	5%
2	5%	8%	0%	9%	6%
3	19%	31%	55%	20%	30%
4	67%	29%	25%	54%	39%
5	9%	25%	6%	17%	19%
Total	100%	100%	100%	100%	100%

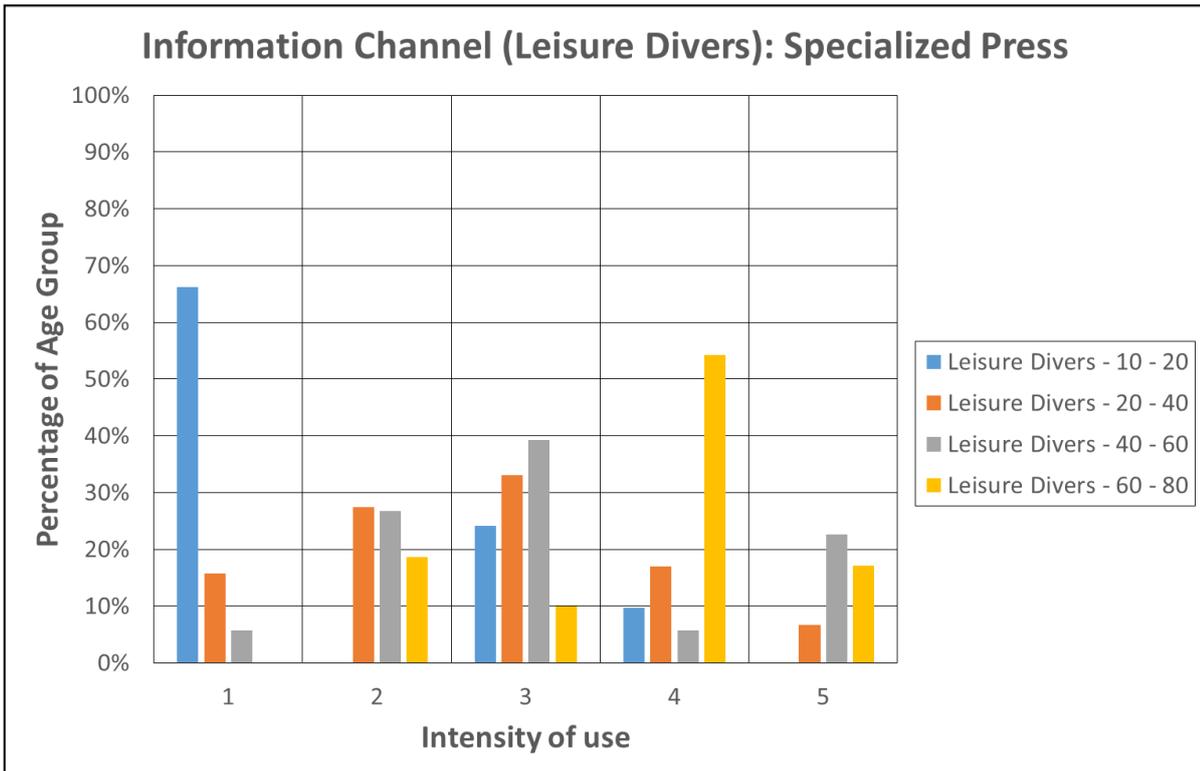
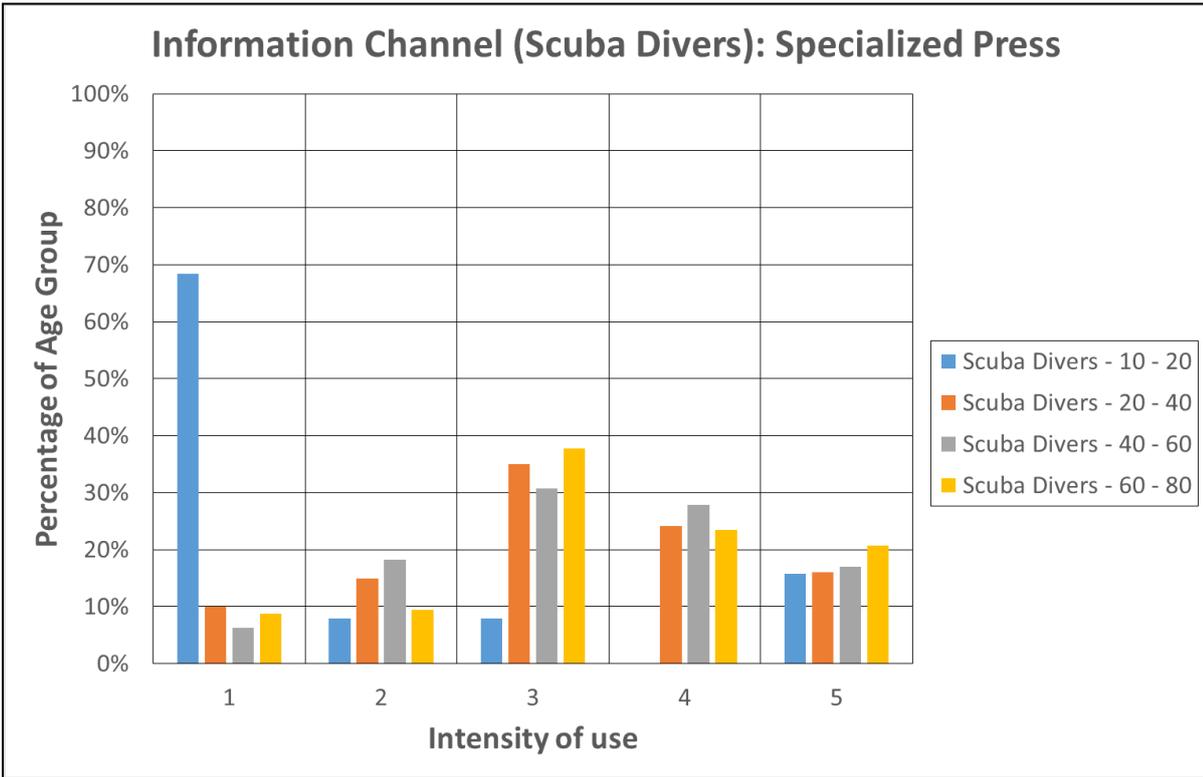
- Largely unaffected by age 58% of Scuba divers and Leisure divers get information “often” to “intensive” by “circle of friends”.
- Approx. 30% of divers use the source of information “circle of friends” at least “occasionally” with increasing age.



12.3 Information Channels: Trade Press

Information Channels: Trade Press					
	Scuba Divers				
Assessment	10 - 20	20 - 40	40 - 60	60 - 80	Mean value
1	68%	10%	6%	9%	10%
2	8%	15%	18%	9%	15%
3	8%	35%	31%	38%	34%
4	0%	24%	28%	23%	25%
5	16%	16%	17%	21%	17%
Total	100%	100%	100%	100%	100%
	Leisure Divers				
Assessment	10 - 20	20 - 40	40 - 60	60 - 80	Mean value
1	66%	16%	6%	0%	23%
2	0%	27%	27%	19%	21%
3	24%	33%	39%	10%	29%
4	10%	17%	6%	54%	18%
5	0%	7%	23%	17%	8%
Total	100%	100%	100%	100%	100%

- 42% of Scuba Divers and only 26% of Leisure Divers obtain information “often” to “intensive” from the specialized press.
I.e.: Especially Scuba Divers read the trade press.
- 49% of Scuba Divers and 50% of Leisure Divers read the trade press only “occasionally” to “rarely”.
- An interesting trend is:
Among the few cases in the younger generation <20 70% do never consult the trade press.

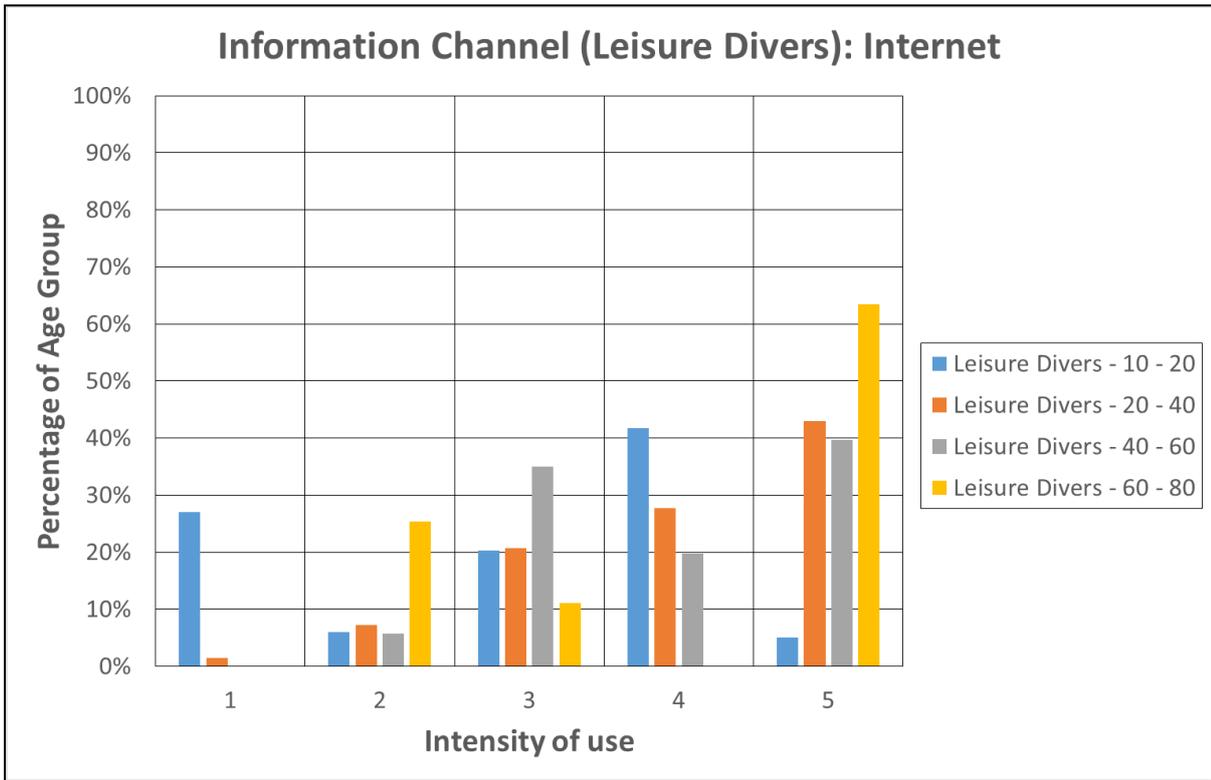
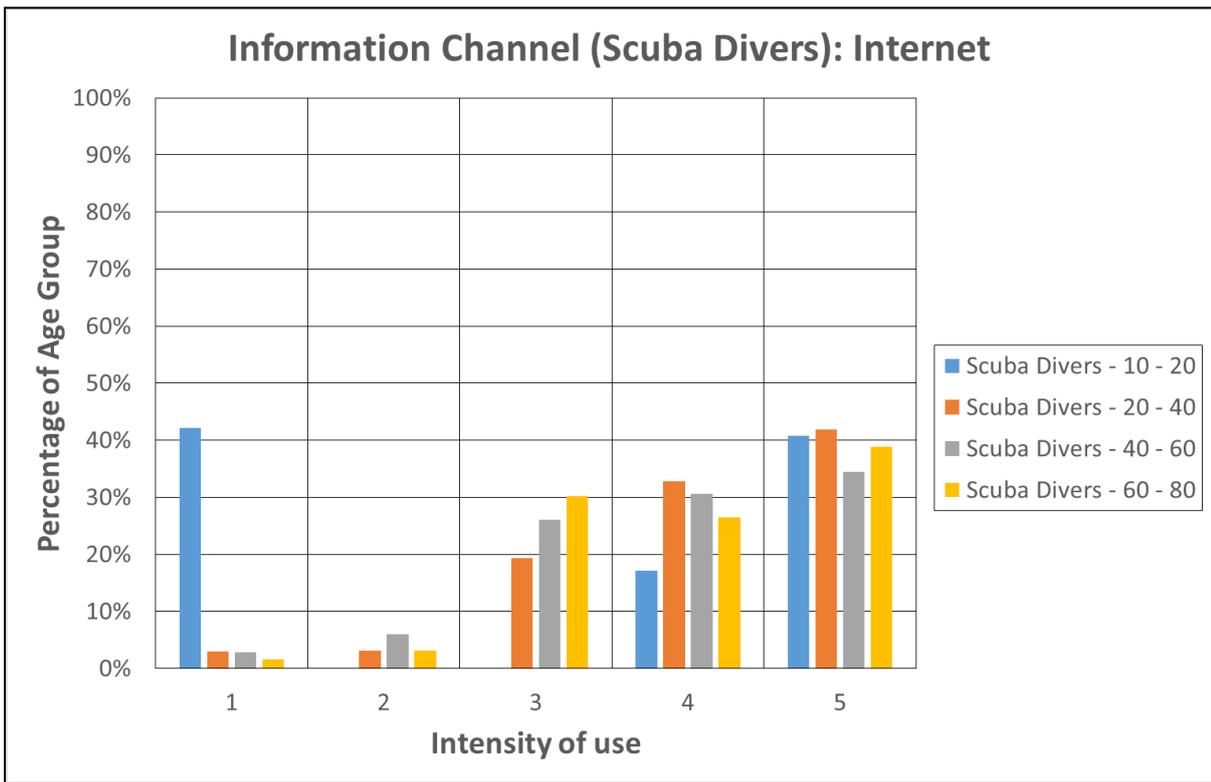


12.4 Information Channels: Internet

Information Channels: Internet					
	Scuba Divers				
Assessment	10 - 20	20 - 40	40 - 60	60 - 80	Mean value
1	42%	3%	3%	2%	4%
2	0%	3%	6%	3%	4%
3	0%	19%	26%	30%	22%
4	17%	33%	31%	26%	31%
5	41%	42%	34%	39%	40%
Total	100%	100%	100%	100%	100%
	Leisure Divers				
Assessment	10 - 20	20 - 40	40 - 60	60 - 80	Mean value
1	27%	1%	0%	0%	6%
2	6%	7%	6%	25%	9%
3	20%	21%	35%	11%	21%
4	42%	28%	20%	0%	27%
5	5%	43%	40%	63%	37%
Total	100%	100%	100%	100%	100%

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- The internet is for 71% of Scuba 'Divers and 64% of Leisure Divers the main source of information "often" to "intensive", even for the older generation.
- Only 8% of Scuba divers and 15% of Leisure Divers use this source "rarely" or "never".

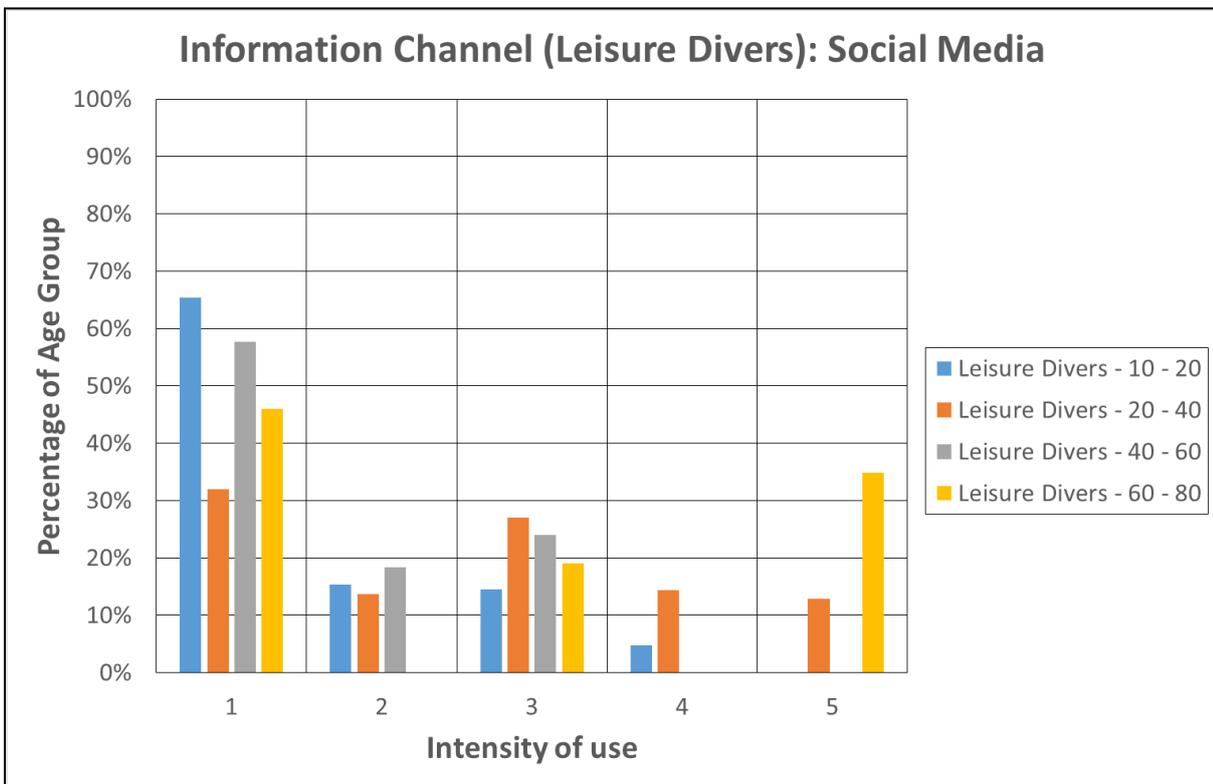
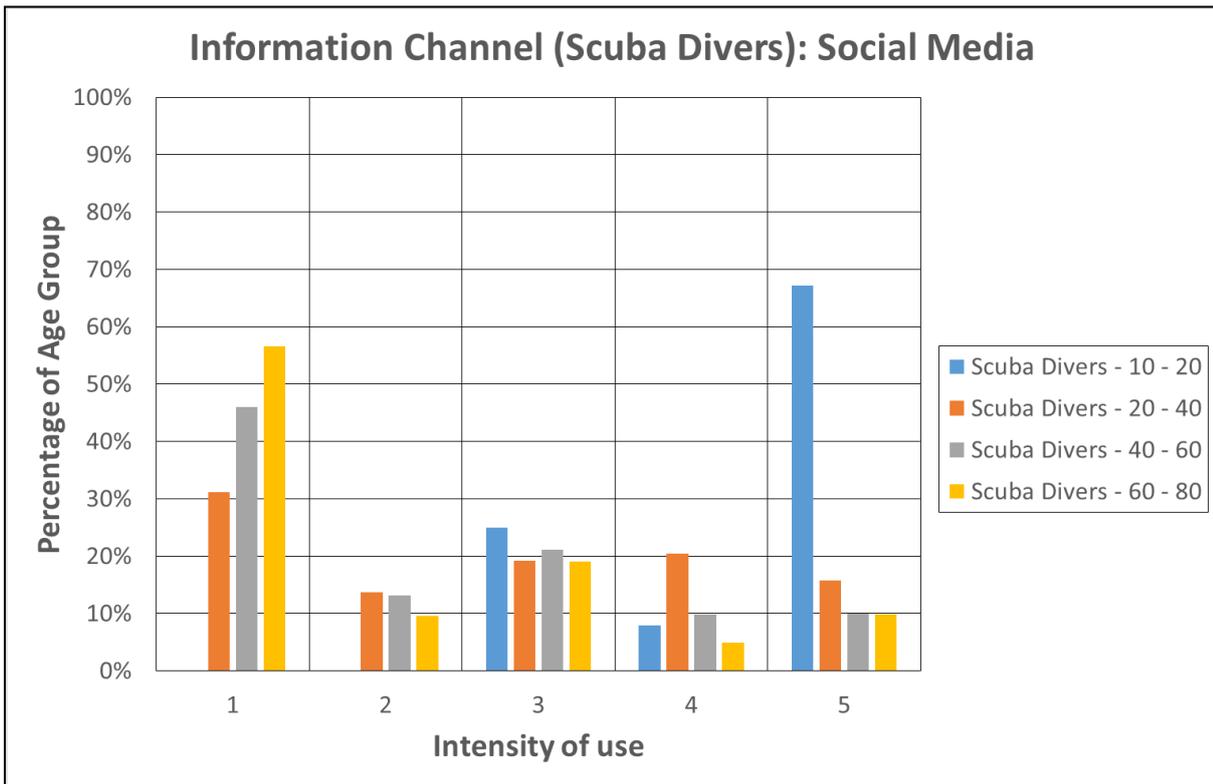


12.5 Information Channels: Social Media (Facebook etc.)

Information Channel: Social Media (Facebook etc.)					
Scuba Divers					
Assessment	10 - 20	20 - 40	40 - 60	60 - 80	Mean value
1	0%	31%	46%	57%	36%
2	0%	14%	13%	10%	13%
3	25%	19%	21%	19%	20%
4	8%	20%	10%	5%	16%
5	67%	16%	10%	10%	15%
Total	100%	100%	100%	100%	100%
Leisure Divers					
Assessment	10 - 20	20 - 40	40 - 60	60 - 80	Mean value
1	65%	32%	58%	46%	43%
2	15%	14%	18%	0%	13%
3	14%	27%	24%	19%	23%
4	5%	14%	0%	0%	9%
5	0%	13%	0%	35%	11%
Total	100%	100%	100%	100%	100%

It is surprising, that beside intensive use of internet

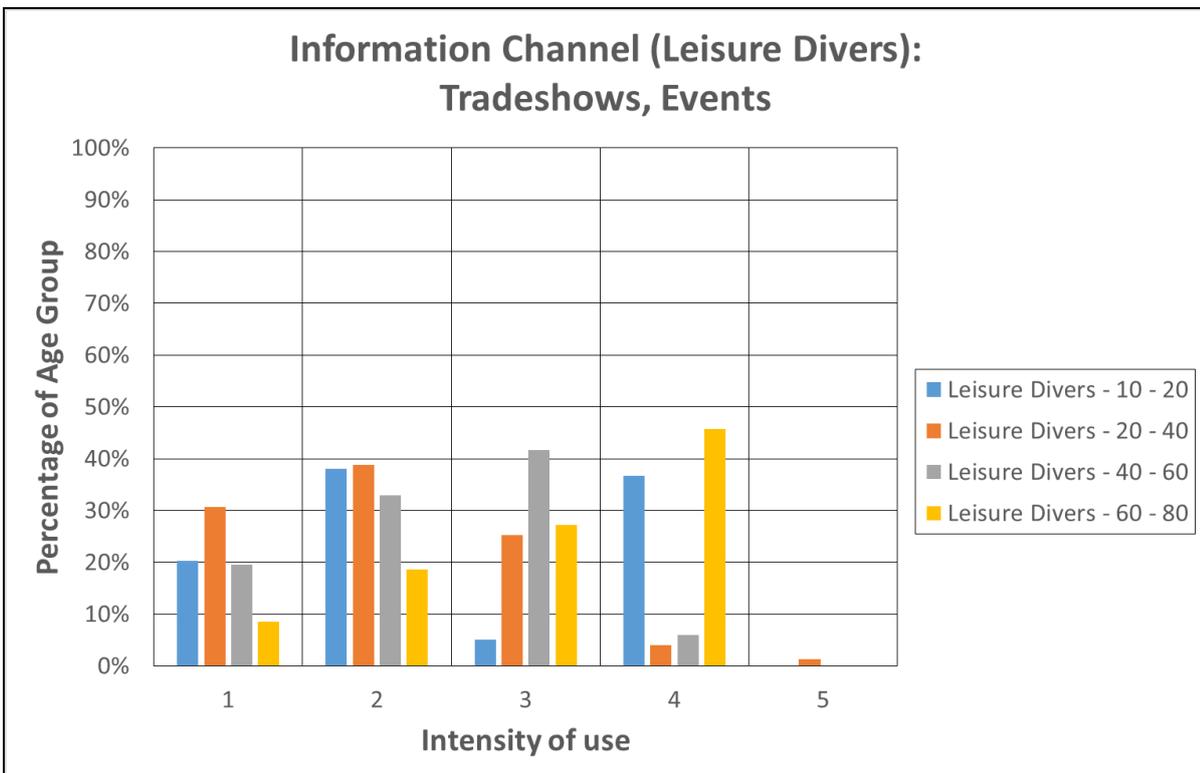
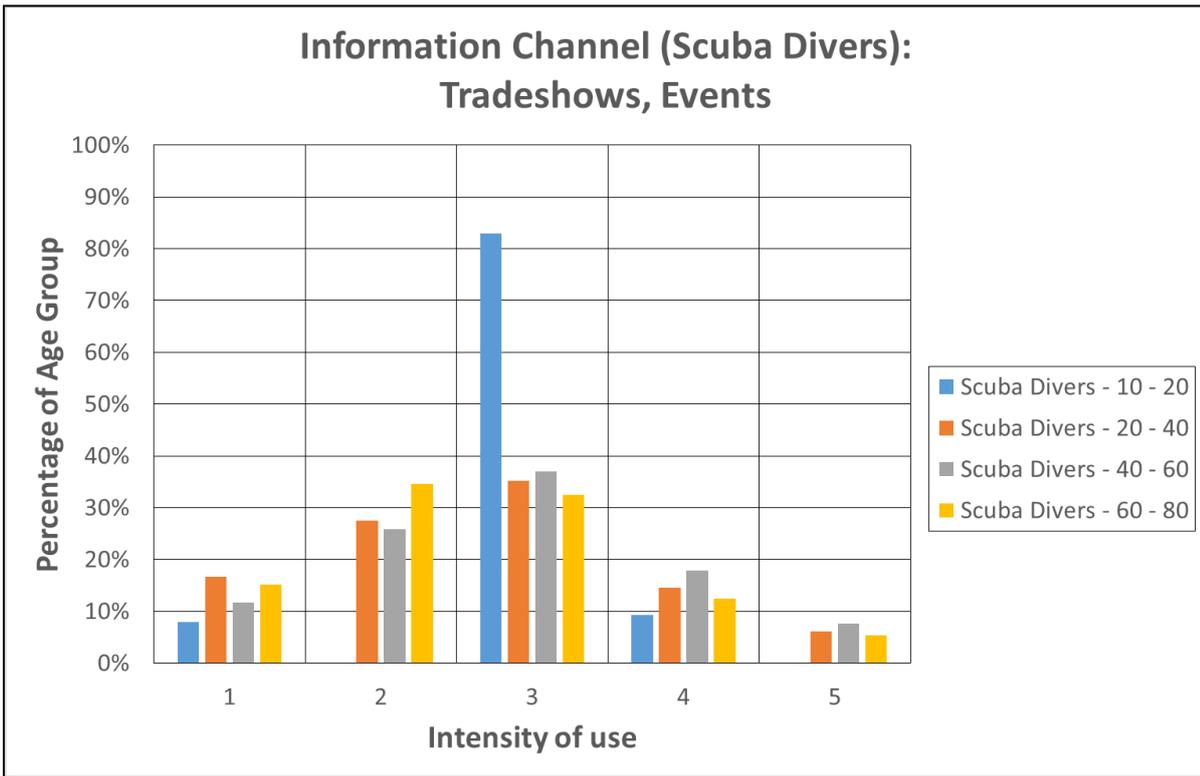
- 49% of Scuba Divers and 56% of Leisure Divers use the social media as information source for their hobby “rarely“ or “never“.
- Approx. 20% only use it “occasionally“.
- 31% of Scuba Divers and only 20% of Leisure Divers use it "often" to "intensive".



12.6 Information Channels: Shows, Events

Information Channels: Shows, Events					
	Scuba Divers				
Assessment	10 - 20	20 - 40	40 - 60	60 - 80	Mean value
1	8%	17%	12%	15%	15%
2	0%	27%	26%	35%	27%
3	83%	35%	37%	32%	36%
4	9%	14%	18%	12%	15%
5	0%	6%	8%	5%	6%
Total	100%	100%	100%	100%	100%
	Leisure Divers				
Assessment	10 - 20	20 - 40	40 - 60	60 - 80	Mean value
1	20%	31%	19%	9%	25%
2	38%	39%	33%	19%	36%
3	5%	25%	42%	27%	23%
4	37%	4%	6%	46%	16%
5	0%	1%	0%	0%	1%
Total	100%	100%	100%	100%	100%

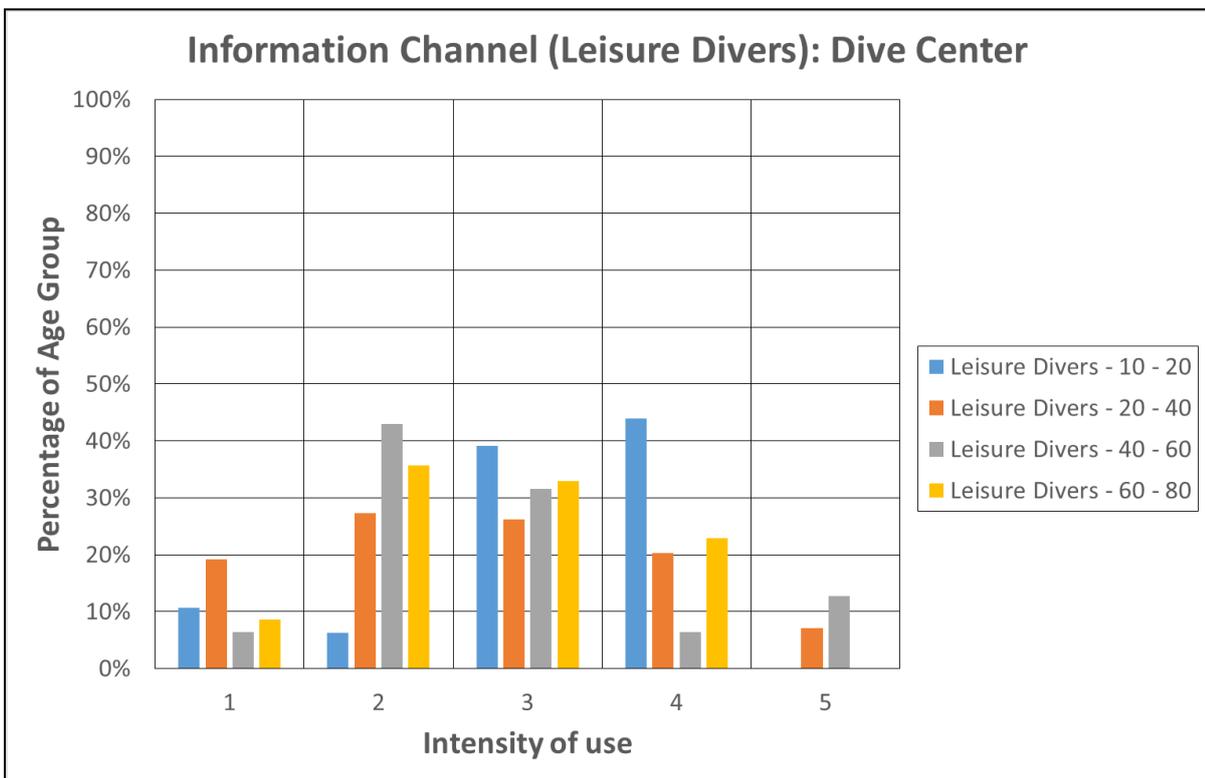
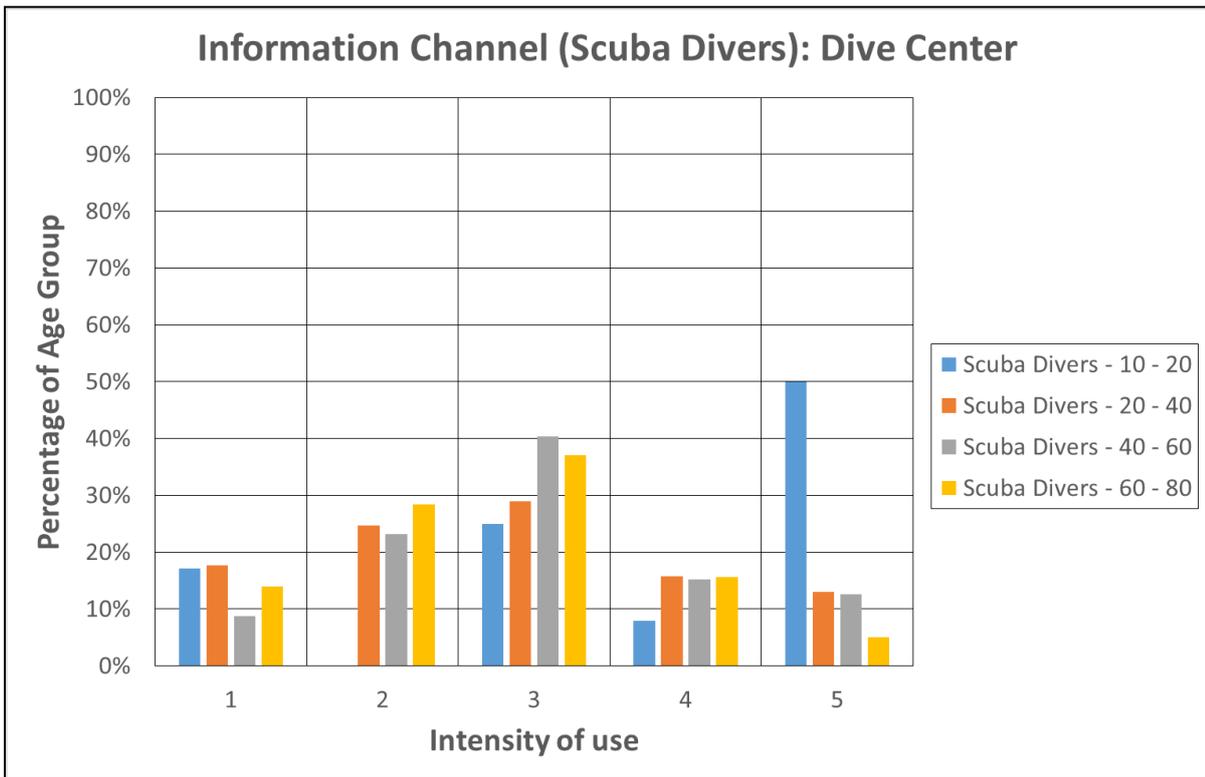
- Shows and events are not part of the intensive used sources of information, Scuba Divers: 21%, Leisure Divers: 17%.
- 36% of Scuba Divers and 23% of Leisure Divers use it "occasionally",
- 42% of Scuba Divers and 61% of Leisure Divers use it "rarely" or "never".
- I.e.: On trade shows and events, you will meet mainly Scuba Divers.



12.7 Information Channels: Diving Schools, Base

Information Channels: Diving Schools, Base					
Scuba Divers					
Assessment	10 - 20	20 - 40	40 - 60	60 - 80	Mean value
1	17%	18%	9%	14%	15%
2	0%	25%	23%	28%	24%
3	25%	29%	40%	37%	32%
4	8%	16%	15%	16%	15%
5	50%	13%	13%	5%	13%
Total	100%	100%	100%	100%	100%
Leisure Divers					
Assessment	10 - 20	20 - 40	40 - 60	60 - 80	Mean value
1	11%	19%	6%	9%	15%
2	6%	27%	43%	36%	26%
3	39%	26%	31%	33%	30%
4	44%	20%	6%	23%	24%
5	0%	7%	13%	0%	6%
Total	100%	100%	100%	100%	100%

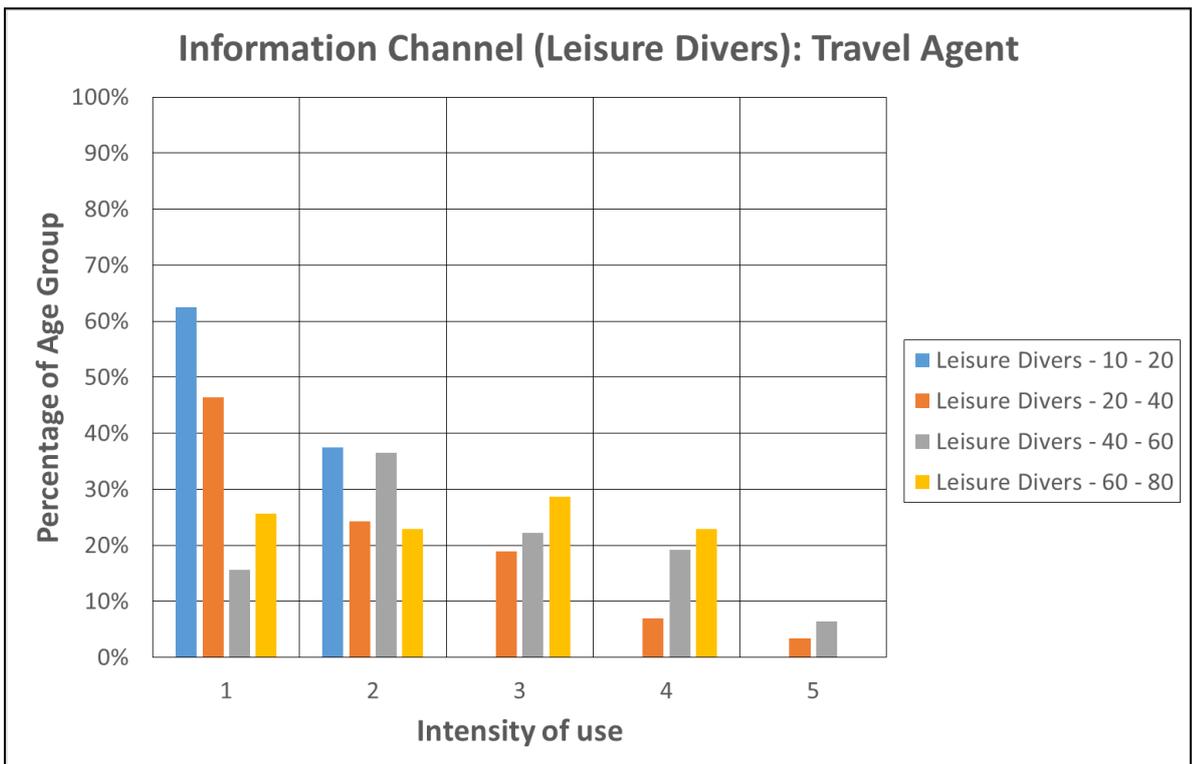
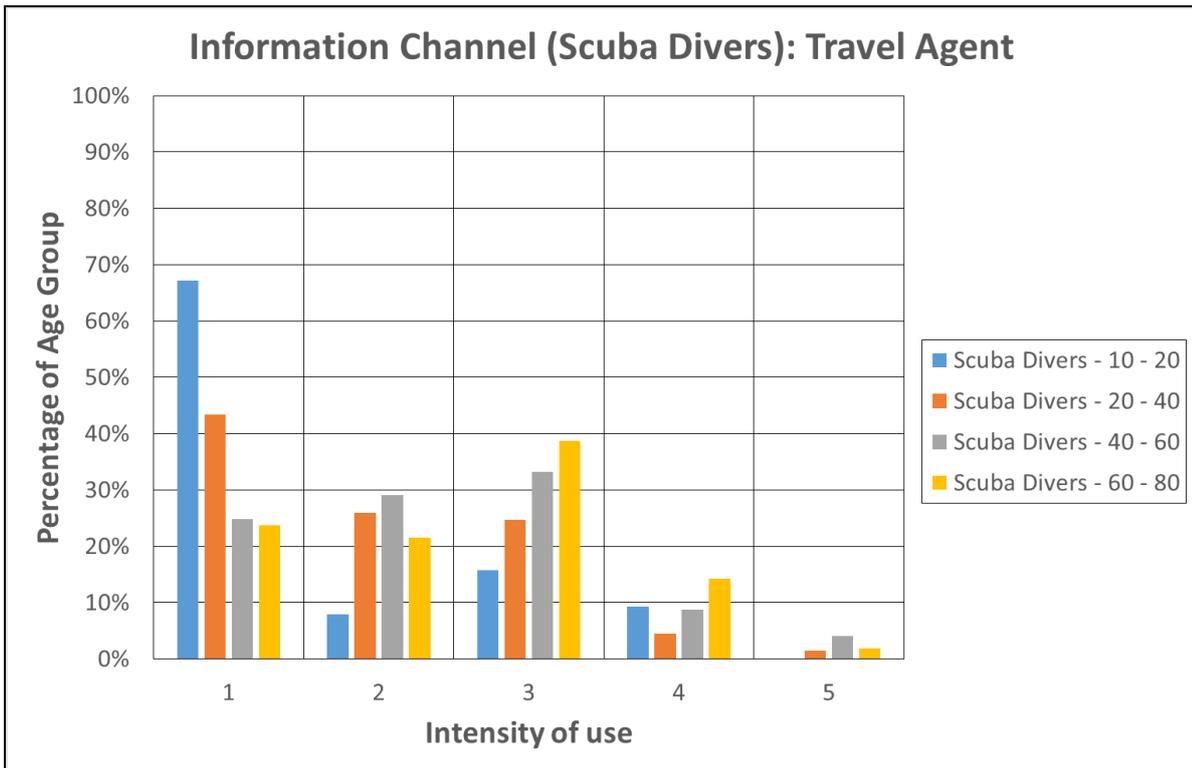
- The information provided by the diving schools reach Scuba Divers as well as Leisure Divers rather "occasionally" (approx. 30%) or "rarely" to "never" (approx. 40%).
- About 30 % of divers get information by the diving schools "often" or "intensive".



12.8 Information Channels: Travel Agencies

Information Channels: Travel Agencies					
	Scuba Divers				
Assessment	10 - 20	20 - 40	40 - 60	60 - 80	Mean value
1	67%	43%	25%	24%	38%
2	8%	26%	29%	22%	26%
3	16%	25%	33%	39%	28%
4	9%	4%	9%	14%	6%
5	0%	1%	4%	2%	2%
Total	100%	100%	100%	100%	100%
	Leisure Divers				
Assessment	10 - 20	20 - 40	40 - 60	60 - 80	Mean value
1	62%	46%	16%	26%	44%
2	38%	24%	37%	23%	28%
3	0%	19%	22%	29%	17%
4	0%	7%	19%	23%	9%
5	0%	3%	6%	0%	3%
Total	100%	100%	100%	100%	100%

- Travel agencies are rather insignificant as information distributors for divers "rarely" to "never": Scuba Divers 64%, Leisure Divers 72%.
- With increasing age of the divers, Scuba Divers only use it "occasionally" on average 28%, Leisure Divers 17%.



13 Aspects in the selection of a diving site

The question was, "Which aspects are important to you for choosing the diving site?"

Given were water-related aspects and 11 infrastructural aspects.

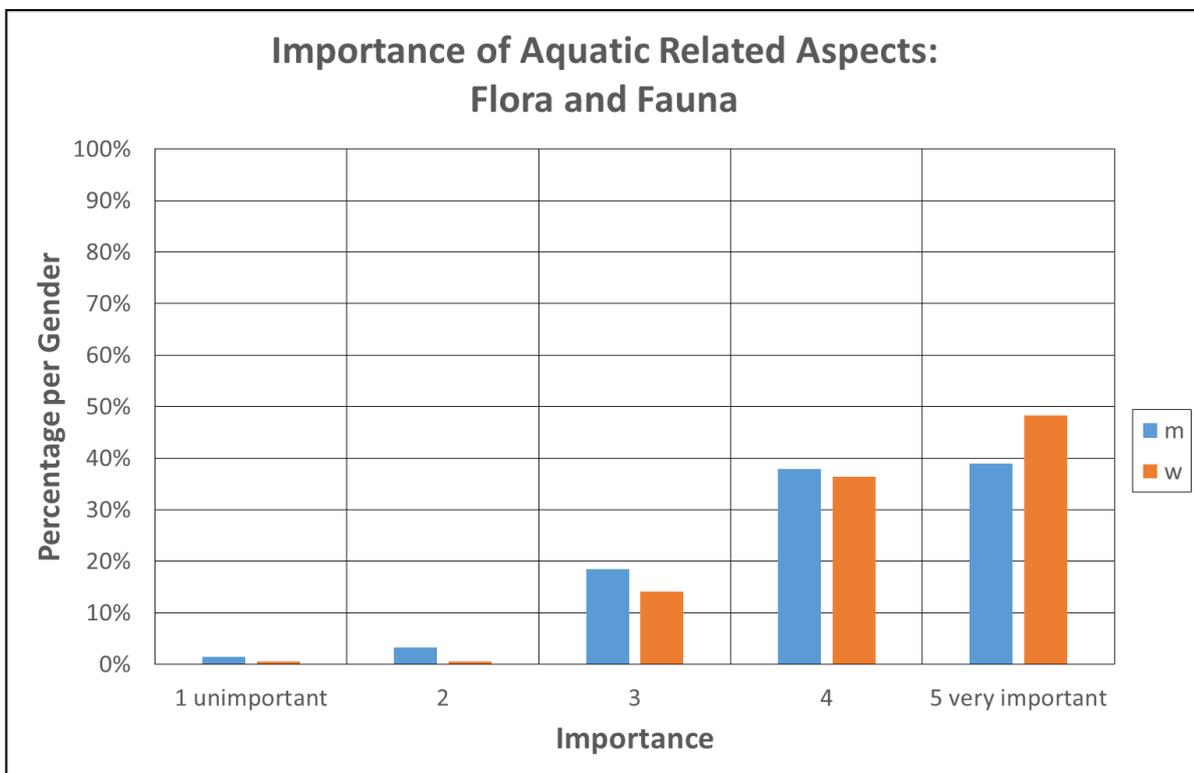
According to importance, the aspects should be marked at a scale from 1 to 5:

irrelevant	(not important)	(nice to have)	(important)	very important
1	2	3	4	5

The following evaluations show by factor the distribution of importance per gender.

13.1 Water-related: Flora and Fauna

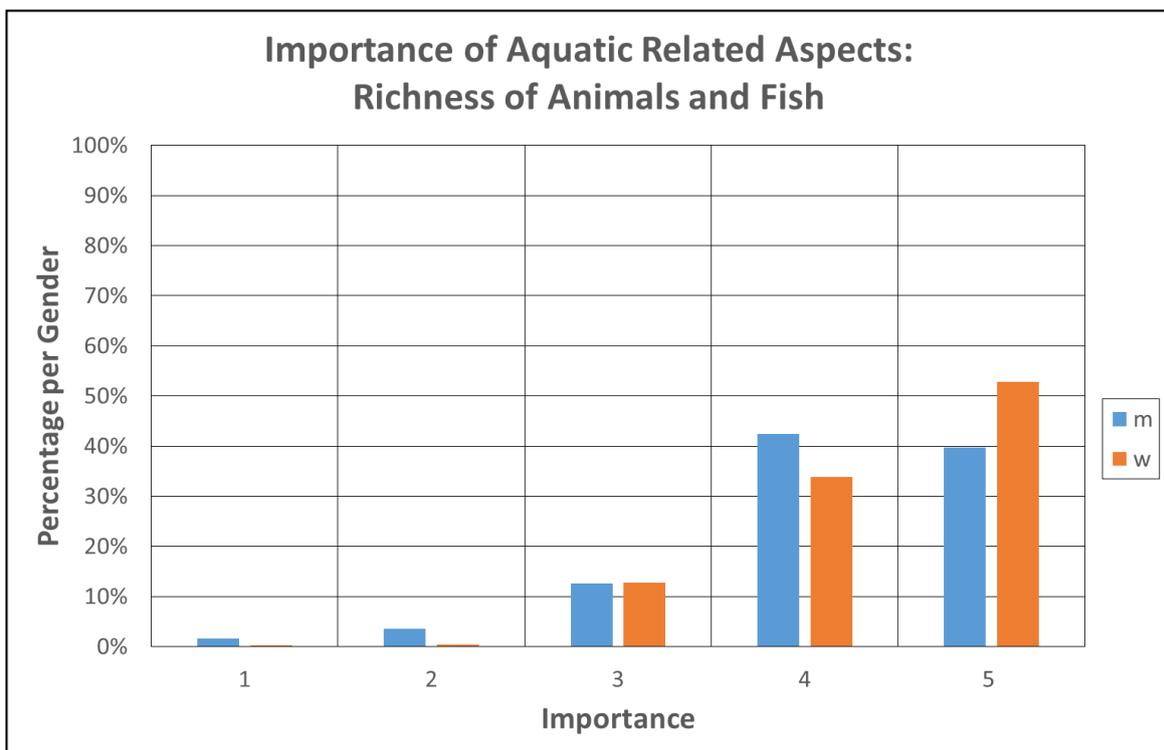
Water-related: Flora and Fauna			
	Gender		
Importance	m	f	Mean value
1 irrelevant	1%	1%	1%
2	3%	1%	3%
3	18%	14%	17%
4	38%	36%	38%
5 very important	39%	48%	42%
Mean value	100%	100%	100%



- According to 77% of men and 84% of women the flora and fauna is “important” or “very important” when choosing a diving site.

13.2 Water-related: Richness in Animal / Fish

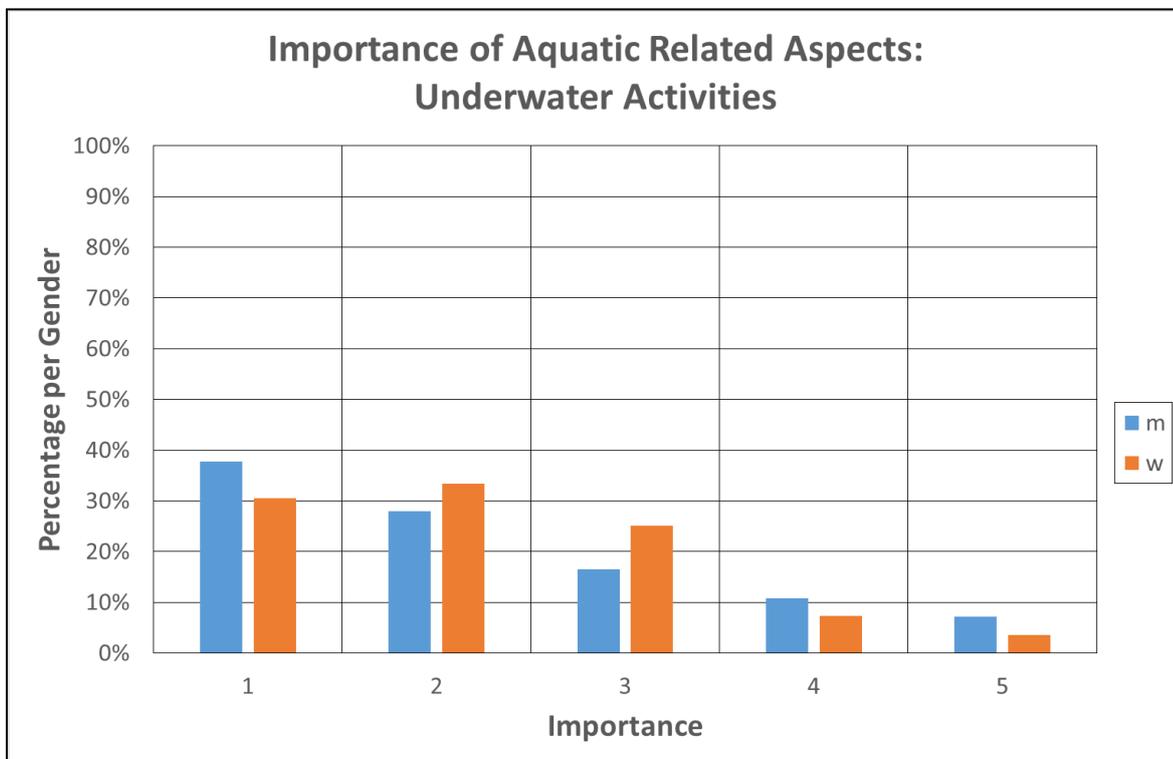
Waters-related: richness in animal/fish			
	Gender		
Importance	m	f	Mean value
1	2%	0%	1%
2	4%	0%	3%
3	13%	13%	13%
4	42%	34%	40%
5	40%	53%	43%
Mean value	100%	100%	100%



- According to 82% of men and 87% of women, the richness in animal and fish is “important” or “very important” when choosing a diving site.

13.3 Water-related: Underwater Activities

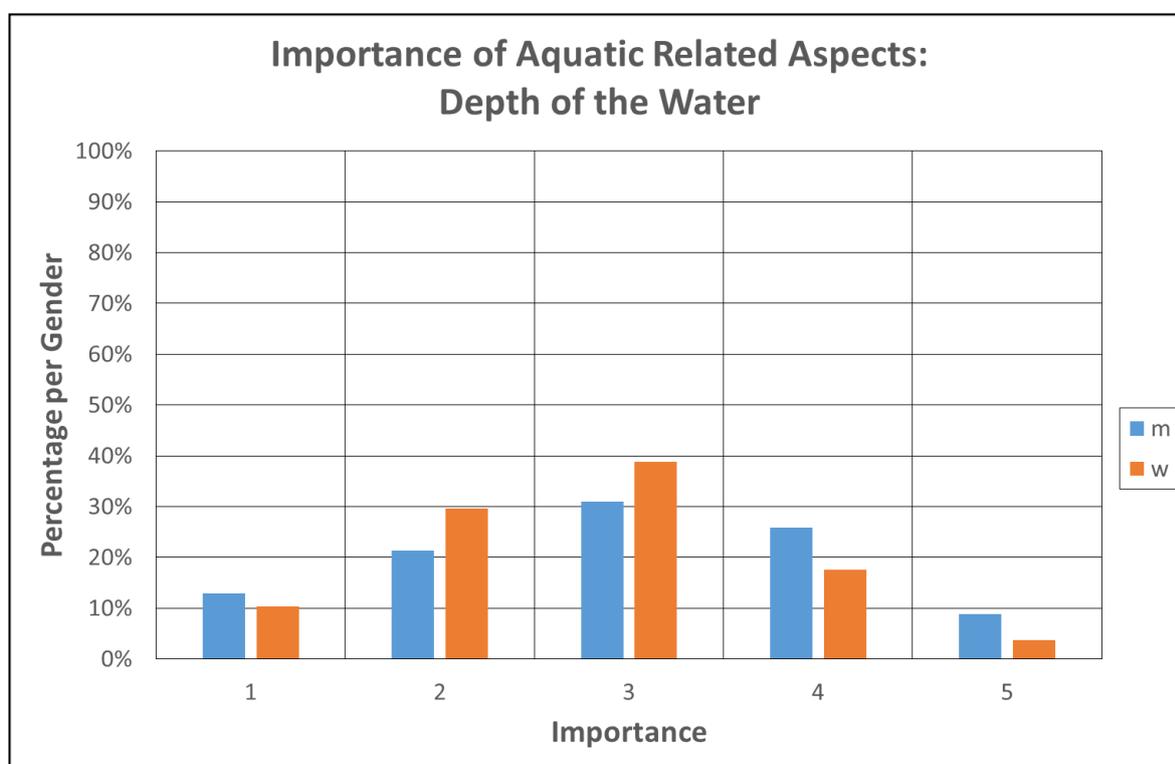
Waters-related: underwater activities			
	Gender		
Importance	m	f	Mean value
1	38%	31%	36%
2	28%	33%	29%
3	16%	25%	19%
4	11%	7%	10%
5	7%	4%	6%
Mean value	100%	100%	100%



- For 66% of men and 64% of women are underwater activities not important when selecting a diving site.

13.4 Water-related: Water Depths

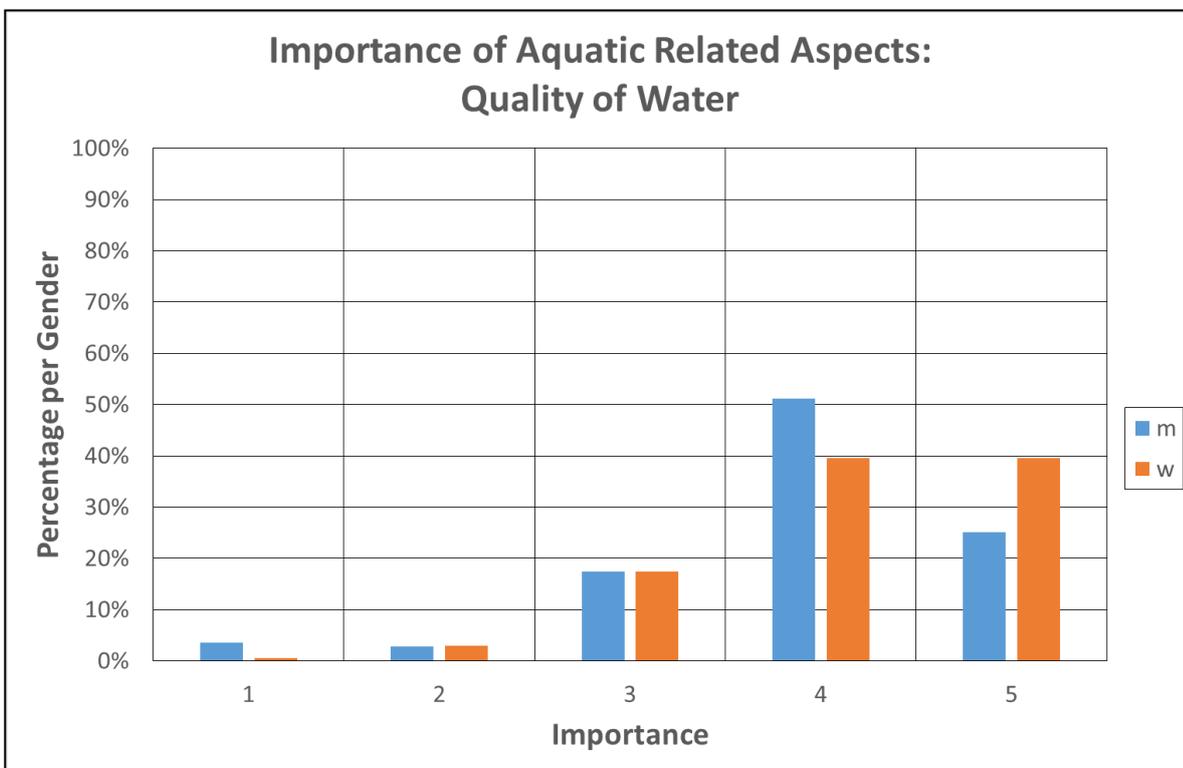
Waters-related: Water Depths			
	Gender		
Importance	m	f	Mean value
1	13%	10%	12%
2	21%	30%	24%
3	31%	39%	33%
4	26%	18%	24%
5	9%	4%	7%
Mean value	100%	100%	100%



- The depth of water is for 35% of men and 22% of women important or very important when selecting a diving site.
- The depth of water is for 52% of men and 69% of women a "nice to have" or "not important".

13.5 Water-related: Water Quality

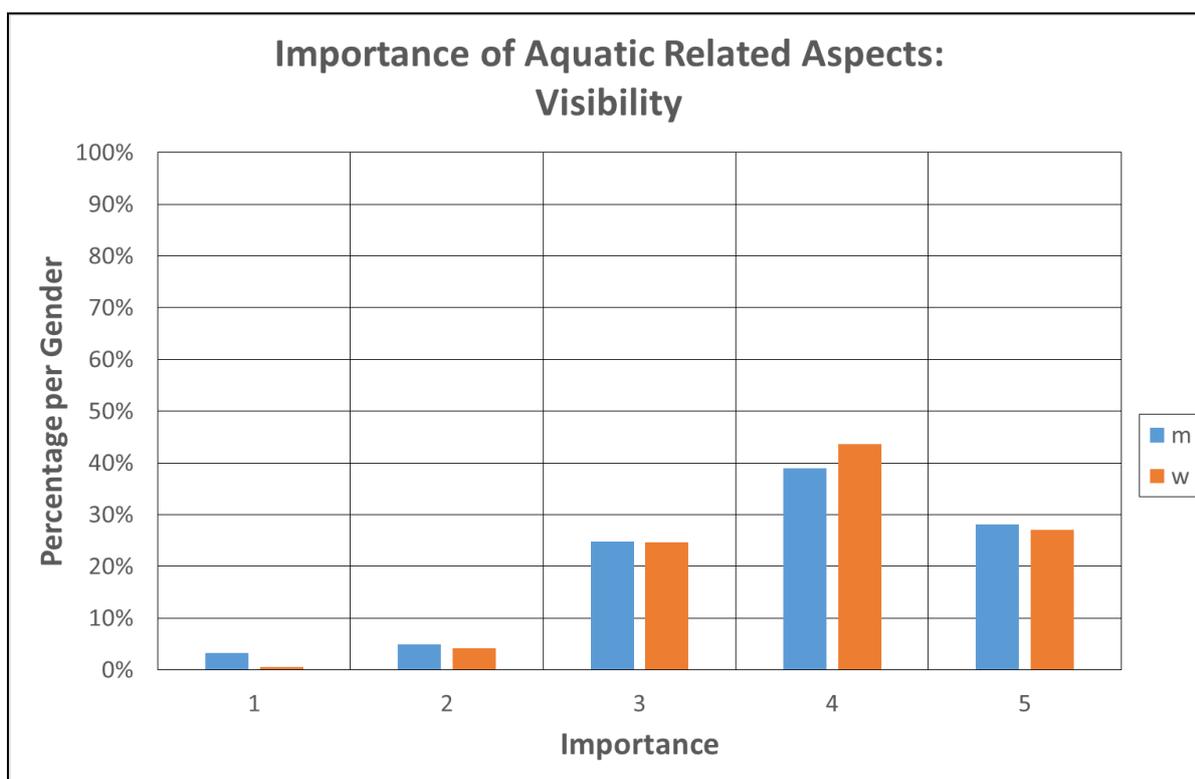
Waters-related: Water Quality			
Importance	Gender		Mean value
	m	f	
1	4%	1%	3%
2	3%	3%	3%
3	17%	17%	17%
4	51%	40%	48%
5	25%	39%	29%
Mean value	100%	100%	100%



- The water quality is for 76% of men and 79% of women “important” or “very important” when choosing a diving site.

13.6 Water-related: Visibilities

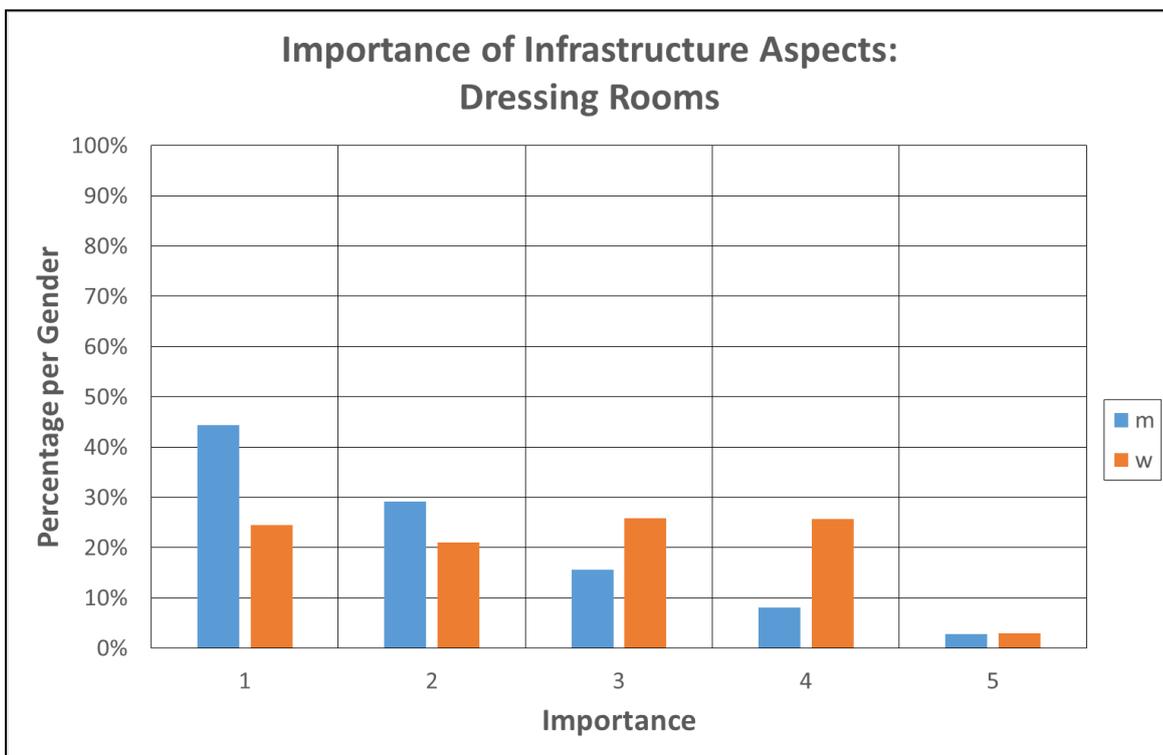
Waters-related: visibilities			
	Gender		
Importance	m	f	Mean value
1	3%	1%	3%
2	5%	4%	5%
3	25%	25%	25%
4	39%	44%	40%
5	28%	27%	28%
Mean value	100%	100%	100%



- The visibility is for 67% of men and 71% of women “important” or “very important” when selecting a diving site.

13.7 Infrastructure: Changing Rooms

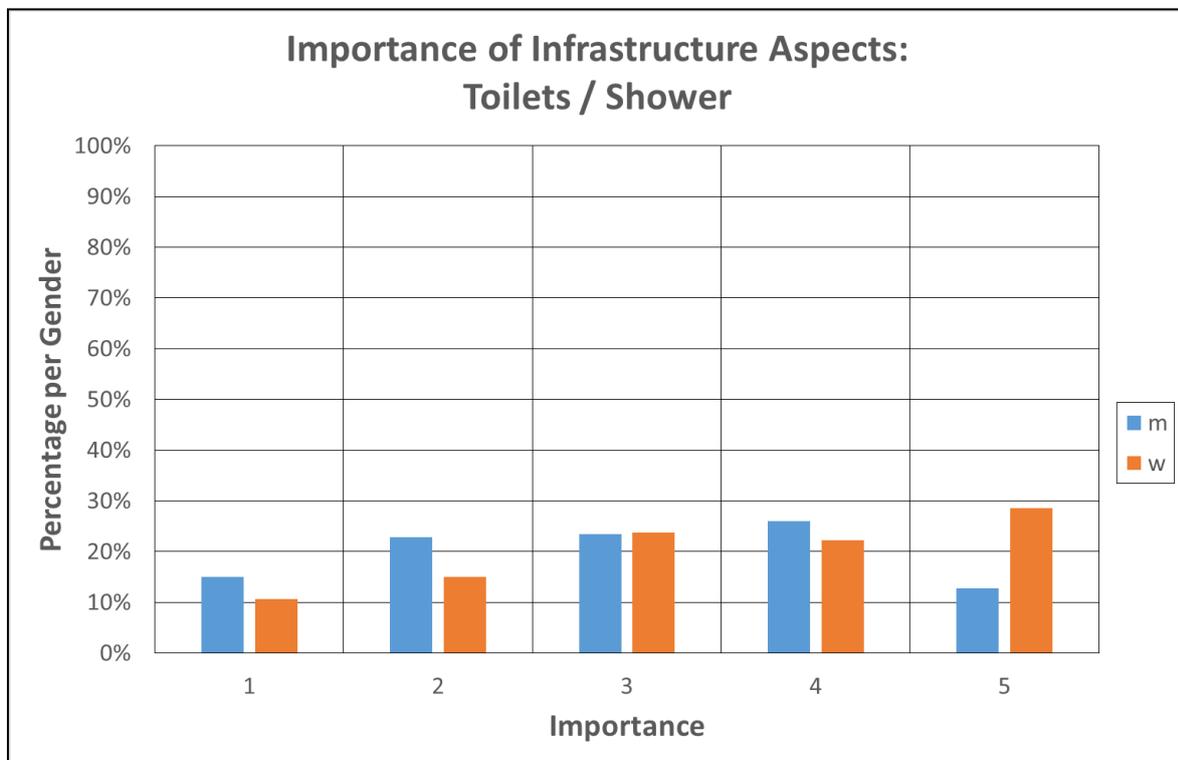
Infrastructure: changing rooms			
	Gender		
Importance	m	f	Mean value
1	44%	25%	39%
2	29%	21%	27%
3	16%	26%	18%
4	8%	26%	13%
5	3%	3%	3%
Mean value	100%	100%	100%



- Changing rooms are more a need for women.
- For 73% of men and 46% of women are changing rooms “irrelevant” or “not important” when choosing a diving site.
- However, for 52% of women it is “important” or a "nice to have".

13.8 Infrastructure: Toilets/Shower

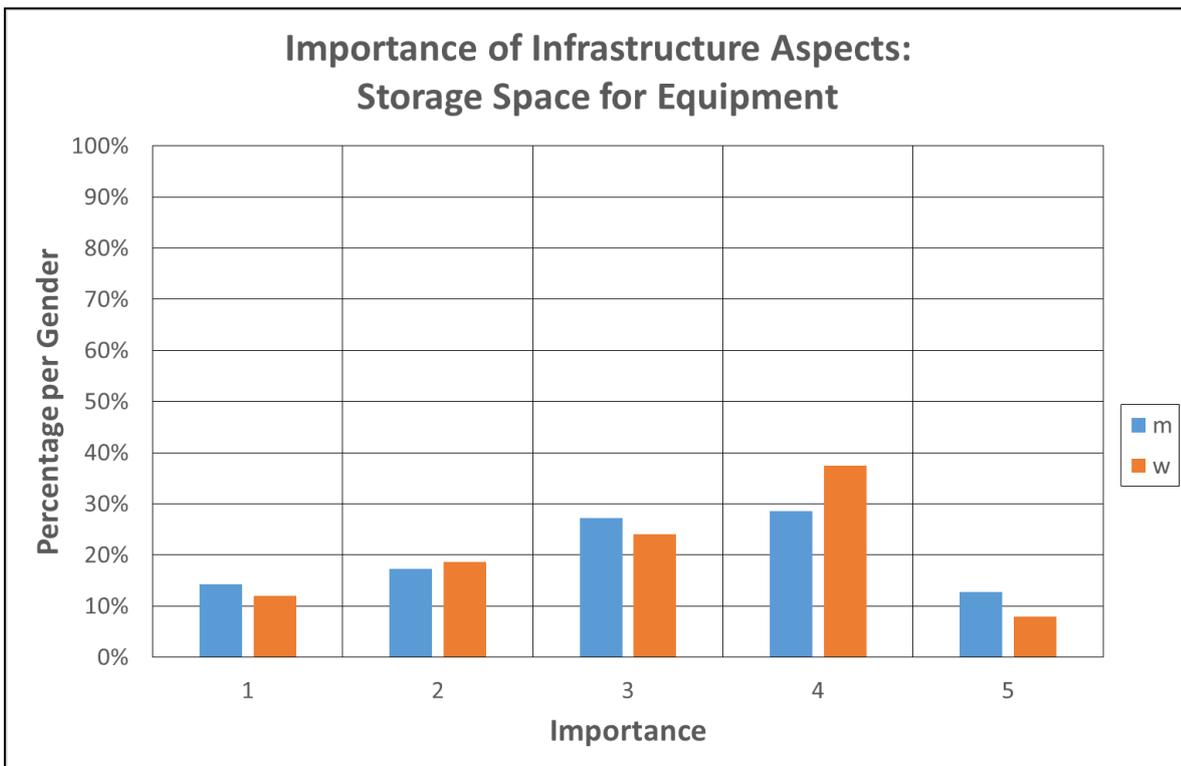
Infrastructure: toilets/shower			
	Gender		
Importance	m	f	Mean value
1	15%	11%	14%
2	23%	15%	21%
3	23%	24%	23%
4	26%	22%	25%
5	13%	29%	17%
Mean value	100%	100%	100%



- In general, divers consider toilets/showers as a "nice to have" and this aspect is more important for women.
- For 39% of men and 51% of women are toilets/showers "important" or "very important" when selecting a diving site.

13.9 Infrastructure: Resting Area

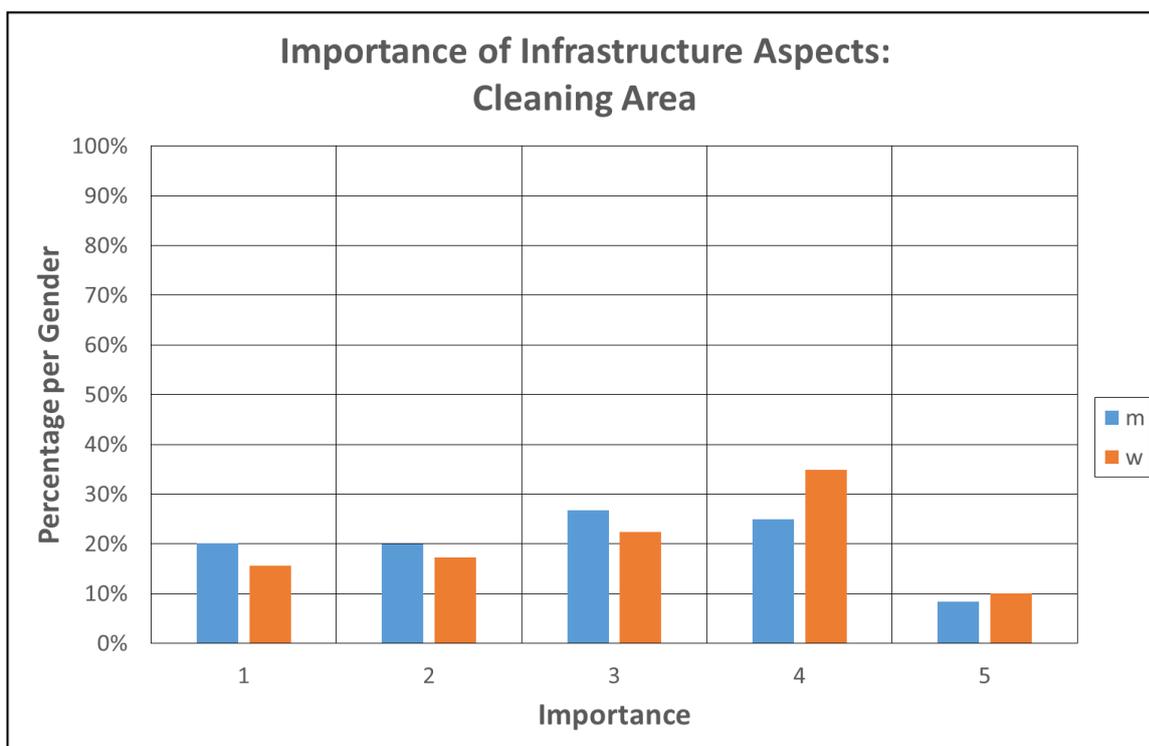
Infrastructure: resting area			
	Gender		
Importance	m	f	Mean value
1	14%	12%	14%
2	17%	19%	18%
3	27%	24%	26%
4	29%	37%	31%
5	13%	8%	11%
Mean value	100%	100%	100%



- A resting area for equipment is not a very important requirement.
- However, for 56% of men and 61% of women are resting areas “important” or a “nice to have”.

13.10 Infrastructure: Cleaning Area

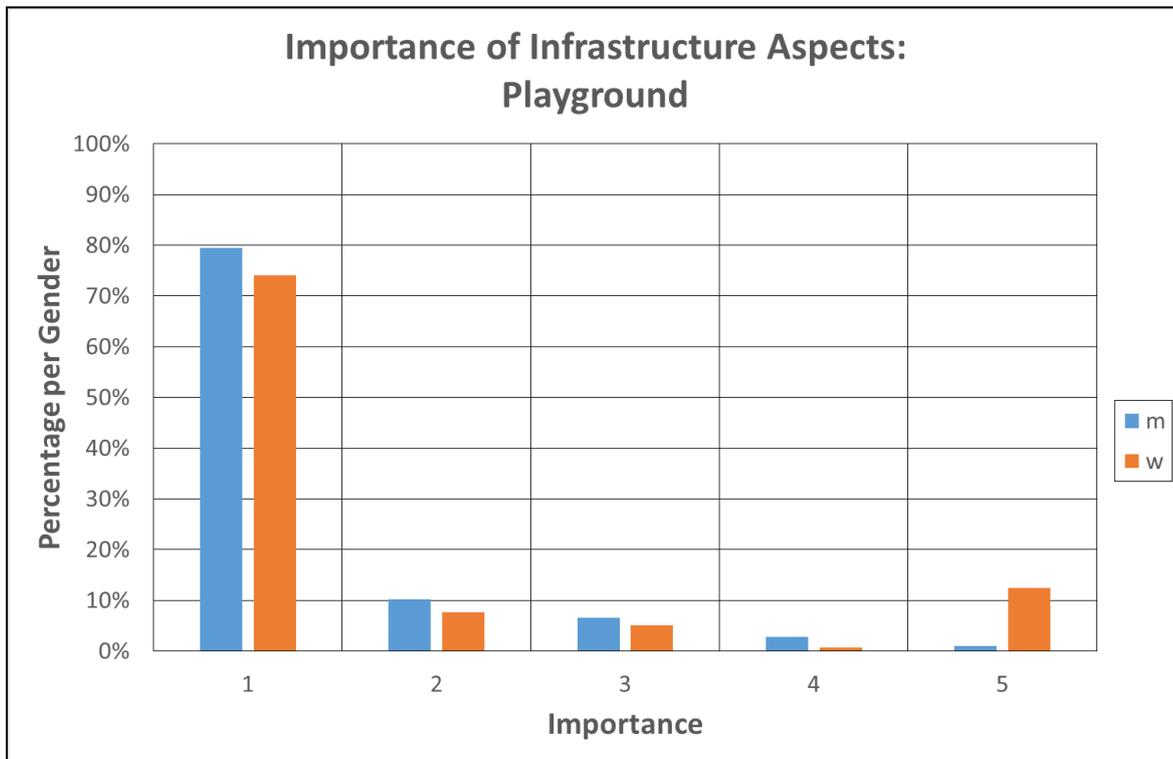
Infrastructure: cleaning area			
	Gender		
Importance	m	f	Mean value
1	20%	16%	19%
2	20%	17%	19%
3	27%	22%	25%
4	25%	35%	28%
5	8%	10%	9%
Mean value	100%	100%	100%



- A cleaning area does not belong to the very important requirements.
- However, for 52% of men and 57% of women a cleaning area is important or a “nice to have” when selecting a diving site.

13.11 Infrastructure: Playground

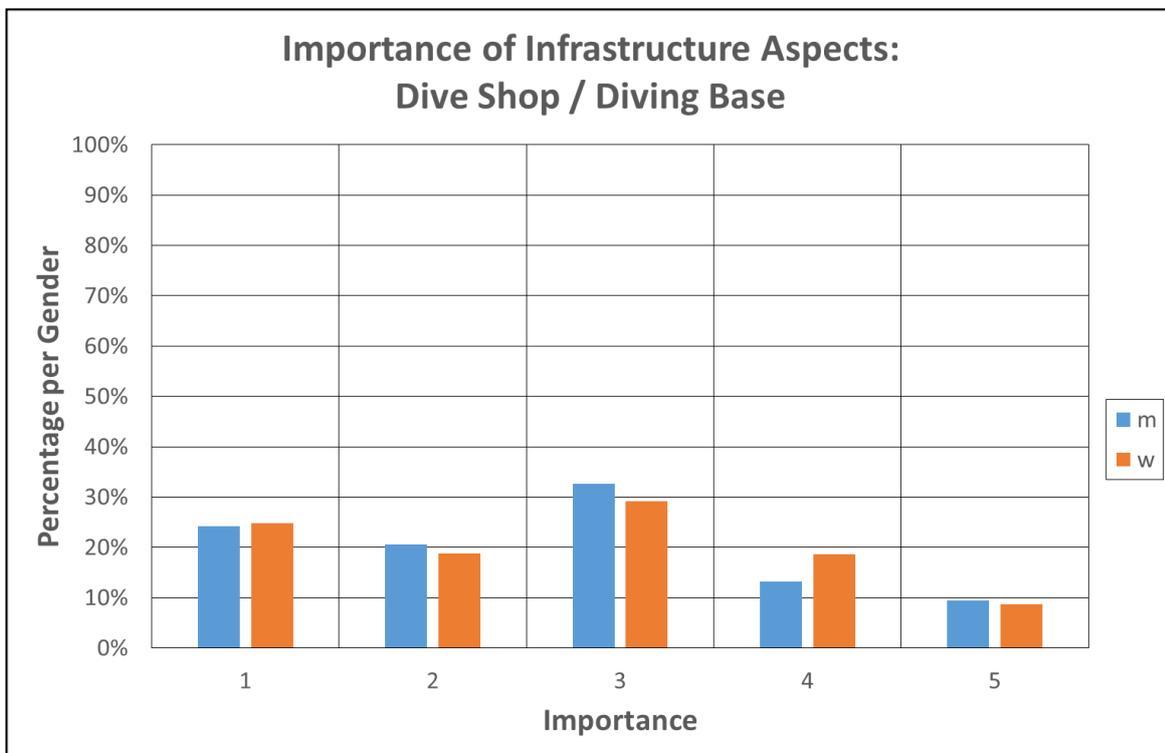
Infrastructure: playground			
	Gender		
Importance	m	f	Mean value
1	79%	74%	78%
2	10%	8%	9%
3	7%	5%	6%
4	3%	1%	2%
5	1%	12%	4%
Mean value	100%	100%	100%



- Playgrounds are considered “irrelevant” by 89% of men and by 82% of women.
- However, for 12% of female divers (with children) a nice playground is an important aspect when selecting a diving site.

13.12 Infrastructure: Diving Shop / Dive Center

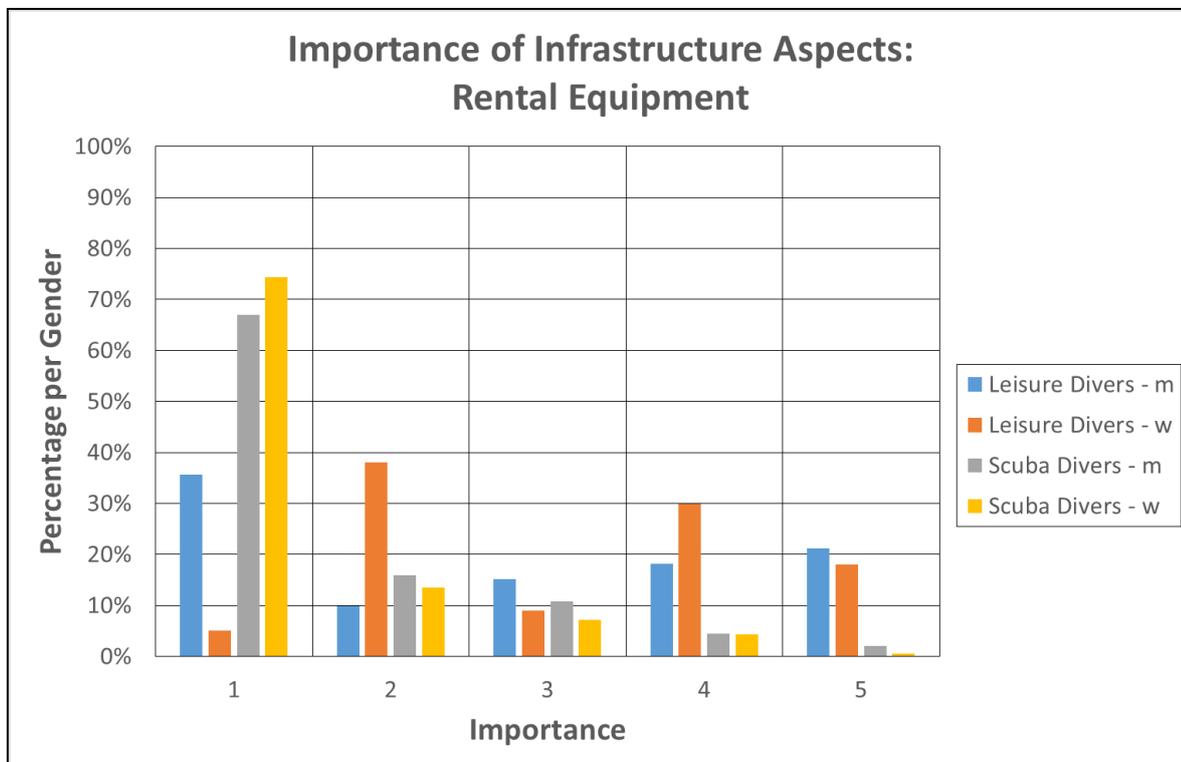
Infrastructure: diving shop/ dive center			
	Gender		
Importance	m	f	Mean value
1	24%	25%	24%
2	21%	19%	20%
3	33%	29%	32%
4	13%	19%	15%
5	9%	9%	9%
Mean value	100%	100%	100%



- Diving shops / dive center are considered as "nice to have" when selecting a dive site.
- For 45% of men and 44% of women it is "irrelevant" or "not important".

13.13 Infrastructure: Rental Equipment

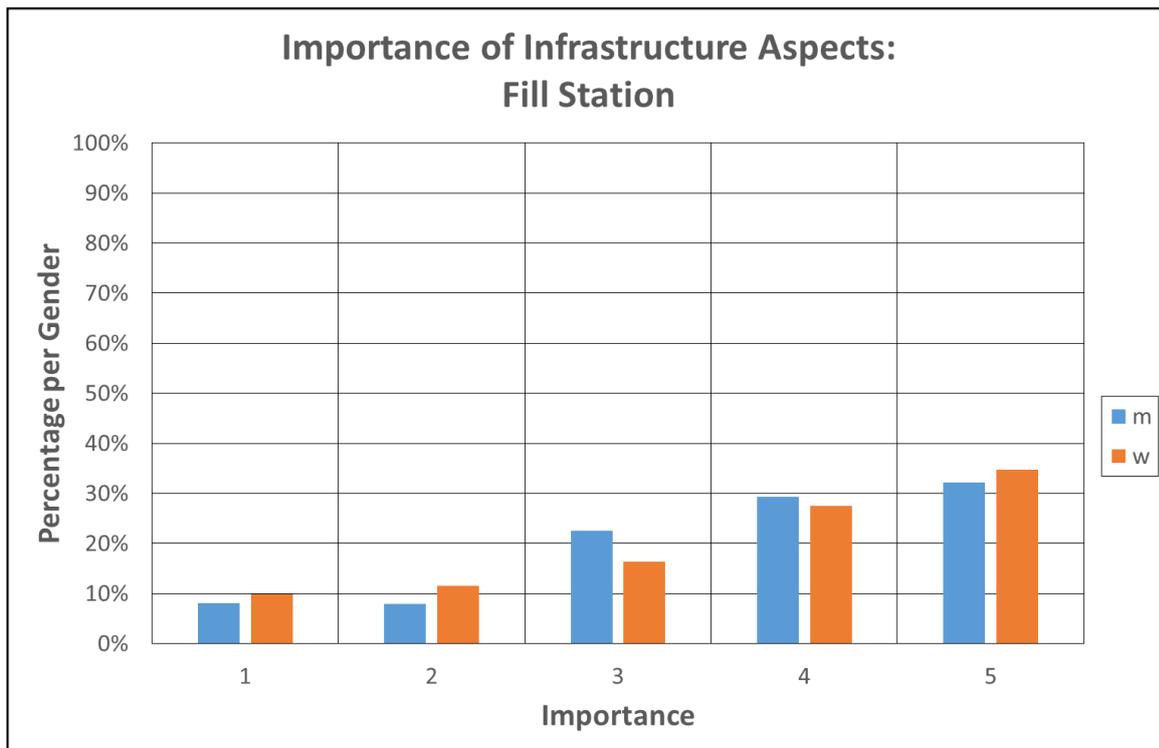
Infrastructure: Rental Equipment							
	Leisure Divers			Scuba Divers			Mean value
Importance	m	w	Mean value	m	w	Mean value	
1	36%	5%	26%	67%	74%	69%	44%
2	10%	38%	19%	16%	14%	15%	17%
3	15%	9%	13%	11%	7%	10%	12%
4	18%	30%	22%	4%	4%	4%	14%
5	21%	18%	20%	2%	1%	2%	12%
Mean value	100%	100%	100%	100%	100%	100%	100%



- Naturally rental equipment is usually offered to Leisure Divers without own diving equipment.
- For 39% of male and 48% of female Leisure Divers is the availability of rental equipment an “important” to “very important” aspect when choosing a diving site.

13.14 Infrastructure: Filling Station

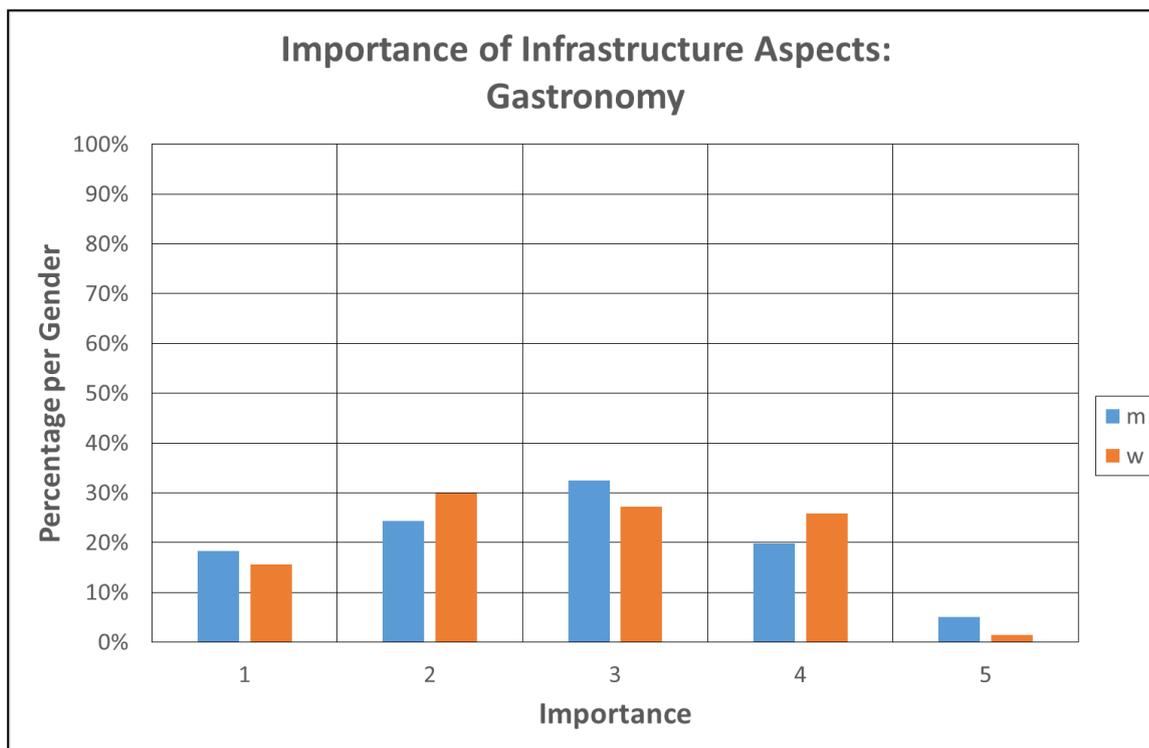
Infrastructure: Filling station			
	Gender		
Importance	m	f	Mean value
1	8%	10%	9%
2	8%	11%	9%
3	23%	16%	21%
4	29%	28%	29%
5	32%	35%	33%
Mean value	100%	100%	100%



- Filling stations are an “important” to “very important” aspect for 61% of men and 63% of women when selecting a diving site.

13.15 Infrastructure: Gastronomy

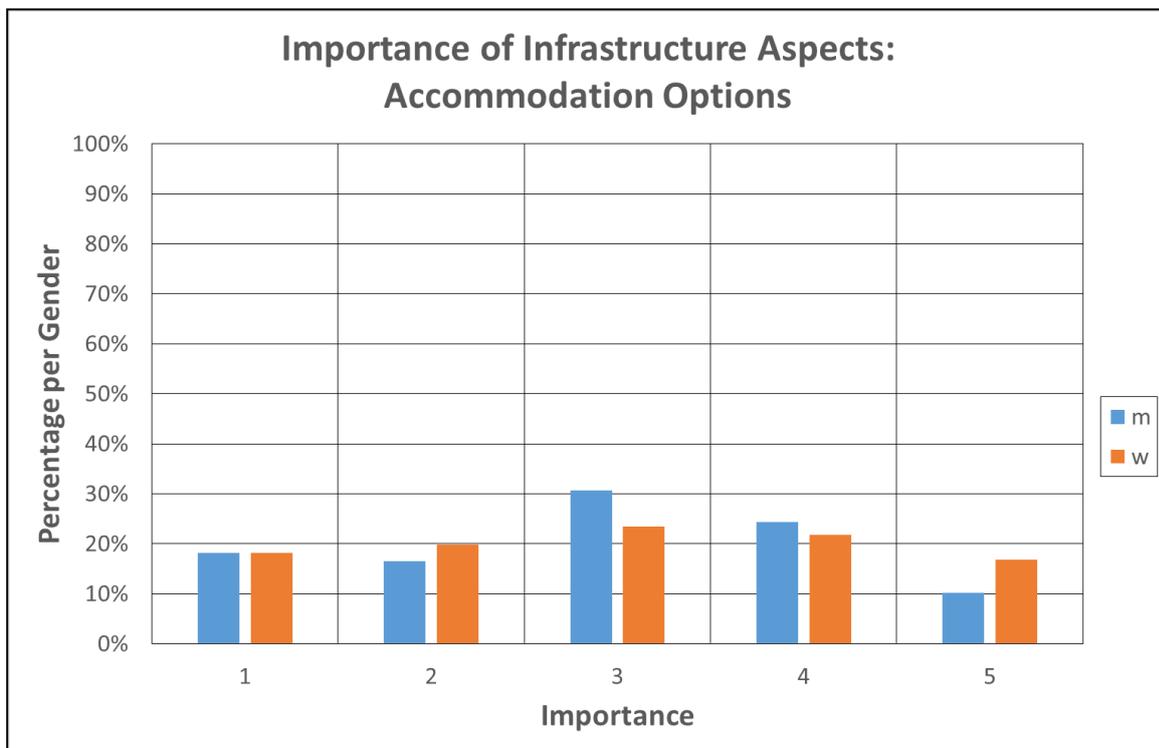
Infrastructure: Gastronomy			
	Gender		
Importance	m	f	Mean value
1	18%	16%	18%
2	24%	30%	26%
3	32%	27%	31%
4	20%	26%	21%
5	5%	1%	4%
Mean value	100%	100%	100%



- Gastronomy at the diving site is for divers typically a "nice to have" aspect.
- Anyhow, 25% of the divers think that it is "important" or "very important".

13.16 Infrastructure: Accommodation

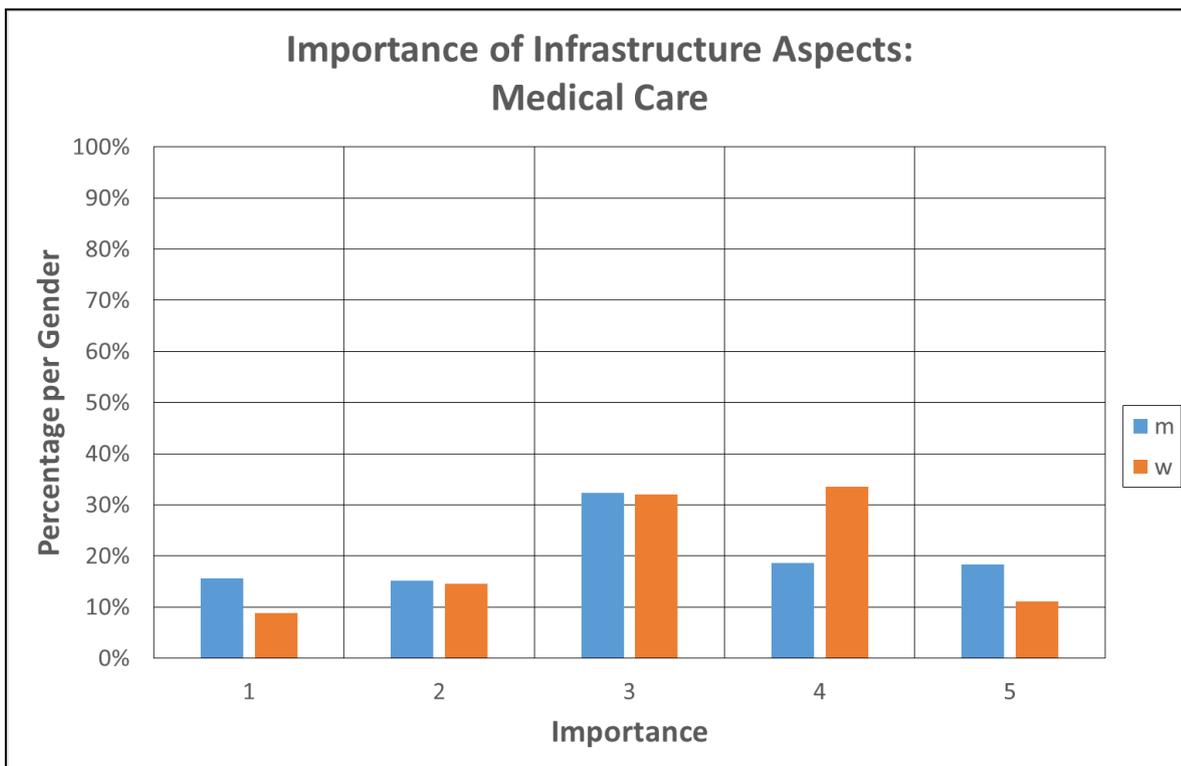
Infrastructure: Accommodation			
	Gender		
Importance	m	f	Mean value
1	18%	18%	18%
2	17%	20%	17%
3	31%	23%	29%
4	24%	22%	24%
5	10%	17%	12%
Mean value	100%	100%	100%



- The interest in accommodation at the diving site depends very likely on the location and accessibility of the diving site as well as on the question if a one-day or a several-day diving excursion is intended.
- Anyhow, for 36% of divers it is “important” to “very important”.

13.17 Infrastructure: Medical Care

Infrastructure: Medical care			
Importance	Gender		Mean value
	m	f	
1	16%	9%	14%
2	15%	15%	15%
3	32%	32%	32%
4	19%	33%	23%
5	18%	11%	16%
Mean value	100%	100%	100%



- Especially women are interested in a qualified medical care at the diving site.
- 37% of men and 44% of women consider it “important” to “very important”.
- For 31% of men and 24% of women medical care at the diving site is “irrelevant”.

14 Factors of Attractiveness

Questions referred to „Which factors would make diving more attractive to you? “

Given were six factors according to importance, the aspects should be marked at a scale from 1 to 5:

irrelevant	(not important)	(nice to have)	(important)	very important
1	2	3	4	5

The following evaluations show by factor the distribution of importance per gender and type of divers.

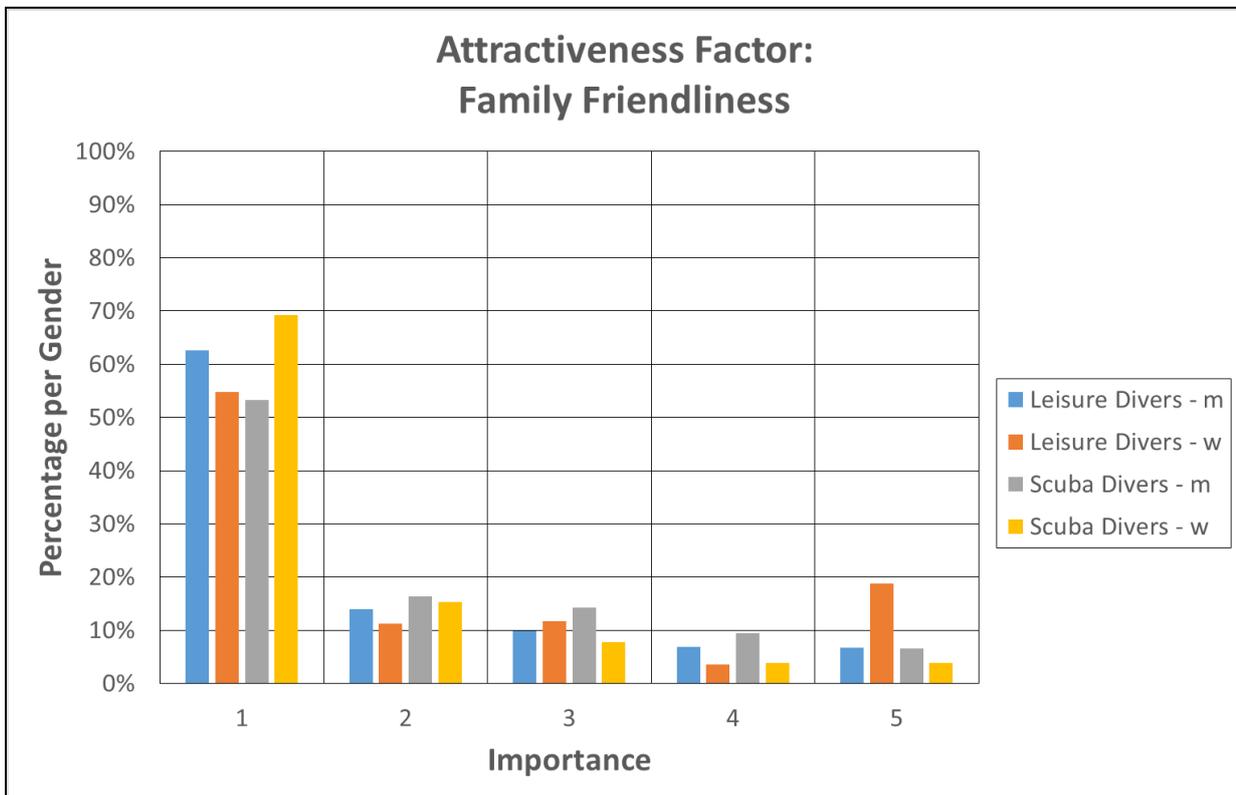
Additionally to the given factors, the respondents could state individually other important factors.

Result: about 500 additional hints that cannot be evaluated here.

If a respective analysis should be required, please provide feedback to contact data mentioned in the last chapter.

14.1 Factor of Attractiveness: Family-friendly

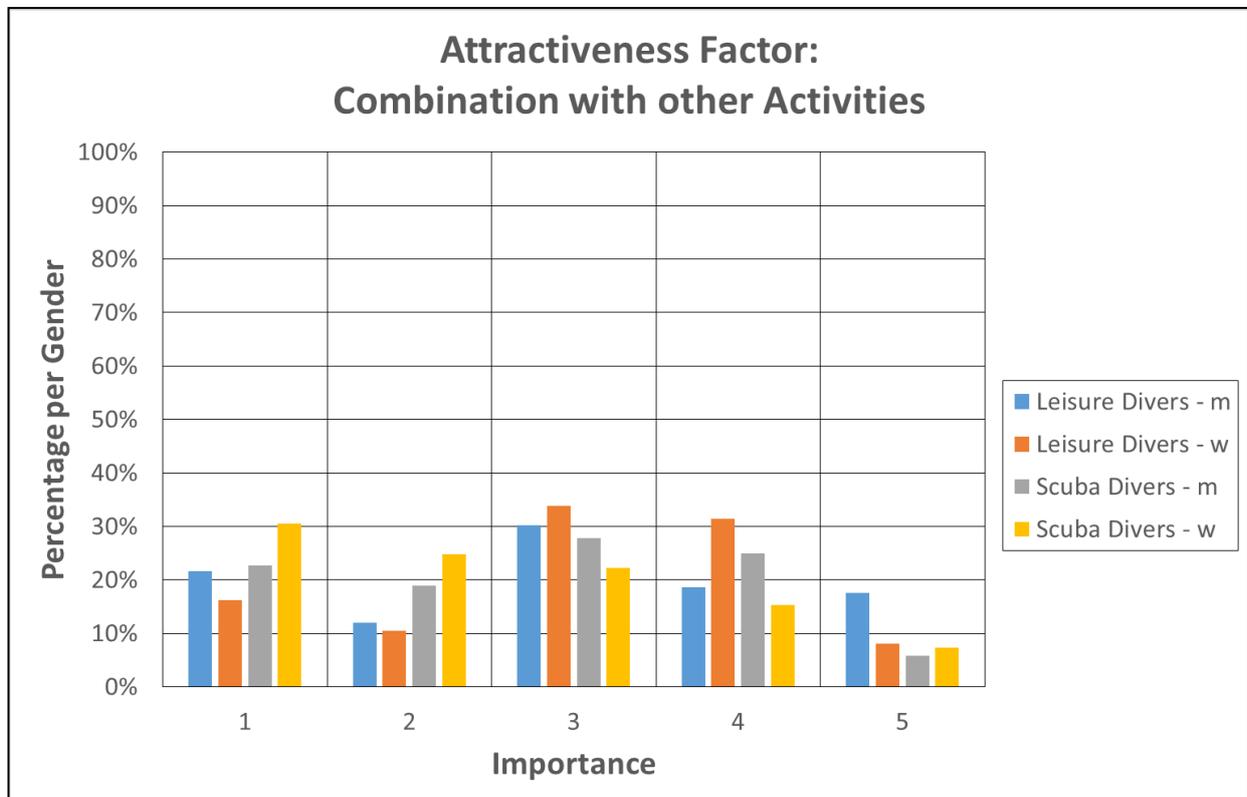
Factor of Attractiveness: family-friendly							
	Leisure Divers			Scuba Divers			Mean value
Importance	m	f	Mean value	m	f	Mean value	
1	63%	55%	60%	53%	69%	57%	59%
2	14%	11%	13%	16%	15%	16%	14%
3	10%	12%	10%	14%	8%	13%	12%
4	7%	4%	6%	9%	4%	8%	7%
5	7%	19%	11%	7%	4%	6%	9%
Mean value	100%	100%	100%	100%	100%	100%	100%



- Family-friendliness (playgrounds, childcare etc.) is for most of the divers no topic.
- Exception, for about 20% of female Leisure Divers (with children) this would be a very important attractively factor.

14.2 Factor of Attractiveness: Diving in combination with other activities

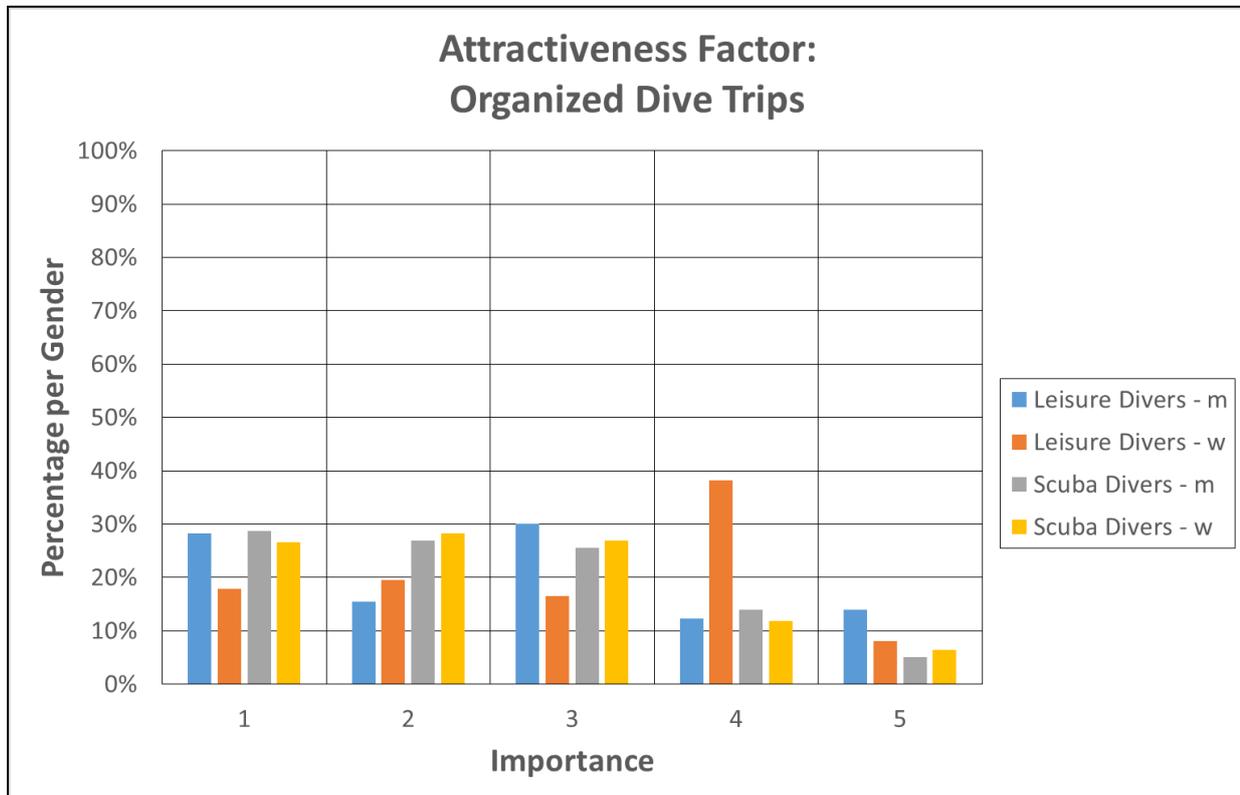
Factor of Attractiveness: diving in combination with other activities							
	Leisure Divers			Scuba Divers			Mean value
Importance	m	f	Mean value	m	f	Mean value	
1	22%	16%	20%	23%	30%	24%	22%
2	12%	11%	11%	19%	25%	20%	15%
3	30%	34%	31%	28%	22%	27%	29%
4	19%	31%	23%	25%	15%	23%	23%
5	18%	8%	14%	6%	7%	6%	11%
Mean value	100%	100%	100%	100%	100%	100%	100%



- The combination of diving with additional activities would be an important factor of attractiveness for about 37% of Leisure Divers (especially for female Leisure Divers) but only for 29% of the Scuba Divers.

14.3 Factor of Attractiveness: Organized Diving Trips

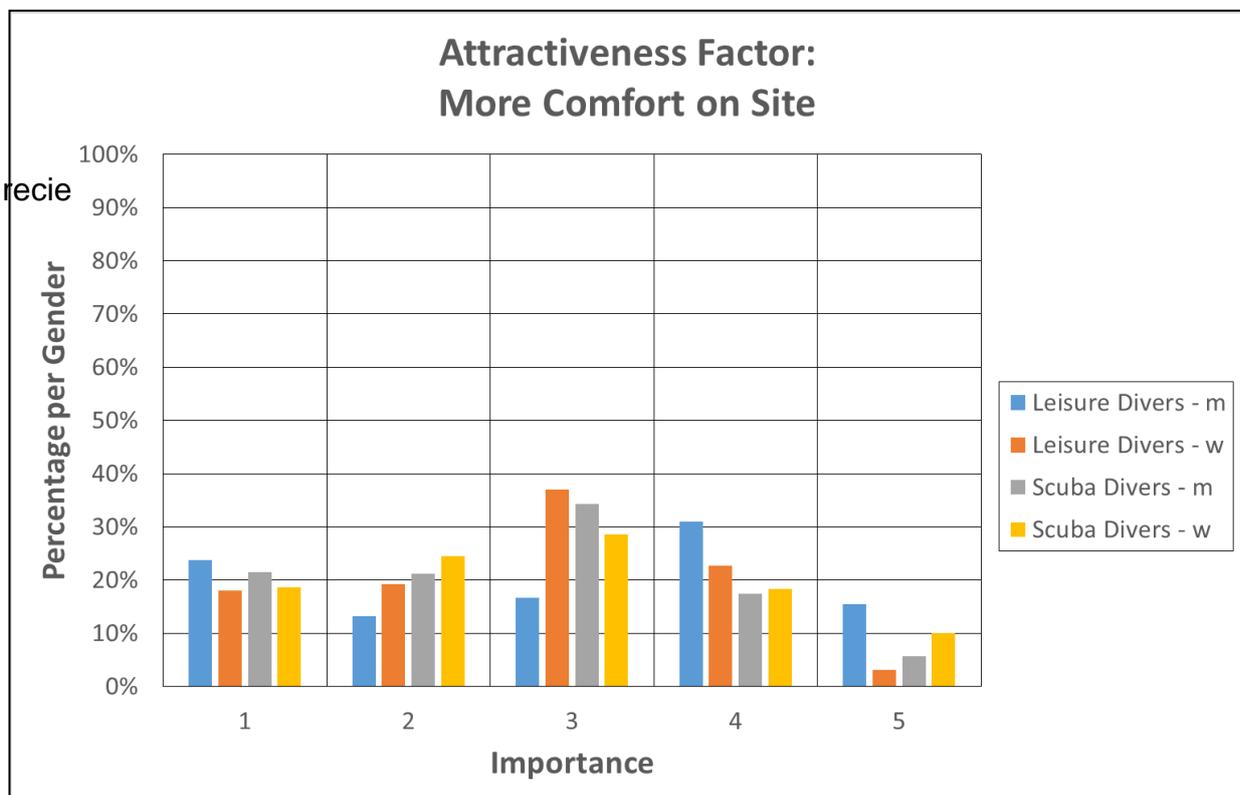
Factor of Attractiveness: organized diving trips							
	Leisure Divers			Scuba Divers			Mean value
Importance	m	f	Mean value	m	f	Mean value	
1	28%	18%	25%	29%	27%	28%	26%
2	15%	19%	17%	27%	28%	27%	21%
3	30%	16%	26%	26%	27%	26%	26%
4	12%	38%	21%	14%	12%	13%	18%
5	14%	8%	12%	5%	6%	5%	9%
Mean value	100%	100%	100%	100%	100%	100%	100%



- Organized diving trips would be an important factor of attractiveness for about 33% of the Leisure Divers (especially for female Leisure Divers) but only for 27% of the Scuba Divers.

14.4 Factor of Attractiveness: More Comfort On-site

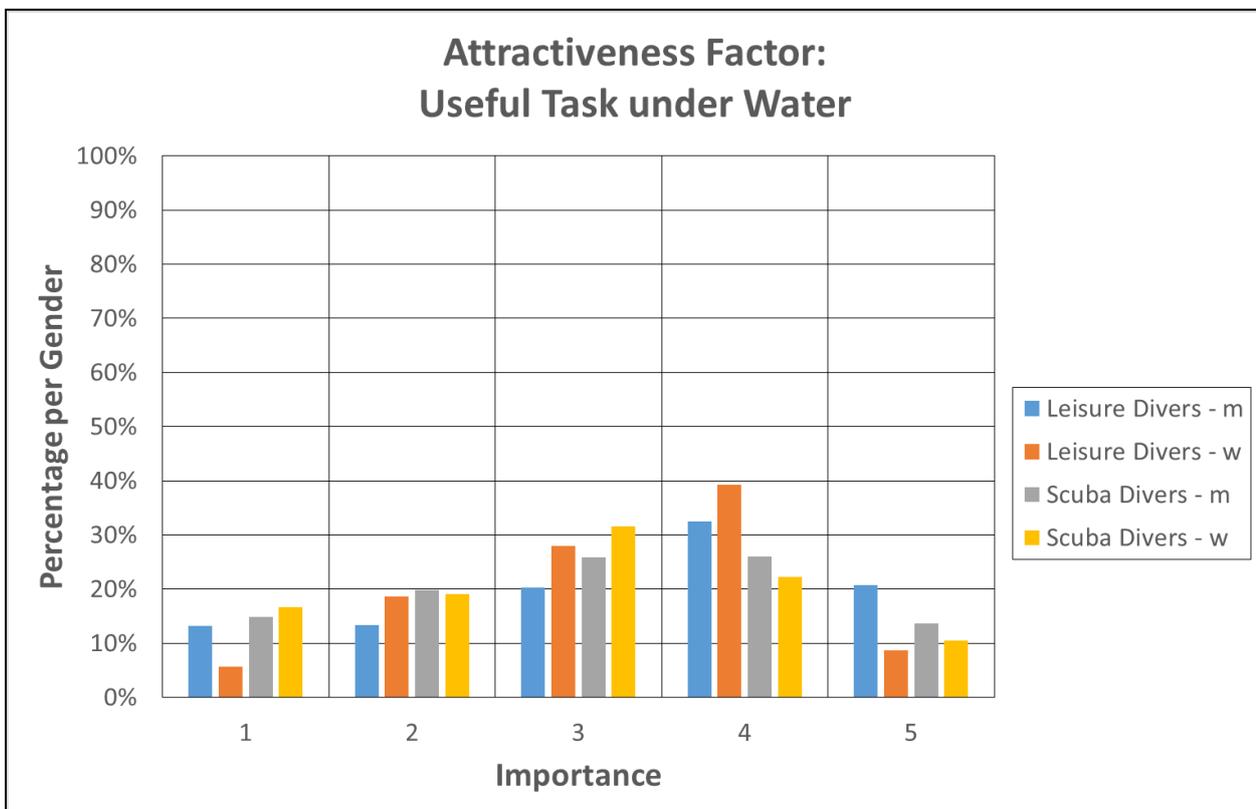
Factor of Attractiveness: more comfort on-site							
	Leisure Divers			Scuba Divers			Mean value
Importance	m	f	Mean value	m	f	Mean value	
1	24%	18%	22%	21%	19%	21%	21%
2	13%	19%	15%	21%	24%	22%	18%
3	17%	37%	23%	34%	29%	33%	27%
4	31%	23%	28%	17%	18%	18%	24%
5	16%	3%	12%	6%	10%	7%	9%
Mean value	100%	100%	100%	100%	100%	100%	100%



- More comfort on-site is a typical „nice to have“:
For about 40% of the Leisure Divers and 33% of the Scuba Divers this would be an important factor of attractiveness.
- 37% of the Leisure Divers and 39% of the Scuba Divers however do not need additional comfort.

14.5 Factor of Attractiveness: Useful Tasks

Factor of attractiveness: useful tasks							
	Leisure Divers			Scuba Divers			Mean value
Importance	m	f	Mean value	m	f	Mean value	
1	13%	6%	11%	15%	17%	15%	13%
2	13%	19%	15%	20%	19%	20%	17%
3	20%	28%	23%	26%	31%	27%	25%
4	32%	39%	35%	26%	22%	25%	31%
5	21%	9%	17%	14%	11%	13%	15%
Mean value	100%	100%	100%	100%	100%	100%	100%



- Obviously, for many divers a useful task underwater (e.g. assistance at aid corporations, scientific tasks, etc.) would be a fascinating challenge, such an offer would be for about 52% of the Leisure Divers and 46% of the Scuba Divers an important factor of attractiveness.
- The diving providers should review if a cooperation with an appropriate aid corporations, and/or e.g. scientific entities with according demand may create a win-win situation.

15 Financial Input for Diving

We asked respondents about their financial input for diving.

For the costs referred, we created a frequency distribution of related divers, according to type.

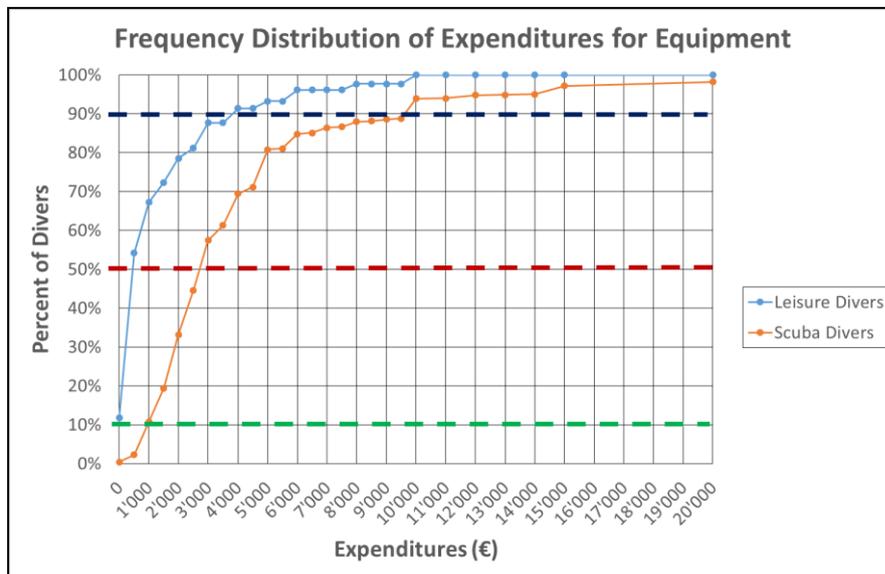
The frequency distribution show the following:

- 10% Lower limit:
10% of divers invest less than this limit
90% invest more
- 50% Mean value:
50% of divers spend less
50% of divers invest more
- 90% Upper limit:
90% of the divers invest less than this limit
10% invest more

15.1 Value of Current Equipment

The question regarding the cost of equipment was, "How much did you spent for your current equipment?"

Frequency distribution for Leisure Divers and Scuba Divers:



The following key figures arose for expenditures of the current equipment

- Leisure Divers:
 - Lower limit (10%): approx. <500 €
 - Mean value (50%) approx. 500 €
 - Upper limit (90%): approx. 4'000 €

- Scuba Divers:
 Lower limit (10%): approx. 1'000 €
 Mean value (50%): approx. 2'800 €
 Upper limit (90%): approx. 10'000 €

For comparison please see the results of the survey in 2009:

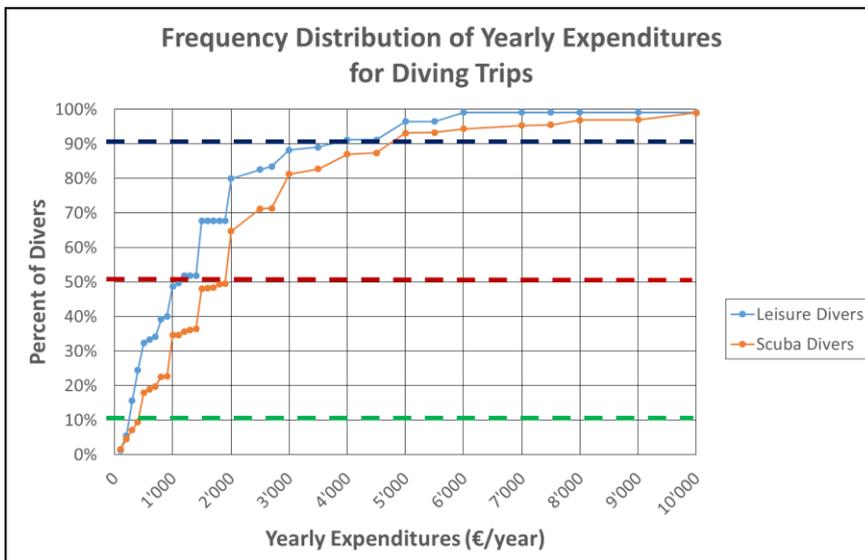
- Leisure Divers mean value approx. 230 €
- Scuba Divers: mean value approx. 2'900 €

Read: The average cost of equipment changed significantly.

15.2 Expenditure per Year for Diving Trips

The question was, "How much do you invest for diving trips (incl. journey to destination, accommodation, diving etc.) on average per year?"

Frequency distribution for Leisure Divers and Scuba Divers:



The following key figures arose from yearly expenditures for diving trips:

- Leisure Divers:
 Lower limit (10%): approx. 300 €/year
 Mean value (50%): approx. 1'100 €/year
 Upper limit (90%): approx. 4'000 €/year
- Scuba Divers:
 Lower limit (10%): approx. 500 €/year
 Mean value (50%): approx. 1'900 €/year
 Upper value (90%): approx. 5'000 €/year

In comparison the results of the survey in 2009:

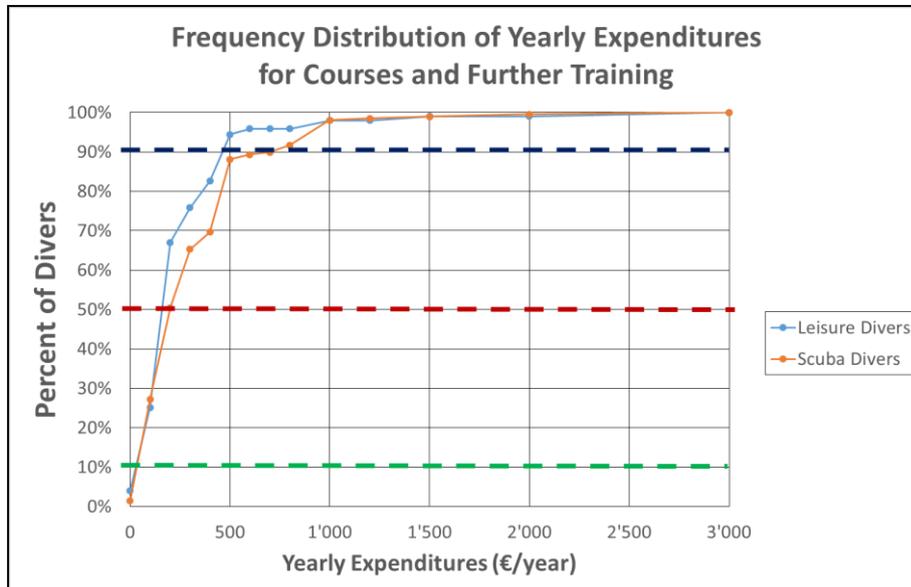
- Leisure Divers mean value approx. 200 €
- Scuba Divers: mean value approx. 1'400 €

Read: The yearly expenditures for diving trips increased since 2009.

15.3 Yearly Expenditures for Training and Seminars

The question was, "How much do you spend for training and seminars yearly?"

Frequency distribution for Leisure Divers and Scuba Divers:



The following key figures show the yearly expenditures for training and seminars

- Leisure Divers:

Lower limit (10%):	approx.	0 €/year
Mean value (50%)	approx.	200 €/year
Upper limit (90%):	approx.	400 €/year
- Scuba Divers:

Lower limit (10%):	approx.	500 €/year
Mean value (50%)	approx.	250 €/year
Upper limit (90%):	approx.	600 €/year

In comparison the results of the survey in 2009:

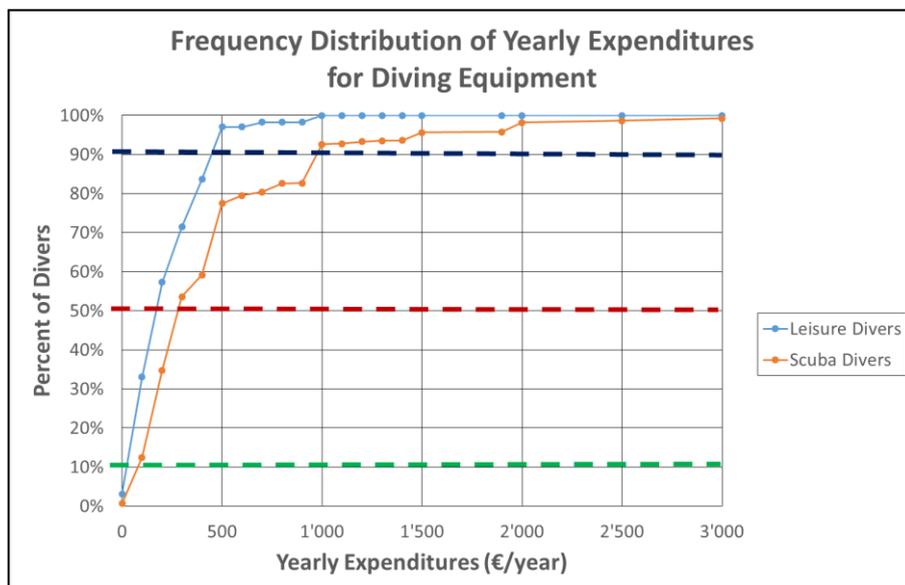
- Leisure Divers mean value approx. 100 €
- Scuba Divers: mean value approx. 200 €

Read: The yearly expenditures for training and seminars have increased slightly since 2009.

15.4 Yearly Expenditures for Diving Equipment

The question was, "How much do you invest for diving equipment on average per year?"

Frequency distribution for Leisure Divers and Scuba Divers:



The following key figures arose from yearly expenditures for diving equipment:

- Leisure Divers:

Lower limit (10%):	approx.	0 €/year
Mean value (50%)	approx.	200 €/year
Upper limit (90%):	approx.	400 €/year
- Scuba Divers:

Lower limit (10%):	approx.	100 €/year
Mean value (50%)	approx.	300 €/year
Upper limit (90%):	approx.	900 €/year

In comparison the results of the survey in 2009:

- Leisure Divers mean value approx. 100 €
- Scuba Divers: mean value approx. 300 €

Read: The yearly expenditures for diving equipment did not have changed since 2009.

15.5 Extrapolation: Estimated Market Volume

At the following extrapolation, please note that:

- "Expenditures per diver" are, as a rule, the above-mentioned "averaged" values (50%).
- The extrapolation for Leisure Divers bases on a relatively low number of cases and therefore should be considered as an estimated trend.
- Regarding sales in diving equipment and training of Leisure Divers it is recognized that a large part is only "visible" to the specialist dealers during a few years after their initial training. Estimated is that from the total number of Leisure Divers approx. 50 % stay active long-termed and effect sales on a regular basis. Except for the extrapolation of diving trips where the total number of Leisure Divers is included.
- The data do not show if and to what extend
 - a) The sales result from specialized dealers or other suppliers
 - b) The sales are made in Germany or abroad (e.g. at holiday destination)
- The following tables show the determined values in total compared to the survey in 2009.

15.4.1 Diving Equipment

Diving			
	Leisure Divers	Scuba Divers	Total
Number	230'000	177'000	407'000
Number of actives (50%)	115'000		
Newcomers per year	30'000	10'000	40'000
One-time expenditures when starting/diver (€)	500	2'800	
Current spending per year/diver (€)	200	300	
Volume when starting/year (€)	15'000'000	28'000'000	43'000'000
Current volume per year (€)	23'000'000	53'100'000	76'100'000
Total / Year (€)	38'000'000	81'100'000	119'100'000
Total / Year 2009 (€)	16'790'000	93'200'000	109'990'000

15.4.2 Training and Seminars

Training and Seminars			
	Leisure Divers	Scuba Divers	Total
Number	230'000	177'000	407'000
Number of actives (50%)	115'000		
Average expenditures per year / divers (€)	200	250	
Volume per year (€)	23'000'000	44'250'000	67'250'000
Volume per year 2009 (€)	10'350'000	32'300'000	42'650'000

15.4.3 Diving Trips

Diving Trips			
	Leisure Divers	Scuba Divers	Total
Number	230'000	177'000	407'000
Average expenditures per year/diver (€)	1'100	1'900	
Volume per year (€)	253'000'000	336'300'000	589'300'000
Volume per year 2009 (€)	46'000'000	266'000'000	312'000'000

Summary:

- According to the data of 2014 the estimated market volumes are significantly higher than 2009:
 - **Diving equipment:** about 120 Mio. €/year, +8%
Leisure Divers invested significantly more for their equipment in 2014.
 - **Training and seminars:** about 67 Mio. €/year, +58%
In 2014 Leisure Divers invested for seminars twice as much per year than 2009.
 - **Diving trips:** about 590 Mio. €/year, +88%
Especially Leisure Divers but also Scuba Divers invested 2014 considerably more for diving trips than in 2009.

Using the appropriate caution due to the number of cases for Leisure Divers:

- On average, the data give the impression as if Leisure Divers could be motivated considerably to show a stronger commitment to diving during the last five years. This is reflected also in a marked increase of the training level compared to 2009 (see chapter 7).

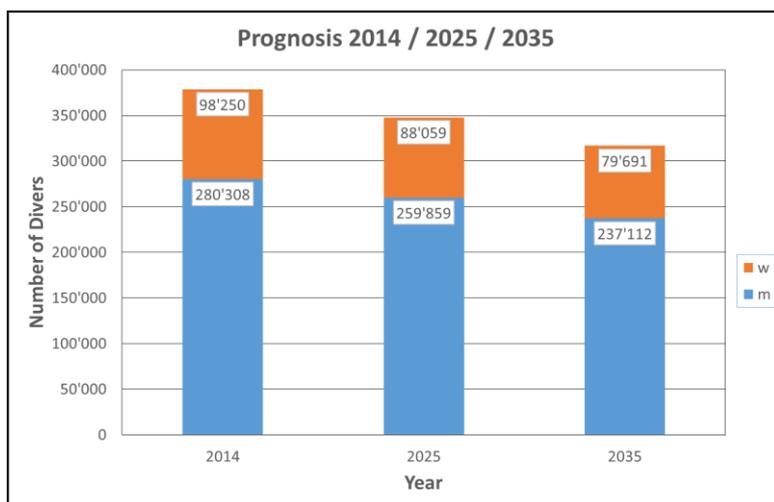
16 Prognoses

Provided that the share of male (m) and female (f) divers of the population (see chapter 4) will not change considerably, the foreseeable age distribution can be forecasted based on the demographic trend of German census bureau for the years 2015 and 2035:

Prognosis 1:

Scuba Divers + Leisure Divers, age group 15 - 75:

Age Group	Number of Divers								
	2014			2025			2035		
	m	f	m+f	m	f	m+f	m	f	m+f
15 - 20	18'922	5'676	24'598	16'260	4'873	21'133	16'038	4'806	20'844
20 - 25	11'731	13'514	25'245	9'903	11'459	21'362	9'276	10'720	19'996
25 - 30	25'695	11'205	36'900	21'780	9'553	31'334	18'930	8'297	27'227
30 - 35	23'782	5'819	29'601	21'310	5'180	26'490	18'847	4'593	23'440
35 - 40	29'345	9'305	38'650	32'265	10'086	42'351	27'177	8'560	35'736
40 - 45	43'201	16'396	59'596	41'234	15'688	56'922	37'235	14'108	51'343
45 - 50	31'392	21'151	52'543	21'863	15'140	37'004	23'583	16'060	39'642
50 - 55	35'266	3'927	39'193	24'542	2'783	27'325	24'914	2'818	27'732
55 - 60	26'737	4'404	31'142	28'986	4'718	33'703	21'139	3'512	24'651
60 - 65	16'412	6'518	22'930	21'335	8'119	29'454	14'806	5'735	20'541
65 - 70	4'890	337	5'226	6'816	460	7'276	7'270	482	7'752
70 - 75	12'934	0	12'934	13'566	0	13'566	17'898	0	17'898
Total	280'308	98'250	378'557	259'859	88'059	347'918	237'112	79'691	316'803



Age Group 15 - 75

- Due to the general demographic change (with unchanged interest in diving), the number of (active) divers will decrease

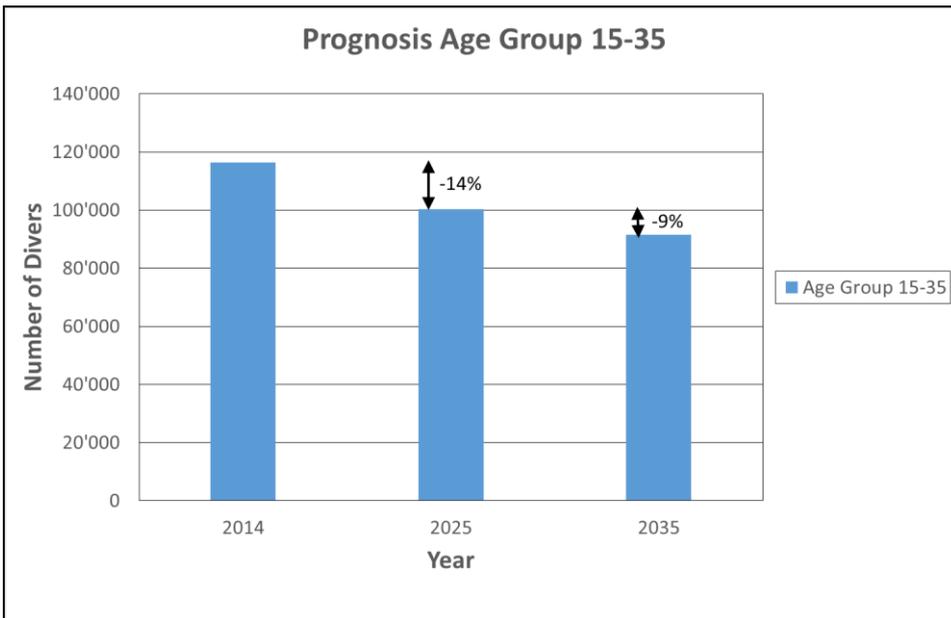
By approx. 8-9% per decade over the next twenty years.

Prognosis 2:

As already described in chapter 5 the total number of divers is deduced from the annual growth by initial training and terminations.

Status 2014, approx. 40'000 divers get initial training every year, 50% = 20'000 of them stay active medium-termed with an annual termination rate of approx. 5%.

Due to the fact (see chapter 6) that the initial trainings are limited to the group aged 15 to 35 the demographic development of this age group will be of importance for the annual growth in young divers.



- From the population forecasts ensue:
The age group 15-35- will decrease
from 2014 to 2025 by approx. -14%
from 2025 to 2035 by approx. -9%.
- That means that it is expected that the annual number of initial trainings will decline
from around 40'000 in 2014
to around 34'000 in 2025
and around 31'000 in 2035
- Assuming an annual growth of divers with an average level of activity of approx. 50% annual beginners and an annual termination of approx. 5% it will come to a forecasted stable level of active divers
2014 approx. 400'000
2025 approx. 340'000
2035 approx. 310'000

17 Summary

The survey among divers („Diving in the future“) first carried out in 2009 has been repeated with an extended questionnaire. The following analysis is based on 1'092 replies received.

As already in 2009, the questionnaires have been transferred into a representative structure by comparing with current numbers (i. a. number of instruction 2012/2013) and by means of correcting factors and then extrapolated to a real number of divers.

In the analysis there is a distinction between “Scuba Divers” with own complete diving equipment (warm water or cold water suitable) and “Leisure Divers” without own diving equipment or a partial equipment.

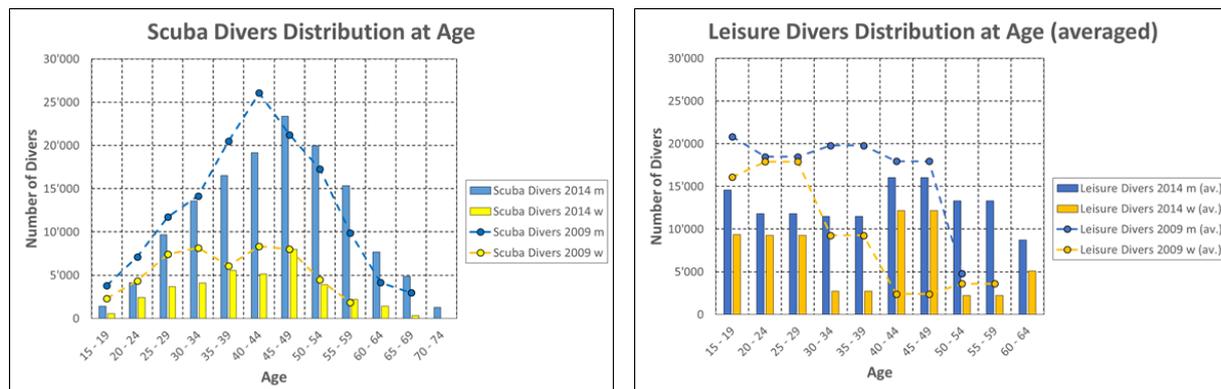
Number of active divers

The projection for 2014 results in the following numbers of active divers:

- Scuba Divers: about 177'000 (2009: 190'000)
- Leisure Divers: about 229'000 (2009: 230'000)

Total: about 406'000 (2009: 420'000)

The breakdown by sexes and age groups shows



Scuba Divers 2014:

- Men 138'000 (78%) / women 39'000 (22%)
- Changes compared to 2009 (demographic change):
 Men: number unchanged, age structure shifted by a decade:
 decrease of the younger age group < 45,
 Increase of older age group > 45.
 Women: number decreased by 23%, age structure shifted,
 Decline of younger age group < 45,
 But, as already in 2009, age-related decline of the age group > 50

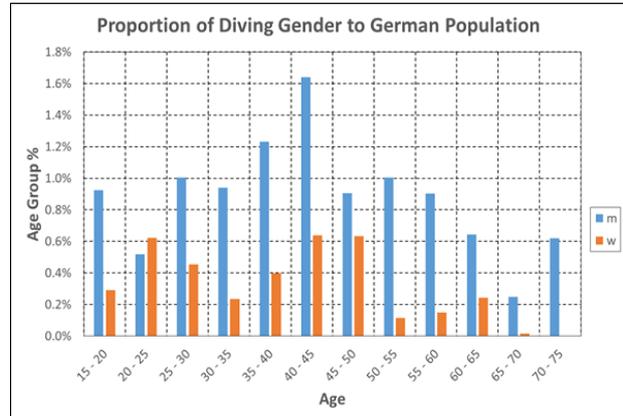
Leisure Divers 2014:

- Men 155'000 (68%) / women 75'000 (32%)

- Number remains unchanged compared to 2009, age structure shifted:
Decline in younger age group < 45,
Extremely increase at older age group > 45
Tendency: reactivation of inactive older Leisure Divers

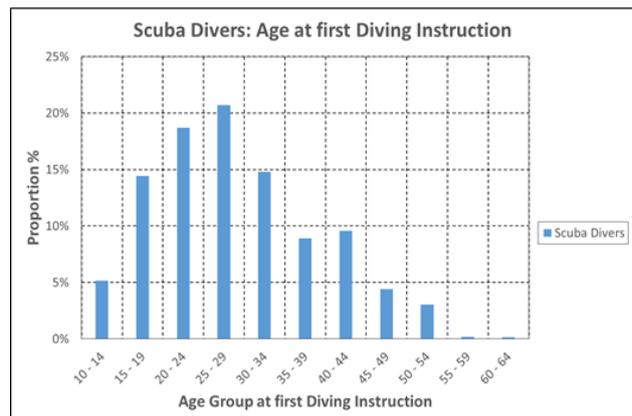
Proportion of male and female divers at age group of population

- Men:
Ongoing stable about 1% at all age groups < 55,
then, age-related termination
- Women:
Entry about 0.6%,
Decrease at age group 25-35
(family-related ? (!)) to 0.2%,
Then a reactivation to 0.6%,
Clear age-related termination >50 (!)



Initial training and termination rate

- About 63% of all divers in all age groups got their initial training between an age of 15 and 35. Initial trainings of fifty-year old people are rather seldom.
- Still about 40'000 German divers complete an initial training annually.
- Hereof become about 10'000 people per year Scuba Divers with an own complete equipment who will stick relatively long-termed to diving at a termination rate of approx. 4% per year.



- From the 30'000 annually trained Leisure Divers stay only half of them active after three years, one-third is only active five years later. At the remaining 10'000 Leisure Divers the termination rate is only approx. 5% per year.
- I.e. From the 40'000 divers getting initial training per year only one-half keep involved to diving long-termed.

Level of Training

- 71% of approx. 400'000 active divers have an advanced or semi-professional training.

Averaged number of dives

- In total:
Beginners 31 / advanced: 296 / semiprofessionals 1'339 dives
- 2013:
Beginners 10 / advanced 31 / semiprofessionals is 85 dives

Hobbies

The survey asked for additional hobbies, answers via free-text, multiple responses allowed. The responses are bundled to 41 hobby groups.

- Half of the ten most frequently mentioned hobbies are sports.
- Most frequently mentioned are by about 10% of the divers cycling (bicycle, mountain bike, etc.) and swimming.
- About 7% of men are actively involved in rescue services (DLRG, fire brigade, etc.)
- At women dominate: swimming, ball sports (without soccer), cycling
- There are clear differences in the preferences of hobbies not only between the sexes but also between the age groups.

Intensity of certain leisure activities

The survey asked how intensive certain leisure activities were exercised.

Divers practice often or intensive

- Diving:
Men 65% / women 62%
- Swimming:
Men 44% / women 44%
- Cycling, biking:.
Men 24% / women 31%
- Fitness training:
Men 25% / women 26%
- Running, jogging:
Men 25% / women 25%
- Winter sports:
ben 10% / women 13%
- Camping, Caravanning:
Men 10% / women 11%
But 20% of the men in the age group > 60
- Boating:
Men 10% / women 5%
But 21% of the men in the age group > 60

Information Channels

Of interest was how intensive do divers use special information channels for their hobbies.

Divers use often or intensive

- The Internet
Scuba Divers: 71% / Leisure Divers: 64%
- The circle of friends:
Scuba Divers: 58% / Leisure Divers: 58%
- A club:
Scuba Divers: 55% / Leisure Divers: 60%
- the specialist press
Scuba Divers: 42% / Leisure Divers: 26%
- Social media (Facebook, etc.) :
Scuba Divers: 31% / Leisure Divers: 20%
- Diving schools, diving centers:
Scuba Divers: 28% / Leisure Divers: 30%
- Fairs, Events:
Scuba Divers: 21% / Leisure Divers: 17%
- Travel agencies:
Scuba Divers: 8% / Leisure Divers: 12%

Aspects for selecting a diving spot

Of interest was the importance of some aspects for selecting a diving spot.

“Important” or “very important” were

Water related:

- Richness in animal/fish:
for men 82% / for women 84%
- Flora and fauna:
for men 77% / for women 84%
- Water quality:
for men 76% / for women: 79%
- Visibility:
for men 67% / for women 71%
- Water depths:
for men 35% / for women 22%
- Underwater activities:
for men 18% / for women 11%

Infrastructur

- Filling station:
for men 61% / for women 63%
- Resting area:
for men 42% / for women 45%
- Toilets/showers:
for men 39% / for women 51% (!)
- Rental equipment:
Leisure Divers:
for men 39% / for women 48%
Scuba Divers:
for men 6% / for women 5%
- Medical care:
for men 37% / for women 44% (!)
- Accommodation:
for men 34% / for women 39%
- Cleaning area:
for men 33% / for women 45% (!)
- Gastronomy:
for men 25% / for women 27%
- Diving shop/diving center:
for men 22% / for women 28%
- Changing rooms:
for men 11% / for women 29% (!)
- Play ground:
for men 4% / for women 13% (women with children? (!))

Factors of Attractivity

The question was, "Which factors (on a list) would make diving more attractive?"

As "important" to "very important" factors are mentioned

- Useful tasks at diving (e.g. assistance at aid corporations, scientific tasks, etc.)
Leisure Divers:
by men 53% (!) / by women 48% (!)
Scuba Divers:
by men 40% / by women 33%

- More comfort at the site:
 - Leisure Divers:
 - by men 47% (!) / by women 26%
 - Scuba Divers:
 - by men 23% / by women 28%
- Diving plus other activities:
 - Leisure Divers:
 - by men 37% / by women 39%
 - Scuba Divers:
 - by men 33% / by women 22%
- Organized diving trips:
 - Leisure Divers:
 - by men 26% / by women 56% (!)
 - Scuba Divers:
 - by men 19% / by women 18%
- Family-friendliness:
 - Leisure Divers:
 - by men 14% / by women 23%
 - Scuba Divers:
 - by men 16% / by women 8%

Financial expense for diving

The average diver invest - status 2014 - the following amount for diving:

- Value of current equipment
 - Leisure Divers: 500 €
 - Scuba Divers: 2'800 €
- Annual expenditures for diving trips
 - Leisure Divers: 1'100 €
 - Scuba Divers: 1'900 €
- Annual expenditures for seminars and training
 - Leisure Divers: 200 €
 - Scuba Divers: 250 €
- Expenditures for equipment
 - Leisure Divers: 200 €
 - Scuba Divers: 300 €

Note:

Compared to the results of the survey in 2009

- Expenditures for equipment and seminars of Leisure Divers has doubled.
- Expenditures for diving trips of Leisure Divers increased significantly.

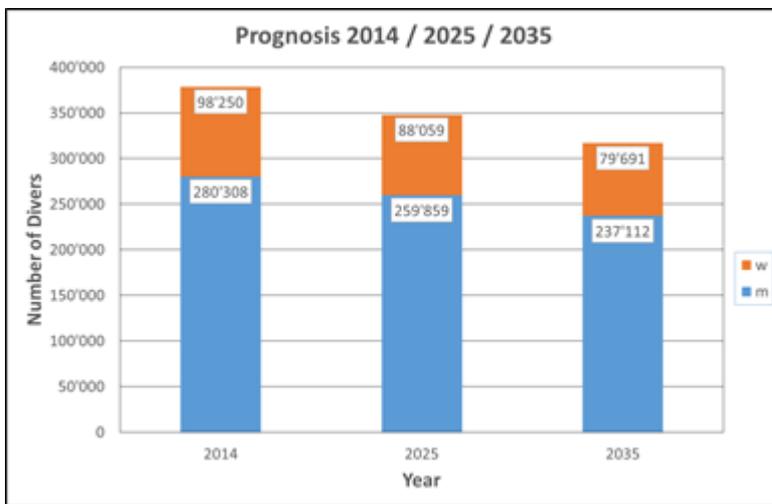
Extrapolation: Estimated Market Volumes

From the above-mentioned data result – status 2014 – the following extrapolated market volumes per year (in brackets the change compared to the data of 2009):

- Diving equipment approx. 120 Mio. €/year (+ 8%)
- Seminars and training approx. 67 Mio. €/year (+58%)
- Diving trips approx. 590 Mio. €/year (+88%)

The data suggest as if Leisure Divers could be motivated significantly to be more involved in diving during the last five years.

Prognosis



Age Group 15 - 75

- Due to the demographic change in Germany (especially the decline in initial training of the important age group 15-35) a decrease in initial trainings per year is to be expected - and as a result - a decline of active divers of approx. 1% annually.

18 Disclaimer and contacts

To err is human that is why the following must be declared:

The data and information represented in this report were surveyed, analyzed and evaluated with due care. However, there is the chance that at the survey of data, the analysis and interpretation or at writing mistakes may be occur.

The author takes full responsibility for this publication but declines liability of losses or damages that could result from this work or from use of surveyed information.

In case of remarks and questions regarding this study, please contact informally:

Principal of surveying:

- Tauchsport-Industrieverband (tiv)
im Bundesverband Wassersportwirtschaft e.V.
Gunther-Plüschow-Strasse 8
50829 Köln
Tel.: (+49) 221 - 59 57 10
Fax: (+49) 221 - 59 57 110
E-Mail: info@tauchsportindustrieverband.de

Responsible for this report:

- Forschungsvereinigung für die
Sport- und Freizeitschiffahrt e.V. (FVSF)
Gunther-Plüschow-Strasse 8
50829 Köln
Tel.: (+49) 221 - 59 57 10
Fax: (+49) 221 - 59 57 110
E-Mail: info@fvfsf.de
- Dipl.-Ing. Dr. Wolf-Dieter Mell
Institut für Boots-Tourismus (IBoAT)
Jenastr. 14
53125 Bonn
Tel.: (+49) 228 - 25 62 92
E-Mail: mell@iboat.de

The Tauchsport-Industrieverband (tiv) is the interest representation for manufacturers and importers of diving articles in Germany. It was founded in April 2006 and has 12 members at present; head Werner Thomaier (Aqua Lung GmbH), deputy chairperson Thomas Dederichs (Bts Europa AG).

<p>AC Inox GmbH Joseph - von - Frauenhofer Str. 3c 52477 Alsdorf 02404 - 90 32 660 02404 - 55 16 151 info@polaris-diving.com www.polaris-diving.com</p>	<p>Aqua Lung GmbH Josef-Schöttler-Str. 12 78224 Singen 07731 - 93 45 42 07731 - 93 45 60 info@aqualung.de www.aqualung.de</p>	
<p>Bts Europa AG Klosterhofweg 98 41199 Mönchengladbach 02166 - 67 54 11 - 0 02166 - 67 54 11 - 15 info@bts-eu.com www.bts-eu.com</p>	<p>BEUCHAT INTERNATIONAL S.A 34 Avenue Boisbaudran 13344 Marseille CEDEX 15 - FRANCE 0033 491 09 44 60 0033 491 60 70 00 info@beuchat.fr www.beuchat.fr</p>	
<p>iQ-Company AG Am Klingenweg 12 65396 Waluf 06123 - 99 490 06123 - 99 49 449 info@iq-company.com www.iq-company.com</p>	<p>Johnson Outdoors Vertriebsgesellschaft mbH Johann Höllritsch Str. 47 90530 Wendelstein 09129 - 90 99 521 09129 - 90 99 550 office@seemannsub.de www.seemannsub.de</p>	<p>Mares S.p.A Velaskostraße 8 85622 Feldkirchen 089 - 9099950 089 - 90999519 mares@de.mares.com www.mares.com</p>
<p>Oceanic Tauchsport Vertriebs GmbH Am Mittleren Moos 36 86167 Augsburg 0821 - 81 03 42 - 0 0821 - 81 03 42 29 office@oceanic.de www.oceanic.de</p>	<p>PADI EMEA Ltd. The Pavilions, Bridgewater Road GB - Bristol BS13 8AE 07736 -9249952 sylvia.ross@padi.com www.padi.com</p>	<p>Poseidon Tauchprodukte Pretzer Chaussee 171 24222 Schwentinental 0431 - 79 85 0 0431 - 79 95 25 info@poseidon-kiel.com www.poseidon-kiel.com</p>
<p>ProSub Deutschland Grenzhub 5a 83229 Aschau i. Ch. 08057 - 90 46 74 08057 - 90 46 76 info@prosub.de www.prosub.de</p>	<p>SSI GmbH Johann Höllritsch-Str. 6 90530 Wendelstein 09129 - 90 99 38 0 09129 - 90 99 38 50 info@diveSSI.com www.diveSSI.com</p>	<p>Verband Deutscher Sport e.V. (VDST) Berliner Str. 312 63067 Offenbach/Main 069 - 98 19 02 5 069 - 98 19 02 86 info@vdst.de www.vdst.de</p>